

EPC & PROCUREMENT TOOL

Industrial Valve Project Document Checklist

Define document scope, submission stage and approval status before the purchase order is released.

Recommended document workflow

01	RFQ	Buyer issues datasheet, valve list, project specification and required document register.
02	Technical offer	Supplier identifies compliance, deviations, proposed materials, testing and document deliverables.
03	Pre-manufacture	Datasheets, drawings and ITP/QAP are approved to the agreed status before production starts.
04	Inspection	Witness/hold points are notified and test or inspection records are completed against the approved plan.
05	Final dossier	Required certificates, reports, manuals and release documents are compiled before shipment.

A. Technical submittals

	CHECK	DECISION / EVIDENCE
01	Valve datasheet / technical schedule	Buyer approval status and revision controlled.
02	General arrangement / dimensional drawing	Include principal dimensions, weight, end details and operation envelope.
03	Sectional drawing / bill of materials	Provide when required by the purchase specification.
04	Actuator and accessory data	Power supply, torque/thrust, fail action, switches, solenoids and interface details.

B. Quality planning

	CHECK	DECISION / EVIDENCE
01	Inspection and Test Plan (ITP)	Identify review, witness and hold points, responsibility and records.
02	Quality plan / manufacturing procedure	Provide only when required by contract or project quality plan.
03	Welding and NDE procedures	Applicable to pressure-containing welds or repair scope when contractually required.
04	Coating / preservation procedure	Define surface preparation, coating system, DFT, color and packing preservation.

C. Final manufacturing record

	CHECK	DECISION / EVIDENCE
01	Material certificates and traceability	Certificate type and linkage to heat numbers defined by order requirements.
02	Pressure, leakage and functional test reports	Record test standard, conditions, acceptance and valve identification.
03	Dimensional and visual inspection report	Include measured items required by the ITP or datasheet.
04	NDE / PMI / hardness / impact / corrosion records	Include only for the approved and applicable scope.
05	Coating inspection report	Record surface preparation, DFT and visual acceptance when applicable.
06	Certificate of Conformity / Compliance	Reference purchase order and applicable specifications.

D. Shipment and handover

	CHECK	DECISION / EVIDENCE
01	Installation, Operation and Maintenance manual	Include storage, lifting, installation, operation and maintenance guidance where required.
02	Packing list	Match valve tag, quantity, package number, gross/net weight and dimensions.
03	Nameplate, marking and packing photographs	Provide where buyer requires pre-shipment evidence.
04	Inspection release note / third-party report	Only when inspection scope includes formal release.
05	Commercial and transport documents	Invoice, country-of-origin or transport documents as agreed commercially.

Accuracy rule

A document should only be listed as included when it is part of the agreed purchase-order scope. Project-specific certificates and test reports must be generated from the actual manufactured valves and inspection results; they must never be pre-filled as generic evidence.

Reference sources

<https://www.vornetvalve.com/>

<https://www.vornetvalve.com/selection-guide/>

<https://www.vornetvalve.com/industrial-valve-materials-trim-equivalents-selection-guide/>

<https://www.vornetvalve.com/valve-trim-materials-guide/>

<https://www.vornetvalve.com/why-vornet/#documentation>