

# Quick Guide for the SupplyOn Service Document Management System

April, 2024



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# 1 About this manual

This manual serves as a guide on how to use the SupplyOn Document Management system for exchanging documents between buyers and sellers (suppliers). It explains step-by-step procedures and offers valuable insights into document interchange processes.

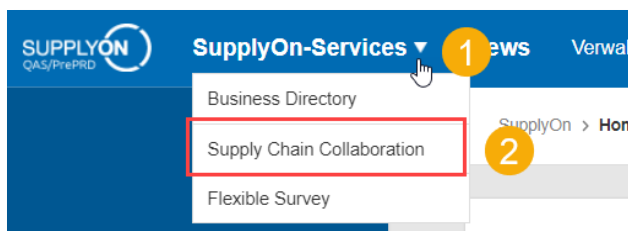
By following the instructions provided in this manual, users can improve collaboration and achieve effective communication within the supply chain, promoting efficiency and transparency in document management practices.

## 1.1 Typographical and Graphical Conventions

The following typographical conventions are used throughout this manual:

Example	Meaning
<b>Screen Text</b>	Text visible in the user interface is shown <b>bold</b> .
<i>Reference</i>	References are displayed in <i>italics</i> .

The following graphical convention is used throughout the manual:



**Figure 1** Red borders are used to indicate special areas. Orange numbered circles are used to indicate steps. These are not part of the User Interface.

## 2 Working with the Document Management System

The SupplyOn Document Management System (DMS) is a system for receiving, tracking, managing, and storing documents efficiently and easily.

In this context, a document is defined as a *container-object* designed for the transmission of information (files) from the buyer (sender) to one or more suppliers (receivers). It encompasses metadata (a set of information describing and providing details about other data) and various file attachments, such as .PDF, .DRW, .TIFF, etc.

### 2.1 Document Management Overview

To access the Document Management System, follow these steps.

1. Login to SupplyOn. In the Dashboard, click on the arrow in the **Document Management** tile.

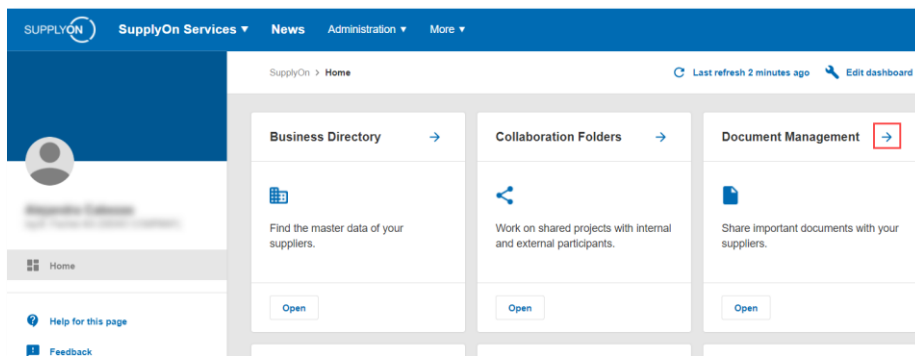


Figure 2 Access to Document Management.

The items shown in the dashboard may vary depending on the roles your user account has been assigned to.

2. The Document Management Overview is shown.

My SupplyOn > Document Management: All documents Help and support | Print | Message to support  
Act as substitute

All documents Create document/process

Hierarchical view Table profiles: SupplyOn default

Advanced search

Type	Name/no.	Version	Title	Status	Release date	Delivery date	Sort	Responses
<input type="checkbox"/> Package	HT_PACKAGE-2-SELLER_Material119900	1.0	HT_PACKAGE-2-SELLER_Material1...	Published	7/25/2023	7:49 AM CEST		1 Responses
<input type="checkbox"/> General	Design Change	1	Design Change of Cylinder Housing	Published	1/20/2023	1/20/2023 3:51 PM CET		0 Responses
<input type="checkbox"/> General	Contract_RailSupply	1	Contract_RailSupply	Published	2/26/2019	2/26/2019 10:39 AM CET		1 Responses
<input type="checkbox"/> Quality	SCBZ-Q-20172404-001	1	Périmètre Audit Qualité	Published	4/24/2017	4/24/2017 9:39 AM CEST		1 Responses
<input type="checkbox"/> Standard	6543 v2	v3	Please acknowledge	Published	11/20/2014	11/20/2014 11:30 AM CET		3 Responses
<input type="checkbox"/> Standard	6543 v2	002	Please acknowledge	Published	11/18/2014	11/18/2014 1:58 PM CET		3 Responses
<input type="checkbox"/> Drawing	PO B20131017 Drawing	1	COMPLETE RESERVOIR-CAP	Published	10/17/2013	10/17/2013 2:46 PM CEST		
<input type="checkbox"/> Drawing	PO_2011.003_Drawing	01	BRAKE FLUID RESERVOIR BASIC	Published	10/15/2011	10/27/2011 2:56 PM CEST		0 Responses
<input type="checkbox"/> Standard	Norm	AA	verpackungsnorm	Published	11/8/2010	4:13 PM CET		

9 Documents   Rows per page 20 | Page 1 of 1 | Next Last

Figure 3 Document Management Overview.

The platform displays the available documents in a list, with each column providing relevant information about the respective documents.

- Use the search bar to locate documents by their name. Use the **Advanced search** function to refine your search based on document type, status, or any other relevant features.

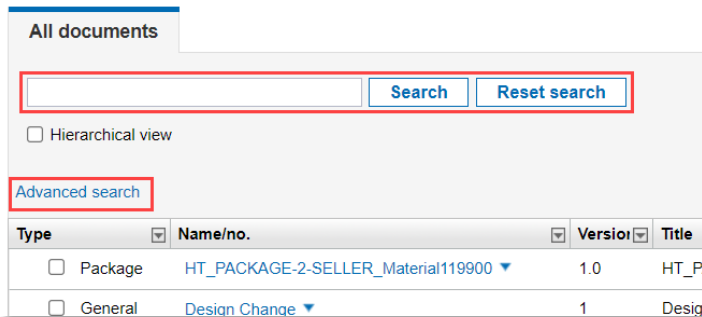


Figure 4 Search bar with *Advanced Search* function.

- Save your search profile by clicking on the arrow shown in *Figure 5* and selecting the **Save current settings** option. Your search profile will be saved and available for your next login.

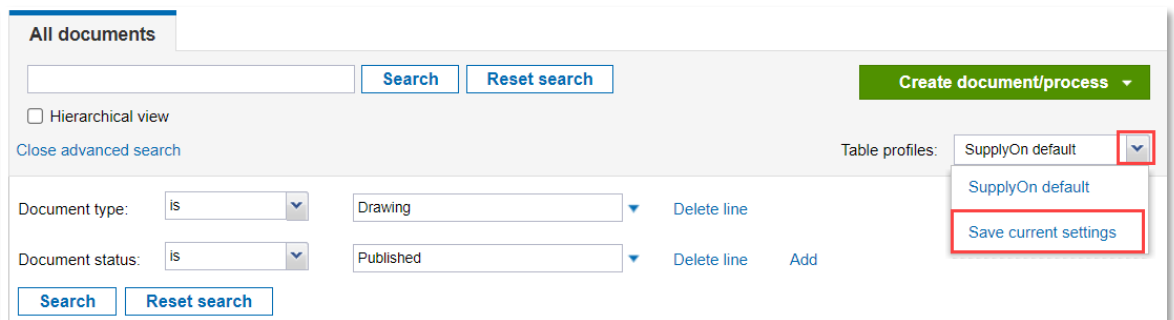


Figure 5 Saving search profile.

- Click on any of the documents to see additional details.

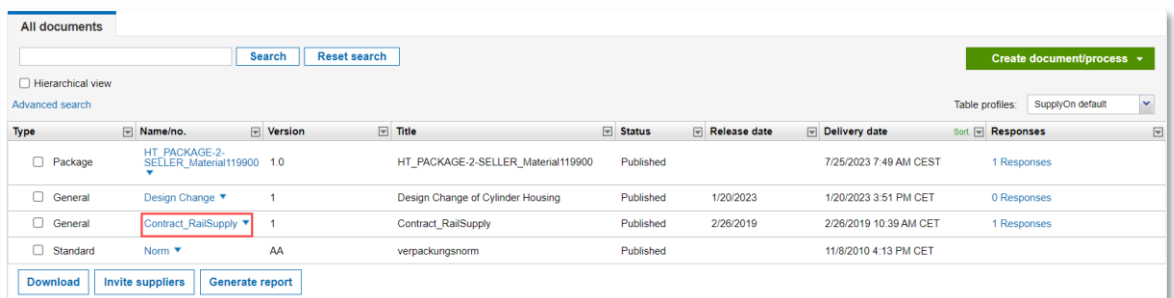


Figure 6 Accessing document details.

My SupplyOn > Document Management: All documents > Contract\_RailSupply (1): Document details Help and support | Print | Message to support

**Document**

[Back](#) More ▾

**Document details** | [Suppliers and colleagues](#) | [History and references](#)

**Document details** Collapse [ ]

Type:*	General	Delivery date:	Feb 26, 2019 10:39:07 AM
Document name/number:*	Contract_RailSupply	Last modified:	Feb 26, 2019 10:39:07 AM
Version: *	1	Company:	trg-B. Fischer AG (DEMO COMPANY)
Status:	Published	Contact:	Buyer, bfischer.schuster
Release Date:	2/26/2019	Valid to:	2/26/2020
Title:	Contract_RailSupply		
Description:	Contract_RailSupply		
Material number:	-		
Files*:	<a href="#">Details</a> Contract Spare Parts for Rail docx (EN, 11 KB);		

**Response options**

Confirmation required  
 No response required  
 Subscription allowed

**E-mail notification settings**

Supplier notification  
 Once a day ▾  
 Remind supplier  
 1 / 2 / 3 X/Y/Z days after sending  
 Response notification  
 Once a day ▾

Figure 7 Document details.

- The response column shows the number of responses from suppliers. Click on any of the document's responses to see more information.

All documents [Search](#) [Reset search](#) [Create document/process ▾](#)

Hierarchical view

Advanced search Table profiles: SupplyOn default ▾

Type	Name/no.	Version	Title	Status	Release date	Delivery date	Sort	Responses
<input type="checkbox"/> Package	HT_PACKAGE-2-SELLER_Material119900	1.0	HT_PACKAGE-2-SELLER_Material119900	Published		7/25/2023 7:49 AM CEST		1 Responses
<input type="checkbox"/> General	Design Change ▾	1	Design Change of Cylinder Housing	Published	1/20/2023	1/20/2023 3:51 PM CET		0 Responses
<input type="checkbox"/> General	Contract_RailSupply ▾	1	Contract_RailSupply	Published	2/26/2019	2/26/2019 10:39 AM CET		1 Responses
<input type="checkbox"/> Standard	Norm ▾	AA	verpackungsnorm	Published		11/8/2010 4:13 PM CET		

[Download](#) [Invite suppliers](#) [Generate report](#)

Figure 8 Accessing response details.

My SupplyOn > Document Management: All documents > HT\_PACKAGE-2-SELLER\_Material119900 (1.0): Process details Help and support | Print | Message to support

**Process**

[Back](#) More ▾

**Process details** | [Linked documents](#) | [Suppliers and colleagues](#) | [History and references](#)

**Process response** Collapse [ ]

Response from:	trg-SEC Tools Ltd. (DEMO COMPANY)	Last modified:	9/2/2023 6:05:31 PM CEST
Changed by:	Adams, John	Status:	Accepted

**Process details** Collapse [ ]

Type:*	Package	Delivery date:	Jul 25, 2023 7:49:05 AM
Name/no.:	HT_PACKAGE-2-SELLER_Material119900	Last modified:	Jul 25, 2023 7:49:05 AM
Version: *	1.0	Company:	trg-B. Fischer AG (DEMO COMPANY)
Status:	Published	Contact:	Schoenemann (1), Christian [BUYER]
Title:	HT_PACKAGE-2-SELLER_Material119900		
Description:	Please confirm the receipt of package for Material119900		

**Response options**

Confirmation required  
 No response required

**E-mail notification settings**

Supplier notification  
 Immediately ▾  
 Remind supplier  
 3 / 7 / 14 X/Y/Z days after sending  
 Response notification  
 Immediately ▾

Figure 9 Document details.

## 2.2 How to create a new document

Documents can be created from pre-existing templates. In this section three types of documents exchange are described:

1. Sending documents or files to suppliers
2. Sending a pre-negotiated file to a supplier
3. Requesting files from supplier

**Hitachi Astemo Note:** Please note that, while the procedure remains similar, the templates available in your overview may vary to the ones shown in this guide.

### 2.2.1 Send documents/files to supplier(s)

Within the Document Management System (DMS), buyers can send documents and files to suppliers while requesting confirmation (Also known as *push file*).

The following actions can be performed by the *buyer*:

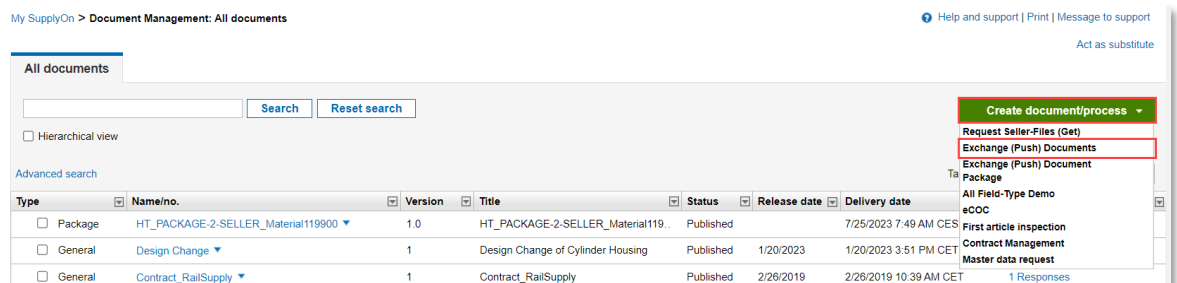
- Request supplier confirmation (if configured).
- Set due date & enable auto-confirmation (if configured).
- Set supplier notification/reminder sequence.
- Set my personal response notification sequence.
- Track the status of the supplier confirmation or auto-acceptance (if set).

*Suppliers*, on the other hand, can perform the following actions:

- Receive documents/files and download them.
- Confirm or decline them (if required).

The following steps explain in detail how to create a new document and send it to a supplier.

1. To send a new document to a supplier, click on **Create new document/process**. A list of available templates will be shown, select a template – e.g. **Exchange (Push) Documents** (Note: The name of the template may differ in your overview, consult with your company administrator for more details).



**Figure 10** Create document/process button.

2. An empty template will be shown. Select the type of document you want to share and fill in all the relevant data. Mandatory fields are marked with a \*.

- Upload the document in the *Files* section of the template either by clicking on **Upload** and selecting the file from your computer, or by drag-and-drop.

Figure 11 Create document: Document details.

- The chosen document will appear in a separate window. Provide a description and language information, then click **OK**.

File name	Created by	Uploaded on	Description	Language	Size
<input type="checkbox"/> Drawing Demo for DMS User guide.pdf	trg-B. Fischer AG (DEMO COMPANY)	2/19/2024 5:41 PM CET	Drawing demo Part No. 174393643	English	187 KB

Figure 12 Manage attachments.

- In the **Add suppliers** tab you can define which suppliers will receive the document. Enter the supplier's name in the search bar, select it from the list and click on **Add to "invited suppliers"**. Finally, click on **Ok** to save your changes.

Name	Supplier reference ID	City	Country	Corporate Group	Customer responsible
<input type="checkbox"/> trg-Dehnen (DEMO COMPANY)	999022002	Barcelona	ES	Bullfinch (DEMO COMPANY)	Show contact data
<input type="checkbox"/> trg-Dehnen Karl Mayer Ges.m.b.H. (DEMO COMPANY)		Leoben	AT	trg-Dehnen Karl Mayer Ges.m.b.H.	Show contact data
<input type="checkbox"/> trg-Franz Fran Plastertechnik System (DEMO COMPANY)		Castrop-Rauxel	DE	trg-Franz Fran Plastertechnik S.	Show contact data
<input checked="" type="checkbox"/> trg-SEC Tools Ltd. (DEMO COMPANY)	056881230	München	DE	SEC Tools Ltd.	Show contact data
<input type="checkbox"/> trg-STR Group (DEMO COMPANY)		Shanghai	CN	STR Group	Show contact data
<input type="checkbox"/> trg-Sieber SA (DEMO COMPANY)		Waiblingen	DE	Sieber GmbH	Show contact data

Figure 13 Invite suppliers: Add suppliers overview.



- Once added, the supplier will appear on the supplier list. It is important to note that suppliers do not have access to this list; it is only visible to the buyer. Additionally, you have the option to invite colleagues to access the document's information.

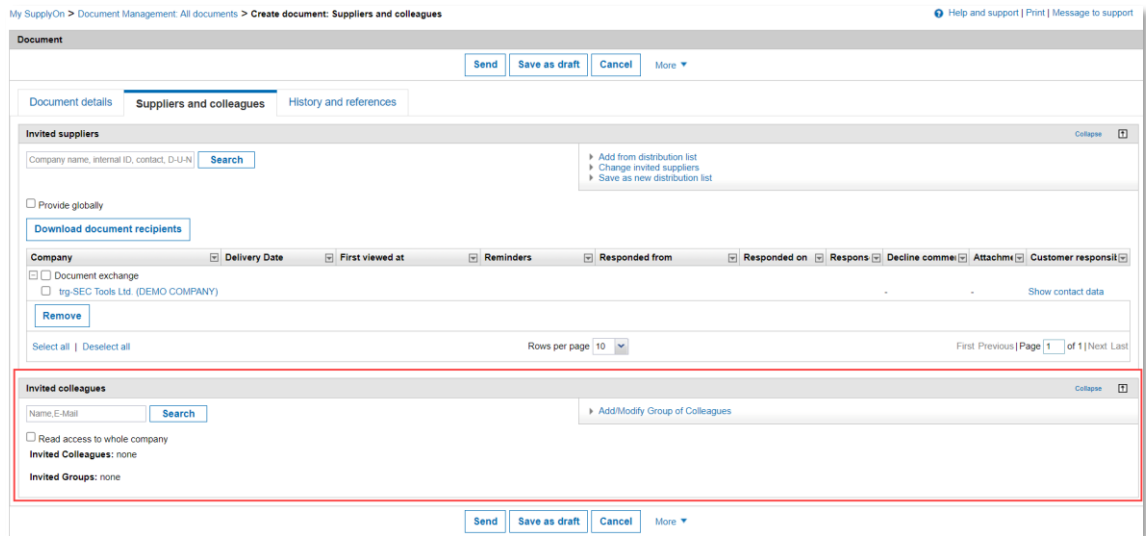


Figure 14 Suppliers and colleagues tab overview.

- Once all the document details have been arranged, click on **Send**. The supplier will now receive the document and all attached files.

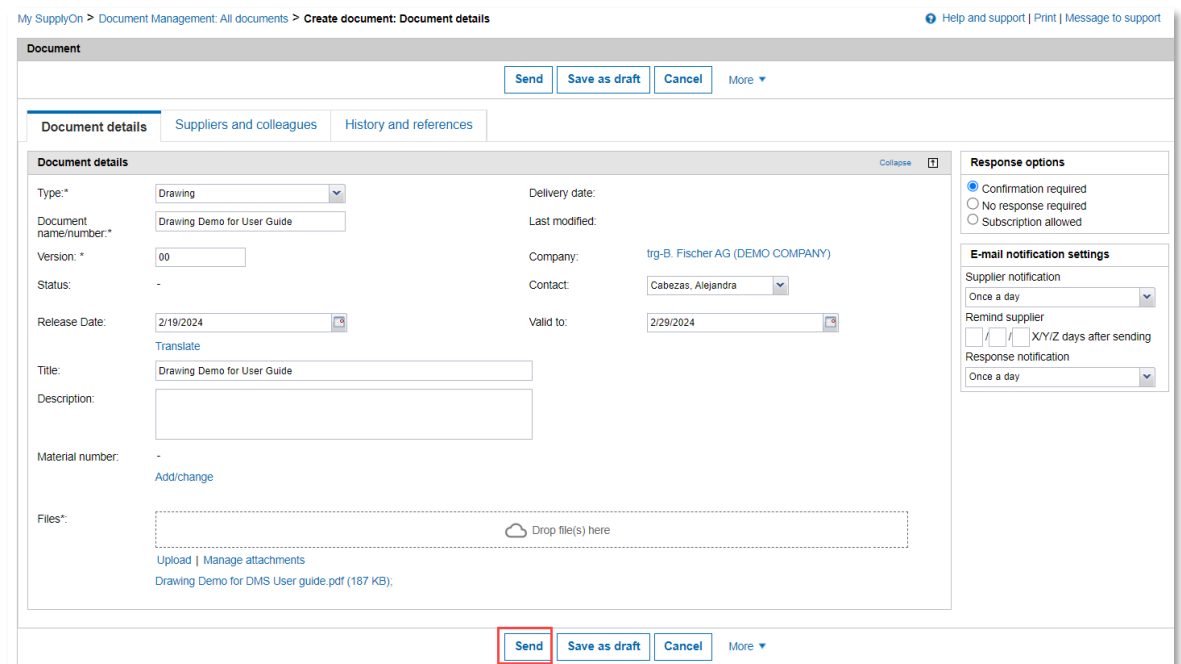


Figure 15 Send button.

8. The document will appear in the Document Management overview with the status as *Published*. The supplier will receive the document and respond to it accordingly. Once the supplier has submitted his response the column *Responses* will be automatically updated.

My SupplyOn > Document Management: All documents Help and support | Print | Message to support

You have sent the document Drawing Demo for User Guide. Act as substitute

All documents Create document/process

Hierarchical view

Advanced search Table profiles: SupplyOn default

Type	Name/no.	Version	Title	Status	Release date	Delivery date	Sort	Responses
<input type="checkbox"/> Drawing	Drawing Demo for User Guide	00	Drawing Demo for User Guide	Published	2/19/2024	2/19/2024 9:52 PM CET		0 Responses
<input type="checkbox"/> Package	HT_PACKAGE-2-SELLER_Material119900	1.0	HT_PACKAGE-2-SELLER_Material119900	Published		7/25/2023 7:49 AM CEST		1 Responses
<input type="checkbox"/> Standard	Norm	AA	verpackungsnorm	Published		11/8/2010 4:13 PM CET		

10 Documents   Rows per page: 20 First Previous | Page 1 of 1 | Next Last

Figure 16 Sent document.

## 2.2.2 Sending a pre-negotiated document/file to a supplier

Buyers can also send a side-agreement to supplier (for example a contract), get feedback, and do advanced collaboration for commonly agreed files.

The following actions can be performed by the *buyer*:

- Send a document/file and request an updated file.
- Provide an acceptance status (yes/no).
- Allow upload of one or several attachments.
- Set supplier notification/reminder sequence.
- Set my personal response notification sequence.

*Suppliers*, on the other hand, can perform the following actions:

- Set status to „in processing“ & provide a short comment.
- Download document/file.
- Upload file to the document (e.g. adjusted version of a standard).
- Save and „send feedback“

The process of creating a new document for a Side Agreement closely mirrors the steps for creating and sending a regular document (refer to [Section 2.2.1](#)). The subsequent steps will guide you through the process of generating a pre-negotiated document and sending it to a supplier.

1. Click on **Create new document/process**. A list of available templates will be shown, select the option **Contract Interchange** (Note: The name of the template may differ in your overview, consult with your company administrator for more details).

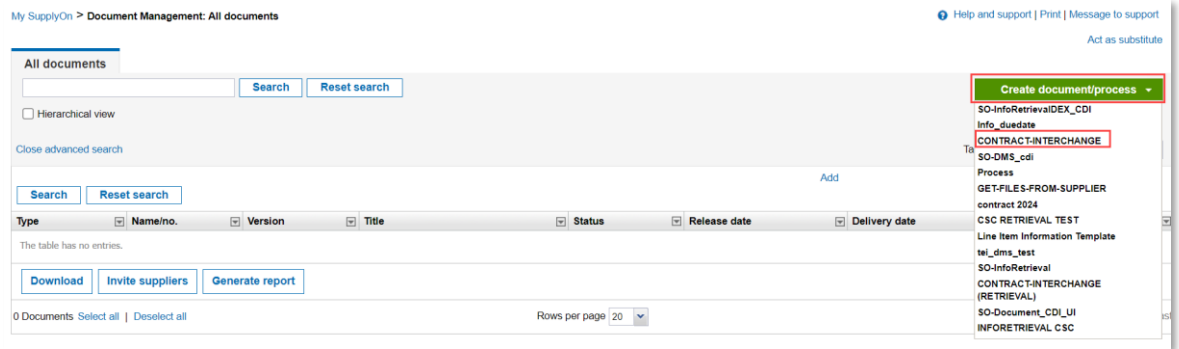


Figure 17 Create document/process button.

2. An empty template will be shown. Select the type of document you want to share and fill in all the relevant data, as well as the handling instructions and document description. Mandatory fields are marked with a \*.
3. Upload the document in the *Contract Proposal* section of the template either by clicking on **Upload** and selecting the file from your computer, or by drag-and-drop.

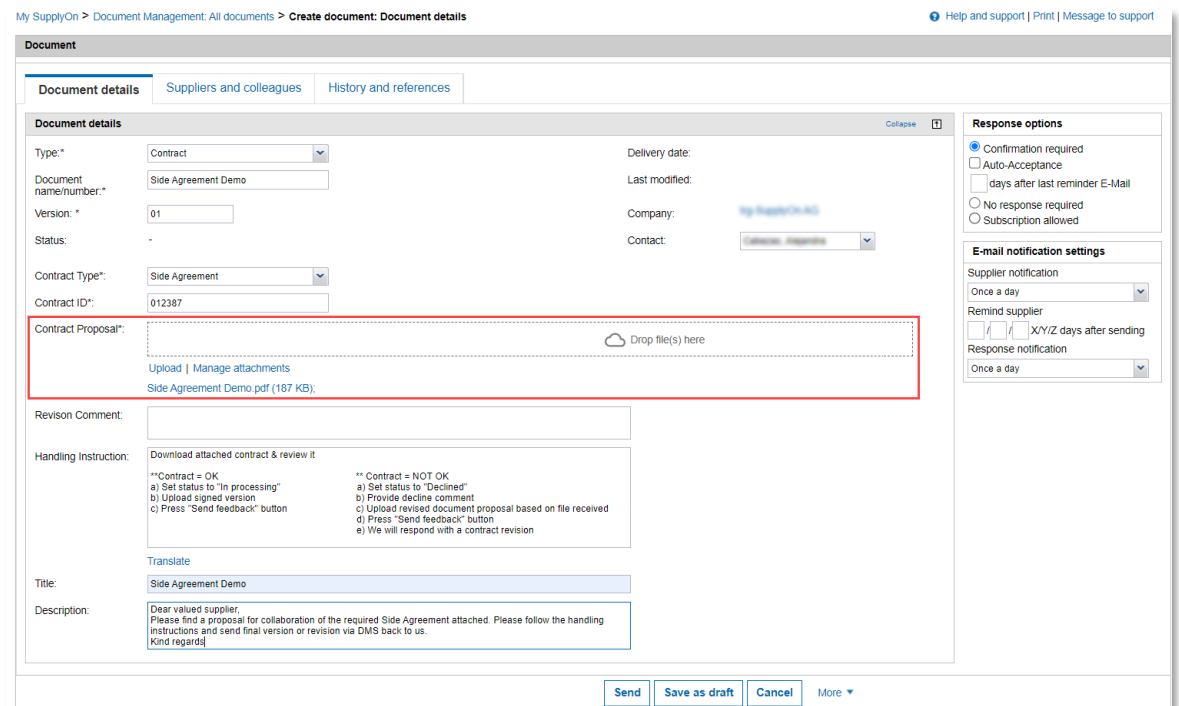


Figure 18 Create document: Document details.

4. Define the suppliers and colleagues who will receive the document and have access to its information in the **Supplier and colleagues** tab. Once added, the supplier will appear on the supplier list. It is important to note that suppliers do not have access to this list; it is only visible to the buyer. Once all the document details have been arranged, click on **Send**. The supplier will now receive the document and all attached files.

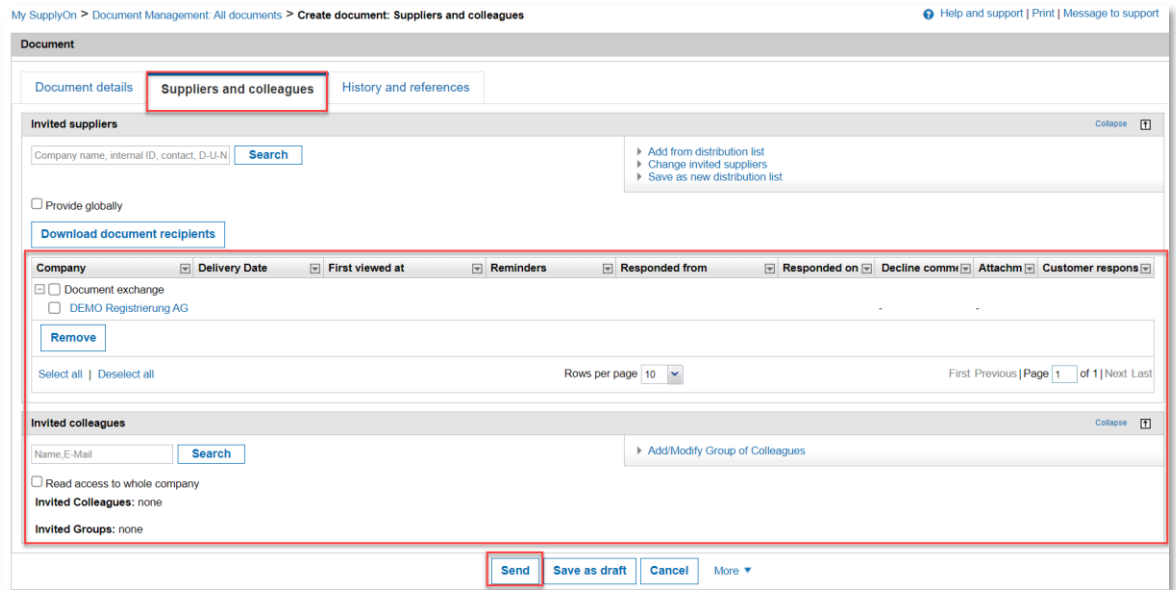


Figure 19 Suppliers and colleagues tab.

- The document will appear in the Document Management overview with the status as *Published*. The supplier will receive the document and respond to it accordingly. Once the supplier has submitted his response the column *Responses* will be automatically updated.

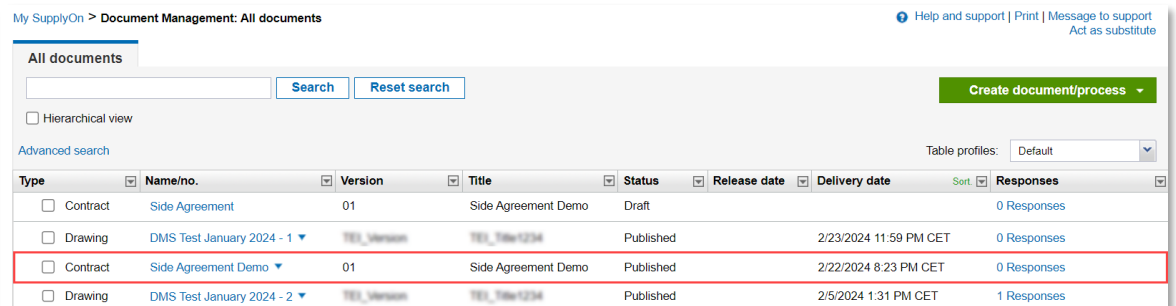


Figure 20 Sent document.

Once the supplier has downloaded and reviewed the document, he will either accept it and upload a signed version of the document (if required) or decline it and upload a revised version of the document (if applicable).

To see the supplier's response to a document previously sent:

- Go to the Document Management overview and search for the respective document in the list, if the document has a response this will be shown in the column *Responses*. Click on **1 Responses**.

My SupplyOn > Document Management: All documents Help and support | Print | Message to support  
Act as substitute

All documents Create document/process

Hierarchical view Table profiles: SupplyOn default

Advanced search

Type	Name/no.	Version	Title	Status	Release date	Delivery date	Sort	Responses
<input type="checkbox"/> Standard	Project Agreement	01		Draft				0 Responses
<input type="checkbox"/> General	Design Change	1	Design Change of Cylinder	Published	1/20/2023	1/20/2023 3:51 PM CET		0 Responses
<input type="checkbox"/> General	Contract_RailSupply	1	Contract_RailSupply	Published	2/26/2019	2/26/2019 10:39 AM CET		1 Responses

Figure 21 Document Management Overview: Responses column.

- The supplier's activity within the document context will be shown. The *Response status* column shows the response of the supplier. If the supplier responded with a revised version of the document this will be shown in the *Attachments* column. Click on **Attachments (1)** to see the revised document.

My SupplyOn > Document Management: All documents > Contract\_RailSupply (1): Suppliers and colleagues Help and support | Print | Message to support

Document

Document details **Suppliers and colleagues** History and references

Inited suppliers Collapse

Company	Delivery Date	First viewed at	Responded from	Responded on	Response status	Decline comment	Attachments	Customer responsible
<input type="checkbox"/> Document exchange								
<input type="checkbox"/> trp-SEC Tools Ltd. (DEMO COMPANY)	2/26/2019 10:39 AM	3/10/2023 10:56 ...	1... Adams, John	3/10/2023 10:58 AM	Declined	N/A	Attachments (1)	Show contact data

Select all | Deselect all Rows per page 10 First Previous | Page 1 of 1 | Next Last

Figure 22 Suppliers response details.

- Go to the **Document details** tab. To respond with a new version of the document click on **More** and select the option **Create version**. This will create an updated version in the SupplyOn System, modify the data, if necessary, change the version number and upload the new revised document. Click on **Send** to transmit the new version to the supplier.

My SupplyOn > Document Management: All documents > Contract\_RailSupply (1): Document details Help and support

Document

**Document details** Suppliers and colleagues History and references

Document details Collapse

Type:*	General	Delivery date:	Feb 26, 2019 10:39:07 AM
Document name/number:*	Contract_RailSupply	Last modified:	Feb 26, 2019 10:39:07 AM
Version: *	1	Company:	trg-B. Fischer AG (DEMO COMPANY)
Status:	Published	Contact:	Buyer, bfischer schuster

Figure 23 Create new version of the document.

My SupplyOn > Document Management: All documents > Create document: Document details

Document

Send Save as draft Cancel More ▾

Document details Suppliers and colleagues History and references

Document details Collapse

Type:\* General

Document name/number:\* Contract\_RailSupply

Version: \* 02

Status: -

Release Date: 2/22/2024

Title: Contract\_RailSupply

Description: Contract\_RailSupply

Delivery date:

Last modified:

Company: trg-B. Fischer AG (DEMO COMPANY)

Contact: Cabezas, Alejandra

Valid to: 3/29/2024

Translate

Figure 24 New version of the document.

9. The supplier will receive the document and will repeat the revision process until a further acceptance of the document is achieved between both parties.
10. Once an agreement has been reached, set the status of a document as *closed* by clicking on the arrow next to the document name in the Management Document overview and selecting the option **Set status to "Closed"**.

My SupplyOn > Document Management: All documents

Help and support | Print | Mes

All documents

PROJECT-AGREEMENT\_55667788 Search Reset search Create document

Hierarchical view

Advanced search Table profiles: SupplyOn

Type	Name/no.	Version	Title	Status	Release date	Delivery date	Sort	Resp
<input type="checkbox"/> Contract	PROJECT-AGREEMENT_	0.2	COLLAB PROJECT-AGRE...	Open		11/28/2023 7:56 PM...		1 Re
<input type="checkbox"/> Contract			COLLAB PROJECT-AGRE...	Closed		11/28/2023 7:51 PM...		1 Re

Download Invite report

2 Documents Select all

Rows per page 20

First Previous | Page 1

Context menu for PROJECT-AGREEMENT\_:

- Create version
- Make a copy
- Create successor
- Set status to "Closed"
- Set status to "finalized"

Figure 25 Setting document status to "Closed".

### 2.2.3 Request documents/files from supplier

To request files from suppliers, buyers can also send a document request through the SupplyOn DMS platform.

The following actions can be performed by the *buyer*:

- Request attachments (files)
- Allow upload of one or several attachments.
- Set supplier notification/reminder sequence.
- Set personal response notification sequence.
- Track the status of the supplier confirmation or auto-acceptance (if set)

*Suppliers*, on the other hand, can perform the following actions:

- Upload files to the document received.
  - Save & send back
1. Click on **Create new document/process**. A list of available templates will be shown, select the option **Request Seller-Files (Get)** (Note: The name of the template may differ in your overview, consult with your company administrator for more details).

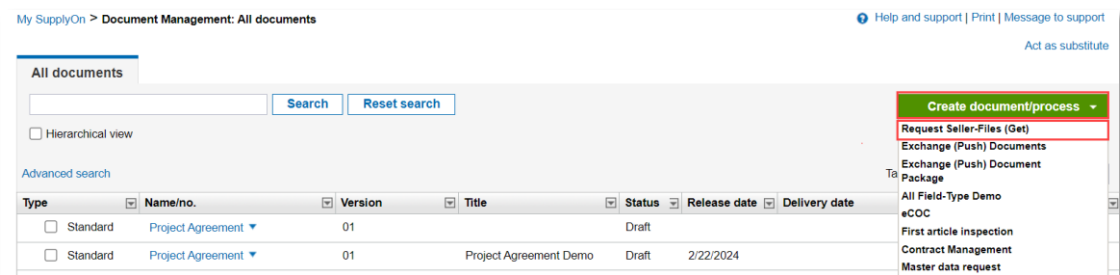


Figure 26 Create document/process button.

2. Select the type of document you want to request and fill in all the relevant data, as well as the desired response options. Mandatory fields are marked with a \*.

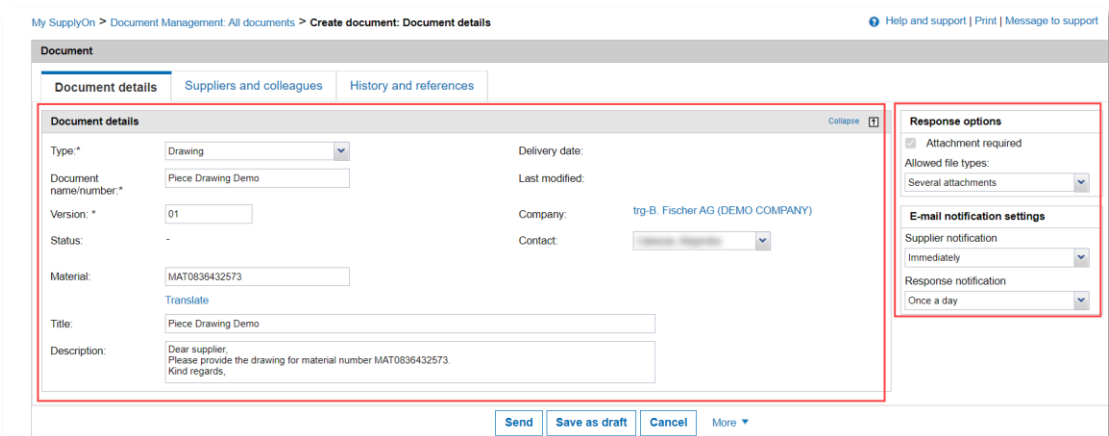


Figure 27 Create document: Document details.

- Define the suppliers and colleagues who will receive the document and have access to its information in the **Supplier and colleagues** tab. Once added, the supplier will appear on the supplier list. It is important to note that suppliers do not have access to this list; it is only visible to the buyer. Once all the document details have been arranged, click on **Send**. The supplier will now receive the document request.

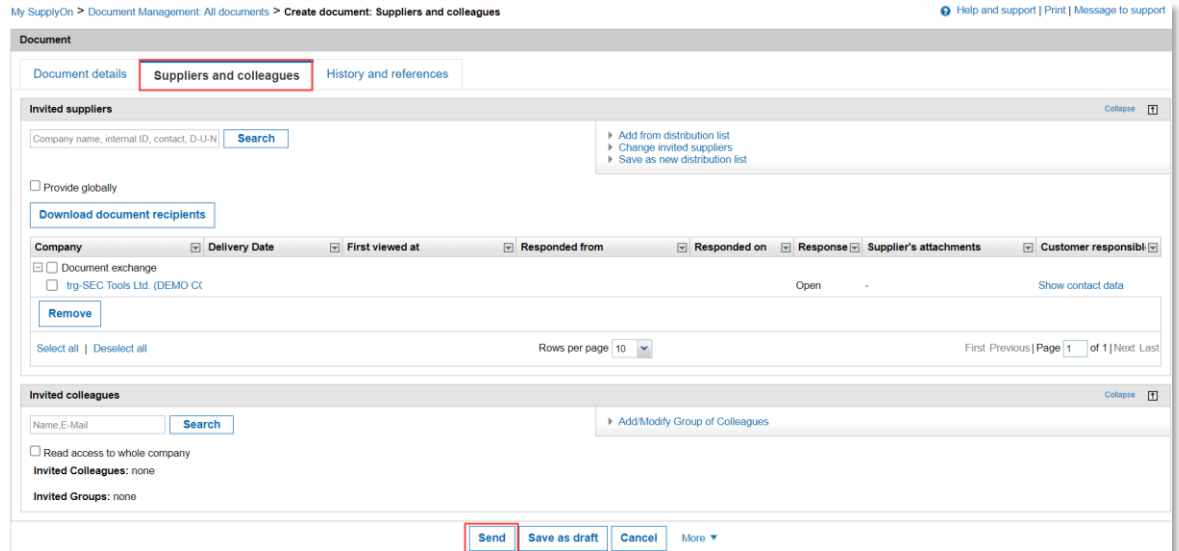


Figure 28 Suppliers and colleagues tab.

- The document request will appear in the Document Management overview with the status as *Open*. The supplier will receive the document request and respond by uploading the corresponding file. Once the supplier has submitted his response the column *Responses* will be automatically updated.

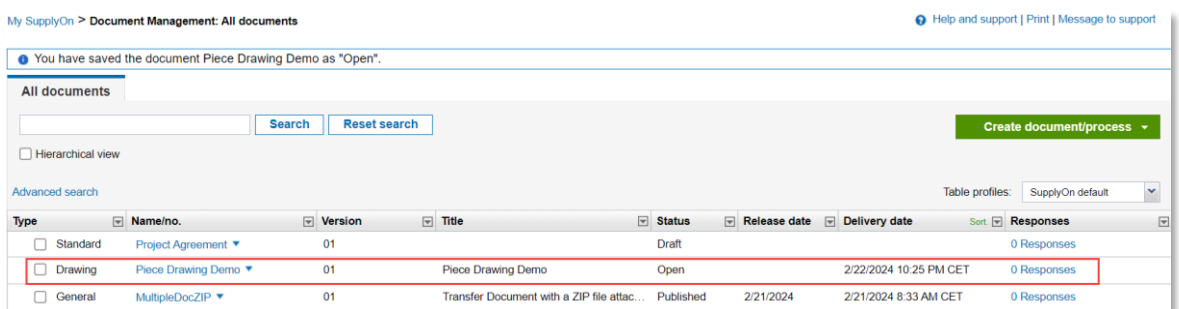


Figure 29 Sent document.



### 3 FAQs and SupplyOn Contact

#### ✓ Forgot password?

You can get a new password at any time.  
Therefore you need your user ID and your e-mail address.  
You get an e-mail including a link you must click within the next 24 hours.  
Subsequently you get directed to a website to specify your new password.  
You can start the process [here](#).

#### ✓ Forgot User ID?

You can get notified about your user ID at any time.  
Therefore, you need your first and last name and your e-mail address.  
You will receive an e-mail with your current user ID.

Important:

The e-mail address, first and last name must be stored at SupplyOn.  
Your spam filter must not block the e-mail.

Get your user ID [here](#).

#### ✓ "I need more roles or rights!"

There is at least one user administrator for each company using the SupplyOn services.  
Only this administrator can create users or manage roles and rights.  
You can find a list of the user administrators of SupplyOn in your company in the menu "administration", option "My user administrators".

Further frequently asked questions can be read [here](#).

Detailed information regarding the SO applications and navigation on the UI is provided on the [SO media library](#).

E-mail address for productive issues: <https://contact.supplyon.com/en/>

- Worldwide support in 9 languages (English, German, French, Spanish, Portuguese, Italian, Chinese, Japanese and Korean)
- 365 days/24 hours available