

SupplyOn Sourcing Key User Training

Your Supply Chain

Empowered. Connected. Visible. End-to-End.

HITACHI Astemo – SupplyOn Sourcing

Key User Training Sourcing

DIGITAL TRANSFORMATION. DELIVERED.



Aim Grid – Key User Training for SupplyOn Sourcing

Purpose

Why are we doing this? In order to ...

- › get familiar with SupplyOn Sourcing
- › Enable Key Users to create, send, adminstrate RfQ
- › Enable Key Users for daily usage
- › Empower you to train other SRC User

Hitachi Astemo/Stakeholders

For whom are we doing this?

Who are we doing it for?

- › Hitachi Astemo SRC Key users

Who is involved?

- › Hitachi Astemo Purchasing / SupplyOn Consulting

Aim Grid

What do we need to achieve in the time available?

- › Explain general application Logic (5-10 min)
- › Explain SRC project and functionalities
- › Discuss RFQ structure and creation process
- › Explain SRC functionalities
- › Answer open questions

End result

Against which criteria will the result be measured?

- › Key User training performed
- › Questions are answered
- › Video & Presentation is shared with Hitachi Astemo

Criteria

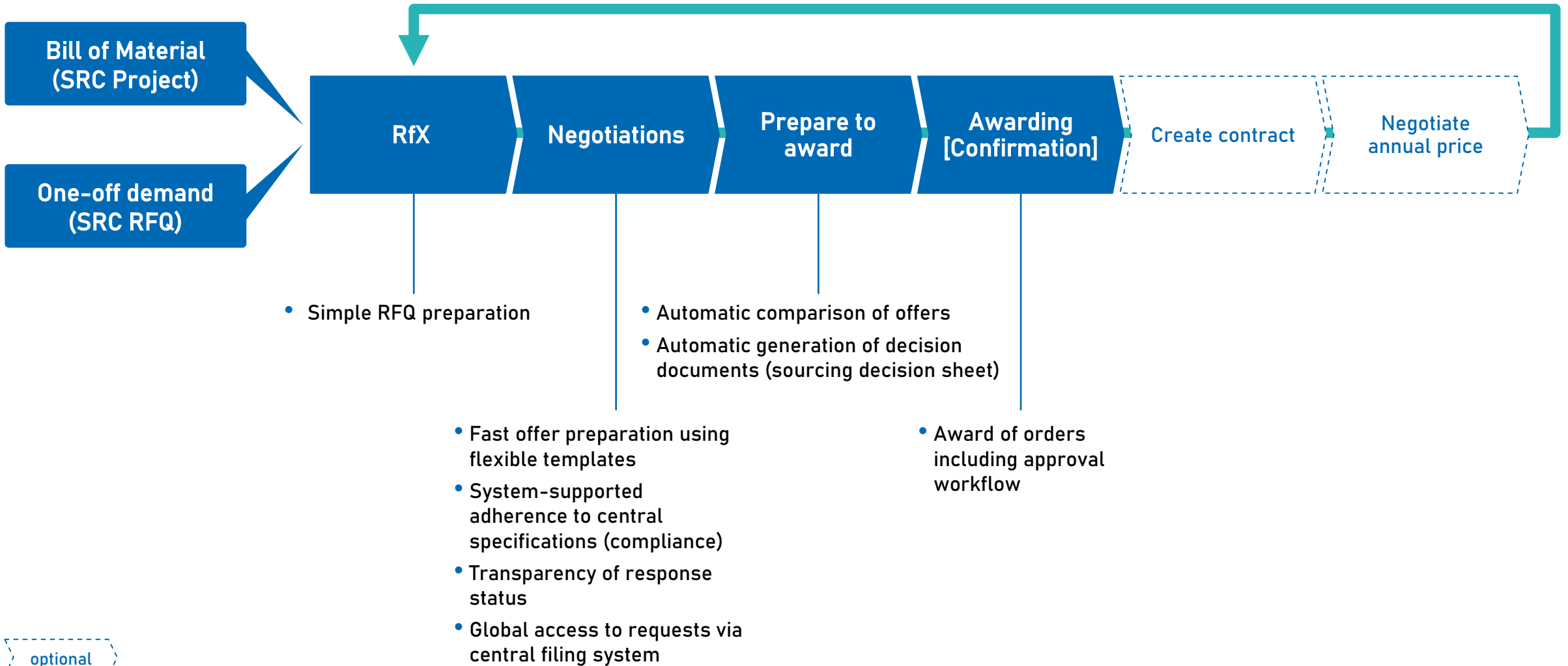
SRC Key User Training – Process & Logic

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SupplyOn Sourcing – Classic RfX Flow

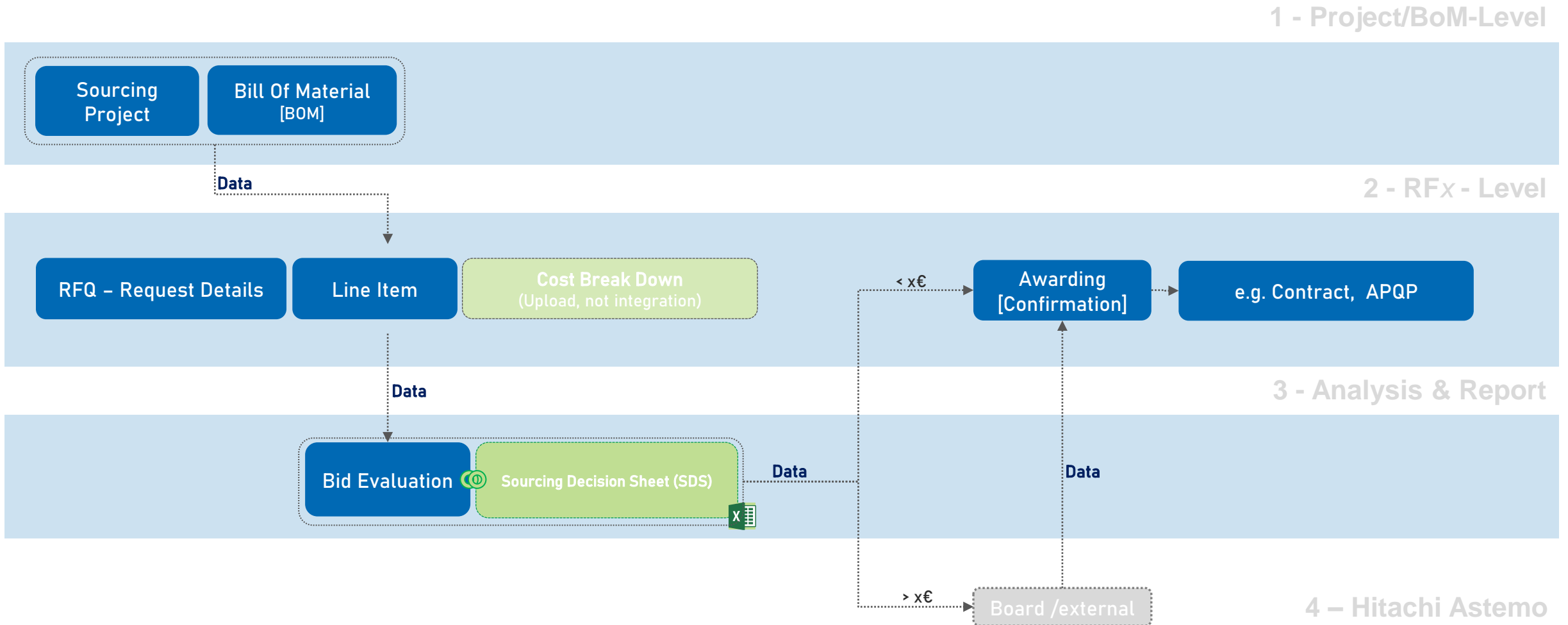
Solution concept: continuous electronic process from the demand to the contract



SupplyOn Sourcing

Sourcing Rfx template – Basic Architecture & Content Flow (data)

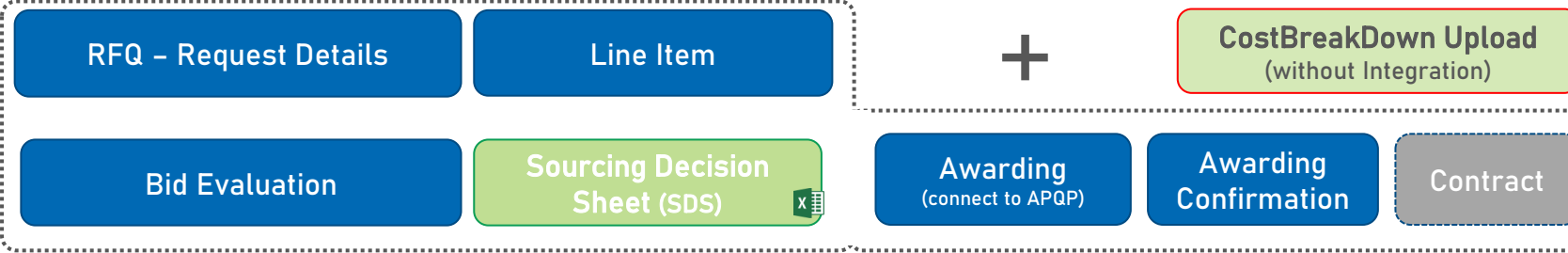
SupplyOn Sourcing Solution – RfQ elements from project to contract



SupplyOn Sourcing – Hitachi Astemo Template Concept for Go-Live

Sourcing RfX templates for Mechanical/Electronic Parts

RfQ Template A – Simplified RfQ for Mechanical Parts

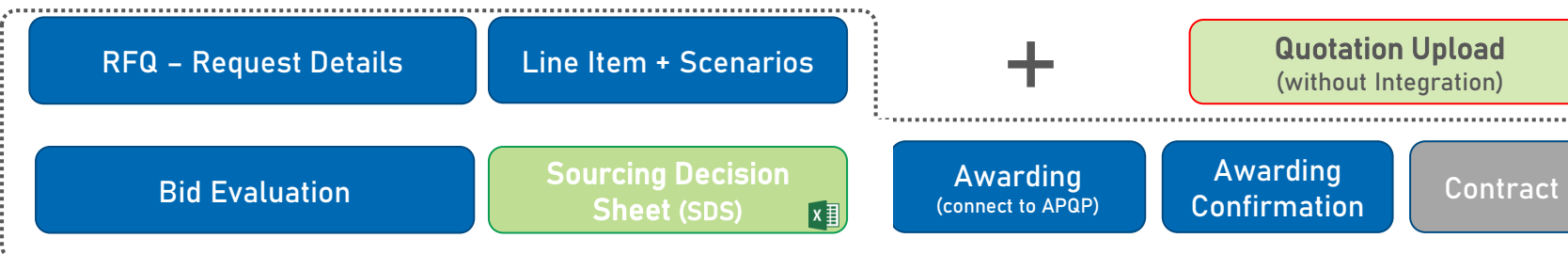


- Simple Template – Focus on usability for the Supplier
- Costbreakdown not integrated

Use Case 1: Supplier has to provide Request Detail & Line Item Information

Use Case 2: Supplier has to provide Request Detail & Line Item Information + Cost Breakdown Attachment

RfQ Template B – Simplified RfQ for Electronic Parts/Semiconductor



- Simple Template – Focus on usability for the Supplier
- Scenario on Line Item activated

Use Case 1: Supplier has to provide Request Detail & Line Item with Scenario

Use Case 2: Alternative Upload of Quotation Possible



Quick Guide – “How to create a RfX”

In A Nutshell – Overview for Preparation-To-Activation

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Sourcing – „Quick Guide“: Prepare & Send RfQ – 1/9

The screenshot shows the 'My SupplyOn: SupplyOn Services' page. The 'SupplyOn Sourcing' tab is highlighted with a green box and a red circle containing the number '1'. Below the tab, there is a brief description of the Sourcing process. To the right, the user's profile 'Schönemann, Christian' is visible with a profile picture and an 'Upload image' link.

1. After login access *SupplyOn Sourcing*
2. The „my requests“ tab lists all RfQ owned by you
3. Click on „Templates“ tab: it provides all available RfQ templates to directly select template & start working

The screenshot shows the 'My requests' page under 'Sourcing'. The 'My requests' tab is highlighted with a green box and a red circle containing the number '2'. The 'Templates' tab is also highlighted with a green box and a red circle containing the number '3'. The page includes a search bar, a 'Create new request' button, and a table with columns for Name, ID, Changed by, Last modified, Status, Bids, Time left, Project, and Discussions. The table currently shows 'The table has no entries.' and a 'Download Excel file' button.

A request can be started alternatively with „Create new request“ Button

<< What you see!

Inbox (RfQ overview table)

- RfQ's and versions
- details on time
- status

within this section the status of an RfQ can be adjusted – e.g. „set to closed“

Sourcing – „Quick Guide“: Prepare & Send RfQ – 2/9

My SupplyOn > Purchasing > Sourcing : Templates: Published templates

You will find all templates from which you can create requests here.

Act as substitute

My requests | Requests of colleagues | All requests | Sourcing List | **Templates** | Projects | Tasks

Published templates | My templates | Templates last used

Name	Type	Changed by	Last changed on	Available for	Customizable
BASIC RFQ [QUANTITY SCEN]	RFQ	Schoenemann, Christian [BUYER]	7/13/2022 4:06 PM CEST	All	No

4

5

Create request | Copy

1 template

Rows per page 10

First Previous | Page 1 of 1 | Next Last

4. Choose the required template from the table and click the checkbox for activation

5. Click „Create Request“

Sourcing – „Quick Guide“: Prepare & Send RfQ – 3/9

My SupplyOn > Purchasing > Sourcing : Templates: Published templates > Create RFQ: Request details

trg-B. Fischer AG (DEMO COMPANY) - Schoenemann Christian [BUYER] Log Out

Help and support | Print | Message to support

Create RFQ

Send request Save as draft Back More

Request details Add / modify items Suppliers & Colleagues Response Status Bid Evaluation Awarding & Quality Awarding confirmation Contract creation

You enter the details of your request here.

6 Internal Information

Currently used: Standard Demo [CSC] template

Customer: OEM Group

Project Manager: Hans Meier

Offer to Customer: 11/30/2022

Project Number Internal / SAP: 22212123445

Sourcing Documentation: Drop file(s) here

Upload Add from Document Management Manage attachments Copy

No attachments were uploaded.

Project Category: New Part

Export Controls Check: YES NO

Category: AEM - ALUMINIUM EXTRUSION ANC

Project: Select project

Quality Manager: Buyer, Sigfried

7 Request Details

Visible for suppliers.

Add / Modify Items

Request Name*: My First RfX

Request ID: Not yet assigned

Start Date, Time: 8/31/2022 11:59 PM

End Date, Time*: 8/31/2022 11:59 PM

RFQ Description:

Attachments: Drop file(s) here

Response options

Seller has to bid on the requested quantity.

Seller is allowed to bid on his modified quantity.

Alternative bid allowed

Regular bid is compulsory

Request currency: EUR

Alternative currencies allowed

8 E-Mail Notifications

On incoming bids

Remind supplier 3 days before end date

Send bid overview to buyer 1 days before end date

The „Request details“ section gets opened...

6. Fill internal fields
(suppliers cannot see later)

7. Fill public elements
(shared with colleagues & suppliers)

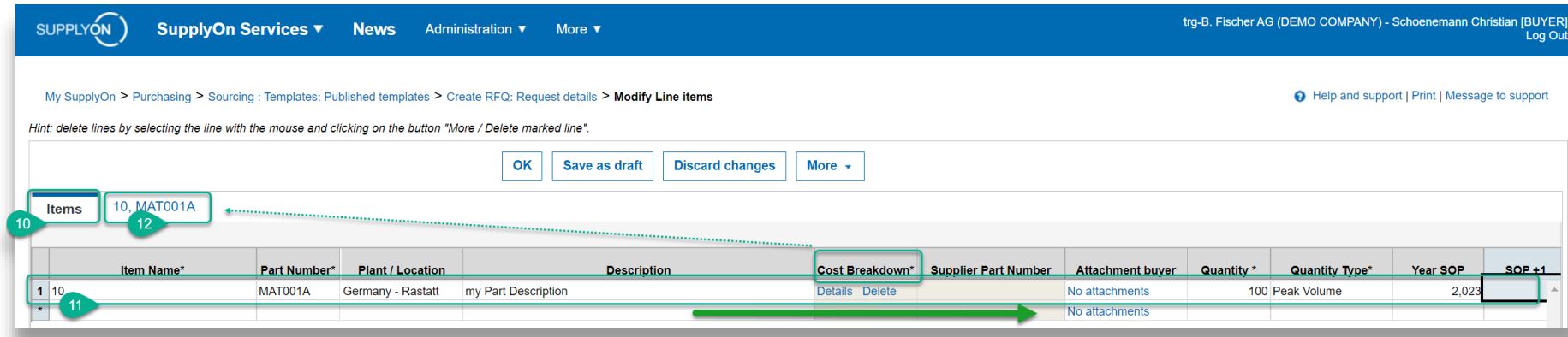
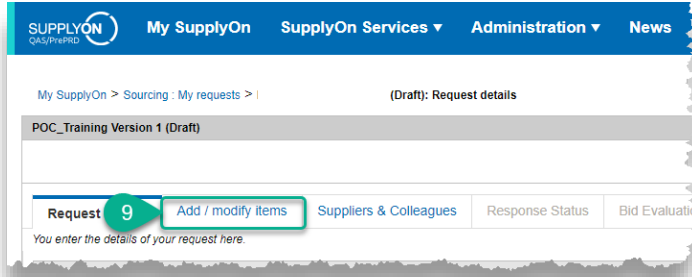
A) you can also add documents by using upload or drag & drop function

B) Fields marked with „*“ are mandatory. If not filled the validation before sending the RfX will fail and the request must be adjusted

8. Choose your preferred options to adjust auto-email logic

- „On incoming bids“ = buyer gets an Email once a supplier has provided a bid
- „Remind supplier ...“ = X days before auto-close of RfX suppliers get reminded to provide a bid
- „Send bid overview..“ = buyer gets an email with a summary table showing the bidding status of all suppliers

Sourcing – „Quick Guide“: Prepare & Send RfQ – 4/9



09. Click on tab „Add / modify items“ to open the line item section

10. Goto „items“

11. Fill all part-related details

- You can only fill the buy-side fields
 - White = public & shared with colleagues + suppliers
 - Yellow = internal information, not shared with suppliers
 - Grey = supplier fields, can only be filled by using sell-side login

12. Following enter the CBS tab

- CBS = Cost Breakdown Sheet
- The tab displays the name inserted to the item name field (here: 10)

Sourcing – „Quick Guide“: Prepare & Send RfQ – 5/9

SUPPLYON SupplyOn Services News Administration More

trg-B, Fischer AG (DEMO COMPANY) - Schoenemann Christian [BUYER] Log Out

My SupplyOn > Purchasing > Sourcing : Templates: Published templates > Create RFQ: Request details > **Modify Line Items**

Help and support | Print | Message to support

Hint: delete lines by selecting the line with the mouse and clicking on the button "More / Delete marked line".

OK Save as draft Discard changes More

Items 10, MAT001A

A1:

B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Request End Date		8/31/2022		Supplier Incoterms										
Item Name (Part Number)		10		Supplier Production Location										
SOP				Description		my Part Description								
Quantity		100		Lead Time Serial Parts (weeks)										
Quantity Type		Peak Volume		Bid Currency		EUR								
Project demand over life-time		2,023		Price unit		1								
				part weight complete part (in g)										

Request Quote Details

Material Related Cost

Material Related Cost (Raw Material, Components, External Processing)	Material / Component Sub-supplier	Name of Sub-supplier	Sub-Supplier								Total Price excl. Scrap [per Price Unit]	Scrap Rate
			Cost per UoM									
Material-Type	Material-Name Sub Supplier		Country of Origin	Used Quantity per Piece	Unit of Meas.	Amount	Bid Currency	Price Base [EUR/Material Unit]	Material Surcharge [EUR/kg]			
							EUR	0.000		0.000		
							EUR	0.000		0.000		
							EUR	0.000		0.000		

OK Save as draft Discard changes More

The connected CBS sheet is shown..

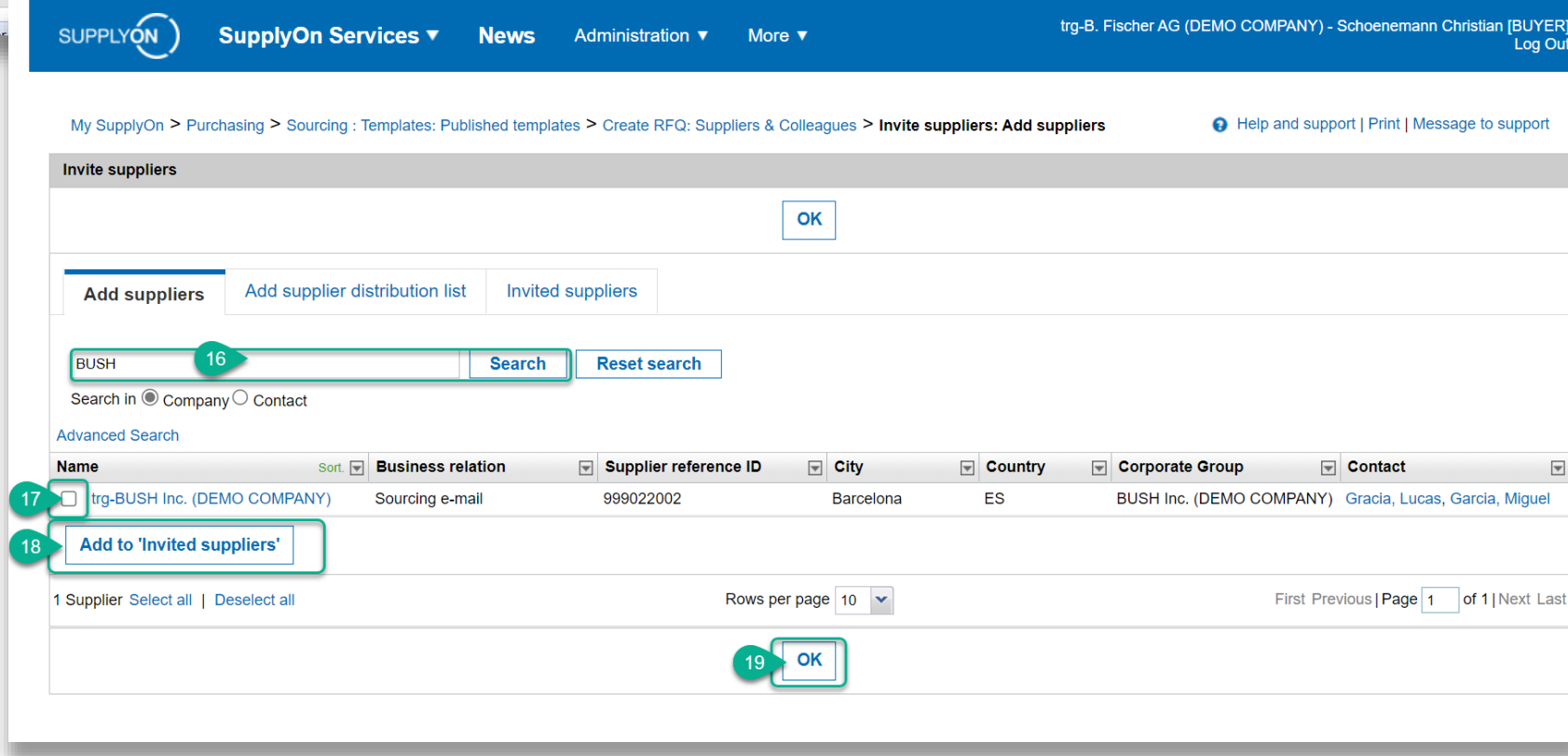
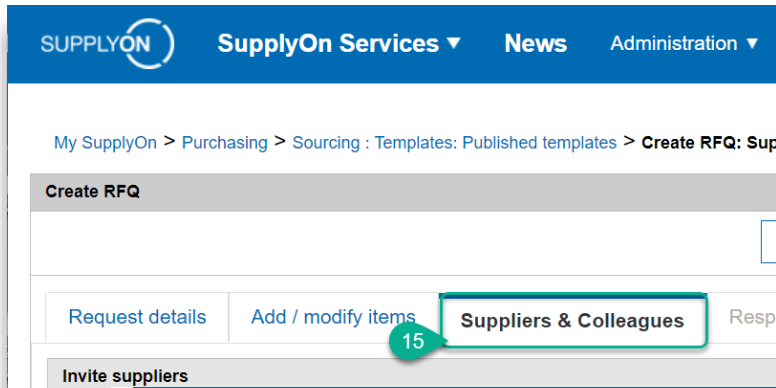
13. Check and/or fill the buy-side fields (e.g. green) if available*

- (e.g.) Green = public & shared with colleagues + suppliers. Cannot be adjusted by suppliers
- (e.g.) Yellow = supplier fields

14. Click on „OK“ to return to „Request details“

* depends on CBS definition

Sourcing – „Quick Guide“: Prepare & Send RfQ – 6/9



Following you can invite..

- registered suppliers
- unregistered suppliers
- colleagues

15. Enter „Supplier & Colleagues“ tab

16. Search by using supplier company name. (Asterisk (*) is supported) & click „Search“

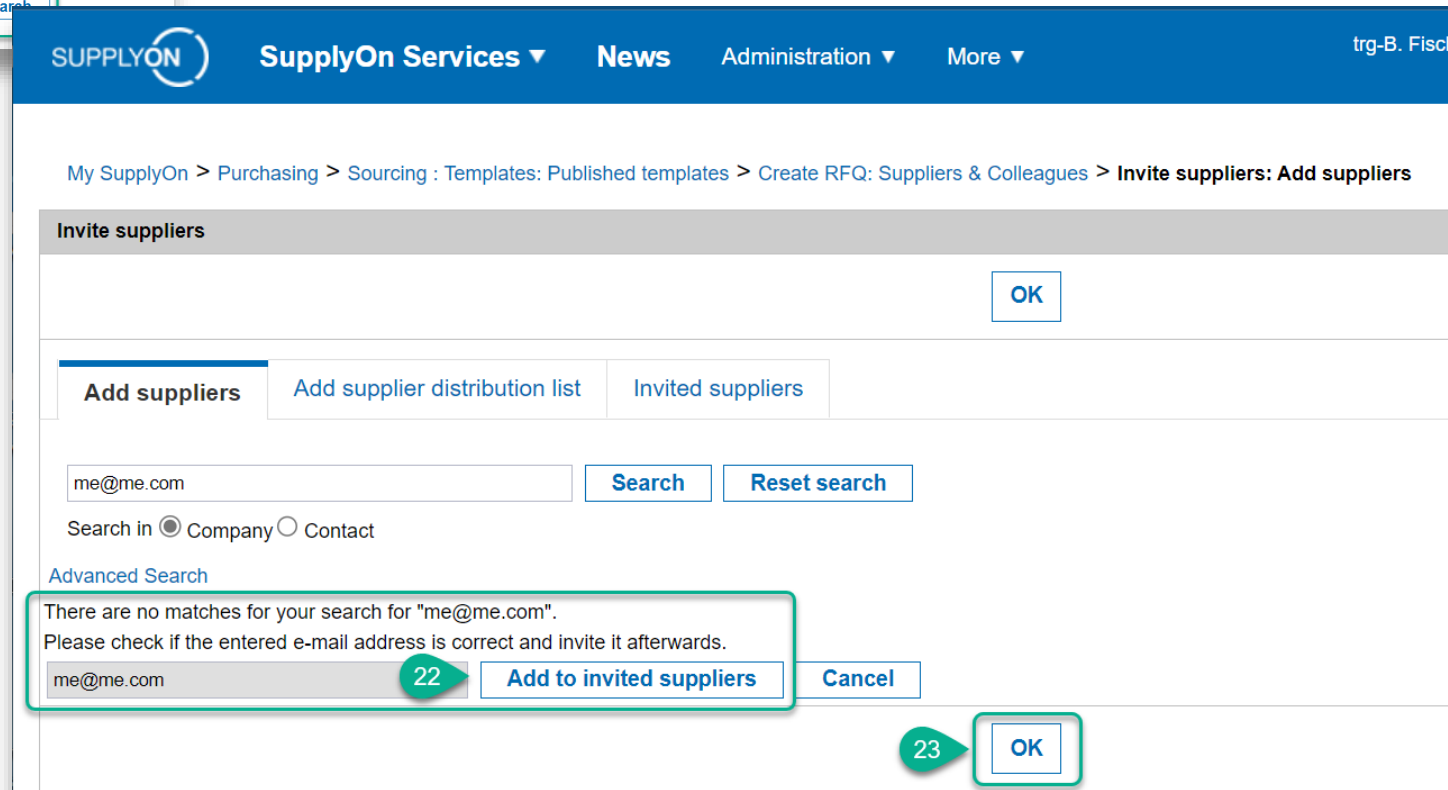
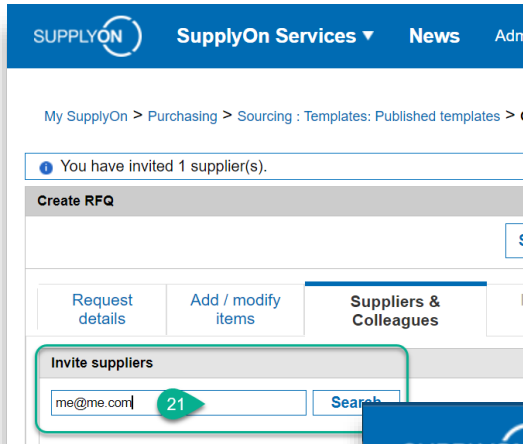
17. The list of detected suppliers is displayed. Choose the relevant ones by setting a flag

18. Click „Add to ,invited suppliers“

19. ...followed by OK

Remark: Please only use the test suppliers provided for your company

Sourcing – „Quick Guide“: Prepare & Send RfQ – 7/9



Also *non-registered* supplier can be added to an RfQ. Please return to the search field....

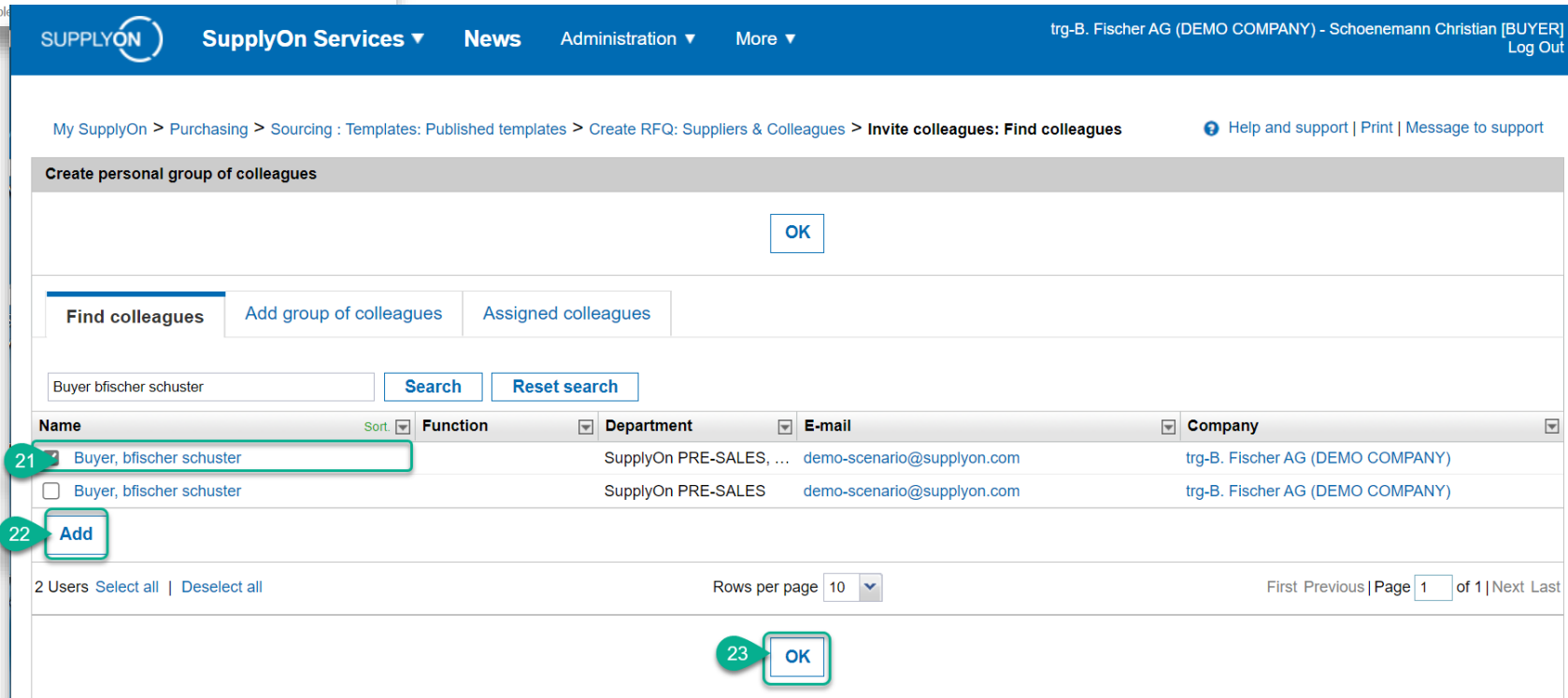
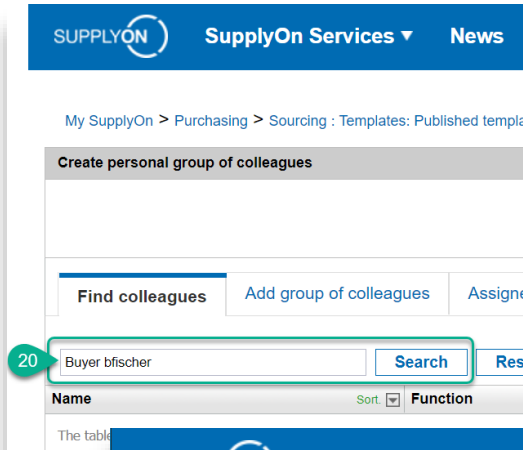
21. Enter a validated email address of a person or post-box on supplier side (e.g. me@me.com) & click „Search“

In case the contact is new to the platform an additional line is added to the interface.

22./23. confirm „Add to ,invited suppliers“ & following click OK

Remark: for testing your personal company emailaddress can be used to simulate a supplier.

Sourcing – „Quick Guide“: Prepare & Send RfQ – 8/9



In addition it might be necessary to invite colleagues. Invited persons can access the RfQ (read or write)

20. Search by inserting (user)name. (Asterisk (*) is supported) & click „Search“...

21. The list of detected colleagues is displayed. Choose the relevant ones by setting a flag...

22. Click „Add“...

23. ...and OK

Following you'll be returned to the „Suppliers & Colleagues“ screen.

Sourcing – „Quick Guide“: Prepare & Send RfQ – 9/9

My SupplyOn > Purchasing > Sourcing : Templates: Published templates > Create RFQ: Suppliers & Colleagues

trg-B. Fischer AG (DEMO COMPANY) - Schoenemann Christian [BUYER] Log Out

Help and support | Print | Message to support

Create RFQ

Send request Save as draft Back More

A B C

Request details Add / modify items **Suppliers & Colleagues** Response Status Bid Evaluation Awarding & Quality Awarding confirmation Contract creation

Invite suppliers Collapse

Company, e-mail, supplier ID Search

- Add or change supplier distribution lists
- Save as supplier distribution list
- Change invited suppliers

Company	Supplier reference ID	Business	Contacts	NDA activate	Mgmt. Cock	End date, time
trg-BUSH Inc. (DEMO COMPANY)	999022002	Sourcing ...	Contacts	<input checked="" type="checkbox"/>	Link	

1 Supplier Rows per page 10 First Previous | Page 1 of 1 | Next Last

Suppliers with E-mail Access

E-mail	NDA activate	End date, time
me@me.com	<input checked="" type="checkbox"/>	

Invited Colleagues Collapse

Name, E-Mail Search

- Add/Modify Group of Colleagues
- Create/modify personal Groups
- Save as personal Group
- Modify Invited Colleagues

Invited Colleagues:

Buyer, bfischer jones (Read) Gabel, Elke (Write)

Invited Groups:

DEMO GROUP (Read)

24 Send request Save as draft Back More

RESULT:

The RfQ is ready to send..

- A) Header information is maintained
- B) Produkt details are maintained
- C) Relevant parties are added
 - registered suppliers
 - non-registered suppliers
 - colleagues

25. Click „Send request“

Quick Guide – “How to Upload Project Information”

Step by Step Instruction for Project Upload

Your Supply Chain

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Sourcing – „Quick Guide“: Upload Project – 1/4

Projects

1. Download Project Template

+ Create new project Download Excel file **Download template** Upload project

🔍 Name Search Reset search Advanced search

Project name	Responsible	Created on	Changed by	Last modified	Status	Access
Hitachi Tesla Project	Aprin, Roman	11/3/2023 1:25 PM CET	Aprin, Roman	11/3/2023 1:34 PM CET	Active	Administrator
Hitachi Tesla Project	Aprin, Roman	11/1/2023 4:23 PM CET	Aprin, Roman	11/1/2023 4:23 PM CET	Active	Administrator
Hitachi Tesla Project	Aprin, Roman	10/26/2023 8:22 AM CEST	Aprin, Roman	10/26/2023 8:22 AM CEST	Active	Administrator
Hitachi Tesla Project	Aprin, Roman	10/25/2023 4:28 PM CEST	Aprin, Roman	10/25/2023 4:28 PM CEST	Draft	Administrator
Hitachi Tesla Project	Aprin, Roman	10/25/2023 4:03 PM CEST	Aprin, Roman	10/25/2023 4:04 PM CEST	Active	Administrator
Test Project	Aprin, Roman	10/25/2023 4:02 PM CEST	Aprin, Roman	10/25/2023 4:02 PM CEST	Active	Administrator
Hitachi Tesla Project_2	Aprin, Roman	10/25/2023 1:38 PM CEST	Aprin, Roman	10/25/2023 1:38 PM CEST	Active	Administrator
Hitachi Tesla Project V1	Aprin, Roman	9/21/2023 8:16 AM CEST	Aprin, Roman	10/16/2023 2:50 PM CEST	Active	Administrator
Hitachi Tesla Project	Aprin, Roman	9/14/2023 11:52 AM CEST	Aprin, Roman	9/14/2023 2:26 PM CEST	Active	Administrator

9 project(s) Rows per page 10

Steps 1:

- Access SRC Project Area
- Download Project Template

Sourcing – „Quick Guide“: Upload Project – 2/4

Project details	
Project name*	
Description	
Product Code*	
Type of Purchase	
Product Group*	
Product Part Number (Customer)	
Vehicle*	
RFQ Classification*	
Vehicle Market*	
Base Model Code	
Sales Price Incoterms*	
RFQ Raw Material Price Condition*	

Number	Part Number	Drawing No.	Category	Sub Category	Category Buyer	Price Unit	Quantity	Unit of Measure	Annual Component Volume SOP	Annual Component Volume SOP + 1	Annual Component Volume SOP + 2
1											
2											
3											
4											
5											
6											
7											
8											
9											
10											
11											
12											
13											
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25											
26											
27											
28											
29											

- Steps 2:**
- Open Project Template
 - Provide Project Information & Save

Sourcing – „Quick Guide“: Upload Project – 3/4

Projects

3. Upload Project Template

+ Create new project Download Excel file Download template **Upload project**

Q Name Search Reset search Advanced search

Project name	Responsible	Created on	Changed by	Last modified	Status	Access
Hitachi Tesla Project ...	Aprin, Roman	11/3/2023 1:25 PM CET	Aprin, Roman	11/3/2023 1:34 PM CET	Active	Administrator
Hitachi Tesla Project ...	Aprin, Roman	11/1/2023 4:23 PM CET	Aprin, Roman	11/1/2023 4:23 PM CET	Active	Administrator
Hitachi Tesla Project ...	Aprin, Roman	10/26/2023 8:22 AM CEST	Aprin, Roman	10/26/2023 8:22 AM CEST	Active	Administrator
Hitachi Tesla Project ...	Aprin, Roman	10/25/2023 4:28 PM CEST	Aprin, Roman	10/25/2023 4:28 PM CEST	Draft	Administrator
Hitachi Tesla Project ...	Aprin, Roman	10/25/2023 4:03 PM CEST	Aprin, Roman	10/25/2023 4:04 PM CEST	Active	Administrator
Test Project ...	Aprin, Roman	10/25/2023 4:02 PM CEST	Aprin, Roman	10/25/2023 4:02 PM CEST	Active	Administrator
Hitachi Tesla Project_2 ...	Aprin, Roman	10/25/2023 1:38 PM CEST	Aprin, Roman	10/25/2023 1:38 PM CEST	Active	Administrator
Hitachi Tesla Project V1 ...	Aprin, Roman	9/21/2023 8:16 AM CEST	Aprin, Roman	10/16/2023 2:50 PM CEST	Active	Administrator
Hitachi Tesla Project ...	Aprin, Roman	9/14/2023 11:52 AM CEST	Aprin, Roman	9/14/2023 2:26 PM CEST	Active	Administrator

9 project(s) Rows per page 10

Steps 3:

- Click on “Upload Project”
- Add Project Template as xlsx. file

Project upload

Please select a file for the upload.

+ Add...

Cancel

Sourcing – „Quick Guide“: Upload Project – 4/4

Hitachi Tesla Project

Save and back Save Download Excel file Cancel

Project details Bill of materials Requests Participant

Project name*: Hitachi Tesla Project

Description:

Product Code*: 12

Product Group*: Product Group 2

Vehicle*: 12

Vehicle Market*: 12

Sales Price Incoterms*: 12

BC Fam No*: 12

Customer Name*: Daihatsu

Astemo BD/BU*: Astemo BD/BU 1

RFQ Background*: 12

Product Name*: 12

Product Part Number (Astemo): 12

Region*: Asia

Requested Payment Terms: 3

Type of Purchase: Type of Purchase 1

Product Part Number (Customer): 12

RFQ Classification*: New Project

Base Model Code: 12

RFQ Raw Material Price Condition*: 12

Award Feasibility (%)*: 12

Customer Production Site*: 12

Flexibility of Production Capacity in % [Customer]: 12

Main Plant:

Frontend Plant:

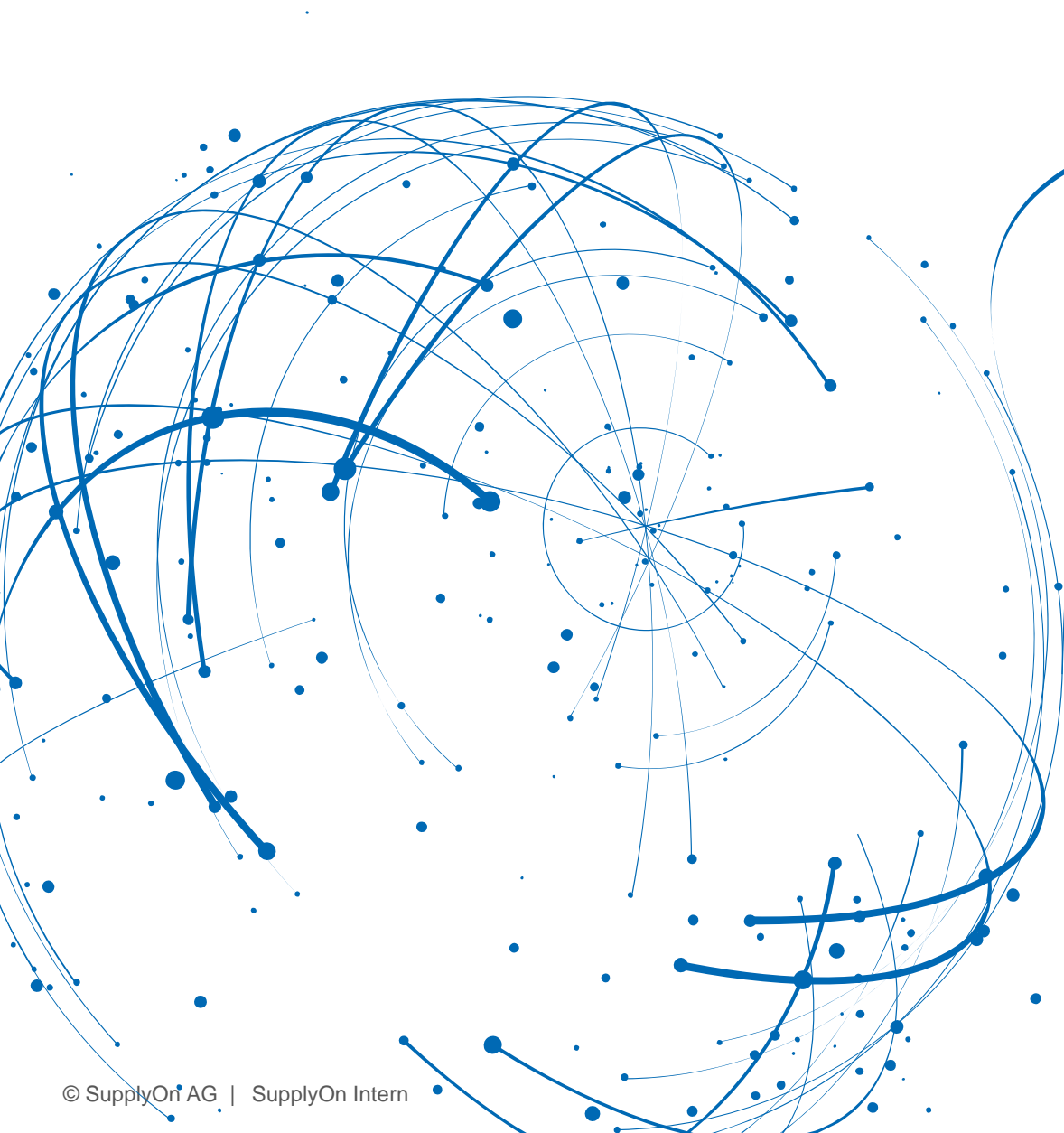
Backend Plant:

Product RFQ due date: 11/22/2023

Request Incoterms: DAP Bolton Plant

Steps 4:

- Check Project Information



? Any Questions

SupplyOn AG

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