



# **Commodity Classification**

## **User Guide**

**February, 2022**

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## REVISIONS

Date	Version	Description	Author
17 October, 2016	1.0	Document updated with latest screenshot and functionality as per R1-2016 release.	Rohit Manhas / Imran Mustapha
10 January, 2017	2.0	Document updated with latest screenshot and functionality as per 2017 –R1 release.	Rohit Manhas / Imran Mustapha
25 January, 2018	2.1	Document updated with latest screenshot and functionality as per new features added after 2018 release.	Rohit Manhas / Imran Mustapha
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10 February, 2022	6.0	Document updated with latest screenshot and functionality as per 2022 release.	Rohit Manhas / Imran Mustapha

*Table 1: Revision History*

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## 1. INTRODUCTION

Global EASE™ (herein referred to as System) is a web-based enterprise-wide solution used to automate and manage your business process for requesting and applying for Export and Import Licenses from various government agencies, managing the licenses, creating documents necessary for export and imports and sending these documents to your customers, vendors, freight forwarders, or brokers. The System also automates the filing of export and import information to customs and makes sure that your export and import processes comply with the countries' regulations where you do business.

The System leads directly to higher corporate-wide compliance standards, defined work processes, quality improvement in the entire business process and ease in license acquisition & license usages, exporting and importing goods with much less time and effort.

This document is a screen-by-screen User Guide of the “Commodity Classification” product feature. It contains proprietary screenshots and descriptive text for the Commodity Classification features and reports. This User Guide will cover all aspects of the User Interface without regard to the type of User. However, depending on your subscription or user privileges, some aspects of this guide might not apply.

### 1.1 Summary of Contents

The User Guide is structured as follows:

- [Chapter 1](#) provides an introduction to this User Guide.
- [Chapter 2](#) provides an overview of the Commodity Classification features, including the purpose, usage, functions, and application configuration.
- [Chapter 3](#) describes the procedural steps to use the Commodity Classification Form feature.
- [Chapter 4](#) describes the reports of the Commodity Classification.
- [Appendix A](#) provides a listing of figures used in this User Guide.
- [Appendix B](#) provides a listing of tables used in this User Guide.

### 1.2 Readership

The intended audience for this User Guide is:

- A Business Person, Export Compliance Officer or Various Industries User, responsible for creating Commodity Classification Request.
- A typical user will be a Compliance Manager (Privileged User) and User (Regular User).

### 1.3 How to Read this Document

Each System User Guide provides a simple step-by-step approach to help you understand and navigate the screen fields quickly and accurately. An example of each screen is provided, including information about initially navigating to the screen/process start point. Each step corresponds to a field within the screen and follows a horizontal path across the screen and then down to the row below. The User Guide makes extensive use of icons rather than rich descriptive text to describe the behaviors, validations, and requirements of the fields, screen responses, and User or System invoked navigations.

The following table describes the icons:

Icon	Name	Description
	User Action	Activities you may perform as a result of actions, such as clicking a button on the screen.
	System Action	The System's activities result from user actions such as clicking a button on the screen or choosing an option within a pop-up (dialogue box).
	Facts	This icon represents essential factual information that enables you to determine the content, validation, and/or behavior of the field it is describing.
	Warning/Errors	This icon represents common reasons for errors associated with incorrect field completion or missing mandatory information.

*Table 2: Description of Icons*

## 1.4 Glossary

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The following table lists the terms and descriptions used in this User Guide.

Terms	Description
CCL	Commerce Control List
CJ	Commodity Jurisdiction
ECCN	Export Control Classification Number
FTA	Free Trade Agreement
HTS	Harmonized Tariff Schedule
ITAR	International Traffic in Arms Regulations
ITC	International Trade Commission
NAFTA	North American Free Trade Agreement
SBU	Strategic Business Unit
USML	United States Munitions List

*Table 3: Glossary*

## 2. OVERVIEW

---

The Commodity Classification module enables corporations to implement a uniform and consistent corporate wide Product Classification and Jurisdiction Request process, and internal review policy for Customs and Export Classifications of Product Catalog. The process allows for multiple levels of review to ensure a complete review cycle of Product Classification Requests for record-keeping and to comply with any U.S. regulations.

### 2.1 Purpose

---

The Commodity Classification Request captures initial Product Details along with a questionnaire to guide the request and help to make determinations. All information is automatically stored in System and communicated to the appropriate System User or Reviewer who is selected for Review.

The Review of a Commodity Classification Request takes place within System for record-keeping. The form ultimately leads to a final determination of an Export Classification or a Request for a Commodity Classification/Commodity Jurisdiction. The form also captures Customs Classifications for HTS, Schedule B, and other related HTS rulings.

The information can then be rolled into the Product Database of the specified Business Unit for easy access throughout the System for Licensing or Export/Import Shipments, etc.

### 3. COMMODITY CLASSIFICATION FORM

The Commodity Classification Module can track:

- Requests for Export Classification for single and group of similar parts
- Requests for Customs Classification including HTS and Schedule B
- Configurable Questionnaires to support internal reviews of Classification Requests
- NAFTA qualification and FTA program qualification worksheets
- Requests for re-classification of existing products based on regulatory changes
- Ability to support Commodity Jurisdiction and related rationale
- Support for multiple reviewers and workflows for specific classifications
- Ability to hold for Commodity Classification, CJ, and Track Reference Numbers while in process

Any employee, company engineer, or contractor who has access to the company's Compliance Portal may submit a Commodity Classification and Jurisdiction Request for internal review. The person does need to be a System user.



All the system-generated emails related to Commodity Classification will be sent to Owners listed on the Request and to Requestors and Managers.

#### 3.1 Create New Request

Refer to the following steps to begin the Commodity Classification Process as an external user.

1. To begin the Export Request Process, click on the **Compliance Portal Link** from the **System Login** screen.



Refer to the following table for fields description. Requestors through the Portal are considered "Un-Registered Users" and can be Employees, Engineers, etc. that in some cases do not have access to log into the System.

In some cases:



- Companies may have Active Directory implemented in which you would provide your Network ID and Password on the System Login screen to navigate to the Compliance Portal.
- Companies may provide a direct link to the Portal without navigating to the System Login screen.

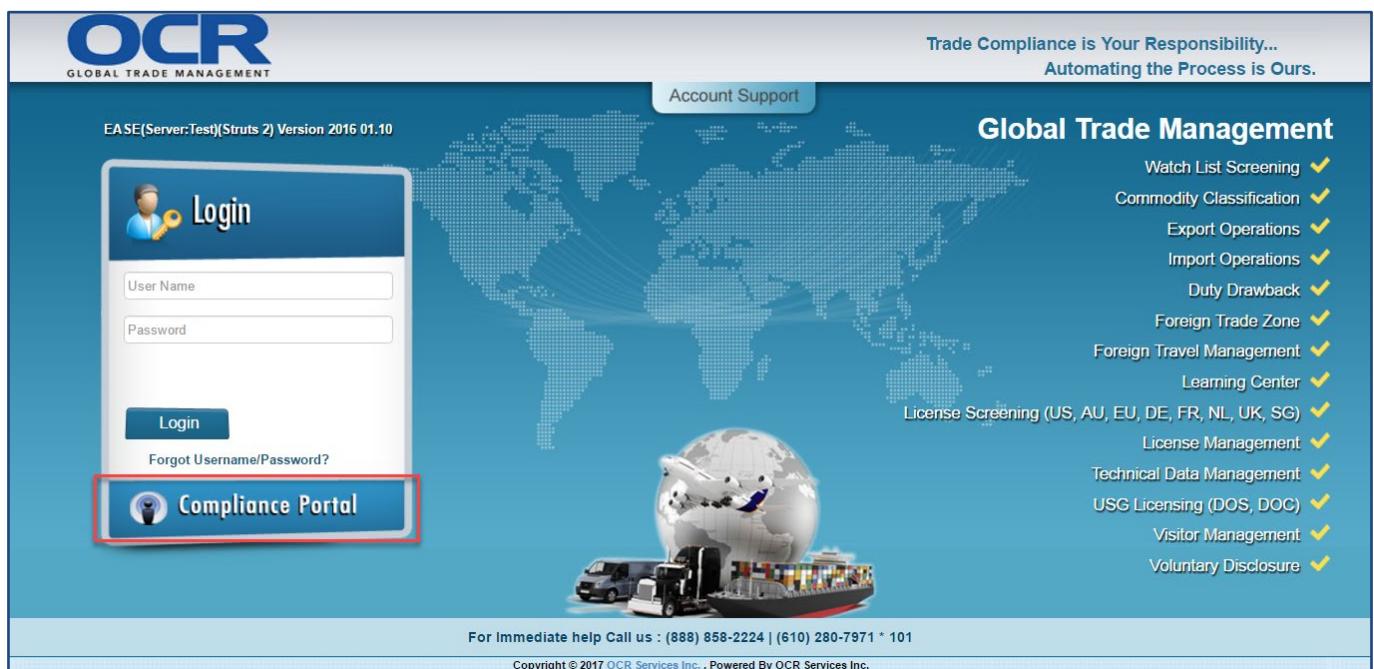


Figure 1: Compliance Portal Link



The System Compliance Portal screen is displayed.

Welcome to the EASE Compliance Portal!

You may use this internal portal to perform various activities within your organization, as applicable.

- Perform denied party screening for upcoming orders or potential business partners
- Submit and manage electronic requests for authorizations to export or import, or on-site visits, travel requests, etc.
- Check for up to date Status information regarding your internal requests
- Upload supporting documentation for related transactions
- Generate reports for your records

**Figure 2: System Compliance Portal Screen**



Requestors through the Portal are considered "Un-Registered Users" and can be Employees, Engineers, etc. that in some cases do not have access to log into the System application.

2. On the System, Compliance Portal screen, under the Features drop-down menu, select the Commodity Classification Form option (Compliance Portal -> Features -> Commodity Classification Form).



The Search Commodity Classification Form screen is displayed.

**Figure 3: Commodity Classification Form Navigation**

**Add New Commodity Classification**



The Commodity Classification Template screen is displayed.

**Figure 4: Commodity Classification Template Screen**



The form will auto-populate the 'SBU', 'Requestor Name', and 'Email Address' fields.

**Figure 5: Create New Commodity Classification Request Screen**



Following tables lists the other available option on the Search Commodity Classification Form screen.

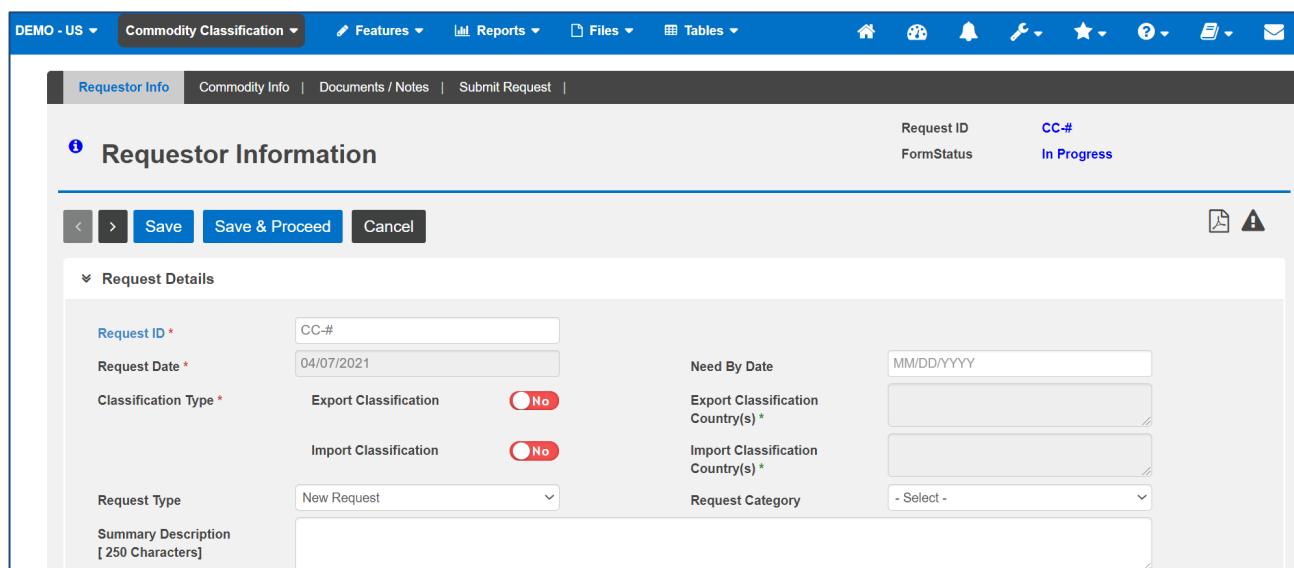
Options	Description
Check Status of Existing Request	If you need to check the Status of a Request, enter the Request ID or E-mail ID and click the 'Go' button.
Add Information/Update Existing Request	If you need to add information to a Request form in progress, enter both the Request ID and your E-mail address and click the 'Go' button.
Retrieve all Pending Requests	Click this link to view a complete list of Requests currently being reviewed internally.
Search Existing Requests	Click this link to search and filter for particular Requests in the system.
Product Reports (Under Reports Menu)	As an Unregistered User, you still have access to various Reports related to the Product Table and Request forms. Click on the appropriate links to generate particular Reports as needed.

**Table 4: Search Commodity Classification Form Screen Options**

1. On the **Commodity Classification Template**



The Requestor Info tab is displayed.



**Figure 6: Requestor Info Tab**

2. On the **Requestor Info** tab, enter the details of the request, alternate contact and summary description.

- Mark **Request Type**: New Request, or Re-Classification Request

b. **Mark Request Category:** Internal, Supplier/3rd Party, or Predetermined Classification



*Apart from the fields listed in asterisks in Figure 38, all fields on this page are configurable, under Tools -> Field Configuration.*

c. **Mark if requesting:**

- Export Classification
- Imports Classification



*The above-mentioned flags will display and be enforced based on workflow and parameters defined by Admin Users.*



*The User can also add the Product/Design engineer as well as a Manager by clicking the **Add Contact Details** button if required.*

**Save**

Requestor Info      Commodity Info | Documents / Notes | Submit Request |

Request ID: CC-#125      CC-#: In Progress

FormStatus: In Progress

**Requestor Information**

Request Details

Request ID \*: CC-#125      Request Date \*: 05/03/2021      Need By Date: MM/DD/YYYY

Classification Type \*: Export Classification      Yes      Import Classification: Yes

Export Classification Country(s) \*: UNITED STATES      Add Country

Import Classification Country(s) \*: UNITED STATES      Add Country

Request Type: New Request      Request Category: Internal

Summary Description [218 Characters]: Classification for Turbo Engines

Commodity Type: Ground Support and Engines      Commodity Type Other:

Program [1,096 Characters]: DC17      Segment [237 Characters]: Turbo Engines

**Figure 7: Requestor Information**



*If the Export Classification slider is selected as 'Yes', the Export Classification tab will be displayed.*



*If the Import Classification slider selected as 'Yes', the Import Classification tab will be displayed.*

**Save & Proceed**



*The Commodity Info tab is displayed.*

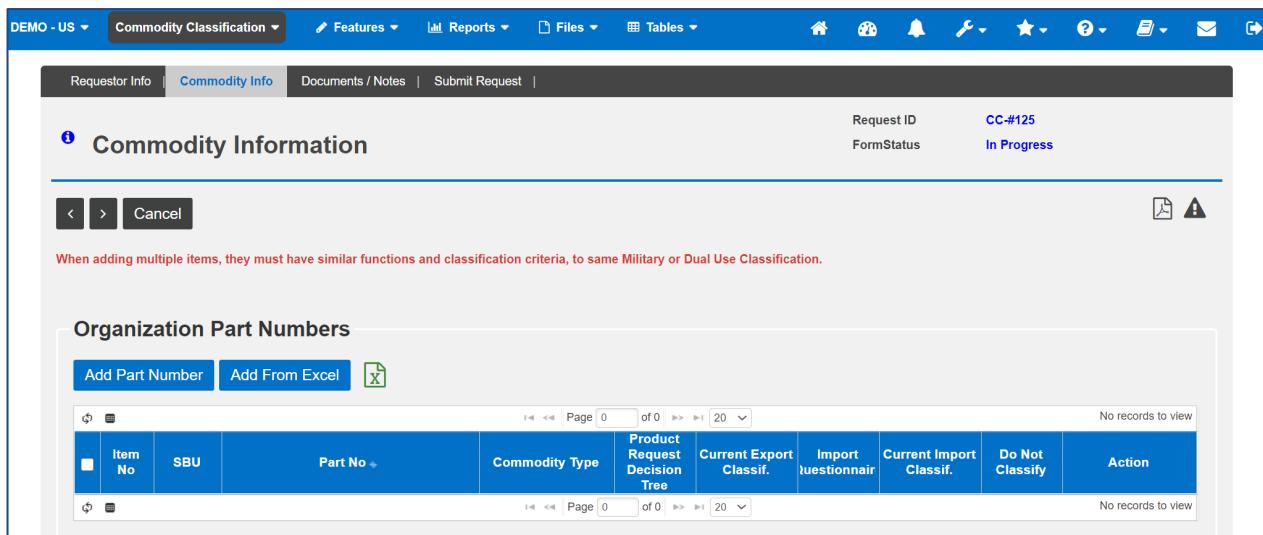


Figure 8: Commodity Info Tab

Add Part Number



The User can also add multiple items from an excel file by clicking the **Add From Excel** button and uploading the file in the system. Click the  icon to download the template file.



When adding multiple items, they must have similar functions and classification criteria – to the same USML or ECCN Classification – if to be reviewed for Export Classification!



The Add/Edit Part Number screen is displayed.

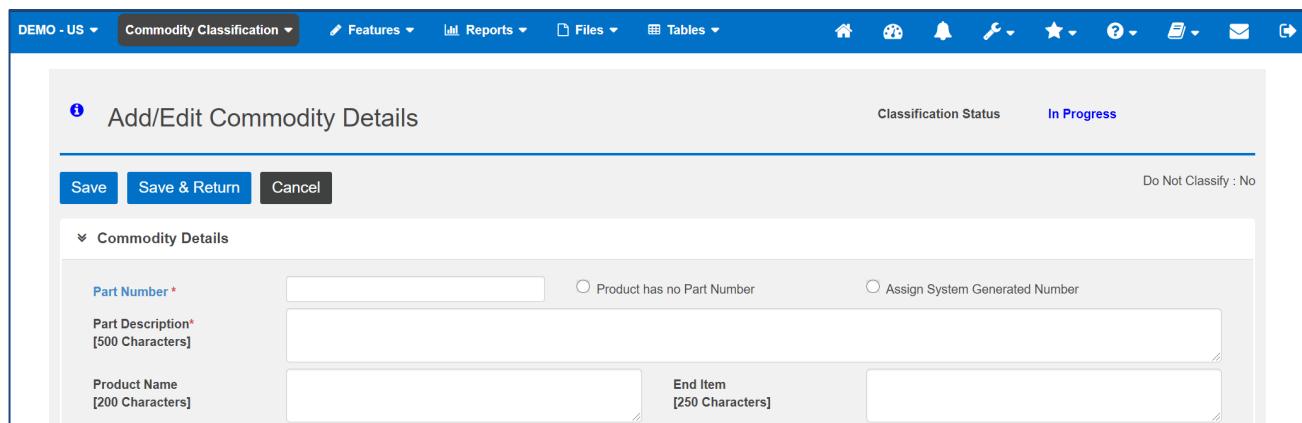


Figure 9: Add/Edit Part Number Screen

6. On the **Add/Edit Part Number** screen, from the **Part Number** field, select or enter the required part number or select other available options.



Select the 'Product has no Part Number' radio button if the part number for the product is not available.

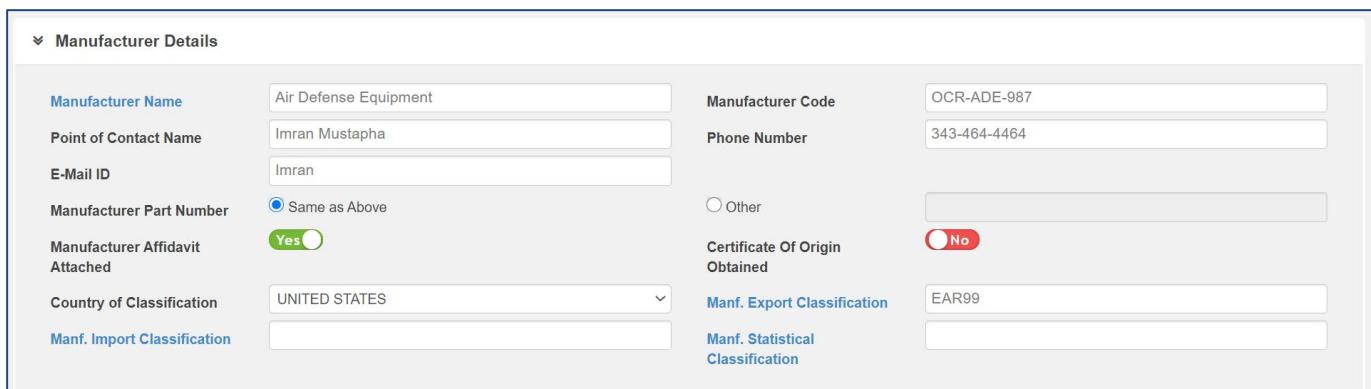


Select the 'Assign System Generated Number' radio button if the part number for the product is not available and you want to create a new system generated part number.

7. In the **Commodity Details** section, enter the product details in the available fields such as:

- In the **Product Name** field, enter the actual name of the Part No./Product
- Select 'Yes' in the **Company is Design Authority** slider if the part falls in the category
- In the **Plant ID** field, enter the corresponding Plant where the Product is associated with
- Enter the **Security Classification** i.e. (Confidential, Secret, Un-classified) as well as any other level of security classification

8. In the **Manufacturer Details** section, enter the details of the manufacturer:



**Figure 43: Manufacturer Details Section**



The fields related to **Classifications** are for when the Manufacturer already has an Export/Import/Statistical Classification for the Product

9. In the **Country of Origin** field, select the desired radio button. The **Country of Origin Name** field displays the country based on the selection.



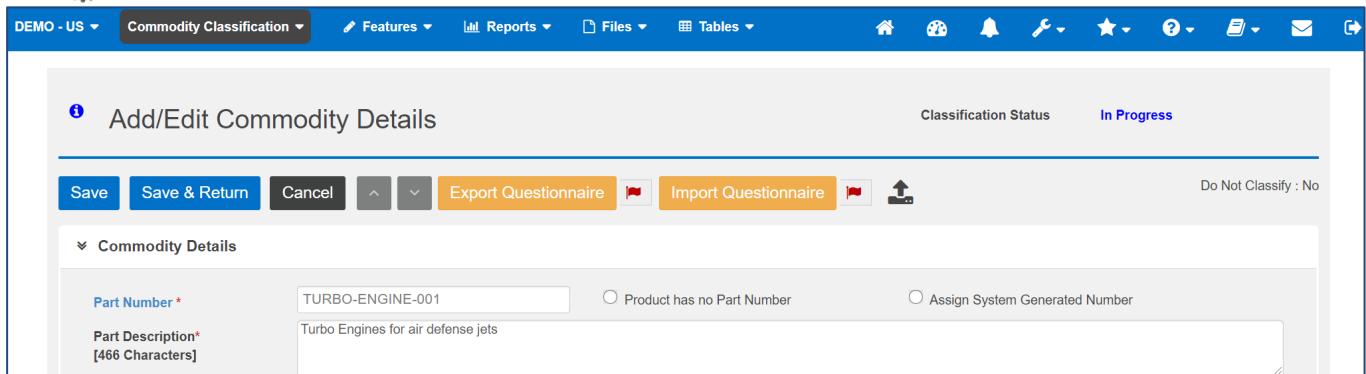
The **Add Countr(ies) of Content** button is enabled, click the button to add more countries.



**Figure 10: Add Countries**



The Add/Edit Part Number screen is redisplayed with saved information and the **Import Questionnaire** button.



**Figure 11: Add/Edit Part Number Screen – Details**



### Import Questionnaire

The Import Questionnaire screen is displayed with questions.

Request ID: CC-#125  
Form Status: In Progress

Save Save & Return Cancel

Part No: TURBO-ENGINE-001  
Part Description: Turbo Engines for air defense jets  
Product Name:

**Documents**

Add Document

Document Type	Document Name/Url Link/Location Path	Store Type	Description	Section	Classification	J/C Source	Marking Selection	Source Info	Post Approval	Attached Date	Attached By	Edit	Delete
												No records to view	

**Part Description**

1) Describe the product, include supporting documents if necessary.

Characters Remaining: 2,000

**Figure 12: Product HTS Questionnaire Screen**

12. On the **Import Questionnaire** screen, in the **Documents** block, upload the document related to the commodity.

Request ID: CC-#125  
Form Status: In Progress

Save Save & Return **Apply Responses** Cancel

Part No: TURBO-ENGINE-001  
Part Description: Turbo Engines for air defense jets

**Figure 13: Apply Response Button**



The **Apply Responses** button is displayed. User can use this button to apply the same response of answers to another item.



User can also attach the related documents, if required.

14. Once all questions are answered and documents are attached, click the **Save & Return** button to redirect to the Add/Edit Commodity Details page and we can choose to answer the **Export Questionnaire** by clicking the **Export Questionnaire** button.

DEMO - US Commodity Classification Features Reports Files Tables Home Bell Star Help

## Export Questionnaire

Request ID: CC-#125  
Form Status: In Progress

Save Save & Return Cancel

Part No: TURBO-ENGINE-001  
Part Description: Turbo Engines for air defense jets  
Product Name:

### Export Control Questions

**Q 1** Was this commodity originally designed, developed and/or built for a military application or military platform?  Yes  No  
--- If Yes then explain

**Q 2** Was this commodity originally designed, developed and/or built for dual use, civilian property?  Yes  No  
--- If Yes then explain



In the Export Questionnaire screen, answer all the available questions and click the **Save** button. Select the 'Yes', 'No' or 'Unknown' radio button and give an explanation for the decision where required.



In addition to the standard set of questions, Administrators can configure the form to include customized sets of Questions to support internal business processes. Administrators should refer to the Questionnaire Configuration section for further information.



If the Review Process is ONLY HTS Review, then the Export Questionnaire Tab can be skipped. These Questionnaires can also be made Mandatory or Optional under' Questionnaire Forms Configuration'.

Save & Return



The Commodity Information screen is displayed with the product details in the table

DEMO - US Commodity Classification Features Reports Files Tables Home Bell Star Help

Requestor Info Commodity Info Documents / Notes Submit Request Request ID: CC-#125 Form Status: In Progress

< > Cancel

When adding multiple items, they must have similar functions and classification criteria, to same Military or Dual Use Classification.

### Commodity Information

Organization Part Numbers

Add Part Number Add From Excel

Item No	SBU	Part No	Product Family	Product Line	Export Questionnaire	Current Export Classif.	Import Questionnaire	Current Import Classif.	Do Not Classify	Action
1	DEMO	RM001	Radar Technology	Technology for internal use only						

Figure 14: Commodity Information – Product Details

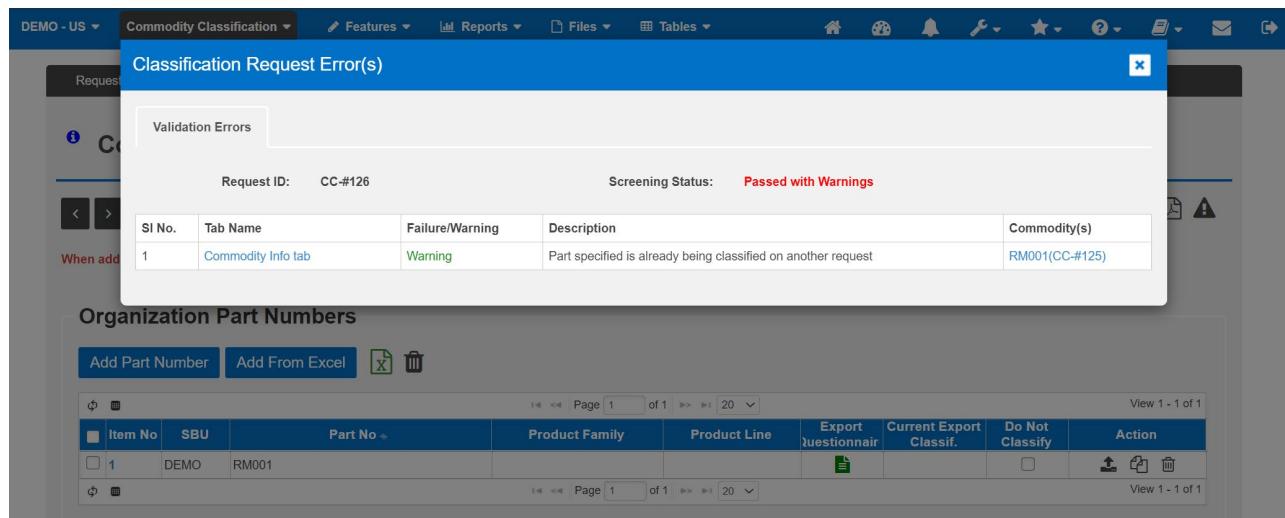
-  If you want to add more items, then click the **Add Part Number** button and refer the previous steps.
-  You can delete the multiple items, select the required items and click the  icon under Actions to delete selected items.
-  If any conflicts arise with the use of a particular Part No. and the way the Request is defined, the system will indicate notifications to the User and for potential Reviewers of the Request. Refer the following table.

The Notifications would include:

- Whether a particular Part No. mentioned, is already pending on another request
- Whether a particular Part No. mentioned, was defined as a 'New Product' but has already been classified in the Product File.
- Whether a particular Part No. mentioned, already exists in a different Strategic Business Unit (SBU).
- Whether a particular Part No. mentioned, already existing in the product file is missing Manufacturer information.

 *These warnings will not prohibit the user from proceeding with submitting the Request. If the requestor is unaware of how to manage these situations, further action will take place by the Reviewer prior to finalizing a Request.*

 The Alerts icon  shows any Warnings or Failures that will affect whether the Request will be allowed to be submitted for Review. The screening status will display whether the Request has Passed or Failed screening.



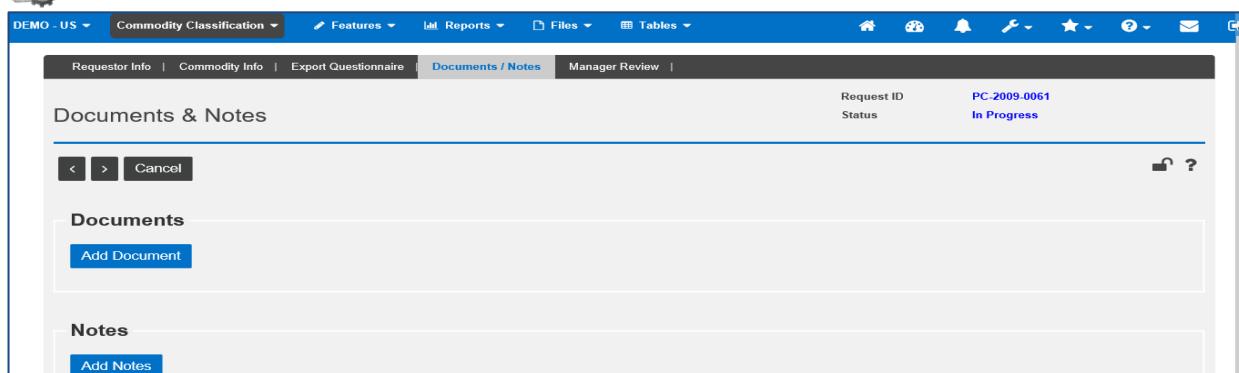
The screenshot shows a modal dialog box titled "Classification Request Error(s)". It displays a table of validation errors. The table has columns for "SI No.", "Tab Name", "Failure/Warning", "Description", and "Commodity(s)". One row shows an error for the "Commodity Info tab" with the message "Part specified is already being classified on another request" and "Commodity(s) RM001(CC-#125)".

**Figure 15: Alert Notification**

16. Once you are satisfied that the required product(s) have been added and the questions are answered, click on the right arrow  button to move to the **Documents & Notes** tab.



The Documents & Notes screen is displayed.



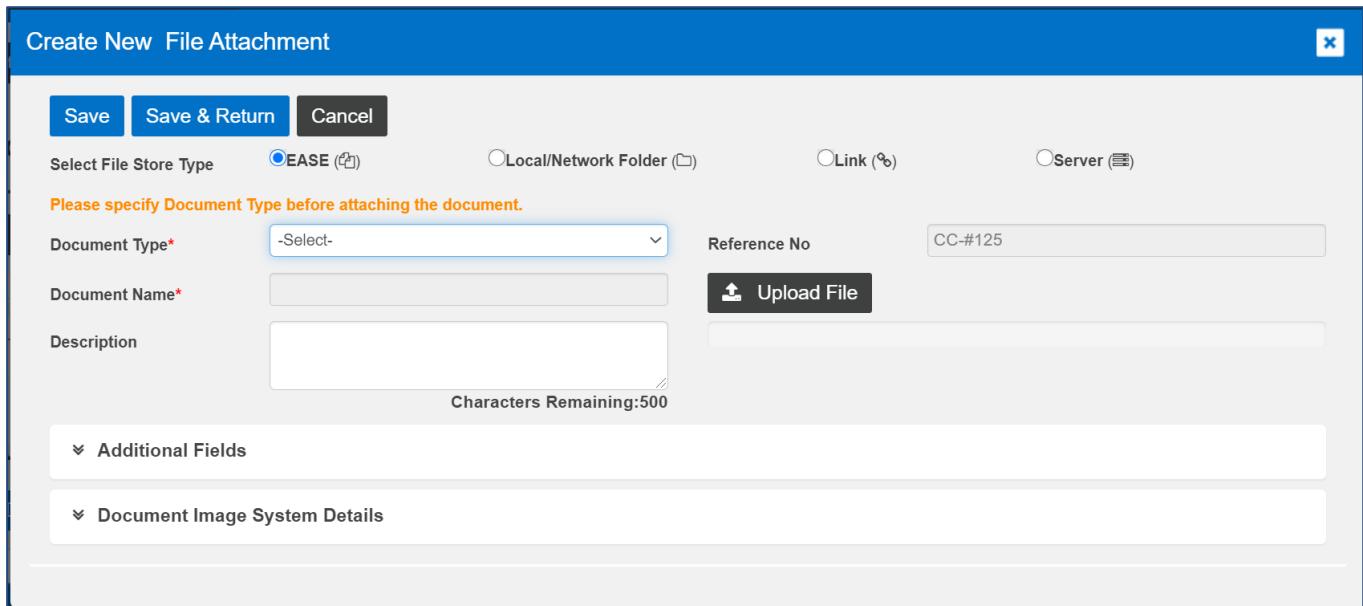
The screenshot shows the "Documents & Notes" screen. The top navigation bar includes tabs for Requestor Info, Commodity Info, Export Questionnaire, Documents / Notes (which is the active tab), and Manager Review. The main content area is titled "Documents & Notes" and contains sections for "Documents" and "Notes". Each section has a "Add Document" or "Add Notes" button.

**Figure 16: Documents & Notes Screen**

17. On the **Documents & Notes** screen, click the **Add Document** button to add document associated with the commodity.



The Create New File Attachments dialog-box is displayed.



**Create New File Attachment**

Save | Save & Return | Cancel

Select File Store Type:  EASE (F) |  Local/Network Folder (L) |  Link (L) |  Server (S)

**Please specify Document Type before attaching the document.**

Document Type\*

Document Name\*

Description

Reference No: CC-#125

Upload File

Characters Remaining: 500

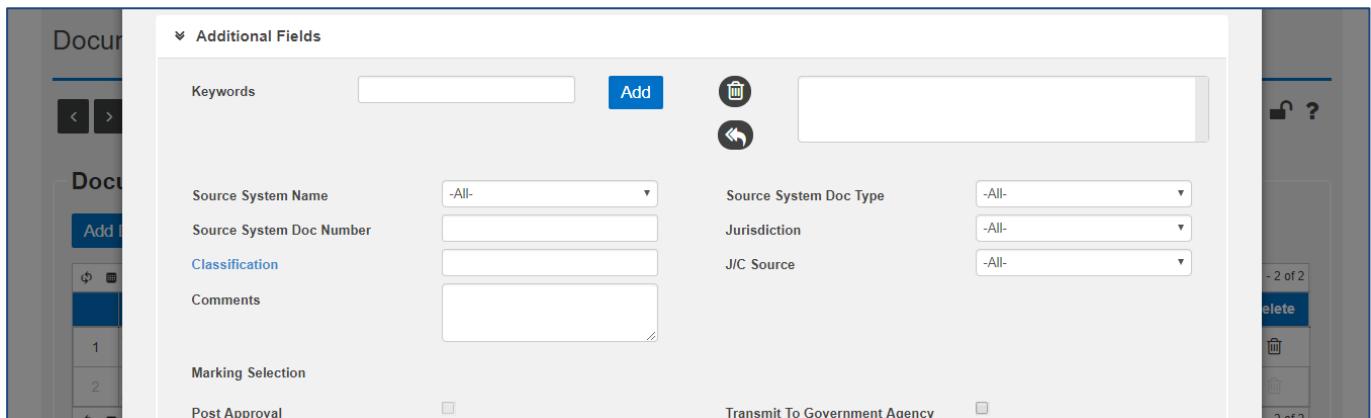
**Additional Fields**

**Document Image System Details**

**Figure 17: Create New File Attachments Dialog-box**



Click the Additional Fields drop-down panel to define the Jurisdiction, Classification of the document and flag for additional markings.



**Additional Fields**

Keywords

Source System Name:  Source System Doc Type:

Source System Doc Number  Jurisdiction:

Classification  J/C Source:

Comments

Marking Selection  Post Approval  Transmit To Government Agency

**Figure 18: Additional Fields Drop-down Panel**

18. On the **Create New File Attachments** dialog box, from the **Select File Source Type** field, select the desired option to save the uploaded documents.

19. From the **Document Type** drop-down list, select the type of document and enter the details in the other available fields.

20. Click the **Upload File...** button to add defined support documents in PDF or word format.



The **Edit File Attachments** dialog-box is displayed with an uploaded document.

**Documents**

**Add Document**

Document Type	Document Name/Url Link/Location Path	Store Type	Description	Attached Date	Attached By	Edit	Delete
1 Other Documents	Sample_Document_Upload.docx	EASE		05/04/2021	Mustapha Imran		

**Figure 19: Edit File Attachments Dialog-box**

21. Once the required documents are attached, click the **Add Notes** button to add notes.
22. Once all documents are attached and notes are added click the navigation button to move to the **Submit Request** tab.



The Submit Request screen is displayed.

DEMO - US Commodity Classification Features Reports Files Tables

Requestor Info | Commodity Info | Documents / Notes | **Submit Request**

**Submit Request**

Request ID: CC-#125  
Form Status: In Progress

**Save** **Cancel**

**Submit For Review**

By clicking the submit button below, I certify that the above information is true to the best of my knowledge and I understand that it will be used to make the classification determination.

CC Manager Reviewer\*  E-mail ID  Phone No.

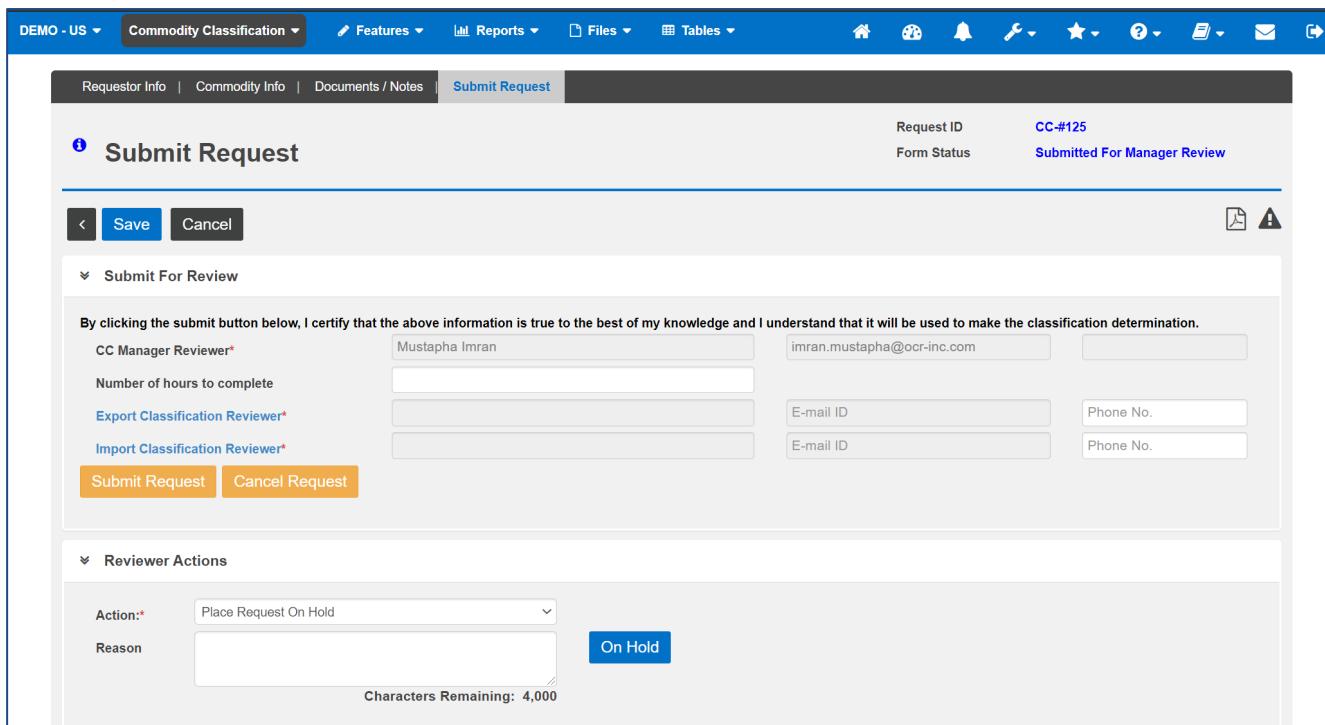
**Submit Request** **Cancel Request**

**Figure 20: Submit Request Screen – CC Manager**

-  The CC Manager is a configurable option that will only display when the ENFORCE\_CC\_MANAGER REVIEW parameter is set to a value of 'Y'.
-  The Reviewer Actions section will only display to the Manager or users with the Manager Reviewer permission after the request has been submitted for Manager Review.
-  For review procedure, refer the Section 3.2.
-  The CC Manager Review helps in situation where a requestor (Portal/Registered) may not know who they should assign the request to for Jurisdiction and/or HTS Review, in that case, requestor can just assign the request to the Manager Reviewer and then it is the job of the Manager Reviewer to assign the request to the appropriate Export and/or Import Reviewer.

23. On the **Submit to Manager** screen, in the **CC Manager Reviewer** drop-down panel, in the **Name** field, enter or select the manager.
24. Once the required manager details are added, click the **Submit Request** button to submit the request to the manager.

 For the CC Manager, the Submit Request tab will then be redisplayed with the form status changed to 'Submitted For Manager Review'. Aside from that, the Submit For Review dropdown will also be redisplayed and the Reviewer Actions section will appear.



Requestor Info | Commodity Info | Documents / Notes | **Submit Request**

Request ID: CC-#125  
Form Status: Submitted For Manager Review

**Submit Request**

Save | Cancel

Submit For Review

By clicking the submit button below, I certify that the above information is true to the best of my knowledge and I understand that it will be used to make the classification determination.

CC Manager Reviewer\*: Mustapha Imran | imran.mustapha@ocr-inc.com |   
Number of hours to complete:   
Export Classification Reviewer\*:  | E-mail ID:  | Phone No.:   
Import Classification Reviewer\*:  | E-mail ID:  | Phone No.:

**Submit Request** | **Cancel Request**

Reviewer Actions

Action\*: Place Request On Hold | **On Hold**

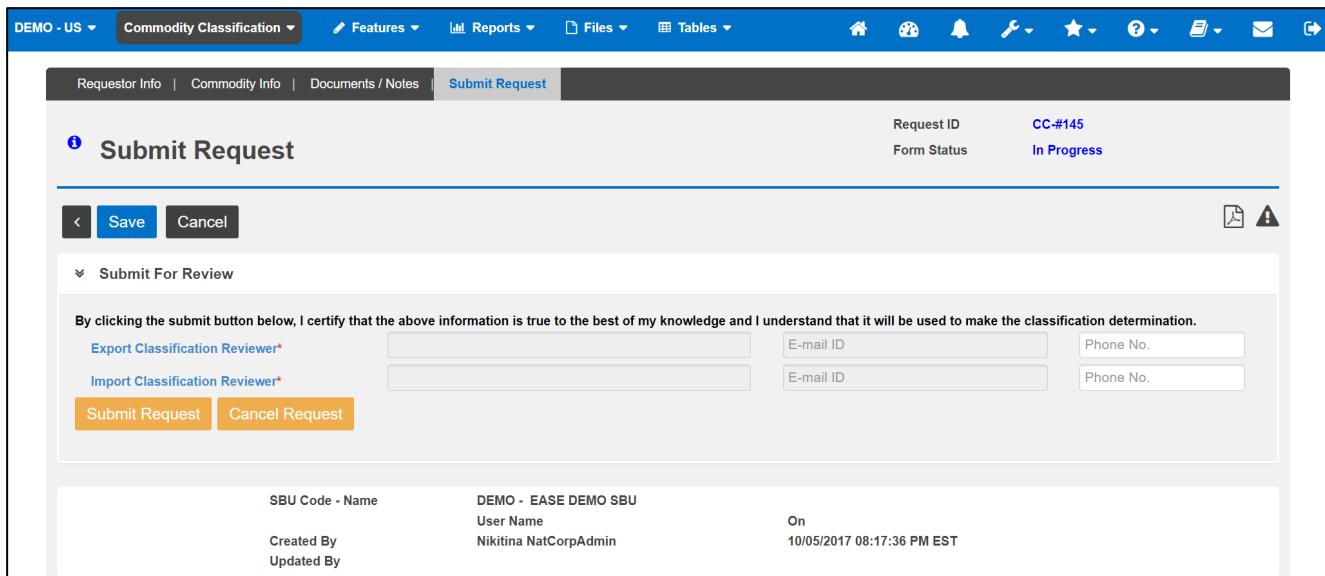
Reason:  Characters Remaining: 4,000

**Figure 21: Submit Request Screen – Submitted to CC Manager**

25. If the CC Manager configurable option is set to 'N', then the requestor will select the Export and Import reviewer for request submission.



The Submit Request Screen is displayed



Requestor Info | Commodity Info | Documents / Notes | **Submit Request**

Request ID: CC-#145  
Form Status: In Progress

**Submit Request**

Save | Cancel

Submit For Review

By clicking the submit button below, I certify that the above information is true to the best of my knowledge and I understand that it will be used to make the classification determination.

Export Classification Reviewer\*:  | E-mail ID:  | Phone No.:   
Import Classification Reviewer\*:  | E-mail ID:  | Phone No.:

**Submit Request** | **Cancel Request**

SBU Code - Name	DEMO - EASE DEMO SBU
User Name	Nikitin NatCorpAdmin
Created By	On
Updated By	10/05/2017 08:17:36 PM EST

**Figure 56: Submit Request Screen**

### 3.2 Edit Existing Request

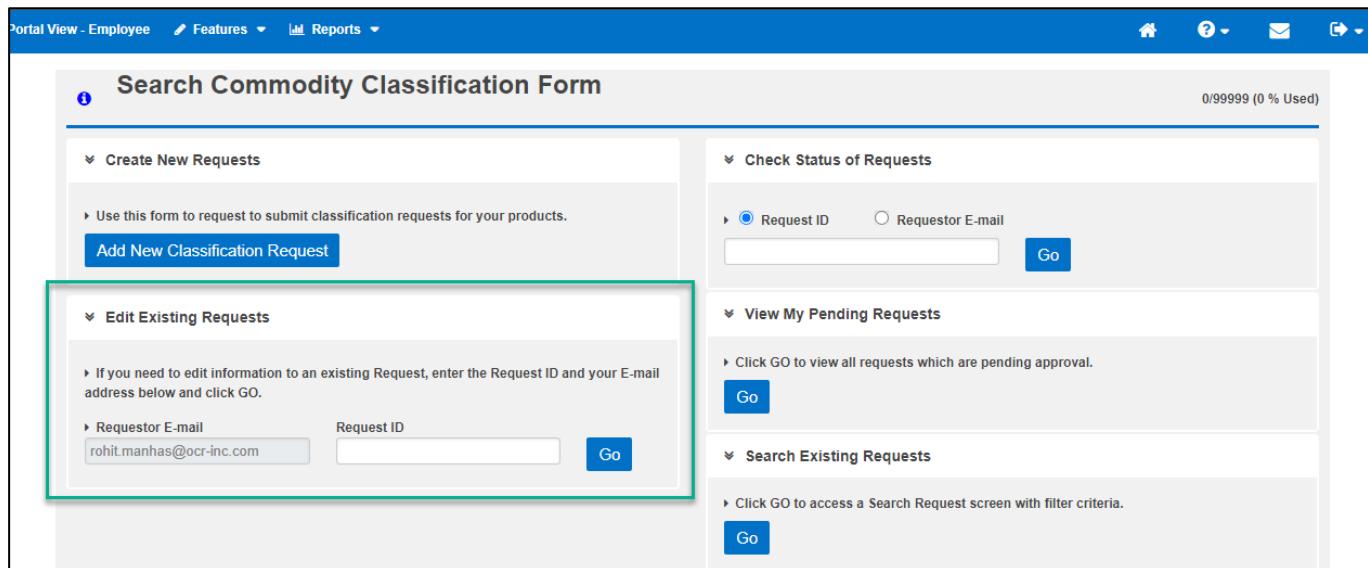
If Portal Users have a need to close out a Request prior to submitting it for Review and revisit at a later point in time, they can re-access the same form via the **Compliance Portal**.

On the **Commodity Classification Forms** screen, go to the **Edit Existing Requests** block. Users will be able to utilize this for the following purposes:

- You have closed out your Request and need to return at a later point in time to finish completing the Request,
- Or need to provide additional information as requested by a Reviewer and re-submit the case for further review.

If you need to add information to your Request form, enter the appropriate Request ID and your Email address and click the **Go** button.

**Navigation:** Commodity Classification Forms -> Edit Existing Requests



The screenshot shows the 'Search Commodity Classification Form' page. The 'Edit Existing Requests' block is highlighted with a green box. This block contains instructions for editing existing requests and includes fields for 'Requestor E-mail' (rohit.manhas@ocr-inc.com) and 'Request ID' (empty), with a 'Go' button.

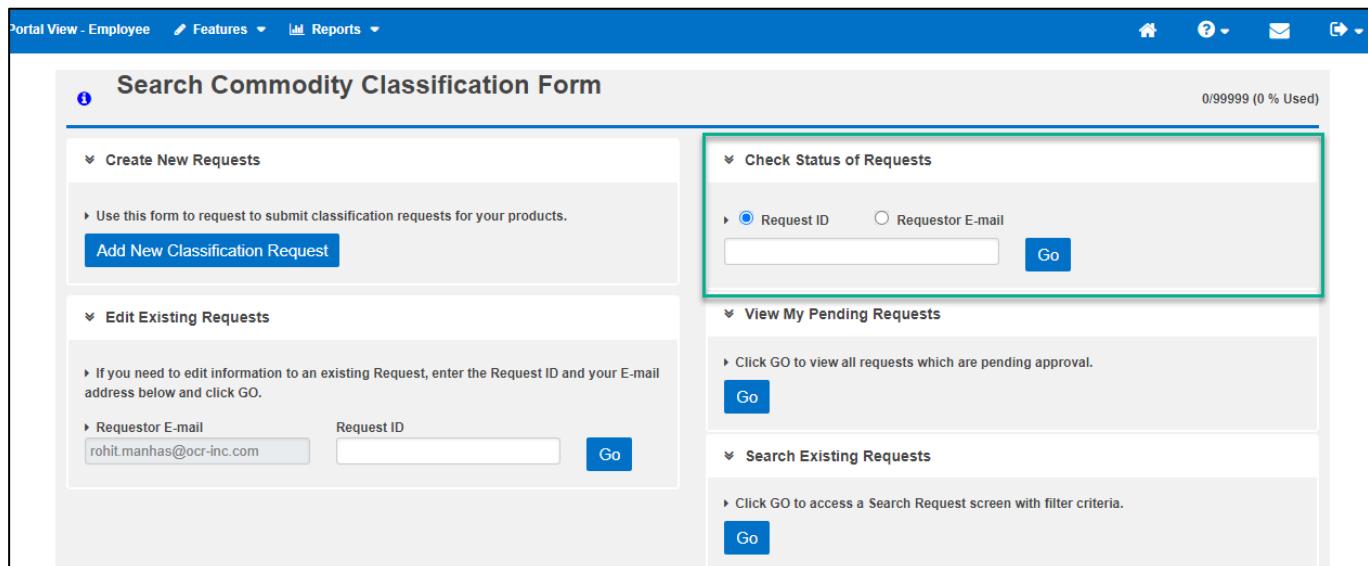
*Figure 22: Edit Existing Requests Option*

### 3.3 Check Status of Request

After Portal Users have completed the Request form and submitted it off for Review, they can return to the **Compliance Portal** to check the status of their pending Requests.

Under the **Check Status of Requests** block, the Portal Users can provide relative information to the Request to generate a result list or view a particular case.

**Navigation:** Commodity Classification Form -> Check Status of Requests



The screenshot shows the 'Search Commodity Classification Form' page. The 'Check Status of Requests' block is highlighted with a green box. This block contains radio buttons for 'Request ID' (selected) and 'Requestor E-mail', and a 'Go' button.

**Figure 23: Check Status of Request Option**

 User would be able to search for a specific request by using the Request ID option (or) Use search for all requests created by the requestor using the email ID and click Go button.

1. A page displaying the details of the classification request would be displayed as shown below.

**Commodity Classification Request Status**

**Request Details**

Request ID	CR2-210519-016	Request Date	19/May/2021	SBU	IMPDM
Requestor Name	ARN1 Classification Reviewer (IE) Rocky	Requestor Email	rjoseph@ocr-inc.com	Requestor Phone	
Submitted Date		Need By Date		Final Action Date	19/May/2021
Form Status	Classification Completed	Export Classification Status	Export Classification Completed	Import Classification Status	

**Reviewer Details**

Reviewer Type	Name	Email ID	Phone Number
Jurisdiction & classification Reviewer	ARN1 Classification Reviewer (IE) Rocky	rjoseph@ocr-inc.com	301-208-0700 x 120
Export Control Reviewer	ARN1 Classification Reviewer (IE) Rocky	rjoseph@ocr-inc.com	301-208-0700 x 120

**Commodity Details**

Part No	Part Description	Country of Classification	Export Classification	Regime Details	Import Classification	Statistical Classification
D01-PART-B2	ARN1 - D01-PART-B2	UNITED STATES	1A002.b			
D01-PART-A2	ARN1 - D01-PART-A2	UNITED STATES	1A002.b			

**Related Requests**

Request ID	Status	Part Number	Classification Type & Country
CR2-210519-016	Classification Completed	D01-PART-A2, D01-PART-B2	Export Classification: US
CR2-210519-016-SR0001	Review In Progress	D01-PART-C2	Export Classification: US
CR2-210519-016-SR0002	Review In Progress	D01- PART-E2, D01-PART-D2	Export Classification: US
CR2-210519-016-SR0003	Review In Progress	D01- PART-E2, D01-PART-A2, D01-PART-B2, D01-PART-C2, D01-PART-D2	Import Classification: US
CR2-210519-016-SR0004	Review In Progress	D01- PART-E2, D01-PART-A2, D01-PART-B2, D01-PART-C2, D01-PART-D2	Import Classification: CA
CR2-210519-016-SR0005	Review In Progress	D01- PART-E2, D01-PART-A2, D01-PART-B2, D01-PART-C2, D01-PART-D2	Import Classification: GB
CR2-210519-016-SR0006	Review In Progress	D01- PART-E2, D01-PART-A2, D01-PART-B2, D01-PART-C2, D01-PART-D2	Import Classification: EU

**Figure 23: EAES Compliance Portal Check Status of Request**

 Classification determined by country for each commodity in the request would be displayed in the Commodity Details grid.

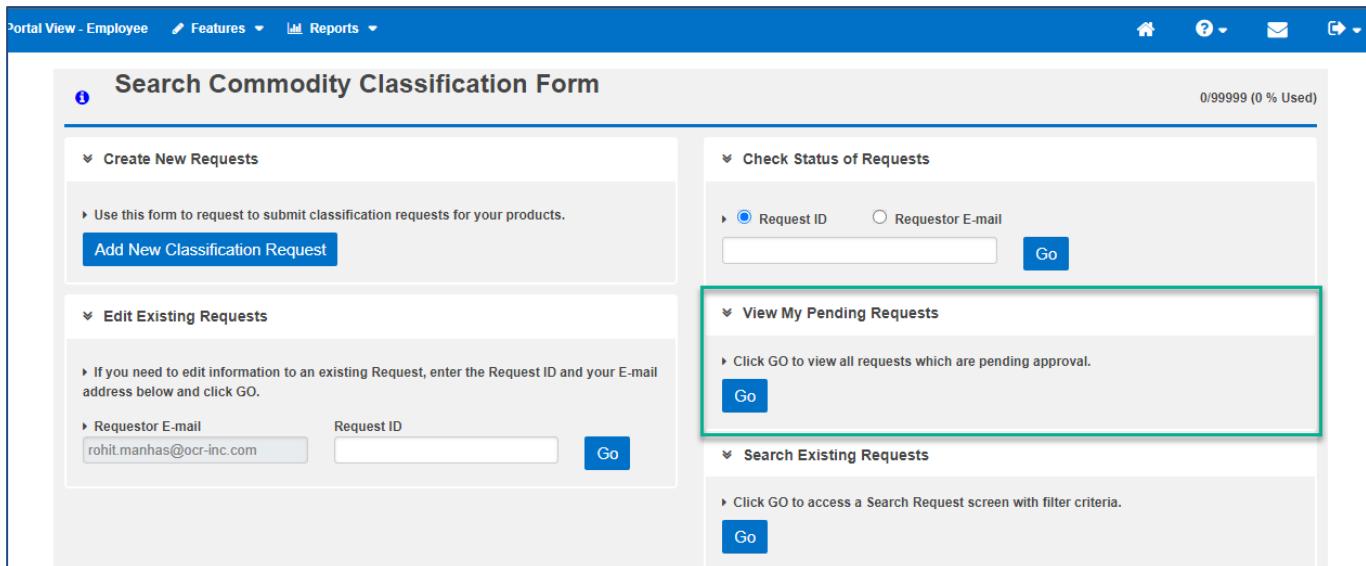
 Users would be able to view status details of each related request, and explore more details by using the hyperlink on the Request ID field.

 PDF icon would allow users to download and view more details on the classification process.

### 3.4 View My Pending Requests

This section describes the steps to view your pending requests. Under the **View My Pending Requests** block, the Portal Users can provide relative information to the Request which are pending.

**Navigation:** Commodity Classification Form -> View My Pending Requests



The screenshot shows the 'Search Commodity Classification Form' page. The 'View My Pending Requests' section is highlighted with a green border. It contains the following text and button:

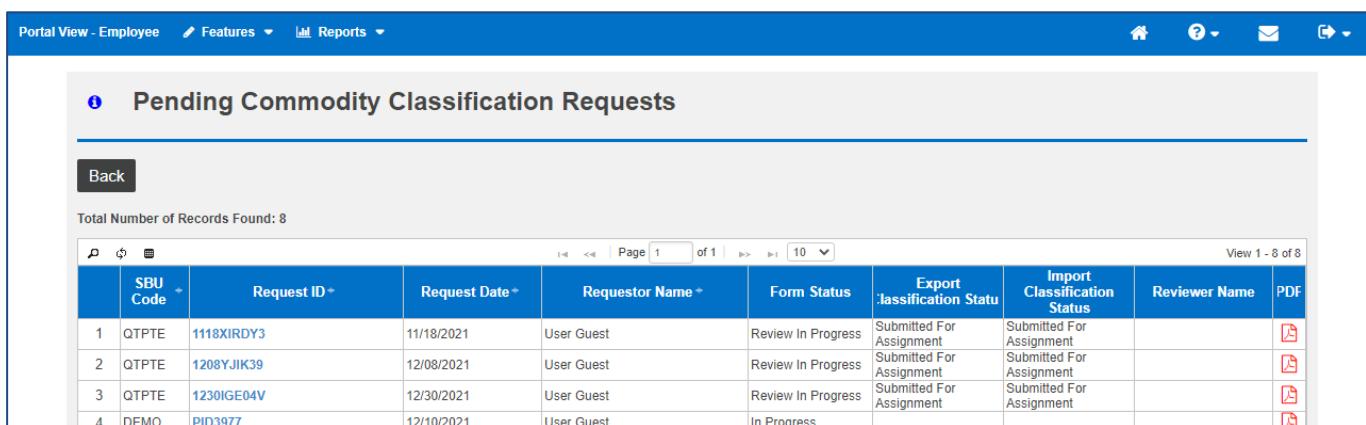
- Click GO to view all requests which are pending approval.
- Go

**Figure 24: View My Pending Requests**

Click the **Go** button to view the list of pending requests.



The Pending Commodity Classification Requests Screen is displayed



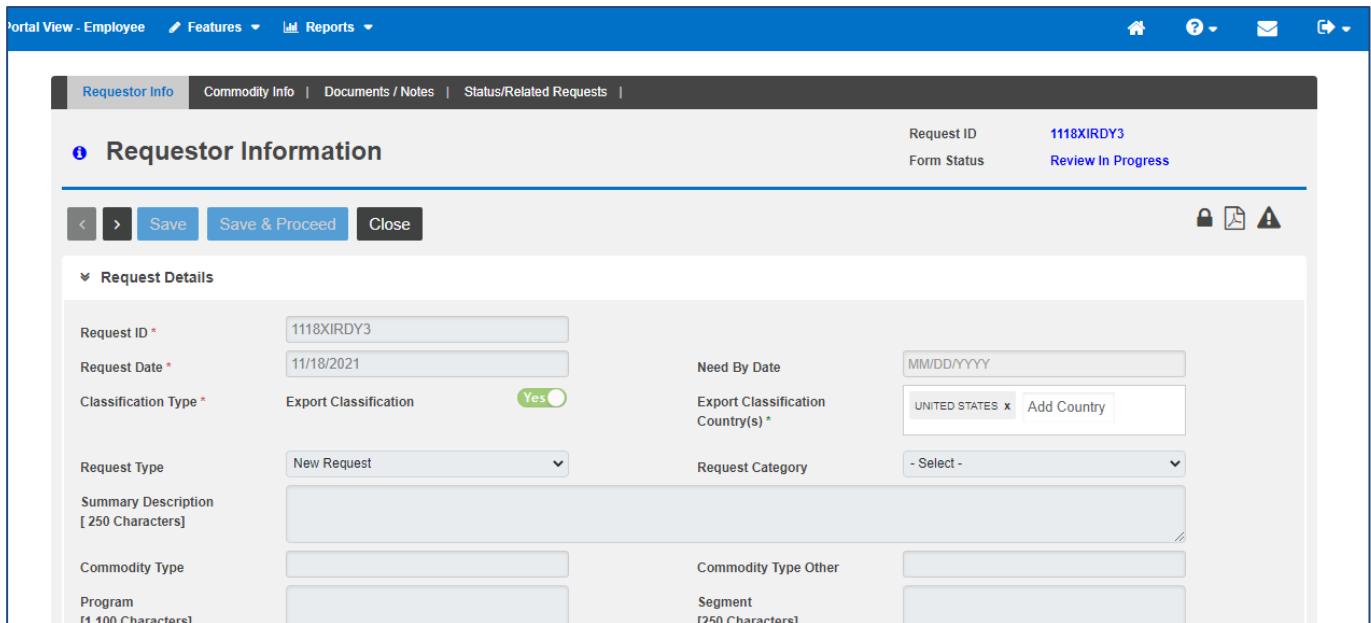
The screenshot shows the 'Pending Commodity Classification Requests' screen. It displays a table with the following data:

	SBU Code	Request ID*	Request Date*	Requestor Name*	Form Status	Export Classification Status	Import Classification Status	Reviewer Name	PDF
1	QTPTE	1118XIRDY3	11/18/2021	User Guest	Review In Progress	Submitted For Assignment	Submitted For Assignment		
2	QTPTE	1208YJIK39	12/08/2021	User Guest	Review In Progress	Submitted For Assignment	Submitted For Assignment		
3	QTPTE	1230IGE04V	12/30/2021	User Guest	Review In Progress	Submitted For Assignment	Submitted For Assignment		
4	DEMO	PID3977	12/10/2021	User Guest	In Progress				

**Figure 25: Pending Commodity Classification Requests Screen**



You can click on the Request ID to view the details of the commodity classification requests.



The screenshot shows the 'Requestor Information' page with the following details:

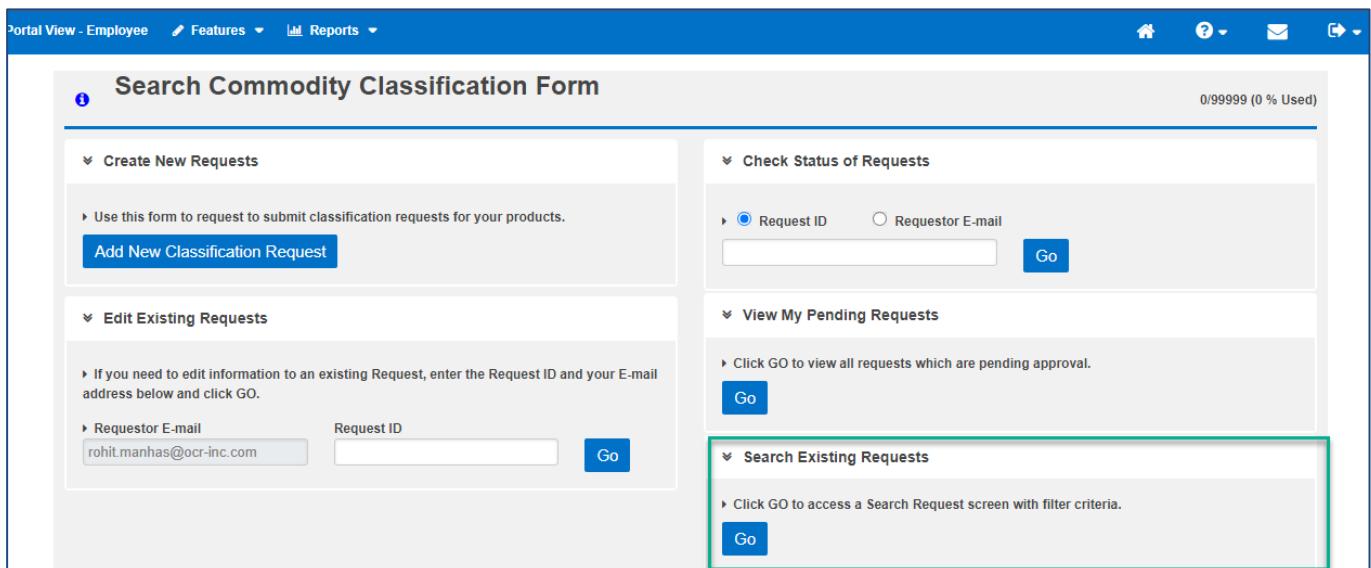
- Request ID:** 1118XIRDY3
- Form Status:** Review In Progress
- Request Details:**
  - Request ID: 1118XIRDY3
  - Request Date: 11/18/2021
  - Need By Date: MM/DD/YYYY
  - Classification Type: Export Classification (Yes)
  - Export Classification Country(s): UNITED STATES x Add Country
  - Request Type: New Request
  - Request Category: - Select -
  - Summary Description: [ 250 Characters]
  - Commodity Type: [Input Field]
  - Commodity Type Other: [Input Field]
  - Program: [Input Field]
  - Segment: [ 250 Characters]

Figure 26: Request Details

### 3.5 Search Existing Requests

This section describes the steps to search, view and edit the details of the requests. Under the **Search Existing Request** block, the Portal Users can provide search parameters to narrow down the results and view the details of the request.

**Navigation:** Commodity Classification Form -> Search Existing Request



The screenshot shows the 'Search Commodity Classification Form' page with the following sections:

- Create New Requests:** Use this form to request to submit classification requests for your products. **Add New Classification Request** button.
- Edit Existing Requests:** If you need to edit information to an existing Request, enter the Request ID and your E-mail address below and click GO. **Requestor E-mail:** rohit.manhas@ocr-inc.com, **Request ID:** [Input Field], **Go** button.
- Check Status of Requests:** Request ID or Requestor E-mail input fields, **Go** button.
- View My Pending Requests:** Click GO to view all requests which are pending approval. **Go** button.
- Search Existing Requests:** Click GO to access a Search Request screen with filter criteria. **Go** button. This section is highlighted with a green border.

Figure 27: Search Existing Request

Click the **Go** button to search the requests.



The Search Commodity Classification Request Screen is displayed

Portal View - Employee   Features   Reports

### Search Commodity Classification Request

0/99999 (0 % Used)

Search   Reset   Add New Classification Request

Request Details

SBU Code	-All-	Request ID		
Status	-All-	Requestor Name		
Classification Type	- Select -	Request Date Between	MM/DD/YYYY	MM/DD/YYYY
Export Classification Country			Import Classification Country	
Request Category	- Select -	Commodity Type		
Program			Segment	
Site			Region	

Figure 28: Search Commodity Classification Request Screen

- On the **Search Commodity Classification Request** screen, enter the search parameters in the available fields and click the **Search** button.



The Result Commodity Classification Request screen is displayed.

Portal View - Employee   Features   Reports

### Result Commodity Classification Request

New Search   Add New Classification Request

Total Number of Records Found: 278

Request ID	Request Date	Requestor Name	Export Classification Country	Import Classification Country	Flag Reason	Export Classification Reviewer Name	Export Classification Status	Import Classification Reviewer Name	Import Classification Status	Form Status	SBU Code	Action			
1 CCL-SJSON-011_TEST927	02/07/2022	SK			Flag Reason	Administrator OCRADMIN				In Progress	DEMO				
2 PID3985	02/04/2022	User Guest	US	US	Flag Reason					Cancelled	DEMO				
3 PID3984	02/04/2022	User Guest	US	US	Flag Reason					In Progress	DEMO				
4 PID3983	02/04/2022	User Guest	US	US	Flag Reason					In Progress	DEMO				
5 PID3982	02/04/2022	User Guest	US	US	Flag Reason					In Progress	DEMO				
6 CCL-SJSON-nnn01	02/04/2022	SK			Flag Reason	Administrator OCRADMIN				In Progress	DEMO				
7 CCL-SJSON-01	01/18/2022	SK			Flag Reason	Administrator OCRADMIN				In Progress	DEMO				
8 PID3986	02/04/2022	Administrator	US	US	Flag Reason					In Progress	DEMO				

Figure 29: Result Commodity Classification Request Screen

- In the search result table, under the **Request ID** column, click the desired number to view the details.



The request details are displayed.

Portal View - Employee    

Requestor Info   Commodity Info | Documents / Notes | Submit Request |

**Requestor Information**

Request ID: CCL-SJSON-Nnn01  
Form Status: In Progress

**Information!**

- This request has been branched for classification review, please navigate to Status/Related Requests tab for additional details.

**Request Details**

Request ID *	CCL-SJSON-nnn01		
Request Date *	02/04/2022	Need By Date	03/20/2018
Classification Type *	Export Classification 	Export Classification Country(s) *	UNITED STATES
	Import Classification 	Import Classification Country(s) *	UNITED STATES
Request Type	New Request	Request Category	Internal
Summary Description [ 238 Characters ]	Summary desc		

**Figure 30: Request Details**

## 4. REPORTS

This section describes how to generate reports to keep an efficient log of your screenings with summary details and internal tracking.

The following are the list of available report categories.

- Adhoc Report
- Metrics Report

 *Procedure to generate all reports is the same, this section gives an example to generate Adhoc report.*

### 4.1 Adhoc Report

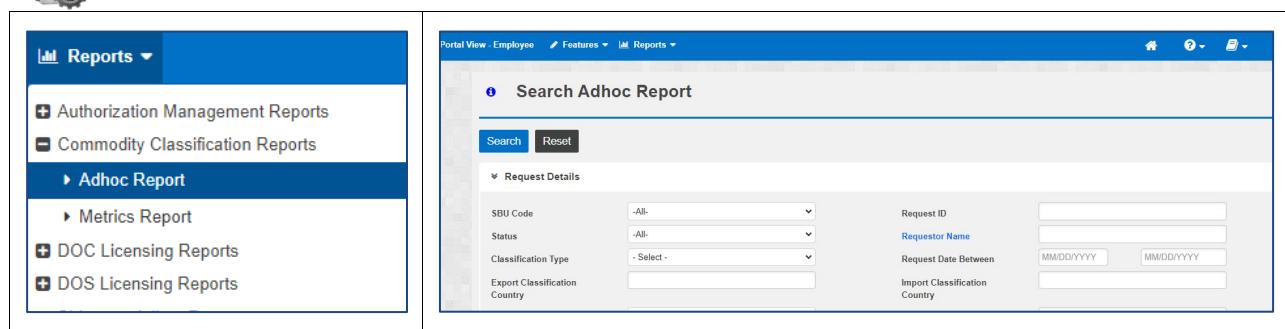
The Adhoc Report provides a high-level overview of the details for a Product Classification Request. The requestor, reviewers, commodity type and part number details associated with the particular Request ID are displayed in the report.

The following steps describe how to generate Adhoc report.

1. To generate a report, you need to first view the **Search Adhoc Report** screen successfully. This can be achieved by the following:
  - a. Navigating to the **Adhoc Report** option in **Reports of Commodity Classification** module (Reports -> Commodity Classification Reports -> Adhoc Report).



The Search Adhoc Report screen is displayed.



*Figure 31: Search Adhoc Report Screen Navigation*



You can also search the required option from the Search Bar provided in the Reports Menu drop-down list.



At any given time while you are on the screen, you can click the **Reset** button to reset the fields to their default values.

2. In the **Search Adhoc Report** screen, select the required SBU from **SBU Code** drop-down list. Enter the search parameters based on the Reviewers, item/rating details, status, screening dates, etc. and click the **Search** button.



*The date format is DD/MMM/YYYY.*



The Product Classification Adhoc Report screen is displayed.

Commodity Classification Adhoc Report											
         Page 1/364											
<b>SEARCH CRITERIA</b> SBU Code : DEMO Status : All Date: 07-23-2021 Time: 08:38:28 AM											
Request ID	Date Initiated	Item No	Part Number	Manuf. Part No	Model No	National Stock Number	Product Name	Part Description	Program	Segment	Comm
PID1020		1473	0009					Migrated part from custom section			BASE ARTICLE ME
PID3578		2091	0053308HA					Migrated part from custom section			

**Figure 32: Product Classification Adhoc Report Screen**



*The total number of records, search criteria, and a report generated with the date and time are displayed above the table.*



The total number of Classification Completed, Pending Reviews, In progress, Re-work and Cancel Request ID are displayed above the table.



You can export the report to '.xls' or '.pdf' file by clicking  or  button, respectively.

3. Click the  icon to generate a new report.

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AUTOMATING THE PROCESS IS OURS