

SupplyOn Sourcing

关键用户培训

Your Supply Chain

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

HITACHI Astemo – SupplyOn Sourcing

采购平台关键用户培训

数字化转型，交付无忧。



目标网格 - SupplyOn Sourcing 关键用户培训

目的

为何要进行这项培训？这是为了...

- › 熟悉 SupplyOn Sourcing 平台
- › 使关键用户能够创建、发送并管理询价 (RfQ)
- › 让关键用户能够进行日常操作
- › 赋予您培训其他 SRC 用户的技能

日立安斯泰莫/利益相关方

培训对象与涉及人员都有谁？

培训对象

- › 日立安斯泰莫 SRC 关键用户

涉及人员

- › 日立安斯泰莫采购部/SupplyOn 咨询服务部

目标网格

我们需要在这次培训中实现什么目标？

- › 解释常规应用逻辑（5-10 分钟）
- › 解释 SRC 项目和功能
- › 讨论 RFQ 结构和创建过程
- › 解释 SRC 功能
- › 回答开放性问题

最终成果

将以哪些标准来衡量培训成果？

- › 关键用户培训完成情况
- › 问题得到解答
- › 视频和演示材料与日立安斯泰莫共享

衡量标准

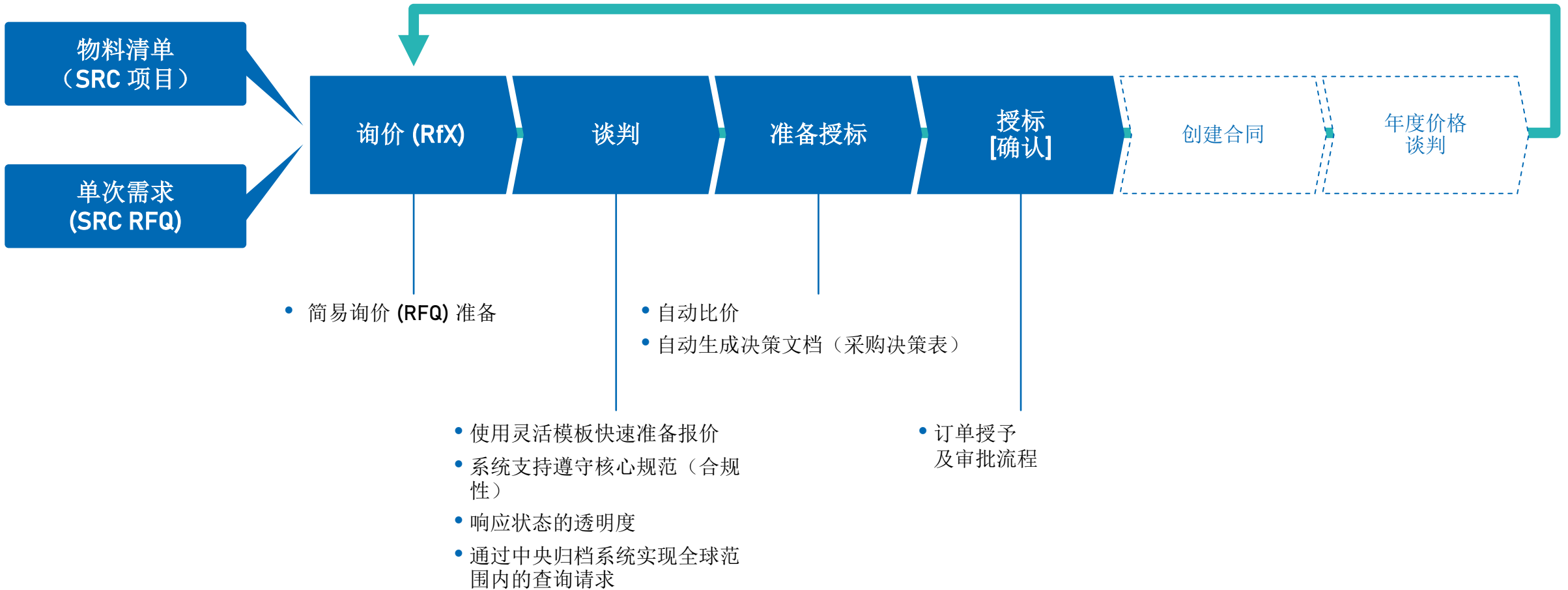
SupplyOn Sourcing (SRC) 关键用户培训 — 过程与逻辑

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SupplyOn Sourcing — 经典 RfX 流程

解决方案概念：从需求到合同的整套电子化流程

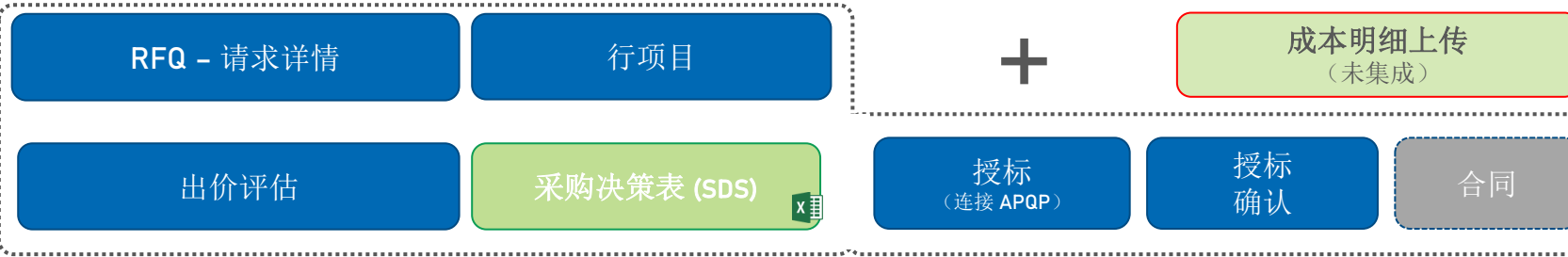


选项

SupplyOn Sourcing —— 日立安斯泰莫 Go-Live 模板概念

机械/电子零件 RfX 模板

RfQ 模板 A —— 简化版 RfQ 模板，适用于机械零件

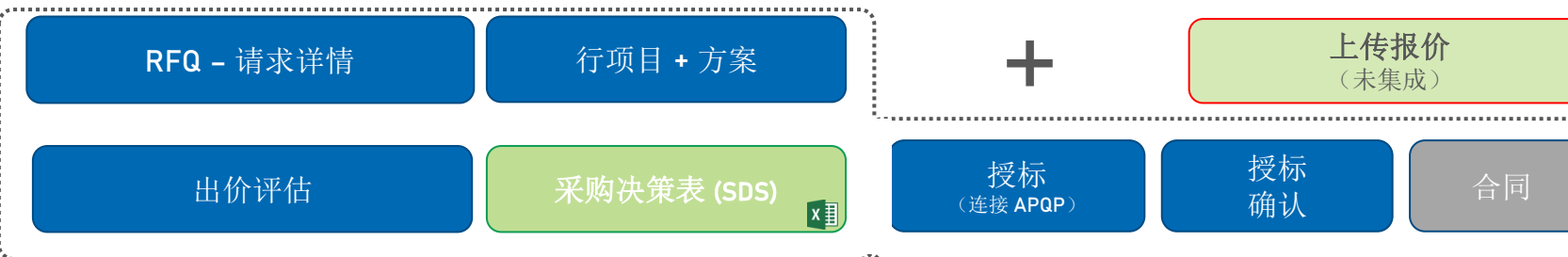


- 简化版模板 - 专注于提高供应商的使用体验
- 成本明细未集成

用例 1: 供应商必须提供请求详情和行项目信息

用例 2: 供应商必须提供请求详情和行项目信息 + 成本明细附件

RfQ 模板 B —— 简化版 RfQ 模板，适用于电子零件/半导体



- 简化版模板 - 专注于提高供应商的使用体验
- 行项目方案已激活

用例 1: 供应商必须提供请求详情和行项目方案

用例 2: 可能的其他上传报价的方式



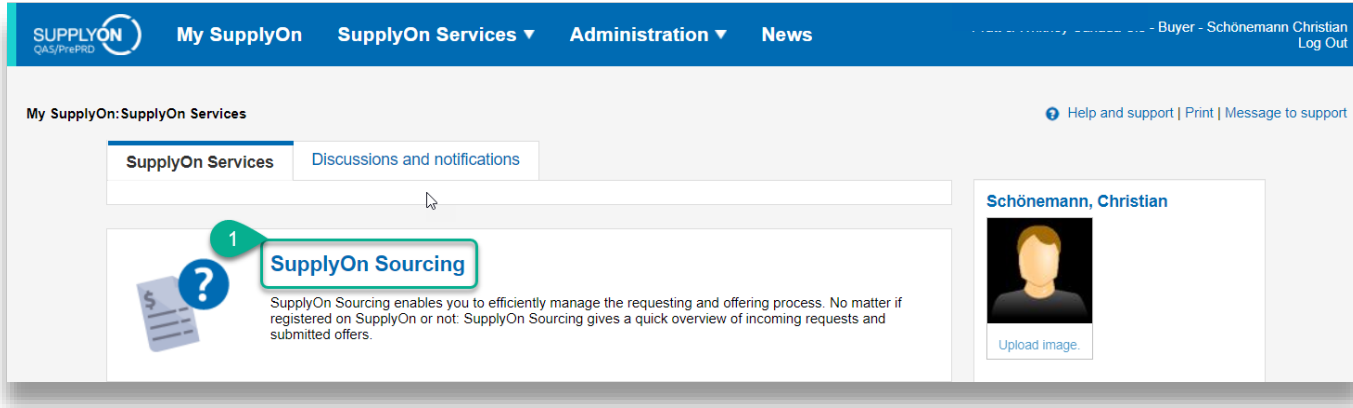
快速指南：“如何创建 RfX”

从准备到启用概述

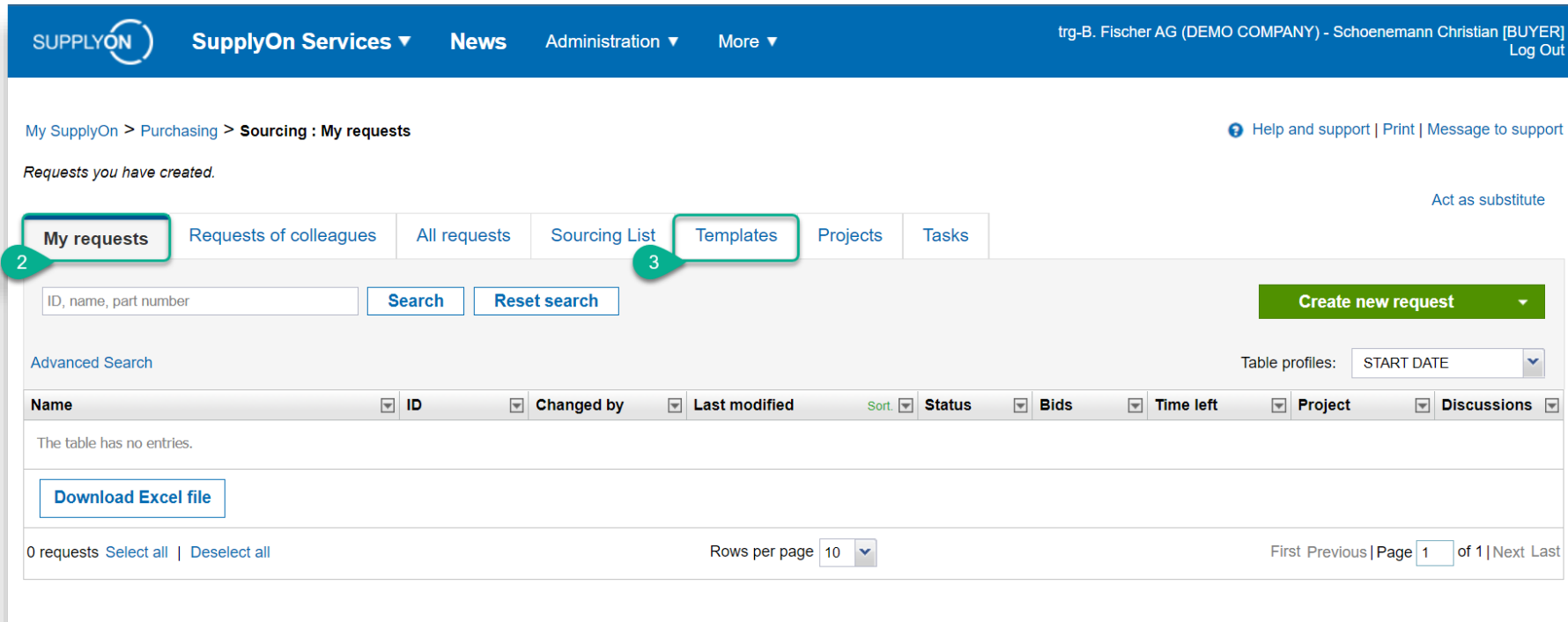
Your Supply Chain

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采购平台 – “快速指南”：准备和发送 RfQ – 1/9



1. 登录后访问
SupplyOn Sourcing
2. “my requests” 选项卡列出了您所有的询价 (RfQ) 记录
3. 点击 “Templates” 选项卡：这里列出了所有可用的 RfQ 模板，供您直接选择并开始编辑



还可以点击 “Create new request” 按钮，启动新的询价请求

<< 这就是您所看到的内容！

收件箱（RfQ 概览表）

- RfQ 及其版本
- 时间详情
- 状态

您可以在此调整 RfQ 的状态，

例如，“设置为已关闭”

采购平台 – “快速指南”：准备和发送 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

1 template Rows per page 10 Page 1 of 1

4.从表格中选择所需模板，并点击复选框以启用

5.点击“Create Request”

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打开“Request details”...

6. 填写内部信息字段
(填写之后供应商无法查看)

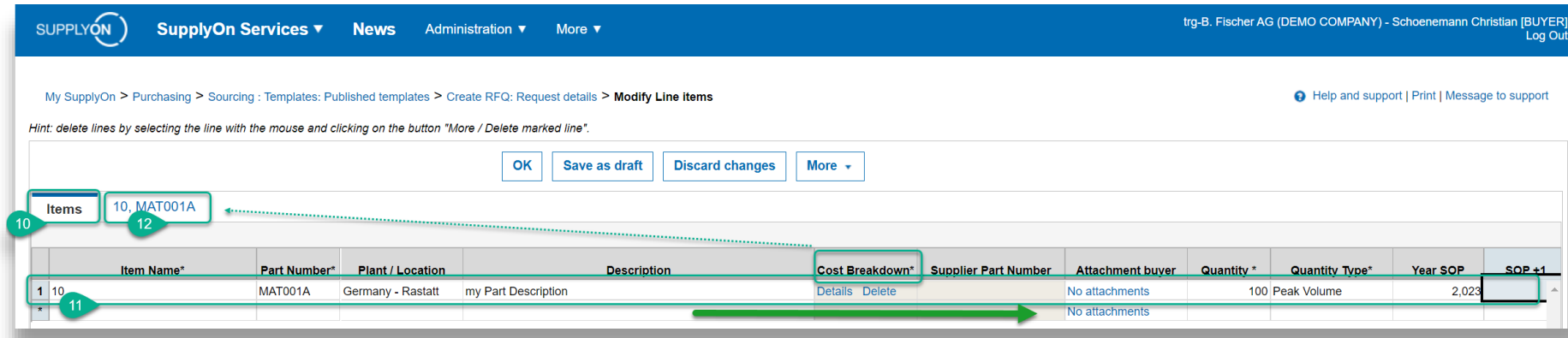
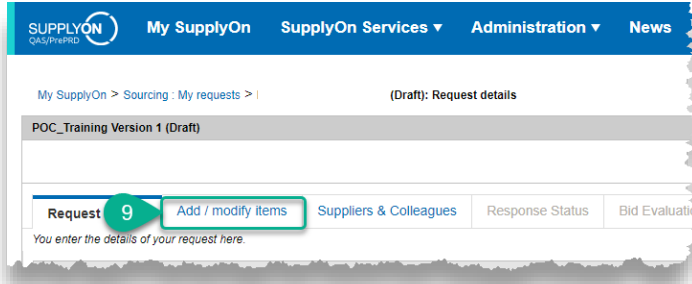
7. 填写共享信息
(与同事和供应商共享)

- A) 您也可以通过上传或拖放功能添加文档
- B) 标有“*”的字段为必填项
如果不填写，发送 RfX 时将会失败，需要对请求进行调整

8. 选择您偏好的选项以调整自动电子邮件逻辑

- “On incoming bids” = 买方会在供应商提交报价后收到一封电子邮件
- “Remind supplier ...” = 在 RfX 自动关闭前 X 天，供应商会收到提醒提交报价的通知
- “Send bid overview..” = 买方会收到一封电子邮件，其中包含一份汇总表格，显示所有供应商的报价状态

采购平台 – “快速指南”：准备和发送 RfQ – 4/9



09. 点击“Add / Modify Items”选项卡，打开行项目部分

10. 转至“Items”

11. 填写所有与部件相关的信息

- 您只能填写买方字段
 - 白色 = 公开并与同事及供应商共享
 - 黄色 = 内部信息，不与供应商共享
 - 灰色 = 供应商字段，只能由卖方登录并填写

12. 进入 CBS 选项卡

- CBS = 成本明细表
- 该选项卡显示输入到项目名称字段的名称（此处为：10）

采购平台 – “快速指南”：准备和发送 RfQ – 5/9

Items: 10, MAT001A

Request End Date: 8/31/2022

Item Name (Part Number): 10

SOP

Quantity: 100

Quantity Type: Peak Volume

Project demand over life-time: 2,023

Supplier Incoterms

Supplier Production Location

Description: my Part Description

Lead Time Serial Parts (weeks)

Bid Currency: EUR

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								
			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]	Total Price excl. Scrap [per Price Unit]	Scrap Rate
							EUR	0.000		0.000	
							EUR	0.000		0.000	
							EUR	0.000		0.000	

OK Save as draft Discard changes More

连接的 CBS 如图所示...

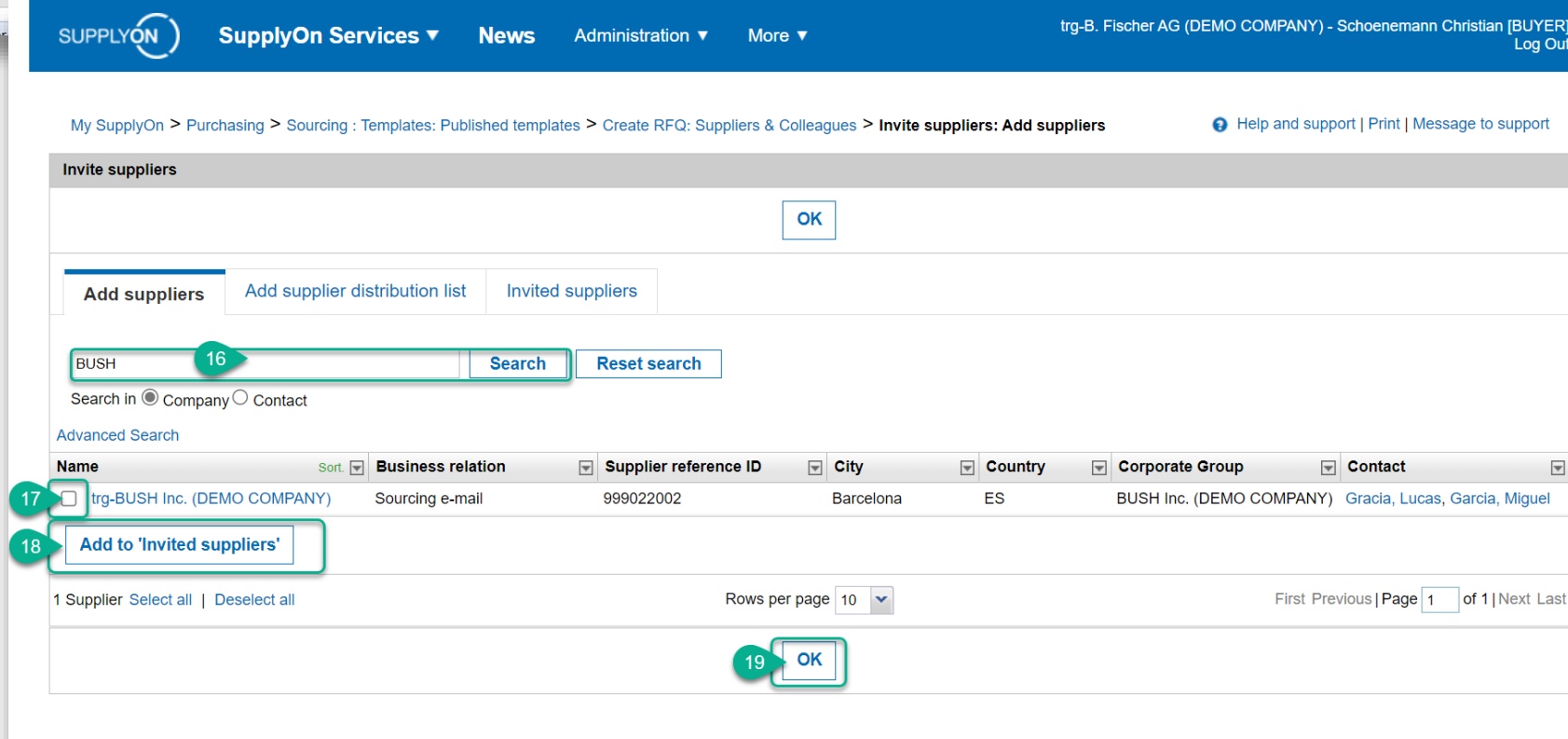
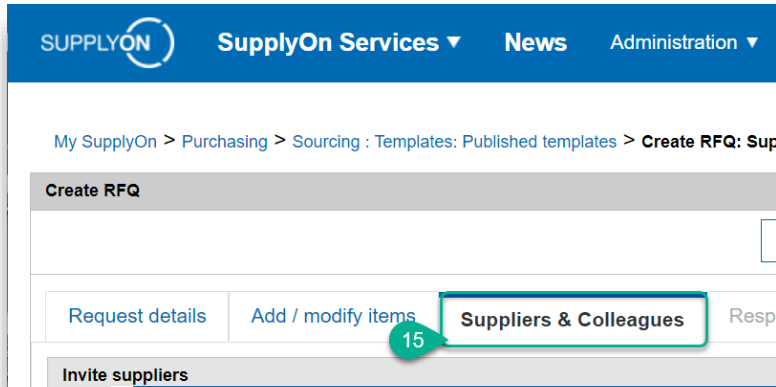
13.检查和/或填写买方字段（如绿色字段所示）（如适用）

- （例如）绿色 = 公开并与同事及供应商共享。
供应商不能进行调整
- （例如）黄色 = 供应商字段

14.点击“OK”返回“Request details”

* 由 CBS 的定义决定

采购平台 – “快速指南”：准备和发送 RfQ – 6/9



接下来，您可以邀请...

- 已注册的供应商
- 未注册的供应商
- 同事

15.进入“Supplier & Colleagues”选项卡

16.使用供应商公司名称进行搜索。（支持使用星号(*)作为通配符）并点击“Search”

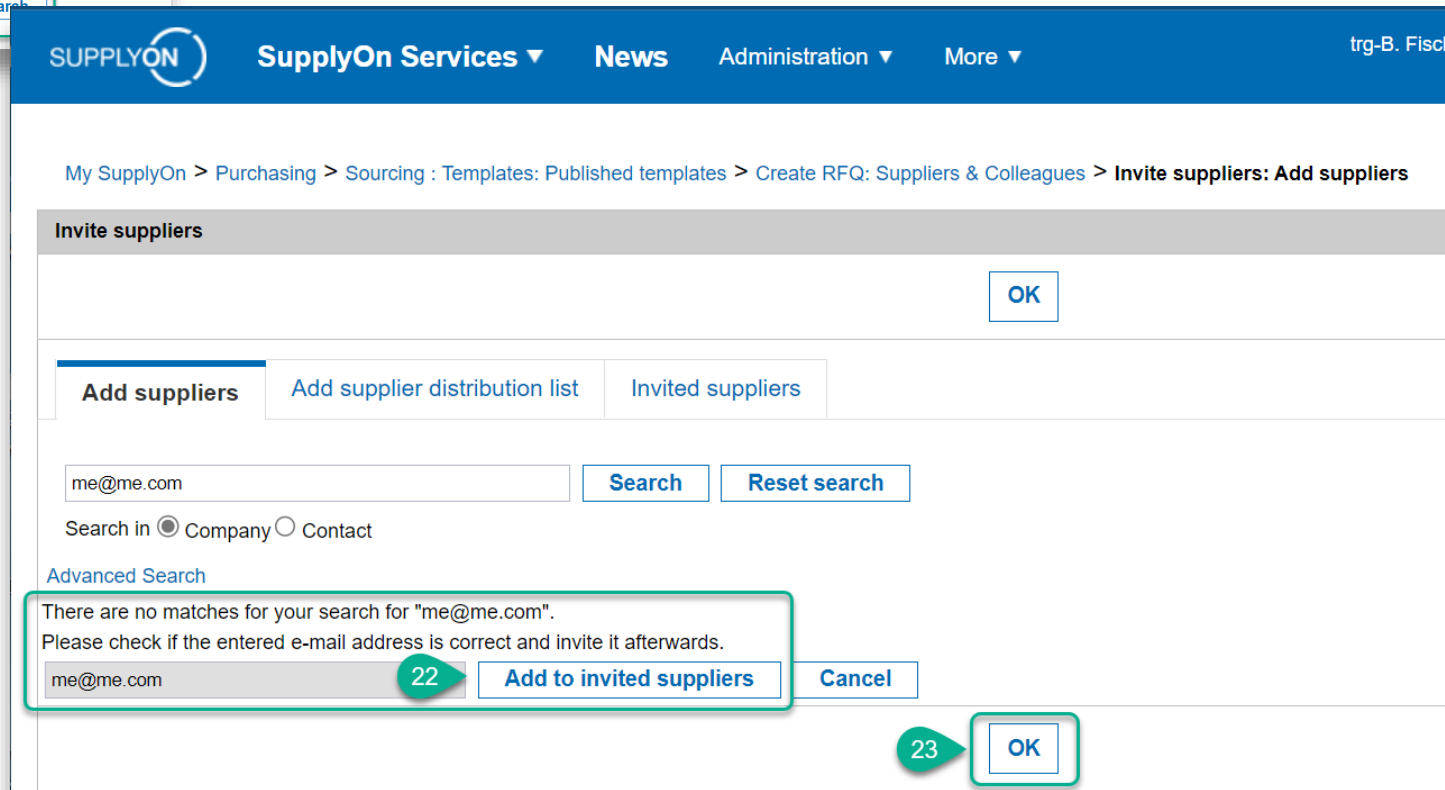
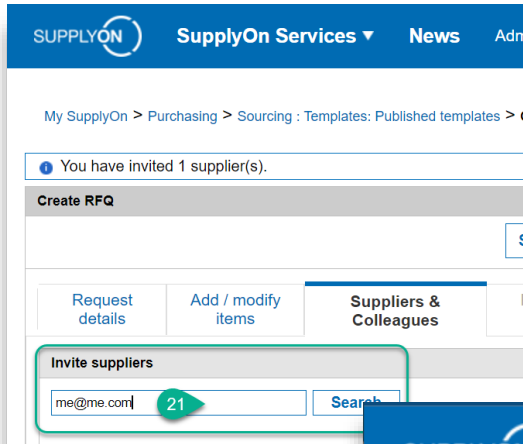
17.显示检测到的供应商列表。通过设置标记选择相关供应商。

18.点击“Add to ,invited suppliers`”

19.然后再点击“OK”

备注：请仅使用为公司提供的测试供应商

采购平台 – “快速指南”：准备和发送 RfQ – 7/9



也可将 **未注册的** 供应商添加到 RfQ 中。请返回搜索字段...

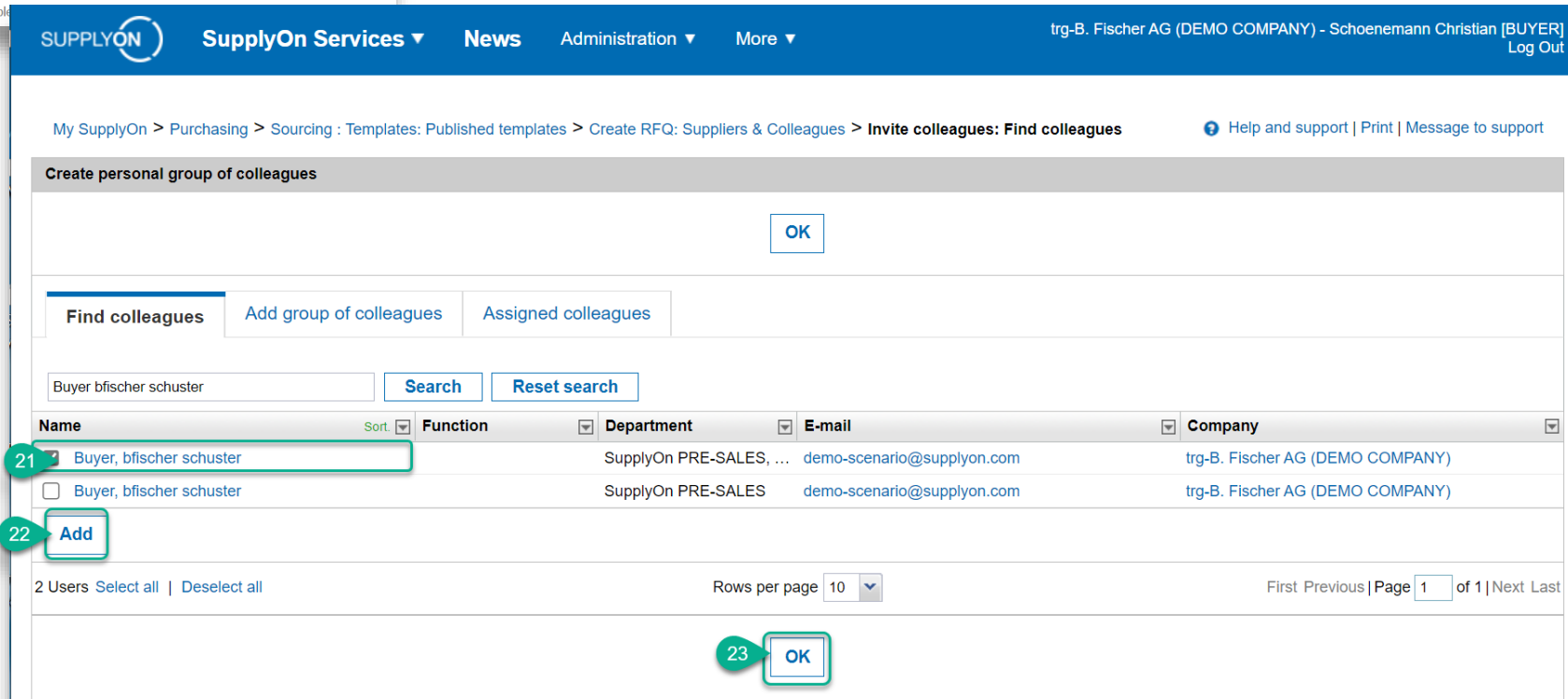
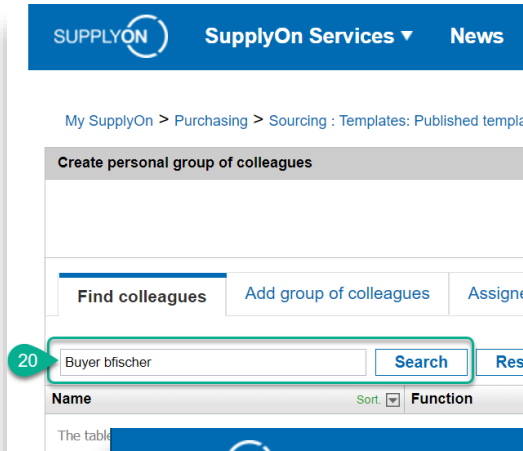
21. 输入经过验证的电子邮件地址（例如 me@me.com）并点击“Search”

如果联系人是新加入平台的，界面中会新增一行。

22./23. 确认“Add to Invited Suppliers”，再点击“OK”

备注：测试时，您可以使用您自己的公司电子邮件地址来模拟供应商。

采购平台 – “快速指南”：准备和发送 RfQ – 8/9



此外，可能还需邀请同事。受邀人员可以访问 RfQ（读取或编写）

20.通过输入（用户）名称进行搜索。（支持使用星号(*)作为通配符）并点击“Search”

21.显示检测到的同事列表。通过设置标记选择相关供应商...

22.点击“Add”...

23....和“OK”

接下来，返回到“Suppliers & Colleagues”屏幕。

采购平台 – “快速指南”：准备和发送 RfQ – 9/9

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: Suppliers & Colleagues Help and support | Print | Message to support

Create RFQ

A **B** **C** [Send request](#) [Save as draft](#) [Back](#) More ▾

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

Invite suppliers

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

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)

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

E-Mail Notifications

- On incoming bids
- Remind supplier 3 days before end date
- Send bid overview to buyer 1 days before end date

24 [Send request](#) [Save as draft](#) [Back](#) More ▾

结果:

RfQ 已准备就绪...

- A) 已经填写标题信息
- B) 已经填写产品细节
- C) 已添加相关方
 - 已注册的供应商
 - 未注册的供应商
 - 同事

25. 点击 “Send request”

快速指南 —— “如何上传项目信息”

上传项目的步骤说明

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采购平台 – “快速指南”：上传项目 – 1/4

Projects

1. Download 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

第1步:

- 访问 SRC 项目区域
- 下载项目模板

采购平台 – “快速指南”：上传项目 – 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	Annual	Annual
									Component Volume SOP	Component Volume SOP + 1	Component Volume SOP + 2
1											
2											
3											
4											
5											
6											
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第2步:

- 打开项目模板
- 提供项目信息并保存

采购平台 – “快速指南”：上传项目 – 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

第3步:

- 点击“Upload Project”
- 将项目模板添加为xlsx文件

Project upload

Please select a file for the upload.

+ Add...

Cancel

采购平台 – “快速指南”：上传项目 – 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

第4步:

- 检查项目信息



? Any Questions

SupplyOn AG

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