

AirSupply

# Training guide for users





AirSupply Dashboard July 2022





# Index

Index of AbbreviationsPreamble		3
		3
1	The Dashboard at a glance	5
1.1	Elements and areas in the Dashboard	5
1.2	Pages in the Dashboard	9
2	Filters	10
2.1	Creating a filter	10
2.2	Editing filters	14
2.3	Deleting a filter	15
3	Alerts	16
4	Search	18
4.1	Quick search	18
4.2	Advanced search	19
4.3	Power search via the ,Advanced Search'	23
4.4	Advanced search for one than one Purchase Order	24
4.5	Search profile	25
5	Conclusion	27





#### **Index of Abbreviations**

CTR Customer to Review DA Despatch Advice

EDI Electronic Data Interchange
ERP Enterprise Ressource Planning

FC Forecast

GR Goods Receipt

MRP Material Requirements Planning

M2M Machine to Machine PO Purchase Order

Qty Quantity

Ref. Referenced Document
SBI Self-Billing Invoice
STC Supplier to Commit
UOM Unit of Measure

VMI Vendor Managed Inventory

#### **Preamble**

The AirSupply training guide is kept generic, and the supplier must comply with his customer scope and specificities. A document "Customer matrix" is available with the needs to be considered by the supplier.

#### Contact:

Mailto: AirSupply-Support@SupplyOn.com

Germany: 0800. 78 77 59 66 International: +800. 78 77 59 66 USA / Kanada: 1.866. 787.7596

China: 10800. 7490127 oder 10800. 4900114

Mexiko: 01.800. 123.3231

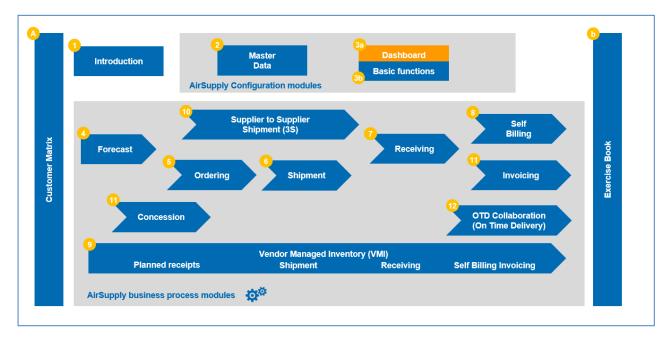
Training: www.supplyon.com/en/training/





The AirSupply user training guide is composed of 13 modules, 1 customer matrix and 1 exercise book. This module is dedicated to the Dashboard.

The following figure gives an overview of the AirSupply training modules.



### Objectives of the Dashboard module

The *Dashboard* module presents the features and capabilities of the first page that appears when you access AirSupply It shows:

- The Dashboard user interface.
- Configuring filters for the Dashboard.
- Alerts in the Dashboard.
- Searching for data.





# 1 The Dashboard at a glance

The Dashboard is the first page that is displayed when you open AirSupply.

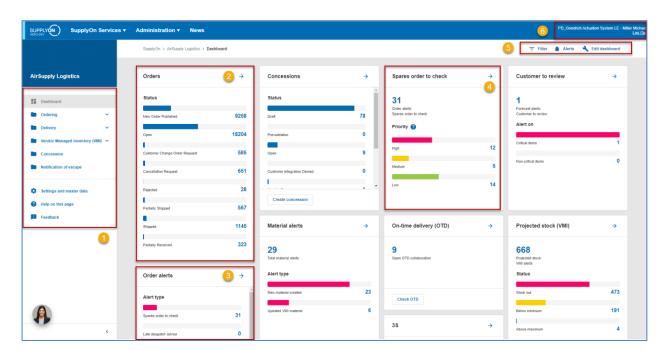
The Dashboard allows the user to quickly access all processes and easily customize views to simplify their daily work.

The Dashboard contains links to all supply chain processes in which the user is involved.

Note: If the Dashboard does not display all the expected areas when you first connect, check your user rights settings, or contact your AirSupply administrator.

#### 1.1 Elements and areas in the Dashboard

The following areas are the same for supplier and customer users.



The marked areas are explained below.

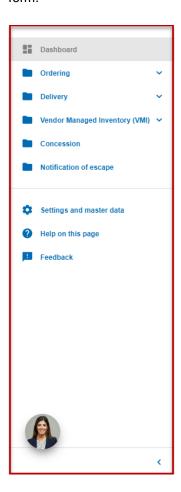




# Navigation drawer

Links to all supply chain processes to which the user has access are provided in the navigation drawer.

Additionally, there is a link to the settings and master data, the AirSupply help pages, and a feedback form.



The navigation drawer can be collapsed and expanded again using the arrow at the bottom right end of the navigation area.

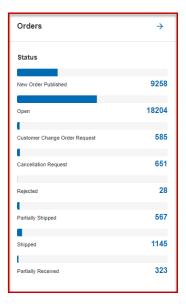




# 2 6 4 Cards displaying statuses, alert types or priorities

The following card types are displayed in the Dashboard:

 Cards that show the status of supply chain processes, for example, the different statuses of an order.



Clicking an order status will take you to the 'Orders' page. On this page only the orders with the selected status are displayed.

Cards that show the appropriate alert types for a process.



Clicking on alert type displays the "Alert overview" page with the corresponding tab.





• Cards that show the priorities for an alert type, for example, the priorities for the alert type "Spare parts order for processing".



Clicking on an alert type displays the "Alert overview" page with the corresponding tab

Note: Alerts are explained in the [3.0\_Alerts] section of the 'Dashboard' module.

Note: Not all data for which the user with the corresponding role has permission can be accessed via the cards. However, this is possible via the links in the navigation drawer.

# 5 Filter, alerts, and Edit dashboard



The 'Filter' link allows you to define a filter that determines which data should be displayed.

Note: Filters are explained in section [2.0\_Filter] in the 'Dashboard' module.

The 'Alerts' link can be used either to display the overview page for all alerts or to select pages in which the alerts for a specific process type are displayed.

Note: Alerts are explained in the [3.0\_Alerrts] section of the 'Dashboard' module.

Using the 'Edit dashboard' link, you can specify which cards should be displayed in the Dashboard.

# **6** Company name and username

The company and the name of the logged-in user are displayed here.



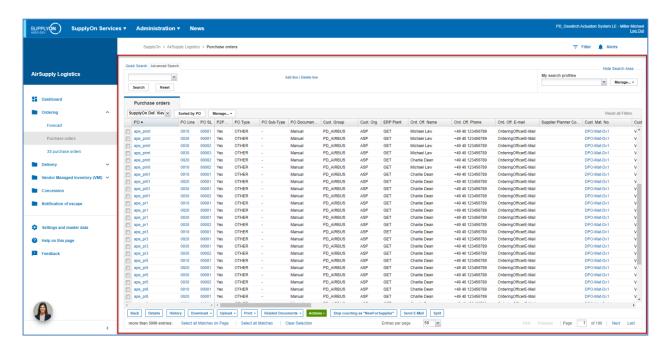
For more information about the company organization data, refer to the Master Data module [Ref. 2].



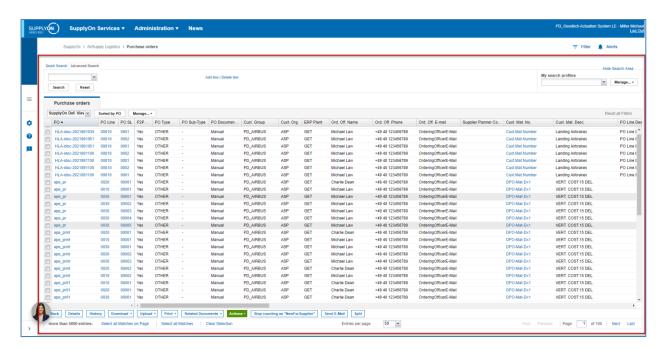


# 1.2 Pages in the Dashboard

When a link is clicked in the Dashboard or navigation drawer, the corresponding page is displayed with the requested data. The following example shows the 'Purchase orders' page.



When the navigation drawer is collapsed, more space is available for the page.



In this module and all others, only the area marked in red is shown below. The red area is meant when talking about specific pages.





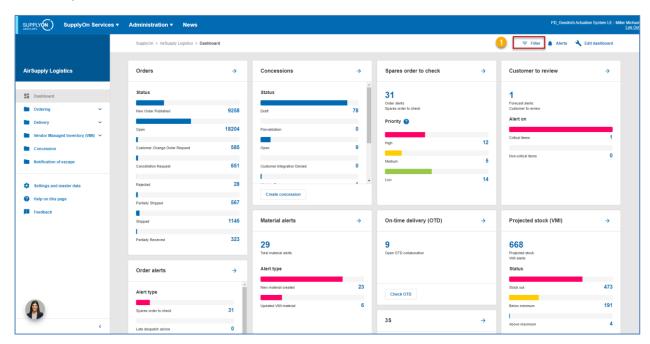
#### 2 Filters

Filters allow you to specify which data should be displayed in the Dashboard and pages. Since an activated filter is applied to all pages accessible from the Dashboard, an active filter is also called a global filter.

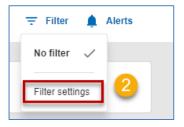
# 2.1 Creating a filter

Any number of filters can be created, but only one filter can be active.

Olick ,Filter'.



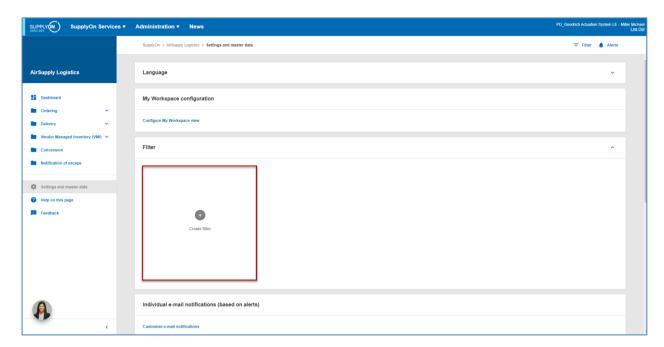
Click ,Filter settings'.



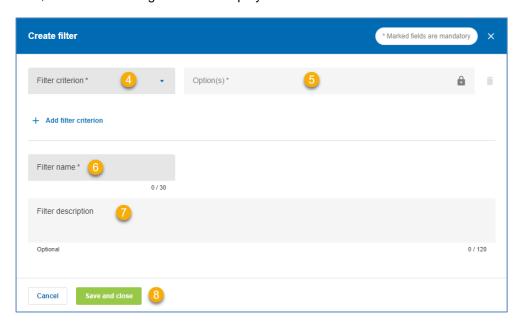




3 Click ,Create filter '.



The ,Create filter dialog window is displayed.

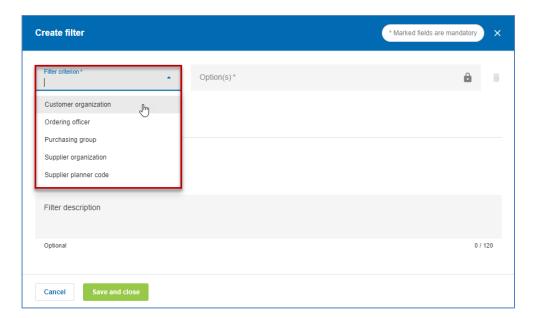


Mandatory fields are marked with \*.

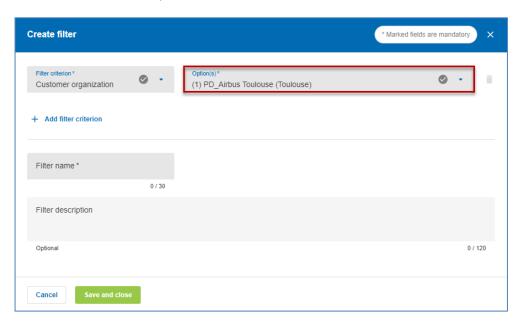




4 Select a filter criterion, for example 'Customer organization'.



5 Select one or more options.

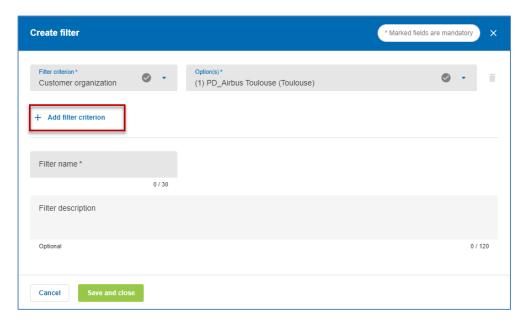


The available options depend on the selected filter criterion.

You can add more filter criteria and options by clicking 'Add filter criterion'.







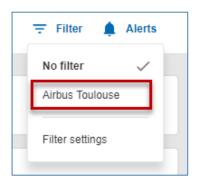
#### Tipp for using filters

A useful filter for customer users is the selection of Ordering Officer names.

Each material managed in AirSupply can be assigned an Ordering Officer Code and a Name. If you want to limit your view to data corresponding to one or more Ordering Officer Codes for which you are responsible, you can select one or more names or codes from the 'Ordering Officer Names' drop-down menu.

- A useful filter for supplier users is the supplier planner code, which can be assigned to any material managed in AirSupply.
- 6 Enter a unique name for the filter in 'Filter name'.
- Filter an optional description for the filter in 'Filter description'.
- Save the newly created filter.

The newly created filter can now be selected in the filters.



The selected filter is then used to filter the data displayed in the Dashboard and pages.



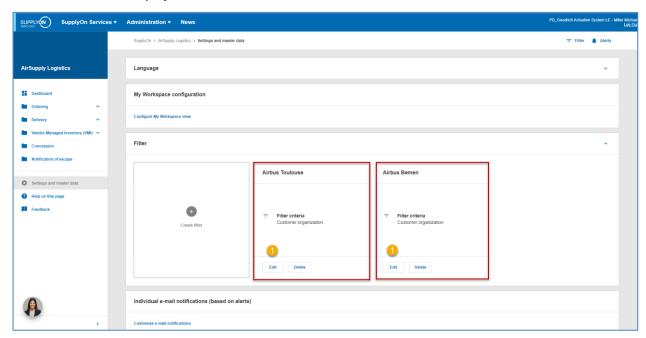


# 2.2 Editing filters

You can edit already created filters at any time.

In the Dashboard, click 'Filters' and then 'Filter settings'.

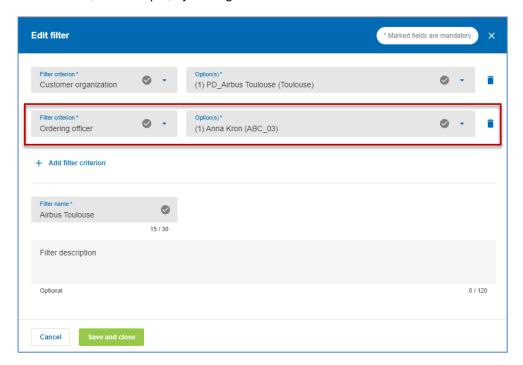
The created filter is displayed.



Olick 'Edit', for the filter you want to change.

The ,Edit filter' dialog window is displayed.

Edit the filter, for example, by adding another filter criterion.



2 After making the changes, save the filter.





# 2.3 Deleting a filter

You can delete filters that have already been created.

Click 'Filters' in the Dashboard and then 'Filter settings'.

Click 'Delete' for the filter you want to delete.

The 'Delete filter' dialog box is displayed.

Click 'Confirm'.





#### 3 Alerts

Alerts inform the user of a required action that has to be done or informs the user of a new/important event.

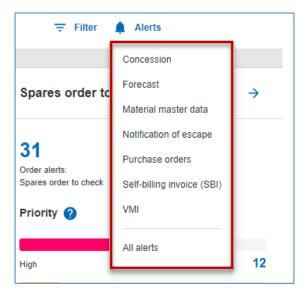
In AirSupply, there are the following process types:

- Forecast
- Purchase Order
- VMI
- Despatch
- Stock information
- Self Billing Invoice
- Material Master Data

Each process type is described in the dedicated module (for example forecast process type is described in the 'Forecast' module [RD4]).

An alert disappears when the user has made the relevant corresponding action(s), for instance, a supplier commitment in the forecast process.

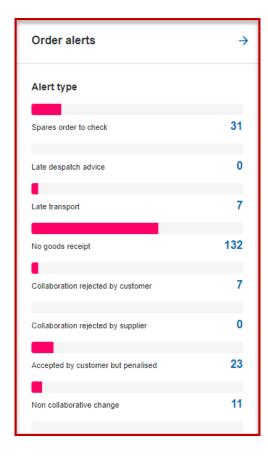
The 'Alerts' link can be used either to display the overview page for all alerts or to select pages in which the alerts for a specific process type are displayed.





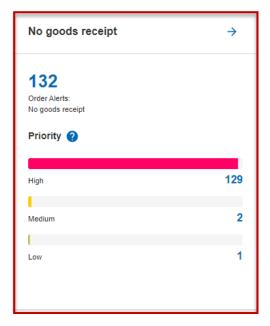


In the Dashboard, alerts are additionally displayed in different cards, for example, the card for order alerts.



The displayed number is the sum of the alerts with the respective priority High, Medium and Low.

In some cards only one type of alert is displayed, there it is split up with the corresponding priorities (High, Medium, Low), such as the card for the alert 'No goods receipt'.



The number of alerts depends on the selected filter.





#### 4 Search

A key capability of AirSupply solution is to find information on published data, using the search function. There are two search functionalities:

- "Quick Search"
- ,Advanced Search'

Each table has its corresponding search section.

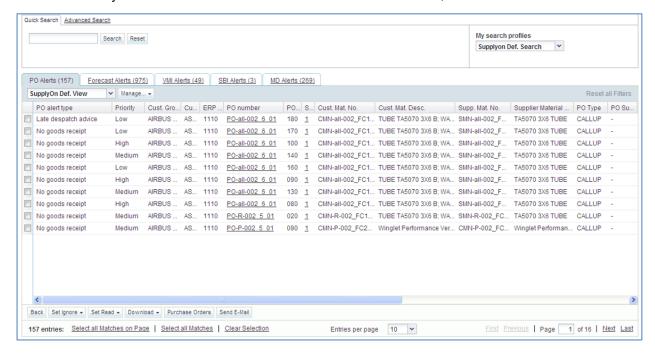


- The search area can be hidden by clicking the 'Hide Search Area' area link.
- This section is used to perform quick searches and advanced searches.
- 3 You can save your search criteria with 'My search profiles'.

#### 4.1 Quick search

'Quick Search' allows you to search some table entry by keyword. This search is available for any table that contains data, such as the alert tables.

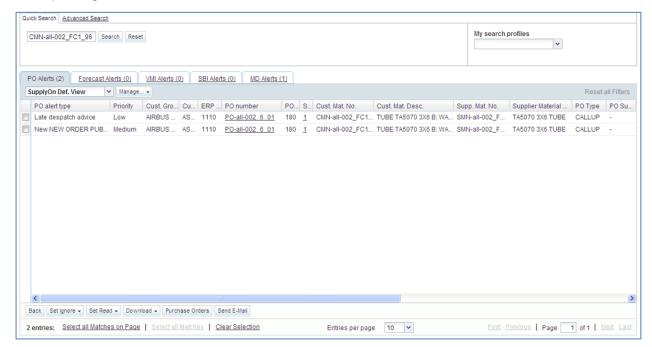
Quick search keywords are case sensitive and can contain wildcards "?", "\*" to facilitate ease of use.







For instance, if you want to search only for data in 'PO Alerts' for a specific material number, enter the corresponding name or code in the 'Quick Search' line.



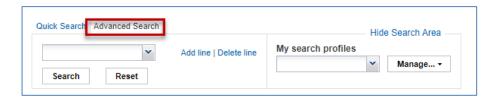
#### 4.2 Advanced search

The 'Advanced Search' allows you to query specific content (articles, delivery note positions, etc.) within tables using search criteria.

The principle of the 'Advanced Search' is a multi-criteria query on the fields that characterize the tables. For instance, a Purchase Order is searchable by the fields 'Customer Material Number' or Promised Date'. Different operations can be applied to each query criterion (for example for a date, 'earlier or equal to').

#### Accessing the ,Advanced Search'

You can use the 'Advanced search' in any table. Usually, the 'Advanced search' tab is chosen automatically. This means that in the top of the screen the 'Advanced search' tab is the active search tab. If this is not the case, click the 'Advanced search' tab.

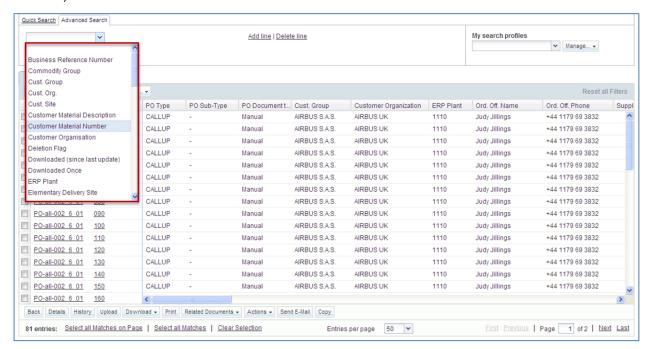




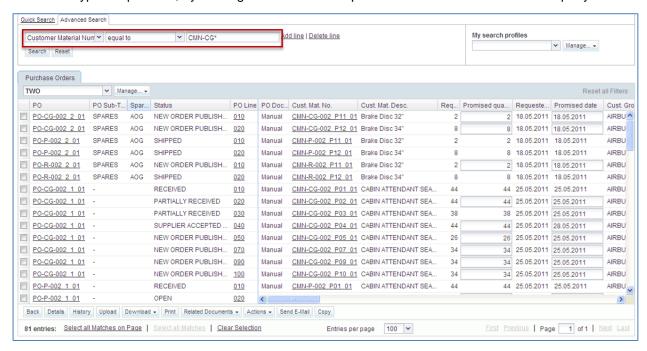


#### Defining the criteria for the ,Advanced search'

Select the first criterion of the query, by clicking on left dropdown menu (for example 'Customer Material Number'):



Define the type of operation, by clicking on the middle dropdown menu and the value for the query.

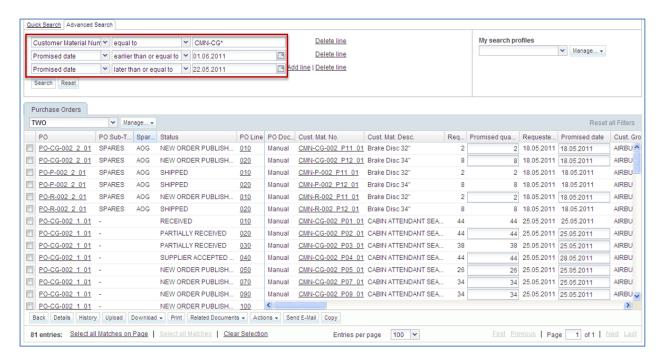


Note that '\*' represents a wildcard character.

For a search on multiple criteria, you can add one or more rows. For each row, you can define the operation associated with the criterion. In the following example, the query is refined by a range of "Promised date".

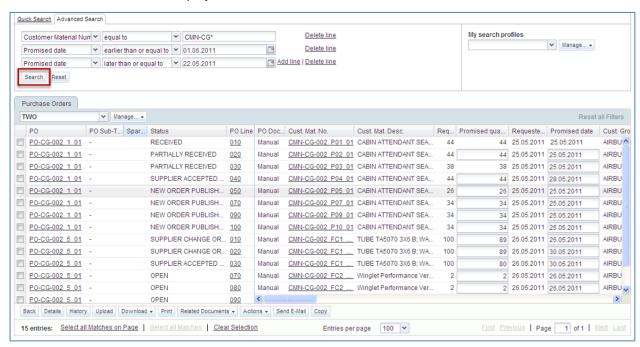






#### Performing an ,Advanced Search'

Click the 'Search' button to display the search result.

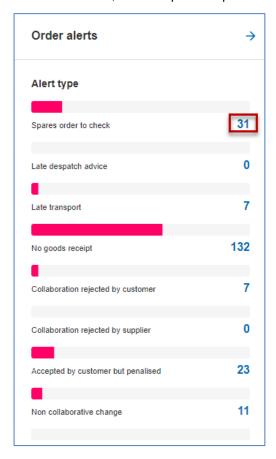




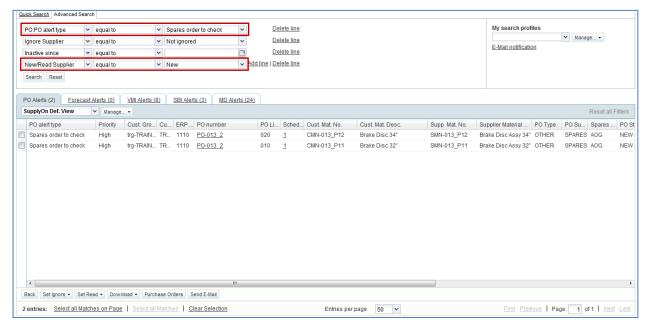


#### ,Advanced Search' on alerts

For alerts, the 'Advanced Search' is predefined by the value of the alert type. Click on the alert, for example on 'Spare order to check'.



The filter is now predefined by the corresponding values for the criterion. In this case the alert type 'Order' is equal to 'Spare parts order for processing' and 'New/read' is equal to 'New'.



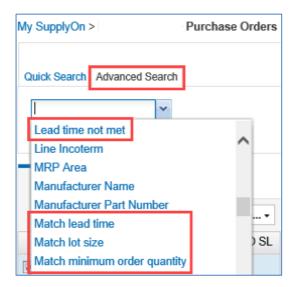
A alert remains active until the cause of the alert has been corrected or the alert has been replaced by a new alert.





#### 4.3 Power search via the 'Advanced Search'

The 'Power Search' allows you perform several checks of the Purchase Order data against data entered in the 'Supplier Master Data'.



There are four different types of 'Power search', which you can find via the 'Advanced search'.

#### Lead time not met

This query checks that the requested date is not okay by comparing it against the PO SL Pub. Date combined with the flexible field "Lead time (calendar days)" set on a material. Material without this field set will always be valid for this query.

#### Match lead time

This query checks that the requested date is okay by comparing it against the current date combined with the field "Lead time (calendar days) set on material mater data. Material without this field set will always be valid for this query.

#### Match lot size

This query checks that the requested quantity is a multiple of the value in field "Lot size" in material master data for this article. If no lot size is set at material level, lot size is assumed to be irrelevant.

# • Match minimum order quantity

This query checks that the requested quantity is more or equal to value entered in the field "Minimum order quantity" in material master data. If the flexible field is not set the query will assume that the minimum quantity is zero. Orders for this material will always be valid for this query.

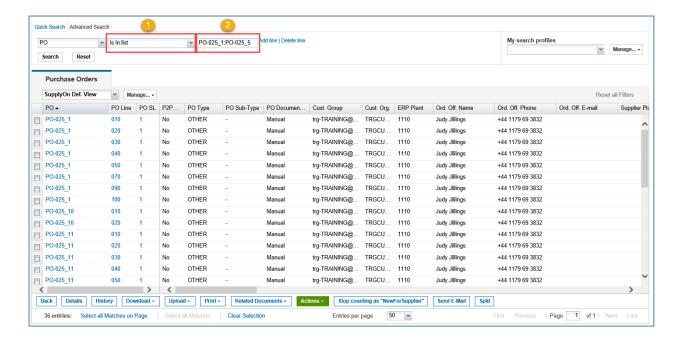
These four different checks are only available in the 'Advanced search' in the Purchase Order screens. You find details how and where to enter the different values in the 'Supplier Master Data' in the "Master Data' guide in chapter 4.1.2.



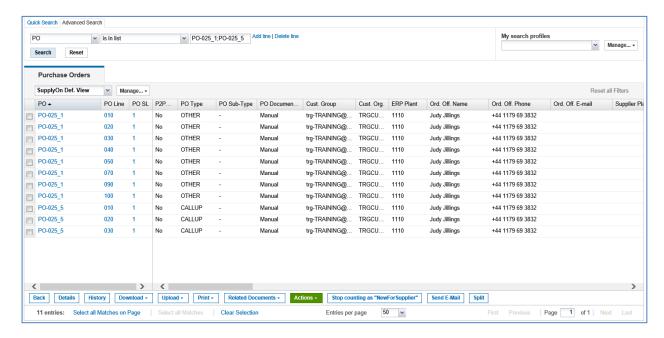


#### 4.4 Advanced search for one than one Purchase Order

There is an operator 'is in list' available to allow that you can search for more than one Purchase Order number. Select the operator 'is in list' 1 and enter the relevant Purchase Order numbers separated by ':' 2.



The result displays the entered Purchase Order numbers.







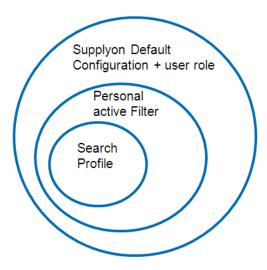
# 4.5 Search profile

Creating a search profile allows you to save an item of search criteria or a list of search criteria. This search profile is related to a table, for example to the 'Purchase Order' table.

The SupplyOn Default Configuration and your user role define which data you can access in AirSupply.

A search profile allows searching for specific data. This search is done within the data you already prefiltered by a filter. It has no impact on the data displayed in the Dashboard.

The following figure illustrates the three levels of data display.

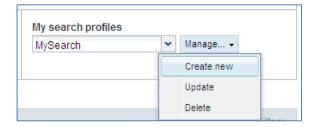


#### Creating a search profile

For your search, after setting advanced search criteria, enter a name in the field under 'My search profiles'.



Click 'Manage ...' and then click 'Create new'.



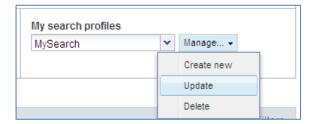
The 'Profile created' message is displayed, confirming that a new search profile has been created.





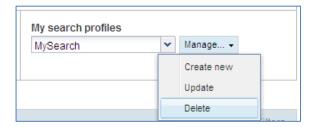
# Updating a search profile

If you make changes on your search criteria, you can update your search profile by clicking 'Manage' and then 'Update'.



# Deleting a search profile

To delete a search profile, click 'Manage' and then 'Delete'.



The following dialog window is displayed. Click ,Yes' to confirm.







# 5 Conclusion

The Dashboard is the first page that is displayed when you access the AirSupply platform.

All data is easily navigable through the Dashboard.

In this module, the following aspects have been explained:

- The structure of the Dashboard
- How to create filters
- Alerts
- Search functions in AirSupply

The next module is titled 'Basic functions' [Ref. 3A].