

DOCUMENTATION GUIDE

Quality & Shipment Documentation Guide

What industrial valve buyers can request, when to request it, and what each record should demonstrate.

Important

This guide is not a certificate, test report or inspection release. It describes document types that may be agreed for an order. Actual records must identify the manufactured valve, purchase order and applicable acceptance criteria.

1. Material and traceability records

DOCUMENT	PURPOSE / CONTROL POINT
Material certificate	Identifies material specification, heat number and reported chemical/mechanical results. Certificate type must be stated in the order.
Traceability list	Links valve body, bonnet, closure and other specified components to heat numbers and supporting certificates.
PMI / hardness / impact / corrosion test report	Included only when the approved specification requires the test and defines acceptance criteria.

2. Inspection and test records

DOCUMENT	PURPOSE / CONTROL POINT
Pressure and leakage test report	Records valve identification, test standard, shell/seal test conditions, duration and result.
Dimensional inspection report	Records the agreed critical dimensions against the approved drawing or dimensional standard.
Visual and marking inspection	Confirms visible condition, flow arrow, nameplate data, tag marking and external finish.
NDE report	RT, UT, MT or PT report for the approved scope, including procedure, acceptance criteria and examiner details.
Coating inspection report	Records surface preparation, coating system, dry-film thickness and visual acceptance where applicable.

3. Compliance and release

DOCUMENT	PURPOSE / CONTROL POINT
Certificate of Conformity / Compliance	States that supplied items conform to the referenced order and agreed specification; it does not replace underlying test records.
Inspection release note	Documents release after agreed inspections are complete. Third-party release applies only when contracted.
Final document index	Lists the final dossier contents, document numbers and revisions for audit and handover.

4. Packing and shipment

DOCUMENT	PURPOSE / CONTROL POINT
Packing list	Identifies packages, valve tags, quantities, weights and dimensions for receipt and customs handling.
Packing and marking photographs	Shows protection, end covers, crate condition, package marking and nameplate/tag visibility.
Storage and preservation instructions	States dry storage, protective cover, periodic inspection and actuator preservation needs when applicable.
Commercial / transport documents	Invoice, transport document and origin documentation are supplied as agreed under the commercial terms.

Recommended request wording

Use clear wording in the RFQ or purchase order so the document scope can be priced and planned before manufacture.

SUBJECT	SAMPLE CONTRACT WORDING
Material records	Provide the agreed material certificates and a traceability list linking specified pressure-containing and trim components to heat numbers.
Testing	Provide valve-specific pressure and leakage test reports to the specified test standard and acceptance criteria.
Inspection	Submit the proposed ITP with buyer review, witness and hold points identified before manufacture.
NDE / special tests	Perform and document only the NDE or special material tests defined in the approved specification, with applicable procedures and acceptance criteria.
Final dossier	Submit one indexed electronic manufacturing record book before shipment or within the agreed handover period.
Packing evidence	Provide package, end-protection, marking and nameplate photographs before dispatch when required.

What not to do

	CHECK	DECISION / EVIDENCE
01	Do not treat a sample report as evidence for a delivered valve	Records must identify the actual valve and manufacturing results.
02	Do not add certificate requirements after manufacture without review	Late requirements may be impossible to recreate or may affect schedule and cost.
03	Do not specify NDE or special tests without scope and acceptance criteria	The method, extent, stage and acceptance basis must be defined.
04	Do not assume third-party inspection is included	Agency, hold points, notice and cost must be agreed.

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>