Supplier Manual for Performance Monitor

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Table of contents

LuK INA FAG

Agenda

SCHAEFFLER

1	**Introduction**
2	**First Steps with SupplyOn Performance Monitor**
3	**Working with Performance Monitor**
4	**Summary and Support**

Supplier Manual for Performance Monitor

LuK INA FAG

SCHAEFFLER

Agenda

1	Introduction

| 1 | Performance Monitor – Process Overview |
| 2 | Your Benefits |

Supplier Manual for Performance Monitor

LuK INA FAG

Agenda

1 **Introduction**

1 **Performance Monitor – Process Overview**

2 **Your Benefits**

① **Performance Monitor – Process Overview**

Performance Monitor is a powerful tool for identifying potential improvements

Performance Monitor - what is it?

SupplyOn Performance Monitor allows suppliers to access and analyze their customer´s ratings in a standardized and structured form. SupplyOn Performance Monitor is connected to the participating buying companies´ system, from where it regularly receives updated supplier ratings.

Each buying company can use own evaluation categories (e.g. quality, logistics, procurement). Based on this data, Performance Monitor allows suppliers to view their supplier ratings from multiple customers in a standardized format within one unified, easy-to-use system.

① **Performance Monitor – Process Overview**

**As a first step Schaeffler rates your performance**

| Customer generates ratings | Transmission of the ratings to SupplyOn | Access to the ratings for the supplier available |

	Supplier 1	Supplier 2
Quality	95	81
Logistics	64	73
Procure-ment	100	99
Etc.		

☞ The ratings are usually done automatically in the buyer´s IT system, e.g. based on existing complaints and goods receipts transactions.
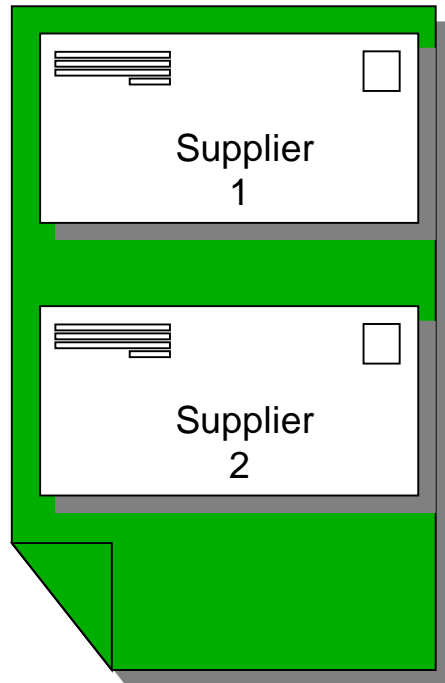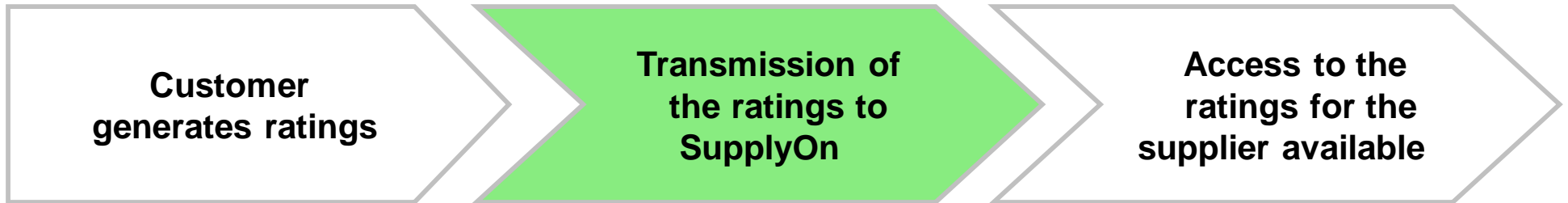
① **Performance Monitor – Process Overview**

Finally, the supplier has the view on the ratings and can make analysis on this basis

Customer generates ratings	Transmission of the ratings to SupplyOn	Access to the ratings for the supplier available

☞ Suppliers receive an **e-mail notification** when new/updated ratings for their company is available.

☞ You can pull additional reports or detail data, e.g. to analyze the causes of an insufficient rating. You also can download the complete rating as a pdf-file.

① **Performance Monitor – Process Overview**

It depends on your preferences and those of your customer to whom and when E-Mail notifications are sent

☞ E-mails will be sent separately for each buying company offering ratings, to all Performance Monitor users of the corresponding suppliers, who are assigned as customer responsible for this customer.

☞ Suppliers can also receive e-mails including special alerts, if the new data contains at least one "traffic light" of a certain color (e.g. "red"). The traffic light color for activating the special alert e-mail depends on the definition defined from each buying company.

☞ In addition, suppliers may receive reminder e-mails, if no user from the supplier has viewed the ratings for a certain time. The time interval and the amount of reminders can be determined by the customer.

SCHAEFFLER

Agenda

1 **Introduction**

1 **Performance Monitor – Process Overview**

2 **Your Benefits**

Supplier Manual for Performance Monitor

LuK INA FAG

② **Your Benefits as a Supplier Company**

You profit by several advantages of electronic supplier assessments

☞ **The SupplyOn Performance Monitor constantly provides you with information of how your customers assess your performance.**

» The Performance Monitor shows key performance figures such as product quality and delivery reliability from the group level down to the part level. You are given a differentiated view of your customers' overall assessment of your services and have access to up-to-date assessment data at all times.

» In the event of a negative assessment, this is made transparent with the Performance Monitor.

» The consolidated assessment provides transparency regarding your actual quality status.

☞ **Performance Monitor data can be evaluated in a number of different ways.**

» Various analysis options assist you in identifying possible areas of weakness quickly.

» The graphical history view illustrates the development of your services in the past.

☞ **The Performance Monitor is a management tool which allows you to increase your competitiveness on a sustainable basis.**

Agenda

SCHAEFFLER

1	Introduction
2	**First Steps with SupplyOn Performance Monitor**
3	Working with Performance Monitor
4	Summary and Support

Supplier Manual for Performance Monitor

Agenda

SCHAEFFLER

| **2** | **First Steps with SupplyOn Performance Monitor** |

1	**Technical Requirements**
2	**Starting Performance Monitor**
3	**Roles and Rights**

LuK INA FAG

Agenda

2   **First Steps with SupplyOn Performance Monitor**

1   **Technical Requirements**

2   Starting Performance Monitor

3   Roles and Rights

Before you can begin working with SupplyOn Performance Monitor, the following prequisities must be fullfilled

☞ You have a computer equipped with an Internet connection

As minimum equipment we recommend:

» A Pentium computer with 500 MHz clock rate and 128 Mbytes RAM

» A monitor with a resolution at least 800 x 600 pixel and 256 colors

» An Internet connection (ISDN or modem) with a transfer rate of at least 33,600 bits/s

» A 32-bit operating system (Windows 98, 2000, XP, NT 4.0) or higher

☞ A current WWW browser is installed on your computer

» SupplyOn WebEDI was optimized and tested for Microsoft Internet Explorer as of version 6.0 or 7.0 with a screen resolution of at least 1024 x 768 pixel

» Your browser must guarantee an encryption dgree of 128 bits

» Browser configuration: Activated java script

☞ An valid E-Mail address exists, Acrobat Reader version 4.0 or higher, Firewall configuration: http & https connections via firewall must be permitted

Note: There may be deviations for other versions. However, it is important that "active scripting"is switched on.

Agenda

SCHAEFFLER

| **2** | **First Steps with SupplyOn Performance Monitor** |

Supplier Manual for Performance Monitor

Starting point for using SupplyOn Services is always the Homepage: www.SupplyOn.com

By clicking on SupplyOn for Suppliers you get forwarded to more specific supplier content

On the right hand side you can login via entering your username and password

After creating a password please pay attention to the following

After 90 days you will be asked to create a new password.
The password has to include:

☞ At least eight characters

☞ On capital letter

☞ One small letter

☞ One special character

☞ One number

After the successful login you will be forwarded to My SupplyOn. Here you can check, for which services you have access

Agenda

SCHAEFFLER

2   **First Steps with SupplyOn Performance Monitor**

1   Technical Requirements

2   Starting Performance Monitor

3   **Roles and Rights**

Supplier Manual for Performance Monitor

③ **Roles and Rights**

In order to administer company data and / or users, you need the role CompanyAdmin
After the login follow the following path to reach Master Data Administrations View:
-> Administration -> User Management

③ **Roles and Rights**

After selecting the user, choose the role you want to assign to him/her

ℹ️ Users with this role have permission to access Performance Monitor for their own company and maintain or act as substitutes. The substitute concept allows users to pass on their authorizations to other users, who act e.g. as vacation replacements.

③ **Roles and Rights**

In addition, the supplier´s SupplyOn administrator must specify the user as customer responsible (key account manager) for the respective customer.

These employees will be informed about new performance data from customers via e-mail and are able to access this data. Users with this role can maintain substitutes or act as substitutes. Only users assigned as customer responsible have access to performance data from a customer.

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③ **Roles and Rights**

The substitute concept allows you to pass on your authorizations to other users, who act e.g. as your vacation replacements

> On the first Performance Monitor page, click on the link "Act as substitute" and then on "Define my substitutes"

ⓘ Afterwards you get forwarded to the page "Change substitution settings". After having defined a substitute by clicking on "Add substitutes or by activating the checkbox of a colleague, click on "Save". To act as a substitute for a colleague you have to change your role. On the page "Act as a substitute" you have to select the role of a substitute of a certain colleague, who determined you as a substitute before.

Agenda

SCHAEFFLER

1	Introduction
2	First Steps with SupplyOn Performance Monitor
3	**Working with Performance Monitor**
4	Summary and Support

Supplier Manual for Performance Monitor

Agenda

SCHAEFFLER

3   **Working with Performance Monitor**

1   General explanation

2   Overview on the ratings

3   Details on the ratings

Supplier Manual for Performance Monitor

Agenda

SCHAEFFLER

| **3** | **Working with Performance Monitor** |

| **1** | **General explanation** |

| **2** | Overview on the ratings |

| **3** | Details on the ratings |

Supplier Manual for Performance Monitor

① **General explanation**

The Performance Monitor offers you two views on your ratings differing in the level of aggregation

Overview page	Detailed evaluation page
▪ The Overview page displays an information overview, typically consisting of differentsections with tables and charts that show a good snapshot of the performance. ▪ Single ratings are aggregated in dimensions (e.g. quality, logistics) and categories (e.g. commodities, parts) ▪ Aggregated reports are presented in history charts and radar charts (see slide 31)	▪ Initially the Performance data are displayed on the highest level of aggregation. ▪ In this view it is possible to disaggregate the evaluations. Various filter functions enable you to get the evaluation on a certain level (e.g. the ratings for a certain location related to certain parts). ▪ Finally, you even can call up single ratings.

🛈 **Note: Schaeffler is responsible for all content issues. Thus all questions regarding the content should be directed to the responsibles at Schaeffler. Contacts are given in chapter 4: „Summary and Support".**

Agenda

3   **Working with Performance Monitor**

1   General explanation

2   Overview on the ratings

3   Details on the ratings

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After having selected a customer on the initial page of Performance Monitor you get forwarded to the overview on all ratings for this customer
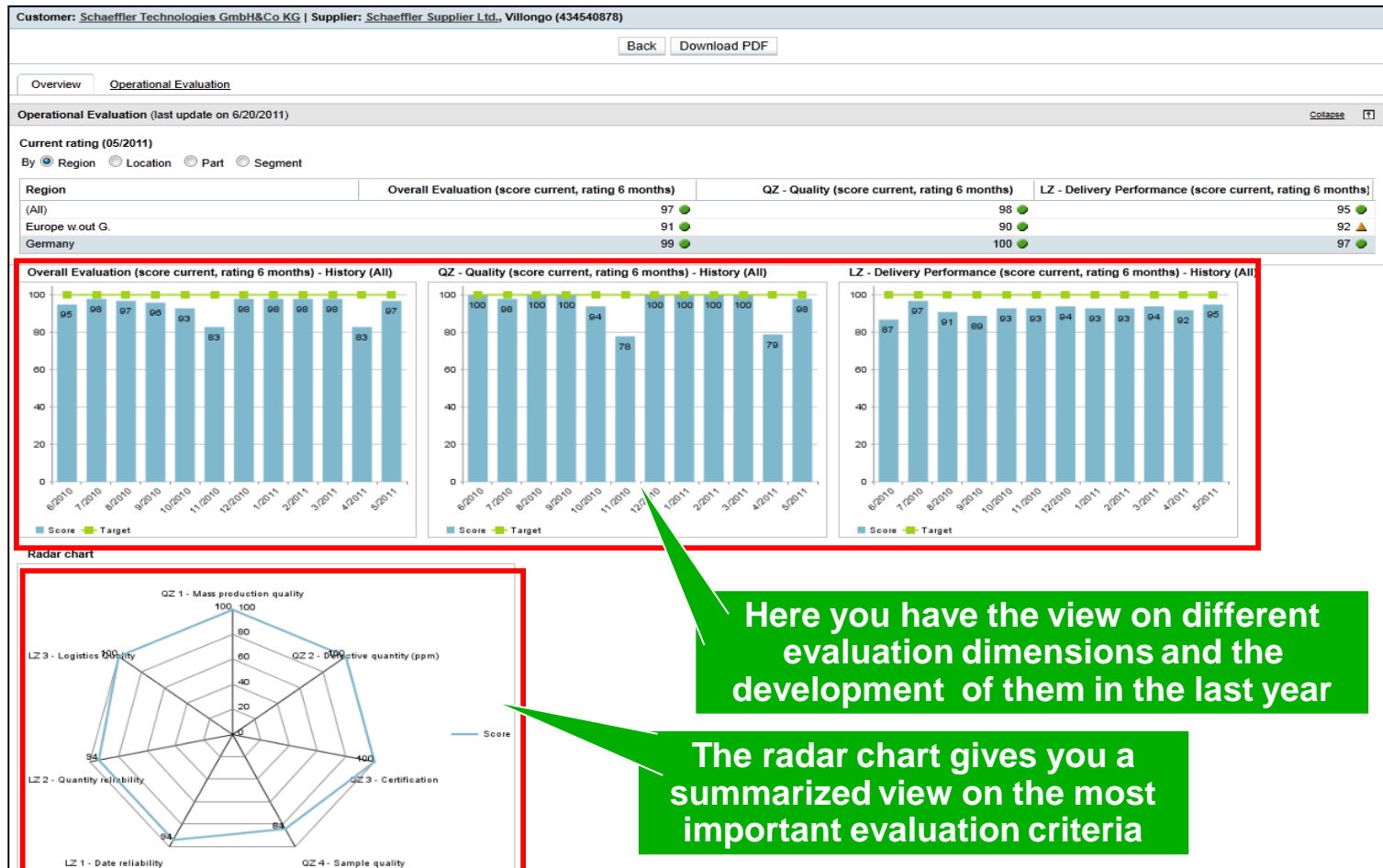
Here you have the view on different evaluation dimensions and the development of them in the last year

The radar chart gives you a summarized view on the most important evaluation criteria

② **Overview on the ratings**

It is also possible to display the ratings for the different regions, locations, parts or segments

Click here to download the rating as a pdf
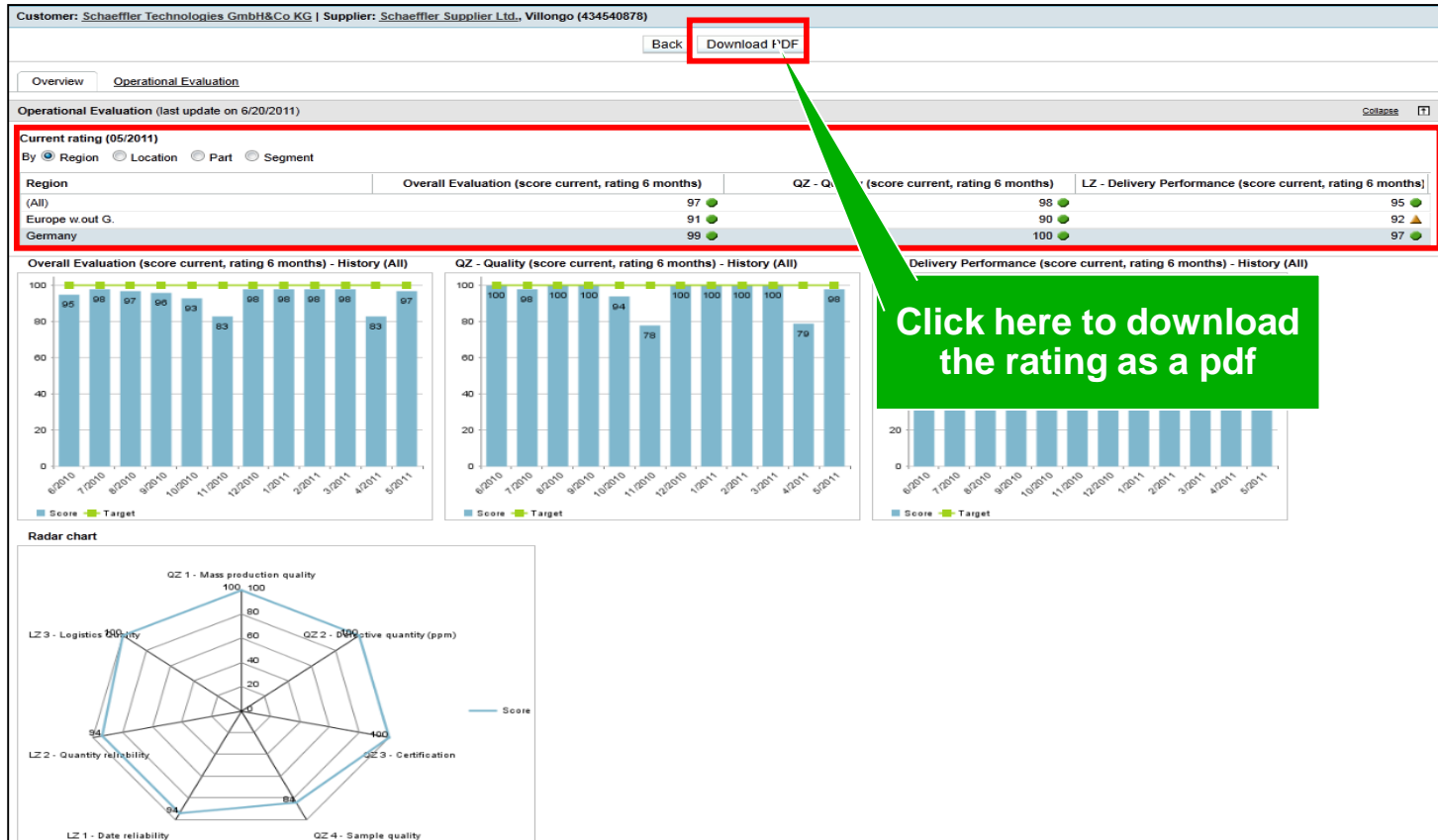
ⓘ Further information about the calculation for the dimension evaluations (e.g. quality, logistics, delivery performance) are given in the detailed view.

Agenda

3 Working with Performance Monitor

1 General explanation

2 Overview on the ratings

3 Details on the ratings

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③ Details on the ratings

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Clicking on the tab "Operational evaluation" forwards you to the detailed view on the ratings

ⓘ You can display more details for a rating. For example, if you want to see the raw data on which the rating is based, click on the link "Raw" in the column "More info".

③ Details on the ratings

If you want to open a view often you can save this view as a profile in order to save time

③ Details on the ratings

It is also possible to get a not aggregated view on single ratings

Click here to define a certain timeframe for which you want to have an overview

By choosing the option "yes" in the drop-down field "only details" you get a list of all ratings

③ **Details on the ratings**

For further analysis you can download the ratings as an excel or pdf file

ⓘ The excel table is based on the settings you made in the detailed view. In addition you can add the raw data and information about complaints.

③ **Details on the ratings**

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If you have any questions to your customer, you can send an e-mail to your customer's contact directly from Performance Monitor.

In the further informations view you can send an E-Mail with your question directly to the respective responsible of your customer. After clicking on „question to customer" a window with a new E-Mail pops up, in which you can write your question.

ⓘ In order to get forwarded to this function click on any link in the further information column in the detailed view. (Ansprechpartner?)

In the column "Further information" in the detailed view you find several links

☞ **History**

This page shows the historical values (rating, scores) of a specific performance record in a table and a diagram.

☞ **Raw data**

This page shows the raw data by which the supplier ratings are calculated (e.g. number of delivered parts, number of defective parts). Whether raw data is provided or not depends on the customer. The raw data is displayed in a line below the corresponding evaluation categories. In most cases, the table displays data for the current period, year to date (YTD) and for 12 months.

☞ **Complaints**

The customer may provide complaints that relate to supplier ratings. The complaints are listed in a table that includes the following information: complaint ID, title, type, related part ID, part name, status of the complaint, date, customer location, customer contact and defective quantity. It depends on the customer which columns are displayed.

ⓘ If you use the Service "Problem Solver" a link is visible on the complaints view in the Performance Monitor, which forwards you to a more detailed view of the complaint.

Agenda

SCHAEFFLER

1	Introduction

2	First Steps with SupplyOn Performance Monitor

3	Working with Performance Monitor

4	Summary and Support

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① **Summary**

In this session following topics were presented:

Requirerments for using SupplyOn

Technical Requirerments
Administration of roles and rights

Performance Monitor

What is it and what are your benefits
Way of working and functionalities

Supplier Manual for Performance Monitor

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① **Contacts for Support**

Please don't hesitate to contact following support points in case of questions

Schaeffler Process Responsible   Frau Henriette Solomaier

                                                    +49 (9132) 82-1821

(Herrn Müller als fachlichen Support aufnehmen?)

SupplyOn Customer Support
   regarding use of the services: **Customer-Support@SupplyOn.com**
   regarding registration: **Registration@SupplyOn.com**
   For general enquiries: **Info@SupplyOn.com**

   Deutschland: 0800.78 77 59 66
   International: +800.78 77 59 66
   USA/Kanada: 1.866. 787.7596
   China (Nord): 10800. 7490127
   China (Süd): 10800. 4900114
   Mexiko: 01.800.123.3231

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① **SupplyOn Online Help**

On the Website of SupplyOn you find multiple help functionalities

Online Help

On each page within the WebEDI service you can find a help button with explanations for the correspondingpage content in the upper menu bar. There are also videos available, which present the general functions of the services.

WebEDI Live and Online Trainings

SupplyOn offers WebEDI introduction trainings as well as advanced trainings. On the SupplyOn Website you can click on the training program, download it or directly register online for training.

CSV format description

On the My SupplyOn page you can find links to the format descriptions, which you might need for data upload or the download of received data for internal electronic processing. You can also download the format descriptions.

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(1) Questions?

Please don't hesitate to ask!

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Thank you for your attention!