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
Screen Text	Text visible in the user interface is shown **bold**.
Reference	References are displayed in *italics.*

The following graphical convention is used throughout the manual:

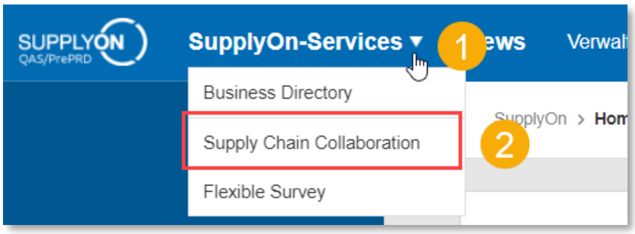

Figure 1 Red borders are used to indicate special areas. Orange numbered circles are used to indicate steps. These are not part of the User Interface.

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.

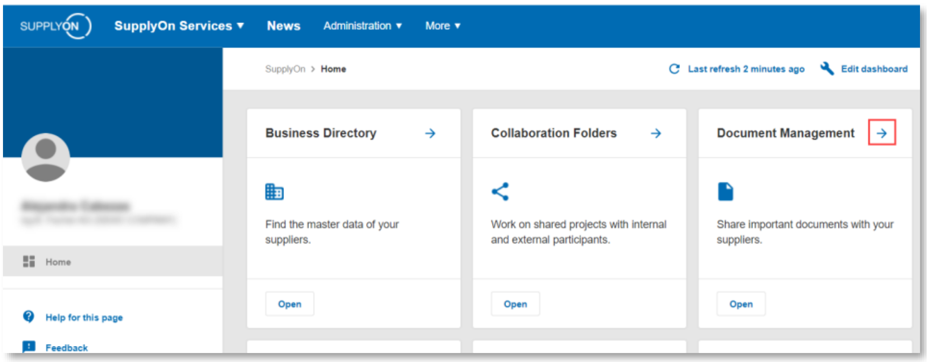

Figure 2 Access to Document Management.

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.

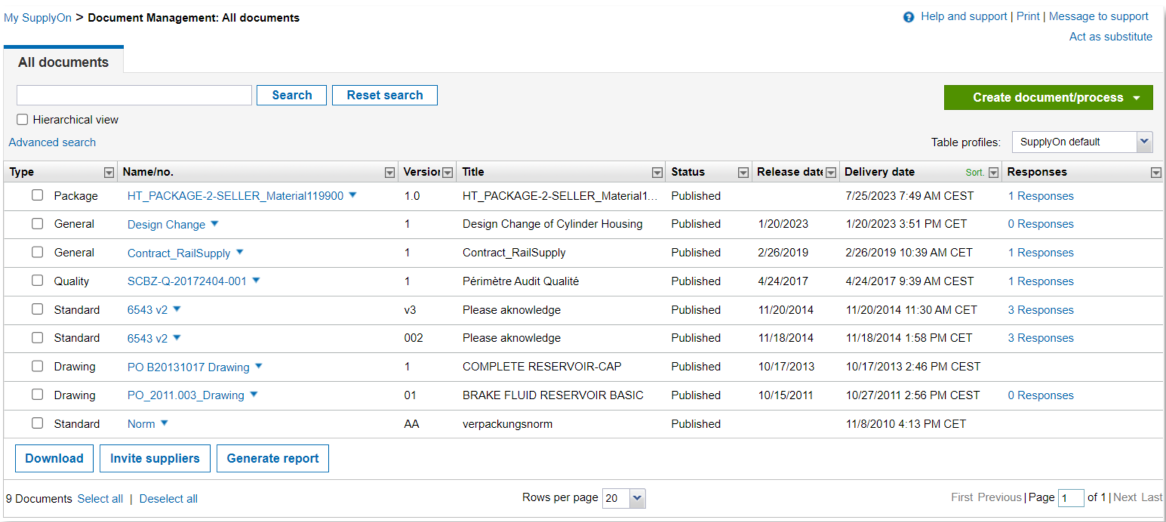

Figure 3 Document Management Overview.

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

3. 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.

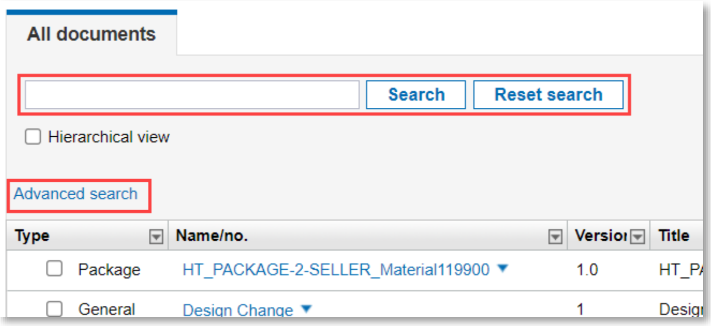

Figure 4 Seach bar with *Advanced Search* function.

4. 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.

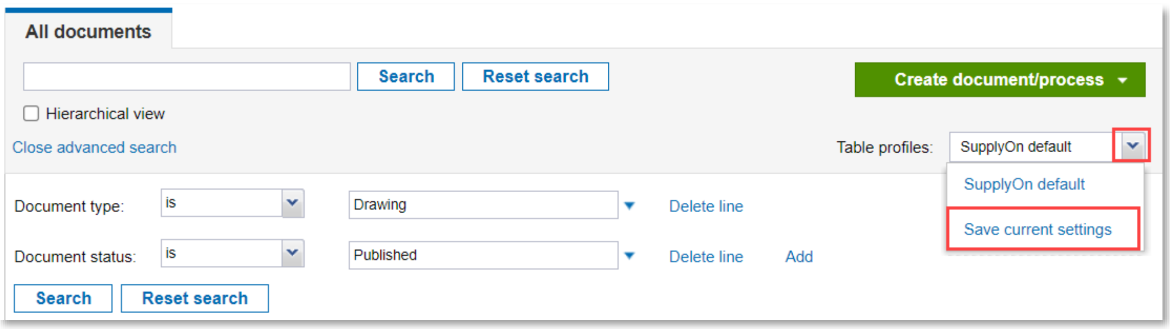

Figure 5 Saving search profile.

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

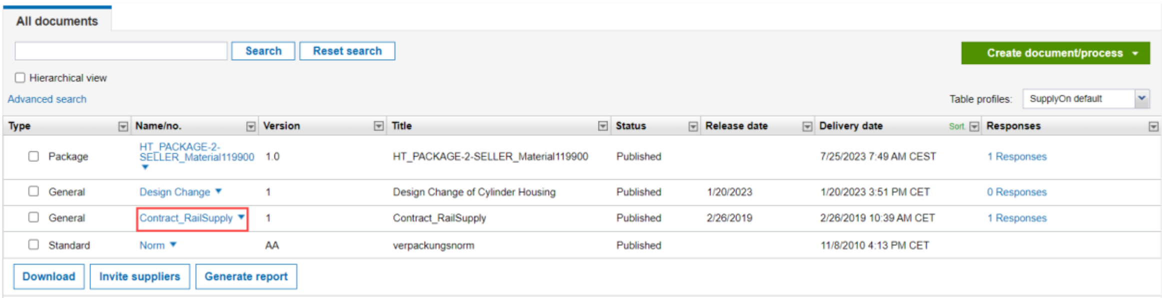

Figure 6 Accessing document details.

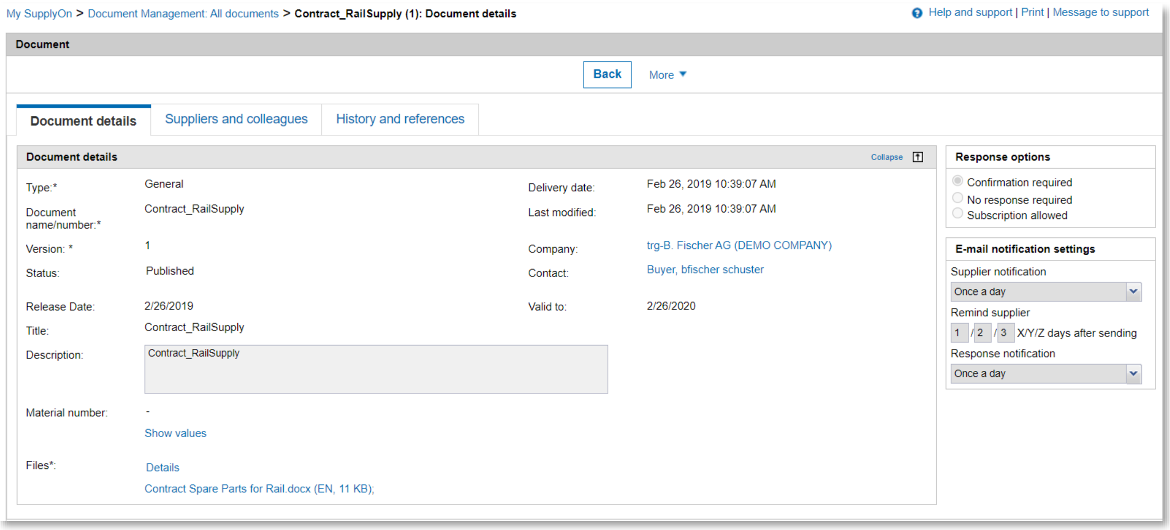

Figure 7 Document details.

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

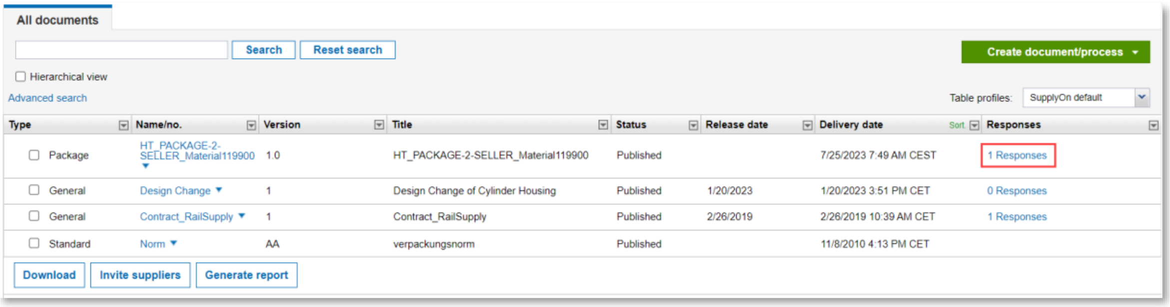

Figure 8 Accessing response details.

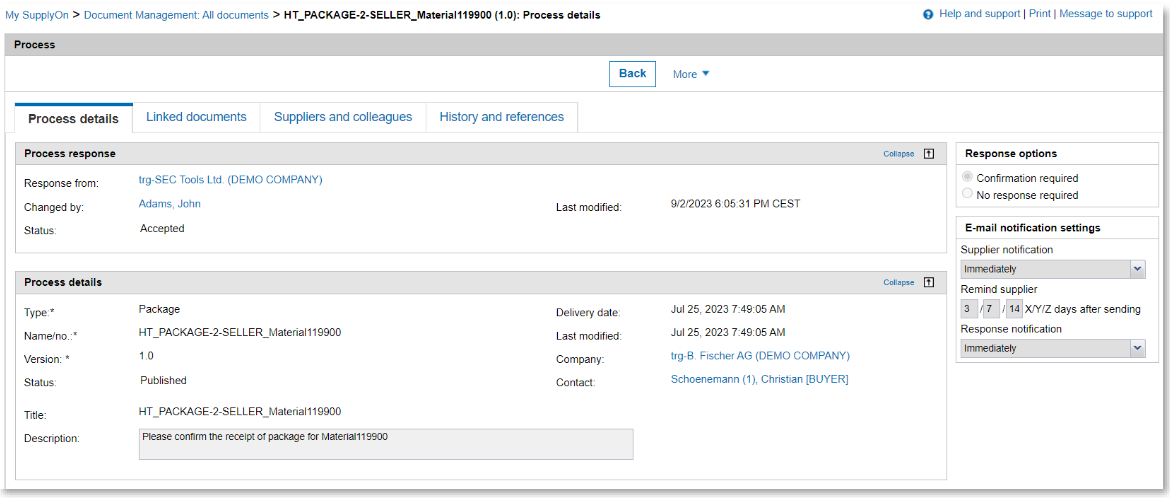

Figure 9 Document details.

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).

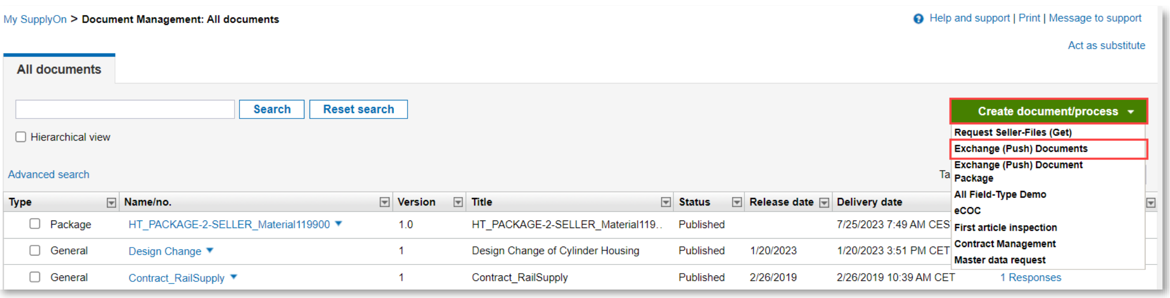

Figure 10 Create document/process button.

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 *.

3. 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.

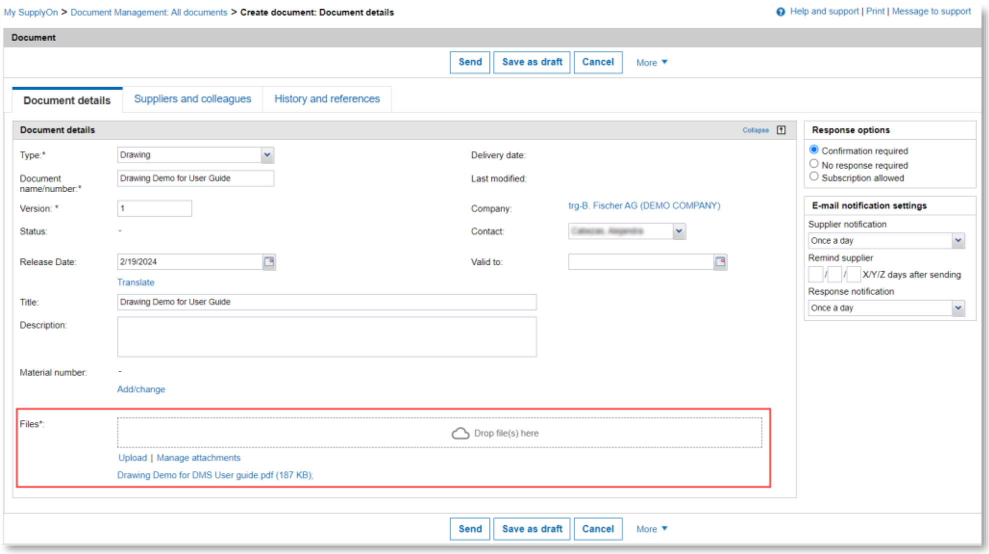

Figure 11 Create document: Document details.

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

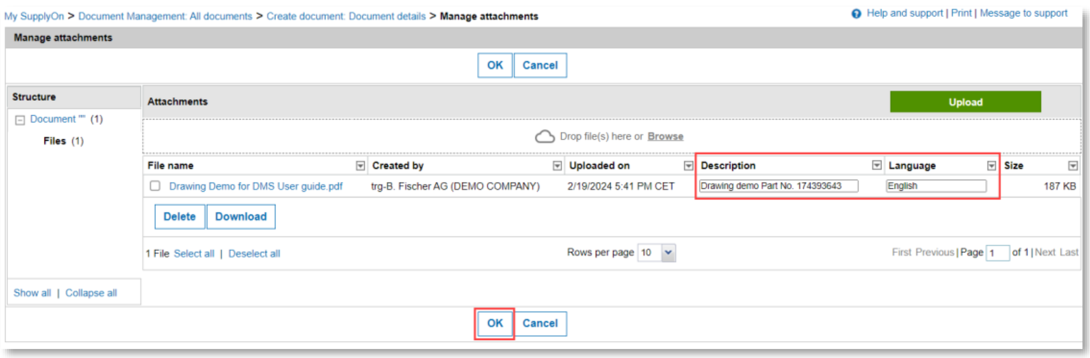

Figure 12 Manage attachments.

5. 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.

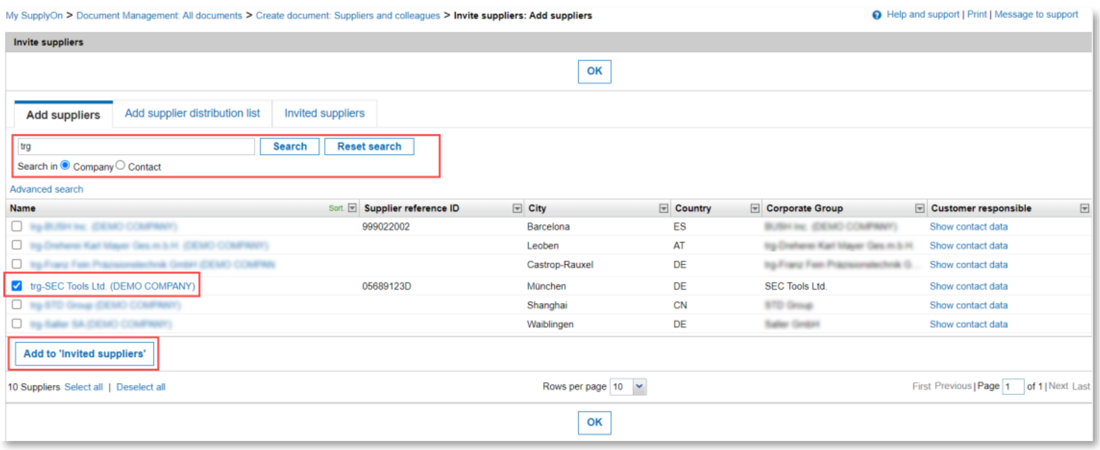

Figure 13 Invite suppliers: Add suppliers overview.

6. 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.

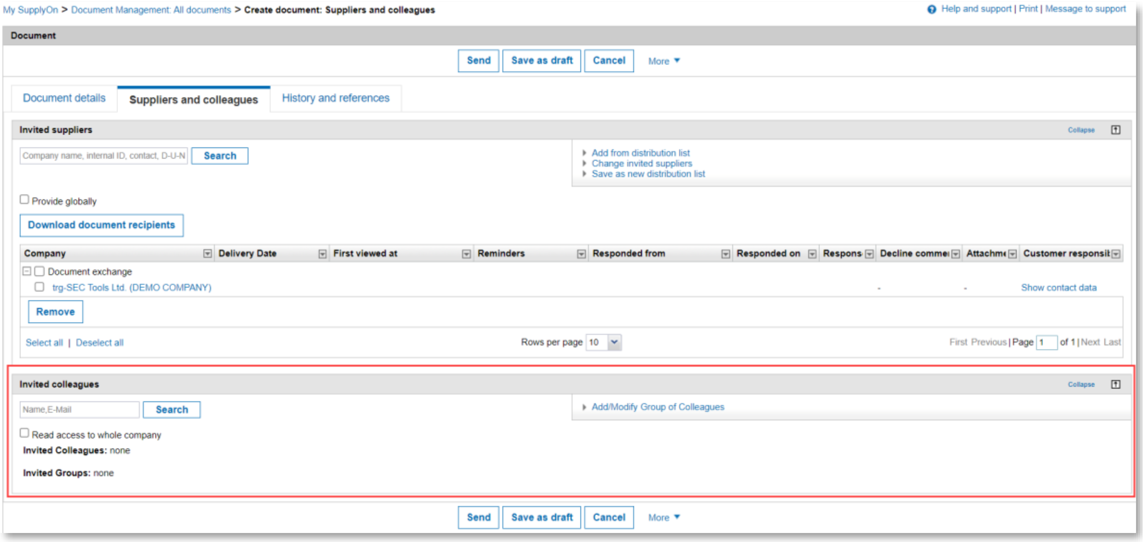

Figure 14 Suppliers and colleagues tab overview.

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

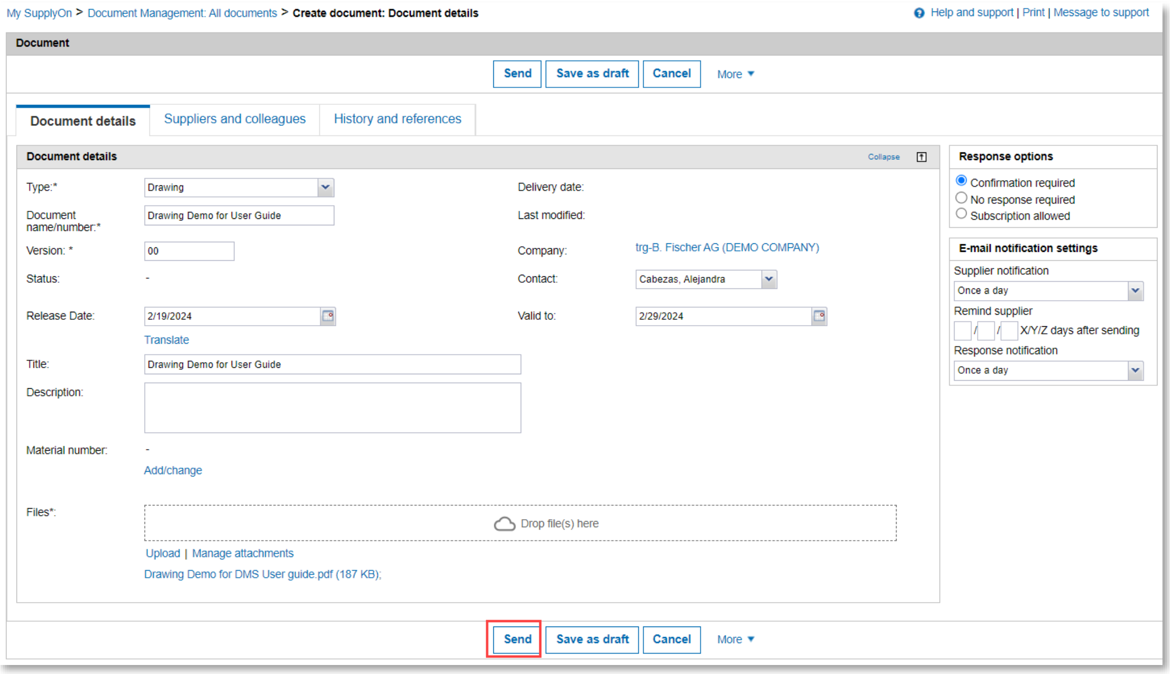

Figure 15 Send button.

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.

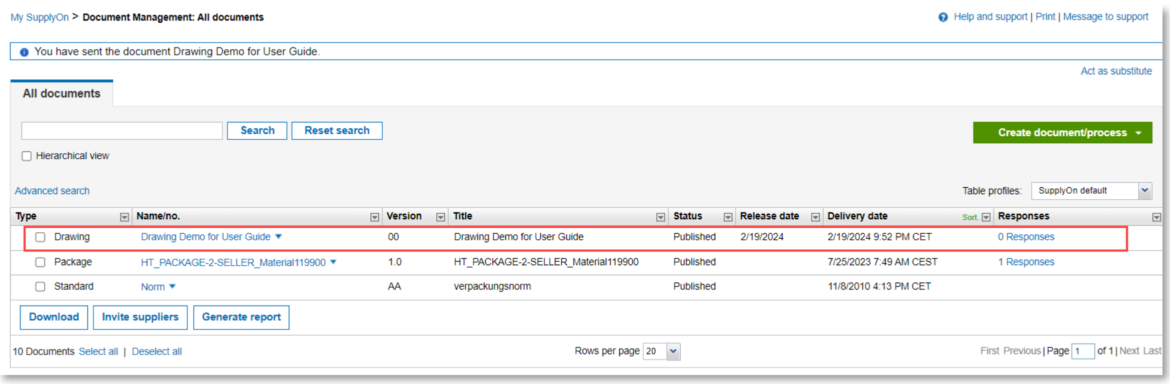

Figure 16 Sent document.

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).

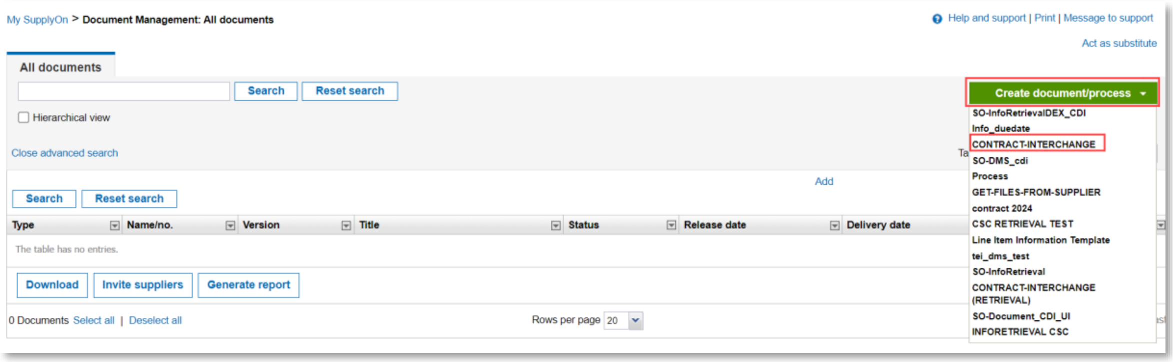

Figure 17 Create document/process button.

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.

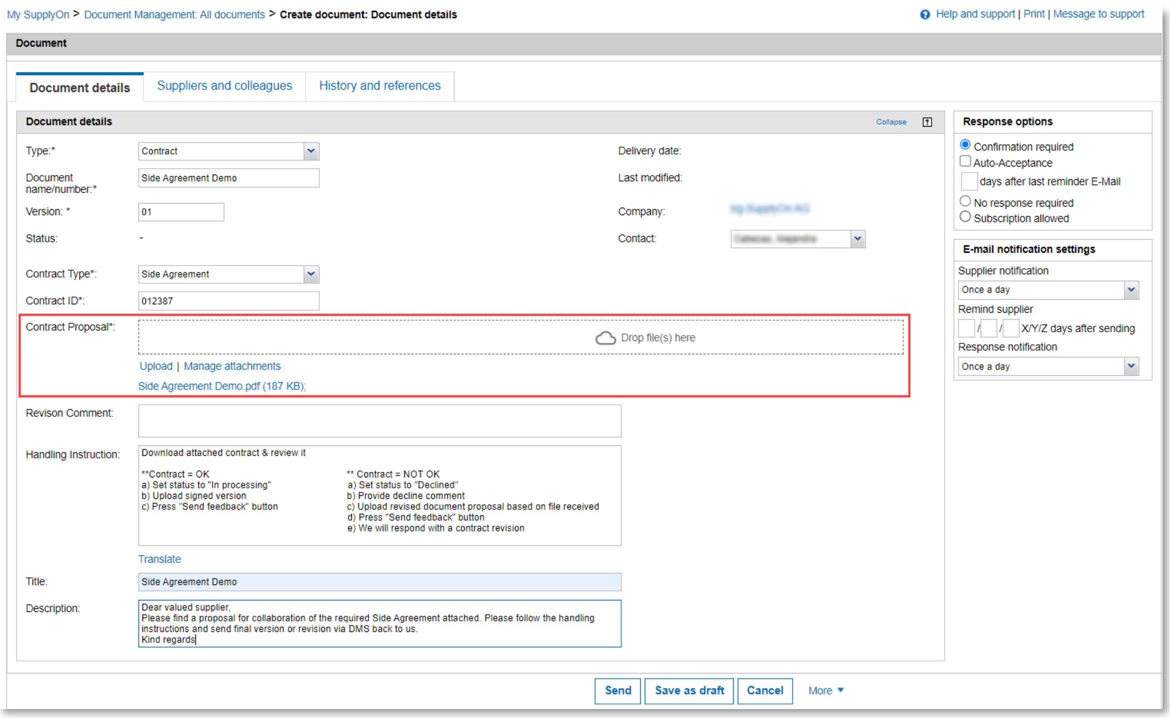

Figure 18 Create document: Document details.

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.

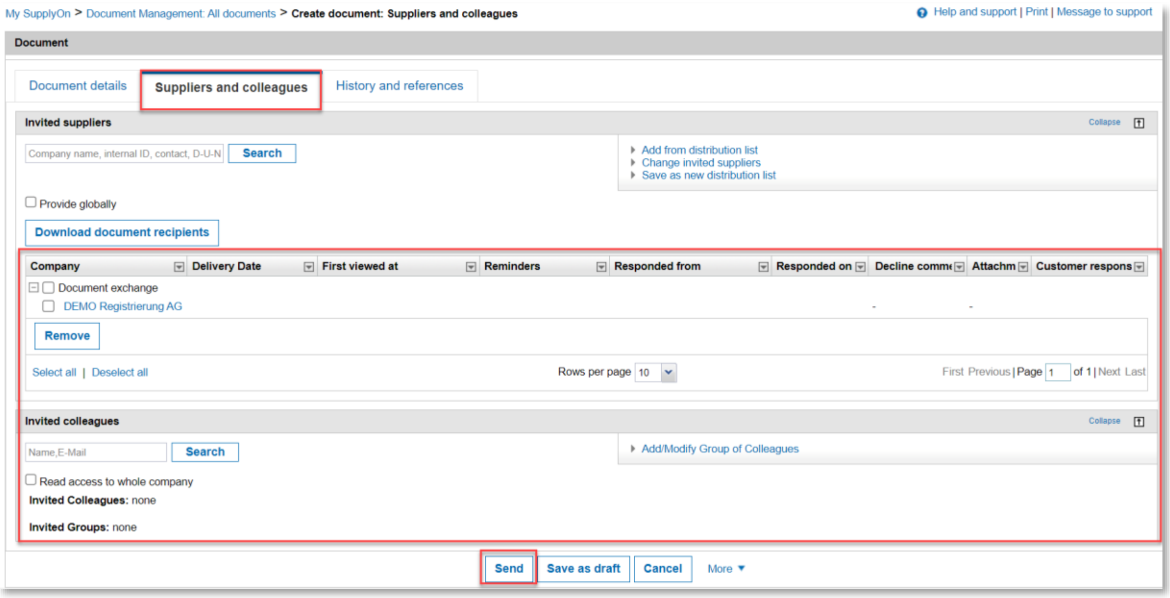

Figure 19 Suppliers and colleagues tab.

5. 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.

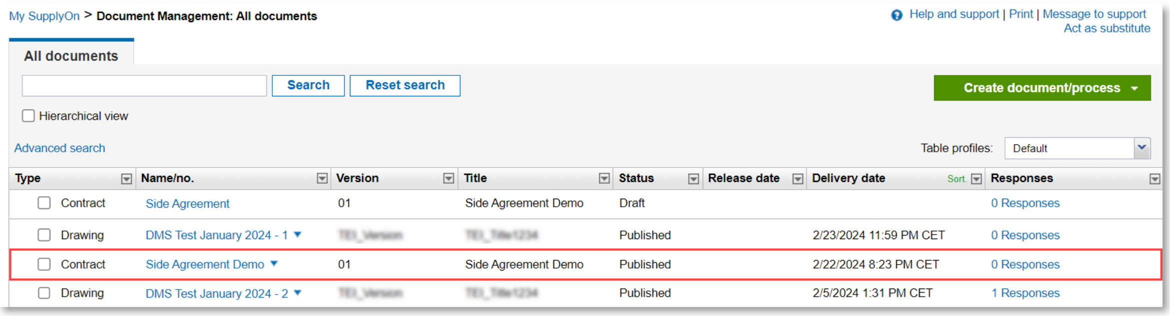

Figure 20 Sent document.

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:

6. 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.**

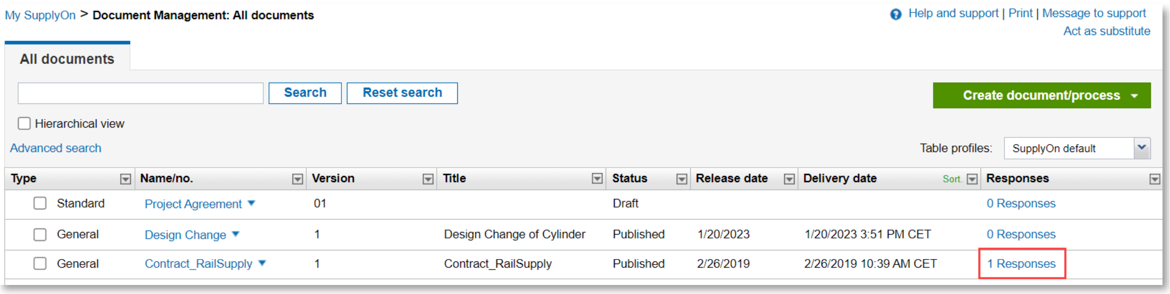

Figure 21 Document Management Overview: Responses column.

7. 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.

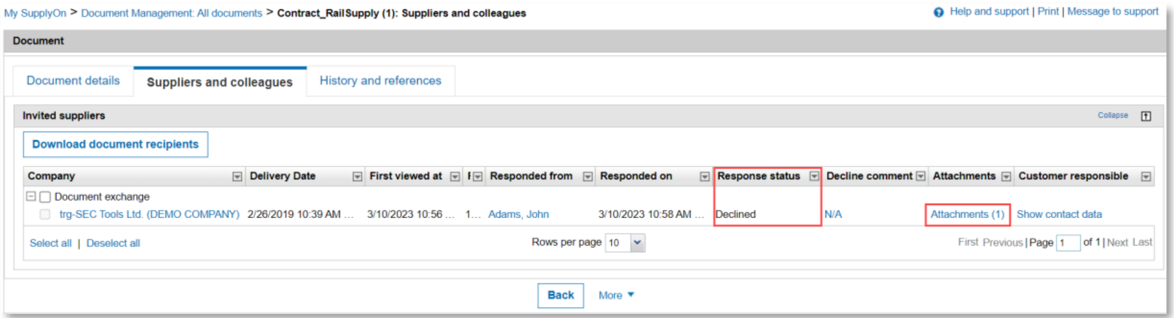

Figure 22 Suppliers response details.

8. 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.

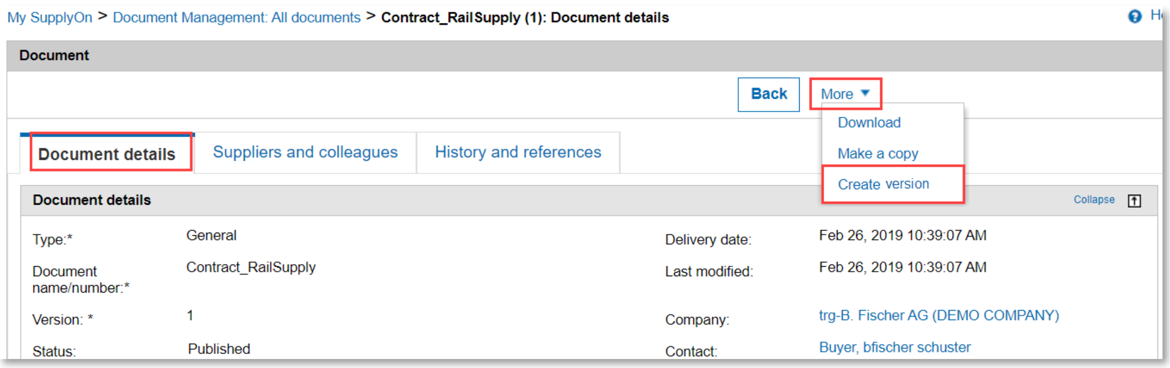

Figure 23 Create new version of the document.

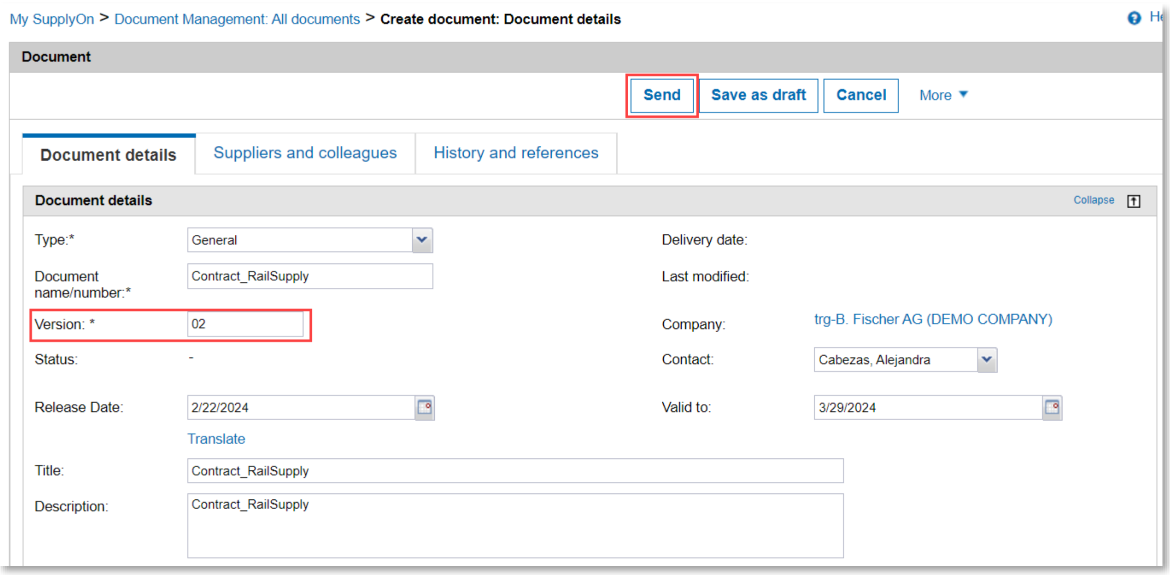

Figure 24 New version of the document**.**

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"**.

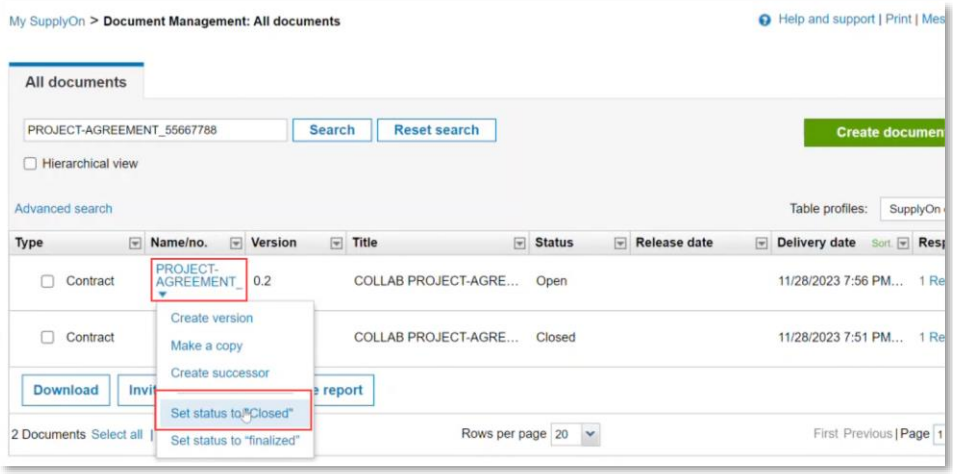

Figure 25 Setting document status to "Closed".

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 attachements.
- 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).

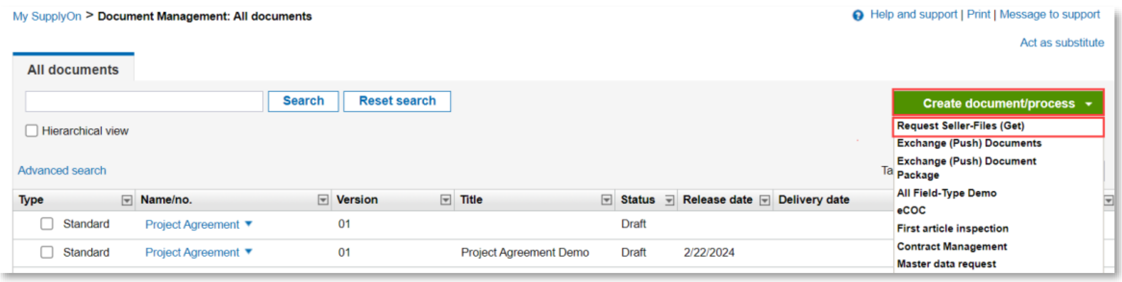

Figure 26 Create document/process button.

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 *.

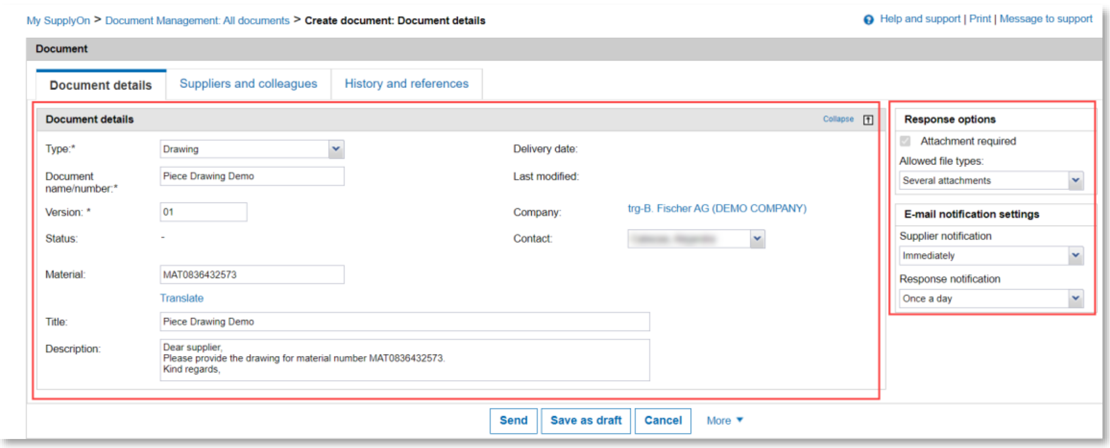

Figure 27 Create document: Document details.

3. 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.

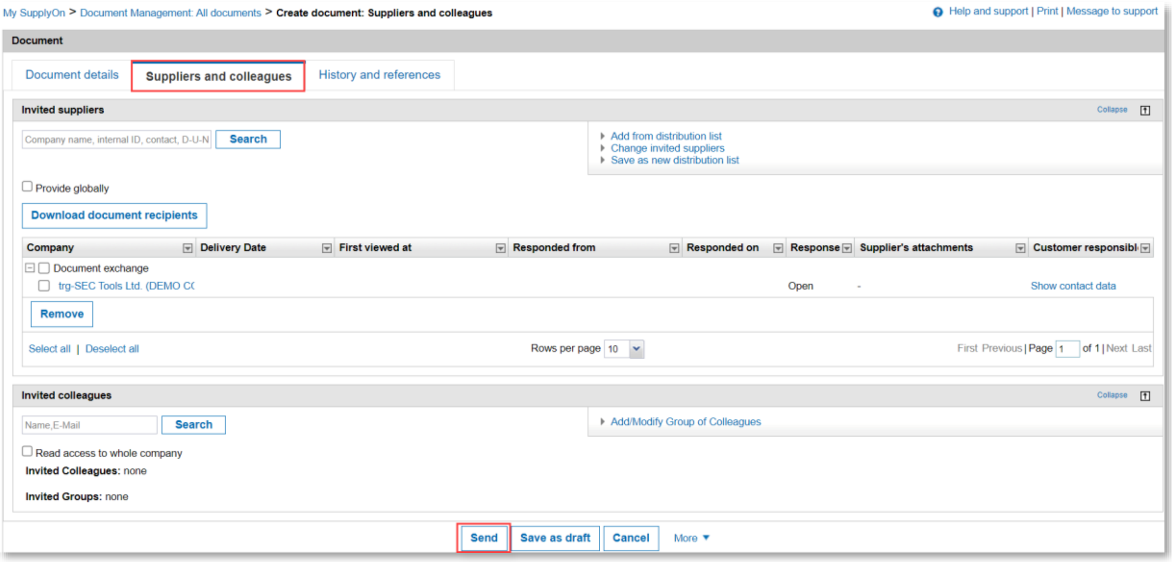

Figure 28 Suppliers and colleagues tab.

4. 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.

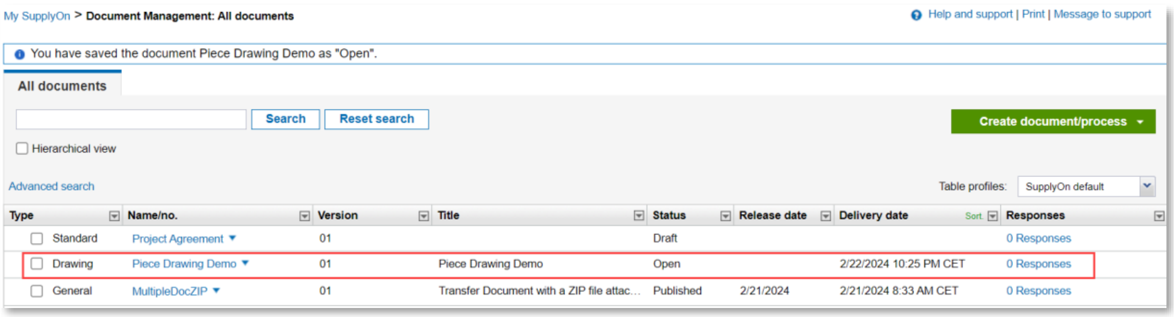

Figure 29 Sent document.

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