

Operating Manual for Suppliers

Using

Heidelberger Druckmaschinen AG

Supplier Portal

Quality Processes, RFQ (Inquiry/Quotation) and
Document Exchange (Teamroom)

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1 Preface

The internationally leading manufacturer of industrial presses for the sheetfed offset printing sector is introducing POOL4TOOL to streamline its business processes in the quality engineering and procurement areas. 8D reports, First article reports, *Goods movement document* and special releases, along with quotations and the general exchange of documents, are displayed in the web-based Supplier Portal, which is fully integrated into Heidelberg's SAP environment. The uninterrupted synchronization of the material and supplier master data as well as the mapping of a vast number of processes enables the business processes to be optimized in a sustained manner.

As a manufacturer of technologically sophisticated products, Heidelberg attaches a great deal of importance to the quality of cooperation with both existing and potential suppliers. POOL4TOOL provides electronic support for a multitude of processes involved in the areas of procurement and quality management. This means that First article reports-orders from the ERP system are automatically sent to POOL4TOOL where they are then filed in a worklist. Suppliers can then upload the First article reports and all the relevant documents into the Portal that are to be sent straight back to SAP following release by Heidelberg.

In the long-term all complaints are to be processed using POOL4TOOL. Suppliers can use WebEDI to view customer complaints, 8D and 3D reports in the Portal as well as to record simple statements online and then report them immediately to the customer's SAP system. All the complaints, including the POOL4TOOL reminder counter, will be sent to the ERP system. The information on sent reminders runs as an additional criterion in SAP and it can be included in the supplier assessment.

The quotation process to HEIDELBERG is also processed using the Supplier Portal. Quotations can be recorded by the supplier and then read into the SAP system by Heidelberg without any delay, where they are then processed. Documents relating to inquiries / quotations are sent securely through the Portal – protected against access from third parties.

Workflow Based Processes in Quality Environment

Suppliers can use POOL4TOOL to request special releases for parts, the quality of which deviates from the given specification, but which will not actually impair the correct usage of the end product. The Quality Assurance Manager shall check the data at the Portal and compile a quality notification, which can then be processed on a workflow basis. The final status is then sent back to the Portal and made accessible to the suppliers. Another special feature is that of the individually provided interface for shipping department documents for certification of the quality inspection conducted by the supplier. Suppliers have the option here to send them through the Portal to Heidelberg. Following a successful plausibility check by the Quality Manager in charge, the data are attached straight onto the matching SAP business object.

"We regard first-class quality processes to be of major significance for our company, this is why we also place similarly high demands on the products and services provided by our suppliers. The electronic support provided by POOL4TOOL enables us to make our quality management even more efficient, while also allowing us to align it with the latest international standards", explained Christian Funk, Project Manager for the Portal at Heidelberg.

2 Preparation

2.1 Opening Pool4Tool

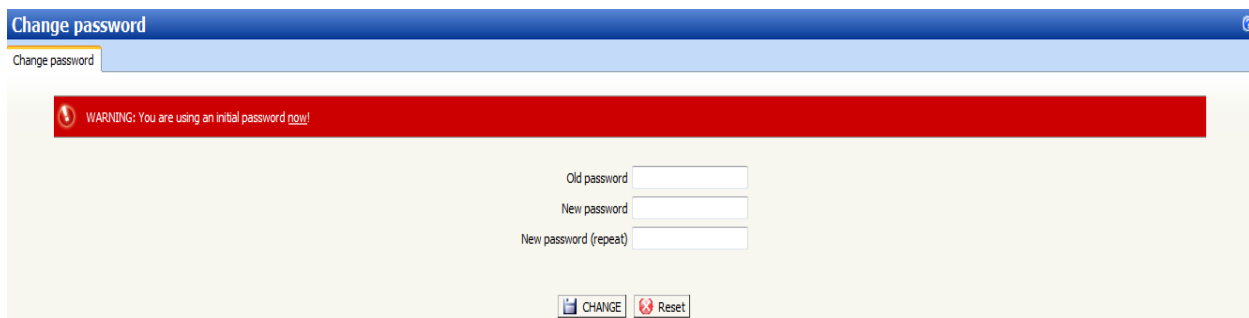
To log into POOL4TOOL, open your web browser and go to <http://supplierportal.heidelberg.com>

Here is the default Log in mask, into which you have to enter your user name and your password.



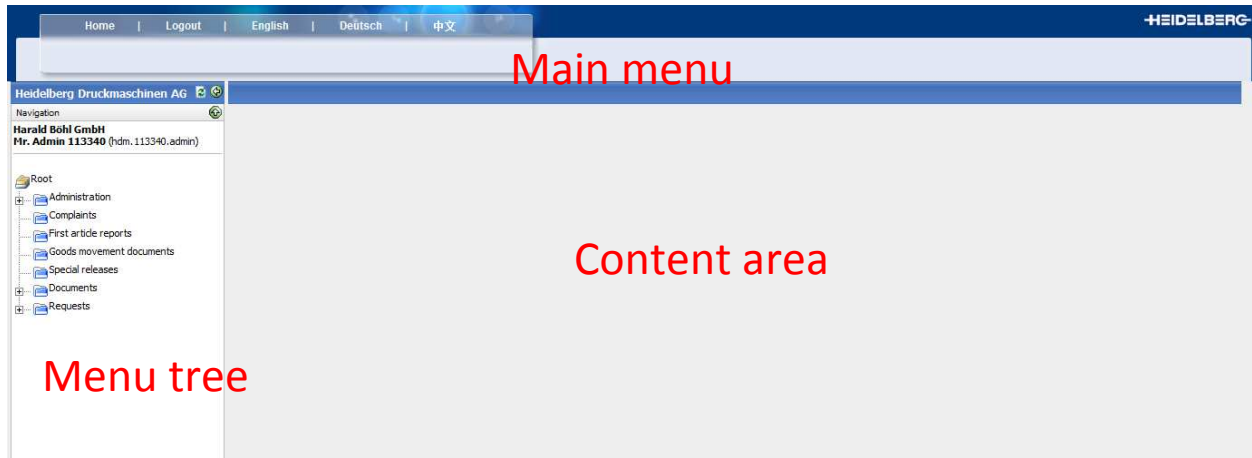
The image shows a login form for Heidelberg. At the top, the word "HEIDELBERG" is written in a large, blue, stylized font. Below the logo, there are two input fields: "Username" and "Passwort". Below these fields is a blue "Login" button. At the bottom of the form, there is a small text line: "Powered by POOL4TOOL V4 – © 1999-2009 Selected Services GmbH".

When logging in for the first time, you will be warned that you are using an initial password and that you use shall have to change it after you have logged in for the first time. To do so, enter the current password and then the new password two times in succession into the fields provided, and then confirm with the *CHANGE* button. Once you have changed the password you will have to log out and then log in again.



The image shows a "Change password" form. At the top, there is a blue header with the text "Change password". Below the header, there is a red warning bar with a warning icon and the text "WARNING: You are using an initial password now!". Below the warning bar, there are three input fields: "Old password", "New password", and "New password (repeat)". Below these fields, there are two buttons: "CHANGE" and "Reset".

When you have logged in again you will see the following image:



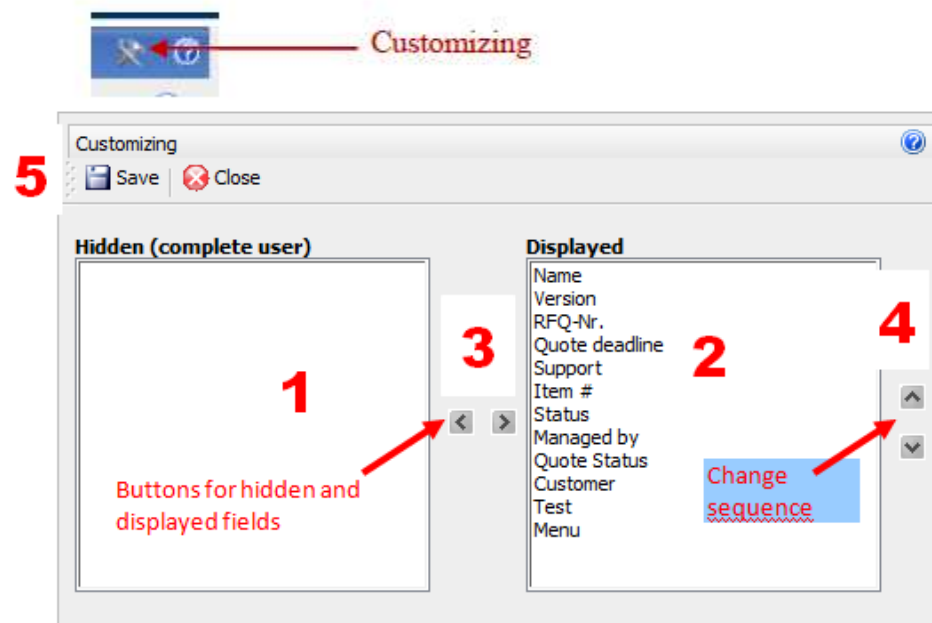
3 General Operation

Entries are displayed in categorised form in list views on several pages. If there is more than one page, several buttons are displayed in the upper right area of the list, at the left next to the filter symbol, which can be used to navigate between the pages .



3.1 Customizing

You will see the following symbol in many areas of POOL4TOOL: It means that the current view can be configured to suit your own personal requirements. This symbol is usually located in the upper right area of a list.



These two lists show all the fields that can be used in your current view.

1+2: The fields on the left-hand side are not visible, whereas those on the right-hand side are visible.

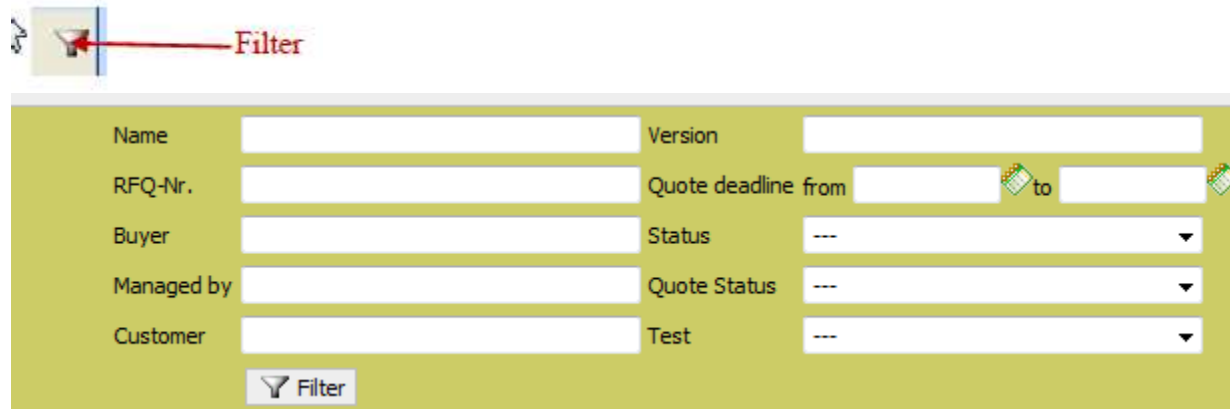
3: To change the current settings, select one or more fields and use the buttons in the centre to shift the fields between "Hidden" and "Shown".

4: Use the two buttons on the right-hand side to change the sequence of fields.

5: Click on the *Save* button once you are finished, and the current page is then loaded with the settings you have made. If you do not wish to save the settings, close the window.

3.2 Filter

In most of the lists in POOL4TOOL it is possible to filter the displayed entries. When this option is available you will see a filter symbol in the upper right of the area.



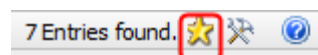
The screenshot shows a filter interface with a red arrow pointing to a filter icon in the top right corner, labeled "Filter". Below the icon is a form with the following fields:

Name	<input type="text"/>	Version	<input type="text"/>
RFQ-Nr.	<input type="text"/>	Quote deadline from	<input type="text"/> to <input type="text"/>
Buyer	<input type="text"/>	Status	--- <input type="button" value="v"/>
Managed by	<input type="text"/>	Quote Status	--- <input type="button" value="v"/>
Customer	<input type="text"/>	Test	--- <input type="button" value="v"/>

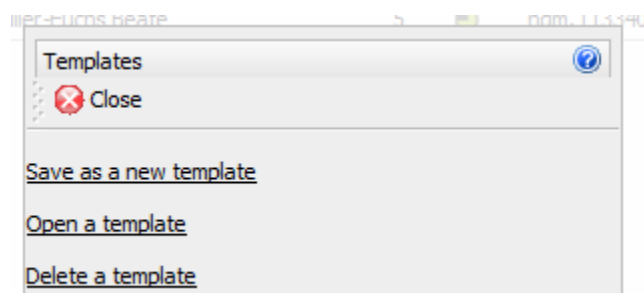
At the bottom of the form is a button labeled "Filter" with a funnel icon.

Once you have entered the filter criteria according to which you wish to run the filter, click on *Filter* in the lower section of the filter area. The current view is loaded again and it now only shows those entries that match the filter criteria.


3.2.1 Saving Filter Settings

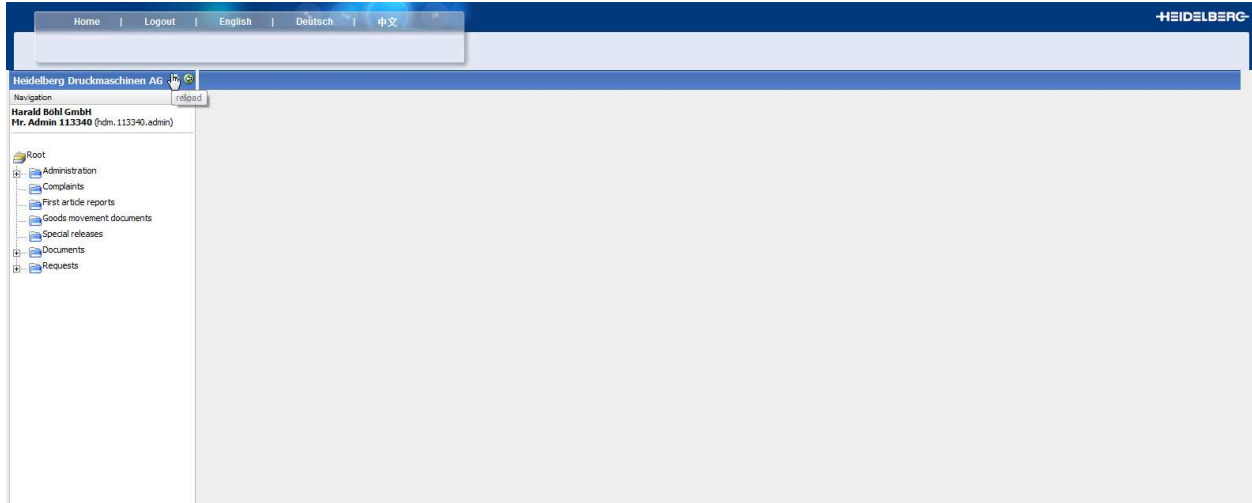


Clicking on the star symbol enables the current filter setting to be saved as a template and it can be called up again.




3.3 Changing to Home Page

You can use the  button to call up the Home page:



The display may vary in certain instances depending on the particular browser you are using and the actions you carried out last.

3.4 Help

Help is available at .

4 Quality Processes

The following quality processes are available in the menu tree:



Information is automatically sent per email for all relevant actions. A link is embedded into the email, which enables a jump to be made straight to the document concerned.

4.1 Complaints

In this process you can work through the complaints from Heidelberg and receive information regarding initial sample releases.

Choose the entry "Complaints". The information area contains all the customer complaints along with the initial sample releases with details on the title, complaint number, process status and lots more.

The fields on display can be edited as described in Customizing.

Initial samples are denoted by the test mode 0101 or 0103.

The column view can be altered by each user to suit individual requirements. (See 3.1 Customizing)

Note: The "8D Status" and "8D Step" (8D Status" and "8D Schritt) columns are irrelevant and should be hidden from view.

Suggestion for relevant columns.




Ext. complaint no.	Material no.	Title	Process status	Step	Causer	VE Code	Check type	Created	Created by	Modified	Modified by
--------------------	--------------	-------	----------------	------	--------	---------	------------	---------	------------	----------	-------------

Click on it to open a complaint or an initial sample release.

Information on the procedure is provided in a new window:

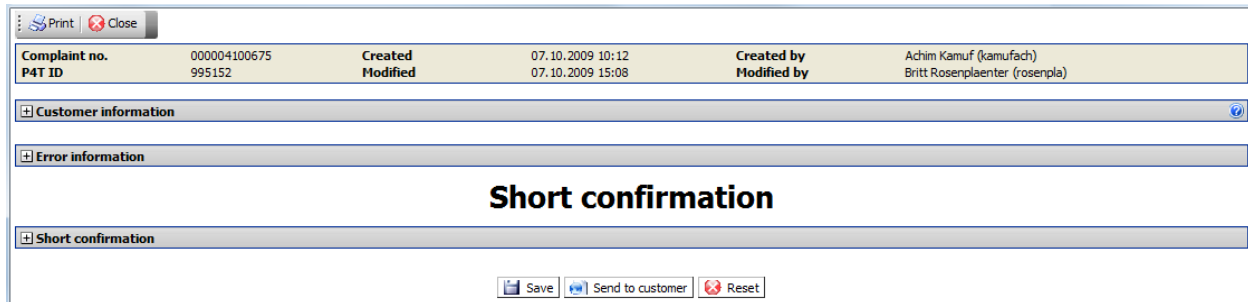
Ext. complaint no.	Material no.	Title	Process status	Step	Causer	VE Code	Check type	Created	Created by	Modified	Modified by
000008113202	69090915	Abdeckblech	●●●●	Supplier comment		VR	Z3	04.02.2010 10:44	Kamuf Achim	07.09.2010 11:52	Test User
000004097187	LS.142.2012/06	Leitungssatz Vorl.+End LW	●●●●	Check comment		ER	0101	20.11.2009 11:07	Kamuf Achim	26.08.2010 12:50	Test User
000008097501	7G.656.0510/01	Schleppkette komplett	●●●●	for information		VR	Z3	02.11.2009 14:58	Kamuf Achim		rman_cmp_982 vman_c
000004105379	7G.105.0010/	Stellantrieb GR63x25 PLG52h i=225	●●●●	Supplier comment		VR	01	19.10.2009 12:34	Kamuf Achim	18.11.2009 12:17	Test User
000004105386	7G.033.349 /	Schenkefeder	●●●●	Supplier comment		VR	01	19.10.2009 11:48	Kamuf Achim	19.10.2009 13:22	Test User
000004105375	00.783.0138/	Sensor MAGN PROX	●●●●	Supplier comment		VR	01	19.10.2009 11:48	Kamuf Achim	19.10.2009 13:28	Test User

Meaning of "Process Status"

-  "For information" or "Finished"
-  "Check comment" or "Supplier comment" in event of repeat processing
-  "Supplier comment" for initial process

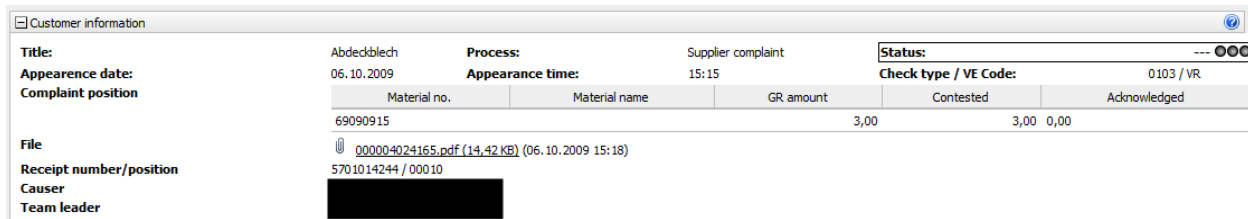
Meaning of "Step" Column

- "For information" Information about a complaint or an initial sample decision, without any feedback required from HDM
- "Statement comment" A complaint from HDM which requires feedback and which has not yet been processed by the supplier or not yet sent to HDM
- "Check comment" HDM is checking the feedback from the supplier
- " Finished" The feedback from the supplier has been accepted by HDM and the complaint process has been completed



Customer information contains HEIDELBERG information on the complaint and you can open attachments such as the HEIDELBERG inspection report. The VE Code (Usage Decision) is used to conduct the application decision as made by HEIDELBERG. The following options are available:

VE Code	Meaning
EF	First article approved
EA	First article approved with condition
ER	First article rejected
KF	no defect found
UE	Put into storage unchecked
VR	Defect, Lot will be rejected



The Error information area displays the approval decision, errors, quantity and the type of expected answer.

Entering Error Features ("Supplier Decision")

The "Supplier decision" field is pre-assigned with the error feature detected by HEIDELBERG. If the actual error deviates from this value, a corresponding feature **must** be selected from the catalogue provided. (The feature is used by HDM for statistical sampling)

The screenshot shows a form titled "Error information" with the following fields and values:

- Priority (1 = high, 10 = low): 6
- Error description: Error categorisation
- Required response: Statement

Origin	Category 1	Description	Amount	Supplier decision
RL	Information		1,00	attention information
RL			1,00	

Response type	Answer expected until	Step	Finished until
Statement	14.10.2009		

The priority indicates the urgency associated with the reply. Priority 1 indicates a high level of urgency, priority 10 a low level.

All complaints with **Priority 1 are escalation topics** and must be responded to with a **statement within a period of one week**.

Generally, the following maximum response time applies, depending on the priority:

Priority	Response time
01	Within 1 week (Escalated complaint)
02	Within 2 weeks
03	Within 3 weeks
04	Within 4 weeks
05	Within 5 weeks
06	Within 6 weeks
07	Within 7 weeks
08	Within 8 weeks
09	Within 9 weeks
10	Within 10 weeks

Reminders

If the response time (Response expected by) is exceeded, a reminder is immediately sent per email; this is cyclically repeated and included as part of the supplier assessment.

The complaint is processed in the "Short confirmation" area.

The screenshot shows a form titled "Short confirmation" with the following fields and controls:

- Statement*: A dropdown menu with a "-" symbol.
- Comment: A large text area with a cursor.
- Files: A search bar with "Durchsuchen..." and a dropdown menu showing "Reklamation". Below it is an "Add file" button.

In Statement choose

- Accepted
- Deny
- Preliminary or
- Goodwill

from the list.

Preliminary

- The complaint process is taking longer than agreed upon. An extension to the processing completion date is applied for. The required extension to the completion date must be entered into the comment field. The decision is taken by the quality employee in charge at HDM.
→ The "Answer expected until" field is then adapted to suit.

Accepted (Costs borne by the supplier - Parts enter the quality statistics)

- The part exhibits a reproducible error which is the responsibility of the supplier.

Goodwill (Costs borne by the supplier - Parts do not enter the quality statistics)

- The part exhibits a reproducible error which is NOT the responsibility of the supplier.
- The part exhibits a reproducible error which is the responsibility of the supplier, but it is outside the warranty period.
- Supplier recall campaign
The charge for the return delivery is retained. The repair order is conducted free of charge.

Deny (Voucher is issued - Parts do not enter the quality statistics)

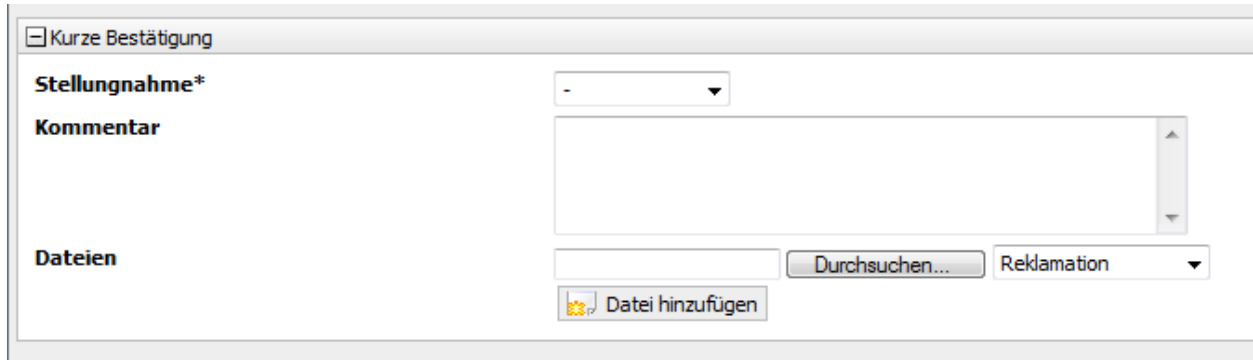
- The complaint is not justified.

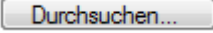
If you accept a complaint, and there is a deviation in the faulty quantity, you can make a correction in the "Error information" area in the "acknowledged" field.

0101 / ER

Acknowledged
1,00

In "Files" attachments such as statement, test charts, etc. can be inserted for sending to HEIDELBERG.

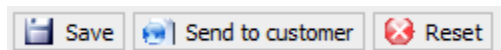


In the field at the right next to "Search"  you have to enter the type of document. When doing so, you must differentiate as to whether the file attachment is a complaint document (Reklamation) or an email (Mailverkehr extern). A **File attachment** (Statement) that is a (Reklamation) document type is **mandatory**. (Exception for Preliminary statement)

You can enter a comment in the "Comment" field.

Finish or Save

- | | |
|-------------------|--|
| Save: | The entered data are saved, a notification is not sent to HDM
→ no change in the process status |
| Send to customer: | The entered data are saved, a notification is sent to HDM
→ change in the process status |
| Reset: | Changes are cancelled. |



4.2 First article reports

In this process you can process the first article report as required by Heidelberg.

Choose the entry "First article reports" in the menu tree. The information area displays all the initial sample reports along with details on reference number, material number, material designation and lots more.

The fields on display can be edited as described in Customizing.

Lines with a score through them are regarded to have been deleted and need no longer be processed.

Mr. User Test (hdm.demoleferant)

Reference number	Order number	Position	Material number	Material	Partner	Created	Status	Created by	Modified	Modified by	Commodity
4503679807_00020	4503679807	00020	002500443	Kegeeling 404.611	Heidelberger Druckmaschinen AG	11.03.2009 12:02	●●●	data exchange	11.03.2009 17:16	admin hdm	LubrSyst.Joints,Fitt
4503737492_00010	4503737492	00010	00.580.6675/	Leitungsmarkierung PA-30006AV40.9	Heidelberger Druckmaschinen AG	14.07.2009 14:14	●●●	admin hdm	14.07.2009 14:39	User Test	Elec. Install. Mat.
4503737493_00010	4503737493	00010	00.580.6675/	Leitungsmarkierung PA-30006AV40.9	Heidelberger Druckmaschinen AG	14.07.2009 14:52	●●●	data exchange	14.07.2009 15:01	User Test	Elec. Install. Mat.
4503737494_00010	4503737494	00010	00.580.6675/	Leitungsmarkierung PA-30006AV40.9	Heidelberger Druckmaschinen AG	14.07.2009 16:26	●●●	data exchange	03.03.2010 12:25	User Test	Elec. Install. Mat.
4503737543_00010	4503737543	00010	00.783.0138/	Sensor MAGN PROX	Heidelberger Druckmaschinen AG	11.09.2009 10:19	●●●	data exchange	12.04.2010 11:43	User Test	Inductive Sensors
4503737559_00010	4503737559	00010	7G.033.349 /	Schenkelfeder	Heidelberger Druckmaschinen AG	11.09.2009 10:49	●●●	data exchange			TorsSpri/Helic.Spri.
4503737551_00010	4503737551	00010	7G.105.0010/	Stellantrieb GR63x25 PLG52s I=225	Heidelberger Druckmaschinen AG	11.09.2009 10:33	●●●	data exchange			DCDrvGb_ExtElecExit
4503737555_00010	4503737555	00010	7G.146.6111/01	Flachengabe GGF Anl.Sprecharl.B5	Heidelberger Druckmaschinen AG	11.09.2009 10:41	●●●	data exchange			ShortTravelKeyboards

Status



First article report completed



First article report not yet completed

Open the corresponding requests for processing the HEIDELBERG First article reports by clicking on them.

The content area now contains information on the request:

First article report

Back Save Send

First article report for order 4503737559 Position 00010

Status: ●●● New

Requested by: Heidelberger Druckmaschinen AG

Requested at: Testlieferant 100025

Commodity: 130303010 TorsSpri/Helic.Spri.

Material: 7G.033.349 /

Amount: 1,00

Delivery date: 06.11.2009

Reminder date: 03.11.2009

Responsible person: -

Description:

Files*:

Durchsuchen...
Erstmusterprüfbericht extern ▼

Add file

Reminder Date: This date depends on the order's delivery date (3 workdays beforehand). If the reminder date is exceeded, a reminder is immediately sent out per email, which is then repeated cyclically.

The order delivery date and reminder date can only be edited by the person responsible for the order (Purchasing/Job Planning). Please contact them in the event of any delays.

In "Files" attachments such as statement, test charts, etc. can be inserted for sending to HEIDELBERG.


Description:

Files*:

Enter file name with path or use Search (Durchsuchen) to select a file

Select type of attachment




To attach more than one file use the Add file button.

Use  to delete a file.

You can enter a notification in the "Comment" field.

First article reports must be integrated using the "Erstmusterprüfbericht extern" type of document.

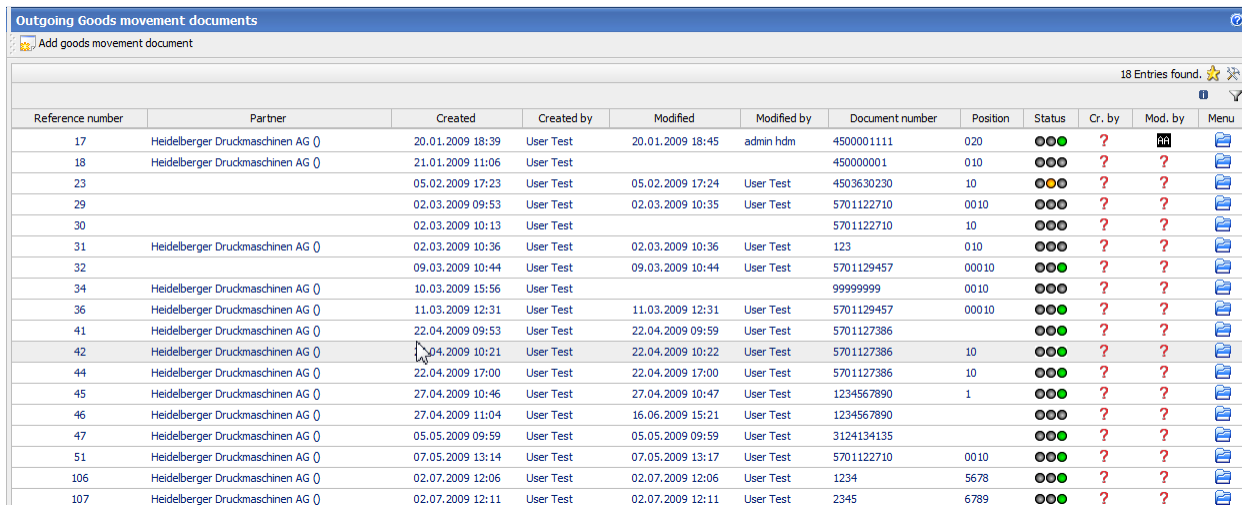
All report-relevant files must be attached using Files.

Your entries can now be ,  or deleted using the  button.



















4.3 Goods movement documents

You can send the Goods movement document here such as test charts, certificates, etc. in coordination with Heidelberg.

Choose the entry Goods movement documents in the menu tree. The information area displays all the currently sent Goods movement documents. The fields on display can be edited as described in Customizing.



The screenshot shows a table titled "Outgoing Goods movement documents" with 18 entries. The table has columns for Reference number, Partner, Created, Created by, Modified, Modified by, Document number, Position, Status, Cr. by, Mod. by, and Menu. The data is as follows:

Reference number	Partner	Created	Created by	Modified	Modified by	Document number	Position	Status	Cr. by	Mod. by	Menu
17	Heidelberger Druckmaschinen AG ()	20.01.2009 18:39	User Test	20.01.2009 18:45	admin hdm	4500001111	020	●●● ?	?	?	
18	Heidelberger Druckmaschinen AG ()	21.01.2009 11:06	User Test			450000001	010	●●● ?	?	?	
23		05.02.2009 17:23	User Test	05.02.2009 17:24	User Test	4503630230	10	●●● ?	?	?	
29		02.03.2009 09:53	User Test	02.03.2009 10:35	User Test	5701122710	0010	●●● ?	?	?	
30		02.03.2009 10:13	User Test			5701122710	10	●●● ?	?	?	
31	Heidelberger Druckmaschinen AG ()	02.03.2009 10:36	User Test	02.03.2009 10:36	User Test	123	010	●●● ?	?	?	
32		09.03.2009 10:44	User Test	09.03.2009 10:44	User Test	5701129457	00010	●●● ?	?	?	
34	Heidelberger Druckmaschinen AG ()	10.03.2009 15:56	User Test			99999999	0010	●●● ?	?	?	
36	Heidelberger Druckmaschinen AG ()	11.03.2009 12:31	User Test	11.03.2009 12:31	User Test	5701129457	00010	●●● ?	?	?	
41	Heidelberger Druckmaschinen AG ()	22.04.2009 09:53	User Test	22.04.2009 09:59	User Test	5701127386		●●● ?	?	?	
42	Heidelberger Druckmaschinen AG ()	22.04.2009 10:21	User Test	22.04.2009 10:22	User Test	5701127386	10	●●● ?	?	?	
44	Heidelberger Druckmaschinen AG ()	22.04.2009 17:00	User Test	22.04.2009 17:00	User Test	5701127386	10	●●● ?	?	?	
45	Heidelberger Druckmaschinen AG ()	27.04.2009 10:46	User Test	27.04.2009 10:47	User Test	1234567890	1	●●● ?	?	?	
46	Heidelberger Druckmaschinen AG ()	27.04.2009 11:04	User Test	16.06.2009 15:21	User Test	1234567890		●●● ?	?	?	
47	Heidelberger Druckmaschinen AG ()	05.05.2009 09:59	User Test	05.05.2009 09:59	User Test	3124134135		●●● ?	?	?	
51	Heidelberger Druckmaschinen AG ()	07.05.2009 13:14	User Test	07.05.2009 13:17	User Test	5701122710	0010	●●● ?	?	?	
106	Heidelberger Druckmaschinen AG ()	02.07.2009 12:06	User Test	02.07.2009 12:06	User Test	1234	5678	●●● ?	?	?	
107	Heidelberger Druckmaschinen AG ()	02.07.2009 12:11	User Test	02.07.2009 12:11	User Test	2345	6789	●●● ?	?	?	

To send new Goods movement document click on the  button.

You can enter all the data required for the Goods movement document in the following screen.

Recipient

Heidelberger Druckmaschinen AG is always entered here and it cannot be changed.

Document number*:

(Delivery plan or order number)

Enter the number for the delivery schedule or order number here.

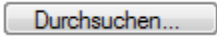
Position*:

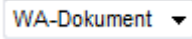
Enter the position number here.

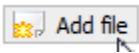
Description:

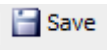

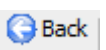
You can enter a description for the Goods movement document here.

Files*:

Here, you can enter the file name for the document to be sent or select a file by using the "Search"  button.

The field "Goods movement document"  is populated with a default value and it cannot be changed.

To attach another file click on the  button.

Your entries can now be , , or deleted using the  button.

4.4 Special releases

In this process you must apply to Heidelberg for special releases and you can monitor the status of the process.

Choose the entry Special releases in the menu tree. The information area displays all the currently sent special release applications. The fields on display can be edited as described in Customizing.

CAUTION!

To avoid any irritations, adapt your columns to suit by **removing** the "Status" column and then **inserting** the "Customer decision" column.

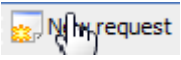
The "Customer decision" indicates the actual status of the special release. (This is shown in the overview by moving the mouse pointer over the traffic light in plain text or after opening the special release in line 2).

Outgoing requests

New request

Special releases 28 Entries found. - Filtered

#	Q number	Material number	Material name	Customer decision	Created	Created by	Partner	Amount	Start at	Menu
57		123123	test	●●●	07.07.2009 11:58	User Test	Heidelberger Druckmaschinen AG	12,00	14.07.2009 00:00	
60		123123	asd	●●●	09.07.2009 14:47	User Test	Heidelberger Druckmaschinen AG	1,00	09.07.2009 00:00	
73		1		●●●	15.07.2009 18:08	User Test	Heidelberger Druckmaschinen AG	1,00	15.07.2009 00:00	
4		91008133	Stift...	●●●	06.05.2009 15:58	User Test	Heidelberger Druckmaschinen AG	10,00	11.05.2009 00:00	
127	000010021605	SB.314.308 /	Bolzen	●●●	15.10.2009 17:13	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
129	000010021606	PL.605.4293/	Einschraubanschl. 3699 14 21	●●●	15.10.2009 17:17	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
158	000010025242	00.783.0677/01	sensor	●●●	02.03.2010 16:10	User Test	Heidelberger Druckmaschinen AG	10,00	04.03.2010 00:00	
161	000010025283	00.760.0487/	10L-ÖLKANNE AUS STAHLBLECH VERZINKT	●●●	08.10.2010 15:41	Benutzer 100025	Heidelberger Druckmaschinen AG	100,00	11.10.2010 00:00	
2		00.783.0560/	Hustengutssel	●●●	22.04.2009 11:09	User Test	Heidelberger Druckmaschinen AG	1.000,00	27.04.2009 00:00	
92		123123123	test	●●●	26.08.2009 15:11	User Test	Heidelberger Druckmaschinen AG	1,00	27.08.2009 00:00	
113	000010021610	00.783.0138/	Sensor	●●●	11.09.2009 21:57	User Test	Heidelberger Druckmaschinen AG	10,00	14.09.2009 00:00	
116		7G.146.6111/01	Flacheingabe	●●●	11.09.2009 22:06	User Test	Heidelberger Druckmaschinen AG	10,00	14.09.2009 00:00	
117		7G.033.349 /	Schenkelfeder	●●●	11.09.2009 22:08	User Test	Heidelberger Druckmaschinen AG	10,00	14.09.2009 00:00	
130		7G.105.0010/	Stellantrieb	●●●	15.10.2009 17:19	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
131		7G.146.6111/01	Flacheingabe	●●●	15.10.2009 17:21	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
132		7G.033.349 /	Schenkelfeder	●●●	15.10.2009 17:22	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
147		SA.806.812 /	Unterlegscheibe	●●●	15.10.2009 18:06	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
150		7G.010.137F/05	Motorplatte kpl	●●●	15.10.2009 18:10	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
151		7G.146.6014/	Flacheingabe	●●●	15.10.2009 18:11	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	
152		7G.033.306 /03	Schenkelfeder	●●●	15.10.2009 18:13	User Test	Heidelberger Druckmaschinen AG	100,00	26.10.2009 00:00	

To apply for a new special release click on the  button.

You can enter all the data required for the special release application in the following screen.

Special release

Back Save Send

Special release #

Send to:* Heidelberg Druckmaschinen AG

Responsible:*

(Start search phrase with last name)

Material number:*

Material name:

Amount:* 0,00 Stück

Reason:*

Start at:* Delivery date

Price reduction: 0,00 %

Charge:

Supplier material number:

Serial number:

Device number:

Total costs if refused:* 0,00 EUR

Effects of denial:*

Comment:

Files: Sonderfreigabe

Send to:*

Heidelberger Druckmaschinen AG is always entered here and it cannot be changed.

Responsible:*

Click here on the entry field and choose the HEIDELBERG employee responsible for your application in the list.

Material number:*

Enter the HEIDELBERG part number here, where applicable with index, e.g. 00.145.3154/01.

Material name:

Enter the HEIDELBERG part designation here, e.g. support.

Amount:*

Enter the quantity here for which the application is being made. Enter the unit in the field to the right.

Reason:*

Describe the reason here why the parts to be delivered do not comply with the specification.

Start at:*

Enter the date on which the part was delivered for the first time.

Price reduction:

Enter the price reduction here for the parts that do not comply with the specification.

Charge:

You can enter the charge number(s) for the relevant delivery/deliveries here.

Supplier material number:

You can enter your material number here.

Serial numbers:

You can enter the serial number(s) for the part(s) here.

Device numbers:

You can enter the device number(s) for the part(s) here.

Total costs if refused:*

Enter the costs incurred by your company here for a release NOT approved. (min. €1)

Effects of denial:*

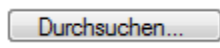
You can describe the effects here for HEIDELBERG if a release is NOT approved, e.g. delivery delayed by n weeks.

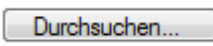
Comment:

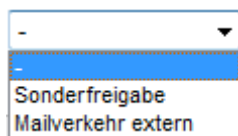
You can enter a comment here.

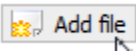
Files (pdf):

Here, you can enter the file name for the document to be sent or select a file by using the "Search"

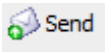
 button.

In the field at the right next to "Search"  you must choose whether the file attachment is to be a special release document or an email.






To attach another file click on the  button.

Your entries can now be ,  or deleted using the  button.

Use the  button to send the request. The email process is then started. You can then monitor the processing status in the Customer decision field.

Meaning of "Customer Decision"

-  Special release rejected
-  Special release enquired
-  Special release approved

Once the decision has been made you will be notified at the same time by email.

Note:

A decision that has been rejected cannot be revived, if necessary - a new inquiry has to be made.

5 Inquiry Process ("RFQ Deluxe")

If you are invited to a new RFQ (Request for Quotation), you will be sent an email with the following information:

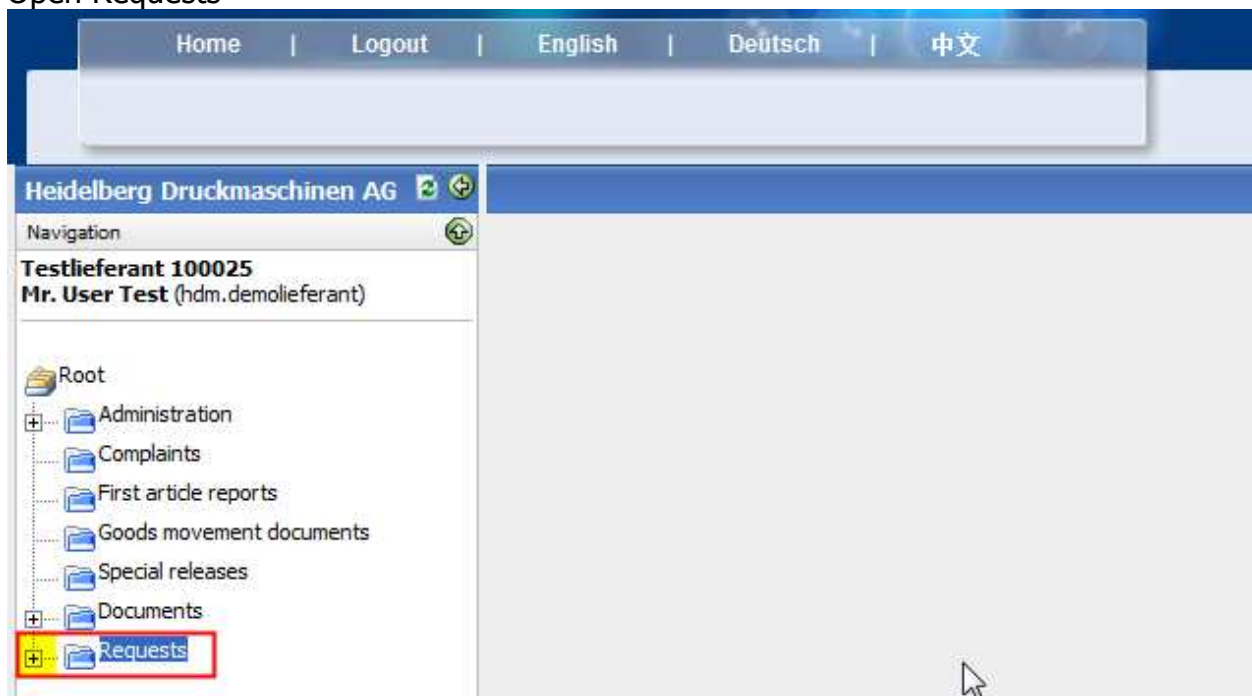
- Log in data (User name & password)
- Deadlines
- Direct link to RFQ

If you have a fixed account, you must log in with your log in details (User name & password).

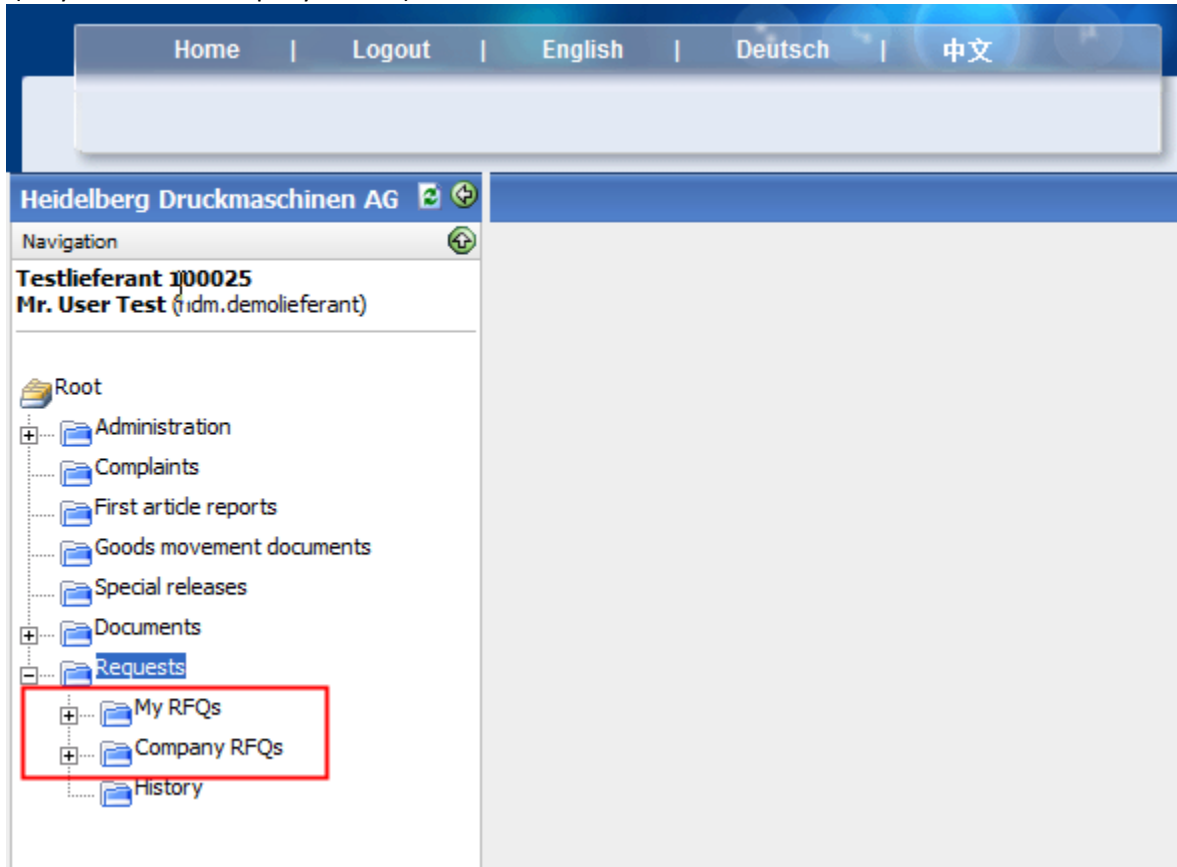
Once you have clicked on the link in your internet browser, enter your log in data. See 2.1.

We recommend copying the user name and password and then pasting them into the designated fields.

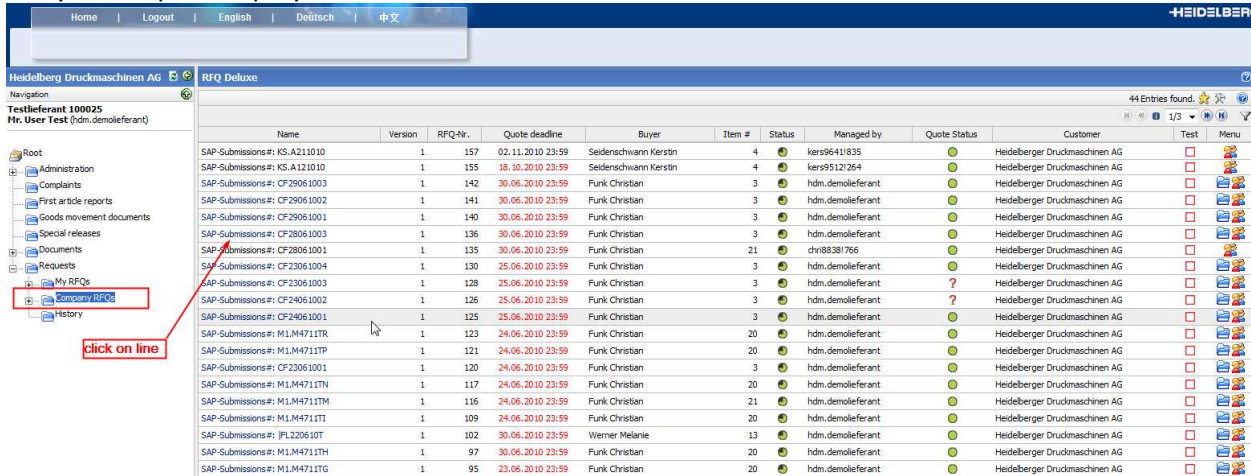
Open Requests



You can click in the menu tree to select the overview of inquiries requested by Heidelberg ("My RFQs" or "Company RFQst")

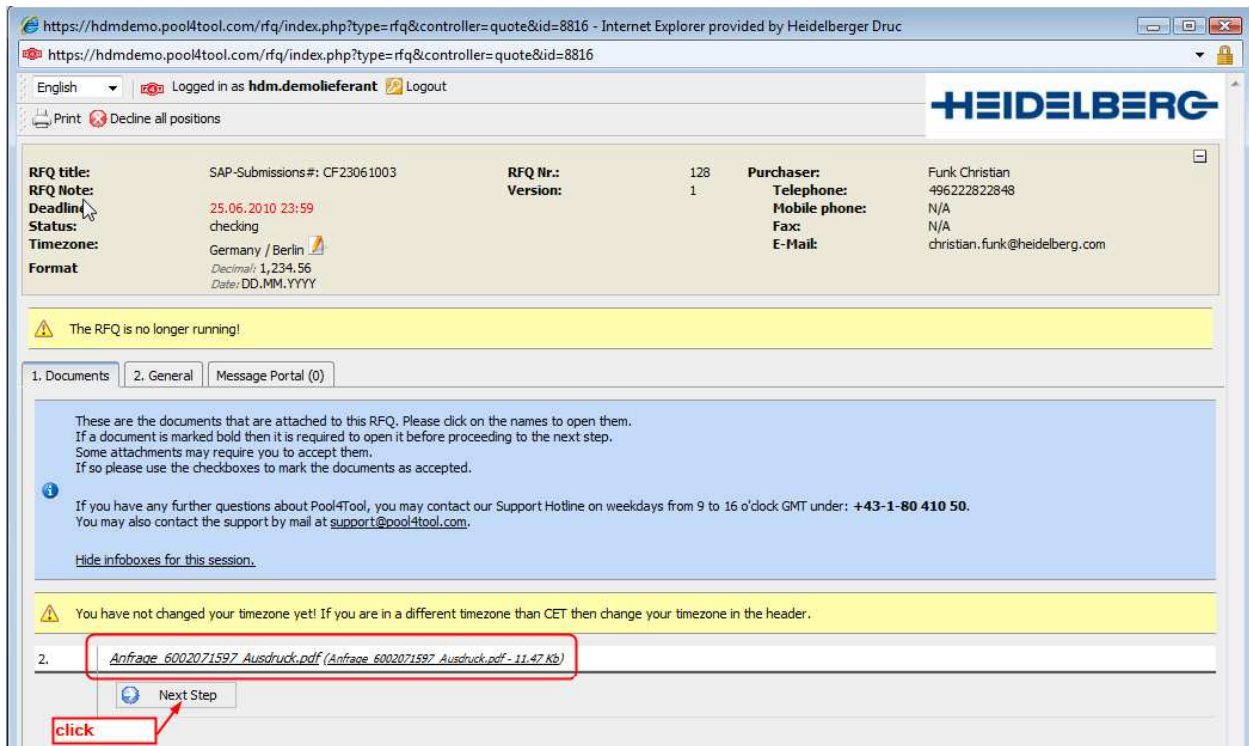


Entry into explicit inquiry:



5.1 Tab 1: Documents

Tab 1 "Documents" lists all the documents that are relevant for the RFQ. Click on the name of a document to open a document. On the purchaser side you can decide whether a document has to be opened or whether the terms and conditions have to be approved first before you can proceed to the next stage. Documents that have to be opened are highlighted in bold.



The screenshot shows a web browser window with the URL <https://hdmdemo.pool4tool.com/rfq/index.php?type=rfq&controller=quote&id=8816>. The user is logged in as **hdm.demolieferant**. The Heidelberg logo is visible in the top right corner. The main content area displays RFQ details:

RFQ title:	SAP-Submissions#: CF23061003	RFQ Nr.:	128	Purchaser:	Funk Christian
RFQ Note:		Version:	1	Telephone:	496222822848
Deadline:	25.06.2010 23:59			Mobile phone:	N/A
Status:	checking			Fax:	N/A
Timezone:	Germany / Berlin			E-Mail:	christian.funk@heidelberg.com
Format:	Decimal: 1,234.56 Date: DD.MM.YYYY				

Below the details, a yellow warning box states: "The RFQ is no longer running!". The interface has tabs for "1. Documents", "2. General", and "Message Portal (0)". A blue information box contains instructions: "These are the documents that are attached to this RFQ. Please click on the names to open them. If a document is marked bold then it is required to open it before proceeding to the next step. Some attachments may require you to accept them. If so please use the checkboxes to mark the documents as accepted." It also provides contact information for support: "If you have any further questions about Pool4Tool, you may contact our Support Hotline on weekdays from 9 to 16 o'clock GMT under: +43-1-80 410 50. You may also contact the support by mail at support@pool4tool.com." A "Next Step" button is visible, with a red box and arrow pointing to it labeled "click".

The Heidelberg inquiry form is linked as a PDF file.

If you do not submit a quotation for an inquiry you can refuse to participate in Step 1. The "Decline RFQ" button can be used to notify the purchaser of the decision. Once you have clicked on the button, you can enter a reason in the notes box explaining why you refused participation.

5.2 Tab 2: General

This tab contains the quotation settings and the supplier information.

In the "Quotation Settings" area the purchaser can specify whether you can make changes to the settings.

In the "Supplier Information" area you can view your personal details, which you can also edit.

The screenshot shows a web browser window with the URL <https://hdmdemo.pool4tool.com/rfq/index.php?controller=quoteGeneral&type=rfq&id=8816>. The user is logged in as **hdm.demolieferant**. The page displays RFQ details:

RFQ title:	SAP-Submissions#: CF23061003	RFQ Nr.:	128	Purchaser:	Funk Christian
RFQ Note:		Version:	1	Telephone:	496222822848
Deadline:	25.06.2010 23:59			Mobile phone:	N/A
Status:	checking			Fax:	N/A
Timezone:	Germany / Berlin			E-Mail:	christian.funk@heidelberg.com
Format:	Decimal: 1,234.56 Date: DD.MM.YYYY				

A warning message states: "The RFQ is no longer running!".

The interface has two tabs: "1. Documents" and "2. General" (selected). Below the tabs, a blue information box contains the following text:

The Quotation Settings show a summary of your basic data. If values are grayed-out, they are provided for your information and cannot be changed. Your contact details are listed in the Supplier Information. Please check them and correct the data if necessary!

If you have any further questions about Pool4Tool, you may contact our Support Hotline on weekdays from 9 to 16 o'clock GMT under: **+43-1-80 410 50**. You may also contact the support by mail at support@pool4tool.com.

Hide infoboxes for this session.

The "General" tab contains the following sections:

- Base Texts:** Header line: *ACHTLING TEST!! Bei technischen Rückfragen wenden Sie sich bitte an Herrn Hierl, Tel. 06222.... Jahresbedarf: 400 St.*
- Quotation Settings:** Currency*: EUR - Euro
- Supplier Information:**
 - Company Name*:** Testlieferant 100025
 - Person Name*:** Test User
 - E-Mail*:** Achim.Kamuf@heidelberg.com
 - Telephone:** Country Area Number: 004: 6205 2950
 - Fax:** Country Area Number: [] [] []
 - Comments:** [Empty text area]

A "Next Step" button is visible at the bottom, with a red box labeled "click" pointing to it.

5.3 Tab 3: Quotation

Tab 3 "Quote" lists all the positions that can be queried. A green tick in the "Required" column means that this position is a mandatory position and it must be filled in.

To fill in a position, you have to click on the "View Details!" button in the "Menu".

The screenshot shows the Heidelberg RFQ system interface. At the top, there is a header with the Heidelberg logo and user information: "Logged in as hdm.demolieferant". Below the header, there is a summary section with the following details:

- RFQ title: SAP-Submissions#: CF23061003
- RFQ Nr.: 128
- Purchaser: Funk Christian
- RFQ Note: Version: 1
- Telephone: 496222822848
- Deadline: 25.06.2010 23:59
- Status: checking
- Mobile phone: N/A
- Timezone: Germany / Berlin
- Fax: N/A
- Format: Decimal: 1,234.56
- Date: DD.MM.YYYY
- E-Mail: christian.funk@heidelberg.com

A yellow warning banner states: "The RFQ is no longer running!". Below this, there are navigation tabs: "1. Documents", "2. General", "3. Quote", "4. Send Back", and "Message Portal (0)".

The main content area contains an information box with the following text:

In this chart all enquired articles are listed.
For sending your offer it is necessary to submit a quote for all articles that are marked as required.
If documents are attached to the enquired articles you may either open them here or later during the quotation process.
Please click on Quote to retrieve further details and submit your quote.

If you have any further questions about Pool4Tool, you may contact our Support Hotline on weekdays from 9 to 16 o'clock GMT under: +43-1-80 410 50.
You may also contact the support by mail at support@pool4tool.com.

Hide infoboxes for this session.

Below the information box is a table titled "3 Requested Positions":

#	Material Number	Name	Commodity	Quantity	Unit	Price Unit	Files	Info	Required	Quoted?	Menu
1	DS033258S	Lever DS	SheetMetParts+Stamp.	10	PC	1	DRW_DS.033.258S/_01.PDF (101.8 Kb) DRW_DS.033.258S/_01.TIF (201.61 Kb)	ⓘ	--	?	View Details!
2	DS033257S	Lever DS	SheetMetParts+Stamp.	30	PC	1	DRW_DS.033.257S/_01.PDF (230.55 Kb) DRW_DS.033.257S/_01.TIF (57.89 Kb)	ⓘ	--	?	View Details!
3	DS033424	Plate	Comp.+Struc.Comp.	10	PC	1	DRW_DS.033.424/_00.PDF (101.8 Kb)	ⓘ	--	?	View Details!

The "View Details!" button in the "Menu" column of the first row is highlighted with a red box. At the bottom of the interface, there is a "Next Step" button and a status bar showing "Internet | Geschützter Modus: Aktiv" and "100%".

Once you have clicked on "View Details!" you enter an input screen for the respective position.

Mandatory fields are highlighted in bold and denoted by an asterisk (*).

As soon as all the fields are filled in you must click on the "Save & Next" button, this takes you automatically to the next position.

If you do not submit a quotation for one position, you can use the "Decline & Next" button. You can also enter notes in the "Comments" field explaining why you are not submitting a quotation at this position.

If you wish to you can also close the window between entries and then open it again later on to continue making entries. Not all the fields shown here need be displayed in your offer mask.

Print Decline all positions

RFQ title: SAP-Submissions#: CF23061003	RFQ Nr.: 128	Purchaser: Funk Christian
RFQ Note:	Version: 1	Telephone: 496222822848
Deadline: 25.06.2010 23:59		Mobile phone: N/A
Status: checking		Fax: N/A
Timezone: Germany / Berlin		E-Mail: christian.funk@heidelberg.com
Format: Decimal: 1,234.56 Date: DD.MM.YYYY		

The RFQ is no longer running!

1. Documents | 2. General | 3. Quote | 4. Send Back | Message Portal (0)

Position Information	
Positionnumber:	1/3
Material Number:	DS0332585
Name:	Lever OS
Commodity Number:	130100000
Needed Quantity:	10 PC
Attachments:	DRW_DS_033_2585_01.PDF (101.8 Kb) DRW_DS_033_2585_01.TIF (201.61 Kb)
Item Text:	Aluminiumrohre in Fife Qualität, mit besonderer Wärmebehandlung, spannungsarm, hohe Rundlaufgenauigkeit, eingeengte Toleranzen, halbe D 1795, in fixen Längen
Shipping address:	Heidelberger Druckmaschinen AG Güterbergstrasse 63769 Wiesloch DE
Quote	
Format:	Decimal: 1,234.56 Date: DD.MM.YYYY
Price Unit: (int)*	1
Delivery date:	02.01.2999
Plan delivery time [!]:	
Price*:	EUR /1PC
General Field	
Attachments:	Durchsuchen...
Comments:	

If possible, prefill identical fields on the next position?

Save & Next Decline & Next Back to Overview

5.4 Tab 4: Send Back

Tab 4 "Send Back" provides you with an overview of the general inquiry. To edit the entered data again, you must return to the designated tab.

If necessary, you can enter a supplier quotation number and your reference before returning the quotation to the purchaser.

Then you can click on the "Send Quote to Customer" button. Once you have clicked this button your quotation is returned to the purchaser and you can no longer edit the quotation.

The "Print" button is also available. This provides you with the previous view of a HEIDELBERG inquiry. Naturally, you can print out the inquiry if you wish to.

https://hdmdemo.pool4tool.com/rfq/index.php?controller=quoteSendback&type=rfq&id=8816

English Logged in as hdm.demolieferant Logout

Print Decline all positions

HEIDELBERG

RFQ title: SAP-Submissions#: CF23061003 **RFQ Nr.:** 128 **Purchaser:** Funk Christian
RFQ Note: **Version:** 1 **Telephone:** 496222822848
Deadline: 02.11.2010 00:00 **Mobile phone:** N/A
Status: Running **Fax:** N/A
Timezone: Germany / Berlin **E-Mail:** christian.funk@heidelberg.com
Format: Decimal: 1.234,56 Date: DD.MM.YYYY

1. Documents 2. General 3. Quote 4. Send Back Message Portal (0)

On this page your basic data and your quotes are summarised.
If you would like to adjust your offers you may re-quote at step 3. Quote.

If you have any further questions about Pool4Tool, you may contact our Support Hotline on weekdays from 9 to 16 o'clock GMT under: +43-1-80 410 50.
You may also contact the support by mail at support@pool4tool.com.

Hide infoboxes for this session.

Quotation Settings

Currency: EUR

Supplier Information

Company Name: Testlieferant 100025
Person Name: Test User
E-Mail: Achim.Kamuf@heidelberg.com
Telephone: 0049 6205 2950
Fax:
Comments:

Placed quotes

#	Material Number	Name	Commodity	Quantity	Price Unit	Price	Total Price	Files	Comments
1	DS033258S	Lever OS	SheetMetParts+Stamp.	10 PC	1	3,50 EUR	35,00 EUR	--	--
2	DS033257S	Lever DS	SheetMetParts+Stamp.	30 PC	1	2,75 EUR	82,50 EUR	--	--
3	DS033424	Plate	Comp.+Struc.Comp.	10 PC	1	5,64 EUR	56,40 EUR	--	--
						Sum: 11,89 EUR	Sum: 173,90 EUR		

Signatures and Labels

Supplier Quote Number:

Your Sign:

Send Quote to Customer

6 Document Exchange in Teamroom

In order to exchange documents outside the actual inquiry process (e.g. during the development process, during relocation projects or during operative procurement), the so-called "Teamroom" is used in P4T. Documents can be exchanged without any reference to SAP processes in the Teamroom.

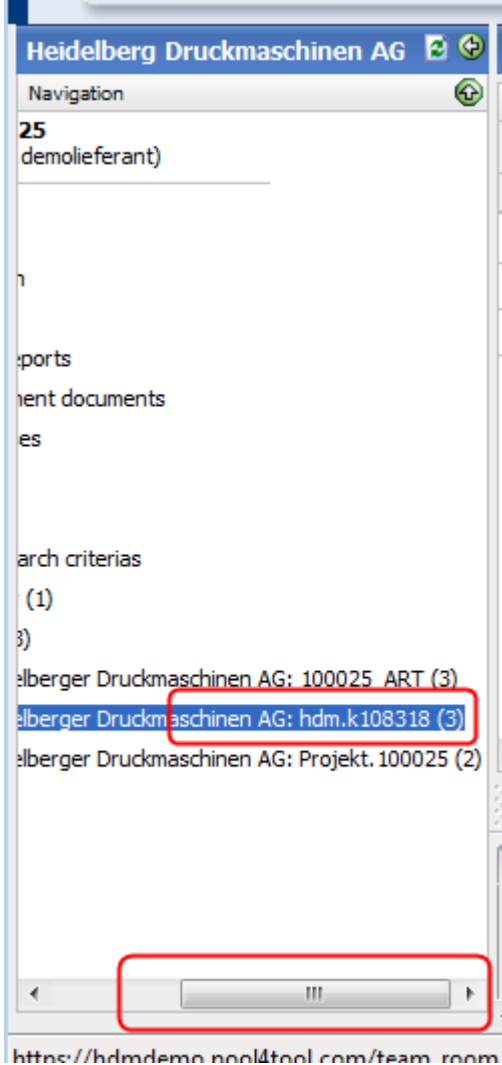
6.1 Supplier View

The header element of the document exchange is a "Project", which contains the Teamroom into which documents are to be filed. In the main menu select "Project".

Select Project (Projekt)

Sel	Pos.	Project	Object	Directory	Company	Owner	Avatar	File
<input type="checkbox"/>	↓	hdm.k108318			Heidelberger Druckmaschinen AG	Bieser, Martin	MB	VDA-Beleg.pdf
<input type="checkbox"/>	↓	5199	hdm.k108318	Test	Heidelberger Druckmaschinen AG	Funk, Christian	CF	Vockeotm Testdaten.txt
<input type="checkbox"/>	↓	hdm.k108318			Heidelberger Druckmaschinen AG	Bieser, Martin	MB	Kanbanbestellung.pdf

Caution - There is a slight flaw here: In order to differentiate between the various projects, one has to use the scroll feature at the bottom of the menu area to enable the project name to be seen:

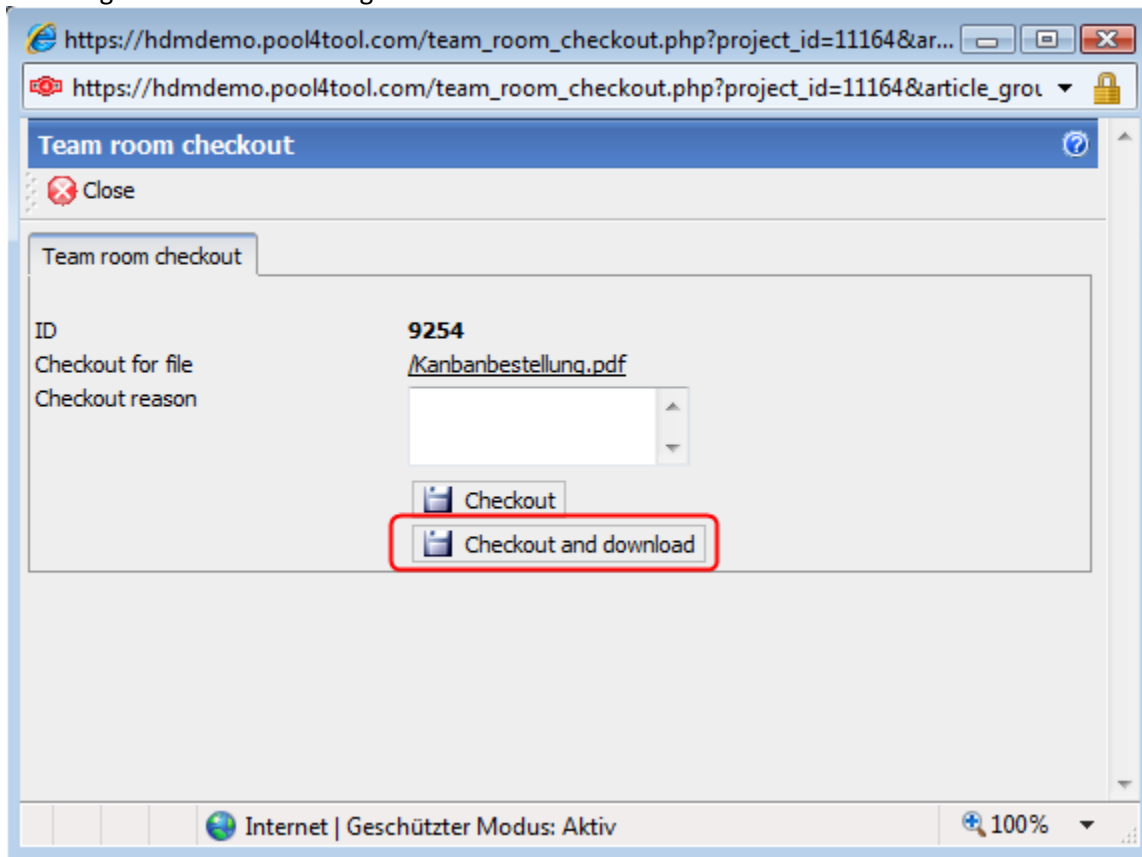


6.1.1 Editing Existing Document

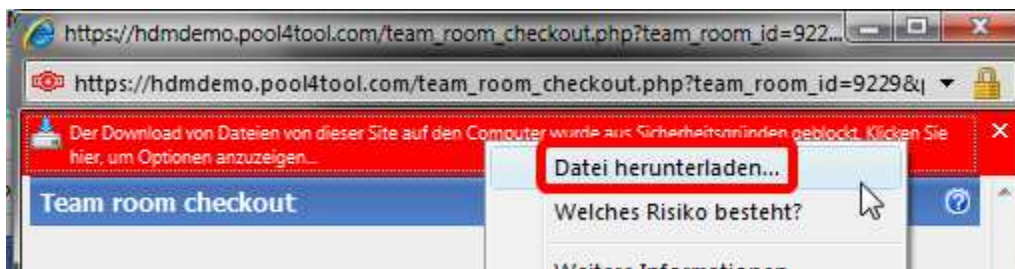
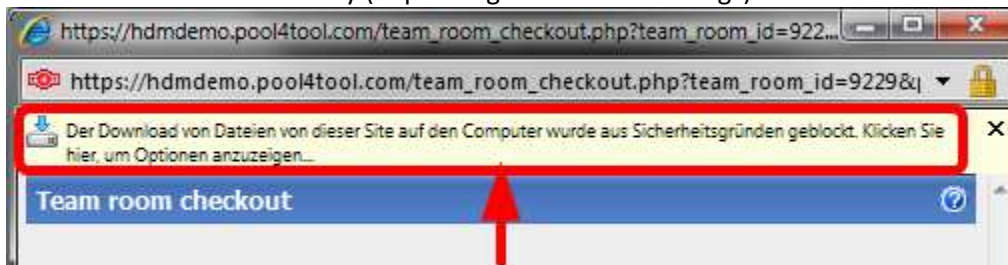
Check out the document to be edited:

Team room document search																	
3 Entries found.																	
Sel	Pos.	Project	Object	Directory	Company	Owner	Avatar	File	File size	Comments	Created	Last modified	hits	Team room	Approved	Menu	downloaded
<input type="checkbox"/>	↕	hdm.k108318			Heidelberg Druckmaschinen AG	Bieser, Martin		VDA-Beleg.pdf	58,71 KB		02.07.2010 14:20	2010-09-17 13:17:20	3				
<input type="checkbox"/>	↕	5199	hdm.k108318	Test	Heidelberg Druckmaschinen AG	Funk, Christian		Vockeotm Testdaten.txt	3,34 KB		05.07.2010 14:18		3				
<input type="checkbox"/>	↕	hdm.k108318			Heidelberg Druckmaschinen AG	Bieser, Martin		Kanbanbestellung.pdf	17,93 KB		15.07.2010 14:22	2010-09-17 12:01:09	1				

Checking out and downloading

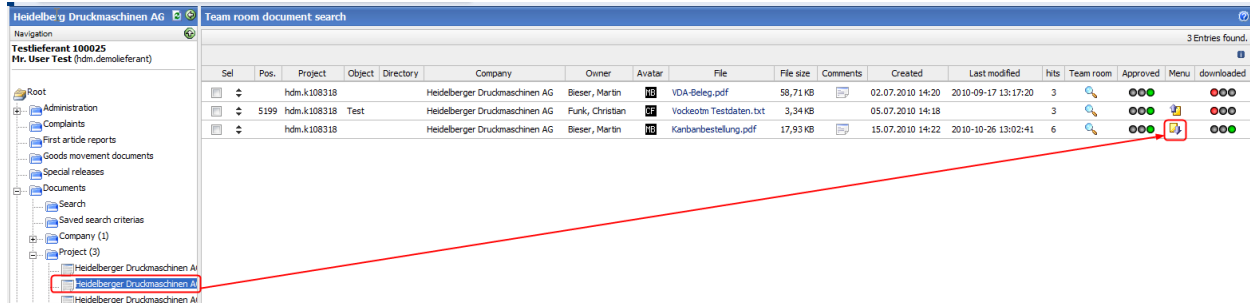


Permit download if necessary (depending on browser settings):





Edit file at storage location if necessary and then check back in again.



Search for file:

Owner	Avatar	File	File size	Com
Bieser, Martin	MB	VDA-Beleg.pdf	58,71 KB	
Funk, Christian	CF	Vockeotm Testdaten.txt	3,34 KB	
Bieser, Martin	MB	Kanbanbestellung.pdf	17,93 KB	

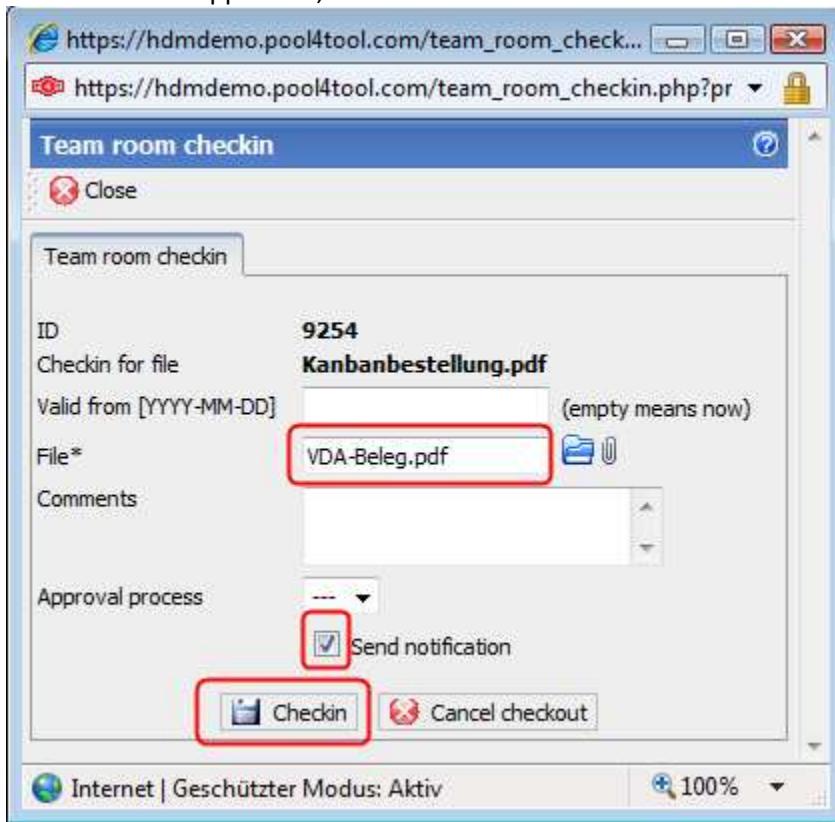
Upload selected file:

C:\Users\bieserma\Desktop

Durchsuchen...

Upload

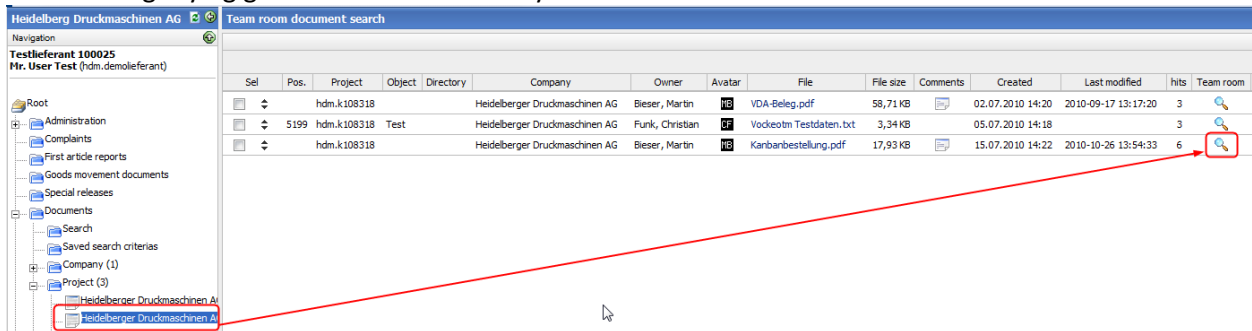
Check in where applicable, with notification



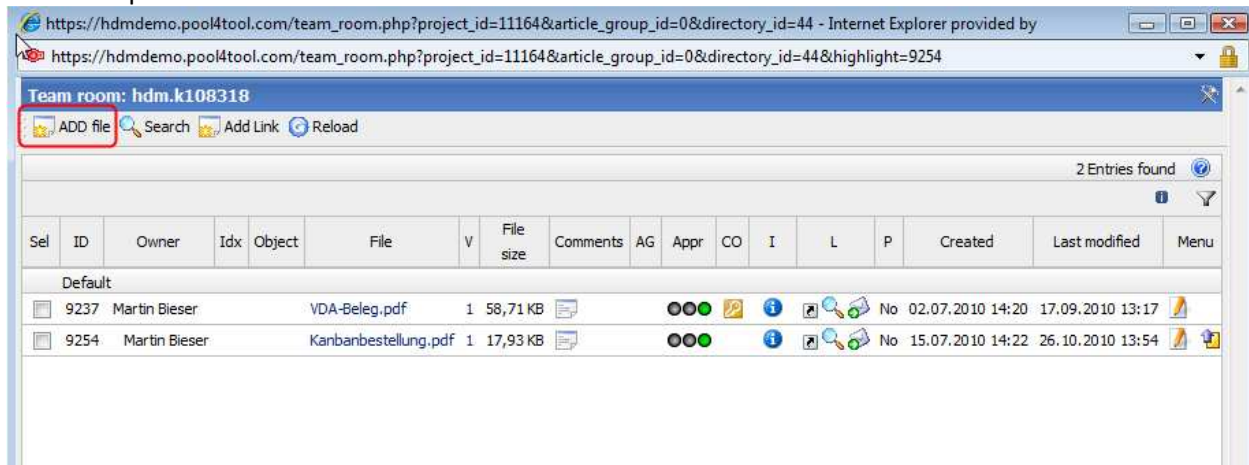
If necessary, acknowledge warning prompt for changed file name.

6.1.2 Adding New Document

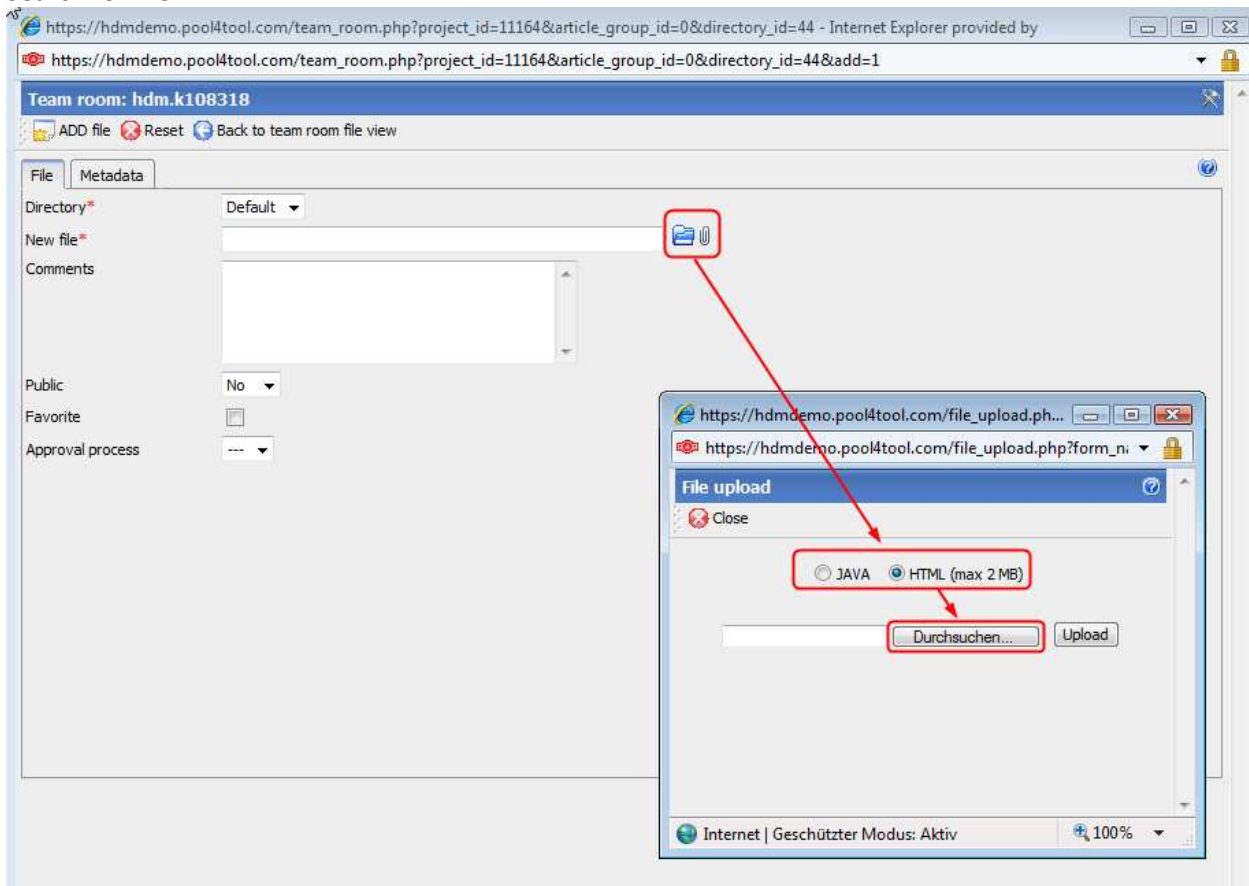
Click on magnifying glass if document already exists:



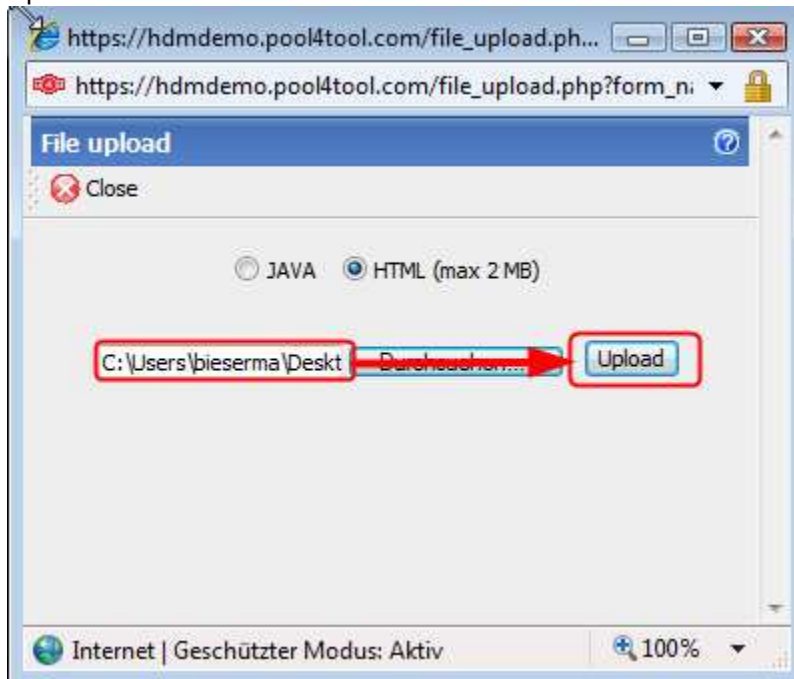
Window opens – Click on Add file:



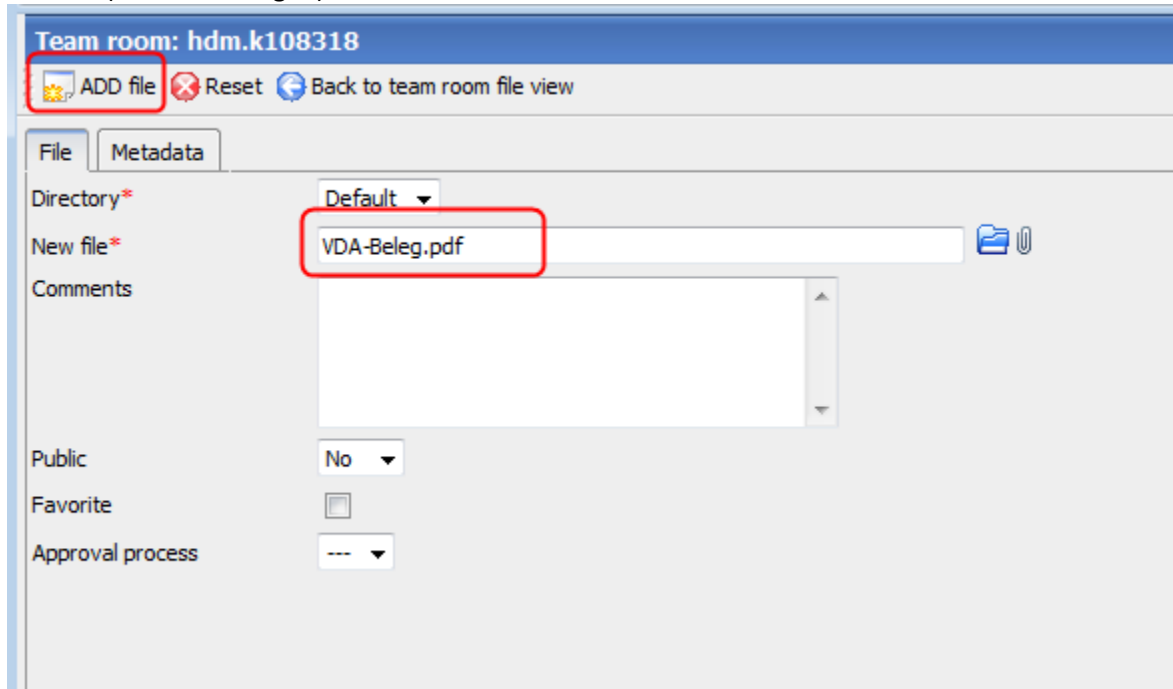
Search for file:



Upload:



Add file (Datei hinzufügen):

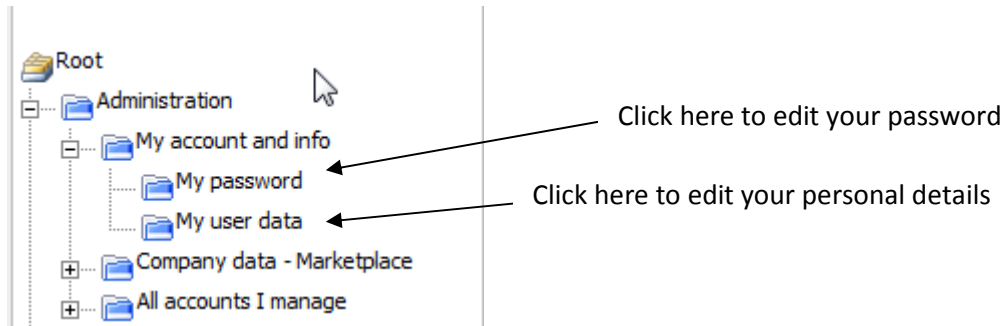


Close window (uploaded file is not displayed here yet)

If necessary, click on Project to update the file display.

7 Administration

In Administration you can edit your password and your personal details.



7.1 My Account and Information

You can change the settings for password and user details here.

7.1.1 Changing Password

A screenshot of a web form titled 'Change password'. The form has a header bar with the title 'Change password' and a sub-header 'Change password'. Below the header, there are three input fields: 'Old password', 'New password', and 'New password (repeat)'. At the bottom right of the form, there are two buttons: 'CHANGE' and 'Reset'.

Now enter your current password and the new password twice and confirm with *CHANGE*. After you have confirmed the new password, you have to log out and then log in again using the new password.

If any error messages appear you may need to repeat the procedure and choose another password.

7.1.2 Changing User Details

User data

Back Save

User data

First name* User

Last name* Test

Gender* male female

Title

Country- Area-Code Number

Telephone 0049 6205 2950

Mobile phone

Fax

E-mail* Achim.Kamuf@heidelberg.com

Birthday

Language English German French Italian Spanish Czech Other:

Main language German

Decimal separator . [DOT] , [COMMA]

Decimal places 2

The following fields can be altered:

- First name and surname
- Gender
- Telephone, mobile phone and fax numbers, email address
- Language: You can enter your communication language here.
- Main language: You can select the language here which is to be used as the default language for the Portal.

Once you have changed the data click on *Save*

7.2 User Administration

7.2.1 Creating New User

Open Administration > All accounts I manage > User data menu item and click

The screenshot shows the user administration interface for Heidelberg Druckmaschinen AG. The page title is "User data". The navigation menu on the left includes "Administration", "My account and info", "Company data - Marketplace", "All accounts I manage", "User data", "Department responsibility", "Complaints", "First article reports", "Goods movement documents", "Special releases", "Documents", and "Requests". The "User data" menu item is selected. The main content area displays a table with the following columns: Name, Loginname, E-mail, and Menu. The table contains three rows of data, with the first two rows partially obscured by black redaction marks. The top navigation bar includes links for Home, Logout, English, Deutsch, and 中文, along with the HEIDELBERG logo.

Name	Loginname	E-mail	Menu
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

Click on "ADD User"

Fill in the above-marked fields then click on "ADD".

Because the log in name for all Pool4Tool users is jointly managed, you should place an individual abbreviation in front of your company name to ensure that there is no overlap between user names in other companies. HDM will use, e.g. "hdm." as a prefix.

The total length of the log in name must not be any more than 20 characters!

If a log in name has already been issued an error message is shown when creating the name and another log in name must be chosen.



Two authorisation roles are available:

User: can edit all processes in the Portal, but may not manage any other users

Administrator: can manage supplier users (create, block, delete, reset passwords,...)

User creation is confirmed with a green message and (if checked) the user is automatically notified per email about the new User ID and the password.

7.2.2 Department Responsibility

The department responsibility decides which user – and therefore which email address – is notified of new processes by HDM. This should preferably be a technical user with a group post box. A group post box should be used to ensure that several people in your company can access the information on the new processes in the Portal. In the Portal only one person can be assigned the department responsibility and therefore only one email address can be filed. Emails can then be distributed from there throughout the email system internally to the actual person in charge.

Before transferring department responsibility to a user, the user has to be assigned to the corresponding department first. This is done in the User list by clicking on the user to be assigned:

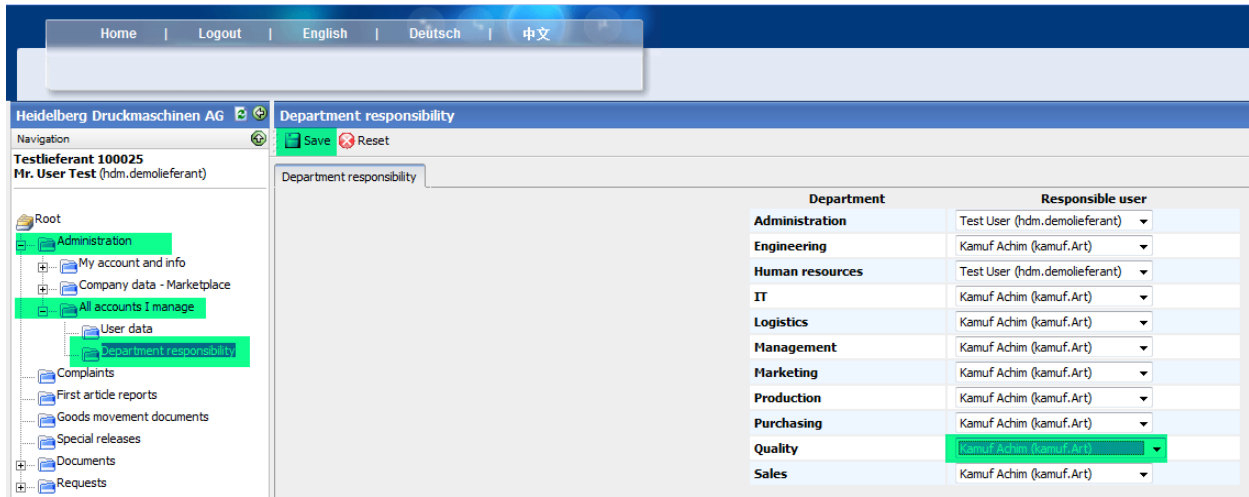
The screenshot displays the user management interface for Heidelberg Druckmaschinen AG. The top navigation bar includes 'Home', 'Logout', 'English', and 'Deutsch'. The main header shows 'Heidelberg Druckmaschinen AG' and 'User data'. Below the header, there is a 'Navigation' section with a tree view. The tree view shows a hierarchy starting from 'Root', with 'Administration' and 'All accounts I manage' highlighted in green. Under 'All accounts I manage', 'User data' is also highlighted. The main content area shows a list of users with the following entries: '100025, Benutzer', 'Kamuf, Achim' (highlighted in green), 'Manfred, Becker', and 'Test, User'. There is an 'ADD user' button at the top of the user list.

The detailed view opens and the user can be assigned to a corresponding department by placing a tick in the appropriate box:

The screenshot shows a web interface for user management. At the top, there is a blue header bar with the text "User data" and two buttons: "Back" (with a circular arrow icon) and "Save" (with a green checkmark icon). Below the header, the form is organized into several sections:

- Telephone:** Three input fields for telephone numbers.
- Mobile phone:** Three input fields for mobile phone numbers.
- Fax:** Three input fields for fax numbers.
- E-mail*:** A text input field containing "Achim.Kamuf@heidelberg.com".
- Birthday:** A text input field containing "0000-00-00".
- Language:** A list of checkboxes for languages: English, German (checked), French, Italian, Spanish, Czech, and Other: [input field].
- Main language:** A dropdown menu set to "German".
- Decimal separator:** Radio buttons for ". [DOT]" (selected) and ", [COMMA]".
- Decimal places:** A text input field containing "0".
- Force relogin every:** A dropdown menu set to "5 min".
- Short Date Format:** A dropdown menu set to "DD-MM-YYYY".
- Long Date Format:** A dropdown menu set to "DD-MM-YYYY".
- Short Time Format:** A dropdown menu set to "H:MM".
- Long Time Format:** A dropdown menu set to "H:MM".
- Time Zone:** A dropdown menu set to "Germany / Berlin".
- Permissions:** A list of checkboxes: User (checked), Admin.
- Department:** A list of checkboxes for various departments: Administration (checked), Engineering, Human resources, IT, Logistics, Management, Marketing, Production, Purchasing, Quality (checked and highlighted with a green box), and Sales.
- Main department:** A dropdown menu set to "Purchasing".

After this, select "Department responsibility" in the menu tree, choose the corresponding user in the appropriate department (in this case Achim Kamuf for Quality) and save the setting.



From this point on, all HDM quality processes are automatically sent to the email address of Achim Kamuf.

7.2.3 Editing, Deleting Other Users, Resetting Password

To do so, click on the User list in the menu tree and then click on one of the following symbols in the corresponding User bar:



to edit the user details including the department allocation



to delete a user (with safety prompt)



to reset the password – the user is immediately sent an email when this symbol is clicked with contains an automatically-generated new password.