

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

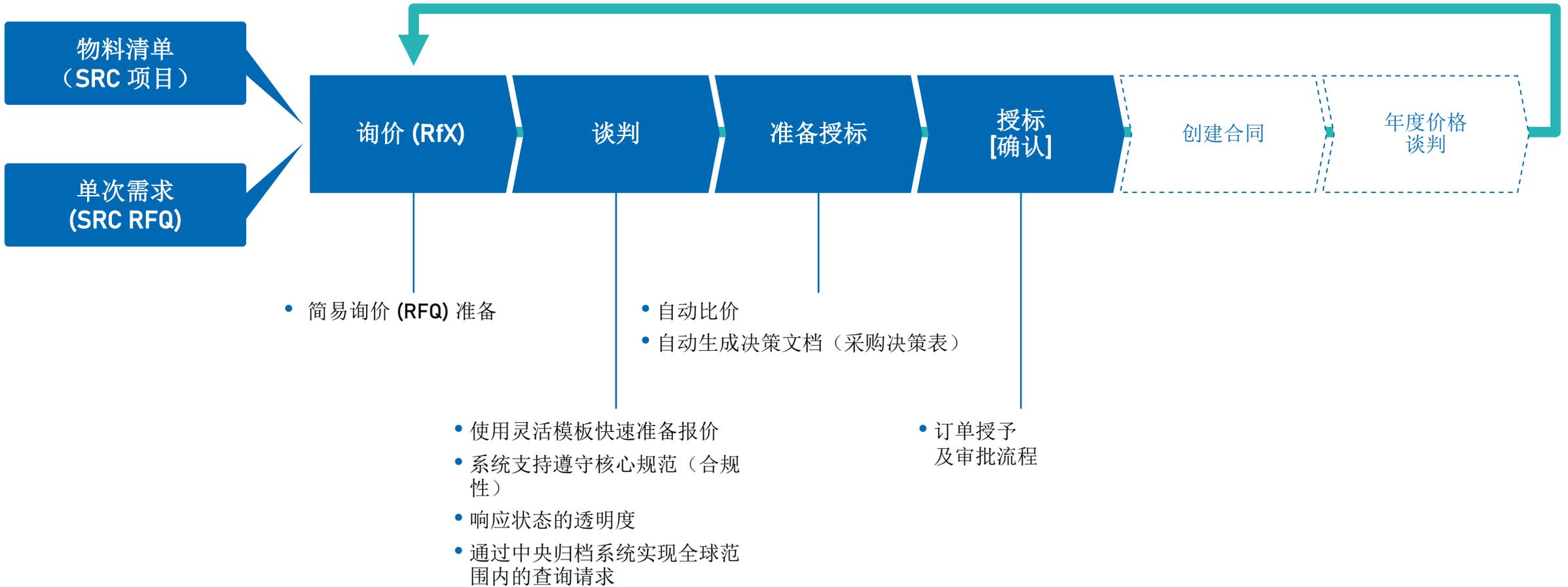
SupplyOn Sourcing (SRC) 关键用户培训 — 过程与逻辑

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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

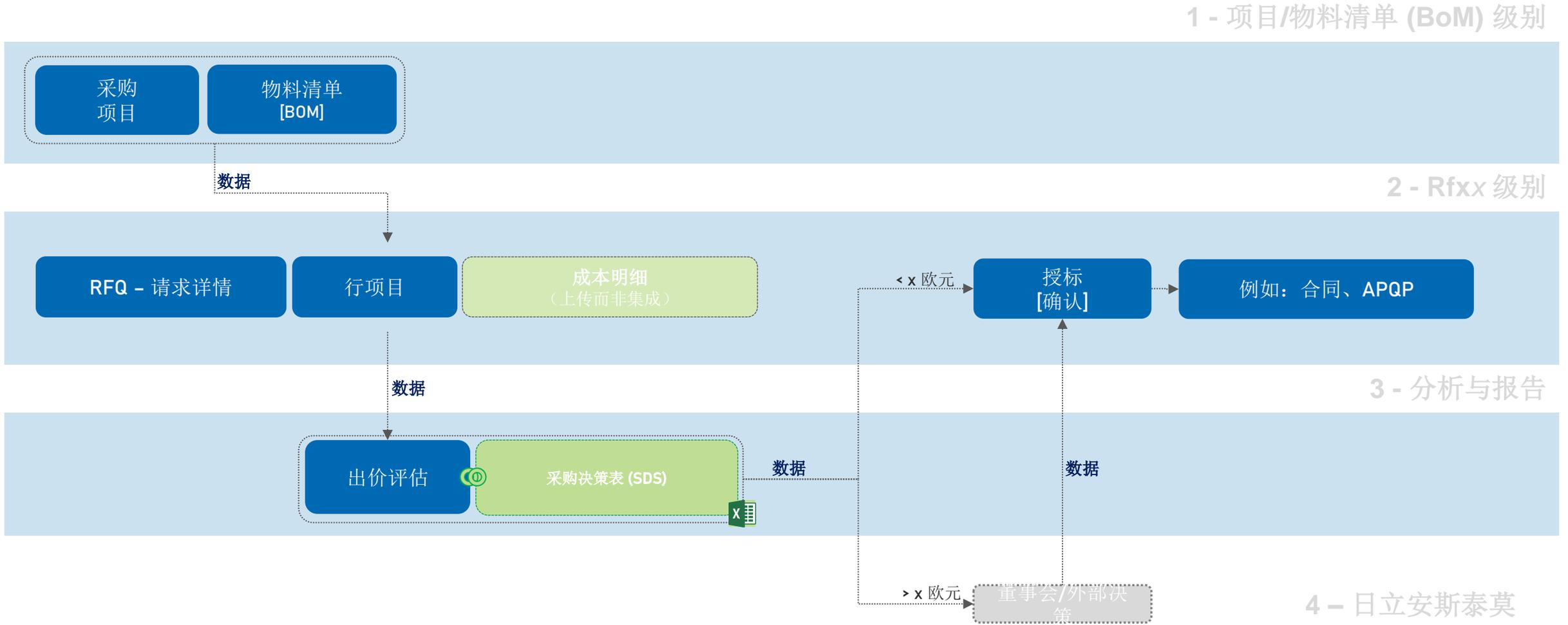


选项

SupplyOn Sourcing

采购 Rfx 模板 —— 基本架构与内容流程（数据）

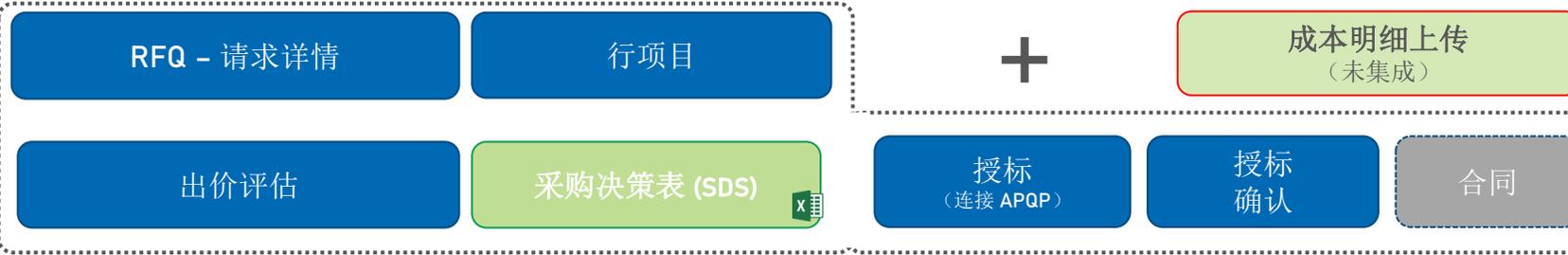
SupplyOn 采购解决方案 —— 从项目到合同的 RfQ 流程



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

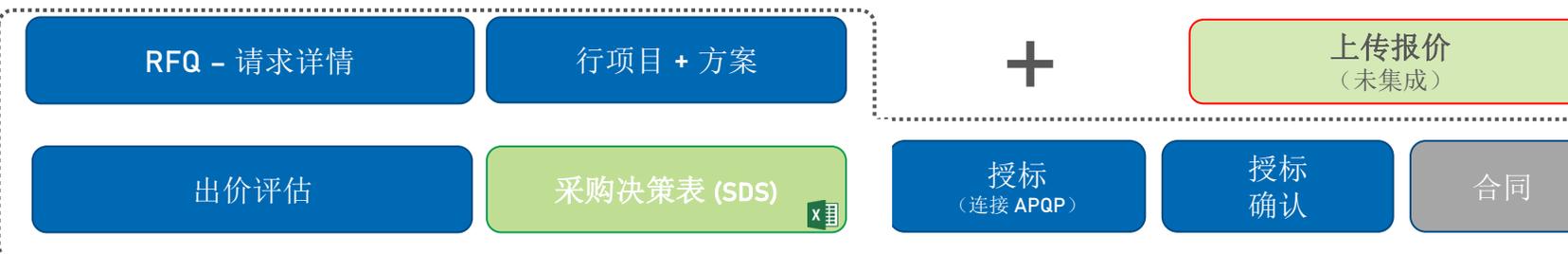


- 简化版模板 - 专注于提高供应商的使用体验
- 成本明细未集成

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



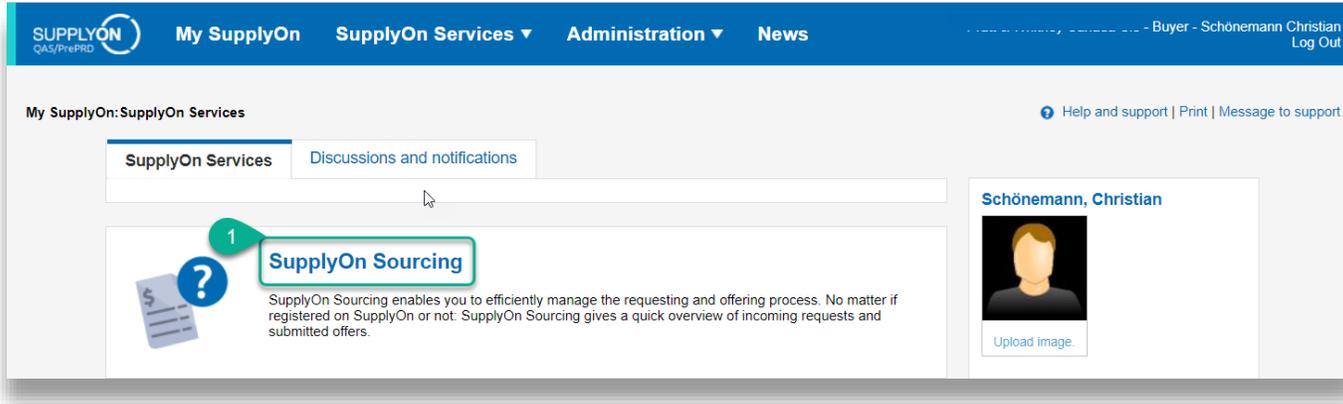
快速指南：“如何创建 RfX”

从准备到启用概述

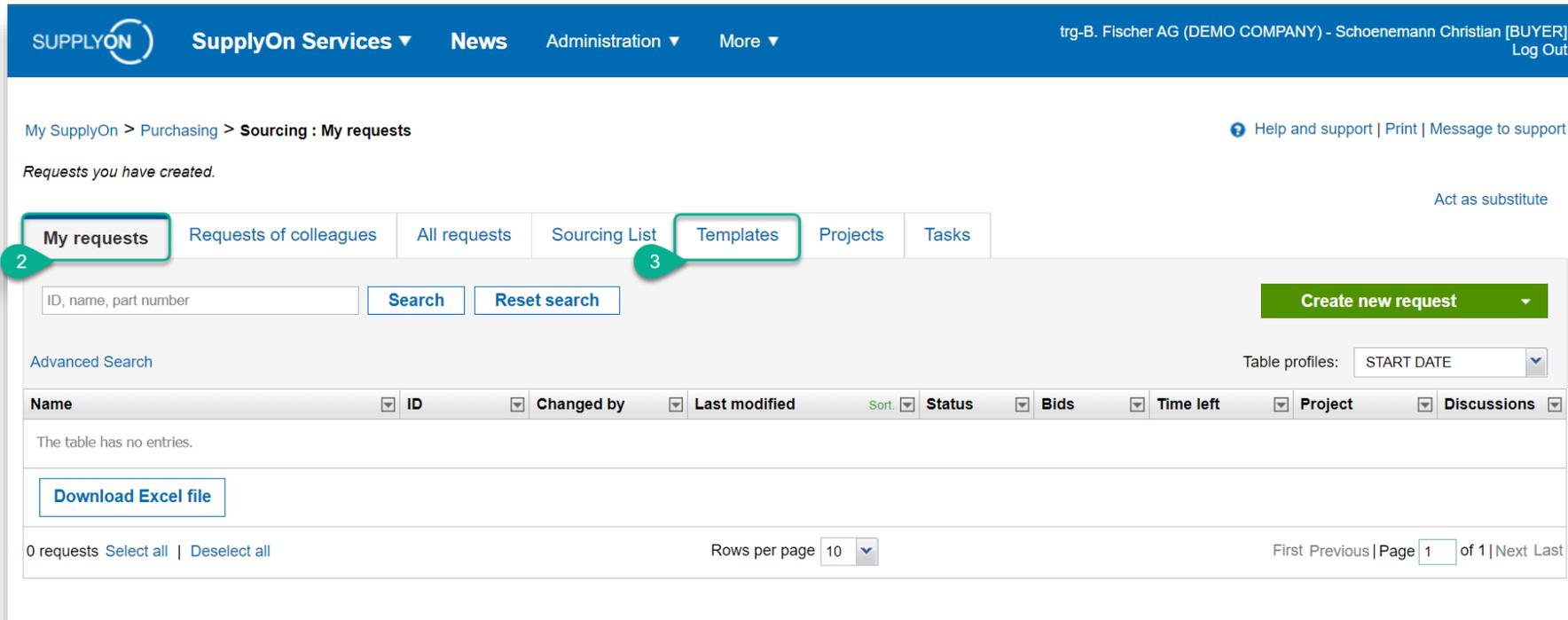
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采购平台 – “快速指南”：准备和发送 RfQ – 1/9



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”

采购平台 – “快速指南”：准备和发送 RfQ – 3/9

打开“Request details”...

6. 填写内部信息字段
(填写之后供应商无法查看)

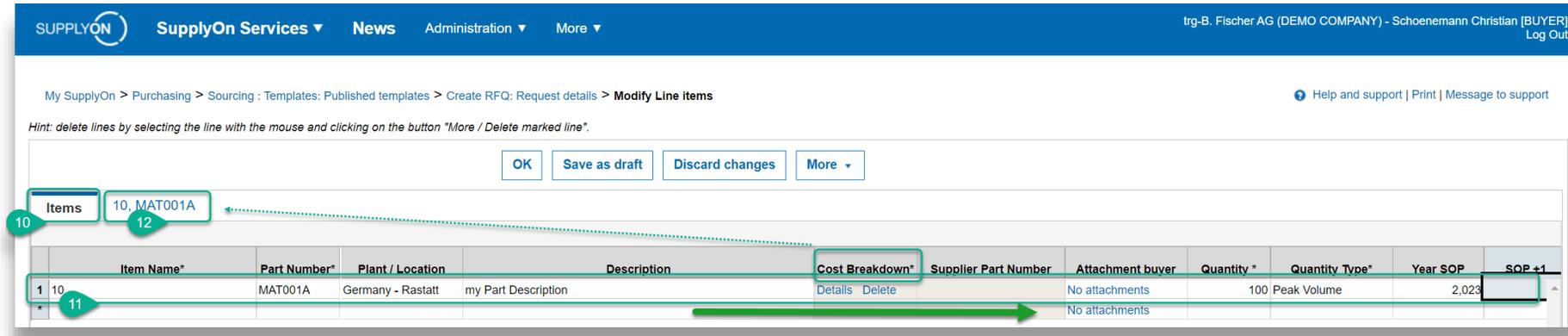
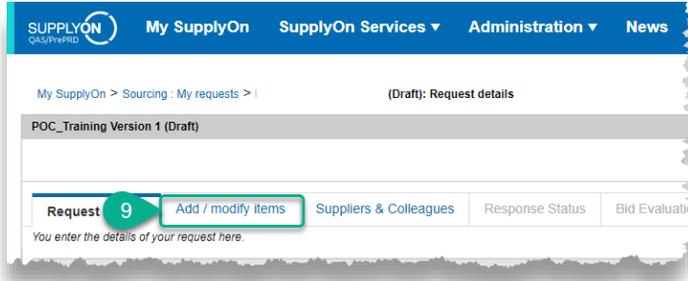
7. 填写共享信息
(与同事和供应商共享)

- 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

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

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

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".

Items: 10, MAT001A

OK Save as draft Discard changes More -

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								
			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...

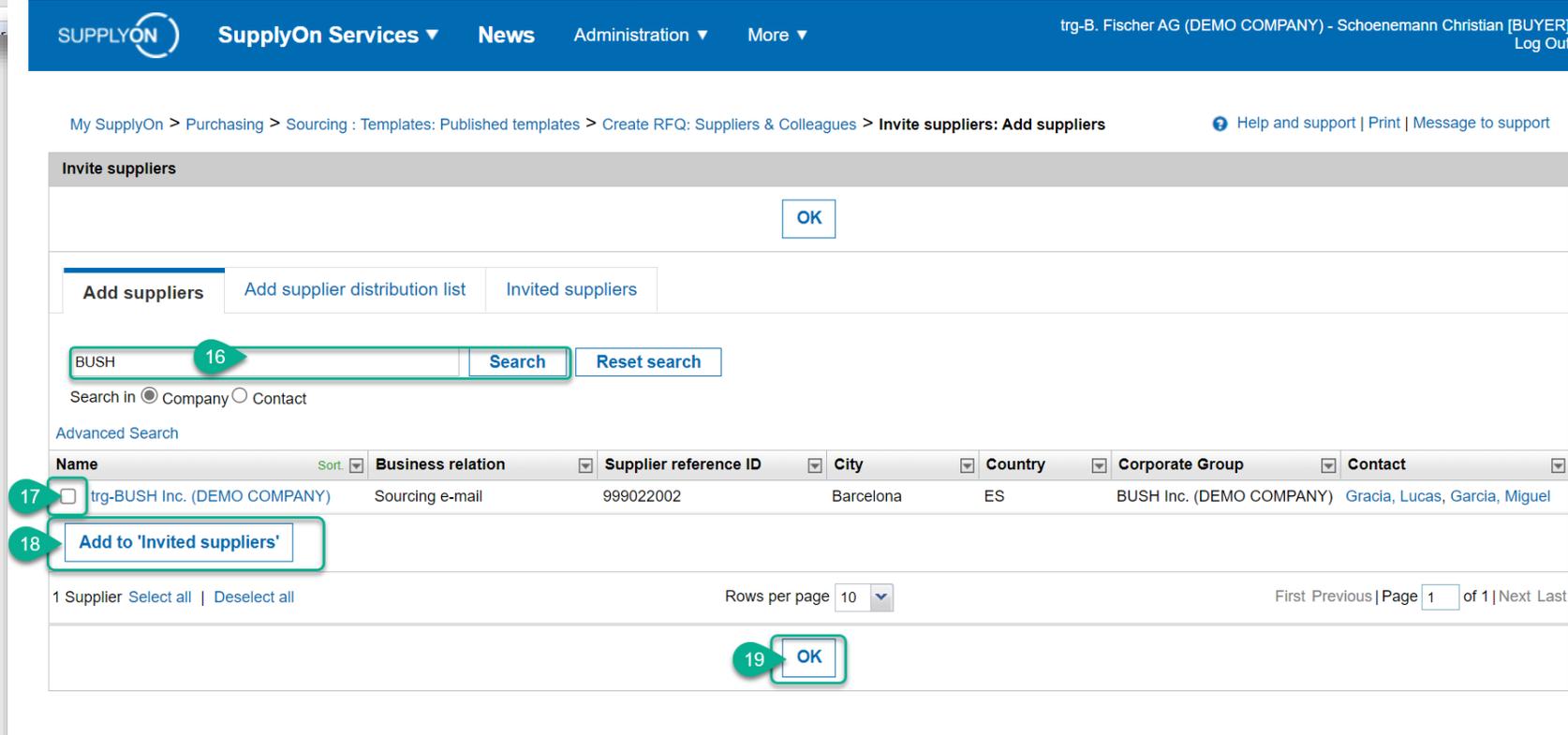
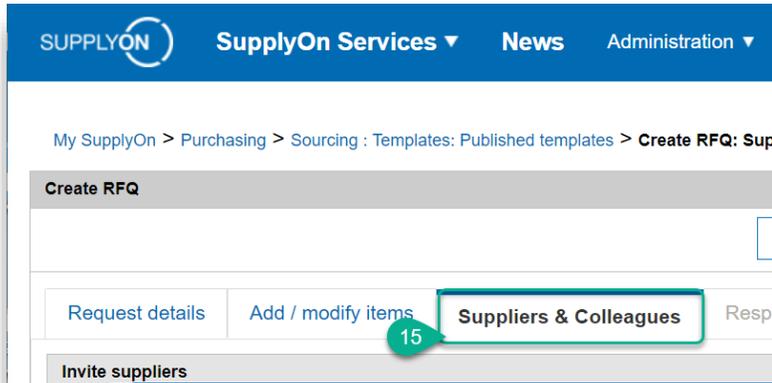
13.检查 and/或填写买方字段（如绿色字段所示）（如适用）

- （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”

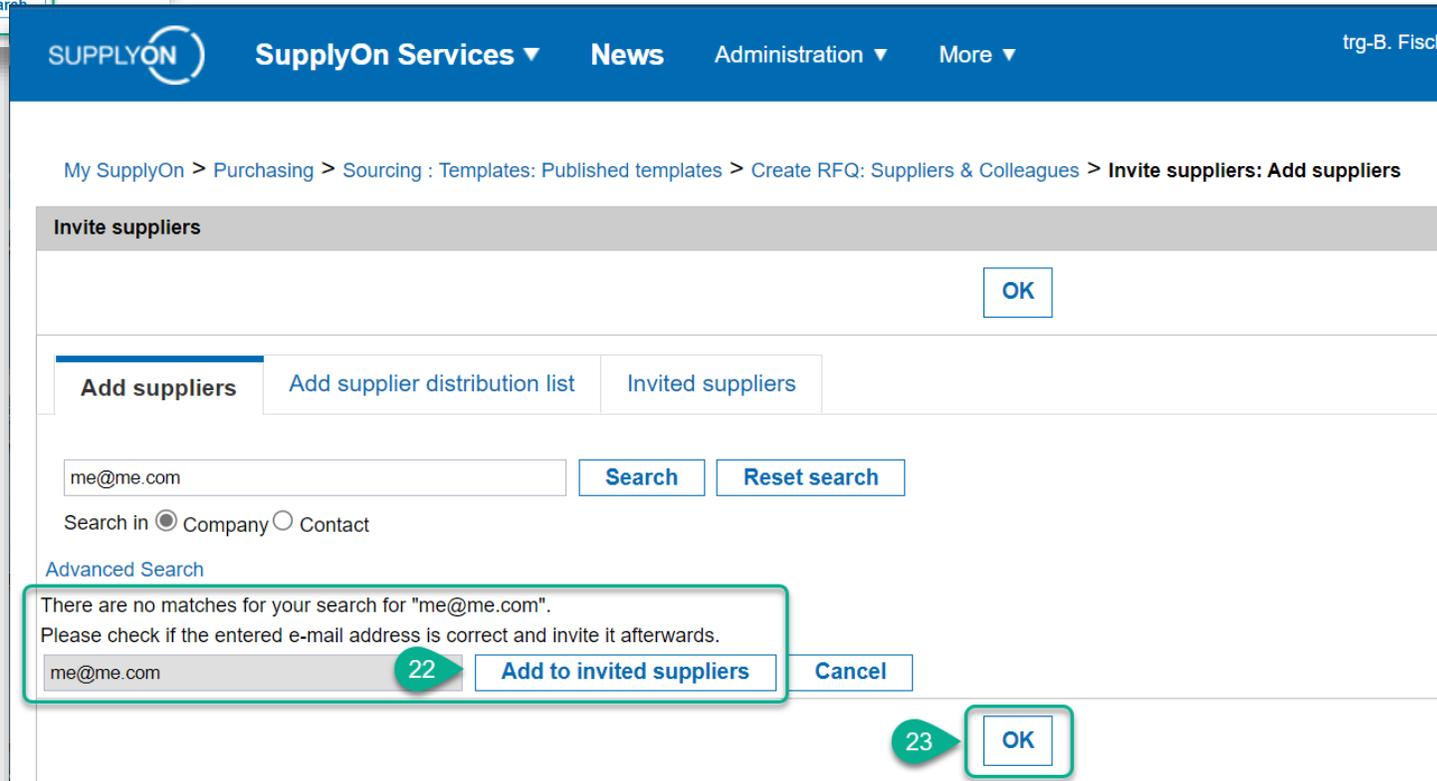
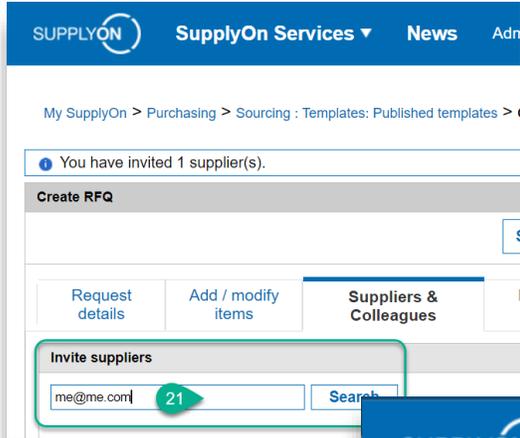
17.显示检测到的供应商列表。通过设置标记选择相关供应商。

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...

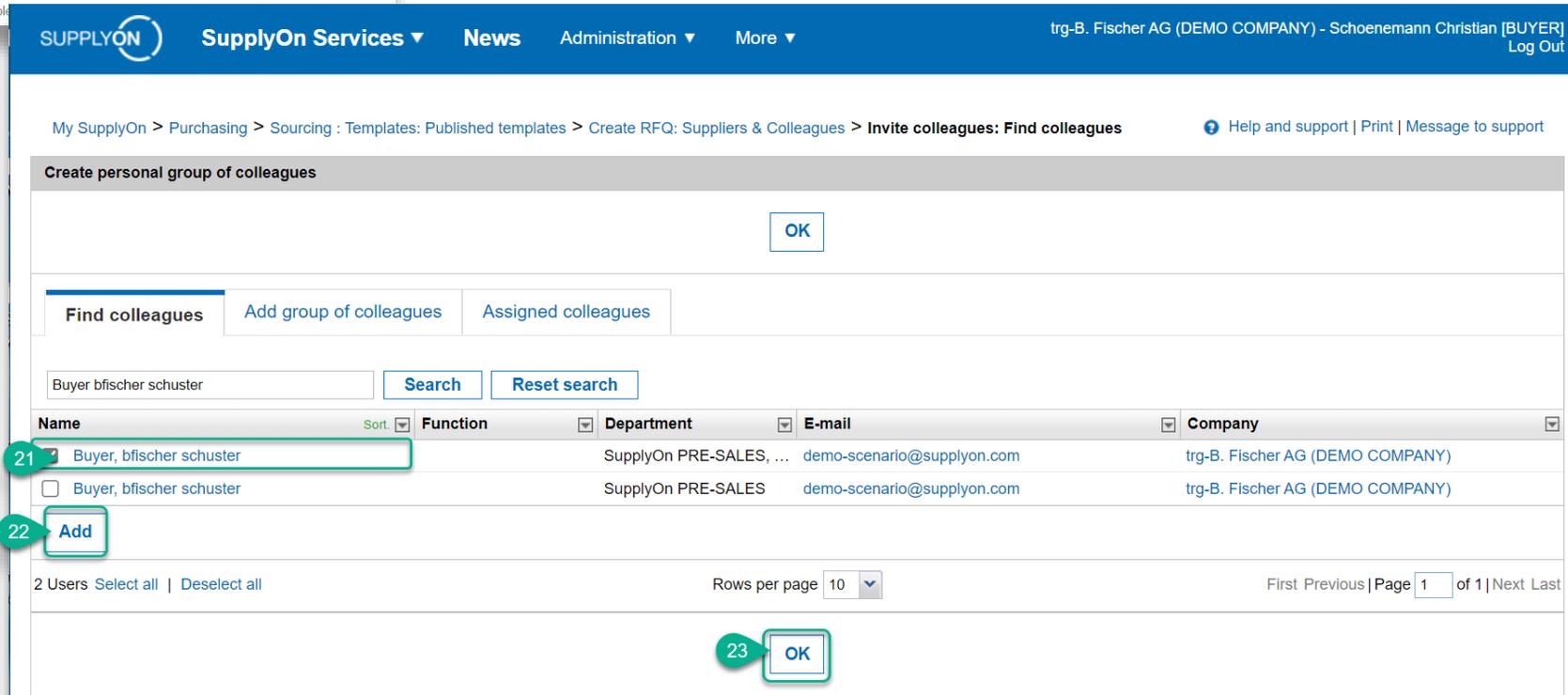
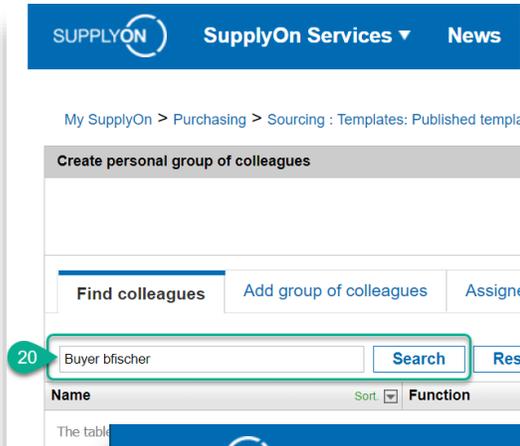
21. 输入经过验证的电子邮件地址（例如 `me@me.com`）并点击“Search”

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											
7											
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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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