

Original Formulation Instructions

1. Create the Submission

-Use either the 'Create New Submission' button or the 'Copy Submission' drop down menu and button to create a new submission.

New Submission	<input type="button" value="Create New Submission"/>	Submission ID will Automatically be Assigned
Copy Submission Select a Submission <input type="button" value="v"/>	<input type="button" value="Copy Submission"/>	Submission ID will Automatically be Assigned

- Select 'Original Formulation' from the 'Application Type' drop down menu.
- Select 'dexos1_Gen2', 'dexosD', or 'dexos1_Gen3' from the Fluid Type drop down menu.
- Select a Viscosity Grade.

*Required Fields

Submission ID	TBD	Company	TMC
Application Type*	Select application type <input type="button" value="v"/>	License Region (Blenders & Rebranders)	Select region <input type="button" value="v"/> Other: <input type="text"/>
Fluid Type*	Select fluid type <input type="button" value="v"/>	Are you presently a Tier 1 engine oil supplier to GM (Blenders & Brand)	Select Y or N <input type="button" value="v"/>
Viscosity Grade*	<input type="text"/>		

-Fill out the formulation information.

Original Formulators Information			
Applicant's Company*	TMC	Applicant's Formulation Code*	<input type="text"/>
Formulation Type*	<input checked="" type="radio"/> Core Formulation (?)		
Description*	<input type="text"/>		

- The application form contact information will be automatically populated from the user account.
- Fill any other specification information, if applicable.
- Click 'Save & Continue' to create the new submission record.

<small>Other specification approvals for this formulation</small>	
ACEA	<input type="text"/>
ILSAC & API	<input type="text"/>
OEM	<input type="text"/>
Others	<input type="text"/>
<input type="button" value="Save & Continue"/>	<input type="button" value="Cancel"/>

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2. Upload GM Approved Test Plan

NOTE: This step only applies to dexos1_Gen3 original formulation submissions. For dexos1_Gen2 or dexosD submission, proceed to Step 3.

-The newly created submission will show in purple on the Initial Sponsor Screen with a status of 'Pending – Test Plan Upload'.

-Click 'Select' to be taken to the submission dashboard.

Submission Status	Pending	Submitted to TMC	Pending - Test Plan	Correction Requested	Submitted to GM	Approved	Rejected	Suspended	All
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Existing Submissions											
	Applicant's Formulation	ID	Submitter Company	Licensee	License Number	Description	Application Type	Expiration Date	Fluid Type	Status	Approval Date
Select	Alpha1	5883	TMC			Alpha Test Formulation	OriginalFormulation		dexos1_Gen3	Pending	
Select	2Alpha	6856	TMC			2Alpha	OriginalFormulation		dexos1_Gen3	Pending	
Select	Alpha1a	7856	TMC			Alpha1a	OriginalFormulation		dexos1_Gen3	Pending - Test Plan Upload	

-Upload a cover letter.

-Upload a GM-approved test plan. Note, formulator's are expected to receive test plan approval prior to starting work on a submission, other the submission might be rejected.

Submission Dashboard

Item	#Items	Action	Last Save Date	Comment	
Application Form	1	<input type="button" value="Edit"/>	2/23/2021 1:48:39 PM	<input type="button" value="Comment"/>	
Cover Letter					
File To Upload: <input type="button" value="Browse..."/> No file selected.		<input type="button" value="Upload"/>			
Formulation Use Authorization	Formulation Code	Authorized	Authorized Date	Item Status	Comment
Comment Count: 0	<input type="button" value="View Comments"/>				
Test Plan					
File To Upload(.pdf only): <input type="button" value="Browse..."/> No file selected.		<input type="button" value="Upload"/>			
Filename	Test Plan Status	Date Submitted	Date Approved/Rejected	View/Remove file	Comment on file
dexos@ Gen3 Test Plan Template					

-After uploading the test plan, toggle the 'Submit Test Plan' radio button and click 'Submit'.

Entire Packet Action	Comment
<input checked="" type="radio"/> Submit Test Plan	<input type="text"/>
<input type="button" value="Submit"/>	

- The submission will show in purple on the Initial Sponsor Screen with a status of 'Pending – Test Plan Review'. GM will review the test plan and either accept or reject the test plan. Once accepted, the submission proceeds to Step 3.

Existing Submissions											
	Applicant's Formulation	ID	Submitter Company	Licensee	License Number	Description	Application Type	Expiration Date	Fluid Type	Status	Approval Date
Select	Alpha1a	7856	TMC			Alpha1a	OriginalFormulation		dexos1_Gen3	Pending - Test Plan Review	

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3. Submission Data Entry/Upload

-Once a submission's status is 'pending' then it can be selected for data entry/upload.

Existing Submissions											
	Applicant's Formulation	ID	Submitter Company	Licensee	License Number	Description	Application Type	Expiration Date	Fluid Type	Status	Approval Date
Select	Alpha1	5883	TMC			Alpha Test Formulation	OriginalFormulation		dexos1_Gen3	Pending	

-This will take you to the Dashboard Screen where you can enter all the submission data. Click on 'Show/Hide' to expand or collapse items as necessary to navigate the dashboard.

-Engine Test Data & Reports needs to be entered before the other items can be completed.

-Dashboard items can be saved and returned to for later login sessions. Multiple users within a company can edit a pending submission. **Simultaneous multiple users editing and saving a submission could cause errors.**

Submission Dashboard Audit Sample

Item	#Items	Action	Last Save Date	Comment	
Application Form	1	Edit	2/5/2021 12:58:18 PM	Comment	
Cover Letter					
File To Upload: Browse... No file selected. Upload					
Formulation Use Authorization	Formulation Code	Authorized	Authorized Date	Item Status	Comment
Comment Count: 2	View Comments				

Test Plan					
File To Upload(.pdf only): Browse... No file selected. Upload					
Filename	Test Plan Status	Date Submitted	Date Approved/Rejected	View/Remove file	Comment on file
gen3_test_plan_20210205125937.pdf	Approved	2/5/2021 12:59:44 PM	2/5/2021 1:00:25 PM	View File	Comment
dexos@ Gen3 Test Plan Template					

[\(Show All/Hide All\)](#)

Select Engine Test Data & Reports [\(show/hide\)](#)

* = Must be run on Final Formulation

Elastomer Test Data [\(show/hide\)](#)

Composition Information Composition Comparison [\(show/hide\)](#)

BOI/VGRA [\(show/hide\)](#)

Formulation Test History [\(show/hide\)](#)

Applicant Entered Analytical Data Set 1 on Final Formulation [\(show/hide\)](#)

Applicant Entered Analytical Data Set 2 on Final Formulation [\(show/hide\)](#)

Supplemental Document Information, GM Allowances, Label Artwork, Affidavit, etc. (.pdf only) [\(show/hide\)](#)

Samples Shipped for Analysis [\(show/hide\)](#)

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4. Logging of Oil Samples

Note: a 1-gallon sample (please use an F-style can) of the formulation needs to be logged on the dashboard and sent to the TMC for analysis. Use the sample label provided by the website to ensure proper identification and ship to the TMC at the address specified on the label.

-Click 'Log Sample'

Samples Shipped for Analysis ([show/hide](#))

		<input type="button" value="Log Sample"/>		<input type="button" value="Sample Analytical"/>			
Batch #	Date Shipped	Date Received by TMC	Date Shipped to GM	Sample ID	TMC Status/GM Status	Reprint Label	Comment

-Fill out the requested information.

-Click 'Save and Print'. This will produce a pdf label; download the label to be used with the sample shipment.

Sample Shipment Info

Please print the packing list and shipping label. Attach the printing label to the sample drum and include the packing list with the package. Any tracking information that you can supply to the TMC is appreciated.

Production Facility	Location	Sample Designation
<input type="text"/>	<input type="text"/>	Original Formulation <input type="button" value="v"/>
<input type="button" value="Save and Print"/> <input type="button" value="Cancel"/>		

5. Submit for Approval

For an original formulation to be reviewed, after entering all data and providing a sample, you must submit the formulation for approval. Submissions left in a 'pending' or 'correction requested' status will not be reviewed.

-Toggle the 'Submit for Approval' radio button

-Click 'Submit'

Entire Packet Action	Comment
<input type="radio"/> Submit For Approval	<input type="text"/>
<input type="radio"/> Expunge	<input type="text"/>
<input type="button" value="Submit"/>	

-The submission will now have a status of 'Submitted to TMC'.

-The TMC will review the submission and analyze the sample. You will be contacted if any corrections are required. Once the submission is in order, the TMC will submit to GM for review.

Submission Status	Pending	Submitted to TMC	Pending - Test Plan	Correction Requested	Submitted to GM	Approved	Rejected	Suspended	All		
Existing Submissions											
Select	Applicant's Formulation	ID	Submitter Company	Licensee	License Number	Description	Application Type	Expiration Date	Fluid Type	Status	Approval Date
<input type="checkbox"/>	Alpha1	5883	TMC			Alpha Test Formulation	OriginalFormulation		dexos1_Gen3	Submitted to TMC	