

SupplyOn

# Click Guide: User Creation

## Capacity Management Assessment (CMA)



**Contact**

<https://contact.supplyon.com/en/>

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Version: 1.0

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# 1 How to create an User account

To create user accounts, you need to have the company administrator role. The account created during the registration is automatically a company administrator account.

The following Steps are necessary:

## 1. Login to SupplyOn

Follow this [link](#) to your Login Page. Go via the tab “administration” to your “User Management”.

## 2. Create user accounts

In your User Management you click on the “+ create user”.

## 3. Fill in required user details

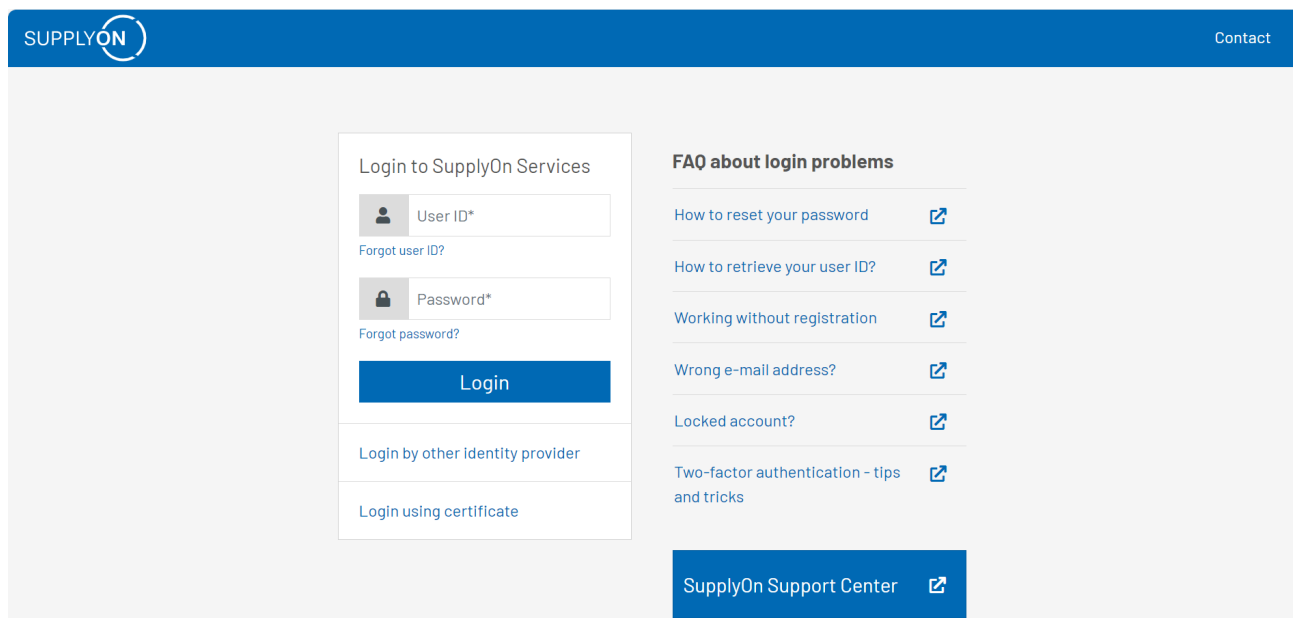
Fill in all mandatory fields, marked with “\*” and assign the necessary roles. For Capacity Management Assessment, you need the role: Supplier Capacity Assessment.

## 4. Start using SupplyOn

The new User will receive an invitation email to confirm their email address so they can start using SupplyOn.

## 1.1 Login to SupplyOn

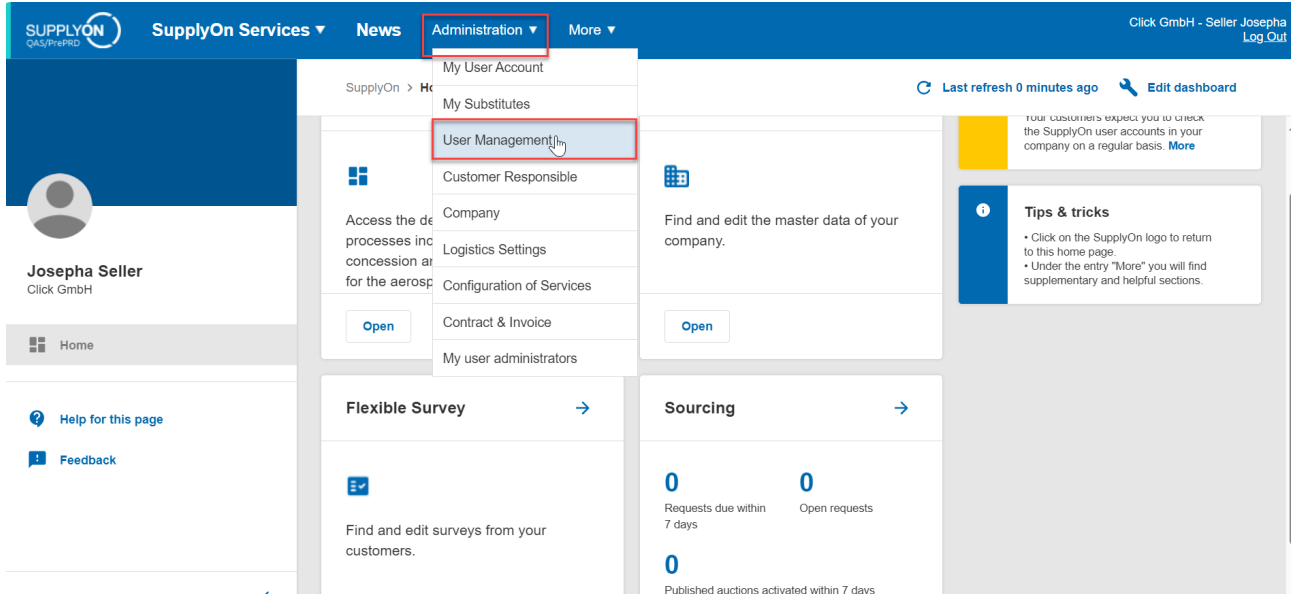
Follow this [link](#) to your Login Page.



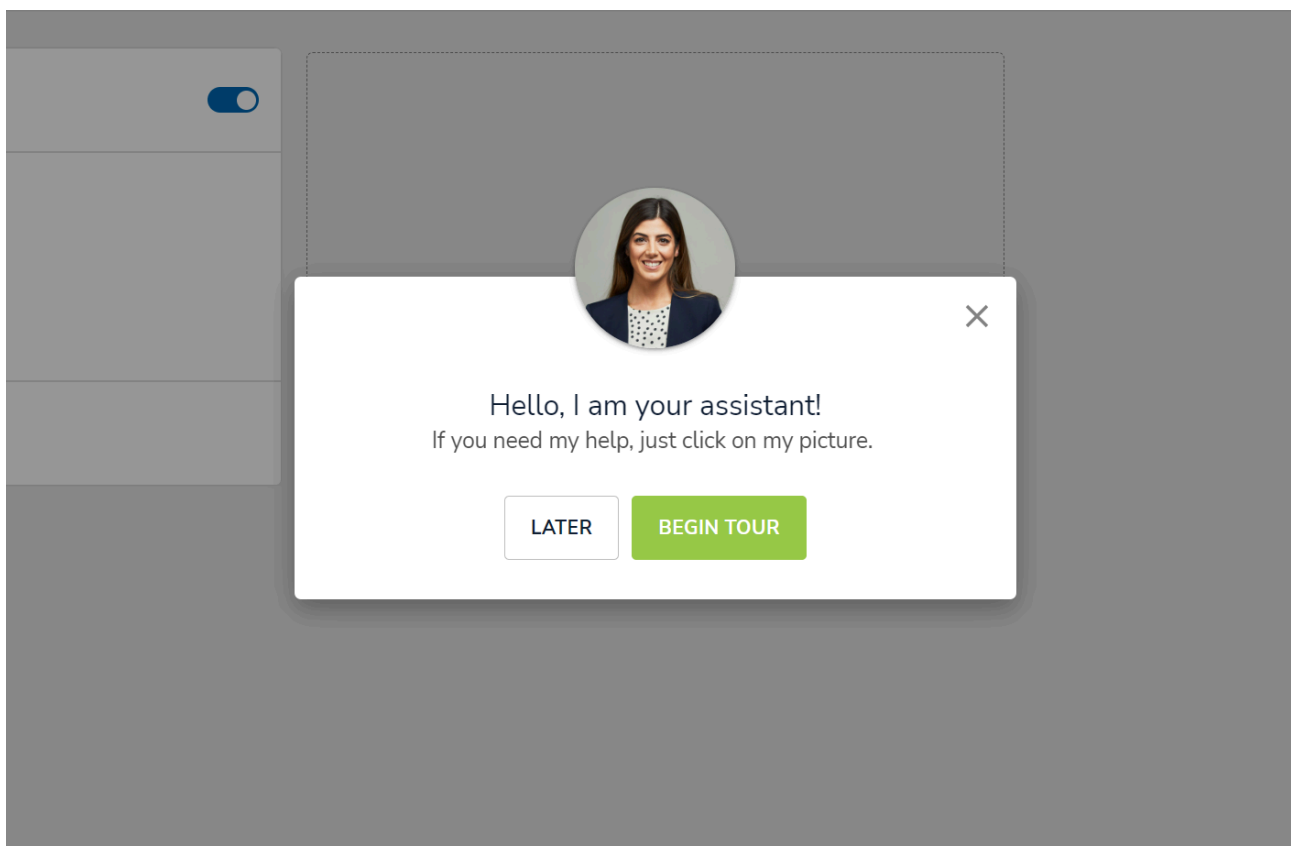
The screenshot shows the SupplyOn login interface. At the top left is the SUPPLYON logo, and at the top right is a 'Contact' link. The main content area is divided into two columns. The left column is titled 'Login to SupplyOn Services' and contains two input fields: 'User ID\*' with a 'Forgot user ID?' link below it, and 'Password\*' with a 'Forgot password?' link below it. A blue 'Login' button is positioned below these fields. Underneath the login fields are two links: 'Login by other Identity provider' and 'Login using certificate'. The right column is titled 'FAQ about login problems' and lists several links with external icons: 'How to reset your password', 'How to retrieve your user ID?', 'Working without registration', 'Wrong e-mail address?', 'Locked account?', and 'Two-factor authentication - tips and tricks'. At the bottom right of the right column is a blue button labeled 'SupplyOn Support Center' with an external icon.

## 1.2 Create User accounts

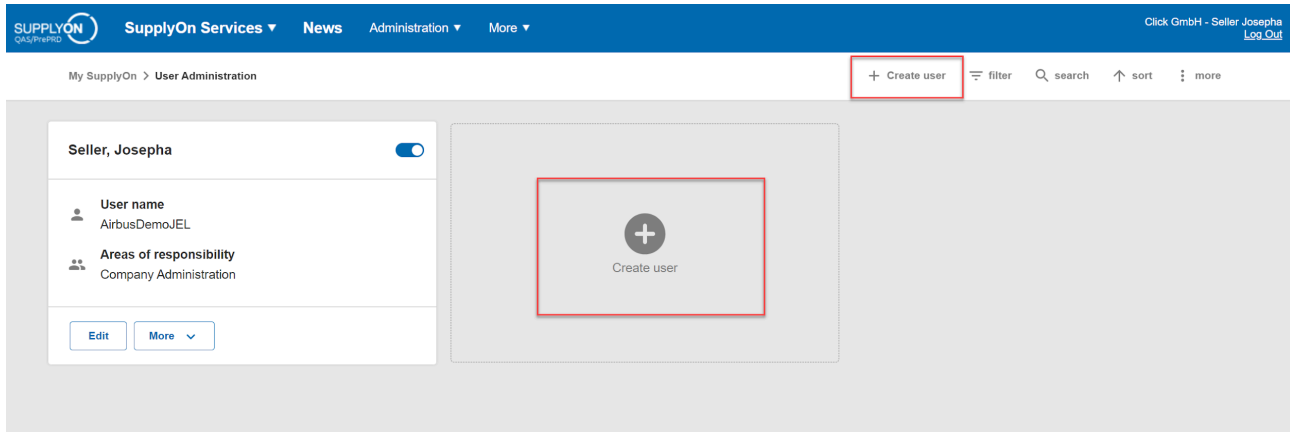
After you logged in, you click on the tab “Administration” and choose “User Management” in the drop-down menu.



When you are working in “User Management” for the first time, you will be offered a guided tour. Please feel free to click on “Begin Tour”, which will help you to understand the functionalities of User Management.



After you completed the tour, you can click on either of the buttons “Create User”. You can also edit your own user information on the left hand side, when you click “edit”.



After you clicked on “Create User” a window will pop up (see in Chapter 1.3 below).

## 1.3 Fill in the required User details

Scroll down and fill out all mandatory fields (marked with “\*\*”). You can ignore the toggle for ‘two-factor authentication’.

### Create user

\* Marked fields are mandatory.


<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">First name * <span style="float: right; font-size: x-small;">0 / 30</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Salutation * <span style="float: right;">▼</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">E-mail * <span style="float: right; font-size: x-small;">0 / 200</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Phone * <span style="float: right; font-size: x-small;">0 / 20</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Country * <span style="float: right; font-size: x-small;">Germany <span style="color: blue;">✓</span> ▼</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">State / province <span style="float: right; font-size: x-small;">0 / 20</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">City <span style="float: right; font-size: x-small;">0 / 30</span></div>	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Last name * <span style="float: right; font-size: x-small;">0 / 50</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Language * <span style="float: right; font-size: x-small;">English <span style="color: blue;">✓</span> ▼</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Mobile phone <span style="float: right; font-size: x-small;">0 / 20</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">ZIP code <span style="float: right; font-size: x-small;">0 / 10</span></div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">Street <span style="float: right; font-size: x-small;">0 / 40</span></div>
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### Create user


#### Account data

User name \*

Please create a unique user name. 0 / 30

Password \* 

Please enter a password.

Repeat password \* 

Please enter the password again.

#### Two-factor authentication

Two-factor authentication protects the SupplyOn account from unauthorized use. In addition to the user name and password, a one-time password is also used for login.

At the last step, choose the responsibilities the user should have. If the new User shall be a Company Administrator, check the role "Company Administration". Click "Save and close". It is recommended to have at least two Users with the role of Company Administrator.

#### Areas of responsibility

<input type="checkbox"/>	Name ↑	Description	More information
<input type="checkbox"/>	Company Administration	Company master data, users...	<a href="#">More information</a>
<input type="checkbox"/>	Quality Management	Supplier Quality Managemen...	<a href="#">More information</a>
<input type="checkbox"/>	Sales	Sourcing to Contract, Progre...	<a href="#">More information</a>

For Capacity Management, the role "Supplier Capacity Management" is needed. Please save the User and go to [Chapter 1.5](#) for further information.

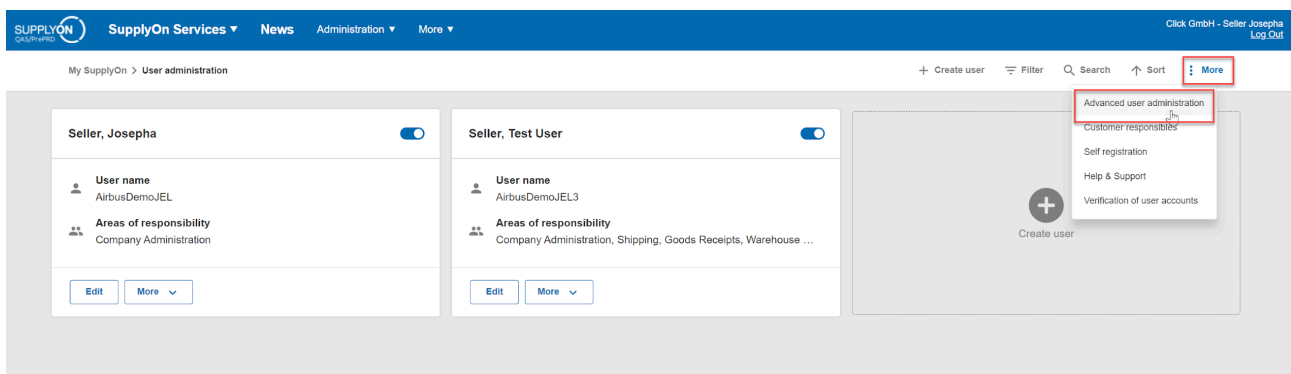
## 1.4

# Assign the role for Capacity Management Assessment

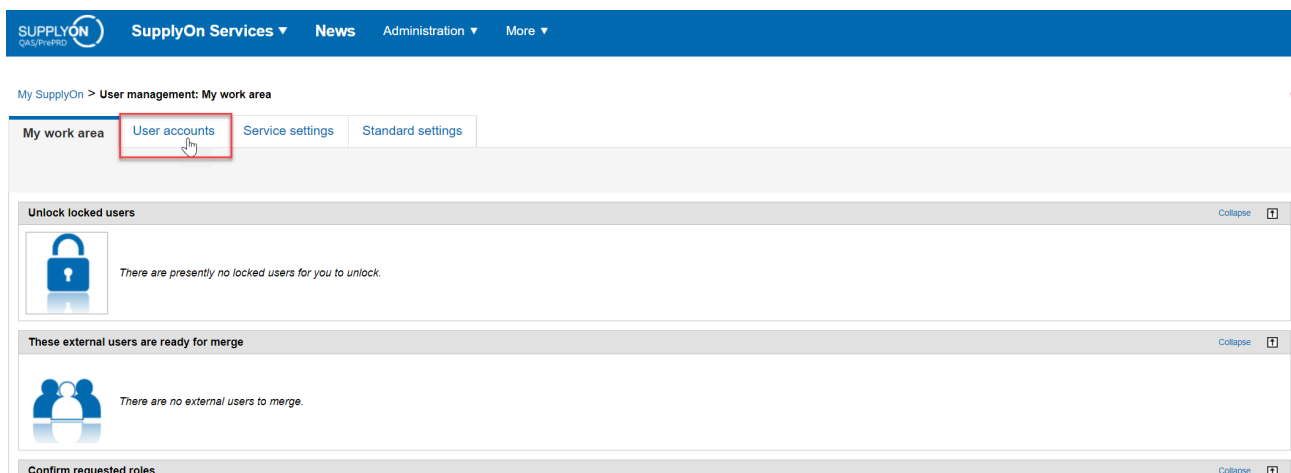
To use the service Capacity Management Assessment, the following role is required: **Supplier Capacity Assessment**.

Role	Status	Description
<input checked="" type="checkbox"/> Supplier Capacity Assessment	assigned	Access to the Assessment Section within the Capacity Management Service.

To assign this role, go to advanced user management. Click on “More” and then on “Advanced user administration”.



The view of the User Management will change to a more detailed version. Click on the tab “User accounts” to get to the overview of all Users of your company.



You will see an overview of all users of your company. Click on the User you want to assign the role to (here: AirbusDemoJEL3).



My SupplyOn > User management: User accounts Help and support | Print | Message to support

My work area **User accounts** Service settings Standard settings

Name, user ID, e-mail

All users  Locked users  Active users

Advanced Search

User ID	Name	Department	Status	E-mail	Company	D-U-N-S No.	Roles
<input type="checkbox"/> AirbusDemoJEL	Seller, Josepha		<span style="color: green;">●</span>	sim-migration@supplyon.com	Click GmbH		BusinessDirectorySupplierSt...
<input type="checkbox"/> AirbusDemoJEL2	Seller, Test User		<span style="color: green;">●</span>	sim-migration@supplyon.com	Click GmbH		BusinessDirectorySupplierSt...

2 Entries Select all | Deselect all Rows per page 10 | Page 1 of 1 Next Last

You are now in the Master data of the User. Click on the tab “Roles”.

My SupplyOn > User management: User accounts > Master data of Test User Seller

**Master data** **Roles** Service settings Substitutes Privacy settings

You are currently modifying: Seller, Test User (Click GmbH)

**Contact data**

Then expand the group “Other roles” and check the box of the role “Supplier Capacity Assessment”. Then click on “save”. The necessary role for Capacity Management Assessment is now assigned. (see below)

**Other Roles**

Role	Status	Description
<input type="checkbox"/> CorporateGroupMasterDataAdmin	not assigned	Master data administration for companies within a group.
<input type="checkbox"/> IndSellerAdmin-MD	not assigned	Material master data processing. Display of inventory projection and forecast settings.
<input type="checkbox"/> IndSellerAdmin-VMI	not assigned	Change VMI goods in transit.
<input type="checkbox"/> IndSellerAdminRead	not assigned	Show all relevant data for suppliers.
<input type="checkbox"/> IndSellerAlerts	not assigned	Editing of entries in the Alert Monitor.
<input type="checkbox"/> IndSellerConcession-Read	not assigned	Display concessions.
<input type="checkbox"/> IndSellerConfigAdmin	not assigned	Copy table- and search profiles to other users.
<input type="checkbox"/> IndSellerP2P-Read	not assigned	Access to transmitted electronic invoices.
<input type="checkbox"/> IndSellerPOOnly	not assigned	Purchase order processing (Collaboration). Display of material master data. Corresponds to the e-mail access (POEMA).
<input type="checkbox"/> IndSellerSales	not assigned	Displays of individual orders, forecasts, stock movements, Vendor Managed Inventory (VMI), self billing invoice and material master data. Display of inventory projection and forecast settings.
<input type="checkbox"/> RepairOrderResponsible-View	not assigned	Access to repair order screens and display of repair order details.
<input type="checkbox"/> RepairOrderResponsible-Write	not assigned	Access to repair order screens and editing of repair order fields.
<input checked="" type="checkbox"/> Supplier Capacity Assessment	not assigned	Access to the Assessment Section within the Capacity Management Service.
<input checked="" type="checkbox"/> SurveyRecipient	assigned	Receive surveys.
<input checked="" type="checkbox"/> UMDDefault	assigned	Permits processing of a user's own user profile.

Go back by clicking on “User management: User accounts”.

My SupplyOn > **User management: User accounts** > Roles of Test User Seller Help and support | Print | Message to support

You have assigned the selected areas of responsibility to the user.

Master data **Roles** Service settings Substitutes Privacy settings

You are currently modifying: Seller, Test User (Click GmbH)

Group by areas of responsibility  
Expand the areas of responsibility for a more precise roles assignment. Expand all | Collapse all

Save Discard changes Back

- Company Administration** (assigned): Company master data, users and permissions. Expand [icon]
- Order Fulfillment, Finance Processes** (not assigned): Supply Chain Management. Expand [icon]
- Quality Management** (not assigned): Supplier Quality Management (QM). Expand [icon]
- Sales** (not assigned): Sourcing to Contract, Progress to Order and Supplier Management. Expand [icon]
- Shipping, Goods Receipts, Warehouse Management** (not assigned): Shipping, goods receipts, warehouse management. Expand [icon]
- Supply Chain Administration** (not assigned): Demand, logistics and finance processes. Expand [icon]

**Other Roles** Expand [icon]

Save Discard changes Back

Optional: To change the view from advanced to standard user administration, click on “Standard user administration”. The standard view is the simple view with less details for easier usage.

My SupplyOn > **User management: User accounts** Help and support | Print | Message to support

My work area **User accounts** Service settings Standard settings

Name, user ID, e-mail

All users  Locked users  Active users

**Standard user administration**

User ID	Name	Department	Status	E-mail	Company	D-U-N-S No.	Roles
<input type="checkbox"/> AirbusDemoJEL	Seller, Josepha		<span style="color: green;">●</span>	slm-migration@supplyon.com	Click GmbH		BusinessDirectorySupplierSt...
<input type="checkbox"/> AirbusDemoJEL3	Seller, Test User		<span style="color: green;">●</span>	slm-migration@supplyon.com	Click GmbH		BusinessDirectorySupplierSt...

2 Entries   Rows per page: 10   Page 1 of 1

You will get back to the previous User Management view as below.

My SupplyOn > **User administration** + Create user Filter Search

**Seller, Josepha**

**User name**  
AirbusDemoJEL

**Areas of responsibility**  
Company Administration

**Seller, Test User**


**User name**  
AirbusDemoJEL3

**Areas of responsibility**  
Company Administration

## 1.5 The first steps for your new user within SupplyOn

The created User will receive an email with the request to confirm the email address and a link to log in. The User will have to change the initial password during the first Login. **Please remember to provide the new User with their username and password.** We recommend sending those in two separate emails.


Welcome to SupplyOn

 SupplyOn User Management (QAS) <usermanagement-qas@mail.supplyon.com>  
To: SLM-Migration

Retention Policy TAG\_DELETE\_90\_Days (90 days) Expires 09.04.2024

Reply Reply All Forward

Mi 10.01.2024 17:38



Dear Ms. Seller,

Welcome to SupplyOn. Your colleague Josepha Seller has just created your user account and will soon provide you with your password.

[Confirm your e-mail address and log on to SupplyOn](#)

Your user ID is: AirbusDemoJEL3

The following areas of responsibility were assigned to your user:

Area of responsibility	Description
Company Administration	Company master data, users and permissions.

The following roles were assigned to your user:

Role	Description
Seller	Bids submission in SupplyOn Sourcing. Note: Please update the settings under "Administration / Customer Responsible" so that the customer is proposed the right users when the RFQ is created.
SurveyRecipient	Receive surveys.

Here is some helpful information in case you are working with SupplyOn for the very first time:

- You will find brief instructions and videos for each solution in your service under the "Help and Support" link.
- SupplyOn offers [free video tutorials](#). If you need a more comprehensive training please [book one of our customized training courses](#).
- You can address to our [Customer Support](#) at any time.


We wish you a successful usage of SupplyOn.

Best regards  
Your SupplyOn Team

Please do not reply to this automatically created e-mail. If you have any questions, please contact our customer support.

After clicking on the link, the following website will open. Click on the link "Please proceed to the login page" to get to the Login page.

**E-mail address confirmation**

 Your email address was successfully confirmed.

[Please proceed to the login page.](#)

After logging in with the provided User Name and password by the User creator, a new password needs to be created.

### Change password

Please enter your old password.

[Forgot password?](#)

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**Password rules**

- You must enter at least 12 characters.
- You may only enter 20 characters.
- You must enter at least 1 uppercase letter.
- You must enter at least 1 lowercase letter.
- You must enter at least 1 special character.
- The following special characters are allowed: - \_/()\$%&!+\*#<>=
- You must enter at least 1 number.
- You must enter a password that is hard to guess.



**Confirm change**

### FAQ about login problems

- [How to reset your password](#) ↗
- [How to retrieve your user ID?](#) ↗
- [Working without registration](#) ↗
- [Wrong e-mail address?](#) ↗
- [Locked account?](#) ↗
- [Two-factor authentication - tips and tricks](#) ↗

**SupplyOn Support Center** ↗

### Most read

- [Change of the administrator](#) ↗
- [Technical requirements for the use of the platform](#) ↗
- [SupplyOn Start](#) ↗

Here you can see that before the new User approved the email address, it is marked with a yellow triangle. After the User confirmed the email address, the User is presented as in the second screenshot below.

Figure 1: E-mail address not confirmed

My SupplyOn > User administration + Create user Filter Q St


<b>Seller, Josepha</b> <input checked="" type="checkbox"/>	<b>Seller, Test User</b> <input checked="" type="checkbox"/>	 Create user
<b>User name</b> AirbusDemoJEL	<b>User name</b> AirbusDemoJEL3	
<b>Areas of responsibility</b> Company Administration	<b>Areas of responsibility</b> Company Administration	
<a href="#">Edit</a> <a href="#">More</a> ▾	<a href="#">Edit</a> <a href="#">More</a> ▾	

Figure 2: E-mail address confirmed