

EHS Procurement Portal

Operating instructions for suppliers

Table of contents

Contents

EHS Procurement Portal	1
Operating instructions for suppliersTable of contents	1
1. Goals & benefits of the EHS Procurement Portal	3
2. How can I get further help?	4
3. Set up access to the EHS Procurement Portal	5
3.1. Initial registration (first person in your company)	5
3.1.1. Step 1 - General	5
3.1.2. Step 2 - Personal data	6
3.1.3. Step 3 - Company data	6
3.1.4. Step 4 - Consensus	9
3.2. Set up access for other people at the supplier	9
4. Instructions for using the individual modules & functions	10
4.1. Supplier dashboard	10
4.2. Master data	11
4.2.1. Basic data	11
4.2.2. Product groups	11
4.2.3. Contact persons	11
4.2.4. Company profile	13
4.3. Documents & workflows	13
4.3.1. Standard documents	14
4.3.2. Tickets / Workflows	14
4.3.3. Documents Pure	15
4.4. Requests & measures	16
4.4.1. Inquiries / Request for quotes ("RFQ Pure")	16
4.4.2. Actions / Measures	21
4.5. Supply Chain Management (SCM)	24
4.5.1. Orders and order confirmations	25
4.5.2. Delivery bill	28
4.5.3. Invoice	30
4.5.4. Credit note	31
4.6. Information system	32
4.6.1. Overview	32

1. Goals & benefits of the EHS Procurement Portal

The EHS Procurement Portal is an Internet application that is used jointly by suppliers and EHS to map processes across companies and exchange information in real time in all areas of collaboration.

Some reasons why you as a supplier should use the portal:

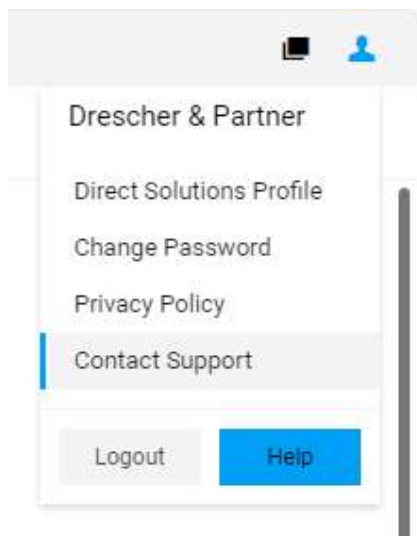
- Use of the portal completely **free of charge** for you as a supplier
- **Transparency** of all open processes with EHS
- **Independent modification of relevant master data** such as contact persons or bank details
- Access to **key figures, e.g.** on delivery reliability and quality
- **Seamless payment of** your invoices created via the portal (as no manual data entry steps are necessary on the part of EHS)
- **Reduction of queries** and emails in communication with EHS
- **Expansion of your business with EHS** through preferential treatment in tenders

2. How can I get further help?

If you require further support for using the portal in addition to this document, you can either use the online help or contact the free support team by e-mail or telephone.

If you are logged into the portal, you can click on the person symbol at the top right and select the contact support menu item.

Alternatively, you can contact jdsupport@jaggaer.com directly or call +1 (800) 233-1121 for assistance.



3. Set up access to the EHS Procurement Portal

The portal can be accessed with a user name and password via the following link:

<https://app11.jaggaer.com/portal/EHS>

If you have not yet received a user name, a new user can be created by your colleagues who already have access to the supplier portal. You can find more information on this in chapter 3.2.

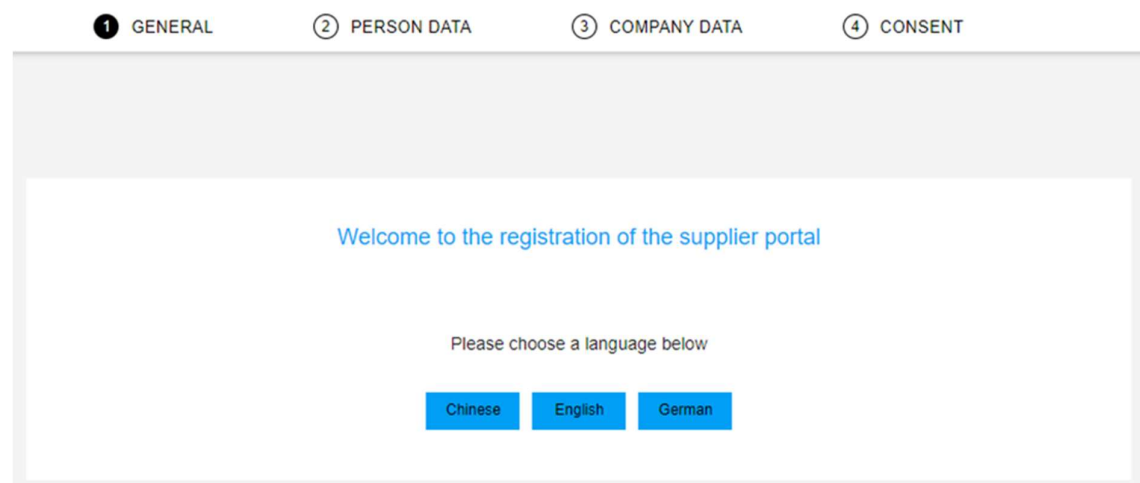
If no employee from your company has access data for the EHS Procurement Portal yet, as an existing supplier you need an invitation by e-mail to be able to register. If required, please request this by e-mail from supplier-portal@EHS.de, stating your supplier number. As soon as you have received the invitation, please continue reading in chapter 3.1.

3.1. Initial registration (first person in your company)

Use the link in the invitation to start the registration process. This consists of four steps:

- Select language
- Check & add user details
- Check & complete company details
- Confirm terms of use

3.1.1. Step 1 - General



1 GENERAL 2 PERSON DATA 3 COMPANY DATA 4 CONSENT

Welcome to the registration of the supplier portal

Please choose a language below

Chinese English German

The first tab during self-registration is called General. First you have to select a language, with which you can then continue working.

3.1.2. Step 2 - Personal data

The screenshot shows a web form for adding a contact person. On the left, there is a sidebar with contact details: Website URL, E-Mail (jdsupport@jaggaer.com), Telephone (+1 (800) 233-1121), and Documents (General Terms and Condi...). The main form area is titled 'CONTACT PERSON' and contains the following fields: Salutation (Mx.), First name* (mandatory), Last name* (mandatory), E-Mail* (john.smith@mail.com), Loginname* (mandatory), and Mobile (with a dropdown for country, Area, and Number). At the bottom of the form are 'Back' and 'Continue' buttons.

The second tab is called Personal data. Further information about the contact person is required here. The name, e-mail address and login name of the new contact must be entered. Mandatory fields are marked with an asterisk.

Information on how to contact support is displayed on the left-hand side.

3.1.3. Step 3 - Company data

The company data is requested in the third tab. First enter the company name, country and city here.

The "D&B Lookup" button will then appear, which you should click on - this will compare the data entered with a supplier database.

✓ GENERAL
 ✓ PERSON DATA
 ● COMPANY DATA
 ④ CONSENT

Website URL
[www.jaggaer.com](#)

E-Mail
jdsupport@jaggaer.com

Telephone
+1 (800) 233-1121

Documents
[General Terms and Condi...](#)

D&B Lookup

Company name*

Country*
Germany

City*

If your company is registered with D&B, you will then receive a list of companies that match your details. Select the correct company from the list and then click on Apply .

If you cannot find any suitable results in the list, please check the information you have entered again. If you have scrolled to the bottom of the list and your company is not there, please click on Enter data manually.

Click here to progress the address validation ✕

Can't find your company? Scroll down to enter data manually.

Search for anything... Count: 1

DUNS	Company	Address	Register Number	Principal
315731497	JAGGAER	1111111111 1111111111 1111111111		

The input mask then expands to include further fields, which you should check or complete.

TAX INFORMATION

VAT code

Tax number

Tax number 1

Chinese Business Number

COMMERCIAL DATA

Currency 

Payment terms

Incoterms

Then click Continue at the end of the list.

3.1.4. Step 4 - Consensus

☑ GENERAL ☑ PERSON DATA ☑ COMPANY DATA **4** CONSENT

To access and use JAGGAER as a supplier, you are required to accept the Supplier Access Terms.

I agree and accept [Supplier Access Terms](#).

To make your profile visible in the JAGGAER Supplier Network for purposes of pursuing business transactions, please indicate your agreement below.

I agree that JAGGAER will use the company and personal data entered in the course of the registration on the supplier portal of SICK in order to allow all customers of JAGGAER to find your organization via the JAGGAER Supplier Network. You may revoke your agreement and discontinue visibility in the JAGGAER Supplier Network at any time by updating the visibility setting in your company profile.

The next tab is Consent, which asks for your consent to certain documents.

It is mandatory to agree to the terms of use of the EHS Procurement Portal, which is divided into two documents - the technical conditions of the supplier Jaggaer and the terms of use formulated by EHS.

Optionally, you can agree to store your data in the Jaggaer Supplier Network. This will make your company visible to other Jaggaer customers who are looking for new suppliers.

3.2. Set up access for other people at the supplier

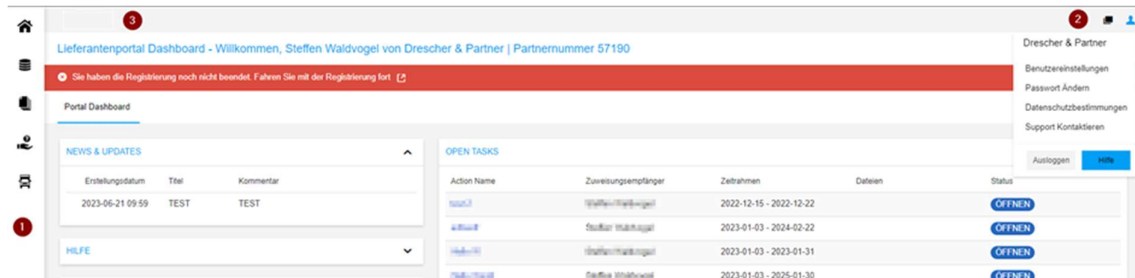
People with access to the portal can create their colleagues independently. Details can be found in chapter 4.2.3 can be found.

4. Instructions for using the individual modules & functions

Access the portal with username and password via this link:

<https://app11.jaggaer.com/portal/EHS>.

If you do not yet have a user, please read chapter 3.



The screen is divided into three elements:

1. The navigation bar on the left-hand side - click on the icons to navigate to the respective modules.
2. You can change your user settings, access the help pages or contact support by clicking on the person symbol at the top right.
3. After logging in, the supplier portal dashboard is displayed in the middle area. You can return here at any time by clicking on the house symbol at the top left.

4.1. Supplier dashboard

The supplier dashboard shows you processes in various boxes where EHS is waiting for feedback from your company and you need to take action. Click on the respective processes in these boxes to access the processing screen.

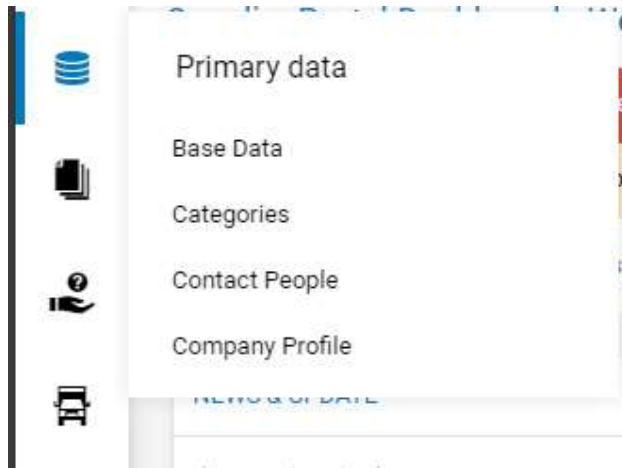
Special case: If not all master data is complete, you will see the following message: "You have not yet completed registration. Please continue with the registration".

Sie haben die Registrierung noch nicht beendet. Fahren Sie mit der Registrierung fort

In this case, click directly on the symbol in this message to go to the relevant place. The message disappears as soon as you have clicked on "Publish" in the last registration step. Further explanations of the individual views can be found in chapter 4.2.

4.2. Master data

You can edit your master data via this menu item.



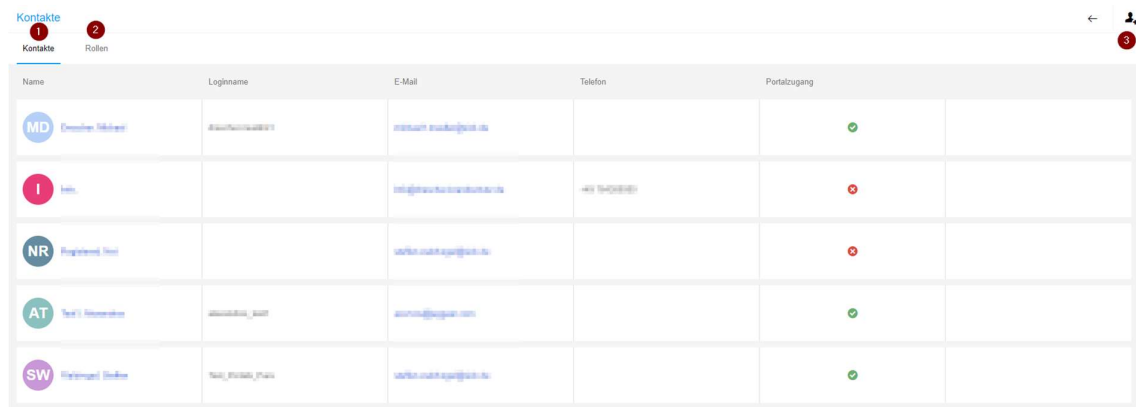
4.2.1. Basic data

Company details can be added here. Please note that some fields may be read-only.

4.2.2. Product groups

Here you can see for which product groups your company is listed with EHS.

4.2.3. Contact persons

A screenshot of a software interface showing a table of contact persons. The table has columns for Name, Logname, E-Mail, Telefon, and Portalzugang. There are five rows of data. The first row has a blue circle icon with 'MD' and a green checkmark in the Portalzugang column. The second row has a red circle icon with 'I' and a red X in the Portalzugang column. The third row has a blue circle icon with 'NR' and a red X in the Portalzugang column. The fourth row has a green circle icon with 'AT' and a green checkmark in the Portalzugang column. The fifth row has a purple circle icon with 'SW' and a green checkmark in the Portalzugang column. Above the table, there are two tabs: 'Kontakte' (1) and 'Rollen' (2). In the top right corner, there is a user icon and a red circle with the number '3'.

In this tab you can see all contacts / persons from your company who have been created in the EHS Procurement Portal (1) and which tasks / roles they have been assigned (2). Here you can also create additional persons from your company and optionally provide them with access data for the EHS Procurement Portal (3).

4.2.3.1. Create new contact

When creating a new contact, you can select whether this person should receive portal access or not.

ROLLE(N)

Anrede
Herr

Vorname*
Max

Nachname*
Mustermann

E-Mail*
max.mustermann@sick.de

Mobil
+ -- Region Nummer

Portalzugang ⓘ

Loginname*
max.mustermann

Berechtigungen*
 Supplier Portal Permissions (required)

4.2.3.2. Assigning people to a role

By assigning people to the individual roles, you can control which topics are to be handled by which people in your company. Please ensure that this data is always correct in order to avoid process delays due to incorrectly determined responsibilities.

Kontakte

Kontakte	Rollen	
Es sind noch 1 verpflichtende Zuordnungen offen		
Lieferantenbewertung Test1 Alexandros azervos@jaggaer.com	Lieferantenprofil Waldvogel Steffen steffen.waldvogel@sick.de	LLE Test1 Alexandros azervos@jaggaer.com
Bestellungen Test1 Alexandros azervos@jaggaer.com	Vertrieb / Angebote Test1 Alexandros azervos@jaggaer.com	Geschäftsführer Test1 Alexandros azervos@jaggaer.com
FAE Test1 Alexandros azervos@jaggaer.com	Innendienst Test1 Alexandros azervos@jaggaer.com	RFQ Test1 Alexandros azervos@jaggaer.com

4.2.4. Company profile

In the company profile, EHS asks for further relevant information about your company, which helps us to better assess you and align our processes accordingly. For example, EHS has different requirements for large, medium-sized and small companies.

Profil Speichern Veröffentlichen

Umsatz Details

Umsatz Unternehmen (3-Jahres-Historie) ¹²³

Umsatz Konzern (3-Jahres-Historie) ¹²³

Regionale Verteilung mit Umsatzanteil

Umsatzanteil an Automobilbranche (sofern vorhanden) (letztes Jahr)

Rentde Konzern in Prozent ¹²³

Rentde Unternehmen in Prozent ¹²³

Weitere Unternehmensdaten

Zugehörigkeit zu einem Konzern

Sind bereits Kunden direkt an Ihre EDV-Systeme angebunden?

Standorte

Maschinenliste
 keine ausgewählt

Eigentümerstruktur

Bereitschaft zur offenen Kalkulation

Versicherungen

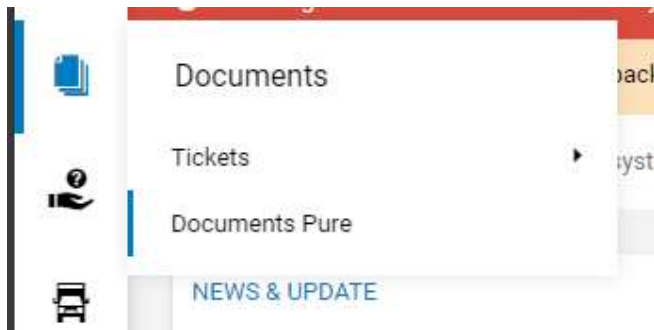
Betriebsunterbrechungsversicherung vorhanden? ---

Betriebshaftpflichtversicherung

Produkthaftpflichtversicherung vorhanden? ---

4.3. Documents & workflows

Here you will find all relevant documents and workflows ("tickets") involving your company.



4.3.1. Standard documents

This section contains generally applicable documents for your information, e.g. general terms and conditions of purchase.

4.3.2. Tickets / Workflows

By clicking on Tickets, you will receive a list of all tickets that are currently being processed by you. Tickets are electronically controlled workflows that enable a structured data exchange between EHS and its suppliers on various topics. The respective workflow type is shown in the second column.

Tip: The selection above "Show all historical tickets" gives you access to tickets that have either been completed or are currently being processed by EHS.

Alle historischen Tickets zeigen Suchen

Meine Tickets (31)

ID	Typ	Thema	Alter	Status	Erstellt von	Erstellt	Geändert	Verantwortlich
1199807	ZZ_Q Code0Combut	ReminderTest 06	5 D (00:01)	Rework by supplier	Anzeige Löschen	2023-07-20 15:46	2023-07-20 15:48	Anzeige Löschen
1199799	ZZ_Q Code0Combut	ReminderTest 05	5 D (00:47)	Waiting for supplier	Anzeige Löschen	2023-07-20 15:00	2023-07-20 15:00	Anzeige Löschen
1199769	ZZ_Q Code0Combut	ReminderTest 04	5 D (01:58)	Waiting for supplier	Anzeige Löschen	2023-07-20 14:29	2023-07-20 14:29	Anzeige Löschen
1199720	ZZ_Q Code0Combut	ReminderTest 03	5 D (04:50)	Waiting for supplier	Anzeige Löschen	2023-07-20 10:57	2023-07-20 10:57	Anzeige Löschen
1199728	ZZ_Q Code0Combut	ReminderTest 02	5 D (04:55)	Waiting for supplier	Anzeige Löschen	2023-07-20 10:52	2023-07-20 10:52	Anzeige Löschen

By clicking on the text highlighted in blue, you can open and edit the respective ticket. As a rule, you have already been informed by e-mail when a ticket has been (re)assigned to you for processing.

Depending on the workflow type, the appearance can be very different. The points that apply to all workflow types are explained below:

1. The plus and minus symbols can be used to show and hide entire field groups.
2. Mandatory entries are marked with *
3. You can use the Save button to complete the processing and send the data to EHS. If any mandatory fields are still blank, they will be highlighted in yellow and an error message will appear. Please note that there may be mandatory fields in the hidden field groups (see point 1)

- You can interrupt the processing of a ticket at any time, e.g. via the Back button or by closing the window. If you open the workflow again later, you will be suggested to continue working on the previous status

The screenshot shows a web-based ticket management interface. At the top, there are navigation buttons for 'Zurück' (Back) and 'Ticket Drucken' (Print Ticket). The main header displays the ticket title 'ZZ_CodeOfConduct - ReminderTest 05' with a red circle '4' next to it. Below this, the ticket details are shown in a grid-like format:

- ID:** #1199799 (Überarbeitung: 1)
- Erstellt von:** [User] @2023-07-20 15:00
- Ticket Überschrift*:** ReminderTest 05
- Status:** Waiting for supplier
- Gruppe:** n/a
- Verantwortlich:** [User]

Below the details, there are fields for 'Supplier Responsible (optional)', 'Supplier Responsible' (with values 57190, Drescher & Partner, Forestbird Marty), and 'Result'. A 'Comment History' section is also present.

The 'Supplier Input' section is highlighted with a red circle '1'. It contains:

- SICK Code of Conduct:** Two dropdown menus for 'SICK Code of Conduct (EN)' and 'SICK Code of Conduct (DE)'. Below them is a link: 'Click here to access SICK's Supplier Code Bitte hier klicken für den SICK Lieferantenkodex'.
- Supplier Decision*:** A dropdown menu with the value '[Bitte auswählen]', highlighted with a red circle '2'.
- Supplier Comment:** A text input field.
- Supplier Code of Conduct:** Two buttons: 'Datei auswählen' and 'Keine ausgewählt'.

At the bottom, there are three expandable sections: 'Checklist for supplier document: Does it contain rules regarding...', 'Supplier Classification', and 'System-Fields'. A red circle '3' is placed near the 'Speichern' (Save) button at the bottom right, which also shows 'Draft Auto-Saved @ 2023-07-25 15:52:27'.

4.3.3. Documents Pure

Under this menu item you will find an overview of all relevant documents. Depending on the document type, different characteristics are possible:

- EHS provides the supplier with a document for his information
- EHS provides a document and expects confirmation of acknowledgement
- EHS requests documents / files from the supplier
- EHS and the supplier work together on a document

4.4. Requests & measures

Here you will find all requests for quotations ("RFQ Pure") as well as the tasks & measures ("Actions") assigned to you.







4.4.1. Inquiries / Request for quotes ("RFQ Pure")




RFQ Pure allows you to manage your RFQs. These can be displayed or searched for, attachments can be opened, bids can be submitted and completed cost break downs can be sent. It is also possible to communicate with the purchasing department via the message portal.

4.4.1.1. Overview

All existing RFQs are listed in the RFQ overview. From here you can edit RFQs and send them back to EHS.

The following columns are displayed in the RFQ overview:

Designation	Description
RFQ no.	Number of the RFQ
Version	The purchaser can make changes to an existing RFQ and save these as versions. The version number changes with each change.
RFQ Name	The name of the RFQ
Offer status	<p>A traffic light is displayed, which shows the status of the RFQ in color. The following can be displayed:</p> <ul style="list-style-type: none"> Neu RFQ has not yet been opened In Bearbeitung RFQ has been opened, but a quotation has not yet been sent. Abgelaufen The offer period has expired. Angeboten Offer has been sent Abgebrochen RFQ was canceled by EHS Abgelehnt Offer was rejected by EHS

Responsible person	Responsible person at the supplier
Deadline	Deadline by which a bid can be submitted
Positions	Number of RFQ positions
Menu	 Editing the RFQ  Assign RFQ to another user of the supplier  Opening the RFQ

4.4.1.2. Toolbar

Search:

If you have been invited to many RFQs, you can simply use the search function to find the desired RFQ. Click on the magnifying glass in the toolbar to open a search field in which the search parameters can be entered. Search parameters can be: Name, purchaser number, version, ...



Filter:


You can use the filter to filter the list of displayed RFQs according to certain statuses or your own RFQs.





Alle
 Meine

All
 Neu
 In Bearbeitung
 Angeboten
 Abgelehnt
 Abgelaufen
 Abgebrochen

[Anwenden](#)

4.4.1.3. Edit

Click on the  icon in the menu to edit an RFQ.

RFQ ...	VERS...	NAME	ANGEBOTSTATUS	VERANTWORTLIC...	FRIST	POSITIONEN
847	1	RFQ 1001	Neu	Drescher Michael	2023-08-17 23:59	1  
846	1	4004712.5	In Bearbeitung	Drescher Michael	2023-08-17 23:59	1  

4.4.1.4. Participation

Confirm your participation in the RFQ by taking note of the documents displayed and clicking on "Agree".

You can "Decline" participation, but then you cannot submit an offer.


RFQ 1001 · 847


← Ablehnen **Zustimmen**

1 TEILNAHME 2 ALLGEMEIN 3 ANGEBOT 4 ÜBERPRÜFEN

Teilnahme

GENERELLE INFORMATIONEN


 Purchasing - Allgemeine Einkaufsbedingun...

 Administration - Impressum

4.4.1.5. General

In the General tab, you can view the RFQ header data and change certain parameters such as currency.

RFQ 1001 · 847

←  Zurück **Weiter**

1 TEILNAHME 2 ALLGEMEIN 3 ANGEBOT 4 ÜBERPRÜFEN

Kontakt Informationen Allgemein

EINKÄUFER
 Information
 email@domain.de

ANGEBOTSEINSTELLUNGEN

Währung
 Europäischer Euro

Zahlungsbedingung
 ZK03 (zahlbar innerhalb 14 Tagen netto)

Lieferbedingungen
 FH2 (CPT frei Haus, mit Verpackung, unversichert)

Lieferadresse
 Frankfurt / Main

Click Next to continue with the RFQ.


4.4.1.6. Offer

The Quotation tab provides an overview of all RFQ items, their status and further processing options.

RFQ 1001 · 847

TEILNAHME ALLGEMEIN **3 ANGEBOT** 4 ÜBERPRÜFEN

MATERIALNAME	ERFORDERLICH	STATUS
REFLEKTOR 23,0 RD 7N		Offen

You can use the order icon  to open the position details and enter the offer data. Enter all the required offer data in this mask and then click on "Save"

RFQ 1001 · 847

Abbrechen Ablehnen Speichern

TEILNAHME ALLGEMEIN **3 ANGEBOT** 4 ÜBERPRÜFEN

Artikeldetails

Position 1 von 1

Nummer: 4004712
Name: REFLEKTOR 23,0 RD 7N
Status: Offen
Warengruppe: Leasingbekleidung
Lieferanschrift: 0100, SICK AG, Waldkirch, Erwin-Sick-Str. 1, 79183 Waldkirch, DE

Datien

Dateien hier ablegen oder Hochladen

Angebots-Details

ANGEBOT

Preiseinheit: (Zahl)*: 100

LIEFERZEIT

Lieferzeit (Kalendertage)*: e.g. 1.000

Lieferdatum*: 2023-08-10

INFO

Lieferanten Material Code:


Elektronischer Katalog mit EClass verfügbar?: Wert auswählen

Preisgarantie bis:

0,00 EUR
Gesamtpreis

Menge: 1
Stückpreis: 0,00 EUR

You can use "Reject" to reject a quotation for this item.

It is possible to add an alternative item to the offer via the plus symbol . 

You can use the arrow symbol  to undo entries you have made.

4.4.1.7. Check

In the Check tab, you can finally check the entries made and send them to EHS by clicking "Send".

RFQ 1001 · 847

Zurück Senden

TEILNAHME ALLGEMEIN ANGEBOT **4** ÜBERPRÜFEN

Akzeptierte Artikel 1,23 EUR

#	MATERIALNUMMER	MATERIALNAME	POSITION WERK	BEMERKUNG	M
1	4004712	REFLEKTOR 23,0 RD 7N	0100 - SICK AG		

1,23 EUR
Gesamtpreis Angebot

Angebote Artikel 1 / 1

Frist
2023-08-17 23:59

In a final step, you can enter your internal identification.

Angebot senden

Angebotsnummer

e.g. 2983102

Ihr Zeichen

Geben Sie Ihr Zeichen ein

Wollen Sie das Angebot wirklich einreichen? Nachdem Sie das Angebot zurückgeschickt haben, können Sie es nicht mehr ändern!

Abbrechen Senden

You then have the option of printing the offer and closing the view.

4.4.1.8. News

You can send a message to EHS about an RFQ at any time. To do this, use the message function at the bottom left.



Click on "New message" to enter a message.

Keine Nachrichten

Es sind keine Nachrichten vorhanden

Neue Nachricht

The screenshot shows a message composition interface. At the top, there is a 'TAG' field with the value 'RFQ #847'. Below it is an 'AN' field with a blurred recipient name. The subject line is labeled 'Betreff hinzufügen'. At the bottom, there is a text input area labeled 'Nachricht schreiben...'.

You can view all correspondence relating to this RFQ on the left-hand side.

The screenshot shows a list of messages under the heading 'Nachrichten'. The first message is marked as 'NEU' (new) and has a subject 'Frist verlängert'. The content is 'Habe die Frist verlängert' and the time is 'Do., 15:37'. The second message has a subject 'Testnachricht' and content 'Bitte Frist verlängern', with a time of 'Do., 15:36'.

Nachrichten	
NEU	[Blurred]
Frist verlängert	
Habe die Frist verlängert	Do., 15:37
[Blurred]	[Blurred]
Testnachricht	
Bitte Frist verlängern	Do., 15:36

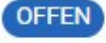




4.4.2. Actions / Measures

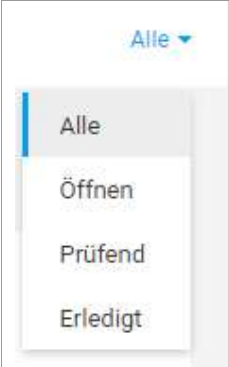
The Actions module allows EHS to define and track tasks that need to be solved by a supplier. Actions provides the ability to create individual tasks for specific cases and provides a means by which EHS can easily communicate with its suppliers about the status of the task.

4.4.2.1. Overview


All existing actions for the supplier are listed in the action overview. From here you can edit actions and send them back to EHS.

The following columns are displayed in the action overview:

Designation	Description
Action Name	Name of the action, as specified by the creator of the action.
Owner	Owner of the action. By default, this is the creator of the action, but the creator of the action can choose a different owner when creating the action.
Authorized representative	Person to whom the measure was assigned. This person is responsible for ensuring that the measure is carried out.
Time frame	Start and end date of the campaign.
Files	Files associated with the action.
Links	Links to objects associated with this action, e.g. suppliers, requests, categories, etc.
Status	<p>The status of the action:</p> <p> OFFEN</p> <p>The measure is currently being finalized by the representative.</p> <p> PRÜFEND</p> <p>The measure has been completed and is awaiting approval by the measure owner.</p> <p> ERLEDIGT</p> <p>The measure was approved by the owner of the measure and has been completed. If the action is overdue, <i>Overdue</i> appears under the status in the status field.</p>
Classification	The classification shows which superordinate category the task belongs to. For example, an action plan or supplier development
Menu	<p>Enables access to the following functions:</p> <p> Edit - Opens the action to make changes.</p> <p> Show - Opens the action in the view module. No more changes can be made here</p>
Toolbar	<p>Filters the overview of measures by status:</p> <ul style="list-style-type: none"> • All • Open • Testing • Done <p>If the setting is Open, Checked or Completed, only the actions in the selected</p>

	<p>status are displayed. If All is selected, all actions are displayed.</p>
---	---

4.4.2.2. Editing an action/measure

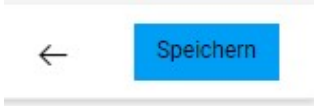

To edit an action, click on the  Edit icon for the action in the action overview. The Edit action page opens.

The [Action Content](#) section contains all information relevant to the action:

- Name
- Description
- Owner
- Authorized representative
- Time frame
- Classification
- Files
- Links

The [Action Details](#) section contains additional fields whose content can be added or changed.

Name	Description
Status	<p>Change the current status of the action:</p> <p>Open - The action has been assigned and is open for editing.</p> <p>Checking - The action has been completed by the supplier and must be approved by the owner.</p>

Processing	<p>Indicate what percentage of the measure has already been completed.</p> <p>This field is used to document the progress of the measure.</p>
Description	Enter additional details about the action.
Files	Add additional files to the progress of the action or the completion of the action.
Comments	<p>Anyone who has access to the Actions module can add comments to an action.</p> <p>Enter your comment in the Enter comment field.</p> <p>Click on Send to save your comment.</p>
<p>Toolbar</p> 	<p>←</p> <p>Go back to the overview</p>  <p>All changes must be saved. To save your changes, click on Save in the toolbar.</p> <p>As soon as you click on Save, your changes are saved and you return to the overview of actions.</p>

If an action/measure is saved in the "checking" status, it is automatically sent to EHS for checking.

EHS can decide whether the measure has been completed or whether further action is required.

4.5. Supply Chain Management (SCM)

All operational, commercial processes can be found under this menu item:

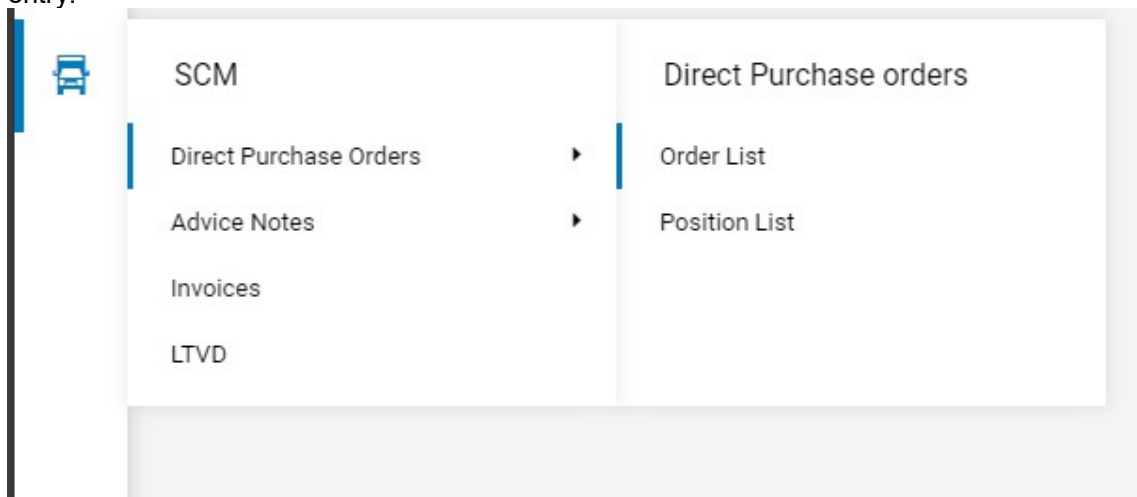
- Orders and order confirmations

- Electronic delivery bills ("ASN" - Advanced Shipping Notification)
- Invoices
- Long-term supplier declarations

4.5.1. Orders and order confirmations

You will be informed by e-mail about orders received. Please log in to the portal with your access data.

In the navigation tree on the left-hand side, select "SCM" and "Direct orders". You can then display the purchase orders either at header, item or MRP level by clicking on the respective entry.



If a purchase order has several items, these are combined into one purchase order at header level. At item level, there is one line per order item. There can be several delivery schedules per item, which are displayed in the MRP list.

As soon as you have selected an item, you will see a list of orders on the right-hand side.

You can select different views in the upper area:

Schnellansicht
 Alle
 Nicht bestätigt
 Nicht vollständig bestätigt

"Quick view" shows all unprocessed









"All" shows all orders

"Not confirmed" shows all unconfirmed confirmations

"Not fully confirmed" shows all orders that have not been fully confirmed.




Kopfebene							
Menü	Bestellnr	Anz. Pos.	Dateien	Bestellstatus	Änderungen	Bestätigung	Lieferschein erstellen
	4500088700	1	1	Versendet	0		
	4500088694	1	1	Versendet	0		
	4500088693	1	1	Versendet	0		

You can choose between the following functions in the Menu column:

Icon	Description
	Open - This takes you to the detailed view of the order, where the order confirmation can be entered.
	Jump to the item view with an overview of all items in the order.
	Jump to the schedule line level of the purchase order
	Print out the order
	You can export the order as a CSV file here
	Switches to invoicing
	Forwarding the order to another clerk who is registered as a user.
2	Displays the number of items in the orders. Click on the number to jump to the item view
3	Number of files sent (mostly original order PDF). Click on the number to display all documents
	Opens the current (last) original PDF in the print view. This is important if there are several changes for one order.

You can see whether an order has already been opened and confirmed in the Confirmation column.


The following symbols must be observed here:

Icon	Description
	The order has not yet been confirmed.
	The order has been fully confirmed.
	The order was partially confirmed.

4.5.1.1. Open orders

Click on the "folder"  to open the order in a new window.

You can open the order in PDF format under Documents. You can now also view all order details here.

The eye  symbolizes a document that has been read.

Dokumente:

Bitte öffnen Sie das Bestell-PDF!

[4500088679.pdf \(2013-07-10 10:30:00\)](#)

Attention Note:

Please note that opening the original PDF is binding. The order can only be confirmed once the PDF has been opened.

4.5.1.2. Send order confirmation

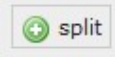
You can now confirm the following fields in the open order:

■ ■ Part no. / Designation:

Optional: For different manufacturers, please select a manufacturer approved by us here.

Sachnr./Bezeichnung

6033467 STIFTLLEIST.GE.RL2*20P. RM0,80 SMD Ihre Materialnummer: 250858 H050431 (Framatome Connectors) ▼ H050431 (Framatome Connectors)
--

- Quantity: how much of the material was ordered
- Date: possible delivery date
- Stat. delivery date: delivery date requested by EHS (not changeable)
- Price / unit: Price stored in the system
- Confirmation number: Please enter your order confirmation number here.
- (EUR). Total amount of the order
- The item can be split into partial deliveries  using the "Split button" entered here
- Note: a comment on the order can be

You can also edit the order in .csv format. To do this, you can download the order by clicking on Export.

With "Browse" you can select the path of the file and upload it with "Import".

Auftragsbestätigung als CSV hochladen Keine Datei ausgewählt.



4.5.1.3. Order status

In the order overview, the current status of the order is displayed in the order status column:

- **Dispatched:** Nothing has been done with the order yet
- **Confirmed:** Order has been confirmed as requested by the customer
- **Changed:** Order was confirmed differently
- **Delivered:** Goods receipt has already been posted at the customer
- **Advised:** Order has been notified

- ❑ **New:** If this status is displayed, something is wrong with the order. Please contact customer
- ❑ **Delivery prepared:** Delivery bill has been created but has not yet been notified
- ❑ **Partially notified, delivered, confirmed, prepared for delivery:** At least one item of the order has already been notified, delivered, confirmed, prepared for delivery


4.5.1.4. Order changes

As soon as EHS makes a change to an order, you will be notified by e-mail.

Click on the number in the "Changes" column in the order overview to open a detailed view of the changes made.

Änderungen in Bestellnummer: 4500019198

Pos.	Änderungen	Bestellung wurde geändert durch	Geändertes Feld	Vorheriger Wert	Neuer Wert	Geändert nach Bestätigung
00009	2012-12-13 15:36:14	Lieferant	Menge	50,00	30,00	Nein
00009	2012-12-13 15:36:14	Lieferant	Menge	0,00	20,00	Nein
00009	2012-12-13 15:36:14	Lieferant	Lieferdatum [JJJJ-MM-TT]	18.12.2012	20.12.2012	Nein

Back in the overview, you can view the order via the folder  and enter an order confirmation as described.

4.5.2. Delivery bill


4.5.2.1. Create delivery bill

Select SCM Direct Orders and Item List in the navigation menu.



A delivery bill can be created in the overview: Use the "plus symbol" to create a delivery note for the order item in the line. The checkbox can be used to combine several orders / items into one delivery bill.



As soon as all relevant orders/items have been checked off, you can create a delivery bill by clicking on  Lieferung erstellen .

Attention Note:

If the delivery address is not the same, deliveries cannot be combined. The checkbox is automatically grayed out. If you include forwarding agents in the process, the system also checks in the background whether a delivery goes directly to the customer or whether the forwarding agent is an intermediary (a combination is not possible here).

The following fields must be completed in the screen that appears:

- **Delivery note number:** Your delivery note number
- **Delivery note date:** Date of the delivery bill
- **Goods receipt date:** Date of the expected goods receipt
- **Goods receipt time:** Time of the expected goods receipt

Neuen Lieferschein erstellen ?

[Zurück](#) [Lieferschein anlegen](#) [Aktualisieren](#)

Details

Lieferscheinnummer:

Lieferadresse:

Lieferantennummer: 53052

Lieferscheindatum:

Wareneingang Datum:

Wareneingang Zeit:

Positionen

Kontraktnummer	Kundenmaterialnummer	Datum bis	Angeforderte Menge	Menge
4500088467	6025628 WIDERST.CE.SMD 1R00 +-1% 0805 TK100	2013-05-28	10.000,00	9.000,00

Click on "Create delivery bill" to open another overview screen : Notify delivery

4.5.2.2. Notify delivery bill

If agreed with you, you can notify a delivery. The type of packages can be defined more precisely under "Packages".

Packstücke 1 Einträge gefunden.

Höhe [m]	Breite [m]	Länge [m]	Volumen	Gewicht [kg]	Bruttogewicht [kg]	Nettogewicht [kg]	Stapelbar	Anzahl	Gebindetyp	Menü	Pos.
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	0	0	Nein	0	EURO-Palette		1

Under "Delivery note item", the exact delivery quantity must be entered in the Quantity field.

The batch and best-before date can also be specified.

Menge	Charge	MHD
<input type="text" value="2.000,0"/>	<input type="text"/>	<input type="text" value="0000-00-00"/>

Click on "Notify delivery bill" to complete the process.

Lieferschein

[Zurück](#) [Positionen hinzufügen](#) [Lieferung avisieren](#)

4.5.3. Invoice

4.5.3.1. Create invoice from purchase order

There is an option to create an invoice in the order overview.

To do this, check the box in the Invoice selection column and then click on Create invoice. (In the case of multiple selections, all selected orders are invoiced in ONE invoice)



Bestelleingang

Schnellbestätigung abschicken Erstelle Rechnung

Enter all relevant data in the invoice form that now opens and then click on "Send to EHS"

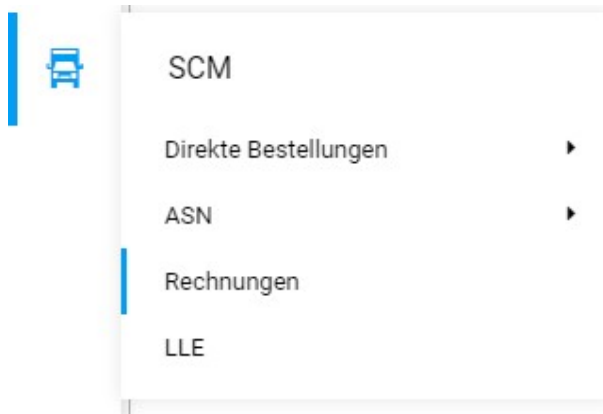
An SICK senden

Note: You can use the "Save" button to temporarily save the invoice for yourself and process it at a later date. This will NOT send the invoice to EHS.

Speichern

4.5.3.2. Invoice overview

An overview list of all invoices created can be found in the navigation via SCM - Invoices



The invoice can be opened using the folder icon in the Menu column.



You can see whether the invoice has been processed by EHS in the column "Status".

Status Released = Has been transferred to EHS and processed

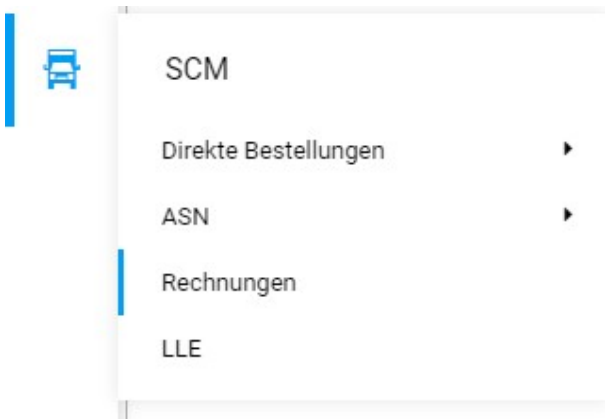
Status New = Invoice saved, not yet transferred to EHS.

Status
Freigegeben
Freigegeben
Freigegeben
Freigegeben
Freigegeben
Neu

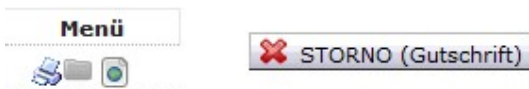
4.5.4. Credit note

4.5.4.1. Create credit note

In the navigation area under "SCM - Invoices" you will find the invoices you have created.



Open the respective invoice with the folder symbol in the Menu column and cancel it with the "STORNO (credit note)" button



In the overview, the credit note is marked with a tick in the Credit note column.

Rechnung #	Kundenrechnung #	Interne Rechnungs #	Gutschrift	Bestellnummer
STORNO010715_st2	6010764850		<input checked="" type="checkbox"/>	4500449601
060715_st	6010764846		<input type="checkbox"/>	4500449612
010715_st4	6010764844		<input type="checkbox"/>	4500449602
010715_st2	6010764843		<input type="checkbox"/>	4500449601

4.6. Information system

This chapter describes the use of the information system in the EHS Procurement Portal. The information system provides key figures and reports that can be used by EHS employees and (to a limited extent) also by suppliers.

4.6.1. Overview

The information system provides key figures for controlling processes in the purchasing environment. The data presented in these reports mainly comes from EHS's SAP system and is automatically updated every weekend. In some reports, these SAP key figures are supplemented with data from the EHS Procurement Portal.

In addition to various EHS employees, the information system can also be accessed by suppliers who have permanent access to the EHS Procurement Portal. However, not all reports are available to suppliers and there are limited filter options for the reports visible to suppliers - for example, suppliers cannot carry out evaluations per purchasing group and, of course, each supplier only sees "their" data.

Note: The reports that are not visible to suppliers are marked with an asterisk in the menu tree.