

Handout for the SupplyOn Service Document Management



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1 About this Manual

This manual shows you how to access, download and process a document provided by your customer and how to actively request a document from your client.

1.1 Abbreviations

Abbreviation	Meaning
DMS	Document Management System
PO	Purchase Order

2 How to access a new document provided by your customer

To work with SupplyOn, your company administrator needs to set up an account and initial password for you. The administrator will assign the appropriate roles to you ([see chapter 7, Roles and Rights](#)).

As soon as your customer creates or changes a document in his ERP system, the SupplyOn application sends an e-mail notification to the e-mail address stored in your user account.

You can log in to SupplyOn via the e-mail notification

1. by clicking on the **Name/No.** link,

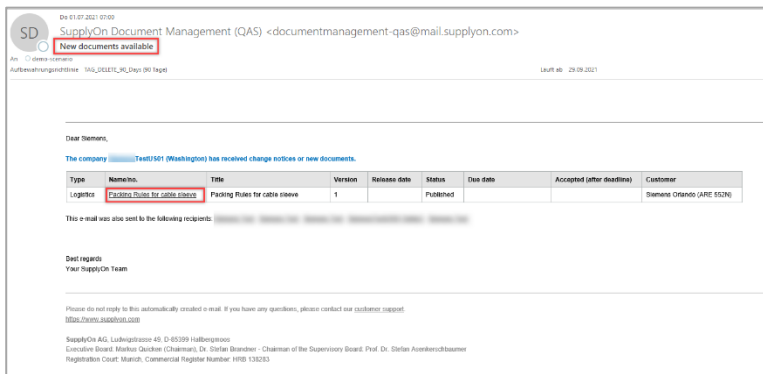


Figure: E-Mail notification on a new or changed document

Document Management displays the corresponding document details.

2. Download the document by clicking on the link in the **Attachments** area.

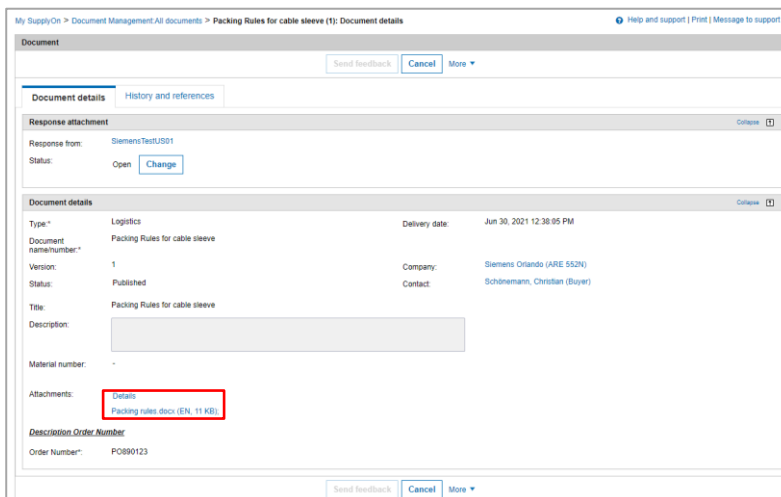


Figure: Document Management: All documents with the corresponding document from e-mail

3. Alternatively, you can open an internet-browser and log in to SupplyOn.

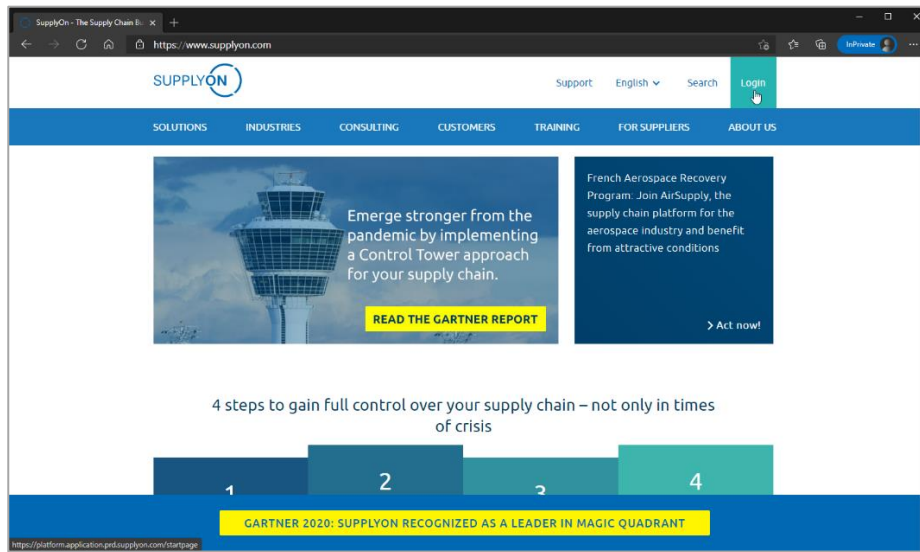


Figure: SupplyOn home page with Login button

Depending on your roles, you may see different tiles than used in the following screenshot.

4. Click the tile **Document Management**

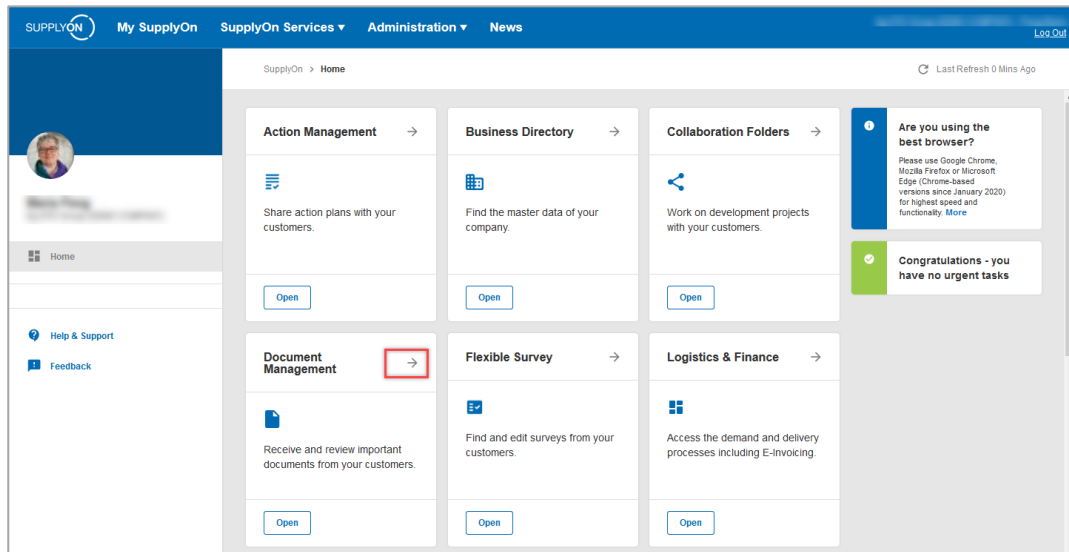


Figure: Home screen with tiles per application and actual notifications

Within the different tabs you see documents in different status:

- ✓ Open/new - all documents you have not yet accepted/declined or read
- ✓ Responded - all documents you have either accepted or declined
- ✓ Subscribed - all documents you can subscribe. **Note:** This function is not used by Siemens
- ✓ All - all documents
- ✓ Sent Documents – all documents you have requested from your customer. This function is described [here](#).

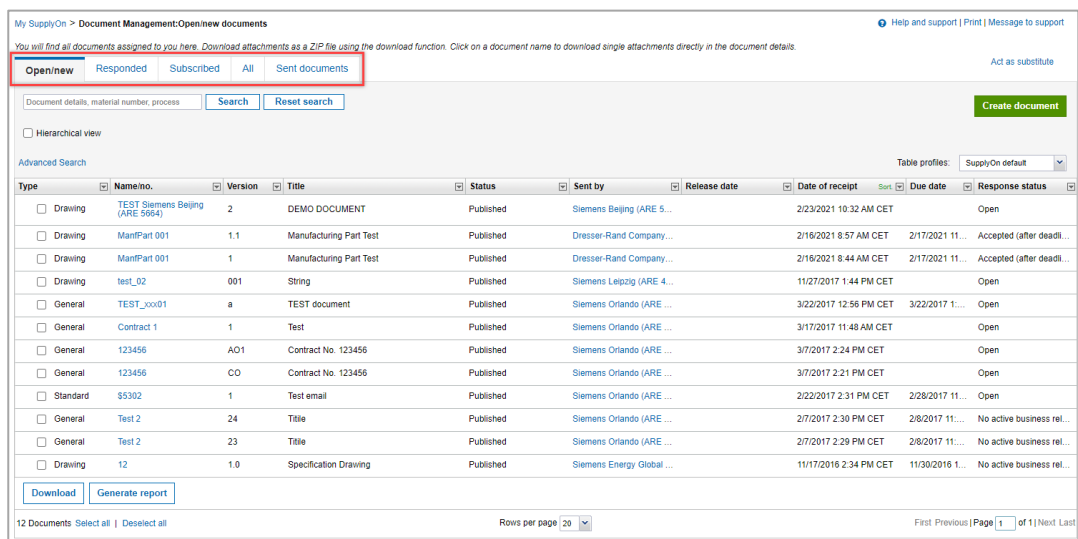


Figure: Document Management with all available tabs

In the Open/new tab you can search for documents using the **Search** field or the **Advanced Search**. In the Search field enter for example a document name or title.

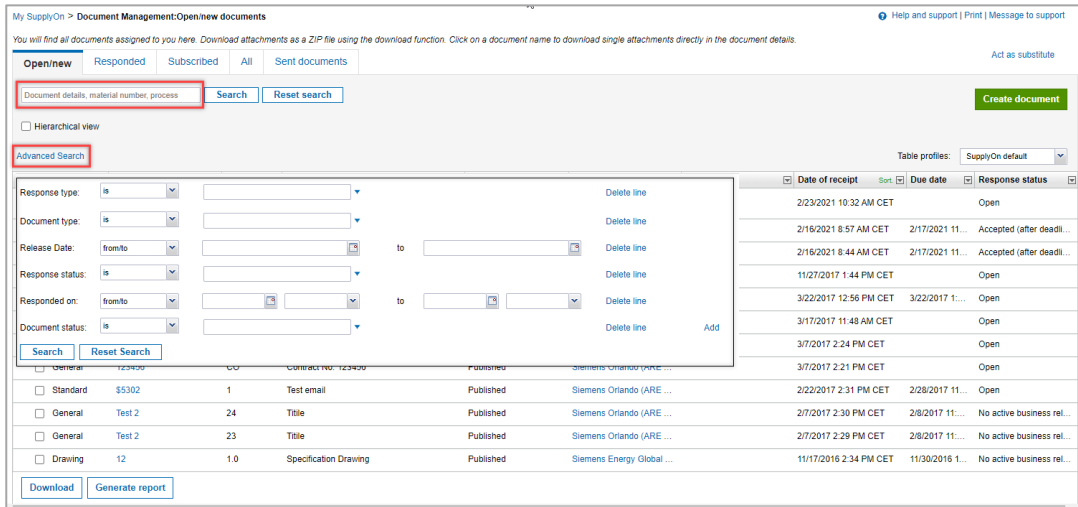


Figure: Document Management: Open/new documents with Search field and activated Advanced Search

You can add additional fields to the **Advanced Search** like the PO number.

5. Click **Add**

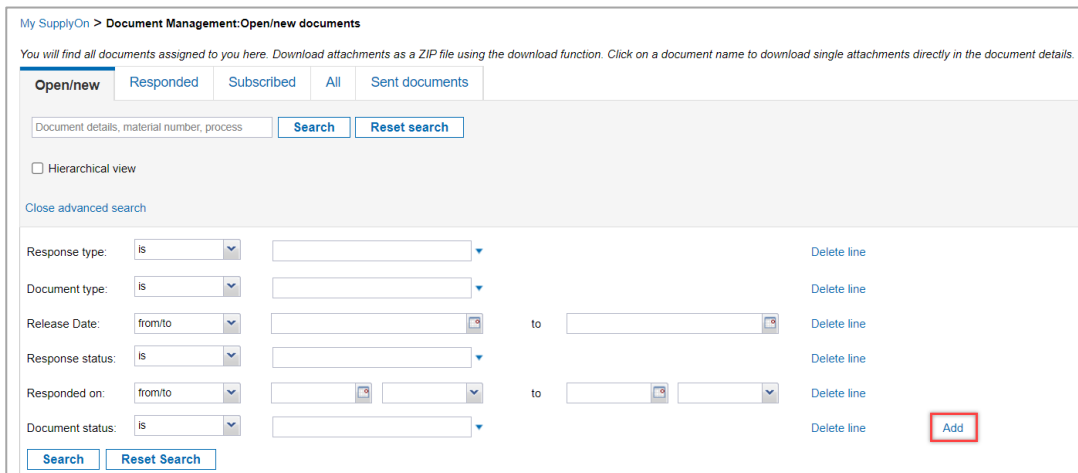


Figure: Document Management: Open/new documents with Advanced Search and button Add

Within the list of **Additional fields**

6. select the **Purchase Order No.**
7. and click **Apply**.

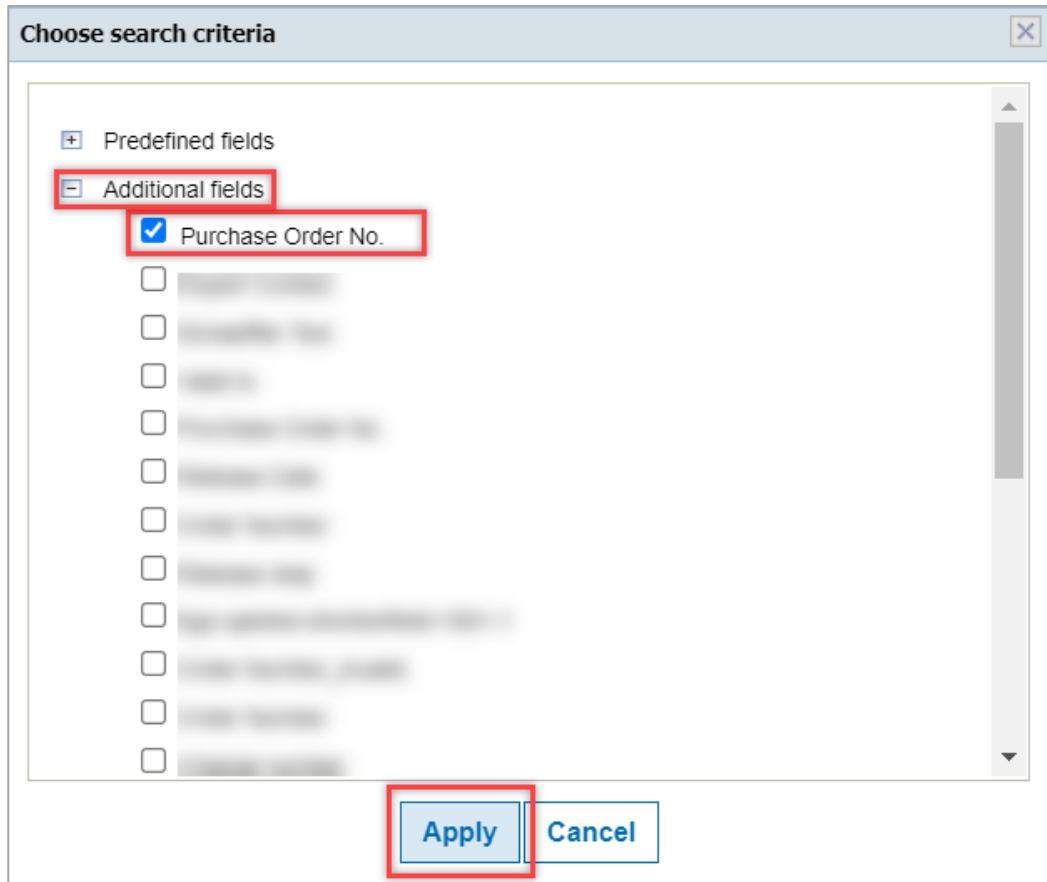
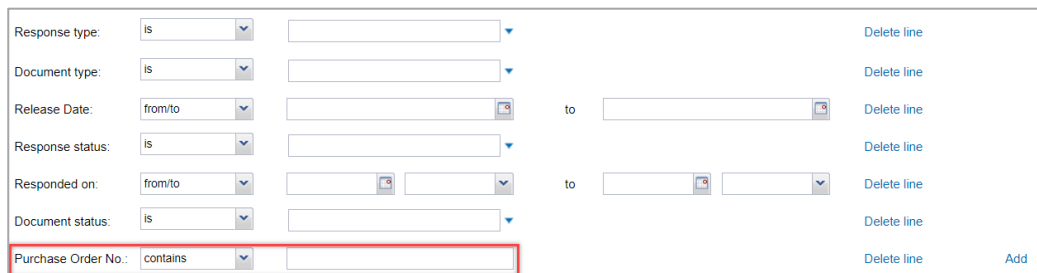


Figure: Within **Advanced Search** the **Choose search criteria** screen with **Predefined** and **Additional fields**

The new Search Criteria is added.



In the tabs **Open/new**, **Responded**, **Subscribed** and **All** you can download one or more documents at the same time.

- Set the tick in front of the documents you want to download and click **Download**.

My SupplyOn > Document Management:Open/new documents

You will find all documents assigned to you here. Download attachments as a ZIP file using the download function. Click

Open/new Responded Subscribed All Sent documents

Document details, material number, process

Hierarchical view

Advanced Search

Type	Name/no.	Version	Title
<input checked="" type="checkbox"/> Drawing	...	2	DEMO DOCUMENT
<input checked="" type="checkbox"/> Drawing	...	1.1	Manufacturing Part Test
<input checked="" type="checkbox"/> Drawing	...	1	Manufacturing Part Test
<input type="checkbox"/> Drawing	...	001	String
<input type="checkbox"/> General	...	a	TEST document
<input type="checkbox"/> General	...	1	Test
<input type="checkbox"/> General	...	AO1	Contract No. 123456
<input type="checkbox"/> General	...	CO	Contract No. 123456
<input type="checkbox"/> Standard	...	1	Test email
<input type="checkbox"/> General	...	24	Title
<input type="checkbox"/> General	...	23	Title
<input type="checkbox"/> Drawing	...	1.0	Specification Drawing

12 Documents [Select all](#) | [Deselect all](#)

Figure: Document Management: Open/new documents with Download of selected documents

3 Accept or decline a document

3.1 Accept or decline a document within an agreed timeline

If agreed with your customer, you are expected to accept (or decline) a document provided within an agreed timeline. If you do not process the document within the timeline, it is automatically accepted by a system rule as described in chapter 3.2.

You are already logged in to SupplyOn, and the **Open/new** tab of DMS is opened. To check all information the customer gave you, select a document.

1. and click into the **Name/no.**

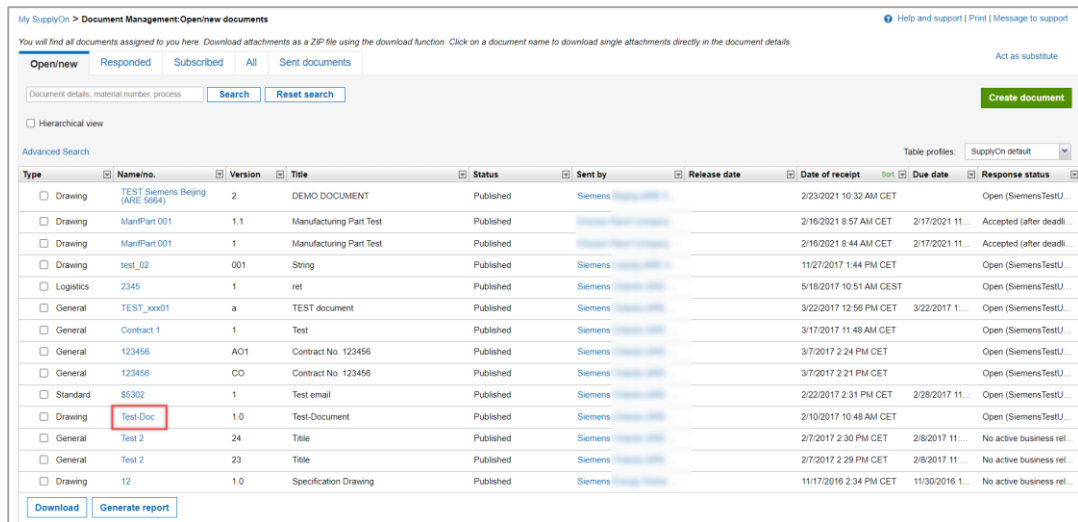


Figure: Document Management with the active tab **Open/new**

2. If not already done, download the document and check it before accepting it.

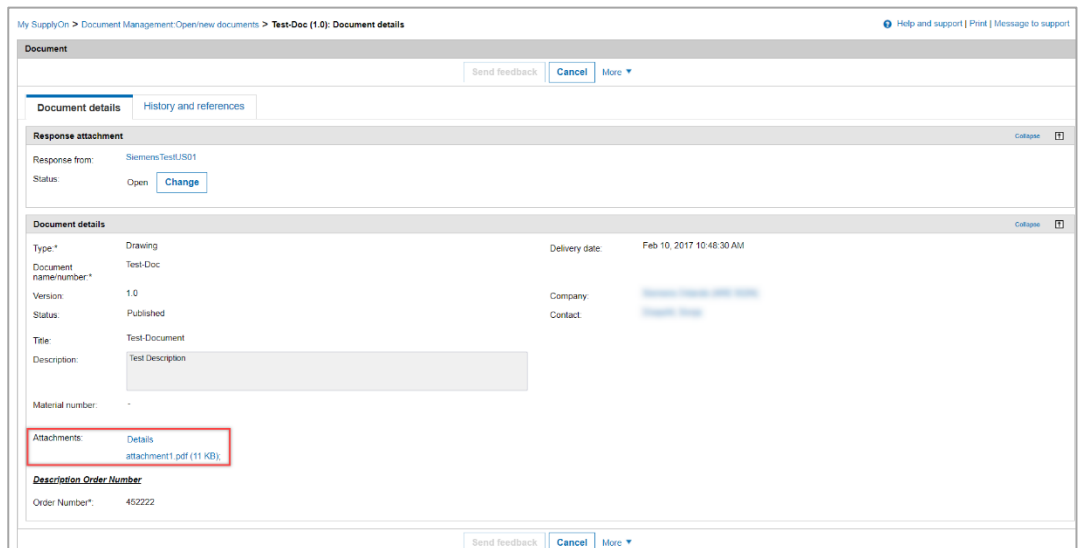


Figure: Document Details with Attachment

After checking the details, you can accept (or decline) the document

3. by clicking **Change**.

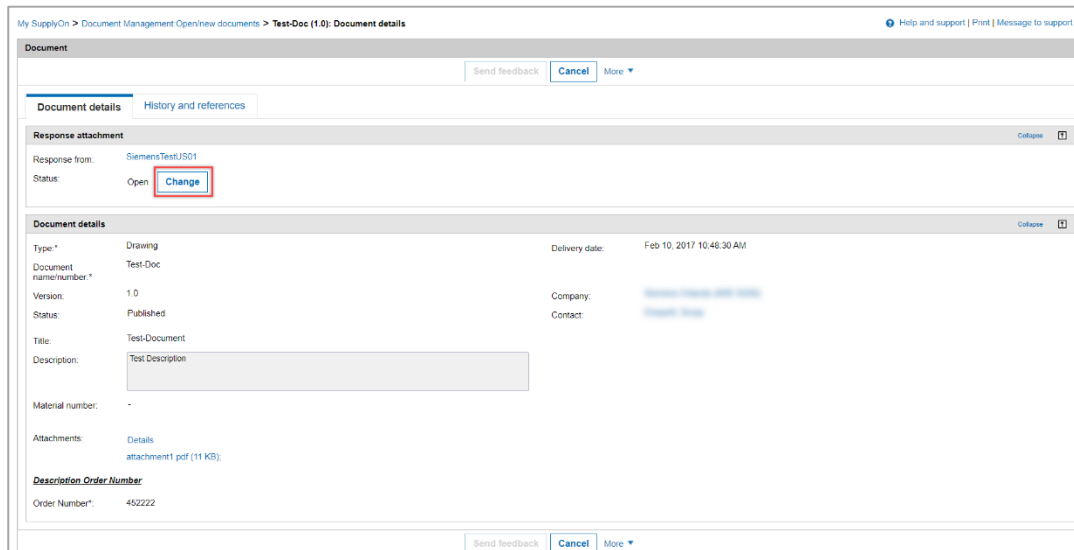


Figure: Document Details with button Change

4. Select **Accept** (or **Decline**) the document.

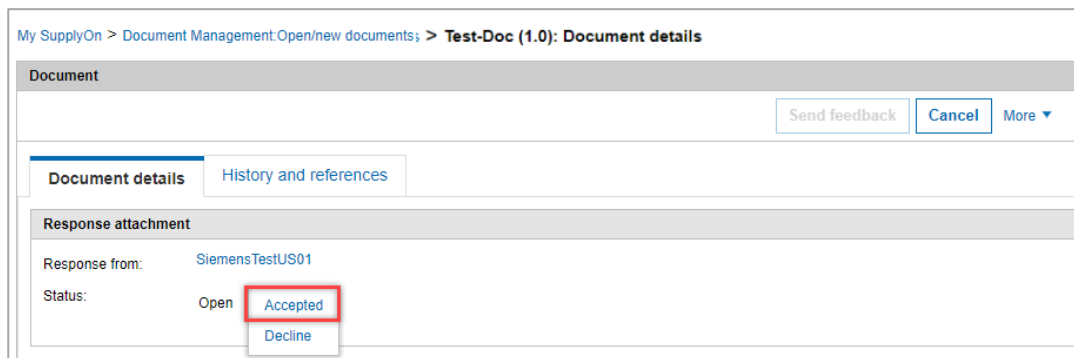


Figure: Document Details with Accept or Decline possibility

NOTE: If you **accept** a document, you are not able to **decline** again. If you **decline** a document, you can **accept** later on again.

After accepting the document, the status changes.

5. Click **Send Feedback**.

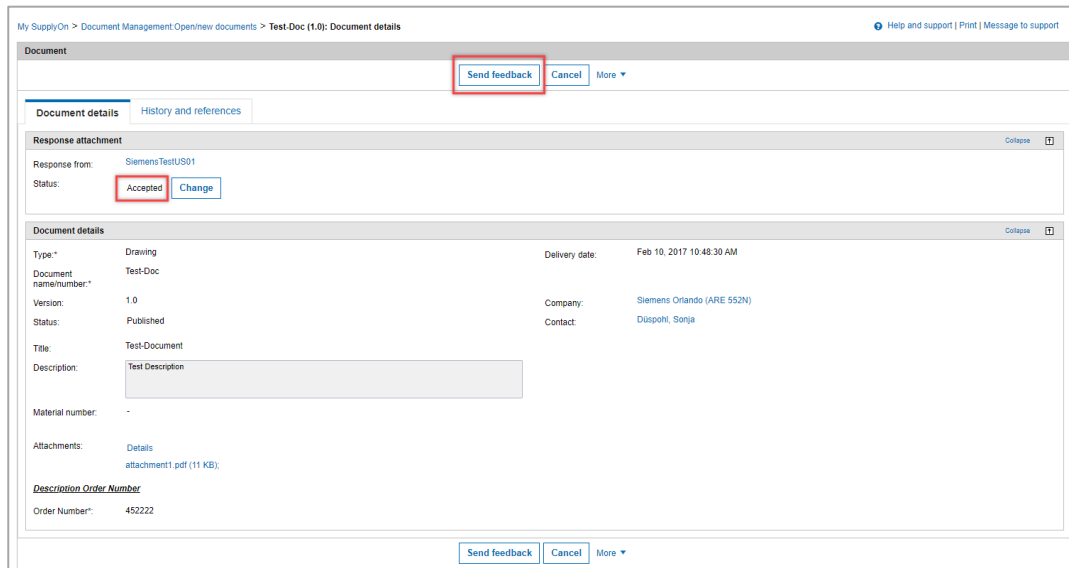


Figure: **Document Details** with Status Accepted

The document is no longer available in the **Open/new** tab and is now in the **Responded** tab with the status **Accepted**. The response status is sent to your customer.

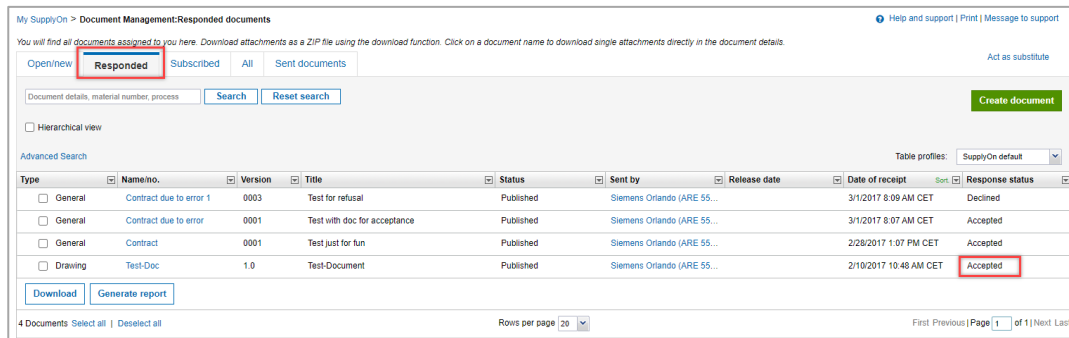


Figure: **Document Management: Responded documents** with Accepted and Declined documents

3.2 Document is automatically accepted after deadline

Your customer sent you a new document and expects it to be either accepted or declined within a specific period (due date). For this purpose, regular reminders are sent to you by e-mail.

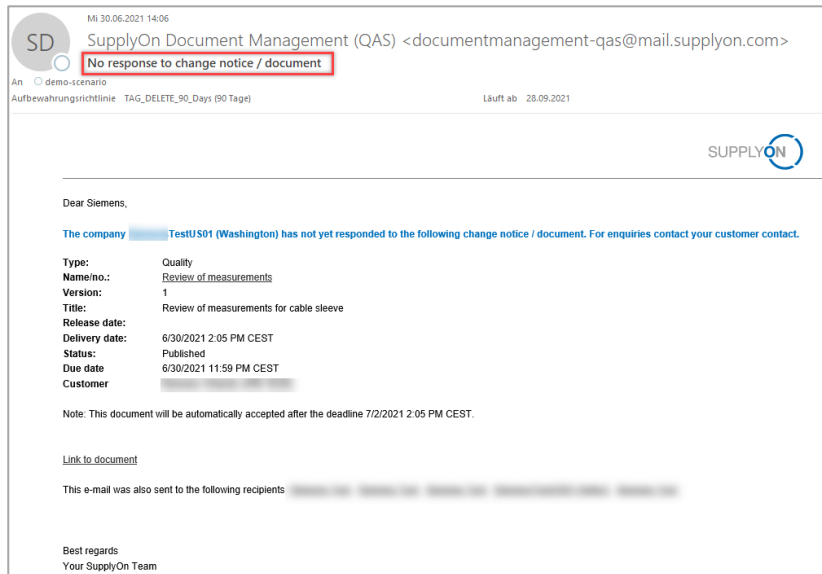


Figure: Possible e-mail reminder

Process the document as agreed with your customer within the agreed timeline.

If you do not process the document within the due date, it is automatically accepted by a system rule after deadline. You get an email notification about documents automatically accepted after deadline.

1. Click on the **Name/no.** link

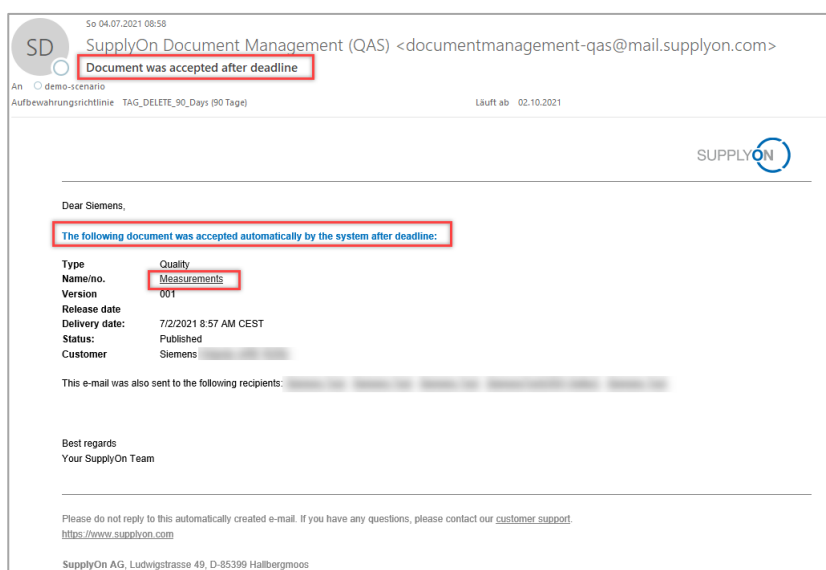


Figure: Possible e-mail notification for automated acceptance

Document Management displays the corresponding document details. The document is shown with the new status **Accepted (after deadline)**.

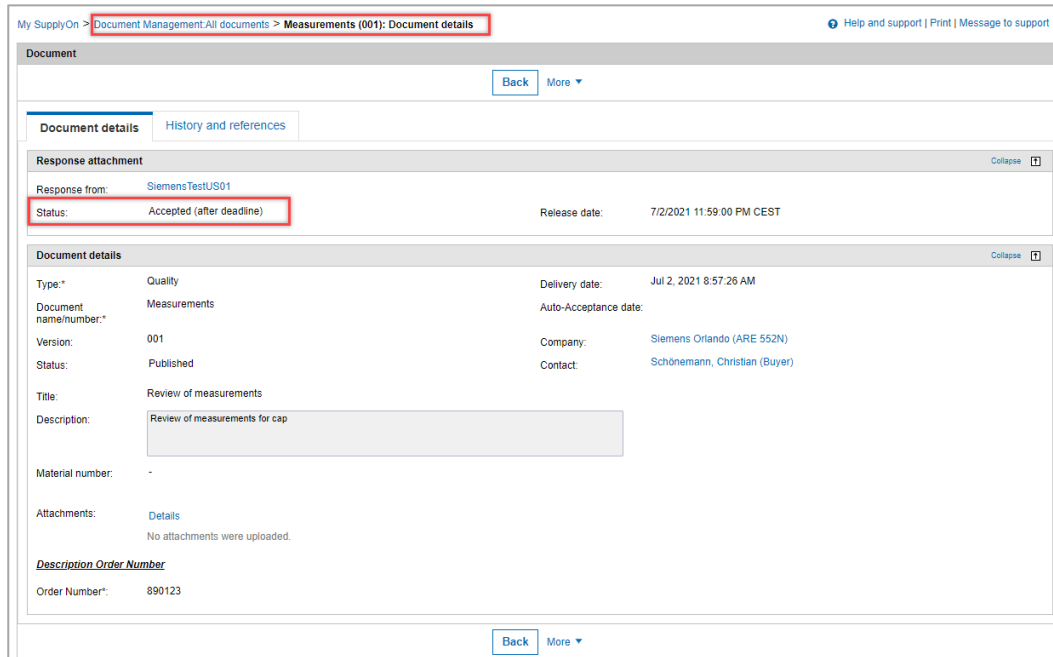


Figure: Document Management All documents shows document in the status **Accepted (after deadline)**

You can find the document also in the tab **All** with the appropriate status.

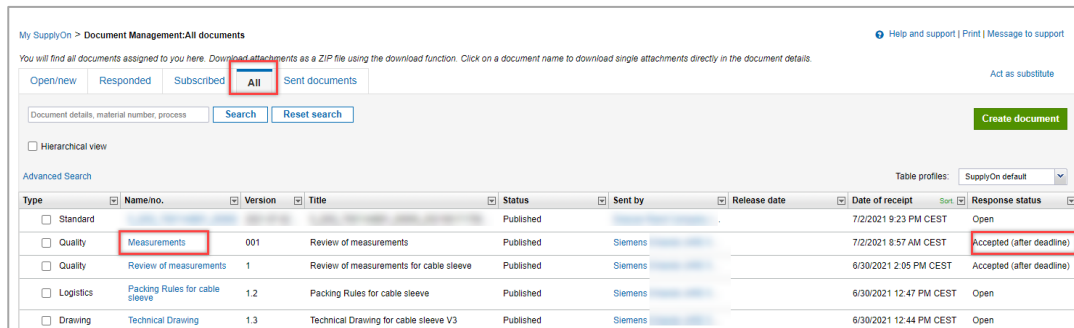


Figure: Tab All documents with documents in the status **Accepted (after deadline)**

4 How to access and process a changed document provided by your customer

In case your customer creates a new version of a document,

1. you will receive an e-mail notification related to a new document.

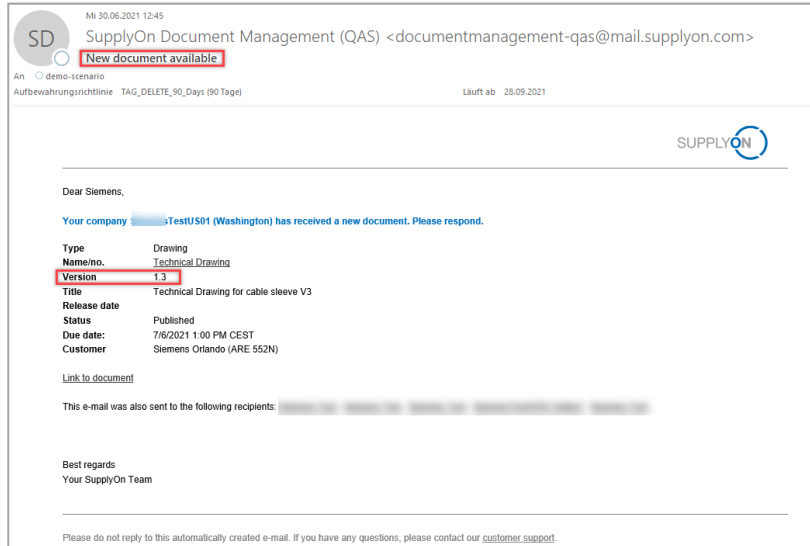


Figure: Possible e-mail notification for a versioned document

2. To check the version history, open the document with a click into the **Title**. The document is displayed.
3. Click **History and References**.

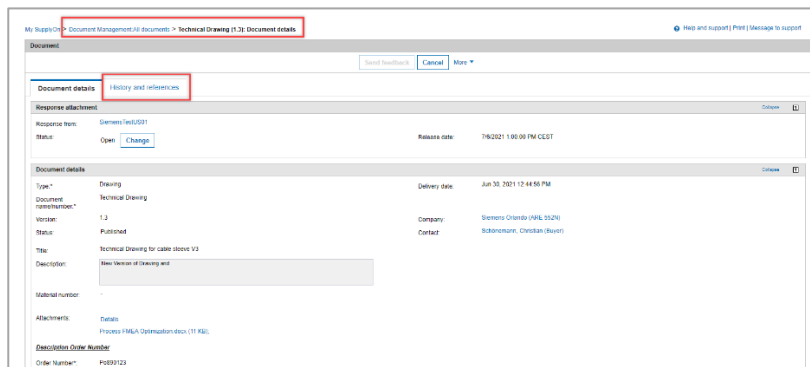


Figure: Document Management: All documents

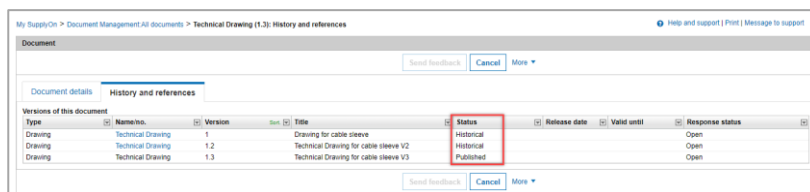


Figure: Document Management: All documents with the tab History and References

5 Alternative access to a document via a purchase order (PO)

In addition to providing the documents via DMS and notifying you via email, your customer includes a link in the PO, which gives you an alternative access to the document.

You are already logged in to SupplyOn.

1. On the **My SupplyOn** page, open the tile **Logistics & Finance**.

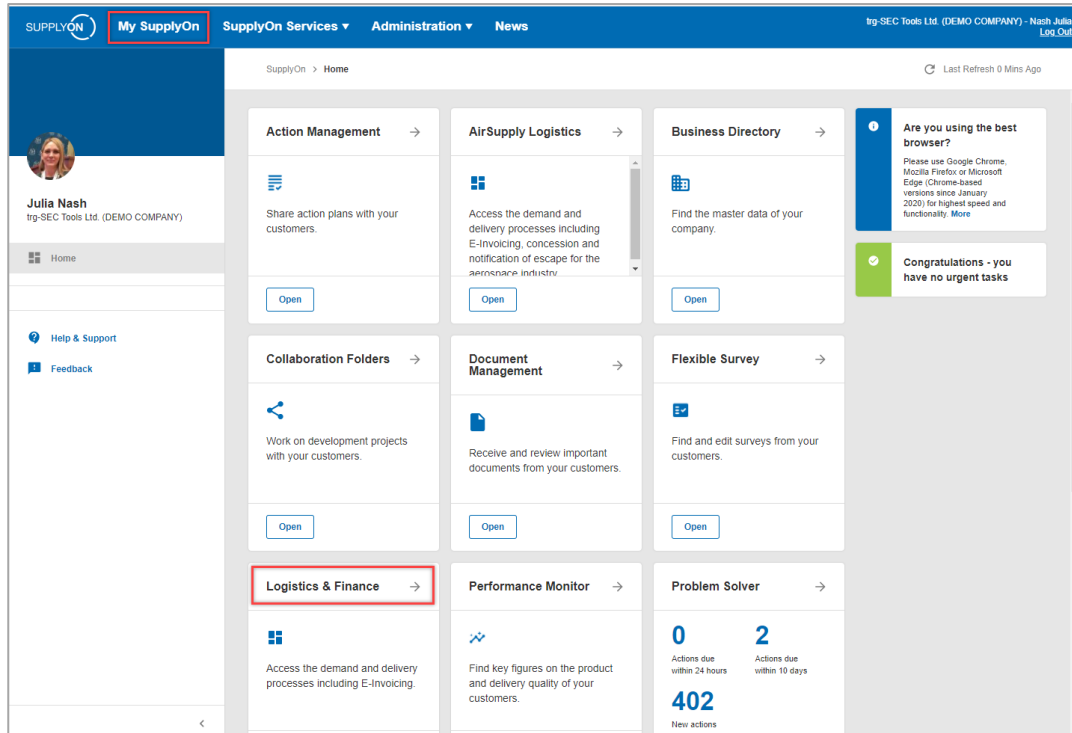


Figure: Home screen with tiles per application and actual notifications

2. Within the **Dashboard** open the **Orders**.

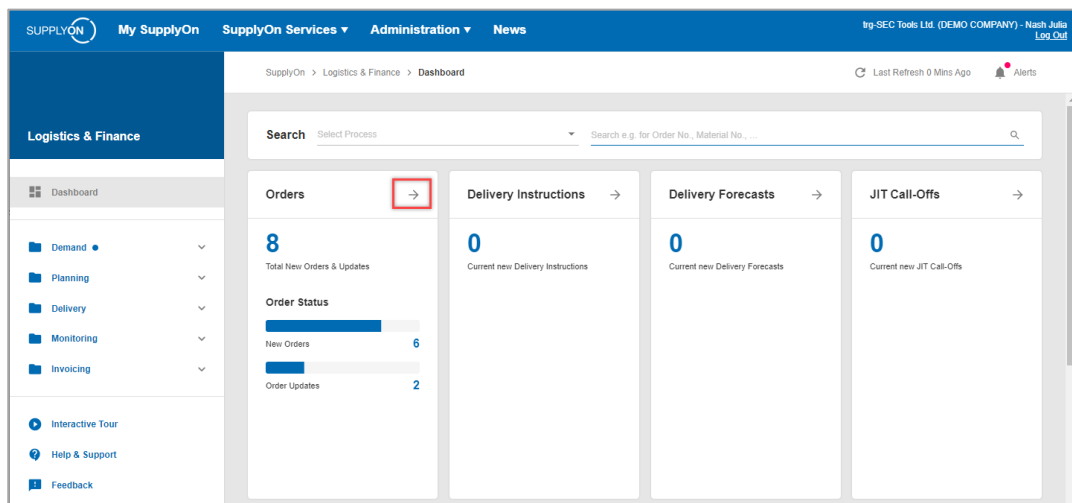


Figure: Dashboard / tile / Orders

- To check the order details, open the corresponding order **by clicking on it anywhere in the line:**

Org. Bu.	Plant Customer	Plant Code	Planner	Consignee Name	Unloading Point	Order Number	Positions	Order Date	Last Change D.	Status	History	Attachments	Respond-by	Confr.
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101471	1	17/05/21	18/05/21 09:47	read			23/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101470	1	17/05/21	18/05/21 09:47	read			23/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101469	1	17/05/21	18/05/21 09:47	new			23/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101468	1	17/05/21	18/05/21 09:47	new			23/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101467	1	17/05/21	18/05/21 09:47	new			23/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101466	1	09/05/21	10/05/21 17:59	read			15/05/21 18:00	No
BFAG	B. Fischer Italia	IT01		B. Fischer Italia S.p.A	Porta 1.4	55101465	1	09/05/21	10/05/21 17:59	read			15/05/21 18:00	No

Figure: Orders / Overview

The order details screen is opened.

- With a click on the **Link**,

Order: 55101465 - Customer: trg-B. Fischer AG (DEMO COMPANY), Customer Plant Code: IT01

LI	Material Number	Material Description	Unloading Point	Net value	First Delivery Date	UoM	Qty	Respond-b.	Response	Respons...	Delivery Sta...	Responded by	Invoice Status
10	345828	O-Ring Sealing (silic...	Porta 1.4	595.20 EUR	15/06/21	EA	496	15/05/21 1...		no respo...	Open		

Pos. 10: 345828 - O-Ring Sealing (silicone rubber)

Change Level: 01/10 Price per price unit: 120.00 EUR
 Supplier Material Number: O-Ring 345828 Net Value: 595.20 EUR
 Unloading Point: Porta 1.4 Price Unit: 100
 Ordered Quantity: 496 EA Last Change: 08/05/21

Line Item Details
 Warehouse: place 15 Contract Number: 55000001
 Place of Consumption: Regal 2 VAT: 19.00 %

Product information: Gaskets are normally made from a flat material, a sheet such as paper, rubber, silicone, metal, cork, felt, neoprene, nitrile rubber, fiberglass, polytetrafluoroethylene (otherwise known as PTFE or Teflon) or a plastic polymer (such as polychlorotrifluoroethylene). One of the more desirable properties of an effective gasket in industrial applications for compressed fiber gasket material is the ability to withstand high compressive to ads. Most industrial gasket applications involve bolts exerting compression

Links: https://platform.application.prd.supplyon.com/oms/faces/index.js?_afcdmsed1=bt.dv/leadingBold.ike.520100903

Buyer Information				Supplier Information				
Commit	Requ. Del.	Requ. Qty.	Cum. Dev.	PSID	Del. Date	Del. Qty.	Comment	Last Resp.
Fix	15/06/21	496	0		15/06/21	496		Split Delivery
Total planned		496						
Total shipped		0						
Total pending ASN quantity		0						

Supplier Response
 No Response
 Confirm as-is
 Respond with change

Supplier Reference:
 Supplier Material Number: O-Ring 345828
 Supplier Material Description:

Figure: Order sealing details with a link to Document Management

DMS automatically opens up the **All** tab and displays the corresponding document. You can process the document according to your agreements with the customer as described in [chapters 2 and 3](#).

The screenshot shows the 'Document Management: All documents' page in the SUPPLYON system. The interface includes a navigation bar with 'My SupplyOn', 'SupplyOn Services', 'Administration', and 'News'. The main content area has tabs for 'Open/new', 'Responded', 'Subscribed', 'All', and 'Sent documents'. A search bar is present with 'Search' and 'Reset search' buttons. Below the search bar, there is a 'Hierarchical view' checkbox and an 'Advanced Search' section. A table of documents is displayed with columns: Type, Name/No., Version, Title, Status, Sent by, Release date, Date of receipt, and Response status. The first row is highlighted with a red box and contains the following data: Type: Drawing, Name/No.: 890128 Casing, Version: 1.1, Title: Cylindrical Casing 890128, Status: Published, Sent by: trg-B. Fischer AG (DEM...), Release date: 17/06/2016, Date of receipt: 17/06/2016 13:15 CEST, Response status: -. Below the table are 'Download' and 'Generate report' buttons. At the bottom, there is a summary '1 Document' and a pagination control showing 'Page 1 of 1'.

Type	Name/No.	Version	Title	Status	Sent by	Release date	Date of receipt	Response status
<input type="checkbox"/>	Drawing 890128 Casing	1.1	Cylindrical Casing 890128	Published	trg-B. Fischer AG (DEM...	17/06/2016	17/06/2016 13:15 CEST	-

Figure: Document Management: All documents with the related result

6 How to actively request a document from your customer (Pull on Request)

You can use the Document Management system to actively request required documents from your customer. The request is automatically transferred to the customer ERP system.

When your customer fulfills this request, you will receive an email notification and the provided document will be displayed under the **Open/new** and **All** tabs, and under **Referenced Files** in the **Sent Documents** tab.

6.1 Document request related to Material

You are already logged in to SupplyOn and the **Open/new** tab of DMS is opened.

1. Click **Create document** to start a request.

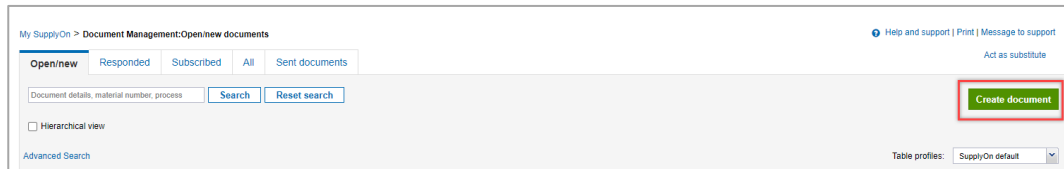


Figure: **Document Management: Open/new documents** overview with **Create document** button

The overview of all locations providing documents on request is displayed.

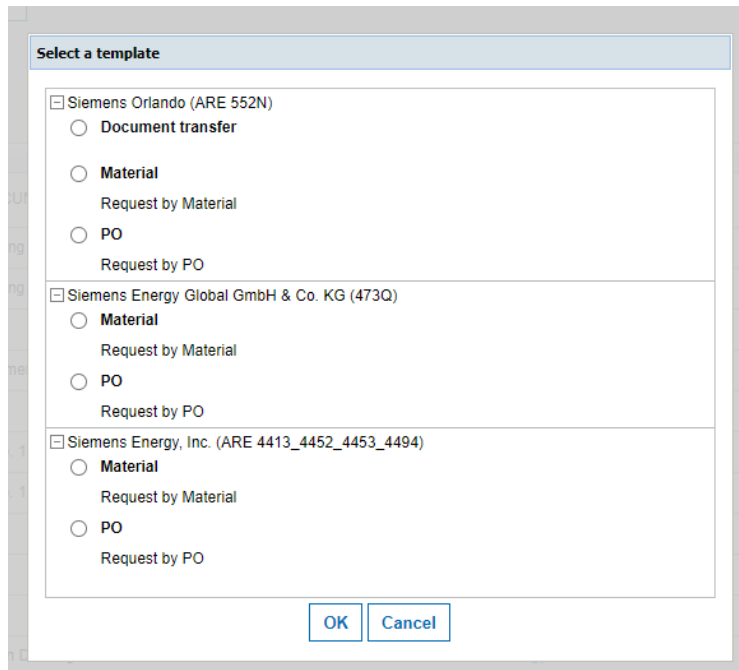


Figure: **Select a template** screen – define the customer you would like to request a document from

2. Select from which customer you would like to receive additional information to a specific material number and confirm with **OK**.

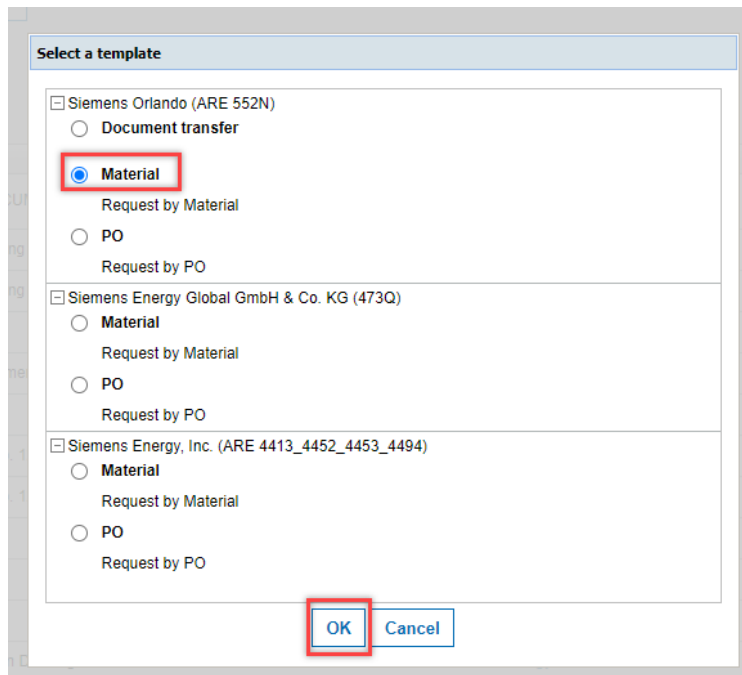


Figure: **Select a template** screen with activated radio button for material

3. Fill at least the mandatory fields and click **Send**. You can use the Document no. as a reference to identify your request when the customer provides the corresponding document.

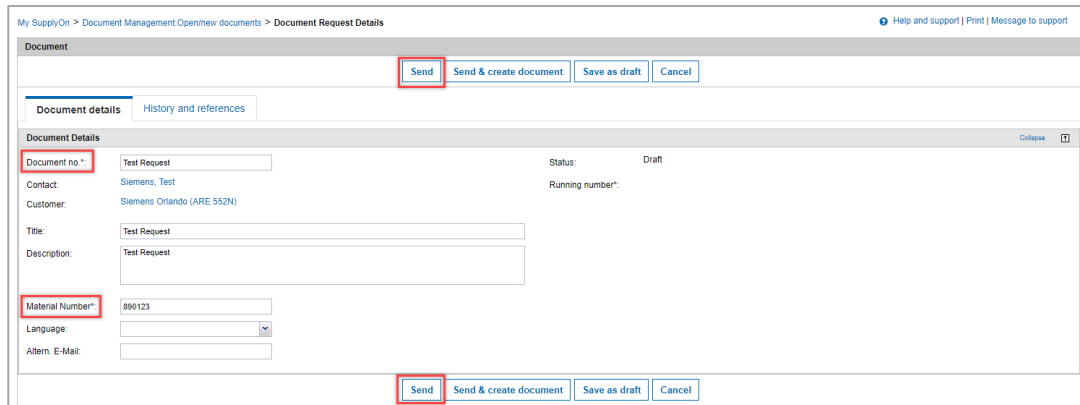


Figure: **Document Request Details**

The new request is displayed in the tab **Sent documents**.

When your customer fulfills this request, you receive an email notification and the provided document appears under the **Open/new** and **All** tabs, and in the **Sent Documents** tab under **Referenced Files**.

Access and download the document either as described in [chapter 2](#) or by click on the appropriate link under **Referenced files** once available. Or process the document as described in [chapter 3](#) (dependent on the agreement with your customer).

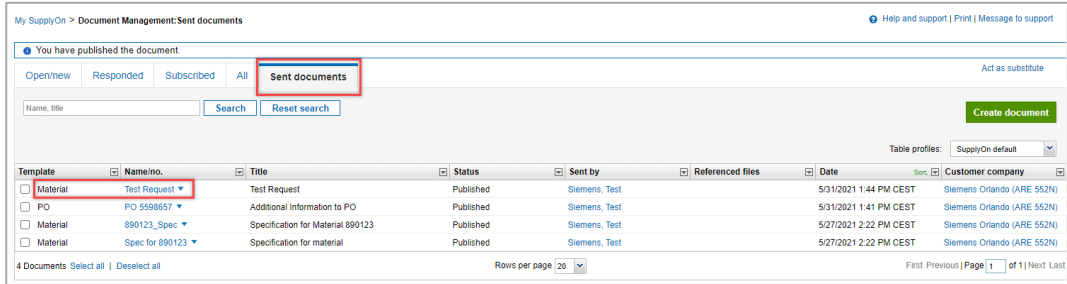


Figure: Document Management: Document request in the **Sent documents** screen

6.2 Document request related to PO

The approach to request a document by PO reference is exactly the same as described [here](#). Just select the PO as a reference instead of material.

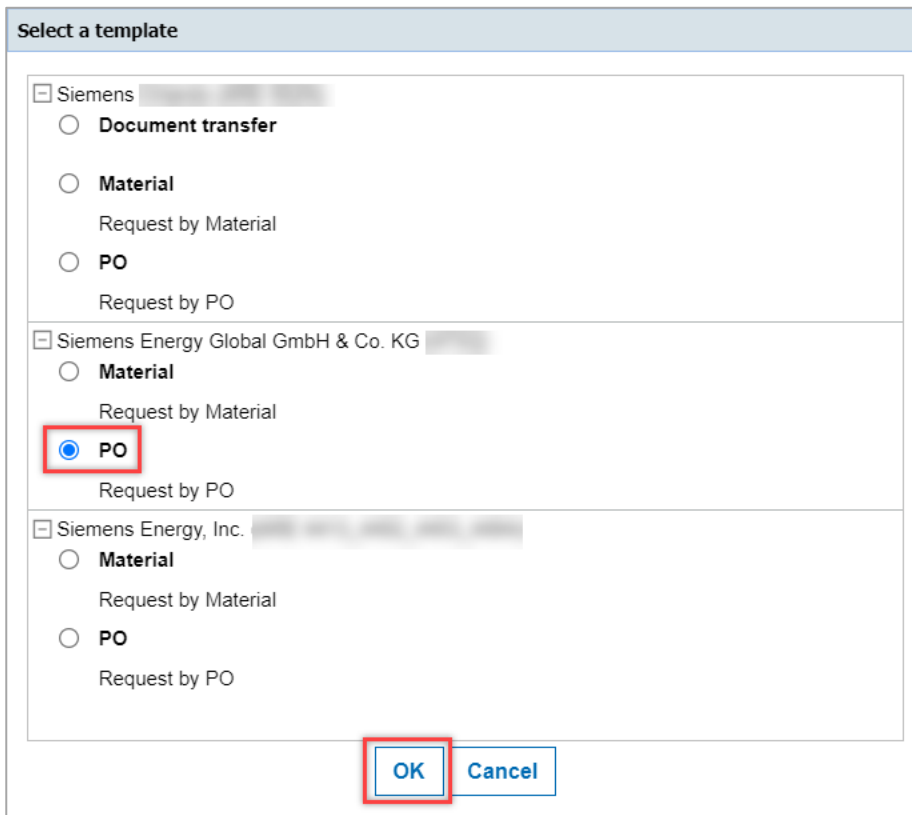


Figure: **Select a template** screen with activated radio button for PO

7 Roles and Rights

The SupplyOn Company Admin is authorized to create new users or to assign roles to already existing users.

For working with the Document Management, the following area of responsibility is needed: **Sales**.

Areas of responsibility			
<input type="checkbox"/>	Name ↑	Description	More information
<input type="checkbox"/>	Company Administration	Company master data, use...	More information
<input type="checkbox"/>	Order Fulfillment, Finance ...	Supply Chain Management.	More information
<input type="checkbox"/>	Quality Management	Supplier Quality Managem...	More information
<input checked="" type="checkbox"/>	Sales	Sourcing to Contract, Progr...	More information
<input type="checkbox"/>	Shipping, Goods Receipts, ...	Shipping, goods receipts, ...	More information
<input type="checkbox"/>	Supply Chain Administration	Demand, logistics and fina...	More information

Figure: **User Management** with **Edit User** and **Areas of responsibility**

After clicking **More information**, the following help page is displayed. Here you can see the tasks the user can fulfill with this responsibility.

Language

Sales

Sourcing, Auctions, Collaboration Folders **Document Management**

- Submitting quotes
- Editing attachments
- **Replying to documents**

Survey

- Answering surveys

Business Directory

- Editing company profile

Figure: **Help page** with explanation for the **Sales** responsibility