

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,

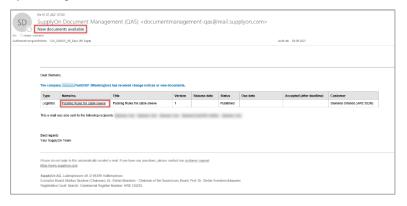


Figure: E-Mail notification on a new or changed document

Document Management displays the corresponding document details.

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

| ly SupplyOn > Document | Management:All documents > Packing Rules for cable sleeve | re (1): Document deta | ils | | | Help and support Print Message to support |
|---------------------------|---|-----------------------|----------------|--------|-------------------------------|---|
| Document | | | | | | |
| | | Send feedback | Cancel | More 🔻 | | |
| Document details | History and references | | | | | |
| Response attachmen | | | | | | Collapse 🚹 |
| Response from: Status: | SiemensTestUS01 Open Change | | | | | |
| Document details | | | | | | Collapse 🔳 |
| Type:* | Logistics | | Delivery date: | | Jun 30, 2021 12:38:05 PM | |
| Document name/number:* | Packing Rules for cable sleeve | | | | | |
| Version: | 1 | | Company: | | Siemens Orlando (ARE 552N) | |
| Status: | Published | | Contact: | | Schönemann, Christian (Buyer) | |
| Title: | Packing Rules for cable sleeve | | | | | |
| Description: | | | | | | |
| Material number: | | | | | | |
| Attachments: | Details Packing rules.docx (EN, 11 KB); | | | | | |
| Description Order Nu | mber | | | | | |
| Order Number*: | P0890123 | | | | | |
| | | Send feedback | Cancel | More 🔻 | | |

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.

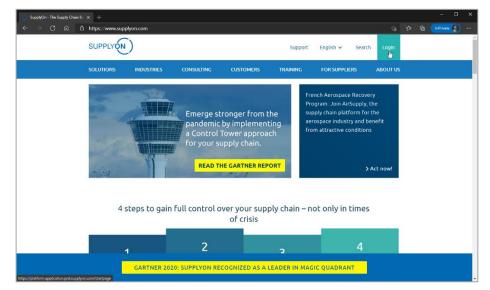


Figure: SupplyOn home page with Login button



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

4. Click the tile **Document Management**

| SUPPLYON My SupplyOn | SupplyOn Services ▼ Administrati | on ▼ News | | Log Out |
|-----------------------------|---|---|--|--|
| | SupplyOn > Home | | | C Last Refresh 0 Mins Ago |
| | | | | ^ |
| | Action Management \rightarrow | Business Directory \rightarrow | Collaboration Folders \rightarrow | • Are you using the best browser? |
| | Share action plans with your customers. | Find the master data of your company. | Work on development projects with your customers. | Please use Google Chrome, Mozills Frefox or Inforceoft Edge (Chrome-based versions ance January 2020) for highest speed and functionality. More |
| Home | | | | Congratulations - you have no urgent tasks |
| | Open | Open | Open | |
| Help & Support Feedback | Document → Management | Flexible Survey \rightarrow | Logistics & Finance \rightarrow | |
| | Receive and review important documents from your customers. | Er Find and edit surveys from your customers. | Access the demand and delivery processes including E-invoicing. | |
| | Open | Open | Open | |

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 <u>here</u>.

| Create docume | | | | | Sent documents | ibed All | Responded Subscri | Open/new |
|---------------------|------------------------------|---|--|--|---|---------------------|--------------------------------------|---------------------------------|
| | | | | | Reset search | Search | naterial number, process | Document details, m |
| | | | | | | | w | Hierarchical view |
| upplyOn default | able profiles: S | Т | | | | | | dvanced Search |
| Response status | Due date | Date of receipt Sort. | v Sent by v Release date | ▼ Status | ▼ Title | Version | 🗑 Name/no. | уре |
| Open | | 2/23/2021 10:32 AM CET | Siemens Beijing (ARE 5 | Published | DEMO DOCUMENT | 2 | TEST Siemens Beijing (ARE 5664) | Drawing |
| Accepted (after dea | 2/17/2021 11 | 2/16/2021 8:57 AM CET | Dresser-Rand Company | Published | Manufacturing Part Test | 1.1 | ManfPart 001 | Drawing |
| Accepted (after dea | 2/17/2021 11 | 2/16/2021 8:44 AM CET | Dresser-Rand Company | Published | Manufacturing Part Test | 1 | ManfPart 001 | Drawing |
| Open | | 11/27/2017 1:44 PM CET | Siemens Leipzig (ARE 4 | Published | String | 001 | test_02 | Drawing |
| Open | 3/22/2017 1: | 3/22/2017 12:56 PM CET | Siemens Orlando (ARE | Published | TEST document | а | TEST_xxx01 | General |
| Open | | 3/17/2017 11:48 AM CET | Siemens Orlando (ARE | Published | Test | 1 | Contract 1 | General |
| Open | | 3/7/2017 2:24 PM CET | Siemens Orlando (ARE | Published | Contract No. 123456 | A01 | 123456 | General |
| Open | | 3/7/2017 2:21 PM CET | Siemens Orlando (ARE | Published | Contract No. 123456 | co | 123456 | General |
| Open | 2/28/2017 11 | 2/22/2017 2:31 PM CET | Siemens Orlando (ARE | Published | Test email | 1 | \$5302 | Standard |
| No active business | 2/8/2017 11: | 2/7/2017 2:30 PM CET | Siemens Orlando (ARE | Published | Titile | 24 | Test 2 | General |
| No active business | 2/8/2017 11: | 2/7/2017 2:29 PM CET | Siemens Orlando (ARE | Published | Title | 23 | Test 2 | General |
| No active business | 11/30/2016 1 | 11/17/2016 2:34 PM CET | Siemens Energy Global | Published | Specification Drawing | 1.0 | 12 | Drawing |
| | 2/8/2017 11: 2/8/2017 11: | 3/7/2017 2:21 PM CET 2/22/2017 2:31 PM CET 2/7/2017 2:30 PM CET 2/7/2017 2:30 PM CET | Stemens Orlando (ARE Stemens Orlando (ARE Stemens Orlando (ARE Stemens Orlando (ARE | Published Published Published Published | Contract No. 123456 Test email Title Title | CO 1 24 23 | 123456 \$5302 Test 2 Test 2 | General General General General |

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.

| | cument Manager | | | | | | | | | | | | - |) and support F | Print Message to supp |
|----------------------|--------------------|---------|--------|-----------------|----------|------------|----------------------------|-----------------|----------|-------------------|-------------|--------|---------------------------|-------------------|-------------------------|
| o will find all doci | Responded | Subscri | | Sent document | | townload I | function. Click on a docur | ent name to dov | wnioad s | ingle attachments | directly in | the do | ocument details. | | Act as substitute |
| Document details, | material number, p | ocess | Search | Reset search | | | | | | | | | | | Create documen |
| Hierarchical vi | ew | | | | | | | | | | | | | | |
| dvanced Search | | | | | | | | | | | | | Та | ble profiles: | SupplyOn default |
| | is | ~ | | | . | | | | | | | | The Date of receipt Sort. | Due date | Response status |
| Response type: | 19 | | | | | | | | | Delete line | | | 2/23/2021 10:32 AM CET | | Open |
| Document type: | is | ~ | | | • | | | | | Delete line | | | 2/16/2021 8:57 AM CET | 2/17/2021 11 | Accepted (after dead |
| Release Date: | from/to | * | | | | to | | 2 | 9 | Delete line | | | 2/16/2021 8:44 AM CET | 2/17/2021 11 | Accepted (after dead |
| Response status: | is | ~ | | | • | | | | | Delete line | | | 11/27/2017 1:44 PM CET | | Open |
| Responded on: | from/to | * | | 3 | * | to | | ~ | | Delete line | | | 3/22/2017 12:56 PM CET | 3/22/2017 1: | Open |
| Document status: | is | ~ | | | • | | | | | Delete line | Ad | bb | 3/17/2017 11:48 AM CET | | Open |
| Search | Reset Search | 1 | | | | | | | | | | | 3/7/2017 2:24 PM CET | | Open |
| General | 123430 | _ | | Contract No. 1 | 00400 | | Fublished | | nemens | Onando (ARE | | | 3/7/2017 2:21 PM CET | | Open |
| Standard | \$5302 | | 1 | Test email | | | Published | s | Siemens | Orlando (ARE | | | 2/22/2017 2:31 PM CET | 2/28/2017 11 | Open |
| General | Test 2 | | 24 | Titile | | | Published | 5 | Siemens | Orlando (ARE | | | 2/7/2017 2:30 PM CET | 2/8/2017 11: | No active business r |
| General | Test 2 | | 23 | Titile | | | Published | s | Siemens | Orlando (ARE | | | 2/7/2017 2:29 PM CET | 2/8/2017 11: | No active business r |
| Drawing | 12 | | 1.0 | Specification E | rawing | | Published | 5 | Siemens | Energy Global | | | 11/17/2016 2:34 PM CET | 11/30/2016 1 | No active business r |
| Download | Generate repo | | | | | | | | | | | | | | |

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

| pen/new | Responded | Subsci | ribed All | Sent document | s | | | | | |
|------------------------------|-----------------------|---------|-----------|---------------|---|----|----------|---|-------------|--|
| ment detail | s, material number, j | process | Search | Reset search |] | | | | | |
| rchical | view | | | | | | | | | |
| advanced | search | | | | | | | | | |
| | | _ | | | | | | | | |
| sponse type: | is | * | | | • | | | | Delete line | |
| cument type: | is | * | | | • | | | | Delete line | |
| ease Date: | from/to | ~ | | | • | to | | | Delete line | |
| | is | ~ | | | • | | | | Delete line | |
| sponse status | | | | | | | | | | |
| sponse status sponded on: | from/to | * | | • | * | to | <u> </u> | ~ | Delete line | |

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.

| Choose search criteria | × |
|------------------------|---|
| | |
| Predefined fields | |
| Additional fields | |
| Purchase Order No. | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Apply Cancel | |

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

The new Search Criteria is added.

| Response type: | is | * | • | | | | Delete line | |
|---------------------|----------|---|---|----|---|---|-------------|-----|
| Document type: | is | * | • | | | | Delete line | |
| Release Date: | from/to | * | | to | | | Delete line | |
| Response status: | is | * | • | | | | Delete line | |
| Responded on: | from/to | * | ~ | to | • | * | Delete line | |
| Document status: | is | * | • | | | | Delete line | |
| Purchase Order No.: | contains | ~ | | | | | Delete line | Add |



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

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

| | Responde | d Subscrit | bed | All | S | ent documents | |
|------------------|-----------------|-------------|-----|---------|----|-------------------------|---|
| Document details | , material numb | er, process | S | earch | Re | eset search | |
| Hierarchical | view | | | | | | |
| lvanced Search | | | | | | | |
| pe | | no. | | Version | ▼ | Title | [|
| Drawing | | eijing | | 2 | | DEMO DOCUMENT | |
| Drawing | | | | 1.1 | | Manufacturing Part Test | |
| Drawing | | | | 1 | | Manufacturing Part Test | |
| Drawing | - | | | 001 | | String | |
| General | - | | | а | | TEST document | |
| General | _ | | | 1 | | Test | |
| General | | | | AO1 | | Contract No. 123456 | |
| General | | | | CO | | Contract No. 123456 | |
| Standar | d | _ | | 1 | | Test email | |
| General | | | | 24 | | Titile | |
| General | | | | 23 | | Titile | |
| Drawing | | | | 1.0 | | Specification Drawing | |

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.

| will fu | nd all docu | ments assigned to you here. | Download attach | ments as a ZIP file using the download fi | nction. Click on a document na | me to download single attachme | ints directly in the documen | t details. | | |
|---------|--------------|-----------------------------------|-----------------|---|--------------------------------|--------------------------------|------------------------------|-------------------------|--------------|---------------------|
| | /new | Responded Subsc | | Sent documents | | | | | | Act as substitute |
| Docum | ent details, | material number, process | Search | Reset search | | | | | | Create documer |
| | archical vi | ew | | | | | | | | |
| pe | ed Search | v Name/no. | Version | • Title | 🐨 Status | | Release date | | | Response status |
| | Drawing | TEST Siemens Beijin (ARE 5664) | 9 2 | DEMO DOCUMENT | Published | Siemens | | 2/23/2021 10:32 AM CET | | Open (SiemensTest |
| | Drawing | ManfPart 001 | 1.1 | Manufacturing Part Test | Published | Trans Text Trans | | 2/16/2021 8:57 AM CET | 2/17/2021 11 | Accepted (after dea |
| | Drawing | ManfPart 001 | 1 | Manufacturing Part Test | Published | from the local | | 2/16/2021 8:44 AM CET | 2/17/2021 11 | Accepted (after dea |
| | Drawing | test_02 | 001 | String | Published | Siemens | | 11/27/2017 1:44 PM CET | | Open (SiemensTes |
| | Logistics | 2345 | 1 | ret | Published | Siemens | | 5/18/2017 10:51 AM CEST | | Open (SiemensTes |
| | General | TEST_xxx01 | а | TEST document | Published | Siemens | | 3/22/2017 12:56 PM CET | 3/22/2017 1: | Open (SiemensTes |
| | General | Contract 1 | 1 | Test | Published | Siemens | | 3/17/2017 11:48 AM CET | | Open (SiemensTes |
| | General | 123456 | AO1 | Contract No. 123456 | Published | Siemens | | 3/7/2017 2:24 PM CET | | Open (SiemensTes |
| | General | 123456 | co | Contract No. 123456 | Published | Siemens | | 3/7/2017 2:21 PM CET | | Open (SiemensTes |
| | Standard | \$5302 | 1 | Test email | Published | Siemens | | 2/22/2017 2:31 PM CET | 2/28/2017 11 | Open (SiemensTes |
| | Drawing | Test-Doc | 1.0 | Test-Document | Published | Siemens | | 2/10/2017 10:48 AM CET | | Open (SiemensTes |
| | General | Test 2 | 24 | Titile | Published | Siemens | | 2/7/2017 2:30 PM CET | 2/8/2017 11: | No active business |
| | General | Test 2 | 23 | Titile | Published | Siemens | | 2/7/2017 2:29 PM CET | 2/8/2017 11: | No active business |
| | Drawing | 12 | 1.0 | Specification Drawing | Published | Siemens | | 11/17/2016 2:34 PM CET | 11/30/2016 1 | No active business |

Figure: Document Management with the active tab Open/new

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

| My SupplyOn > Document | Management:Open/new documents > Test-Doc (1.0): Document details | | | | Help and support Print Message to sup |
|---------------------------|--|---------------|----------------|--------------------------|---|
| Document | | | | | |
| | | Send feedback | Cancel More | , | |
| Document details | History and references | | | | |
| Response attachment | t | | | | Collapse |
| Response from: Status: | Siemern TestUS01 Open Change | | | | |
| Document details | | | | | Collapse |
| Type:* | Drawing | | Delivery date: | Feb 10, 2017 10:48:30 AM | |
| Document name/number:* | Test-Doc | | | | |
| Version: | 1.0 | | Company: | Street State (St. 1997) | |
| Status | Published | | Contact | Trappetty Trapp | |
| Title: | Test-Document | | | | |
| Description: | Test Description | | | | |
| Material number: | | | | | |
| Attachments: | Details attachment1.pdf (11 KB); | | | | |
| Description Order Nut | mber | | | | |
| Order Number*: | 452222 | | | | |
| | | Send feedback | Cancel More | , | |

Figure: Document Details with Attachment

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



3. by clicking Change.

| My SupplyOn > Document | Management:Open/new documents > Test-Doc (1.0): Document details | | | | | Help and support Print Messa | ige to s | upport |
|---------------------------|--|---------------|---------------|--------|--------------------------|----------------------------------|----------|--------|
| Document | | | | | | | | |
| | | Send feedback | Cancel | More 🔻 | | | | |
| Document details | History and references | | | | | | | |
| Response attachment | t i i i i i i i i i i i i i i i i i i i | | | | | c | Collapse | Ť |
| Response from: Status: | SiemensTestUS01 Open Change | | | | | | | |
| Document details | | | | | | c | Collapse | Ť |
| Type:* | Drawing | | Delivery date | | Feb 10, 2017 10:48:30 AM | | | |
| Document name/number:* | Test-Doc | | | | | | | |
| Version: | 1.0 | | Company: | | Second Track (MC 1998) | | | |
| Status: | Published | | Contact: | | Trappetty Trapp | | | |
| Title: | Test-Document | | | | | | | |
| Description: | Test Description | | | | | | | |
| Material number: | | | | | | | | |
| Attachments: | Details | | | | | | | |
| | attachment1.pdf (11 KB); | | | | | | | |
| Description Order Nu | mber | | | | | | | |
| Order Number*: | 452222 | | | | | | | |
| | | Send feedback | Cancel | More 🔻 | | | | |

Figure: Document Details with button Change

4. Select Accept (or Decline) the document.

| My SupplyOn > Document | t Management:Open/new documents; > Test-Doc (1.0): Document details |
|------------------------|---|
| Document | |
| | Send feedback Cancel More |
| Document details | History and references |
| Response attachmen | ıt |
| Response from: | SiemensTestUS01 |
| Status: | Open Accepted |
| | Decline |

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.

| My SupplyOn > Docume | t Management:Open/new documents > Test-Doc (1.0): Document details | | | | Help and support Print Message to su | pport |
|---------------------------|--|---------------|----------------|----------------------------|--|-------|
| Document | | | _ | | | |
| | | Send feedback | Cancel More 🔻 | | | |
| Document detail | History and references | | | | | |
| Response attachme | ıt | | | | Collapse | Ŧ |
| Response from: | SiemensTestUS01 | | | | | |
| Status: | Accepted Change | | | | | |
| Document details | | | | | Collapse | Ŧ |
| Type:* | Drawing | | Delivery date: | Feb 10, 2017 10:48:30 AM | | |
| Document name/number:* | Test-Doc | | | | | |
| Version: | 1.0 | | Company: | Siemens Orlando (ARE 552N) | | |
| Status: | Published | | Contact: | Düspohl, Sonja | | |
| Title: | Test-Document | | | | | |
| Description: | Test Description | | | | | |
| Material number: | | | | | | |
| Attachments: | Details | | | | | |
| | attachment1.pdf (11 KB); | | | | | |
| Description Order N | umber . | | | | | |
| Order Number*: | 452222 | | | | | |
| | | [- · · · | | | | |
| | | Send feedback | Cancel More * | | | |

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.

| vly SupplyOn > Docum | ent Management:Responded o | locuments | | | | Help and support | Print Message to support |
|------------------------|---|-----------|---|--------------------------------|--|------------------------|----------------------------|
| | ts assigned to you here. Downlo sponded Subscribed | | s a ZIP file using the download function. Cl documents | ick on a document name to down | oad single attachments directly in the document details. | | Act as substitute |
| Document details, mate | rial number, process | arch Rese | tsearch | | | | Create document |
| Advanced Search | | | | | | Table profiles: | SupplyOn default |
| Type [| Name/no. | Version 🗄 | Title | | 👻 Sent by 🖙 Release date | Date of receipt Sort. | Response status |
| General | Contract due to error 1 | 0003 | Test for refusal | Published | Siemens Orlando (ARE 55 | 3/1/2017 8:09 AM CET | Declined |
| General | Contract due to error | 0001 | Test with doc for acceptance | Published | Siemens Orlando (ARE 55 | 3/1/2017 8:07 AM CET | Accepted |
| General | Contract | 0001 | Test just for fun | Published | Siemens Orlando (ARE 55 | 2/28/2017 1:07 PM CET | Accepted |
| Drawing | Test-Doc | 1.0 | Test-Document | Published | Siemens Orlando (ARE 55 | 2/10/2017 10:48 AM CET | Accepted |
| | nerate report | | | | | | |
| Download Ge | | | | | | | |

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.

| | Mi 30.06.2021 | 1 14:06 |
|---------|---------------------|---|
| SD | Supply | On Document Management (QAS) <documentmanagement-qas@mail.supplyon.com></documentmanagement-qas@mail.supplyon.com> |
| | | rse to change notice / document |
| An Oden | no-scenario | se o enange notice / document |
| | | DELETE 90 Days (90 Tage) Läuft ab 28.09.2021 |
| | - | |
| | | |
| | | SUPPLYON |
| | Dear Siemens, | |
| | The company | TestUS01 (Washington) has not yet responded to the following change notice / document. For enquiries contact your customer contact. |
| | Type: | Quality |
| | Name/no.: | Review of measurements |
| | Version: | 1 |
| | Title: | Review of measurements for cable sleeve |
| | Release date: | |
| | Delivery date: | 6/30/2021 2:05 PM CEST |
| | Status: | Published |
| | Due date | 6/30/2021 11:59 PM CEST |
| | Customer | |
| | Note: This docume | ant will be automatically accepted after the deadline 7/2/2021 2:05 PM CEST. |
| | Link to document | |
| | This e-mail was als | so sent to the following recipients |
| | | |
| | Best regards | |
| | Your SupplyOn Te | |

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

| Document | Dn Document Management (QAS) < was accepted after deadline | documentmanagement-qas@ | mail.supplyon.com> |
|--|--|---|--------------------|
| ⊃ demo-scenario wahrungsrichtlinie TAG_ | DELETE_90_Days (90 Tage) | Läuft ab 02.10.2021 | |
| | | | SUPPLY (N) |
| Dear Siemens, | cument was accepted automatically by the system after de | adline | |
| Type Name/no. Version Release date Delivery date: Status: | Quality Measurements 001 7/2/2021 8:57 AM CEST Published | | |
| Customer This e-mail was als | Siemens | | |
| Best regards Your SupplyOn Te | am | | |
| Please do not reply | y to this automatically created e-mail. If you have any question: on.com | s, please contact our <u>customer support</u> . | |
| SupplyOn AG, Lu | dwigstrasse 49, D-85399 Hallbergmoos | | |

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)**.

| SupplyOn > Docume | ent Management:All documents > Mea | surements (001): Document details | | | | Help and support Print Message to sup |
|---------------------------|------------------------------------|-----------------------------------|------|--------------------|-------------------------------|---|
| ocument | | | | | | |
| | | | Back | More 🔻 | | |
| Document detai | Is History and references | | | | | |
| Response attachme | ent | | | | | Collapse |
| Response from: | SiemensTestUS01 | | | | | |
| Status: | Accepted (after deadline) | | | Release date: | 7/2/2021 11:59:00 PM CEST | |
| | | | | | | |
| Document details | | | | | | Collapse |
| Type:* | Quality | | | Delivery date: | Jul 2, 2021 8:57:26 AM | |
| Document name/number:* | Measurements | | | Auto-Acceptance da | ate: | |
| Version: | 001 | | | Company: | Siemens Orlando (ARE 552N) | |
| Status: | Published | | | Contact: | Schönemann, Christian (Buyer) | |
| Title: | Review of measurements | | | | | |
| Description: | Review of measurements for cap | | | | | |
| | | | | | | |
| Material number: | - | | | | | |
| Attachments: | Details | | | | | |
| | No attachments were uploaded. | | | | | |
| Description Order I | Number | | | | | |
| Order Number*: | 890123 | | | | | |
| | | | | - | | |
| | | | Back | More 🔻 | | |

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.

| ty SupplyOn > Docu | ument Management:All documer | nts | | | | | | Θ | Help and supp | oort Print Message to su | pport |
|--|--|---------|---|------------------------|-------------------------------|-----------------|---------------------|-----------------------------------|---|---|-------|
| | nents assigned to you here. Down Responded Subscribed | _ | ents as a ZIP file using the download function. Click Sent documents | on a document name t | o download single attachments | directly in the | e document details. | | | Act as substitu | ute |
| Document details, material number, process Search Reset search Create document | | | | | | | | | | | nent |
| Advanced Search | | | | | | | | | Table profiles | S: SupplyOn default | ~ |
| | 💌 Name/no. | Version | Title | | Sent by | ¥ R | elease date | Date of re | | SupplyOn default | |
| | 💌 Name/no. 🖸 | Version | 🔄 Title | Status Published | Sent by | ▼ R | elease date | _ | | ort. 🐨 Response status | |
| уре | v Name/no. | Version | Title Review of measurements | _ | Sent by Siemens | ₹ R | elease date | 7/2/2021 | eceipt s | rort. 🐨 Response status | |
| ype | | - | | Published | | F R | elease date | 7/2/2021 | eceipt sa 9:23 PM CEST | Response status T Open Accepted (after des | adli |
| Type Standard Quality | Measurements | - | Review of measurements | Published Published | Siemens | . R | elease date | 7/2/2021 7/2/2021 6/30/2021 | eceipt Sa 9:23 PM CEST 8:57 AM CEST | Image: | adli |

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.

| Mi 30.06.2021 12:45 |
|---|
| D SupplyOn Document Management (QAS) <documentmanagement-qas@mail.supplyon.com></documentmanagement-qas@mail.supplyon.com> |
| |
| New document available |
|) demo-scenario |
| wahrungsrichtlinie TAG_DELETE_90_Days (90 Tage) Läuft ab 28.09.2021 |
| |
| |
| SUPPLYON |
| Softeren |
| |
| Des Disease |
| Dear Siemens, |
| Your company TestUS01 (Washington) has received a new document. Please respond. |
| Your company sTestUS01 (Washington) has received a new document. Please respond. |
| Type Drawing |
| Name/no. Technical Drawing |
| Version 1.3 |
| Title Technical Drawing for cable sleeve V3 |
| Release date |
| Status Published |
| Due date: 7/6/2021 1:00 PM CEST |
| Customer Siemens Orlando (ARE 552N) |
| |
| Link to document |
| |
| This e-mail was also sent to the following recipients: |
| |
| |
| |
| Best regards |
| Your SupplyOn Team |
| |
| |
| |
| Please do not reply to this automatically created e-mail. If you have any questions, please contact our <u>customer support</u> . |

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.

| SupplyOn > Document | Management/All documents > Technical Drawing (1.3): Document details | | | Help and support Print Message to | o supp | pert |
|---------------------------|--|----------------|-------------------------------|---------------------------------------|--------|------|
| Document | | | | | | |
| | | Cancel Nore | • | | | |
| Document details | History and references | | | | | |
| Response atlachmen | 4 | | | Colapse | | t |
| Response from: | Siemens TestUS01 | | | | | |
| Status: | Open Change | Reinane date: | 7/6/2021 1.00.00 PM CEST | | | |
| Document details | | | | Colapos | | B |
| Type:* | Drawing | Delivery date: | Jun 30, 2021 12:44:56 PM | | | |
| Document name/namber.* | Technical Drawing | | | | | |
| Version: | 13 | Company: | Siemens Orlando (ARE 552N) | | | |
| Status | Published | Contact | Schönemann, Christian (Euyer) | | | |
| Title: | Technical Drawing for cable sleeve V3 | | | | | |
| Description: | New Version of Drawing and | | | | | |
| | | | | | | |
| Material number: | | | | | | |
| Attachments: | Detalis | | | | | |
| | Process FMEA Optimization.dock (11 KB); | | | | | |
| Descalation Order Nu | mber | | | | | |
| Order Number*: | Po890123 | | | | | |

Figure: Document Management: All documents

| ocument | | | | | | | |
|-------------------------------|---|-----------|--|-------------------------|----------|-----------------|--|
| ocument | | | | | | | |
| | | | | feedback Cancel | Nore 🔻 | | |
| | | | | | | | |
| | | | | | | | |
| Document details | History and referen | ces | | | | | |
| ersions of this docu | | | | | | | |
| Type | Name/no. | F Version | Sert. V Title | F Status | | Response status | |
| | 1.1 | 1 | Drawing for cable sleeve | Historical | 60 ····· | Open | |
| Ormaina | | | | | | | |
| Drawing | Technical Drawing Technical Drawing | 12 | Technical Drawing for cable sleave V2 | Historical | | | |
| Drawing Drawing Drawing | Technical Drawing Technical Drawing Technical Drawing | 1.2 | Technical Drawing for cable sleeve V2 Technical Drawing for cable sleeve V3 | Historical Published | | Open Open | |

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.

| SUPPLYON My SupplyOn Su | ıpplyOn Services ▼ Administrati | on v News | | trg-SEC Tools Ltd. (DEMO COMPANY) - Nash Julia Log Out |
|--|---|---|---|---|
| | SupplyOn > Home | | | C Last Refresh 0 Mins Ago |
| 18). | Action Management \rightarrow | AirSupply Logistics \rightarrow | Business Directory \rightarrow | • Are you using the best browser? |
| Julia Nash Irg-SEC Tools Ltd. (DEMO COMPANY) | Share action plans with your customers. | Access the demand and delivery processes including E-Invoicing, concession and notification of escape for the aerosnace industry. | Find the master data of your company. | Please use Google Chrome, Modifie Florktor of Microsoft Edge (Chromo-Maed) 2020 (or highest speed and functionally, More Congratulations - you have no urgent tasks |
| Help & Support Feedback | Collaboration Folders → | Document Management → | Flexible Survey → E Find and edit surveys from your customers. | |
| | Open | documents from your customers. | Open | |
| < | Logistics & Finance → | Performance Monitor → | Problem Solver → 0 2 Actions due whine 30 days 4002 New actions | |

Figure: Home screen with tiles per application and actual notifications

2. Within the Dashboard open the Orders.

| SUPPLYON My Sup | oplyOn s | SupplyOn Services 🔻 Administ | ration ▼ News | | trg-SEC Tools Ltd. (DEMO | COMPANY) - Nash Julia Log Out |
|--|----------|---|--|--|--------------------------------|----------------------------------|
| | | SupplyOn > Logistics & Finance > D | ashboard | | C Last Refresh 0 Mins Ago | Alerts |
| Logistics & Finance | | Search Select Process | | iearch e.g. for Order No., Material No., | | ٩ |
| Dashboard | | Orders | Delivery Instructions | ightarrow Delivery Forecasts | ightarrow JIT Call-Offs | \rightarrow |
| Demand • Planning Delivery | ~ | 8 Total New Orders & Updates Order Status | O Current new Delivery Instructions | O Current new Delivery Forecasts | O Current new JIT Call-Offs | |
| Monitoring | ~ | New Orders 6 Order Updates 2 | | | | |
| Interactive Tour Help & Support Feedback | | | | | | |

Figure: Dashboard / tile / Orders



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

| | | | | | Add line De | tate the s | | | | My Search Profiles | Thue Sea | arch Are |
|---|--------------|--|----------------------------------|--|------------------------|----------------------|-----------|----------------------|--|---------------------|-------------------------------|--------------|
| 0 | der Type | | not equal to | Scheduling Agreemen | t Y Add line De | nete line | | | | My Search Promes | ✓ Manao | o View |
| S | earch | Reset | | | | | | | | | - Manag | 0 100 |
| G | ouped b | y Unloading Point | Grouped by Material Nu | Imber Orders | | | | | | | Order Line Items | s Over |
| [| Default Vi | ew | ✓ Manage View • | | | | | | | | Rese | et all Filte |
| 3 | Org. Bu | Plant Customer | Plant Code Planner | Consignee, Name | Unloading Point | Order Number | Positions | Order Date | Last Change D Status | History Attachments | Respond-by | Confi |
| | 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 | |
| | 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 | |
| | BFAG | B. Fischer Italia B. Fischer Italia | IT01 | B. Fischer Italia S.p.A B. Fischer Italia S.p.A | Porta 1.4 Porta 1.4 | 55101468 55101467 | 1 | 17/05/21 | 18/05/21 09:47 new 18/05/21 09:47 new | | 23/05/21 18:00 23/05/21 18:00 | |
| | BFAG BFAG | B. Fischer Italia B. Fischer Italia | 1101 | B. Fischer Italia S.p.A 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 | |
| - | BEAG | 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 | |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101464 | 1 | 09/05/21 | 10/05/21 17:59 new | | 15/05/21 18:00 | No |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101463 | 1 | 09/05/21 | 10/05/21 17:59 new | | 15/05/21 18:00 | No |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | Tor Nord 2 | 55101460 | 1 | 09/05/21 | 10/05/21 17:59 new | ¥ | 15/05/21 18:00 | No |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | Tor Nord 2 | 55101459 | 1 | 09/05/21 | 10/05/21 17:59 new | ¥ | 15/05/21 18:00 | No |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | Tor Nord 2 | 55101458 | 1 | 04/05/21 | 05/05/21 08:32 read | ¥ | 10/05/21 18:00 | No |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | Tor Nord 2 | 55101462 | 1 | 03/05/21 | 04/05/21 08:40 read | | 09/05/21 18:00 | Yes |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | | 55101461 | 1 | 03/05/21 | 04/05/21 08:40 read | | 09/05/21 18:00 | |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | | 55101457 | 1 | 03/05/21 | 04/05/21 08:40 read | | 09/05/21 18:00 | |
| | BFAG | B. Fischer DE B. Fischer DE | DE01 DE01 | B. Fischer AG Deutschland B. Fischer AG Deutschland | | 55101456 55101455 | 1 | 03/05/21 03/05/21 | 04/05/21 08:39 read 04/05/21 08:39 read | | 09/05/21 18:00 | |
| | BFAG BFAG | B. Fischer DE B. Fischer DE | DE01 | B. Fischer AG Deutschland B. Fischer AG Deutschland | | 55101455 | 1 | 03/05/21 | 04/05/21 08:39 read 04/05/21 08:39 read | | 09/05/21 18:00 | No Yes |
| | BFAG | B. Fischer DE B. Fischer DE | DE01 | B. Fischer AG Deutschland B. Fischer AG Deutschland | | 55101453 | 1 | 03/05/21 | 04/05/21 08:39 new | | 09/05/21 18:00 | No |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101452 | 2 | 03/05/21 | 04/05/21 08:38 read | | 09/05/21 18:00 | Yes |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101451 | 2 | 03/05/21 | 04/05/21 08:38 read | | 09/05/21 18:00 | |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101450 | 1 | 22/04/21 | 23/04/21 08:42 read | | 28/04/21 18:00 | No |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101449 | 1 | 22/04/21 | 23/04/21 08:42 read | | 28/04/21 18:00 | Yes |
| 1 | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101445 | 1 | 20/04/21 | 21/04/21 09:29 read | ¥ | 26/04/21 18:00 | Yes |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101448 | 1 | 19/04/21 | 20/04/21 13:24 read | | 25/04/21 18:00 | Yes |
| | BFAG | B. Fischer Italia | IT01 | B. Fischer Italia S.p.A | Porta 1.4 | 55101447 | 1 | 19/04/21 | 20/04/21 13:24 read | | 25/04/21 18:00 | Yes |
| | BFAG | B. Fischer DE | DE01 | B. Fischer AG Deutschland | Tor Nord 2 | 65101356 | 1 | 05/04/21 | 06/04/21 15:49 read | | 11/04/21 18:00 | Yes |

Figure: Orders / Overview

The order details screen is opened.

4. With a click on the Link,

| My Sup | plyOn ≻ Logistics 8 | Finance > Order | s > Order de | tails | | | | | | | | | | | | Contact | Help for this p | page Print |
|--------|------------------------------------|------------------|----------------------------|---------------|--|-----------------|----------------------|--------------|------------------------|-------------|----------------|-------------------------|------------|----------|------------|-------------|-----------------|--------------|
| Orde | r: 55101465 - (| Customer: trg- | B. Fischer | AG (DEMO | COMPANY), Cu | stomer | Plant Code: IT | F01 | | | | | | | | ✓View | Buyers Order | Changes |
| | ine items | Header De | tails | Parties | | | | | | | | | | | | | | |
| | | | | | | | | | | | 1 | 1 | 1 | 1- | 1 | 1 | | |
| 10 | Material N 345828 | | Material Des O-Ring Sea | | Unloading Point Porta 1.4 | | t value 95.20 EUR | | Delivery Date 06/21 | UoM | Qty. 496 | Respond-b 15/05/21 1 | Response . | no respo | Open | Responded t | by Invoice Stat | us |
| | | | | | Pona 1.4 | J | 95.20 EUK | 15 | 00/21 | EN | 450 | 10/00/21 1 | | no respo | | | | |
| | 10: 345828 - O-Ri | ng Sealing (sili | | r) | | - | | | 120.00 | | | | | | | | | |
| | nge Level: | | 01/10 O-Ring 3 | 45020 | | | per price unit: | | 120.00 | | | | | | | | | Î |
| | olier Material Num ading Point: | iber: | Porta 1.4 | | | Net Vi Price | | | 100 | EUR | | | | | | | | |
| | ading Point: red Quantity: | | 496 EA | • | | | Unit: :hande: | | 08/05/2 | 4 | | | | | | | | - 1 |
| | , | | 450 EA | | | Lasi u | mange. | | 00/00/2 | · | | | | | | | | |
| | e Item Details | | | | | | | | | | | | | | | | | |
| | rehouse: | | place 1 | | | | | | | act Numbe | n - | | 00001 | | | | | |
| | ce of Consumptio | n: | Regal 2 | | | | | | VAT: | | | 19.0 | | | | | | _ |
| Pro | duct information: | | polyme | r (such as po | ly made from a flat m lychlorotrifluoroethyl gasket applications i | ene).One | of the more dea | sirable prop | | | | | | | | | | |
| Link | KS: | | https://p | platform.appl | ication.prd.supplyon. | com/dms | /faces/index.jsf? | crtdmsedi1 | =txt;dv;leadingE | old;like;52 | 0100903 | | | | | | | |
| Sch | edule Lines | | | | | | | | | | | | | | | | | |
| | | Buyer Ir | nformation | | | | | | | s | upplier Inform | mation | | | | | | |
| Cor | nmit | | Requ. Del | | Requ | Qty. | Cum. Dev. | PSID | De | I. Date | Del. | Qty. | Comment | | Last Resp. | | | - 11 |
| Fix | | | 15/06/21 | | | 496 | 0 | | | | | 4 | 96 | | | Split Deli | ivery | |
| Tota | al planned | | | | | 496 | | | | | | 4 | 196 | | | | | |
| Tota | al shipped | | | | | | | | | | | | 0 | | | | | |
| Tota | al pending ASN qi | uantity | | | | | | | | | | | 0 | | | | | - 1 |
| Sup | plier Response | | | | | | | | | | | | | | | | | |
| 0 | No Response | | | Supplier F | Reference: | | | | | | | | | | | | | |
| 0 | Confirm as-is | | | Supplier M | faterial Number: | | -Ring 345828 | | | | | | | | | | | |
| ملا | Rocoord with ch | 2000 | | Supplier M | Anterial Description | | | | | | | | | | | | | - |
| Back | Set all to - | Apply supp | lier referen | ice Save | & Send Create | | Create FPA | VASN P | rint - Dowr | load - | | | | | | Page 1 c | of 1 Next | |

Figure: Order 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 <u>chapters 2</u> and $\underline{3}$.



| SUPPLYON My SupplyOn SupplyOn Services - | Administration v News | trg-SEC Tools Ltd | I. (DEMO COMPANY) - Nash Julia Log Out |
|--|------------------------------|--|---|
| My SupplyOn > Document Management.All documents Open/new Responded Subscribed All Sent documen | ts | Help and su | pport Print Message to support Act as substitute |
| Document details, material number, process Search Reset search Hierarchical view |] | | Create document |
| Advanced Search | | Table prof | iles: All Docs 👻 |
| Type 👻 Name/no. 🐨 Version 🐨 Title | 👻 Status 💌 | Sent by 👻 Release date 👻 Date of receipt | Sort. 👻 Response status 🛛 👻 |
| Drawing 890128 Casing 1.1 Cylindrical C Download Generate report | asing 890128 Published | trg-B. Fischer AG (DEM 17/06/2016 17/06/2016 13:15 (| CEST - |
| 1 Document Select all Deselect all | Rows per page 20 👻 | First | Previous Page 1 of 1 Next Last |

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.

| - Sier | nens Orlando (ARE 552N) |
|--------|---|
| 0 | Document transfer |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| - Sier | nens Energy Global GmbH & Co. KG (473Q) |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| - Sier | nens Energy, Inc. (ARE 4413_4452_4453_4494) |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| | OK Cancel |

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**.

| select a | template |
|----------|---|
| Sier | nens Orlando (ARE 552N) |
| 0 | Document transfer |
| | Material |
| - | Request by Material |
| 0 | PO |
| | Request by PO |
| - Sier | nens Energy Global GmbH & Co. KG (473Q) |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| ⊡ Sier | nens Energy, Inc. (ARE 4413_4452_4453_4494) Material |
| 0 | Request by Material |
| | PO |
| | Request by PO |
| | request by Fo |
| | OK Cancel |

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.

| My SupplyOn > Docume | t Management:Open/new documents > Document Request Details | | Help and support Print Message to support |
|----------------------|--|--|---|
| Document | | | |
| | | Send Send & create document Save as draft Cancel | |
| Document detail | History and references | | |
| Document Details | | | Collapse 🚹 |
| Document no.*: | Test Request | Status: Draft | |
| Contact: | Siemens, Test | Running number*: | |
| Customer: | Siemens Orlando (ARE 552N) | | |
| Title: | Test Request | | |
| Description: | Test Request | | |
| | | | |
| Material Number*: | 890123 | | |
| Language: | | | |
| Altern, E-Mail: | | | |
| | | | |
| | | Send Send & create document Save as draft Cancel | |

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 <u>chapter 2</u> or by click on the appropriate link under **Referenced files** once available. Or process the document as described in <u>chapter 3</u> (dependent on the agreement with your customer).

| a rou nave put | plished the document. | | | | | | | |
|----------------|------------------------------|-----------------------|------------------|-----------------------|--------------------|---------------------------|-------------------------------|--|
| Open/new | Responded Subscribed | All Sent documents | | | | | | Act as substi |
| Name, title | S | earch Reset search | | | | | | Create docur |
| | | | | | | | | |
| | | | | | | | Table profiles: | SupplyOn default |
| emplate | 🐨 Name/no. | | ☑ Status | ▼ Sent by | Referenced files | T Date | | SupplyOn default |
| emplate | ☑ Name/no. Test Request ▼ | Title Test Request | Status Published | Sent by Siemens, Test | | Date 5/31/2021 1:44 F | Sort. 💌 | |
| | | | | | E Referenced files | | Sort. 👻 PM CEST | Customer company |
| Material | Test Request 🔻 | Test Request | Published | Siemens, Test | Referenced files | 5/31/2021 1:44 F | Sort. 🗹 PM CEST PM CEST | Customer company Siemens Orlando (ARE |

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 <u>here</u>. Just select the PO as a reference instead of material.

| Select a | template |
|----------|--|
| 🗆 Sier | mens |
| 0 | Document transfer |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| ⊡ Sier | mens Energy Global GmbH & Co. KG Material |
| ۲ | Request by Material PO |
| | Request by PO |
| 🖃 Sier | mens Energy, Inc. |
| 0 | Material |
| | Request by Material |
| 0 | PO |
| | Request by PO |
| | OK Cancel |

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.**

| Are | eas of responsibilit | Ŋ | |
|-----|-----------------------------|-----------------------------|------------------|
| | Name 🛧 | Description | More information |
| | Company Administration | Company master data, use | More information |
| | Order Fulfillment, Finance | Supply Chain Management. | More information |
| | Quality Management | Supplier Quality Managem | More information |
| | Sales | Sourcing to Contract, Progr | More information |
| | Shipping, Goods Receipts, | Shipping, goods receipts, | More information |
| | 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.

| anguage English 🗸 |
|--|
| Sales |
| ourcing, Auctions, Collaboration Folders Document Management |
| Submitting quotes |
| Editing attachments |
| Replying to documents |
| urvey |
| Answering surveys |
| Business Directory |
| Editing company profile |

Figure: Help page with explanation for the Sales responsibility

r