Supply Chain Collaboration Training Guide

Delivery Forecasts and Schedule Response

Updated: April 2024

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1 About this manual

This manual has the purpose to explain the workflow process associated with Delivery Instructions and Schedule Response. INNIO, the buyer, regularly transmits Delivery Forecasts. In response, the seller (Supplier) is expected to provide Schedule Responses.

Throughout this manual, the definitions *buyer* and *seller* will be used to refer to INNIO and suppliers, respectively.

1.1 Definitions

- **Buyer:** INNIO and all related legal entities.
- **Seller:** Suppliers and all companies with whom INNIO conducts business transactions.
- **Delivery Forecasts:** Delivery Forecast is sent based on individual agreements and includes Forecast Schedule lines. Forecast Schedules are provided for forecast purposes only and do not need to be delivered short-term.

A Delivery Forecast contains:

1. Open demands – with the commit level "Backorder"
2. Open demands – with the commit level 'Fix'
3. Long-term demands –-with commit level 'Forecast'

- **Schedule Responses:** Need to be performed by the seller. The forecast needs to be confirmed. Seller can either confirm as the buyer requested, change or even split the delivery date or delivery quantity.

1.2 Typographical and Graphical Conventions

The following typographical conventions are used throughout this manual:

Example	Meaning
Screen Text	Text visible in the user interface is displayed as **bold**.
Reference	References are displayed in *italics.*

The graphical convention is used throughout the manual:

Figure: Red borders are used to indicate special areas. Yellow numbers are used to indicate steps. Those are not part of the UI.

1.3 Abbreviation

Abbreviation	Meaning
ASN	Advance Shipping Notice
EDI	Electronic data interchange
UI	User Interface

2 Introduction

INNIO is proactively embracing the rapidly evolving digital transformation in the business world. In partnership with SupplyOn, the Supply Chain Collaboration tool is strategically designed to unlock the vast potential of this transformation.

SupplyOn is dedicated to a thorough digitization of business processes, amplifying supplier networks throughout INNIO's entire supply chain with a focus on mutual transparency and efficiency.

The following guide explains in detail how suppliers can use the tools Delivery Forecasts and Schedule Response to create an efficient and easy communication between sellers and INNIO.

Figure: Supply Chain Collaboration Processes between INNIO and suppliers.

3 Roles and Rights

Basic information about the current user account, its roles and rights are visible under **My User Account**.
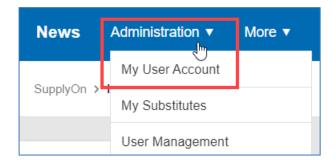

Figure: Access to *My User Account.*

After selecting **My User Account**, basic information like username, e-mail address, etc. will be shown. The information can be corrected in case something is outdated.
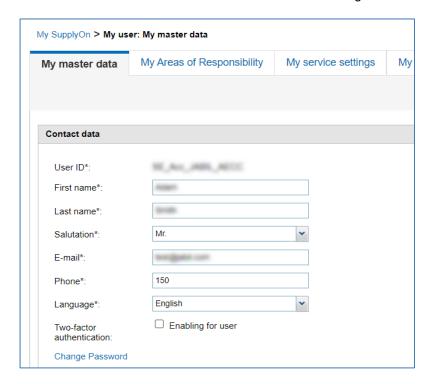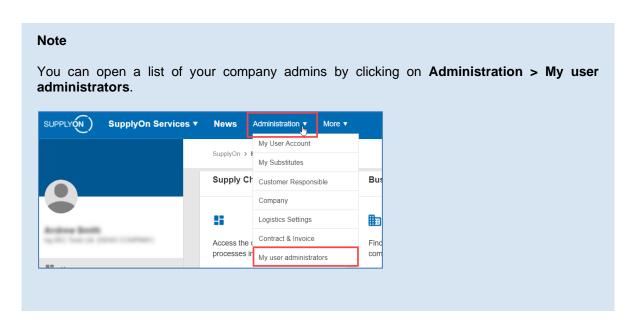

Figure: My User Account overview

Under the tab **My Areas of Responsibility** a list of allowed actions is shown. The authorized actions depend on what roles and rights the current user has been given. The areas of responsibility as well as roles are defined by the *User Administrator*. To request different roles please contact the User Administrator in your organization.

Figure: Areas of responsibility.

> **Note**
>
> You can open a list of your company admins by clicking on **Administration > My user administrators**.
>
>

To perform the activities described in this guide, the following roles are required:

WebEDISellerReleases:

✓ Access to delivery instructions and delivery instruction confirmations.

WebEDISellerSR:

✓ View schedule responses.

WebEDISellerSR_OR:

✓ Edit schedule responses.

At least one of the company users should have the following role:

WebEDISellerAdmin

✓ Extensive authorities over the Supply Chain Collaboration and various, unlocked applications

Depending on whether you were already an existing supplier on SupplyOn or are completely new, the role assignment process differs. For new suppliers an overview with a list of users is shown, click on the button **Edit** in any of the users to access the role assignment overview.
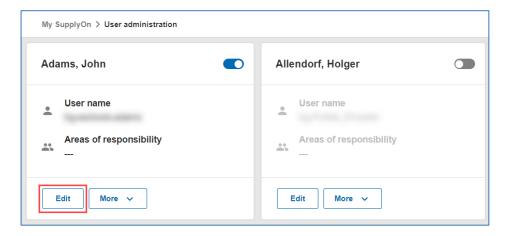

Figure: User administration.

Select the boxes with the red marked options shown in the image below and then click on **Save and close**. These roles will allow you to perform the activities described in this guide.

At least one company user should have the role *Company Administration* (see below in green), to maintain admin functionalities. However, it is important to note that this role is not required to use the functionalities delivery forecast and schedule response.
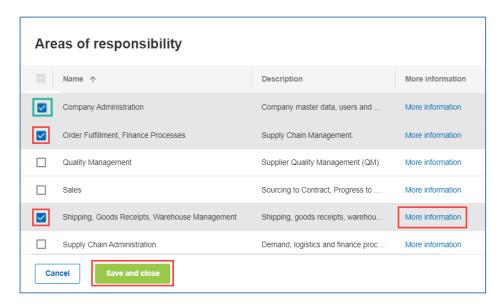

Figure: Areas of responsibility.

After clicking on **More information,** a help page is displayed with an explanation of all the tasks the user can fulfill with this responsibility.

Figure: Roles and rights explanation for the role *Shipping, goods receipts, warehouse management.*

Click on the following links for detailed information on each available role and the functions that can be performed with them:

- Company Administration: https://help.application.prd.supplyon.com/en/node/11725
- Order Fulfillment, Finance Processes: https://help.application.prd.supplyon.com/en/node/11729
- Quality Management: https://help.application.prd.supplyon.com/en/node/11728
- Sales: https://help.application.prd.supplyon.com/en/node/11728
- Shipping, Goods Receipts, Warehouse Management: https://help.application.prd.supplyon.com/en/node/11730
- Supply Chain Administration: https://help.application.prd.supplyon.com/en/node/11726

4 Supply Chain Collaboration

Supply Chain Collaboration is the SupplyOn service, which facilitates the processing of forecasts and deliveries while enabling an efficient communication between seller and buyer.

4.1 Dashboard

Follow these steps to access the Supply Chain Collaboration dashboard:

1. Login to SupplyOn and click on **SupplyOn Services**
2. From the drop-down menu select the option **Supply Chain Collaboration**

Figure: Access Supply Chain Collaboration

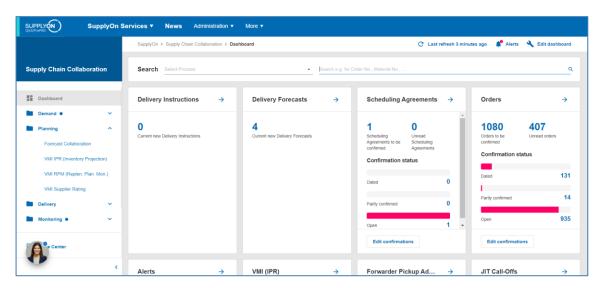3. The **Supply Chain Collaboration** Dashboard is displayed.

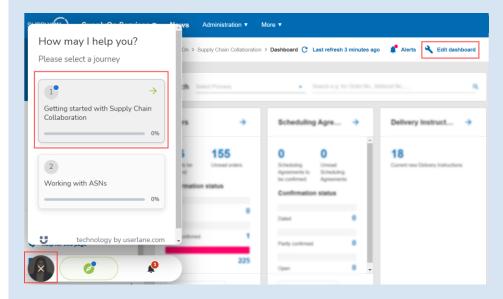**Figure:** Supply Chain Collaboration Dashboard.

The **Dashboard** shows, briefly, all SupplyOn tools available for INNIO services and allows the seller to quickly identify pending orders, deliveries, and other relevant data regarding current business transactions between seller and buyer.

Depending on the roles given to the current user the tiles shown on the dashboard may vary. For more information regarding your roles and rights see Section 3 or contact the User Administrator in your organization.

4.2 Delivery Forecast

4.2.1   Delivery Forecast Overview

Delivery Forecasts are usually sent based on individual agreements in a rolling process and include Forecast Schedule lines. SupplyOn informs sellers automatically via e-mail when a new Delivery Forecast has been created.

To access the Delivery Forecasts Overview, go to Supply Chain Collaboration Dashboard. Click on the **Delivery Forecasts** arrow shown on the dashboard or go to the Navigation Bar on the left-hand side and select the option under **Demand > Delivery Forecasts.**
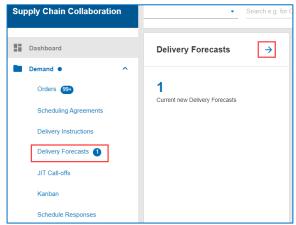

Figure: Access to *Delivery Forecasts.*

You will be directed to an overview where you will see a list of Delivery Forecasts with relevant information being shown on different columns. In the column **Current** you can quickly identify whether a given Delivery Forecast is a current requirement or an outdated one. Current Delivery Forecasts are indicated with a green arrow in the Current column. Please note that only **current** Delivery Forecasts are relevant for the actions indicated in this guide.

Use the column **Confirmation Status** to identify which Delivery Forecasts have already been confirmed and which are still awaiting confirmation.
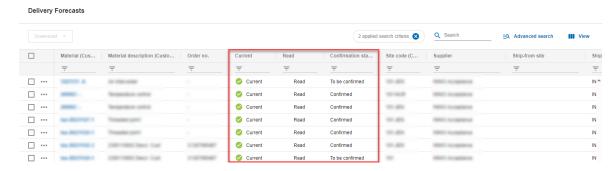

Figure: *Delivery Forecasts* overview.

You can customize the display of columns in the Delivery Forecast overview according to your preferences. To adjust your view, follow these steps:

1. Click on the **View** button to adjust the table view.

2. Pick the columns you want to display or hide. When working with INNIO, it is essential to include the columns **Flex. Field 1**, **Flex. Field 2**, **Flex. Field 3**, **Flex. Field 4**, and **Flex. Field 5**. You can **click on the eye icon** to do so.

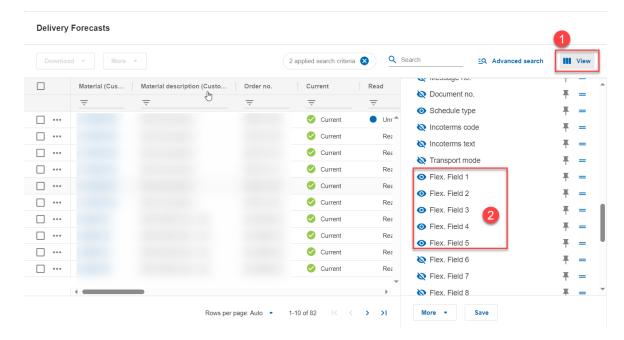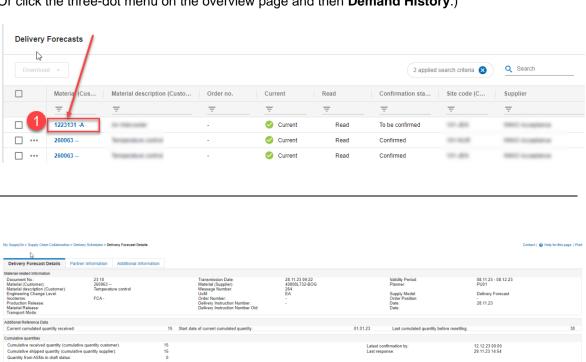**Figure:** *Delivery Forecasts* overview.

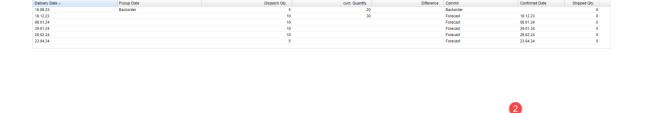The Flex Fields are representing following INNIO-related information:

Flex Field No.	Description
Flex Field 1	Production Line
Flex Field 2	Production Line/ Model/ 1st Spec
Flex Field 3	2nd Spec
Flex Field 4	3rd Spec/ Misc. Info
Flex Field 5	Related Item

To access the historical information associated with a specific Delivery Forecast, first click on the **blue highlighted "Material" attribute (1)** of the desired row. After you have landed on the details screen, simply click on **Demand History (2).**

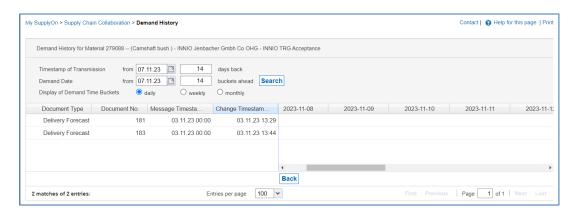(Or click the three-dot menu on the overview page and then **Demand History**.)

Figure: *Demand History* Overview.

Use the **Download** button to save a copy of the Delivery Forecast as a CSV/XLSX file. To do so, follow these steps:

1. Select one or more Delivery Forecasts.

2. Click on **Download.**

3. Select **Download Delivery Schedules.**

4. Select **Default Profile CSV.** You can also adjust the information that is included in the CSV file by using the **Configure Profiles** option.
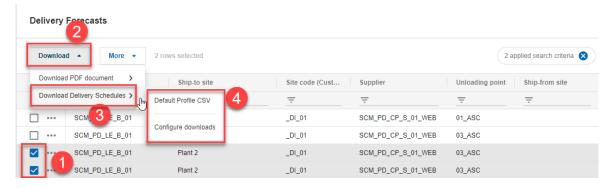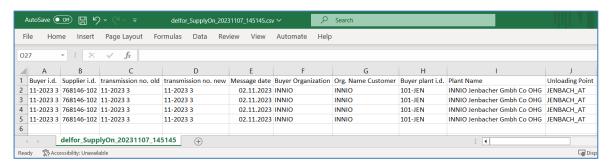

Figure: *Download* as CSV file.

Figure: Downloaded CSV file.

Also use the **Download** button to generate a PDF file with the displayed information on a Delivery Forecast:

1. Choose one or more Delivery Forecasts.

2. Click on **Download.**

3. Click on **Download PDF Document.**

4. Select **Details** or **Documents**, according to your preferences. The PDF document will be downloaded in your browser.
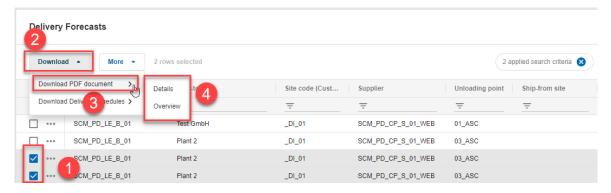

Figure: Download as PDF file.

4.2.1 Delivery Forecast Details Overview

To access detailed information associated with a specific Delivery Forecast, click on the **blue Material number (1)** of the respective row

Figure: Delivery Forecasts Overview.

The **Delivery Forecasts Details** Overview consists of three tabs: **Delivery Forecast Details**, **Partner Information** and **Additional Information**.

The tab **Delivery Forecast Details**, where the main information is shown, is divided in four sections:

1. **Material Related Information**

2. **Additional Reference Data**

3. **Cumulative quantities**:

   - Cumulative received quantities (customer): This is the cumulative quantity received by INNIO.

   - Cumulative shipped quantities (supplier): The supplier can enter a number and save. If this quantity is inferior to the cumulative received quantity, the status will appear as "not ok".

     Please note: Cumulative quantities are not relevant for the overall process.
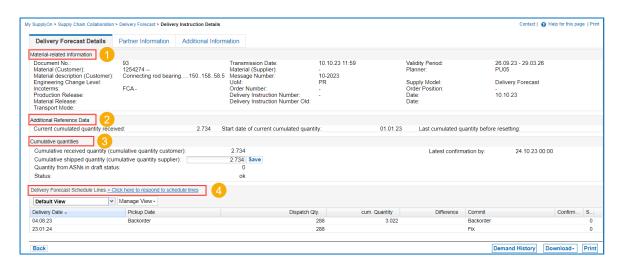
4. **Delivery Forecast Schedule Lines**

Figure: Delivery Forecasts Details Overview.

The column **Commit** shows different status depending on the commitment level of every request:

- **Backorder:** An order could not be filled due to a lack of supply. The delivery date is in the past, but the item has not been delivered yet. Your INNIO-contact might refer to it as PO-Backlog.
- **Fix:** Fixed demand. The seller can regard the customer's request as binding and needs to deliver against the requested quantity and delivery date. Delivery date is in the future. The quantities should equal your open POs excluding backlog.
- **Forecast:** Plan about future needs only for the supplier's information, without commitment by the buyer.

You can also customize the display of columns in the Delivery Forecast Schedule Lines overview to see more information according to your preferences. To adjust your view, follow these steps:

1. Click on the arrow icon located within any of the columns.

2. Select the **Columns** option.

3. Pick the columns you want to display or hide. It is essential to include the column **Schedule Line ID,** this will allow you to see the PO number corresponding to each Schedule Line.
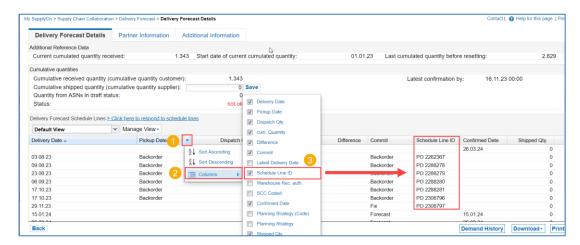

Figure: Delivery Forecasts Schedule Lines view configuration.

4.3 Schedule Response

Confirmation of Delivery Forecasts is done via the **Schedule Response** Overview, which can be accessed using two different methods:

- Via the left-hand side Navigation Bar on the Dashboard (Select **Schedule Responses**):
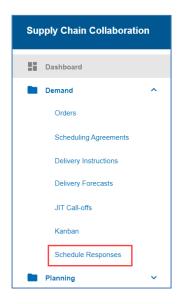

Figure: Access to *Schedule Responses* Overview.

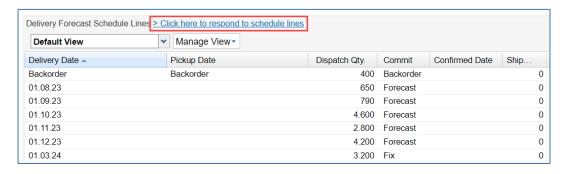- Via the specific Delivery Forecast within the Delivery Forecast Overview

Figure: Access to *Schedule Response* via *Delivery Forecasts Details* Overview.

Please note that only Delivery Forecast with the Commit status *Forecast* can be confirmed via Schedule Response.

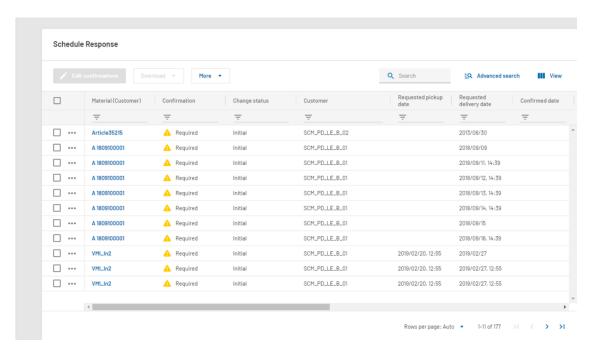After following either of the two methods, the Schedule Response Overview will be shown:

Figure: Schedule Response Overview.

4.3.1 Confirming a Schedule Response per Material

For confirmation of **Delivery Forecasts**, the following columns in the **Schedule Response** overview must be reviewed:

Figure: Schedule Response Overview columns.

- **Requested delivery date**: Requested delivery date by the buyer.
- **Requested qty.:** Requested delivery quantity by customer (Buyer).
- **Confirmed date:** pre-filled during editing with the Requested delivery date.
- **Confirmed qty.:** Confirmed quantity sent by the seller. Pre-filled during editing with the requested quantity.
- Last confirmed date, Last confirmed qty.: Date and Quantity information will be displayed under these columns once a delivery forecast update has been sent by INNIO. Previously confirmed Schedule Lines for the same material will be excluded from the screen.
- **Confirmation date:** Information displayed once the response is transmitted.

Once information has been reviewed, the confirmation can be done by using the buttons in the three-dot menu of each row, or using the buttons above the table:
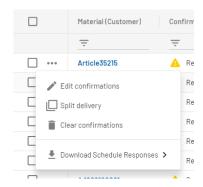
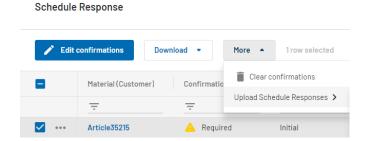**Figure:** Schedule Response buttons in three-dot menu.

Figure: Schedule Response buttons above the table.

1. **Edit confirmation:** The delivery quantities can be edited and reviewed. Once they have been reviewed, the selected schedule lines are ready to be sent to the customer (buyer). To send the confirmation, click on "Send confirmations" below the table.

2. **Split delivery:** Quantity split, for example, the requested schedule line quantity will be divided among multiple delivery dates.
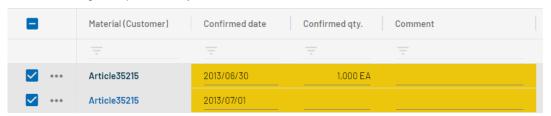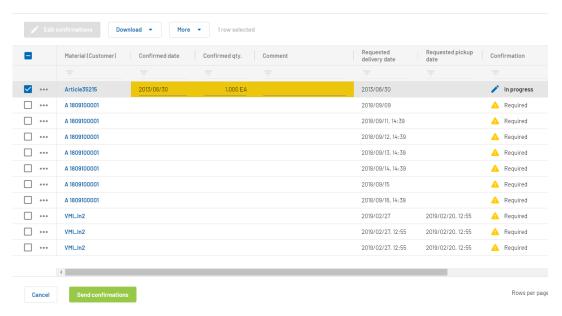

Figure: Split row.

3. **Clear confirmations**: Deletes the confirmed quantities for selected row(s).

After clicking on "Send confirmations" the confirmation will be sent to the customer.

The column **Cumulated deviation** shows the cumulated deviation of the requested/confirmed quantity for the entire time frame. It is calculated as a cumulated requested quantity minus confirmed quantity.

4.3.2   Confirming a Schedule Response via Down-/Upload

1. **Download:** Download Schedule Response template as CVS/XLSX file. By selecting the option **Configure profiles**, you can modify the data that is displayed in the default download template.
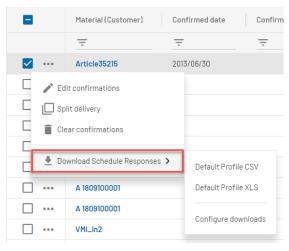

Figure: Download options.

Figure: Downloaded file.

Please note that the downloaded file can be modified by you as a user upfront according to your needs. Find out [here](#) further information.

2. **Upload:** Schedule Responses can be confirmed by uploading the edited CSV/XLSX file: Once downloaded, you can manually modify the confirmed dates/quantities (shown in green on top) and upload the file to into the web application.
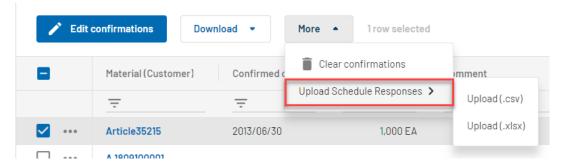

Figure: Upload options.

Select the corresponding file in the upload window. After clicking on "Upload" the message is transmitted to the customer (buyer).
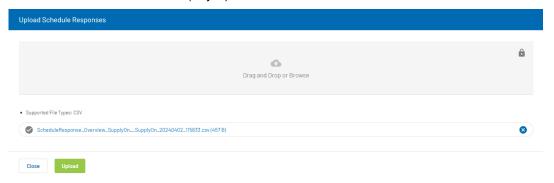

Figure: Upload window

5 Creating a Personalized View

In this section you will learn how to create a personalized view and set it as default view.

As a SupplyOn user, you have the possibility to organize the contents of most of the tables the way you prefer, in order to facilitate your work. To do this, you have two possibilities: change your view directly in the table or via the **View** option**.**

5.1 Change of the View within the Table

You can use the following functionalities:

- **Change the order** of columns by clicking on the respective column with the left mouse key, holding the left mouse key pressed and moving the curser to the desired position of the table
- **Change the width** of columns by clicking on the column boarder with the left mouse key, holding the left mouse key pressed and moving the curser to the desired width of the table
- **Autosize This Column/ Autosize All Columns:** these options are available under the menu of each column. Click on one of these options to reset the width of either on specific column or all columns
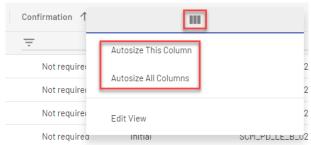

Figure: Autosize This Column/ Autosize All Columns

5.2 The View Menu

You can access the advanced view via the button in the right corner of the table or via the button "Edit view" in each of the menus of the columns.
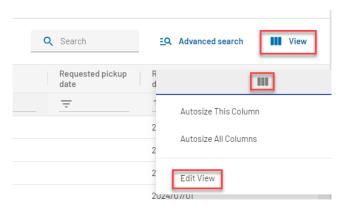

Figure: Access Advanced View

Here, following functions are available:

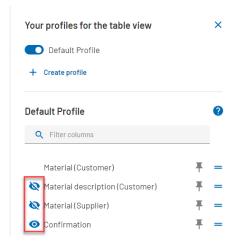- **Hiding columns:** Click on the eye symbol on the left of each column header to hide (or show) columns.

Figure: Hide and show columns

Click on **Suppress hidden columns** to hide those columns from the list and **show hidden columns** to list them again.

Figure: Suppress hidden columns

- **Moving columns:** you can drag and drop a column by clicking on the two lines on the right, moving the column up or down while maintaining the click and releasing the click when the column is at the place you wish.
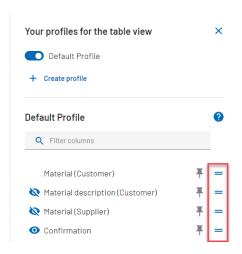

Figure: Change order of columns

- **Pin columns:** To pin a column to the beginning of the table, click on the pin symbol to the right.
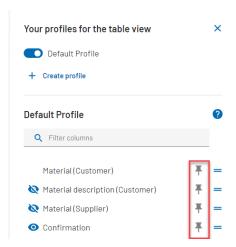
Figure: Pin a column

- **Filter for columns:** If you are searching for a specific column, in order to perform one of the above functions, use the filter function.
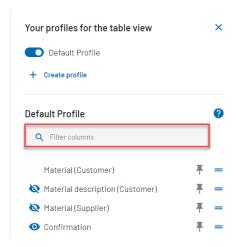

Figure: Filter for columns

- **Create profile:** you can create and save own views by creating a profile. For this, click on **Create profile**, adjust the table according to you wishes, give it a name and **Save** the view. Switch between different views by clicking on the switch button next to the view profile name.
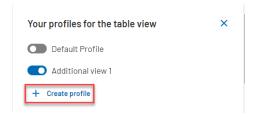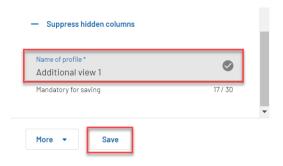

Figure: Create profile

Figure: Naming and saving of view profile

- **More button:** click on the More button to find the functionalities **Restore initial setting, Copy and Delete.**
    - o **Restore initial settings** will set the profile to default view
    - o **Copy** will create a copy of the view profile
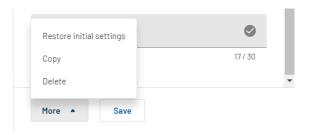   - o **Delete** will remove the view profile

Figure: More button

6 FAQs and SupplyOn Contact

✓ **Forgot password?**

You can get a new password at any time.
Therefore you need your user ID and your e-mail address.
You get an e-mail including a link you must click within the next 24 hours.
Subsequently you get directed to a website to specify your new password.
You can start the process here.

✓ **Forgot User ID?**

You can get notified about your user ID at any time.
Therefore, you need your first and last name and your e-mail address.
You will receive an e-mail with your current user ID.

Important:
The e-mail address, first and last name must be stored at SupplyOn.
Your spam filter must not block the e-mail.

Get your user ID here.

✓ **"I need more roles or rights!"**

There is at least one user administrator for each company using the SupplyOn services.
Only this administrator can create users or manage roles and rights.
You can find a list of the user administrators of SupplyOn in your company in the menu
"administration", option "My user administrators".

Further frequently asked questions can be read here.

Detailed information regarding the SO applications and navigation on the UI is provided on the SO media library.

Contact formular for further SupplyOn services: https://contact.supplyon.com/en/

- Worldwide support in 9 languages (English, German, French, Spanish, Portuguese, Italian, Chinese, Japanese, Korean)
- 365 days/24 hours available