

## SIEMENS – Supplier Training Documentation

SupplyOn DMS Pull on request



01/2018  
Version 2.0

## **SupplyOn Services DMS-PO-Integration (PULL variant) – Benefits**

# Benefits of SupplyOn Document Management (DMS) for suppliers



**The advantage for you of exchanging documents electronically:  
Access at all times to up-to-date documents**



- ➔ With SupplyOn Document Management you always work on the basis of up-to-date documents from your customers.
- ➔ Sending out documents manually is prone to errors. Only the electronic process ensures that you are immediately informed about document changes.
- ➔ Document Management enables you to efficiently manage the documents of your customers. You can save the electronic documents directly in your internal system without having to carry out tedious scanning. The documents of your customer are always up-to-date. This means there is no need for lots of consultation with your customer.
- ➔ Comprehensive search and filter functions enable you to find documents in next to no time.



"SupplyOn Document Management has generated substantial gains in efficiency for ourselves and for our customers."

# Both Siemens and the suppliers benefit from maximum security for business-critical data



**Communication via e-mail and fax is not secure.  
Use the secure line of communication – SupplyOn!**



- ➔ All SupplyOn customers place the highest value on security. Therefore, many customers put SupplyOn to the acid test with regards to data security in regularly occurring security audits.
- ➔ All SupplyOn services are based on a comprehensive and tried-and-tested security and operating concept.
- ➔ SupplyOn meets the demanding requirements of the German Data Protection Act (BDSG) as well as the ISO 27001 security standard.



## SupplyOn Services DMS Pull-on-Request – Process Description

# SupplyOn Services/ DMS – Process Description

## Pull-on-Request Process

- The user logs on to SupplyOn
- The user selects the service “Document Management”
- The user creates a document request
- The request will be forwarded to Siemens AG
- The user receives an E-Mail-Alert that the request has been successfully delivered to Siemens AG
- Siemens AG sends the requested document to the SupplyOn Platform
- The user receives an E-Mail-Alert that the requested document is uploaded in SupplyOn
- The user logs on to SupplyOn
- The user downloads the document

# SupplyOn Services/ DMS – Process Description

## Pull-on-Request Preconditions

- To request a document, the needed information is either available in Supplier can find information to request in either a WebEDI message or any other media
- Supplier fills out all mandatory fields and sends the request to the buyer
- There is no automatic transfer of purchase order numbers or other information into suppliers request
- Siemens AG checks whether the request is valid and whether the requester is allowed to get the requested documents
- SupplyOn will not make any validation except SupplyOn standard portal login and access validation
- Siemens AG receives one XML for each request
- Siemens AG receives different types of documents for each request process (PO related request/ Material number related request)
- Siemens AG sends all requested and valid documents to the supplier using the PUSH process
- Siemens AG sends one XML for each document
- Siemens AG sends the BusinessContextID of the request with each document to make SupplyOn be able to match the requested and incoming documents

# SupplyOn Services/ DMS – Process Description

## Pull-on-Request Prerequisites

The screenshot shows the SupplyOn web application interface. At the top, there is a navigation bar with links: 'My SupplyOn', 'SupplyOn Services', 'Administration', and 'Log Out'. The 'Administration' link is highlighted, and a dropdown menu is visible with options: 'My User Account', 'My Substitutes', 'Customer Responsible', 'Company', and 'Contract & Invoice'. The 'My User Account' option is selected, leading to a settings page. The page title is 'TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp., Sonja'. Below the title, there are tabs for 'My master data', 'My roles', and 'My service settings'. The 'My service settings' tab is active, showing 'Customer responsible settings for corporate customer'. On the right, there are links for 'Help and support', 'Print', and 'Message to support'. Below the tabs, there is a section for 'Sourcing' and 'Document Management'. A text block explains that customer responsables with write access are informed about new requests. Below this, there is a table with columns: 'Company', 'Responsible for customer', and 'Authorization'. The table contains one row for 'trg-CAL Tech Corp.' with 'All customers' as the responsible and 'Write' as the authorization. At the bottom, there is a summary row showing '1 Customer responsible', 'Rows per page 10', and pagination links 'First Previous | Page 1 of 1 | Next Last'.

My SupplyOn > My user: Service settings

My master data | My roles | My service settings

Customer responsible settings for corporate customer

Company: trg-CAL Tech Corp., Phoenix

Sourcing | Document Management

Customer responsables with write access are informed about new requests of their customers in SupplyOn Sourcing and are able to process the requests. A comprehensive overview of all customer responsables is available in the Business Directory tab "Contact Persons".

Who administrates the customer responsables?

Company	Responsible for customer	Authorization
trg-CAL Tech Corp.	All customers	Write

1 Customer responsible

Rows per page 10

First Previous | Page 1 of 1 | Next Last

- To create a request, the supplier user must be a KAM (Key Account Manager) user with „write“ rights
- To view any of the created requests the supplier user must be a KAM (Key Account Manager) user with „read“ rights
- To check if the user has these rights, the supplier user needs to click on “Administration – My User Account” and needs to choose the tab “My service setting”
- To receive these rights, the supplier user needs to contact his supplier company admin



## SupplyOn Services DMS – Introduction

# SupplyOn Services/ DMS – Introduction

## Access to Document Management System

The screenshot shows the SupplyOn DMS interface. At the top, there is a navigation bar with links: My SupplyOn, SupplyOn Services, Administration, and Log Out. The SupplyOn logo is on the right. Below the navigation bar, there is a dropdown menu for 'SupplyOn Services' with options: Sourcing, Business Directory, Document Management (highlighted), and WebEDI / VMI. The main content area has a header with 'TEST SYSTEM (Q)' and 'Corp. - Düspohl (Lieferant), Sonja'. There are links for 'My SupplyOn >', 'new documents', 'Help and support | Print | Message to support', and 'Act as substitute'. A search bar contains 'Document details, material number, process' with 'Search' and 'Reset search' buttons. A green 'Create document' button is on the right. Below the search bar, there is a 'Hierarchical view' checkbox and an 'Advanced Search' link. A table of documents is displayed with columns: Type, Name/no., Version, Title, Status, Sent by, Release date, Date of receipt, Due date, and Response status. The table contains six rows of document data.

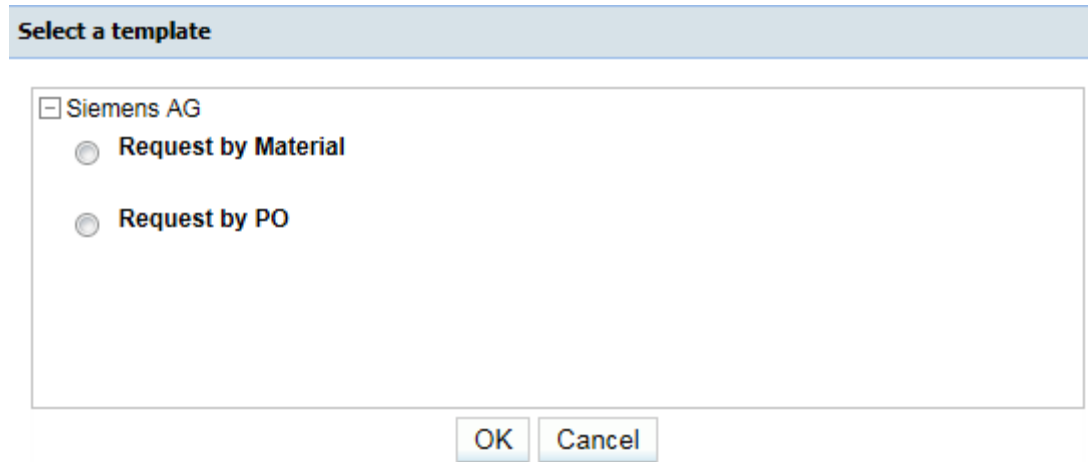
Type	Name/no.	Version	Title	Status	Sent by	Release date	Date of receipt	Due date	Response status
Logistics	CAD - Kopie (12)	4334	wertwer	Published	trq-SupplyOn AG	2/9/2015	2/16/2015 4:30 PM...		Open
Drawing	PCN_Antwortdokume	001	PCN_Antwortdokument_PHA_2	Published	trq-SupplyOn AG	12/8/2011	2/16/2015 2:00 PM...		Open
General	Quartz_Job_Tgest_20	11	Quartz_Job_Tgest_2015-A	Published	trq-SupplyOn AG		2/16/2015 1:37 PM...		Open
Drawing	PCN_Antwortdokume	001	PCN_Antwortdokument_PHA	Published	trq-SupplyOn AG	12/8/2011	2/16/2015 1:27 PM...		Open
General	CAD - Kopie (6)	08	CAD - Kopie (6)	Published	trq-SupplyOn AG	2/11/2015	2/10/2015 1:39 PM...		Open
General	social messages	01	social messages	Published	trq-SupplyOn AG		2/3/2015 4:17 PM...		Open

- The user logs on to SupplyOn
- The user clicks on Document Management of SupplyOn Services to view all new, responded, subscribed and sent documents
- To create a new document the green button has to be clicked

## SupplyOn Services/ DMS – Pull on Request

# SupplyOn Services/ DMS – Pull on request

## Selection of a template



The screenshot shows a dialog box titled "Select a template". Inside the dialog, there is a section labeled "Siemens AG" with a small square icon to its left. Below this section, there are two radio button options: "Request by Material" and "Request by PO". The "Request by Material" option is selected. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

- A new window will open after clicking on the green button and the correct document template has to be chosen
- “Request by Material” needs to be selected to request a TechDoc (E.g. Spec, Part Number, Drawing)
- “Request by PO” needs to be selected to request by Purchase Order number

# SupplyOn Services/ DMS – Pull on request Request document by Material

My SupplyOn | SupplyOn Services | Administration | Log Out |

SUPPLYON

TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp. - Düspohl (Lieferant), Sonja

My SupplyOn > Document Management: Open/new documents > Document Request Details [Help and support](#) | [Print](#) | [Message to support](#)

Document

Send Send & create document Save as draft Cancel

Document details History and references

Document Details Collapse 1

Document no.\*:

Contact: Düspohl (Lieferant), Sonja

Customer: Siemens AG

Title:

Description:

Material number\*:

Language:

Altern. e-Mail:

Status: Draft

Running number\*:

Send Send & create document Save as draft Cancel

- Fields with an asterisk are mandatory fields and need to be filled out
  - The “Document No.” is the number the Supplier must assign to identify their request
  - The “Material Number” is the actual TechDoc you require from Siemens
- Optional fields are:
  - Title, Description
  - Language: the user can define another language for the E-Mail-Alert in comparison to the settings in SupplyOn
  - Alternative E-Mail: an alternative E-Mail-Adress can be entered where the E-Mail-Alert should be send to
- The “Running number” is a running code which will be filled out automatically

# SupplyOn Services/ DMS – Pull on request Request document by Material

My SupplyOn | [SupplyOn Services](#) | [Administration](#) | [Log Out](#)

TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp. - Düspohl (Lieferant), Sonja

[My SupplyOn](#) > [Document Management: Open/new documents](#) > [Document Request Details](#) [Help and support](#) | [Print](#) | [Message to support](#)

**Document**

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

[Document details](#) [History and references](#)

**Document Details** [Collapse](#) [T]

Document no.:	<input type="text" value="12345"/>	Status:	Draft
Contact:	<a href="#">Düspohl (Lieferant), Sonja</a>	Running number:	
Customer:	<a href="#">Siemens AG</a>		
Title:	<input type="text"/>		
Description:	<input type="text"/>		
Material number:	<input type="text" value="67890"/>		
Language:	<input type="text" value="de"/>		
Altern. e-Mail:	<input type="text"/>		

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

- After all needed fields are filled out the document can be send to Siemens AG by clicking on the button “Send”
- The tab “History and references” and the button “Send & create document” are not relevant here
- The user is able to save the request after filling out all mandatory fields by clicking on the button “Save as draft”

# SupplyOn Services/ DMS – Pull on request

## Request Document by Purchase Order (PO) – page 1

My SupplyOn | [SupplyOn Services](#) | [Administration](#) | [Log Out](#)

TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp. - Düspohl (Lieferant), Sonja

[My SupplyOn](#) > [Document Management: Open/new documents](#) > [Document Request Details](#) [Help and support](#) | [Print](#) | [Message to support](#)

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**Document**

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

---

[Document details](#) | [History and references](#)

---

**Document Details** [Collapse](#) [T](#)

Document no.*:	<input type="text"/>	Status:	Draft
Contact:	Düspohl (Lieferant), Sonja	Running number*:	<input type="text"/>
Customer:	Siemens AG		
Title:	<input type="text"/>		
Description:	<input type="text"/>		
Purchase Order*:	<input type="text"/>		
Position*:	<input type="text"/>		
Language:	<input type="text"/>		
Altern. e-Mail:	<input type="text"/>		

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

- **Fields with an asterisk are mandatory fields and need to be filled out**
  - The “Document No.” is the number the Supplier must assign to identify their request
  - “Purchase Order” is the Order Number the user is referring to
  - “Position” is the number on position level in the order

# SupplyOn Services/ DMS – Pull on request

## Request Document by Purchase Order (PO) – page 2

My SupplyOn | SupplyOn Services | Administration | Log Out | SUPPLYON

TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp. - Düspohl (Lieferant), Sonja

My SupplyOn > Document Management: Open/new documents > Document Request Details [Help and support](#) | [Print](#) | [Message to support](#)

Document

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

[Document details](#) [History and references](#)

Document Details Collapse 1

Document no.\*:

Contact: [Düspohl \(Lieferant\), Sonja](#)

Customer: [Siemens AG](#)

Title:

Description:

Purchase Order\*:

Position\*:

Language:

Altern. e-Mail:

Status: Draft

Running number\*:

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

- Optional fields are:
  - Title, Description
  - Language: the user can define another language for the E-Mail-Alert in comparison to the settings in SupplyOn
  - Alternative E-Mail: an alternative E-Mail-Adress can be entered where the E-Mail-Alert should be send to
- The “Running number” is a running code which will be filled out automatically



# SupplyOn Services/ DMS – Pull on request Request Document by Purchase Order (PO)

My SupplyOn | [SupplyOn Services](#) | [Administration](#) | [Log Out](#)

TEST SYSTEM (QAS - 2013-B): trg-CAL Tech Corp. - Düspohl (Lieferant), Sonja

[My SupplyOn](#) > [Document Management: Open/new documents](#) > [Document Request Details](#) [Help and support](#) | [Print](#) | [Message to support](#)

**Document**

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

[Document details](#) [History and references](#)

**Document Details** [Collapse](#)

Document no.:  Status: Draft

Contact: [Düspohl \(Lieferant\), Sonja](#) Running number\*:

Customer: [Siemens AG](#)

Title:

Description:

Purchase Order\*:

Position\*:

Language:

Altern. e-Mail:

[Send](#) [Send & create document](#) [Save as draft](#) [Cancel](#)

- After all needed fields are filled out the document can be send to Siemens AG by clicking on the button “Send”
- The tab “History and references” and the button “Send & create document” are not relevant here
- The user is able to save the request after filling out all mandatory fields by clicking on the button “Save as draft”

# SupplyOn Services/ DMS – Pull on request

## E-Mail-Notification to Supplier



Dear Mr./Ms. Düspohl (Lieferant),

the following document was sent to your customer:

**Customer:** Siemens AG  
**Supplier:** trg-CAL Tech Corp.  
**Contact (supplier):** Sonja Düspohl (Lieferant)  
**Name/no.:** 12345  
**Document title:**  
**Release date:** 3/5/2015 2:59 PM CET

This e-mail was also sent to the following recipients: [Frank Kuchenbrod S1](#), [Dagmar Weber](#), [Patrick Abele \(s1\)](#), [Lieferant Walingner de](#), [Stefan S1 Wiesi](#), [Florian Rotter](#), [Marina Leiwesmeier](#), [Timo Bakenecker S1](#), [Weber Dagmar](#), [Timo Bakenecker S3](#), [Marina Leiwesmeier](#), [Peter Haag de.](#), [Peter Haag iqs](#), [Julian Müller](#),

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 button “Send” the supplier user receives an E-Mail which informs the user that the request has been send to Siemens AG successfully

# SupplyOn Services/ DMS – Pull on request

## E-Mail-Notification to Supplier



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Dear Mr./Ms. Düspohl (Lieferant),

**you have received the following document:**

**Customer:** trg-SupplyOn AG  
**supplier:** trg-CAL Tech Corp.  
**Contact (supplier):** Sonja Düspohl (Lieferant)  
**Name/no.:** 12345  
**Document title:**  
**Release date:** 3/11/2015 2:10 PM CET

This e-mail was also sent to the following recipients: Frank Kuchenbrod S1, Dagmar Weber, Patrick Abele (s1), Lieferant Walingen de, Stefan EN Wesi EN, Florian Rotter, Marina Leiwesmeier, Timo Bakenecker S1, Weber Dagmar, Timo Bakenecker S3, Marina Leiwesmeier, Peter Haag de., Peter Haag iqs, Julian Müller,

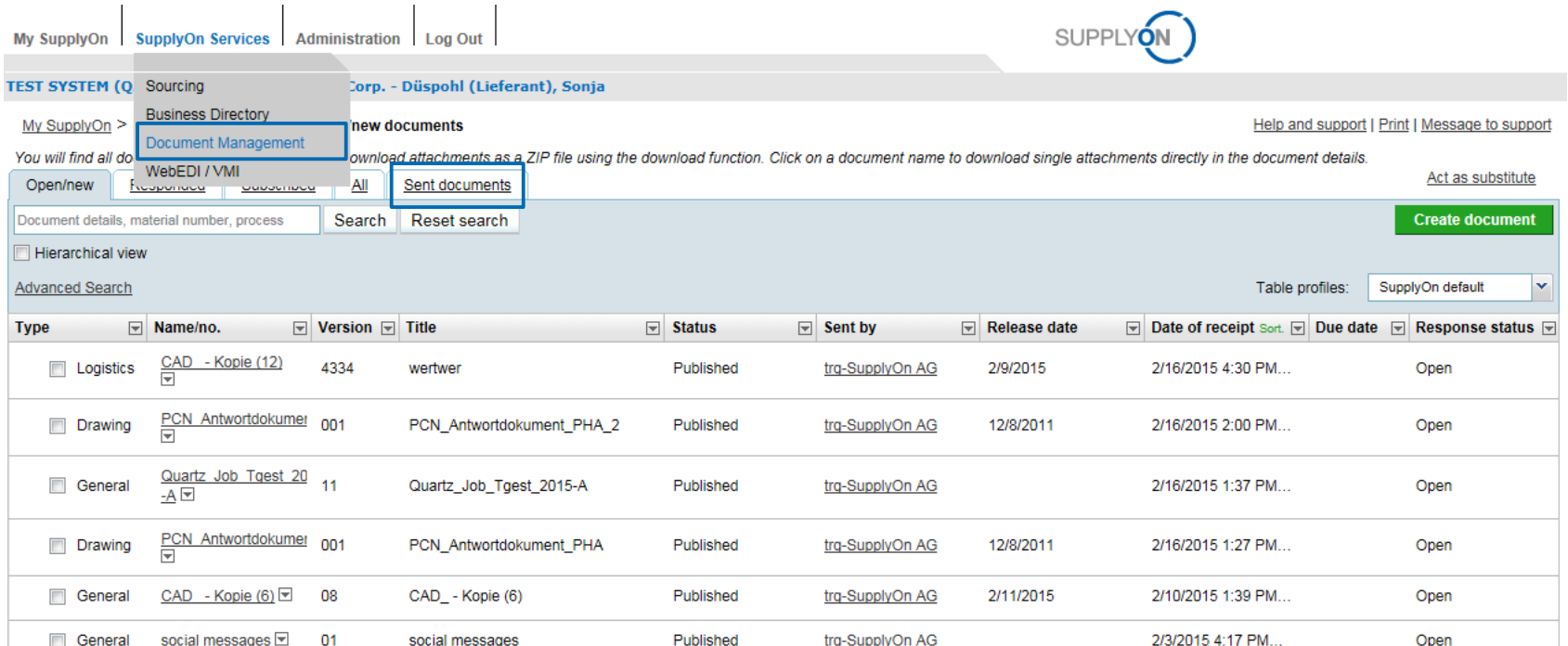
Best regards  
Your SupplyOn Team

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- After Siemens AG has uploaded the requested document, the supplier user receives an E-Mail that the document has been uploaded in SupplyOn

# SupplyOn Services/ DMS – Introduction

## Access to answered requests



The screenshot shows the SupplyOn Services web interface. The top navigation bar includes 'My SupplyOn', 'SupplyOn Services', 'Administration', and 'Log Out'. The 'SupplyOn Services' dropdown menu is open, showing options like 'Sourcing', 'Business Directory', 'Document Management' (highlighted), and 'WebEDI / VMI'. Below this, the 'Document Management' section is visible, with the 'Sent documents' tab selected. The interface includes a search bar, a 'Create document' button, and a table of documents.

Type	Name/no.	Version	Title	Status	Sent by	Release date	Date of receipt	Due date	Response status
Logistics	CAD - Kopie (12)	4334	wertwer	Published	trq-SupplyOn AG	2/9/2015	2/16/2015 4:30 PM...		Open
Drawing	PCN_Antwortdokume	001	PCN_Antwortdokument_PHA_2	Published	trq-SupplyOn AG	12/8/2011	2/16/2015 2:00 PM...		Open
General	Quartz_Job_Tgest_20	11	Quartz_Job_Tgest_2015-A	Published	trq-SupplyOn AG		2/16/2015 1:37 PM...		Open
Drawing	PCN_Antwortdokume	001	PCN_Antwortdokument_PHA	Published	trq-SupplyOn AG	12/8/2011	2/16/2015 1:27 PM...		Open
General	CAD - Kopie (6)	08	CAD - Kopie (6)	Published	trq-SupplyOn AG	2/11/2015	2/10/2015 1:39 PM...		Open
General	social messages	01	social messages	Published	trq-SupplyOn AG		2/3/2015 4:17 PM...		Open

- The user logs on to SupplyOn
- The user clicks on Document Management of SupplyOn Services The user clicks on the tab “Sent documents” to open the uploaded document

# SupplyOn Services/ DMS – Pull on request

## Open the answered request

Open/new					
Responded					
Subscribed					
All					
Sent documents					
Name, title					
Search					
Reset search					
Template	Name/no.	Title	Status	Sent by	Referenced files
<input type="checkbox"/> 2015-A Tests	12345		Published	Düspohl (Lieferant), Sonia	<a href="#">Referenced files</a>
<input type="checkbox"/> Request by Material	Test1		Published	Düspohl (Lieferant), Sonia	
<input type="checkbox"/> 2015-A Template	000011	FKU_RC2_Test	Published	Bakenecker S1, Timo	

- If the request has been answered by Siemens AG the column “Referenced files” will have an entry called “Referenced files”
- To get more information about the document and to download it the user needs to click on “Referenced files”

# SupplyOn Services/ DMS – Pull on request

## Download the document, set status, generate report

My SupplyOn > Document Management: Sent documents Help and support | Print | Message to support

[Open/new](#) [Responded](#) [Subscribed](#) [All](#) [Sent documents](#) [Act as substitute](#)

Document details, material number, process

☐ Hierarchical view Close advanced search Table profiles: SupplyOn default

Leading process number/ID:   [Delete line](#) [Add](#)

Type	Name/no.	Version	Title	Status	Sent by	Release date	Date of receipt	Response status
<input type="checkbox"/> Drawing	<a href="#">Antwortdokument_Liefe</a>	001	<a href="#">Antwortdokument_Lieferantenanfrage</a>	Published	<a href="#">trg-SupplyOn AG</a>	12/8/2011	3/11/2015 2:10 PM...	Open

1 Document [Select all](#) | [Deselect all](#) Rows per page 20 First Previous | Page 1 of 1 | Next Last

- The user is able to download the document by clicking on “Download”
- By clicking on the button “Generate report” a XML-File can be downloaded to see all background information about the selected document
- By clicking on the name of the document the request can be seen, by clicking on the drop-down the status of the document can be set from “Open” to “In processing”, “Accepted”, “Decline” or “Accepted with agreement” in order to inform Siemens AG
- Siemens AG will be informed via E-Mail which status has been set by the supplier

# SupplyOn Services/ DMS – Pull on request

## Details of request

[Send feedback](#) [Cancel](#) [More ▾](#)

[Document details](#) [History and references](#) [Download](#)

**Response attachment** [Collapse](#) [T](#)

Response from: [trq-CAL Tech Corp.](#)

Status: Open [Change](#)

**Document details** [Collapse](#) [T](#)

Type:*	Drawing	Delivery date:	Mar 11, 2015 2:10:25 PM
Document name/number:*	Antwortdokument_Lieferantenanfrage		
Version:	001	Company:	<a href="#">trq-SupplyOn AG</a>
Status:	Published	Contact:	<a href="#">Bakenecker, Timo</a>
Release Date:	12/8/2011		
Additional Contact:	<div></div>		
Title:	Antwortdokument_Lieferantenanfrage		
Description:	<div>Antwortdokument_Lieferantenanfrage - Basis Document for DMS testing</div>		
Material number:	10000001 <a href="#">Show values</a>		
Attachments:	No attachments <a href="#">Details</a>		

[Send feedback](#) [Cancel](#) [More ▾](#)

- This view of the request opens when the user has clicked on the name of the document
- The user can download the document again by clicking on the drop-down “More”
- The user can set the status of the document again from “Open” to “In processing”, “Accepted”, “Decline” or “Accepted with agreement”

**SupplyOn Customer support will support the supplier during the productive usage of Pull on Request (not for testing)**



# SupplyOn Customer Support

## SupplyOn assists you in using its solutions

### User hotline – available 24/7

- SupplyOn provides its users with a hotline in eight different languages (German, English, French, Spanish, Italian, Portuguese, Korean and Chinese).
- The hotline is available 24/7 and assists you quick and competent, if you have any questions concerning SupplyOn.
- **Telephone (free of charge)**
  - from Germany: 0800.78 77 59 66
  - from USA/Canada: 1.866.78 77 59 66
  - from Mexico: 01800.123 32 31
  - from China (North): 10800.7490127
  - from China (South): 10800.4900114
  - from any other country: +800.78 77 59 66
- **E-mail:**  
[Customer-Support@SupplyOn.com](mailto:Customer-Support@SupplyOn.com)
- **Online Help:**  
SupplyOn provides you with a comprehensive online help, available for all functionalities and for all screens the supplier is currently working in