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

SUPPLYON

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

- Simple RFQ preparation

- Automatic comparison of offers
- Automatic generation of decision documents (sourcing decision sheet)

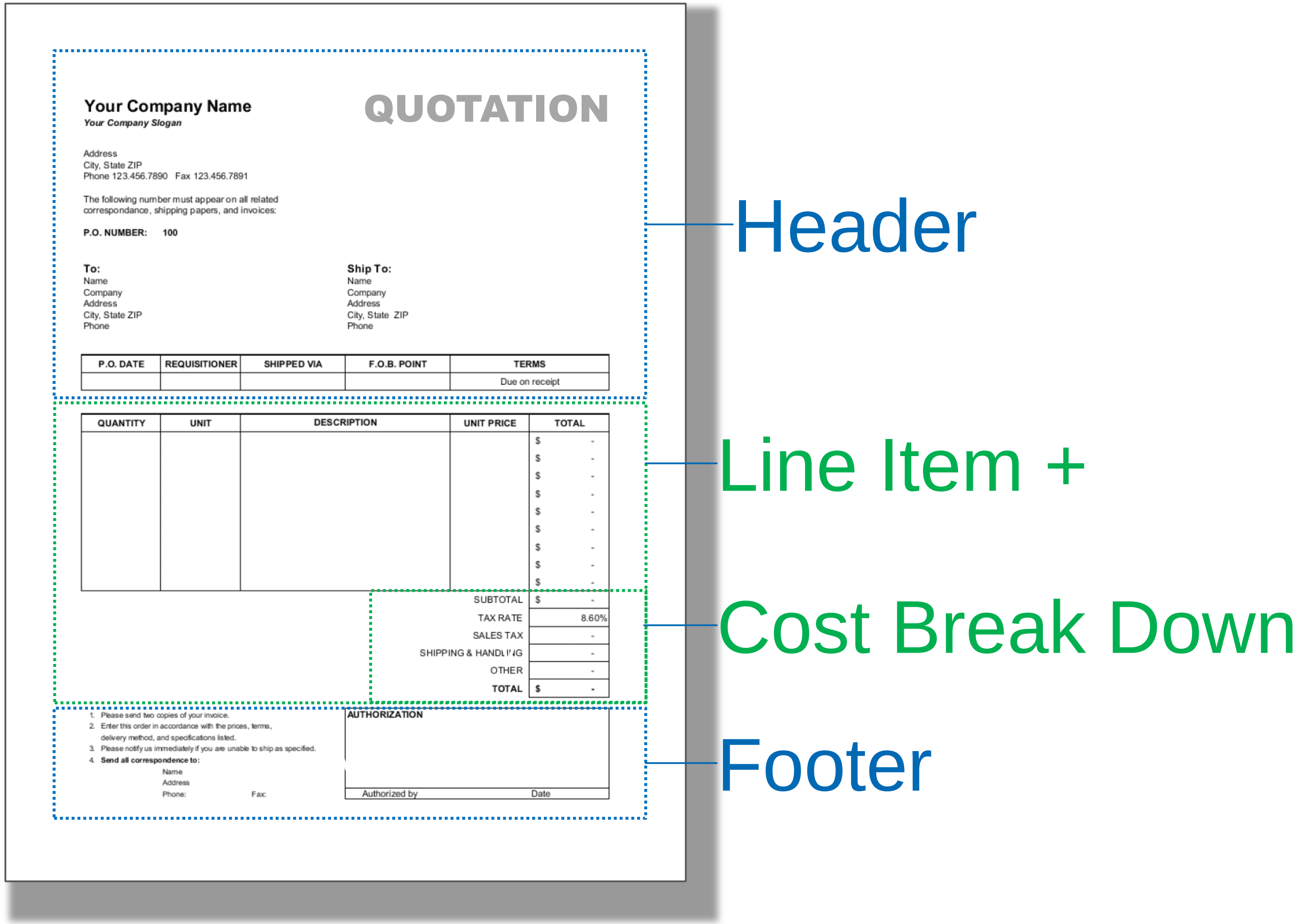
- Fast offer preparation using flexible templates
- System-supported adherence to central specifications (compliance)
- Transparency of response status
- Global access to requests via central filing system

- Award of orders including approval workflow

optional

SupplyOn Sourcing

Sourcing application structure compared with a quotation document



Your Company Name
Your Company Slogan

QUOTATION

Address
City, State ZIP
Phone 123.456.7890 Fax 123.456.7891

The following number must appear on all related correspondance, shipping papers, and invoices:

P.O. NUMBER: 100

To:
Name
Company
Address
City, State ZIP
Phone

Ship To:
Name
Company
Address
City, State ZIP
Phone

P.O. DATE	REQUISITIONER	SHIPPED VIA	F.O.B. POINT	TERMS
				Due on receipt

QUANTITY	UNIT	DESCRIPTION	UNIT PRICE	TOTAL
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
				$ -
			SUBTOTAL	$ -
			TAX RATE	8.60%
			SALES TAX	-
			SHIPPING & HANDLING	-
			OTHER	-
			TOTAL	$ -

1. Please send two copies of your invoice.
2. Enter this order in accordance with the prices, terms, delivery method, and specifications listed.
3. Please notify us immediately if you are unable to ship as specified.
4. **Send all correspondence to:**
   Name
   Address
   Phone: Fax:

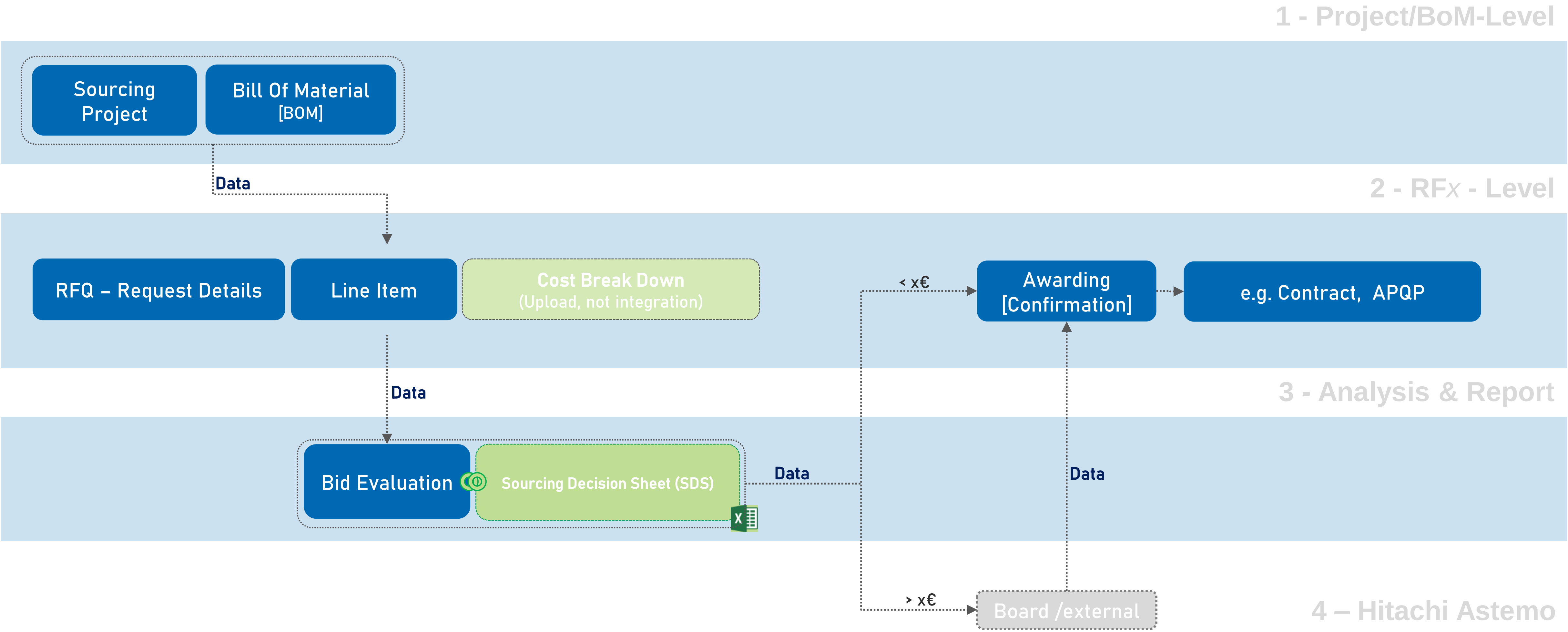
AUTHORIZATION

Authorized by Date

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

RFQ – Request Details

Line Item

+

CostBreakDown Upload
(without Integration)

Bid Evaluation

Sourcing Decision Sheet (SDS)

Awarding
(connect to APQP)

Awarding Confirmation

Contract

- 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

RFQ – Request Details

Line Item + Scenarios

+

Quotation Upload
(without Integration)

Bid Evaluation

Sourcing Decision Sheet (SDS)

Awarding
(connect to APQP)

Awarding Confirmation

Contract

- 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

SupplyOn Sourcing Demo

Quick Guide – “How to create a RfX”

In A Nutshell – Overview for Preparation-To-Activation

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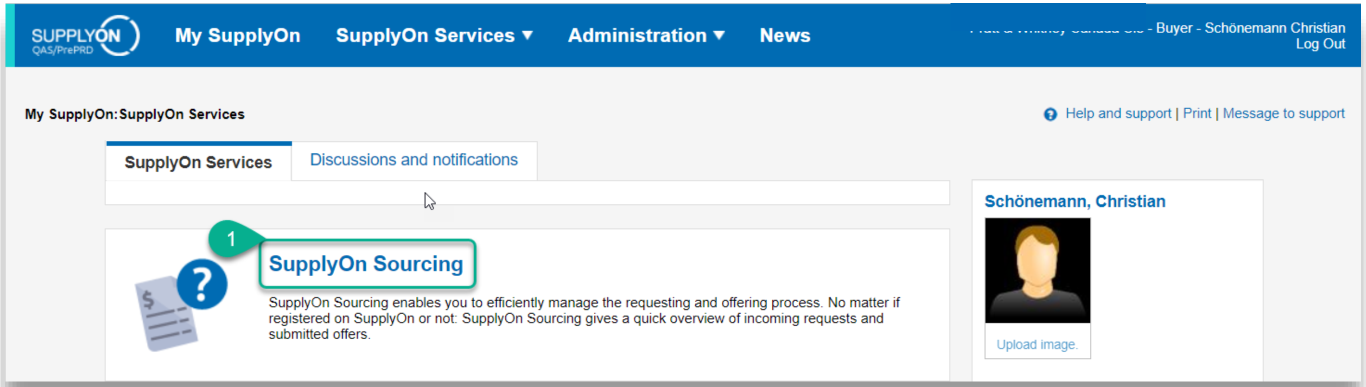
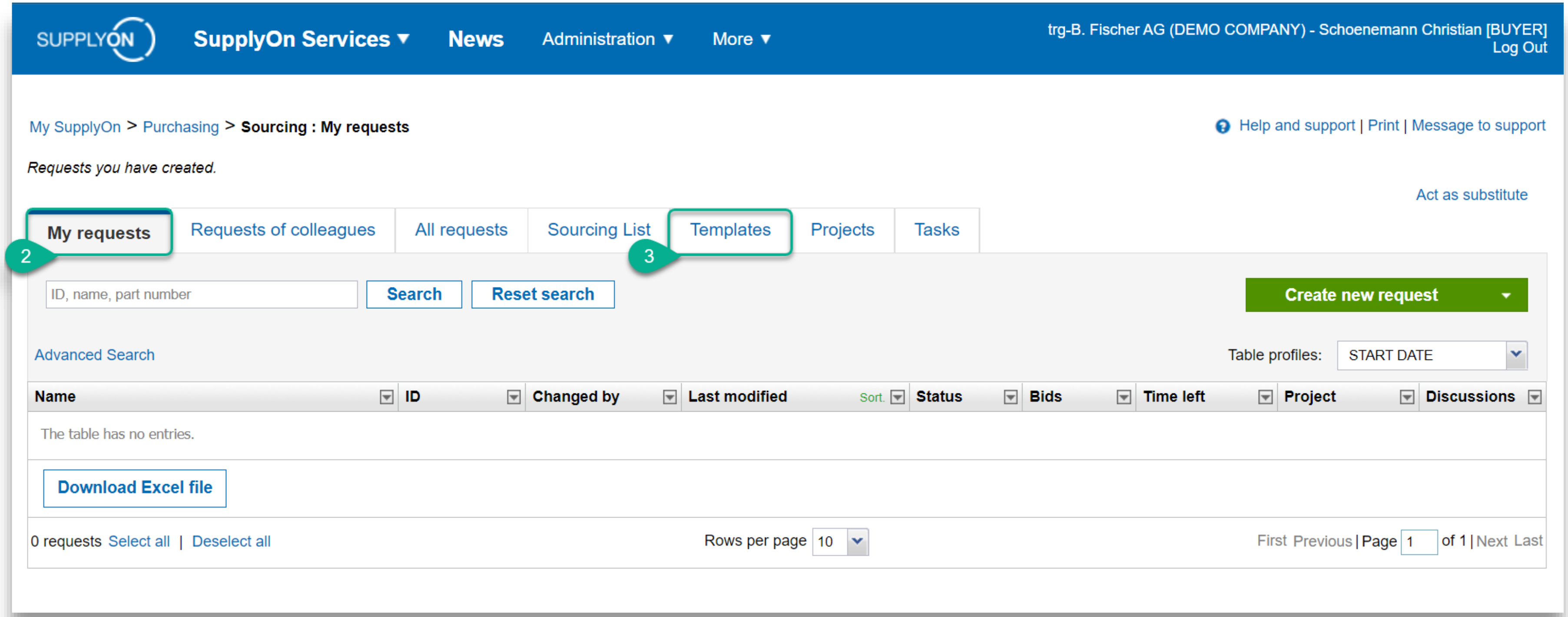
Sourcing – „Quick Guide“: Prepare & Send RfQ – 1/9





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

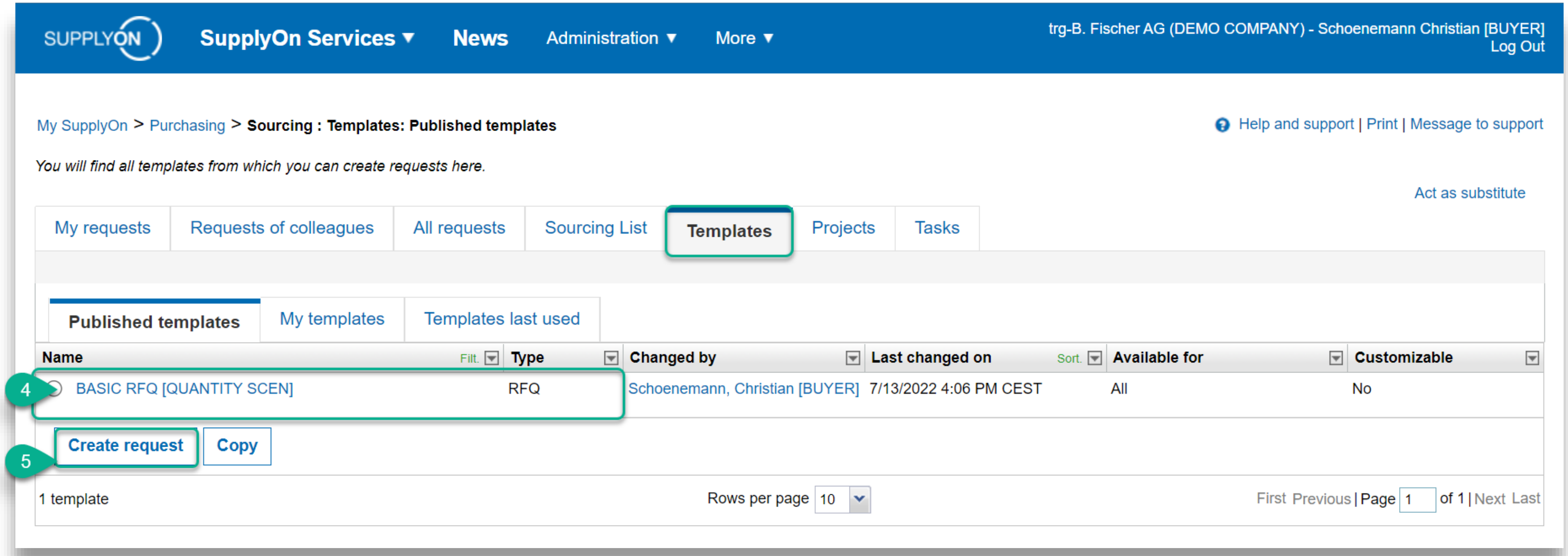
A request can be started alternatively with „Create new request“ Button

<< **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“

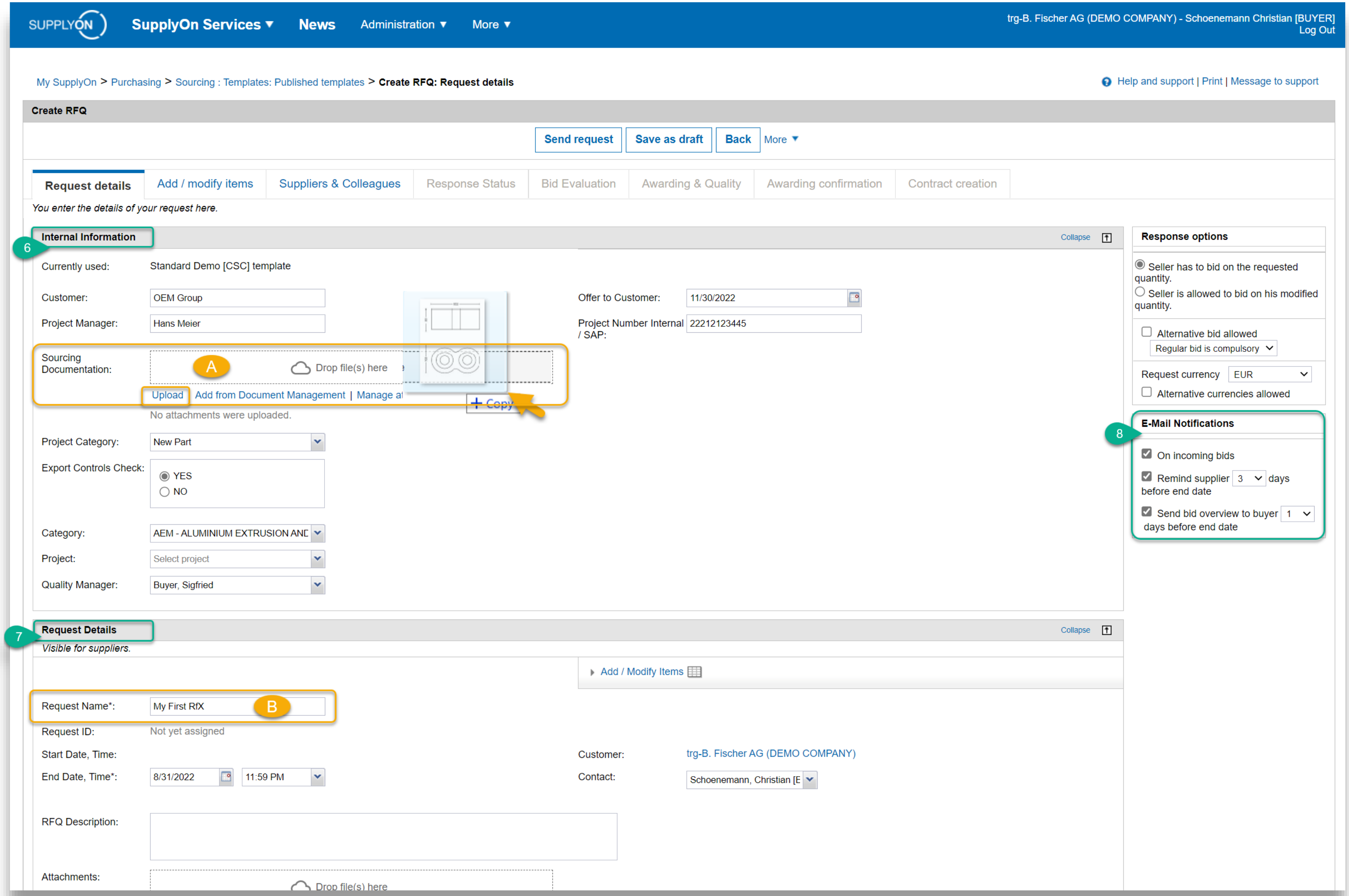
Sourcing – „Quick Guide“: Prepare & Send RfQ – 2/9



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



The „Request details“ section gets opened...

6. Fill internal fields
(suppliers cannot see later)

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

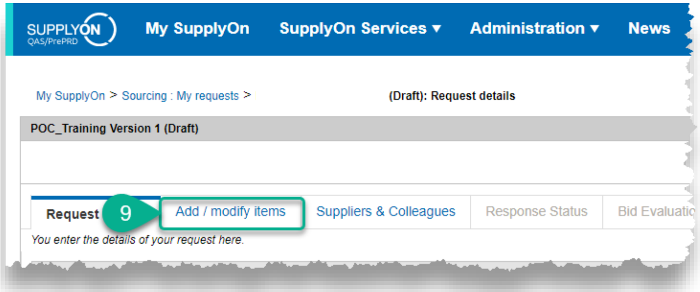
A) you can also add documents by using upload or drag & drop function

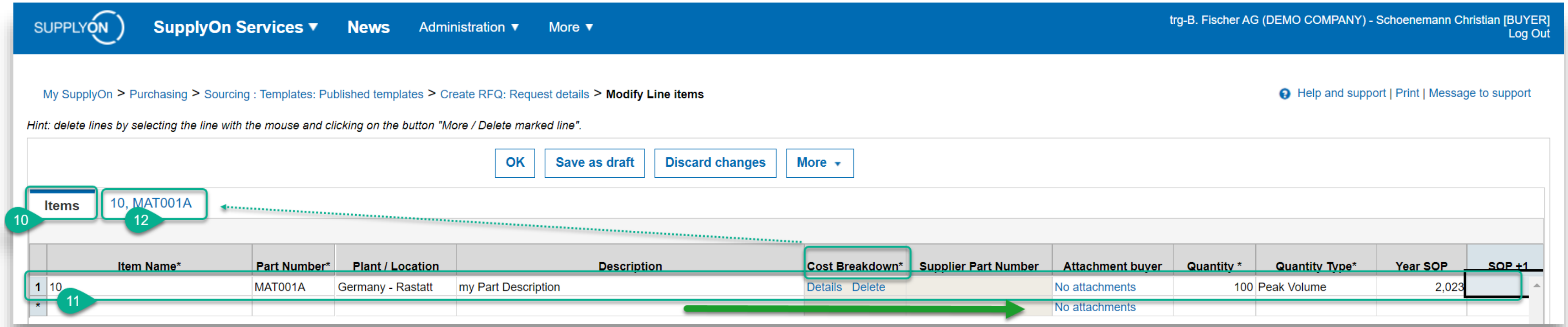
B) Fields marked with „*“ are mandatory.
If not filled the validation before sending the RfX will fail and the request must be adjusted

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“

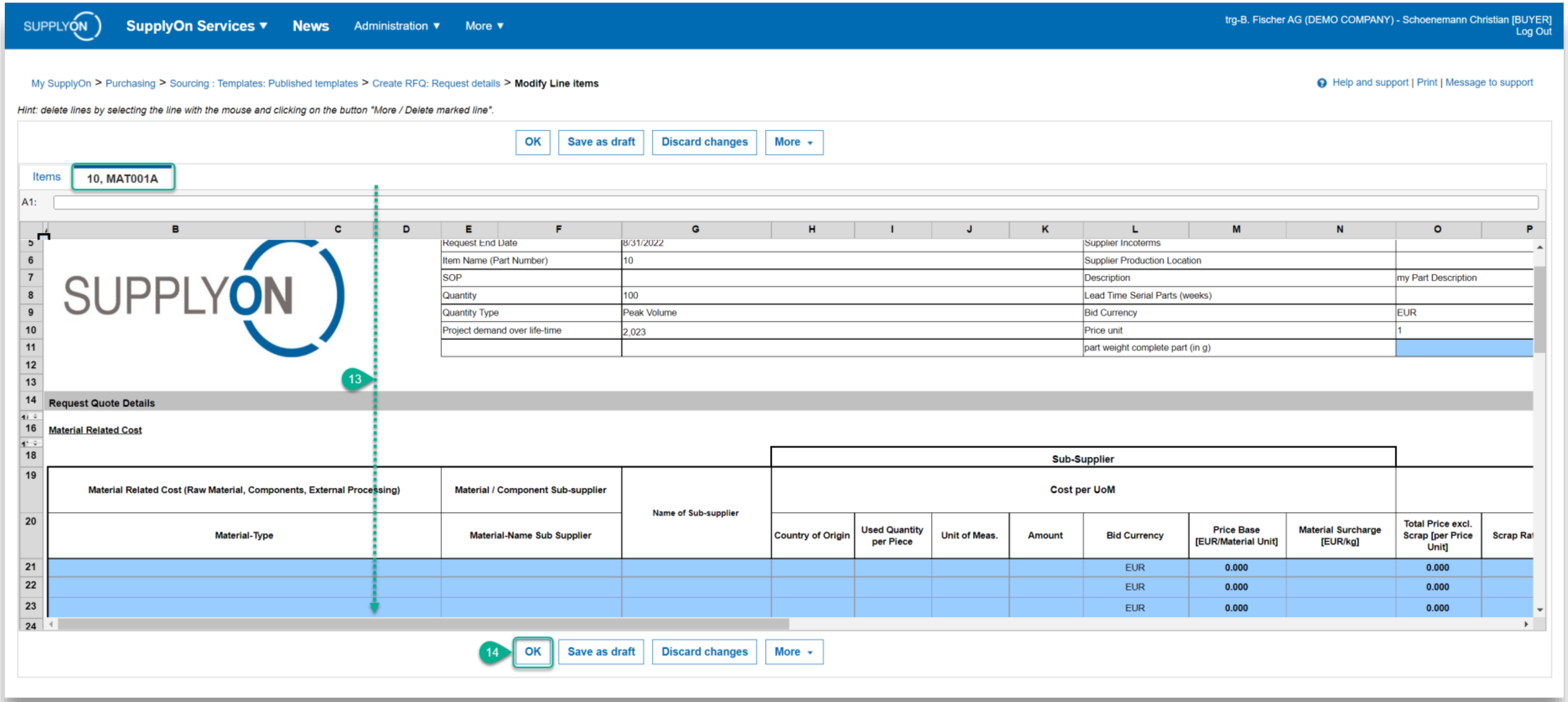
11. Fill all part-related details

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

12. Following enter the CBS tab

  - CBS = Cost Breakdown Sheet
  - The tab displays the name inserted to the item name field (here: 1o)

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



The connected CBS sheet is shown..

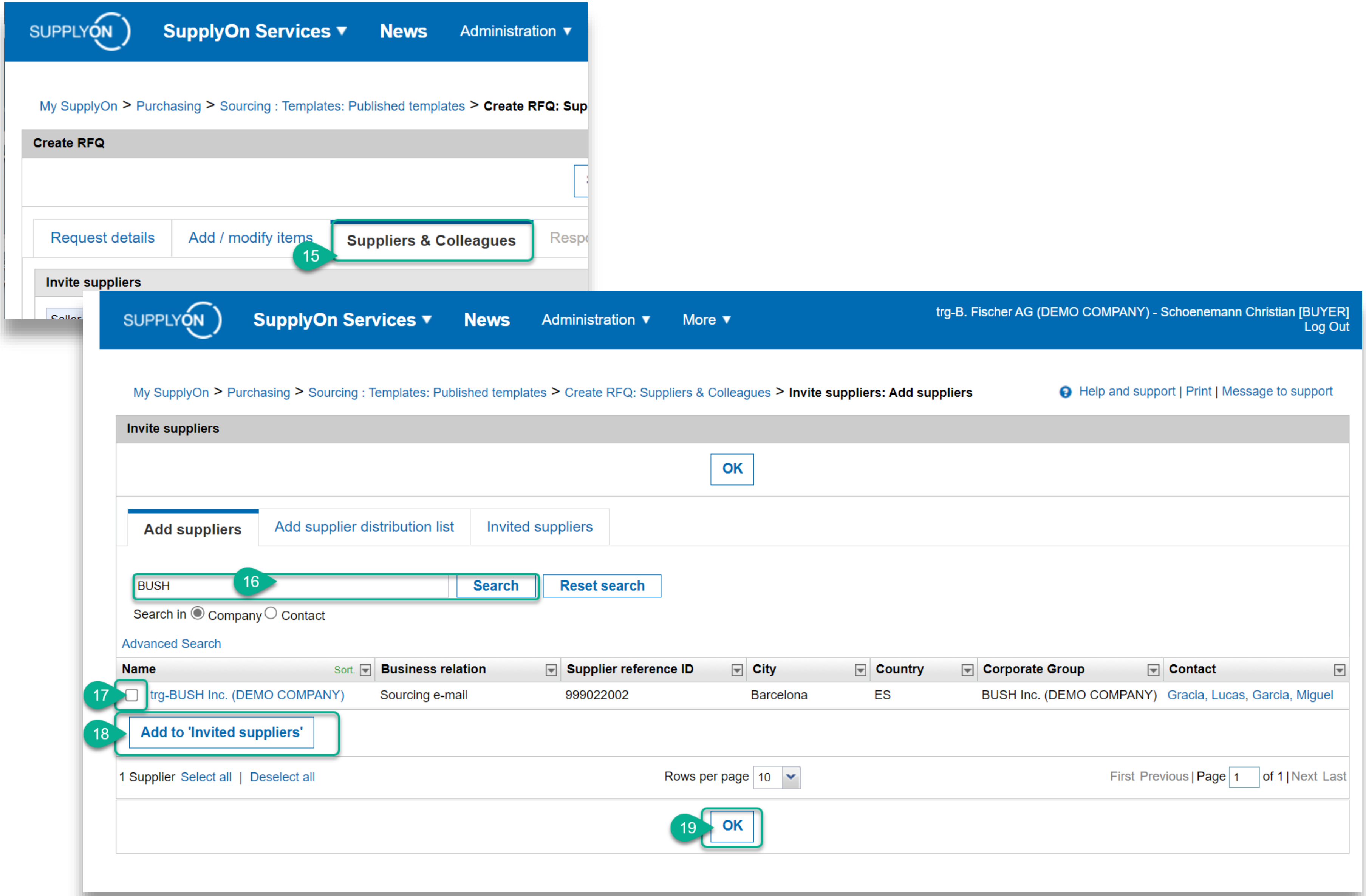
13. Check and/or fill the buyside fields (e.g. green) if available*

- (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



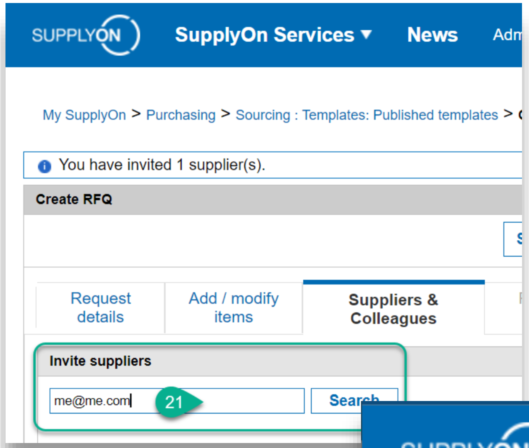
Following you can invite..

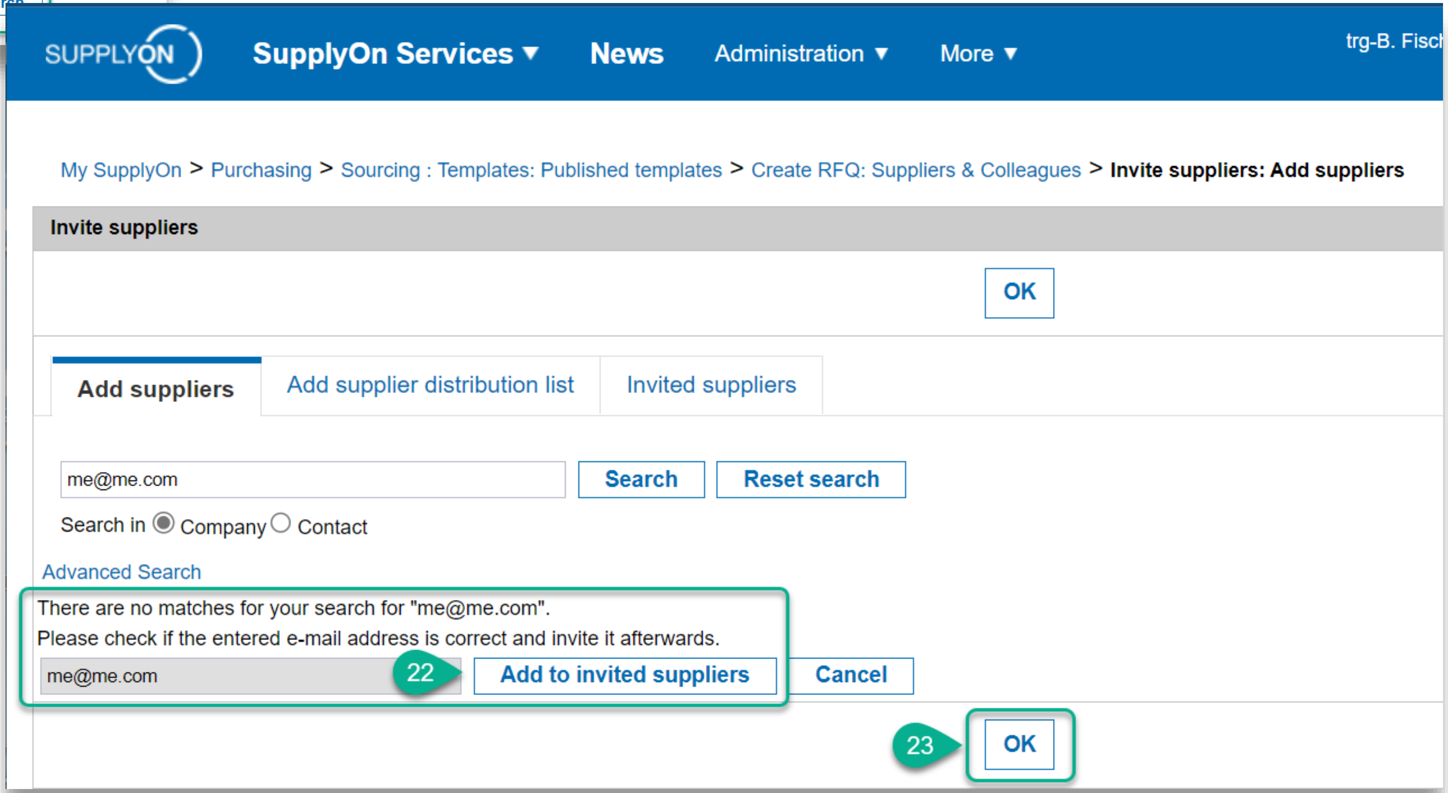
- registered suppliers
- unregistered suppliers
- colleagues

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....

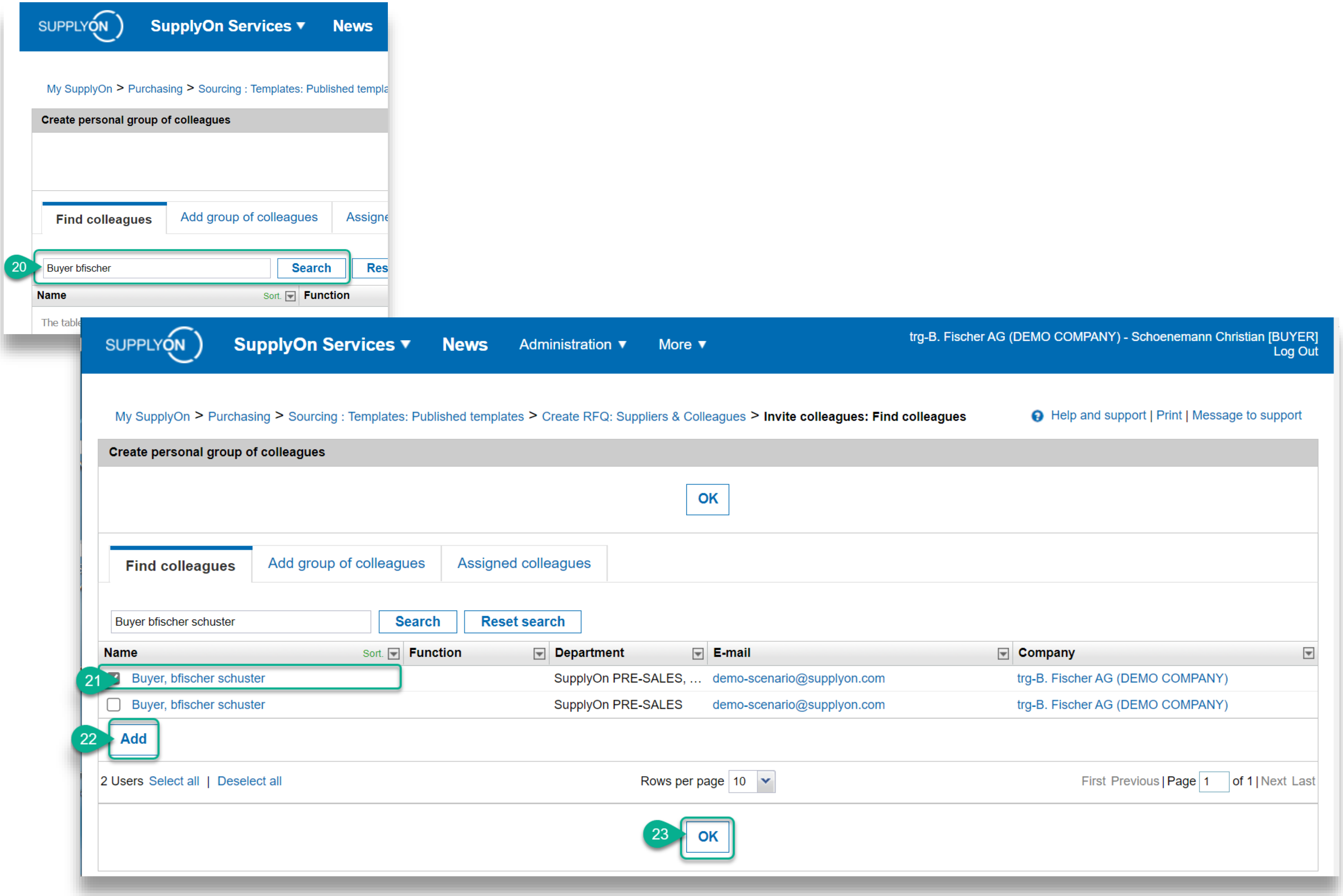
21. Enter a validated email adress of a person or post-box on supplier side (e.g. me@me.com) & click „Search“

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 emailadress can be used to simulate a supplier.

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



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

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

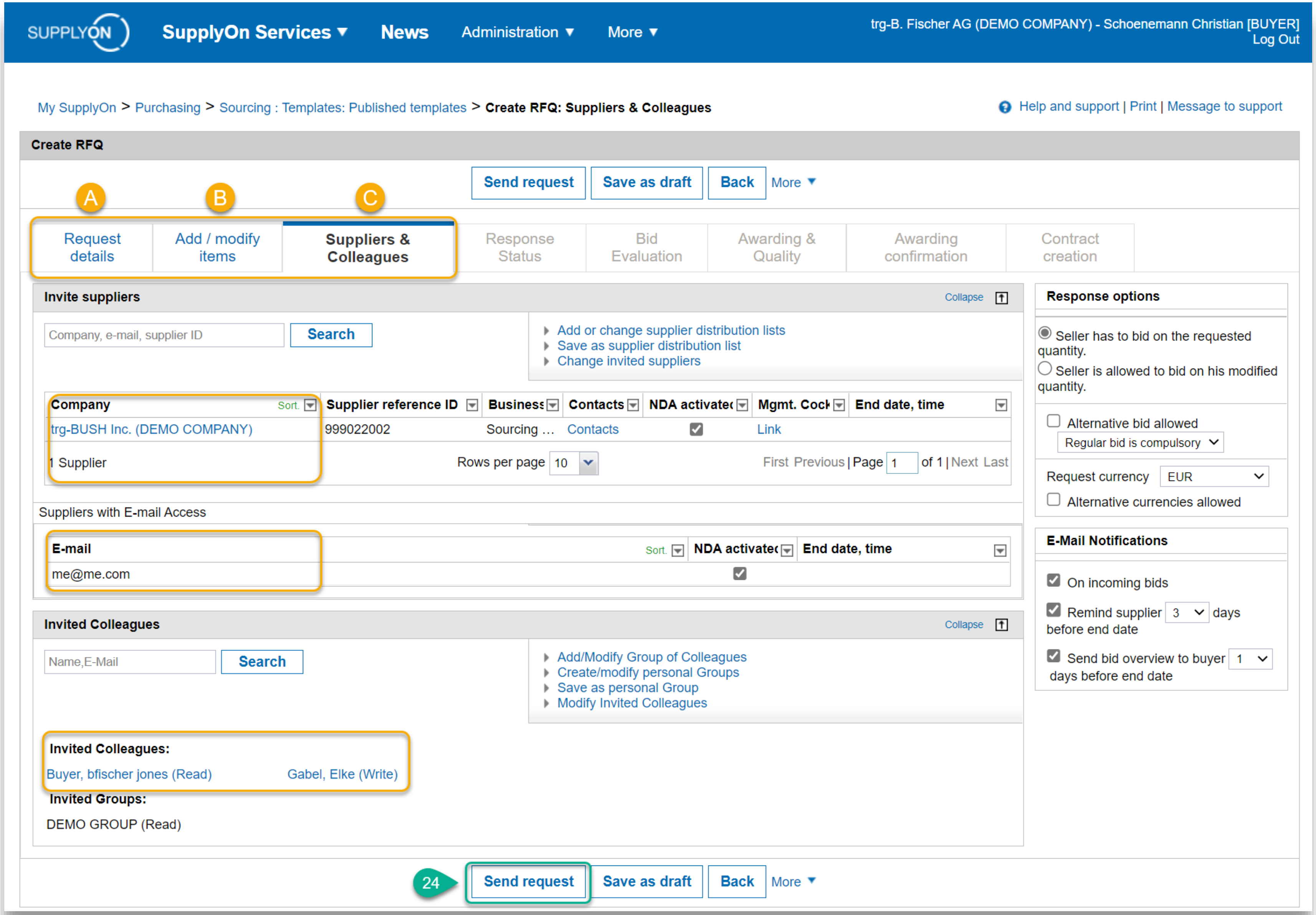
21. The list of detected colleagues is displayed. Choose the relevant ones by setting a flag...

22. Click „Add“...

23. ...and OK

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

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



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

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

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											
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11											
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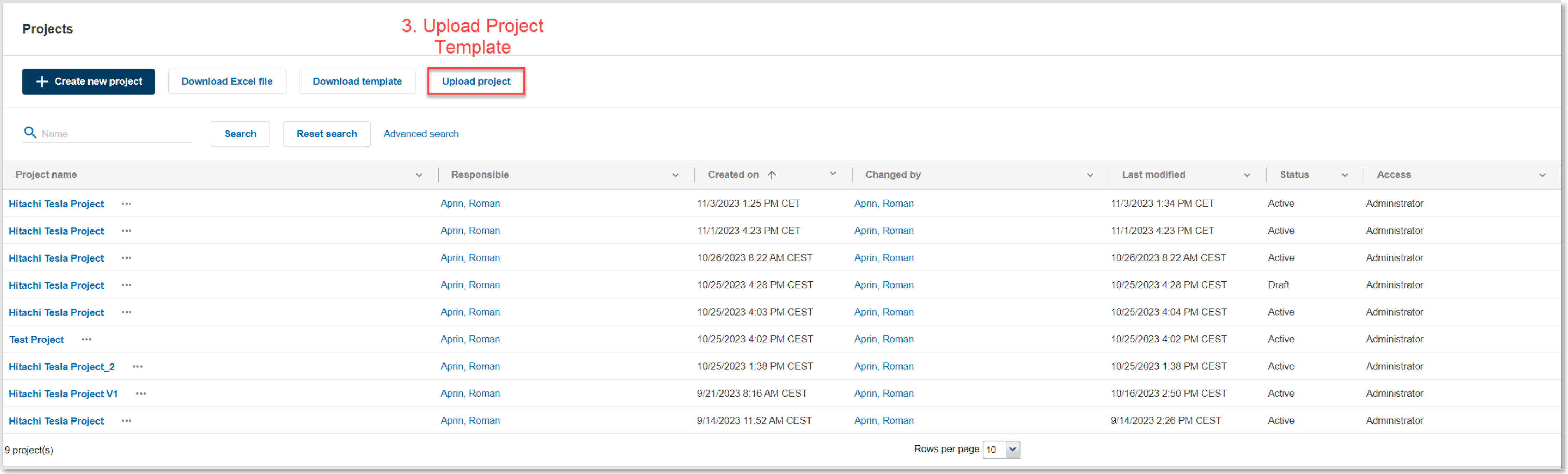
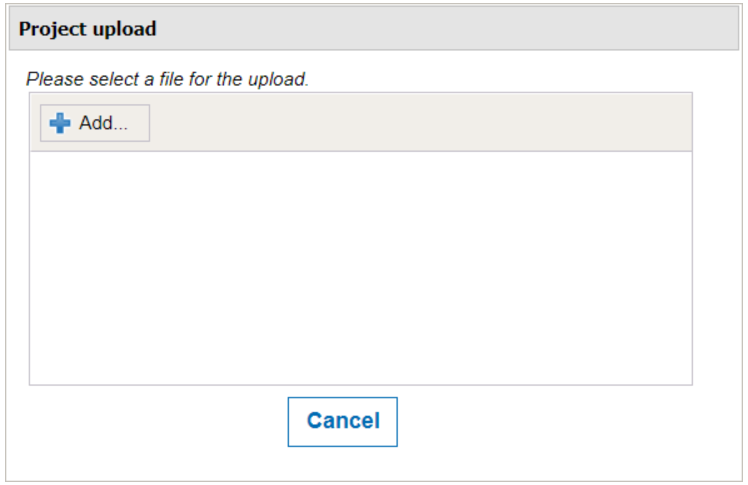
Project details | Project bill of materials items

Steps 2:

- Open Project Template
- Provide Project Information & Save

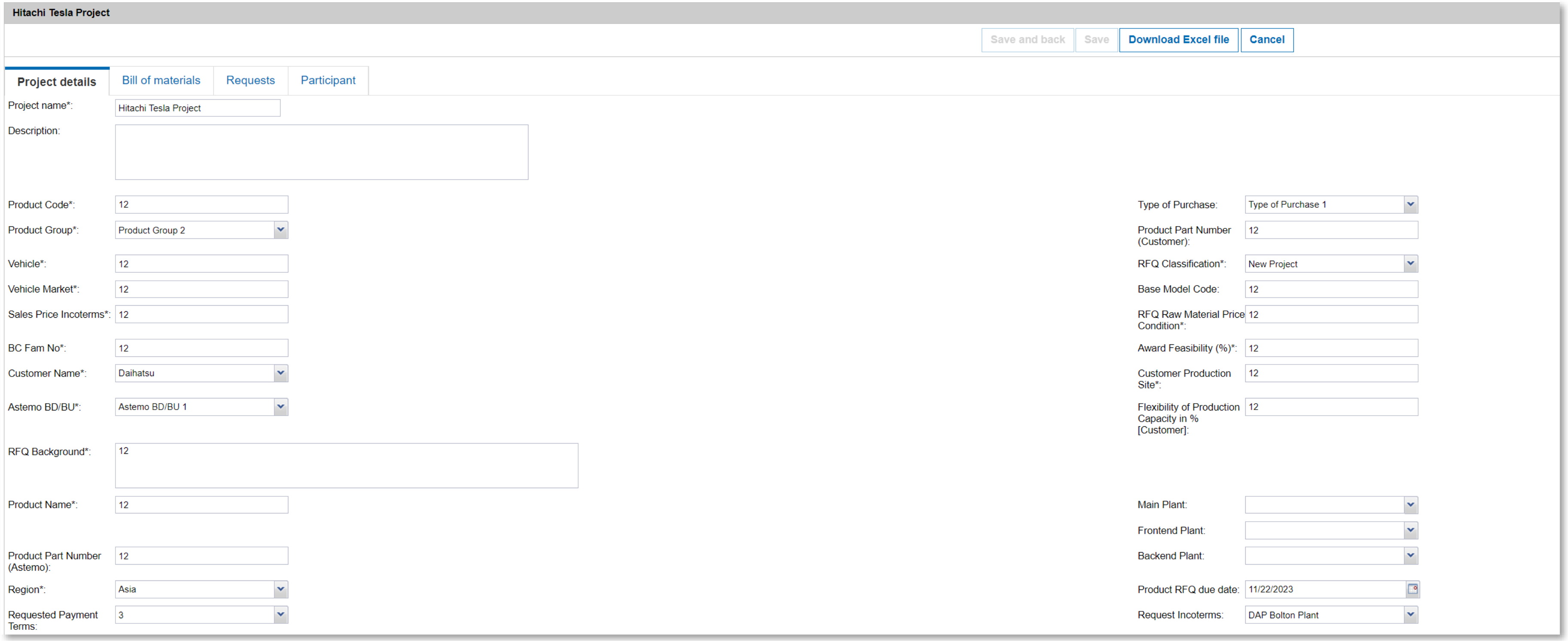
Sourcing – „Quick Guide“: Upload Project – 3/4





Steps 3:
- Click on “Upload Project”
- Add Project Template as xlsx. file

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



Steps 4:

- Check Project Information

Any Questions

SupplyOn AG
Roman Aprin
Ludwigstraße 49
85399 Hallbergmoos

Roman.Aprin@SupplyOn.com