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Supplier Connection (PSA)

Administrator Guide_V3.5_EN

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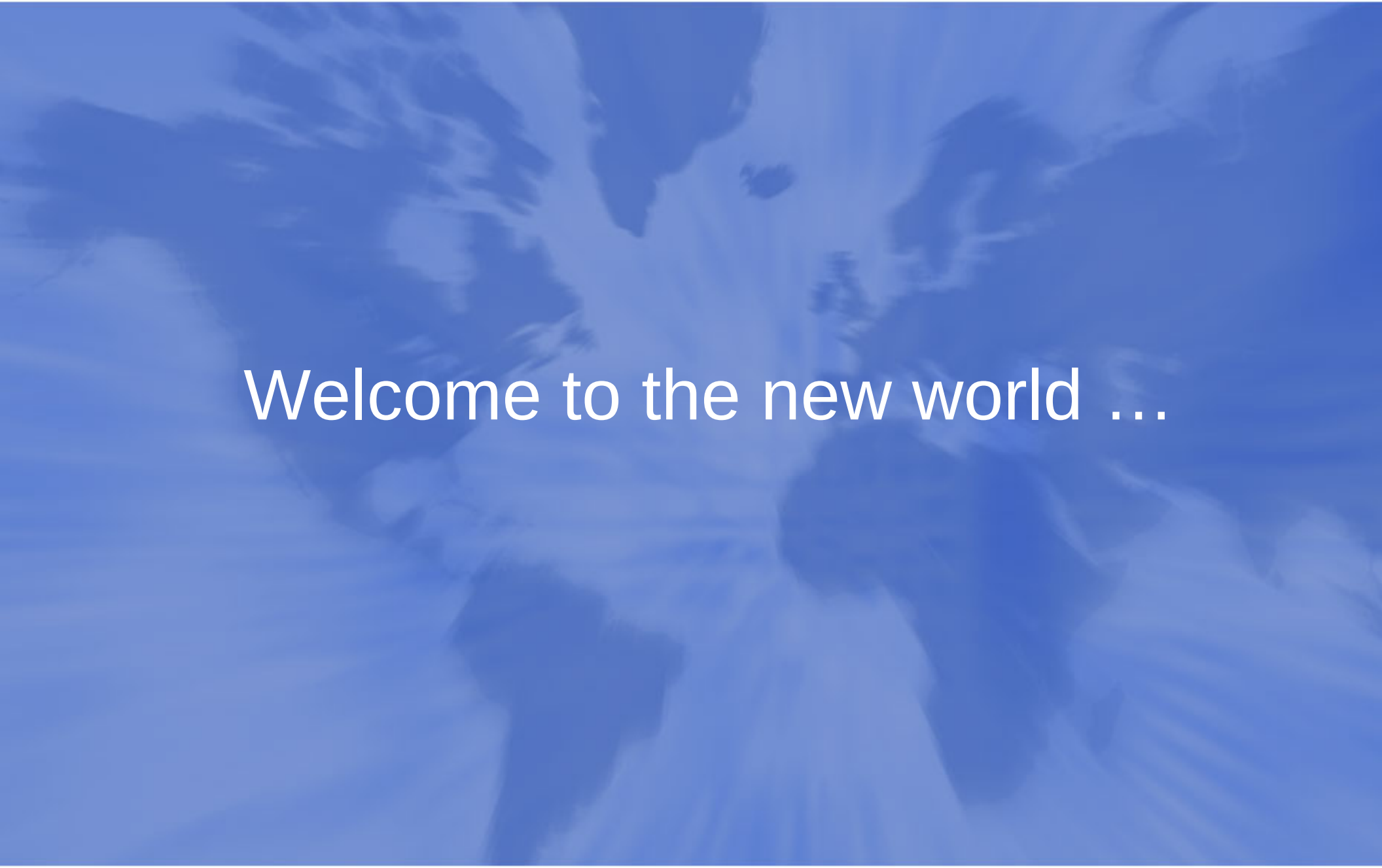

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covisint … welcome to the world of business now℠

Covisint enables companies of any size, location or technical sophistication to securely share vital business information, applications and processes across their trading partner network. As a leading provider of interoperability solutions and services, Covisint helps businesses speed decision-making, reduce cost and improve responsiveness in serving customers.

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Administrator Guide

v3.5 English

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How to get started?

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Step 1 Introduction

About this Guide

- The purpose of this guide is to enable a Company/Application Administrator to use Supplier Connection administrative functions.

Prerequisites

The company wishing to use Supplier Connection has:

- Knowledge of basic computer and Internet functionality
- Been registered with Covisint according to the Covisint Common Registration Process
- Read the Terms and Conditions and signed the appropriate order forms with Covisint

Step 1 Introduction

- The administrator should have an understanding of the document types used in Supplier Connection and the sending and receiving of these documents to their trading partners.

Supplier Connection currently supports the following documents:

- Material Release (or Planning Schedule with release capability DELFOR, 830 or equivalent document)
- Shipping Schedule (DELJIT, 862 or equivalent document)
- Advance Ship Notice (DESADV, 856, Delivery Note or equivalent document)
- Invoice (INVOIC, 810 or equivalent document)

Step 1 Introduction

System Requirements

- Microsoft Internet Explorer 5.5 SP2 – (or higher recommended)
- Internet Connection 56K (or higher recommended)
- Adobe Acrobat Reader 7.0 (for viewing of printable reports).
- This is a free download and can be obtained from: http://www.adobe.com/products/acrobat/readstep.html
- 300 MHz processor (or higher recommended)
- 64 MB of RAM (or higher recommended)

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Information and Training

Step 2 Information and training

Originator Specification

- Supplier Connection is uniquely configured for each of your trading partner (buying) organizations. Consequently, functionality and specific data fields shown in this guide may vary and will only be visible once a trading partner relationship has been set up or a specific user role has been assigned. Keep the following requirements in mind as you proceed throughout this guide and application:

Required (mandatory) fields:

- The required fields are dependent on the originator (buyer) specifications. The number of displayed fields might vary according to each buyer company.

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Step 2 Information and training

Online help and training material

- Please log into Covisint Portal to access the training material, select the **Training** tab at the top of the screen, then Supplier Connection (PSA).
- When inside the Supplier Connection application, please select the **Help** tab. Comprehensive **User Guides** are also available for downloading.
- Please see example in the next slides.

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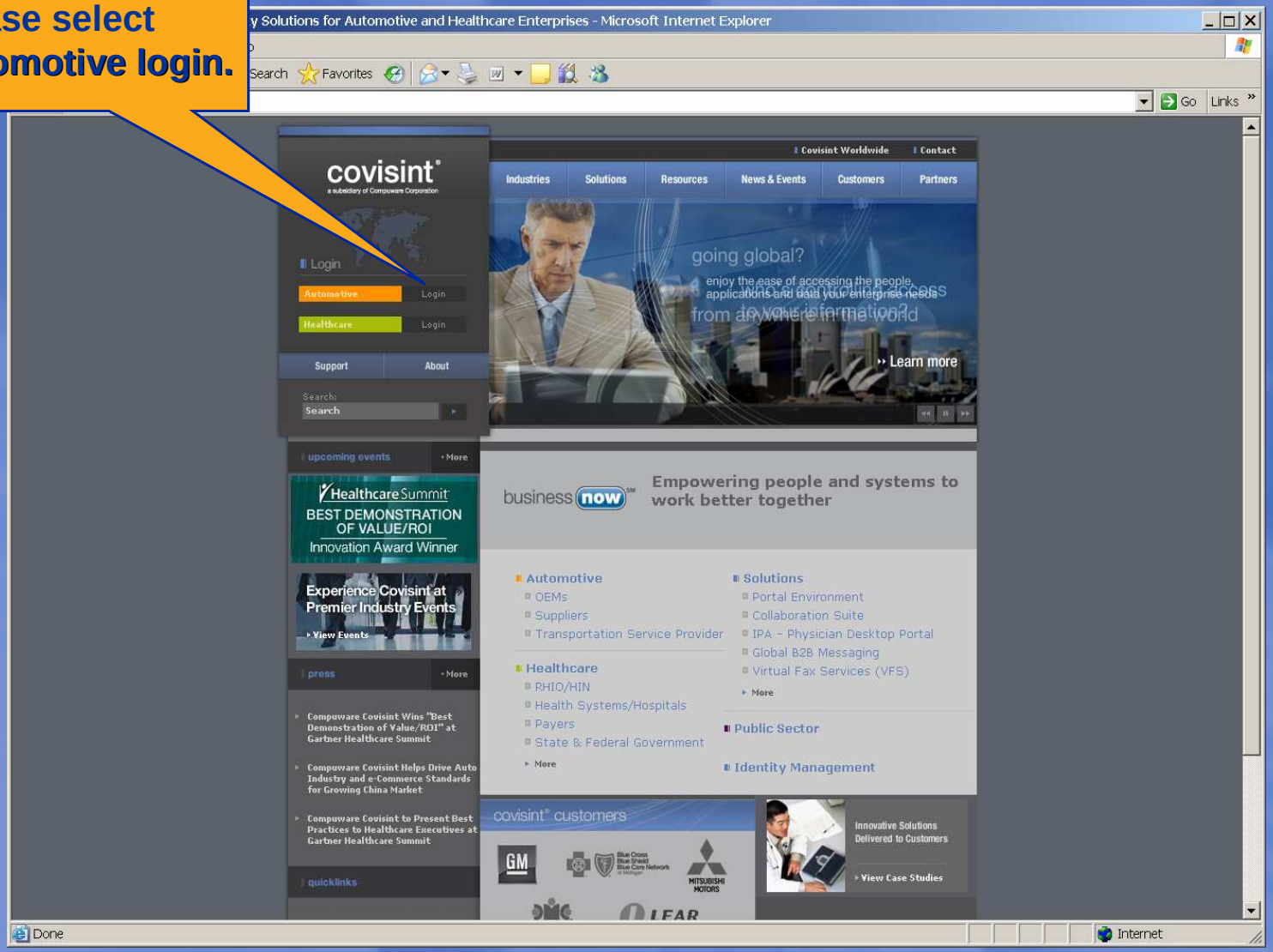
Please select Automotive login.



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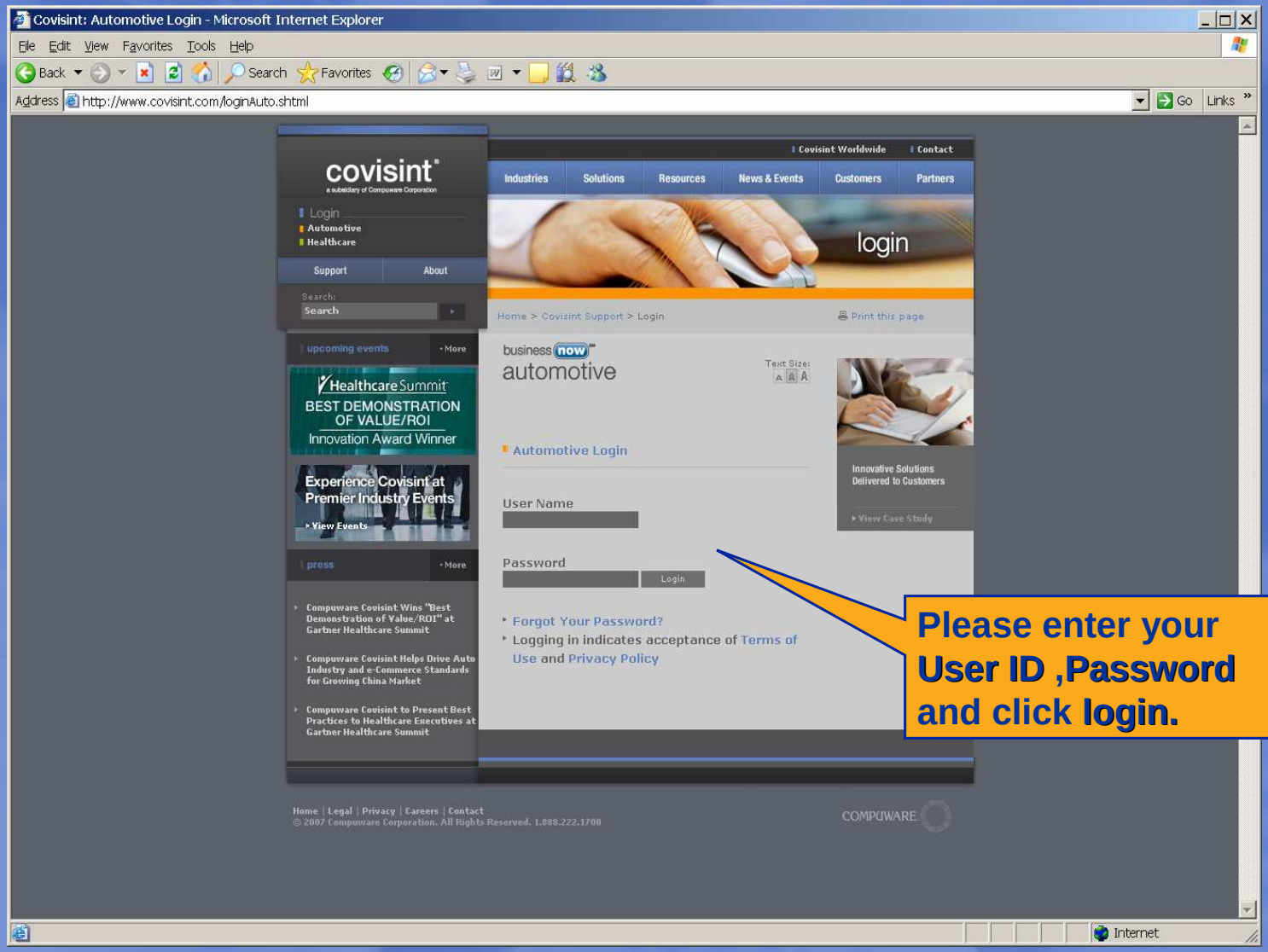

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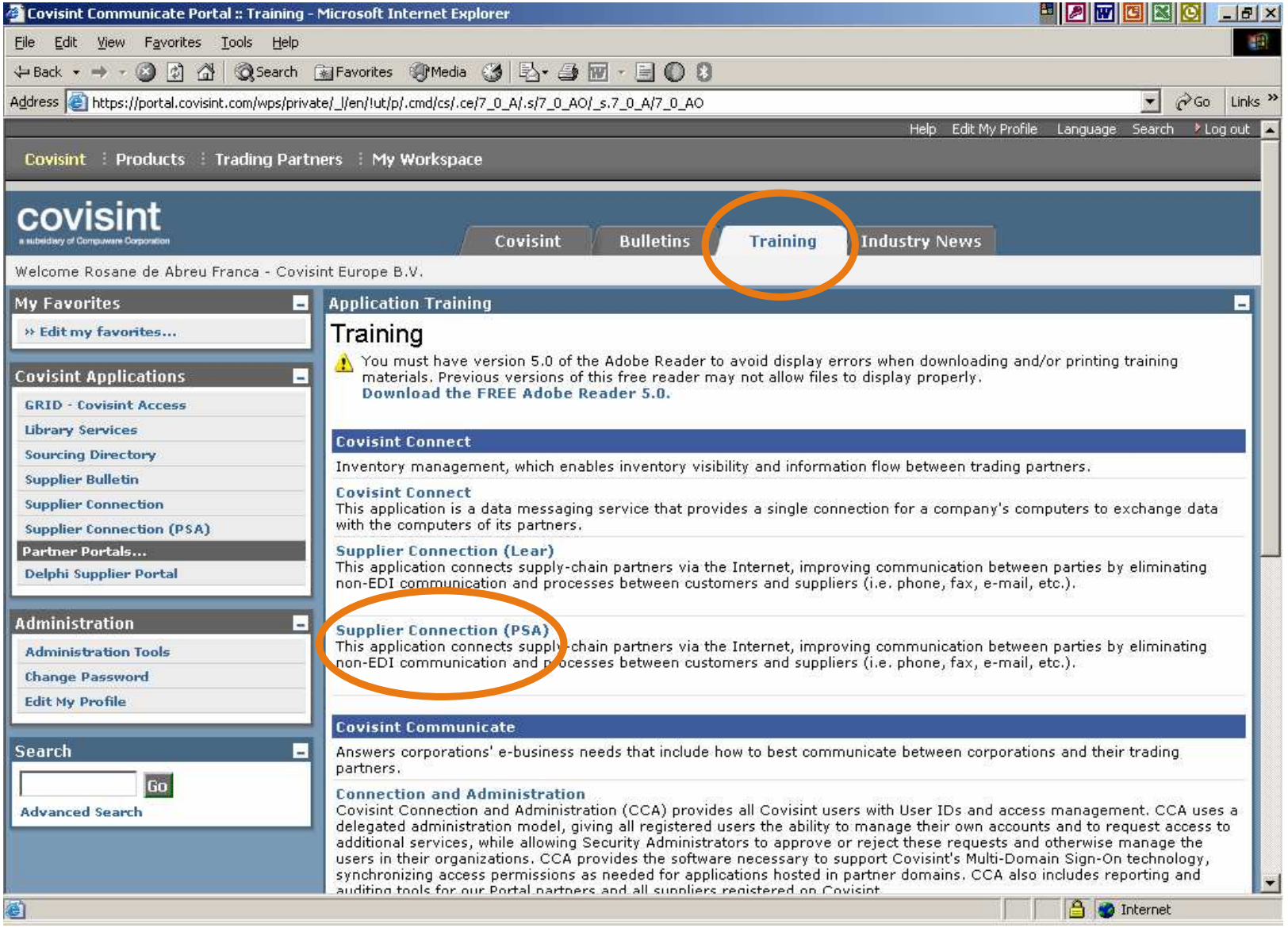

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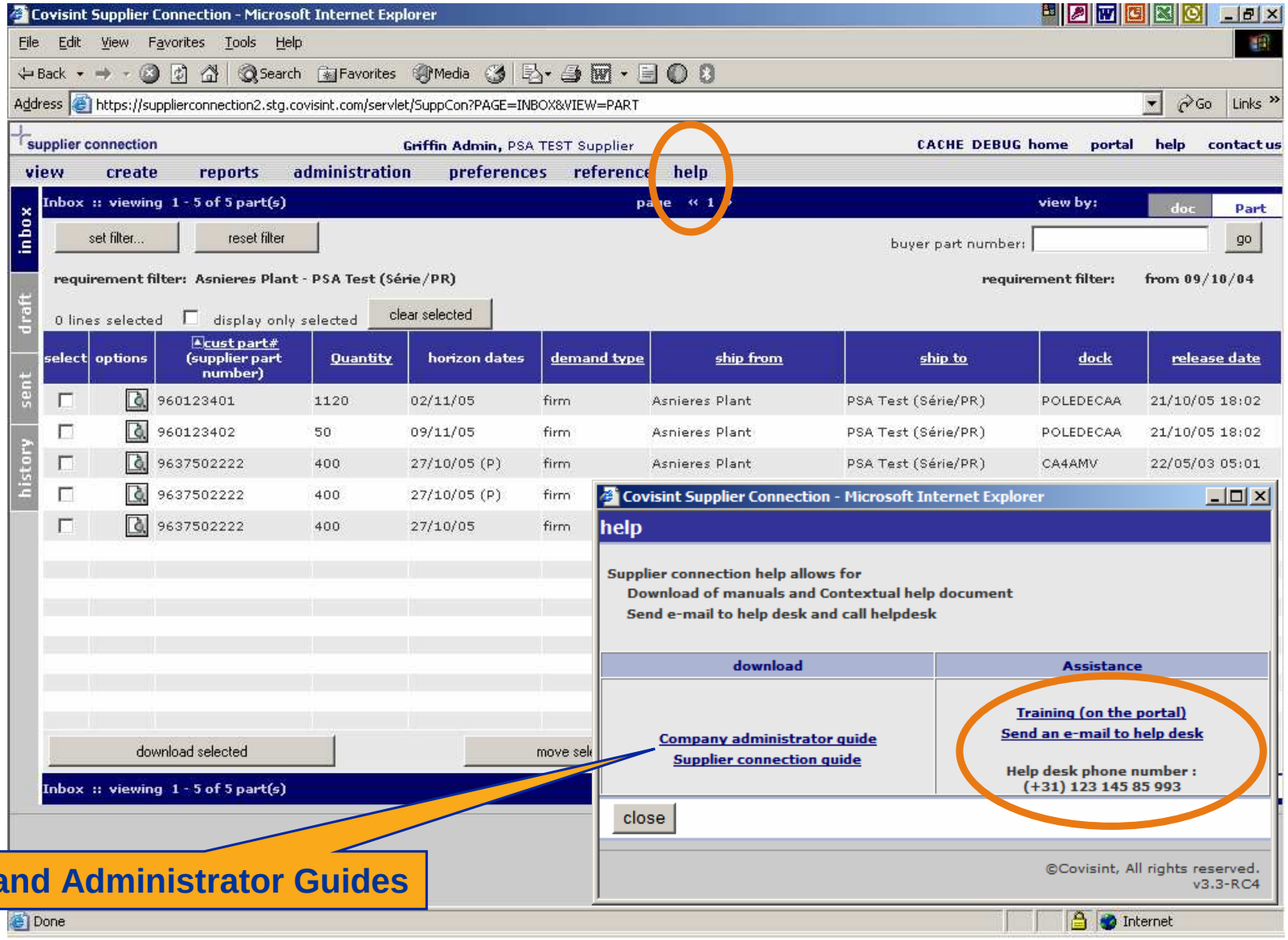

User and Administrator Guides

Step 2 Information and training

- **Start up manual**

The start-up manual provides guidance for establishing user preferences and setting up company information and ship-from location information

- **Configuration manual**

This manual details each reference file that must be setup before transactions such as ASNs and Invoices can be created.

- **Configuration manual part II – Invoice only suppliers**

This document details the set up of a ship-from / ship-to relationship with a "test" PSA buyer company. The steps to update buyer part records are detailed.

- **Test manual**

This document has been designed to assist you through the testing and validation with PSA.

Step 2 Information and training

- **Invoice Manual**
  This manual details the steps to directly create an Invoice through the 'create' menu. A test invoice is to be created and transmitted for the "test" PSA buyer company established in the test manual or for invoice only suppliers in the configuration manual part II.
- **Mailbox Set Up Manual**
  This manual details how to set up your mailbox into V1 or V2 depending on the deljit information, and how to set up your mailbox at the moment of the V2 deployment.
- **User Guide**
  This document is a general reference manual. It describes system navigation, setting individual user preferences, and viewing EDI documents, as well as creating EDI transactions. This document is similar to this present one but features available for administrators only are not detailed.
- **Upload Guide**
  A data file can be used to update the Part Master reference file. A data file can be used to upload an ASN or an invoice. This guide describes how to define the file format and conduct data uploads into Supplier Connection.

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User Management

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Step 3 User Management

Roles of Supplier Connection administrator

- Setup all users, locations, assign user to locations, and assign privileges to the users for each location.
- Setup and maintain the trading partnership(s) between the supplier company and the buying organization.
- Setup and maintain the reference database information that becomes the default information when Advance Ship Notices and/or Invoices are created and sent to the buying organization.
- Can perform all functions of a general user (please see Participant Guide for further details).

Step 3 User Management

- An Administrator(s) must be assigned (from within your company) and added (by the Covisint Supplier Connection - Registration Team) before the system allows access to the Administrator's functions in Supplier Connection.
- Adding users to Supplier Connection is the responsibility of the Administrator. The Administrator is granted access to Supplier Connection by the Covisint Registration Team. Once the Administrator has access, he/she may then add additional users to the application.
- For the Administrator to successfully add a user to Supplier Connection, the user must first be registered with Covisint have a Covisint ID and be granted access to Supplier Connection.

  Please follow the steps in the next slides.

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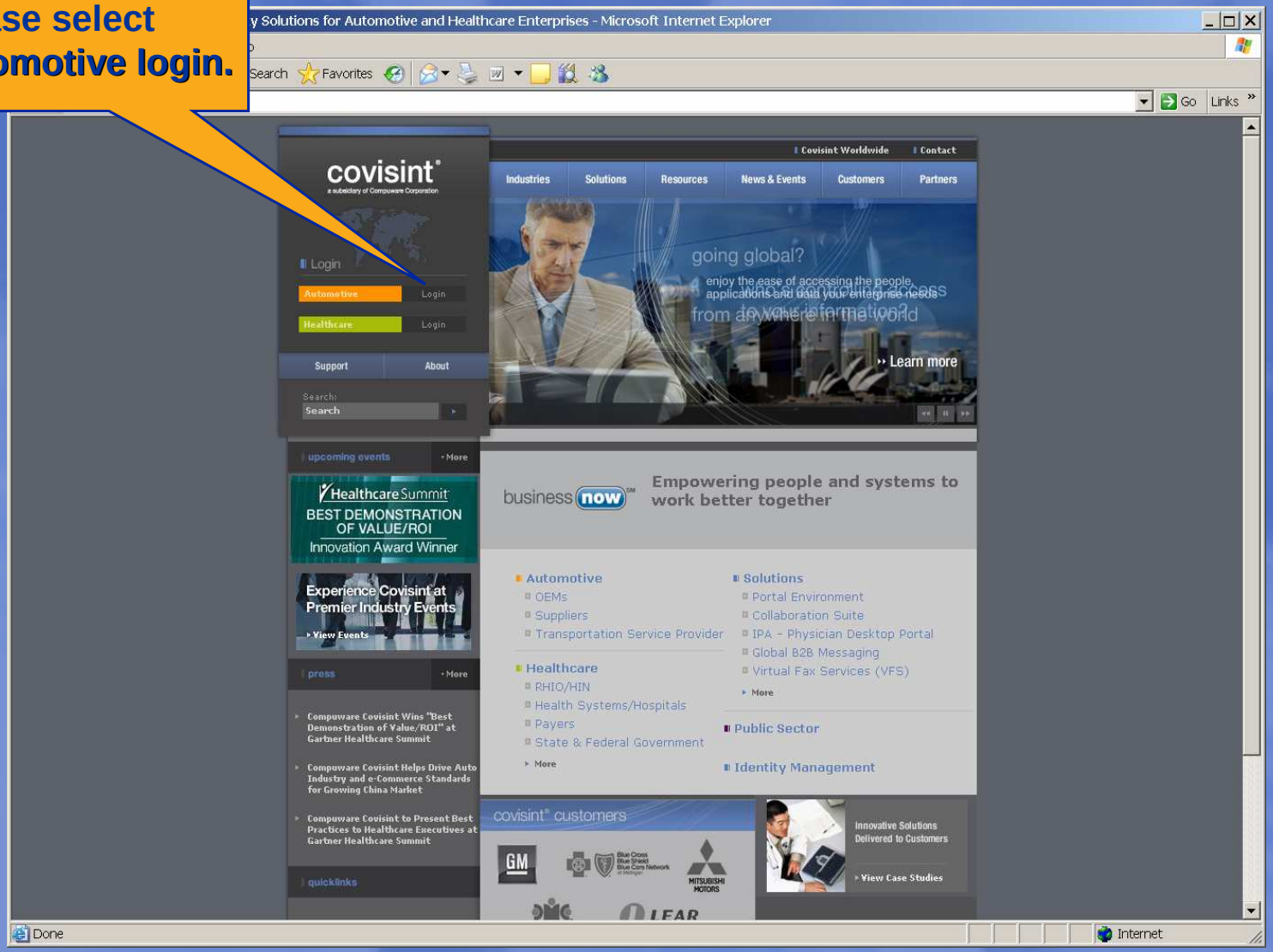
Please select Automotive login.



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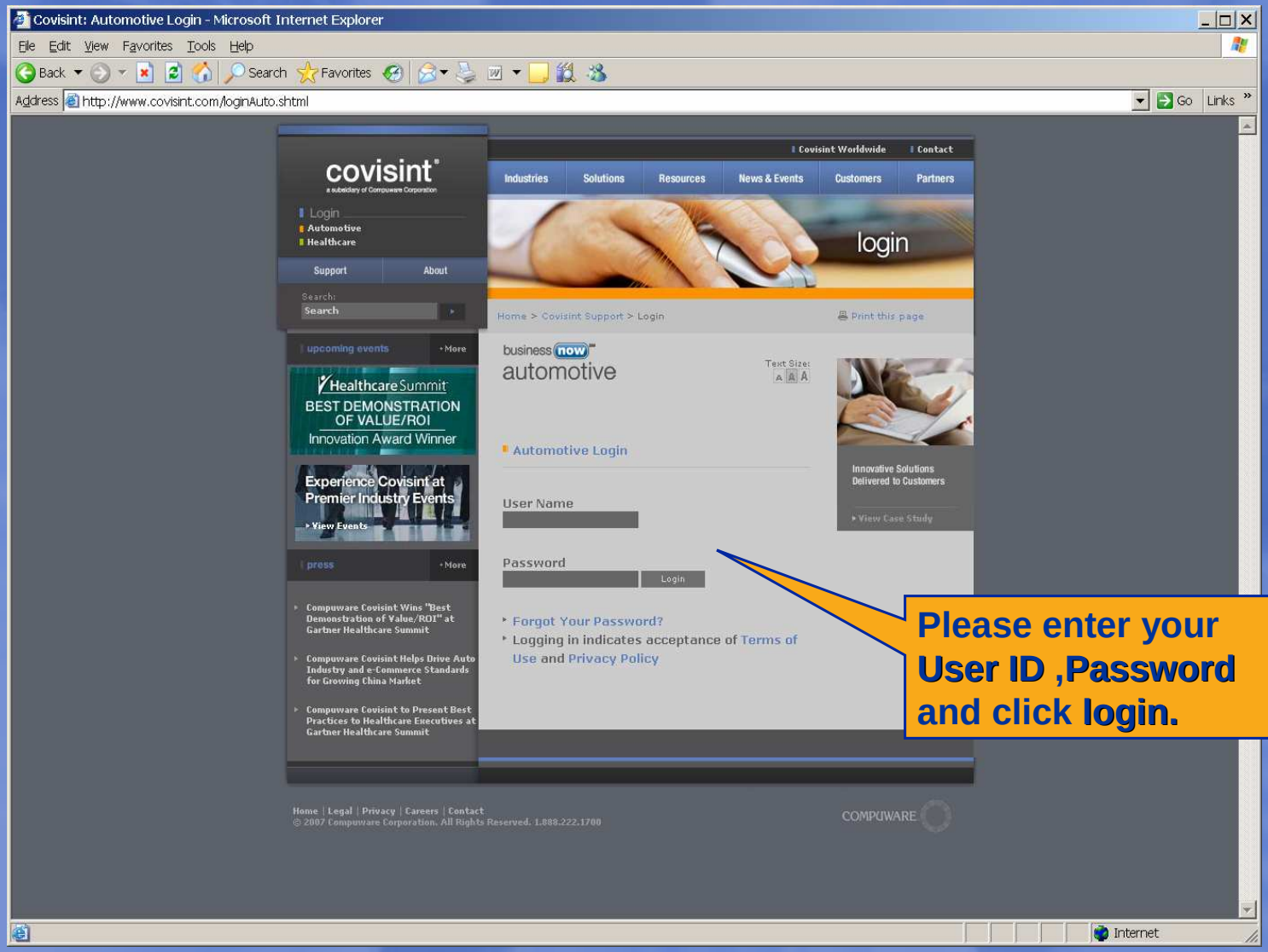

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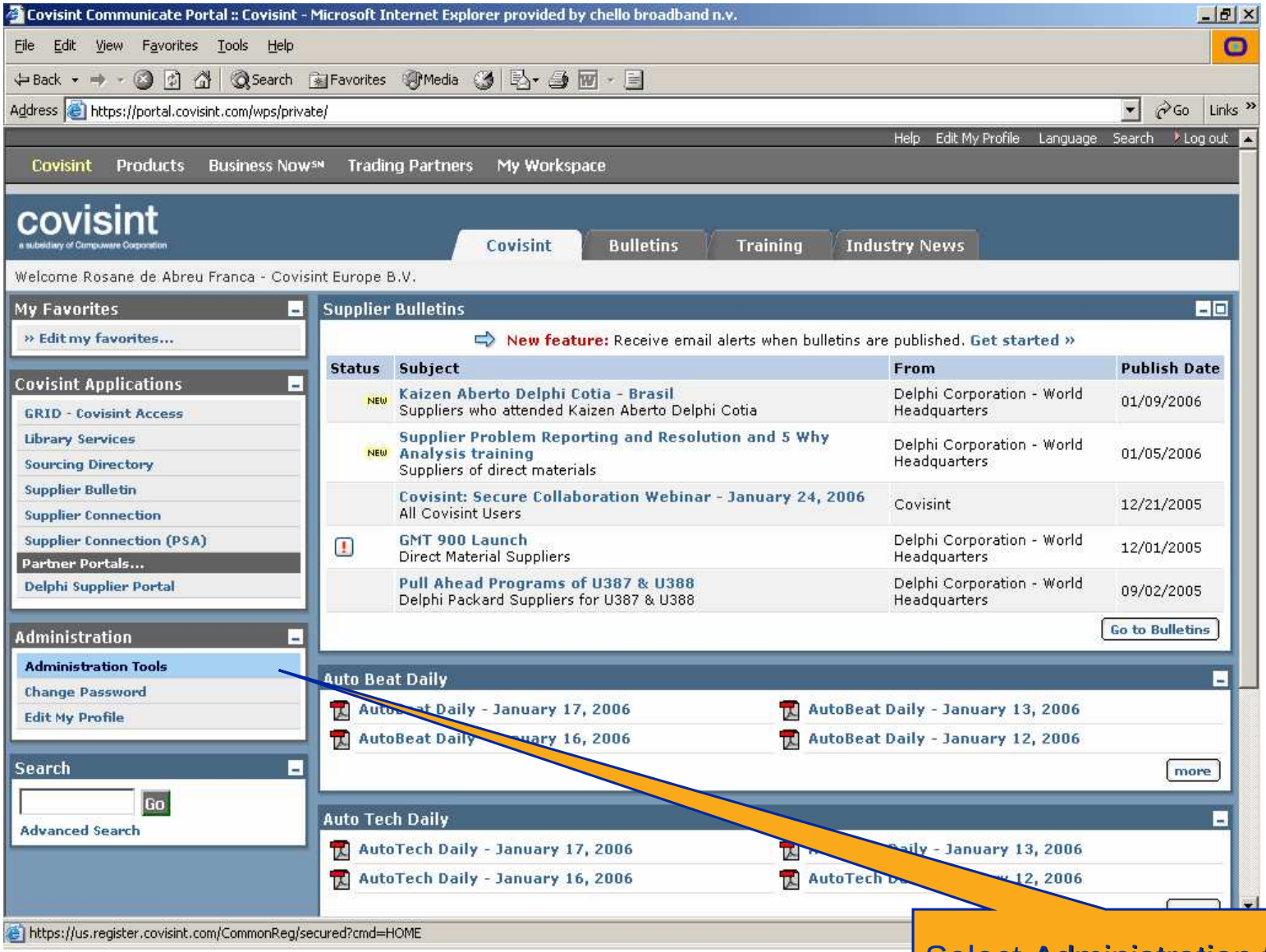

Select **Administration tools.**

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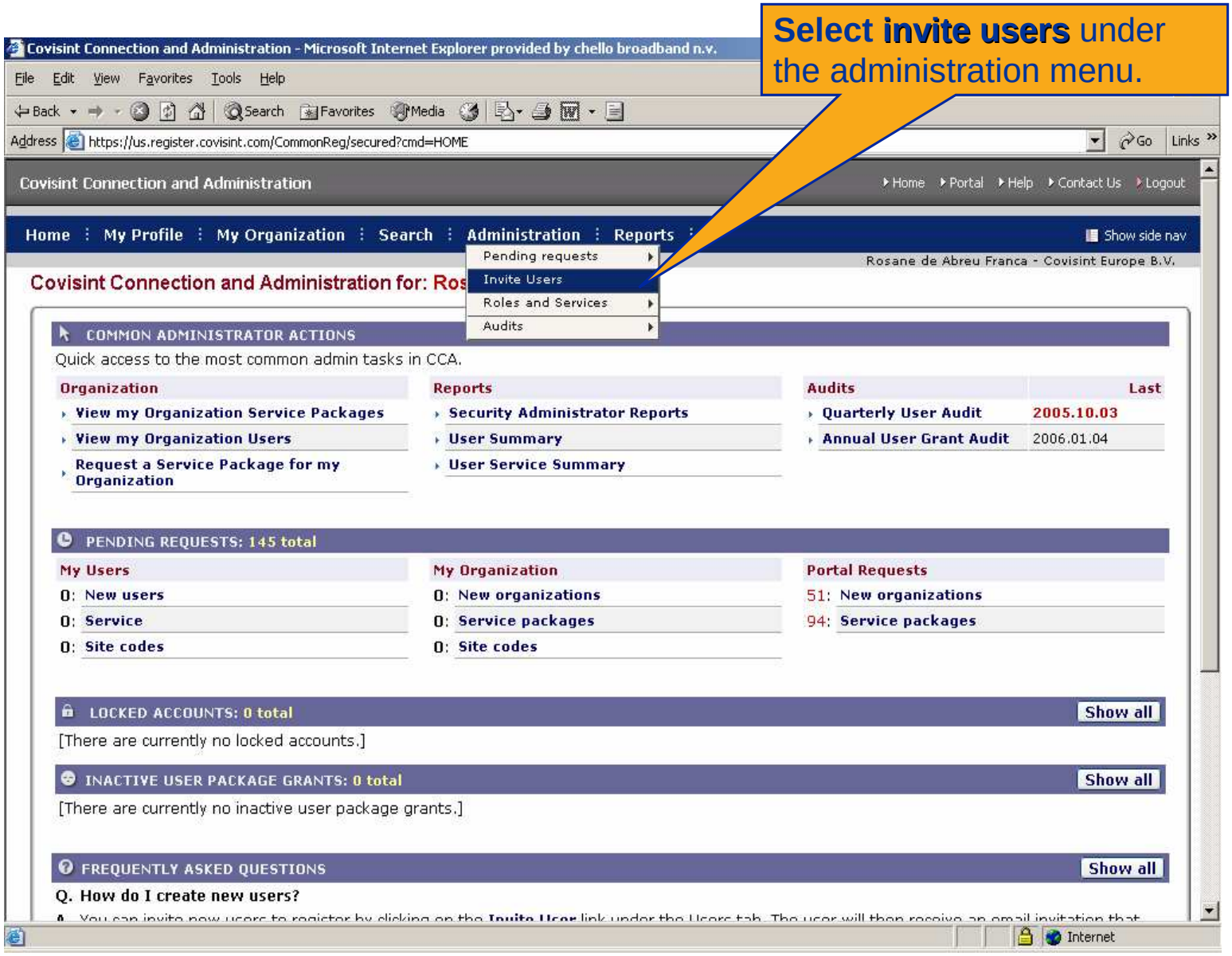

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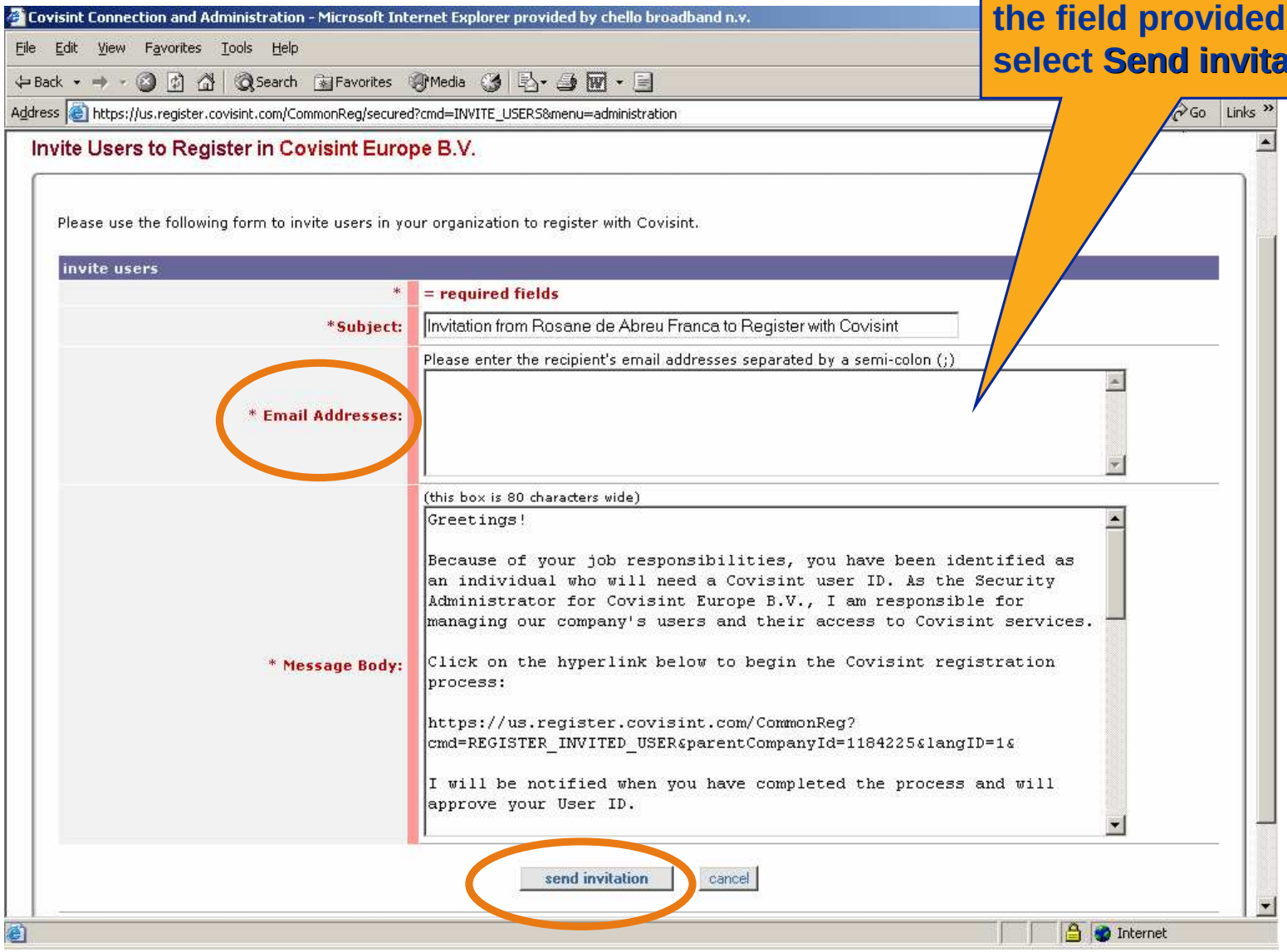
Enter the e-mail address in the field provided then select Send invitation.



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Step 3 User Management

- Some email systems may block the invitation email. There is a simple work-around: copy and paste the text of the invitation into an email and send it to the user. They will still be able to use the link to begin the registration process. Please see link below:

  Please ensure that the user selects Supplier Connection as the required package.

  https://us.register.covisint.com/CommonReg?cmd=REGISTER

- Once the registration link has been submitted by the user, you will receive a notification e-mail to approve the request.
- As soon as approval has been granted you will be able to add the user into Supplier Connection.

- Please follow the instructions on the next slide.

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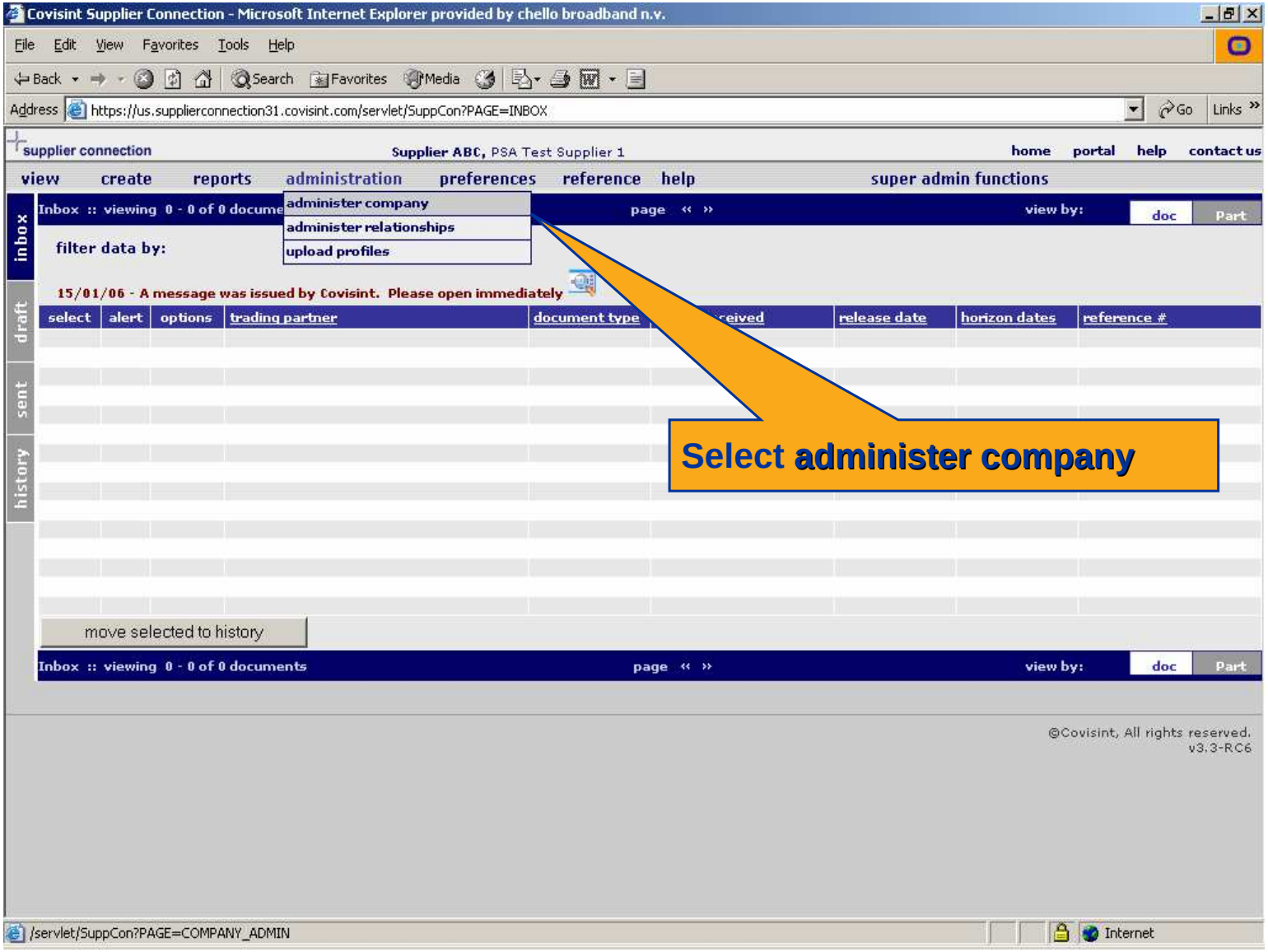

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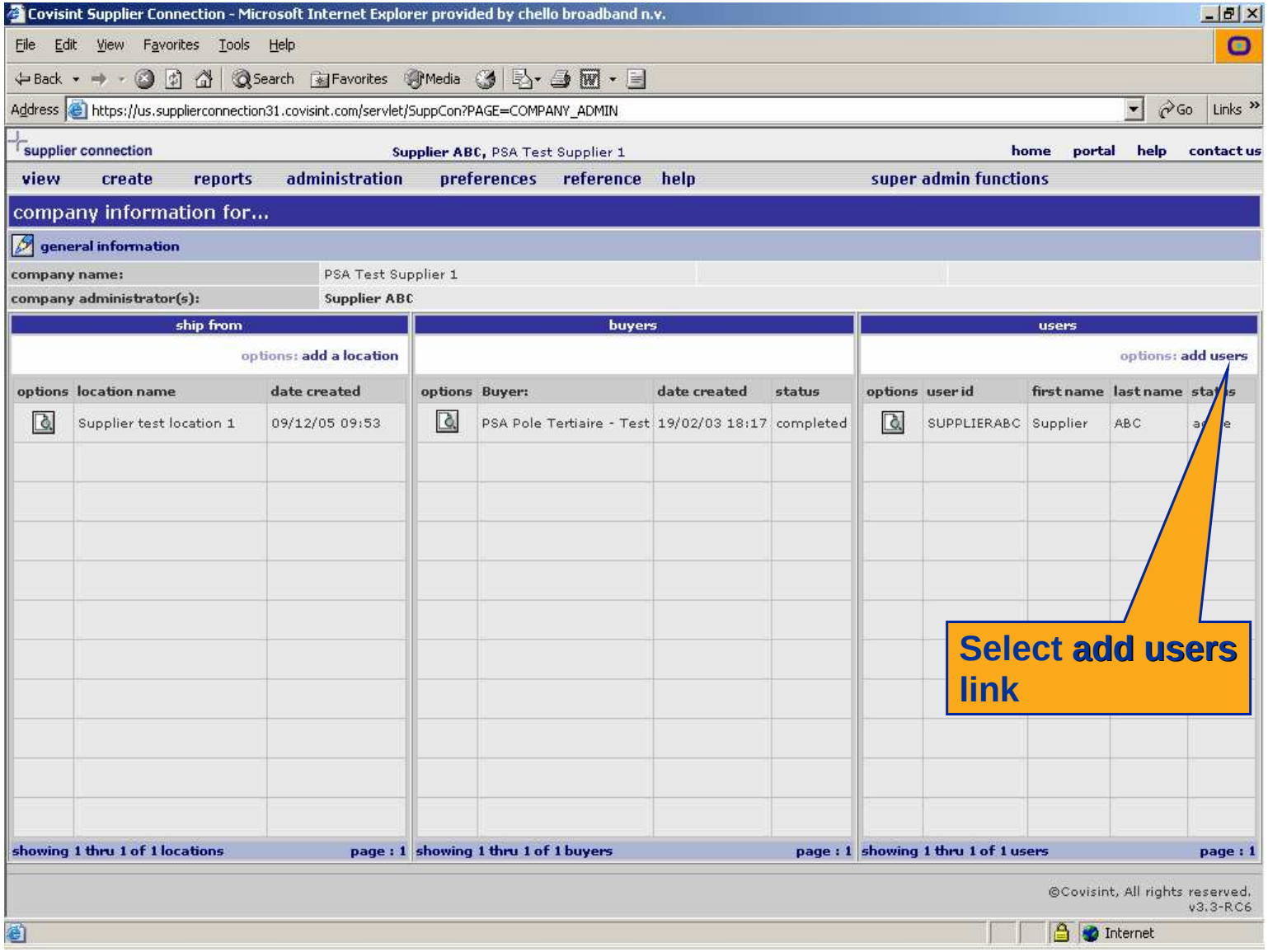
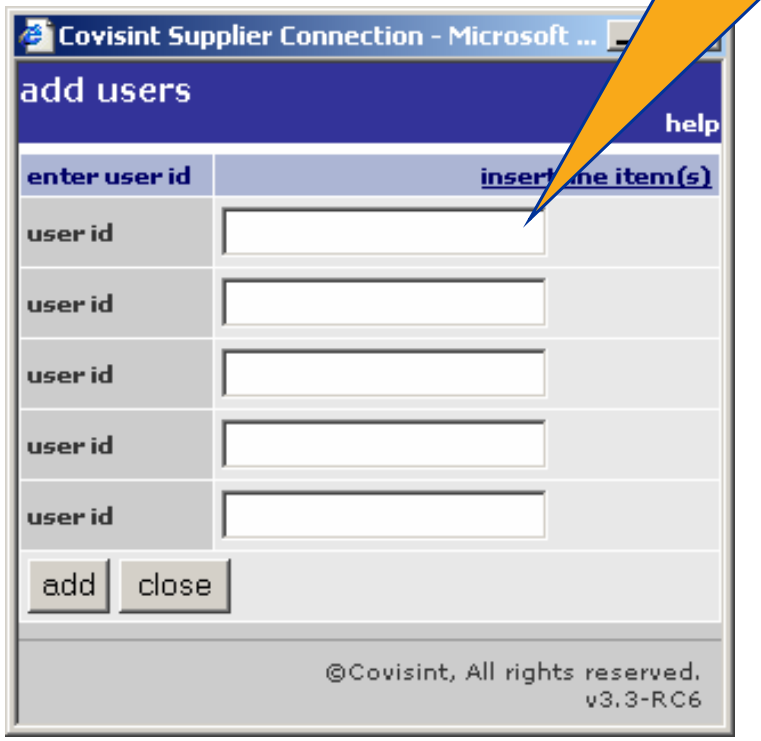


Enter user ID then select **add** and then **close**



Step 3 User Management

Assign a User to a Location and Set Privileges

- Once an Administrator has added a user to the application, he/she can then assign this user to a location and set the necessary privileges. The user will only be able to create and view parts if he/she is assigned to a location, also note that users may be assigned to more than one location.
- Invoice: Allows the user to create, send and view invoices
- Company Administrator: The Administrator can give administrator rights to another user.

Deactivate a User or Delete a Location

- Once a user is assigned to a location, the Administrator has the ability to activate/deactivate that user or remove (delete) any location(s) associated with the user.

- Please follow the instructions on the next slide.

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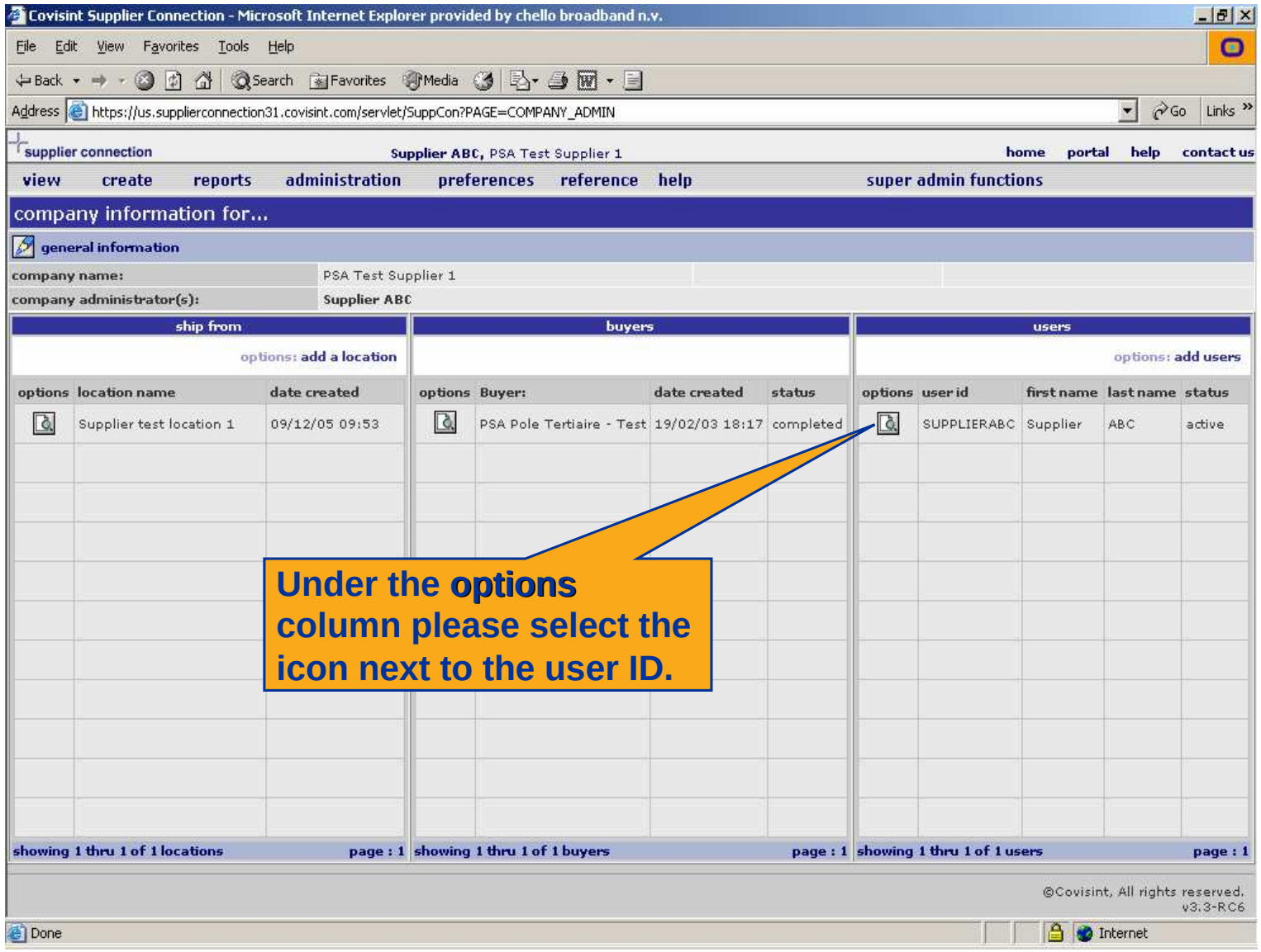

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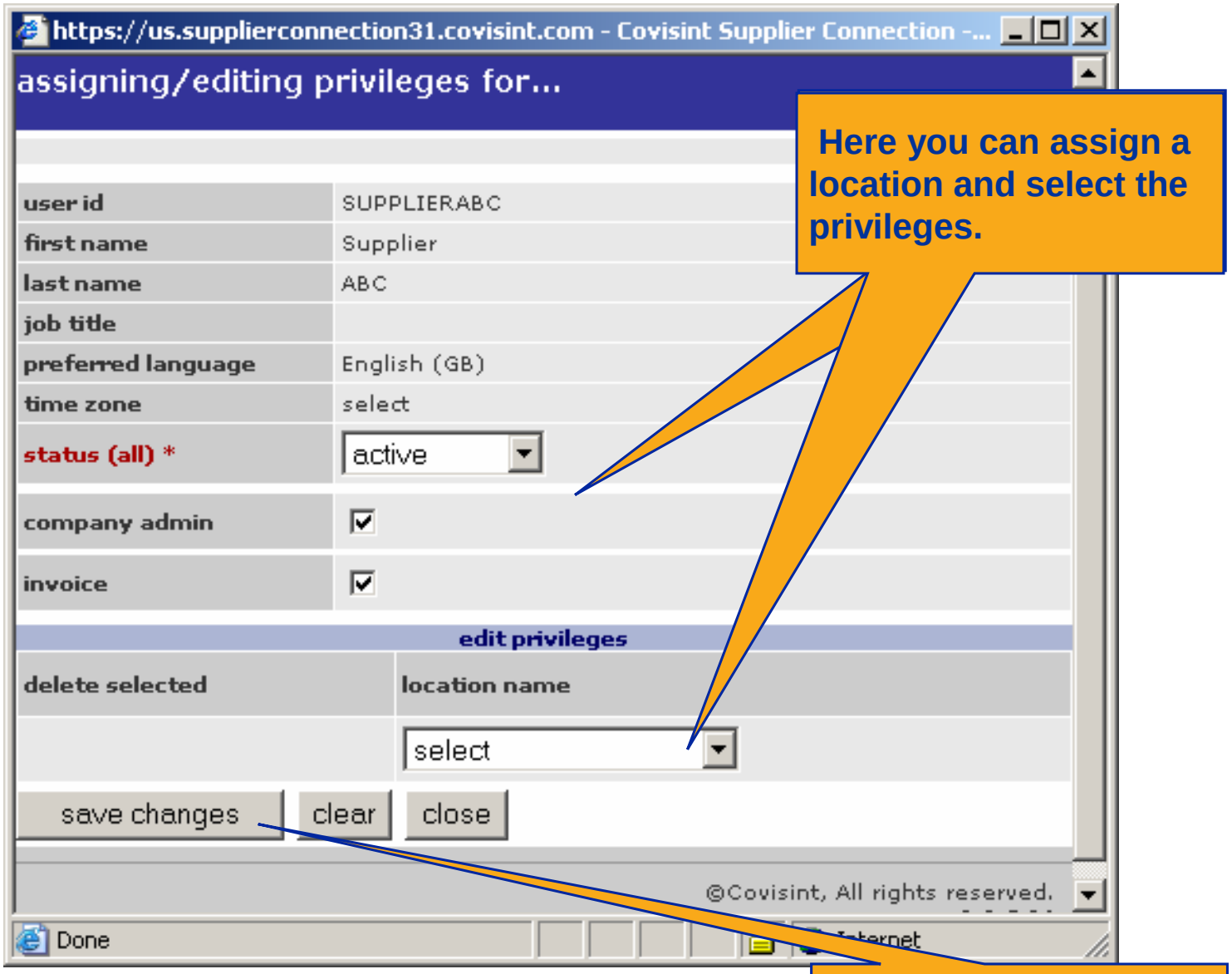

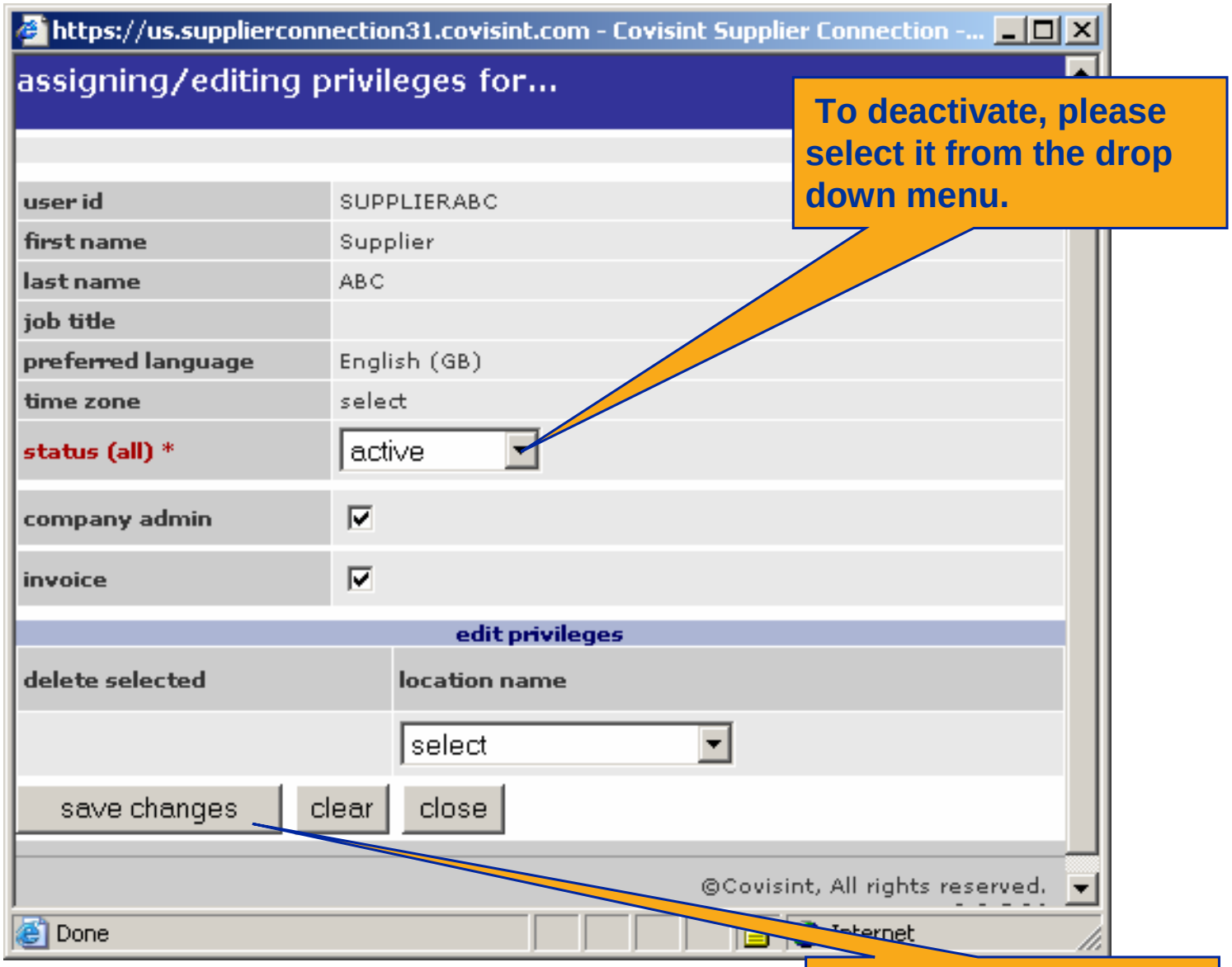
https://us.supplierconnection31.covisint.com - Covisint Supplier Connection -...
assigning/editing privileges for...
user id
SUPPLIERABC
first name
Supplier
last name
ABC
job title
preferred language
English (GB)
time zone
select
status (all) *
active
company admin
invoice
edit privileges
delete selected
location name
select
save changes
clear
close
©Covisint, All rights reserved.
Done
Internet
To deactivate, please select it from the drop down menu.
Select save changes then close

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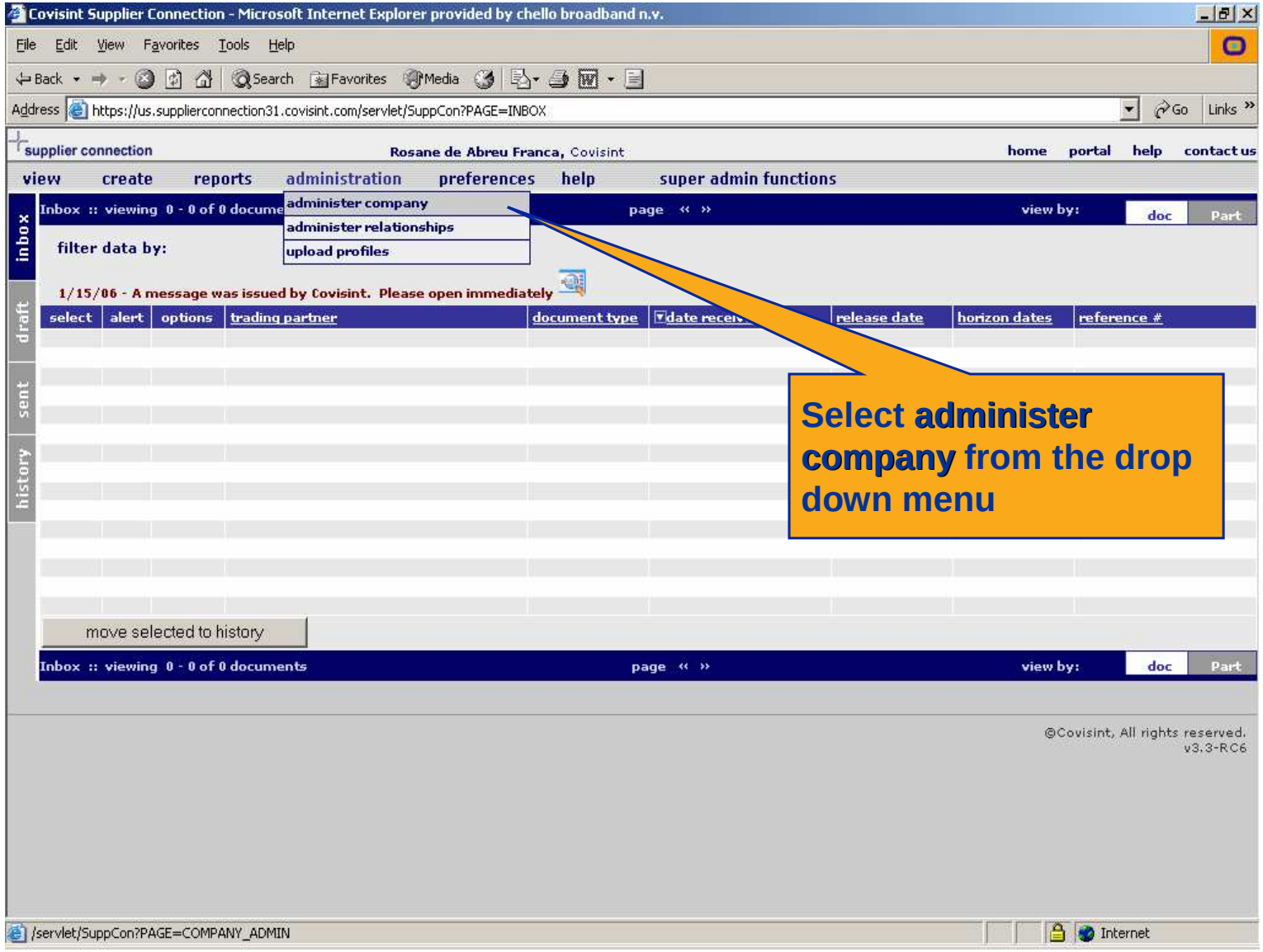
Trading Partner Management


Covisint Supplier Connection - Microsoft Internet Explorer provided by chello broadband n.v.
File Edit View Favorites Tools Help
Back Search Favorites Media
Address https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=INBOX
Go Links
supplier connection
Rosane de Abreu Franca, Covisint
home portal help contact us
view create reports administration preferences help super admin functions
administer company
administer relationships
upload profiles
inbox draft sent history
Inbox :: viewing 0 - 0 of 0 docume
page « »
view by: doc Part
filter data by:
1/15/06 - A message was issued by Covisint. Please open immediately
select alert options trading partner document type date receiv release date horizon dates reference #
move selected to history
Inbox :: viewing 0 - 0 of 0 documents
page « »
view by: doc Part
Select administer company from the drop down menu
©Covisint, All rights reserved.
v3.3-RC6
/servlet/SuppCon?PAGE=COMPANY_ADMIN
Internet

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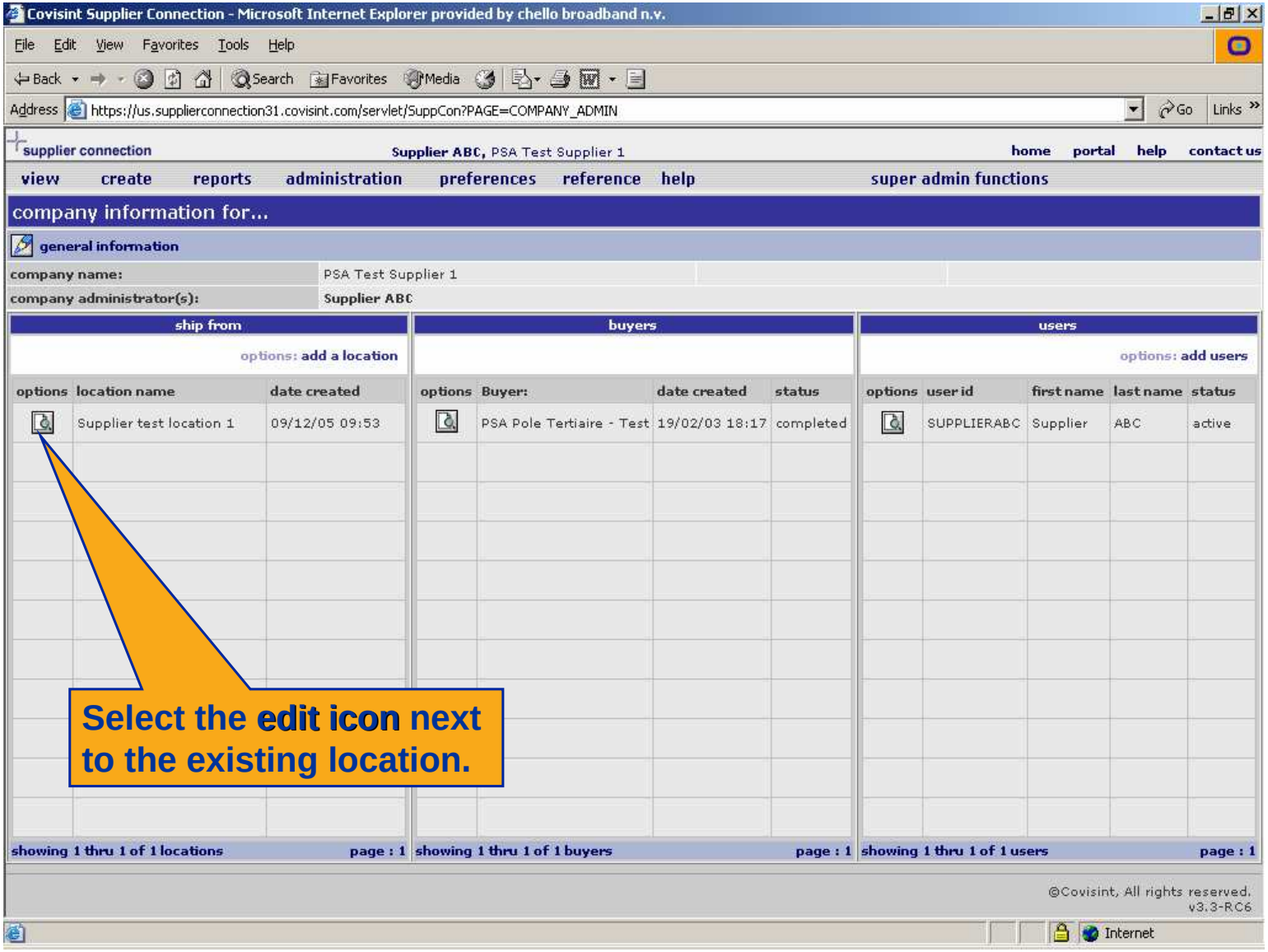

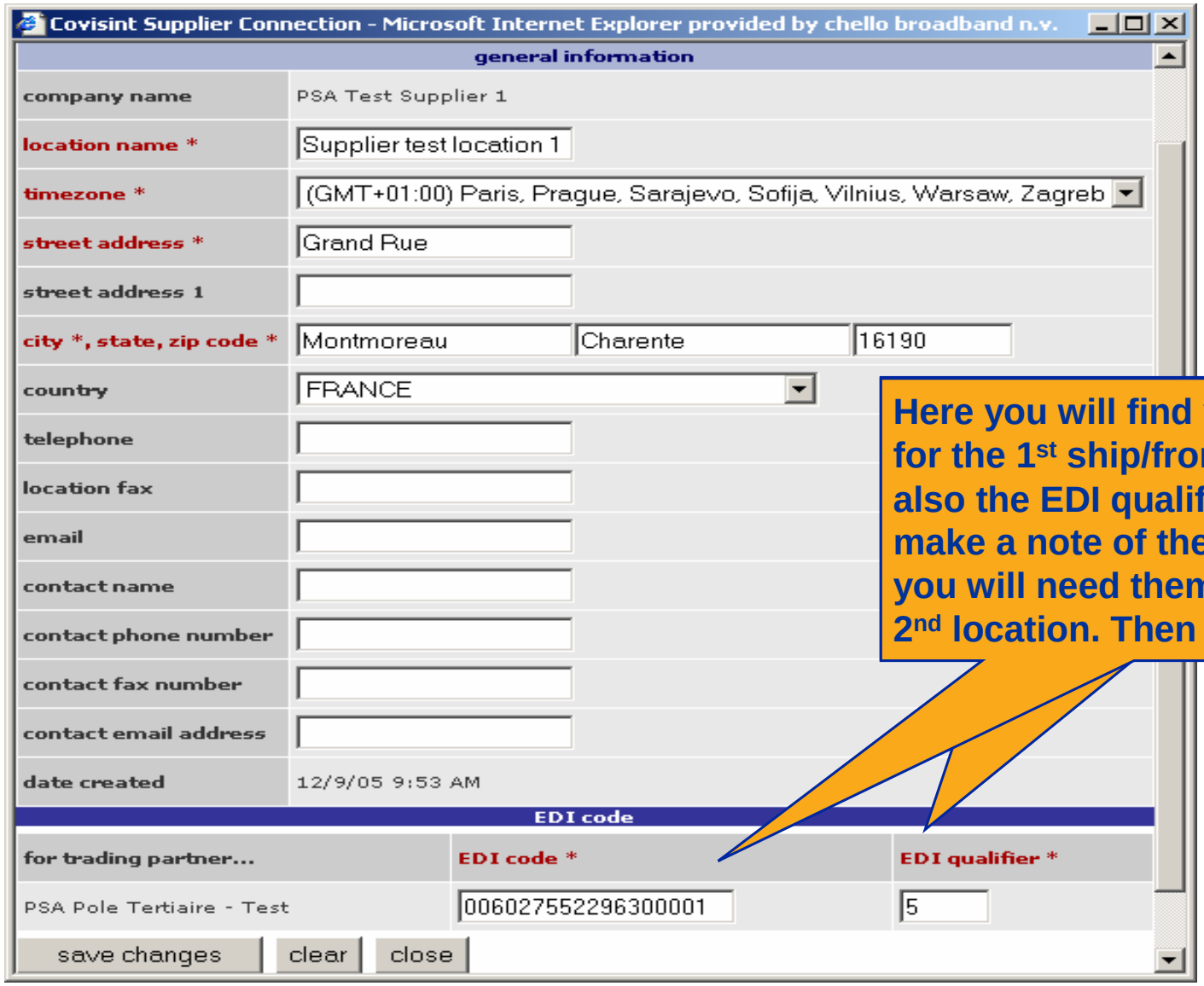
Covisint Supplier Connection - Microsoft Internet Explorer provided by chello broadband n.v.
general information
company name
PSA Test Supplier 1
location name *
Supplier test location 1
timezone *
(GMT+01:00) Paris, Prague, Sarajevo, Sofija, Vilnius, Warsaw, Zagreb
street address *
Grand Rue
street address 1
city *, state, zip code *
Montmoreau
Charente
16190
country
FRANCE
telephone
location fax
email
contact name
contact phone number
contact fax number
contact email address
date created
12/9/05 9:53 AM
EDI code
for trading partner...
EDI code *
EDI qualifier *
PSA Pole Tertiaire - Test
006027552296300001
5
save changes
clear
close
Here you will find your EDI code for the 1st ship/from location and also the EDI qualifier. Please make a note of these numbers as you will need them to create the 2nd location. Then select close

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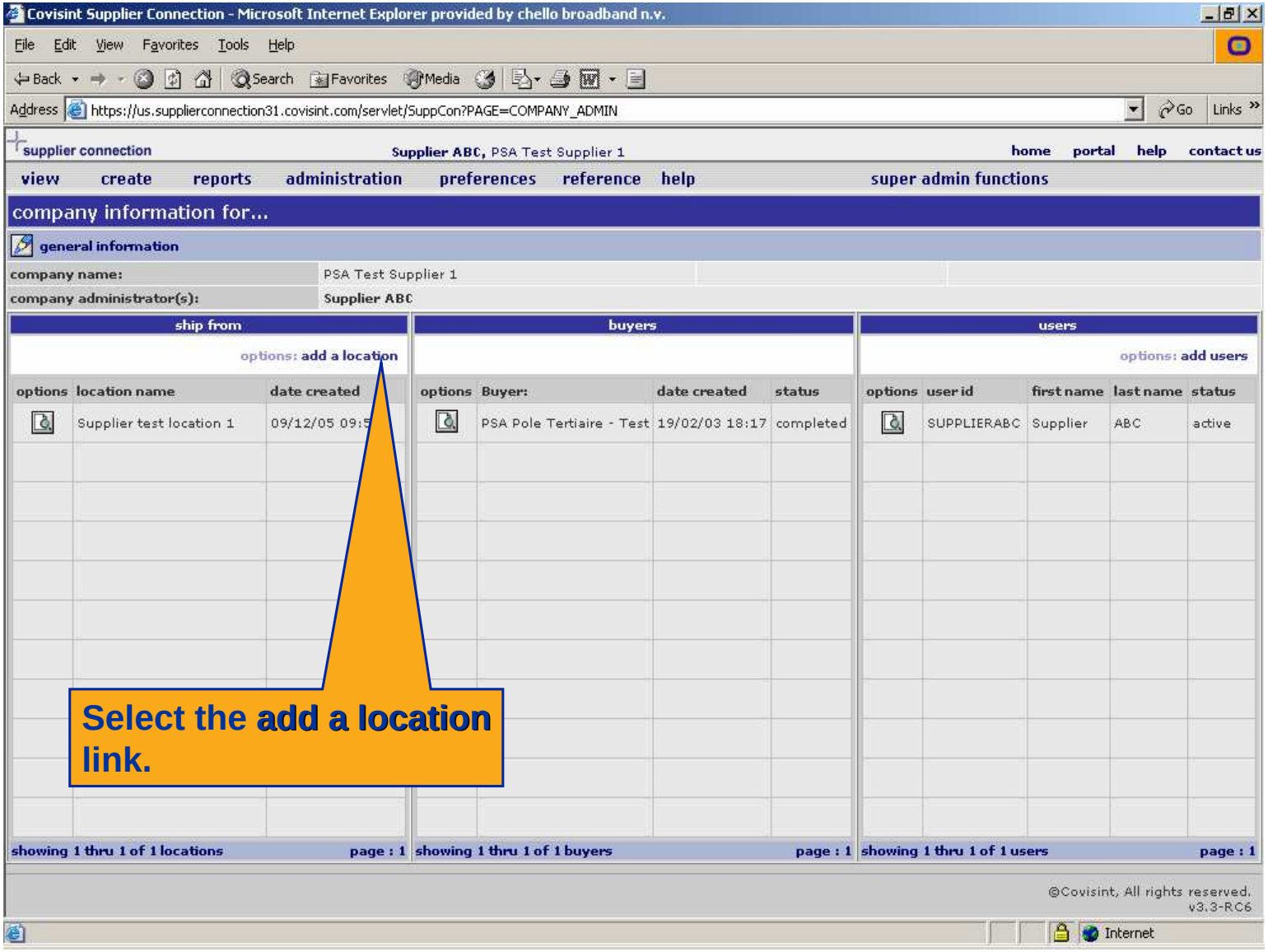

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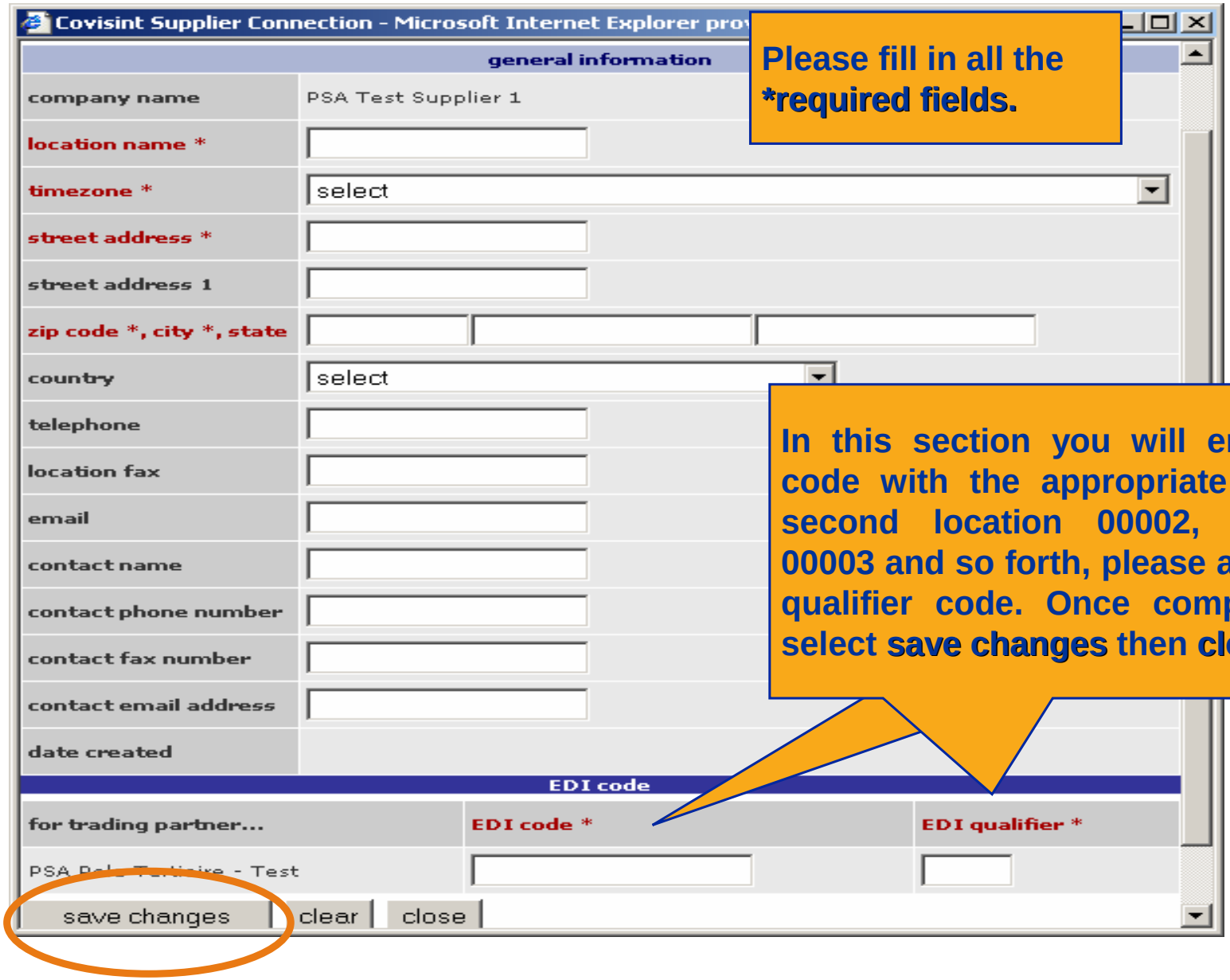
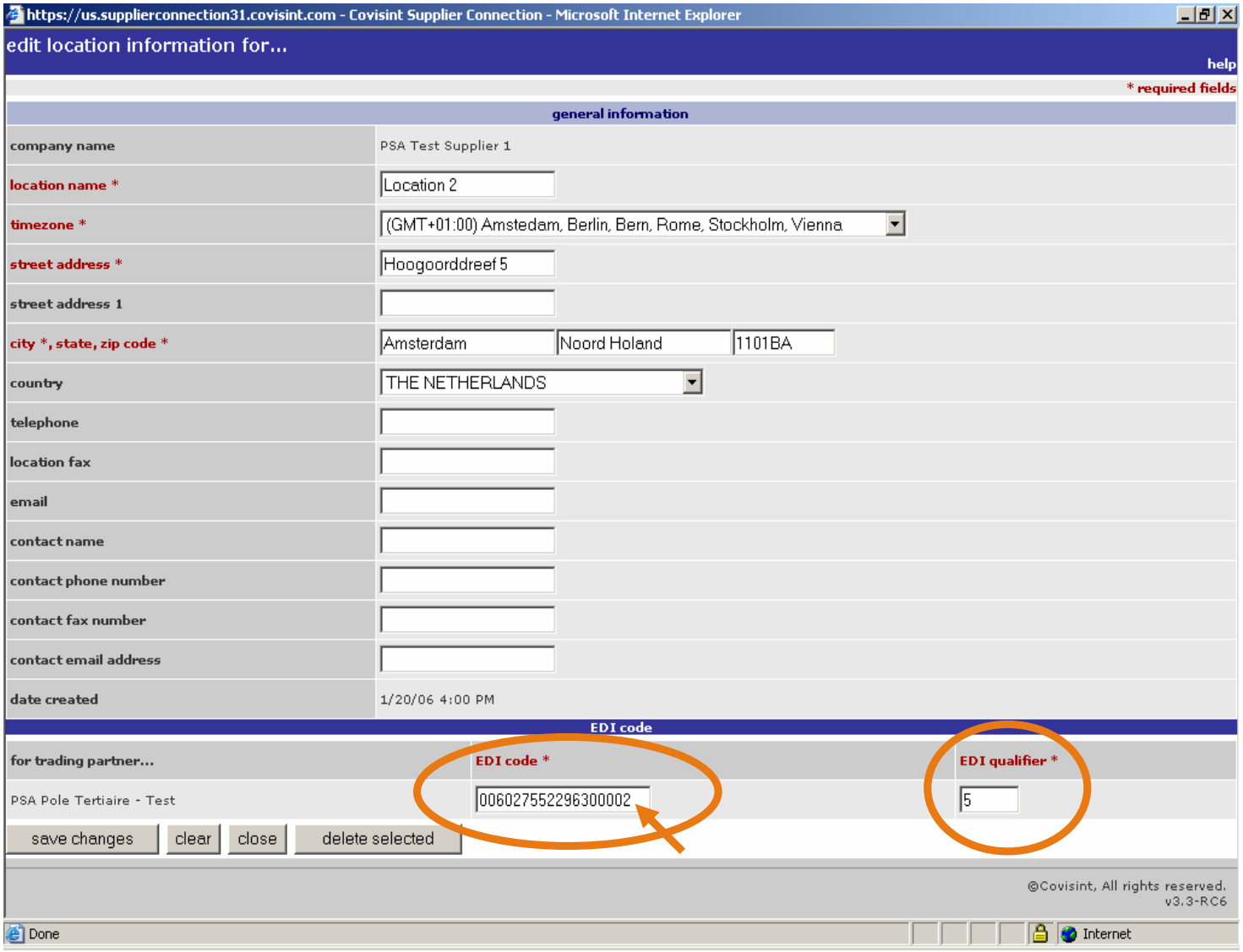


Please fill in all the *required fields.

In this section you will enter the EDI code with the appropriate final digits, second location 00002, 3rd location 00003 and so forth, please also enter the qualifier code. Once complete, please select save changes then close


https://us.supplierconnection31.covisint.com - Covisint Supplier Connection - Microsoft Internet Explorer
edit location information for...
help
* required fields
general information
company name
PSA Test Supplier 1
location name *
Location 2
timezone *
(GMT+01:00) Amstedam, Berlin, Bern, Rome, Stockholm, Vienna
street address *
Hoogoorddreef 5
street address 1
city *, state, zip code *
Amsterdam
Noord Holand
1101BA
country
THE NETHERLANDS
telephone
location fax
email
contact name
contact phone number
contact fax number
contact email address
date created
1/20/06 4:00 PM
EDI code
for trading partner...
EDI code *
EDI qualifier *
PSA Pole Tertiaire - Test
006027552296300002
5
save changes
clear
close
delete selected
©Covisint, All rights reserved.
v3.3-RC6
Done
Internet

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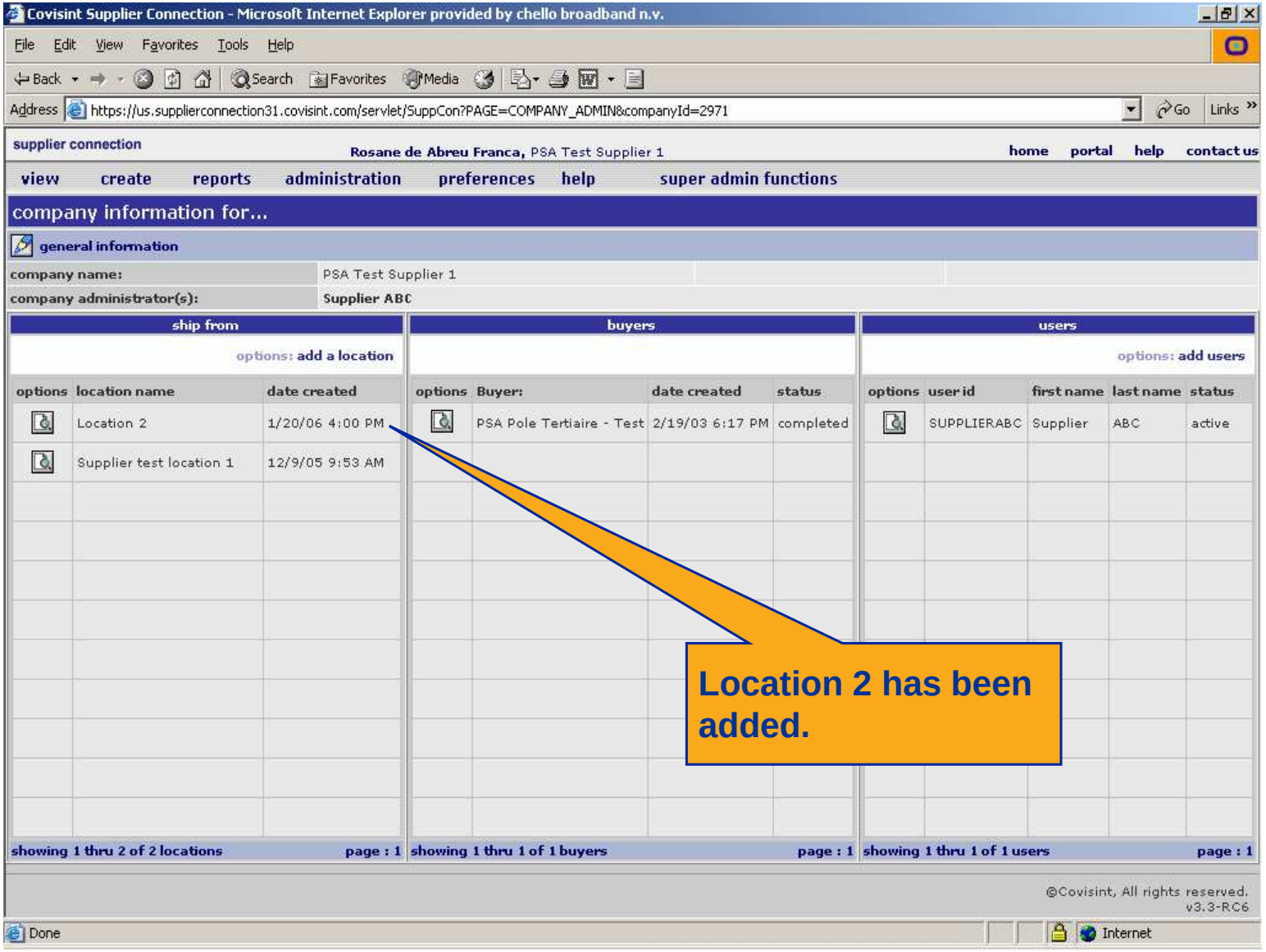

Step 4 Trading partner management

Mailbox code

- These are mandatory codes (mailbox/hub ID for VAN, ISDN, B2B, etc.) for the proper document interchange between a buyer mailbox and a supplier mailbox (Covisint mailbox). This code field appears on the buyer, supplier and/or location level dependent on the buyer specifications.
- In addition the MAILBOX code can be document type specific (in most cases this will be only a buyer side specific field).

Establishing trading partner relationship

- Mailbox codes are set-up on a relationship (i.e. company and/or location) level; relationships and mailbox codes will be initialized automatically by incoming messages (DELJIT).
- Please see examples in the next slides.

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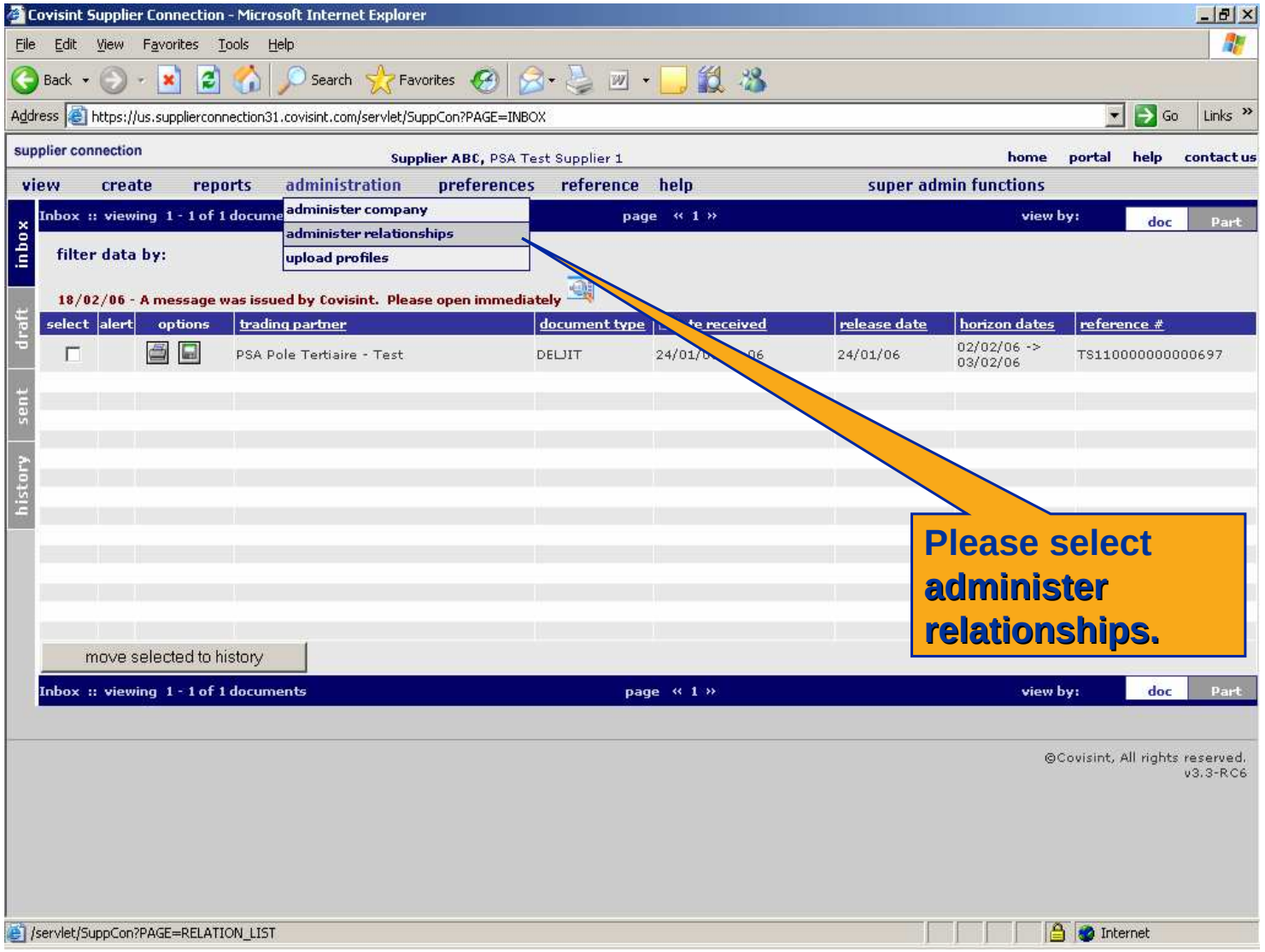

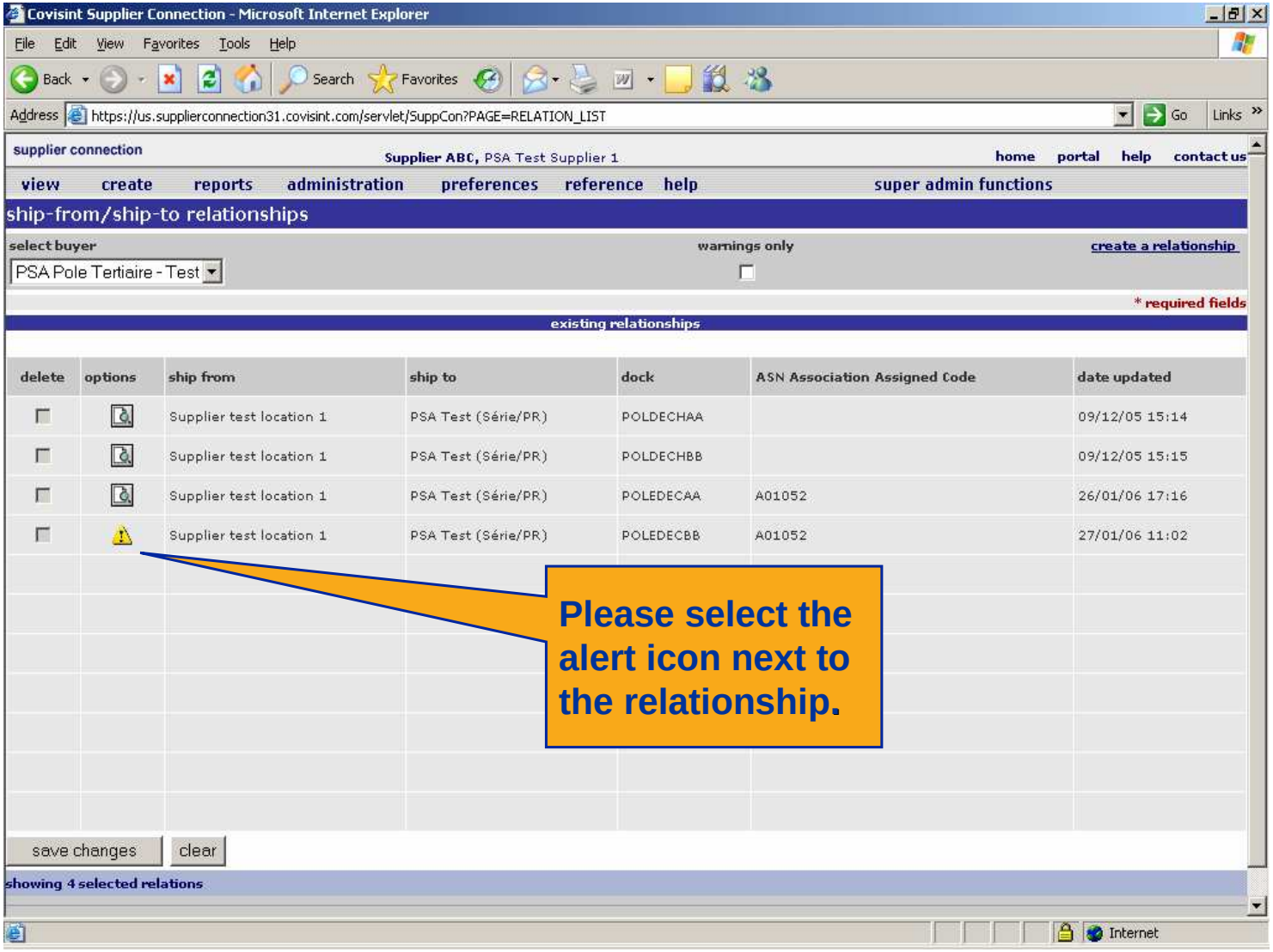
Covisint Supplier Connection - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=RELATION_LIST
Go Links
supplier connection
Supplier ABC, PSA Test Supplier 1
home portal help contact us
view create reports administration preferences reference help super admin functions
ship-from/ship-to relationships
select buyer
PSA Pole Tertiaire - Test
warnings only
create a relationship
* required fields
existing relationships
delete options ship from ship to dock ASN Association Assigned Code date updated
Supplier test location 1 PSA Test (Série/PR) POLDECHAA 09/12/05 15:14
Supplier test location 1 PSA Test (Série/PR) POLDECHBB 09/12/05 15:15
Supplier test location 1 PSA Test (Série/PR) POLEDECAA A01052 26/01/06 17:16
Supplier test location 1 PSA Test (Série/PR) POLEDECBB A01052 27/01/06 11:02
Please select the alert icon next to the relationship.
save changes
clear
showing 4 selected relations
Internet

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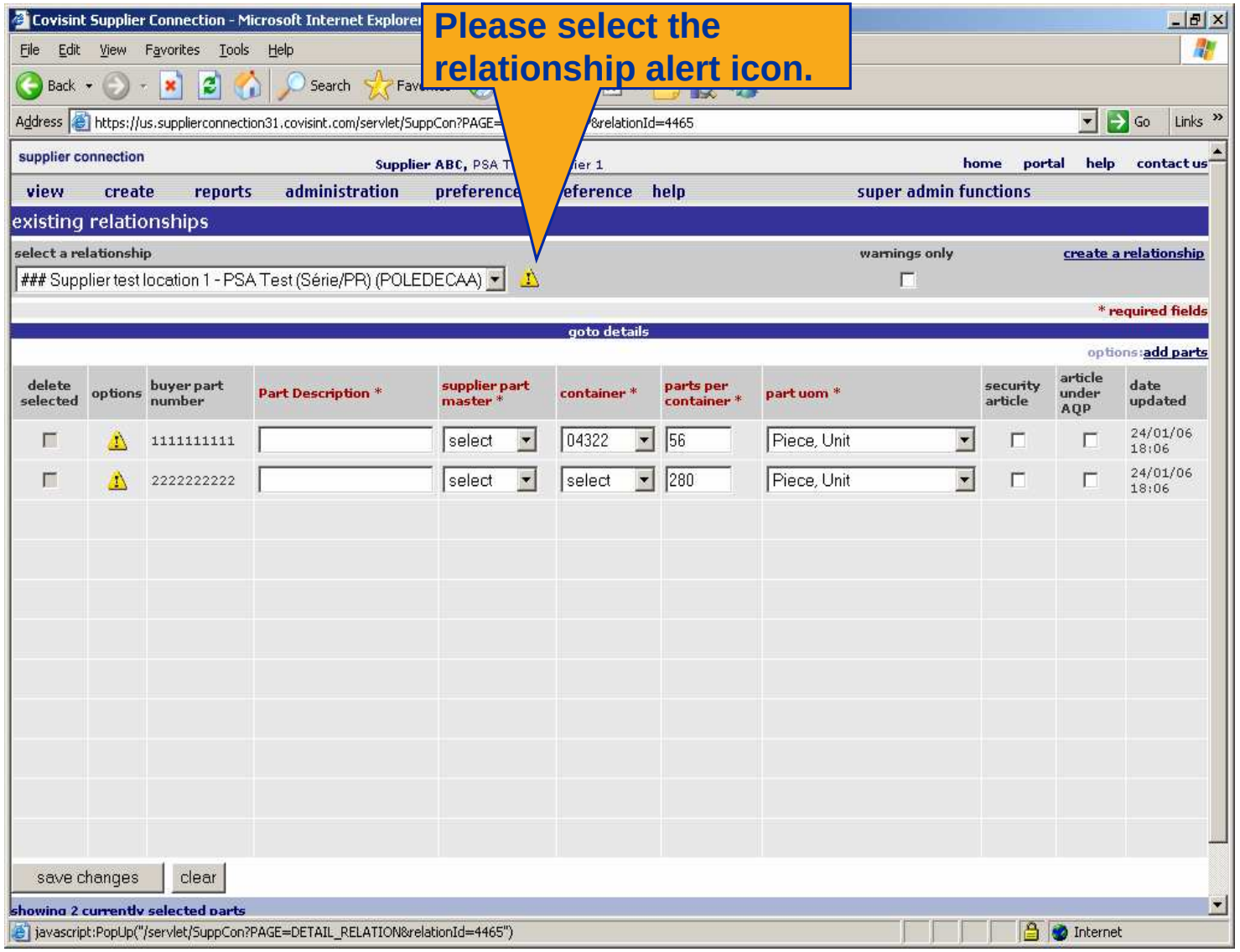

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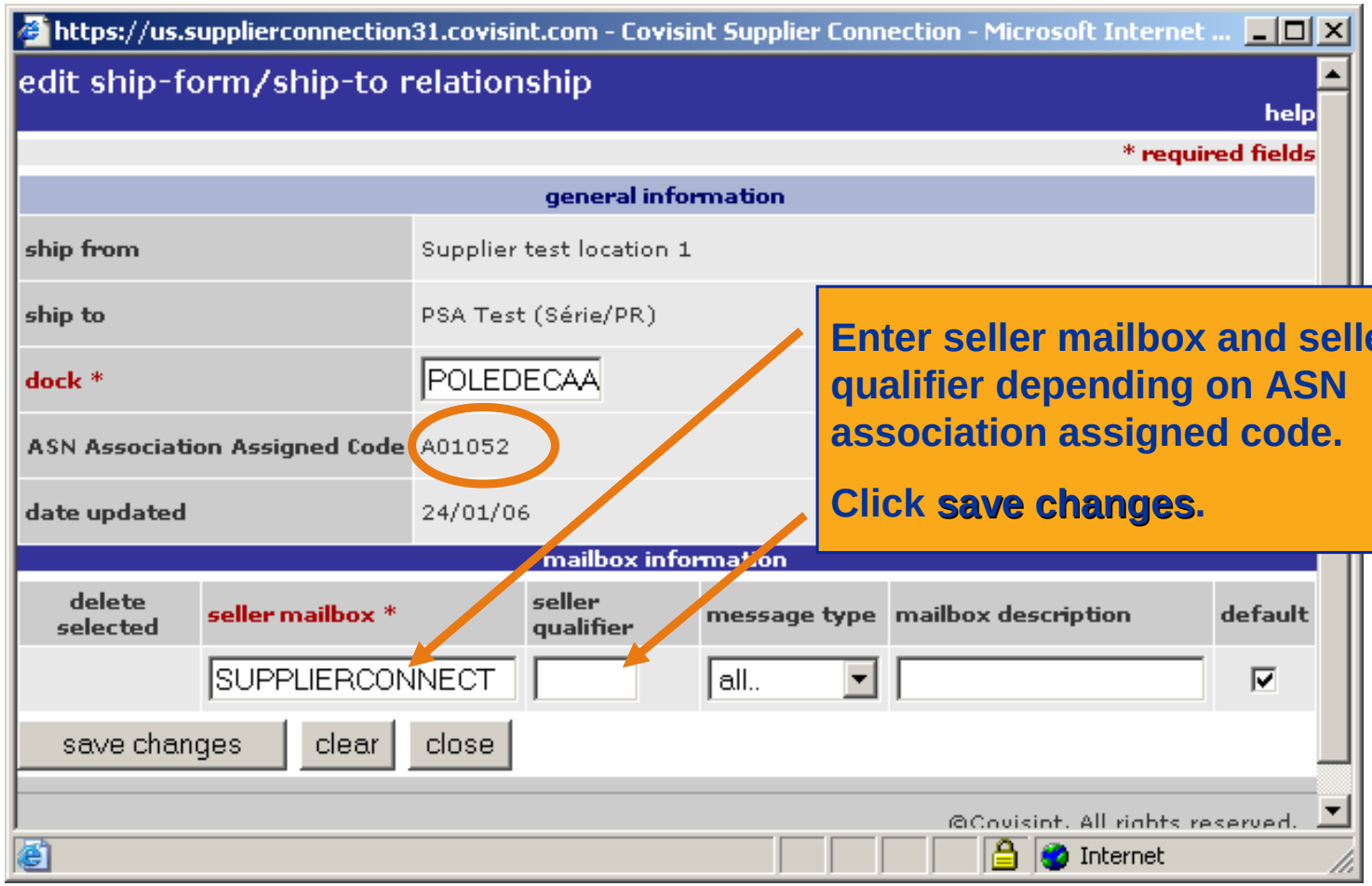

Enter seller mailbox and seller qualifier depending on ASN association assigned code.

Click save changes.

RULES :

If Association Assigned Code = A01051 then: Mailbox = 003609786, Qualifier = 1
(this is the V1 set-up)

If Association Assigned Code = A01052 then: Mailbox = SUPPLIERCONNECT, Qualifier is left blank
(this is the V2 set-up)

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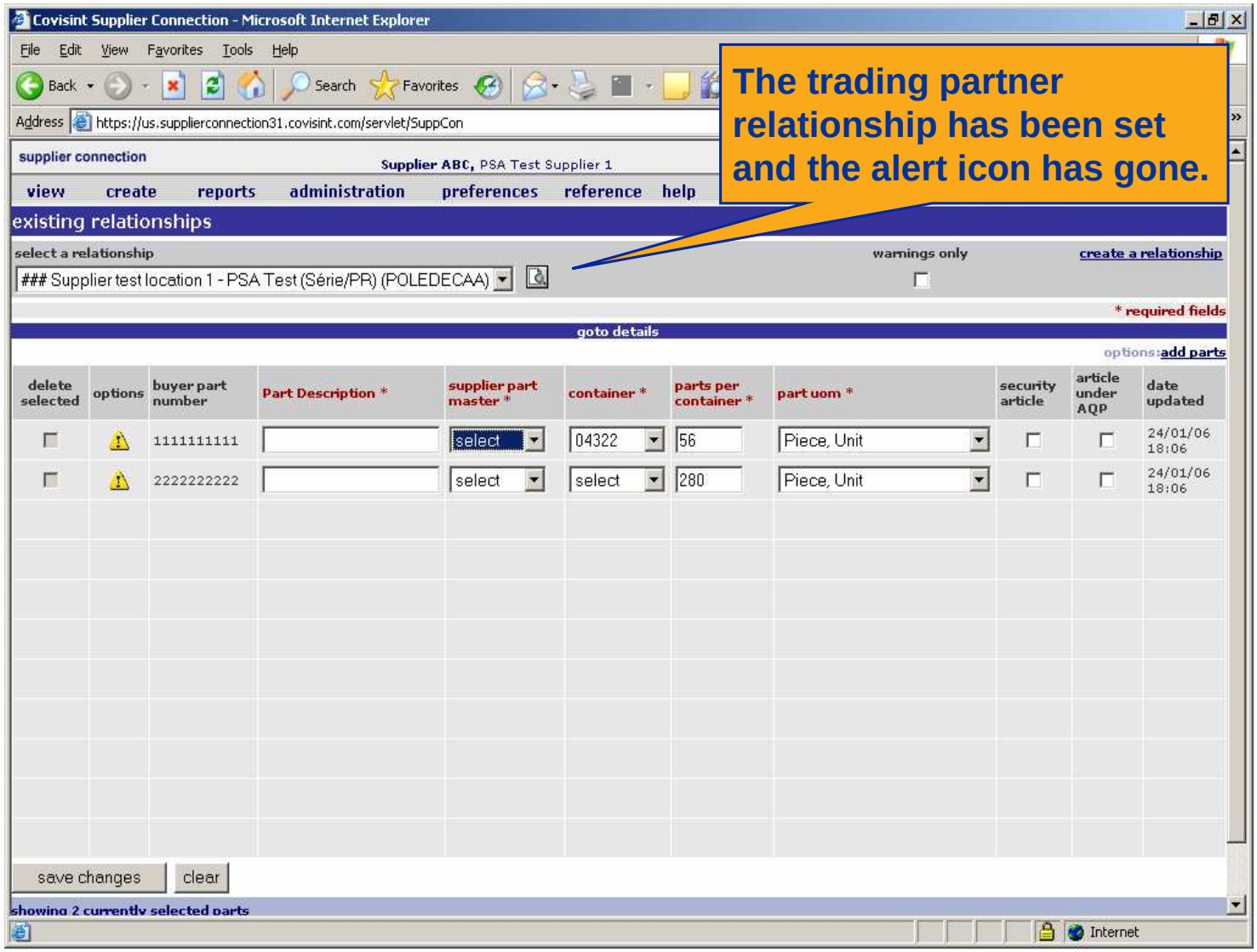

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Filter options and reporting

Step 5 Filter options and reporting

In this step you will learn how to use the filter options and generate reports.

Filter options

- Document type
- Trading Partner
- Ship from
- Requirement Date
- Part Reference

Report Options

- Mailbox activity
- Transaction log

Please follow the instructions on the next slides.

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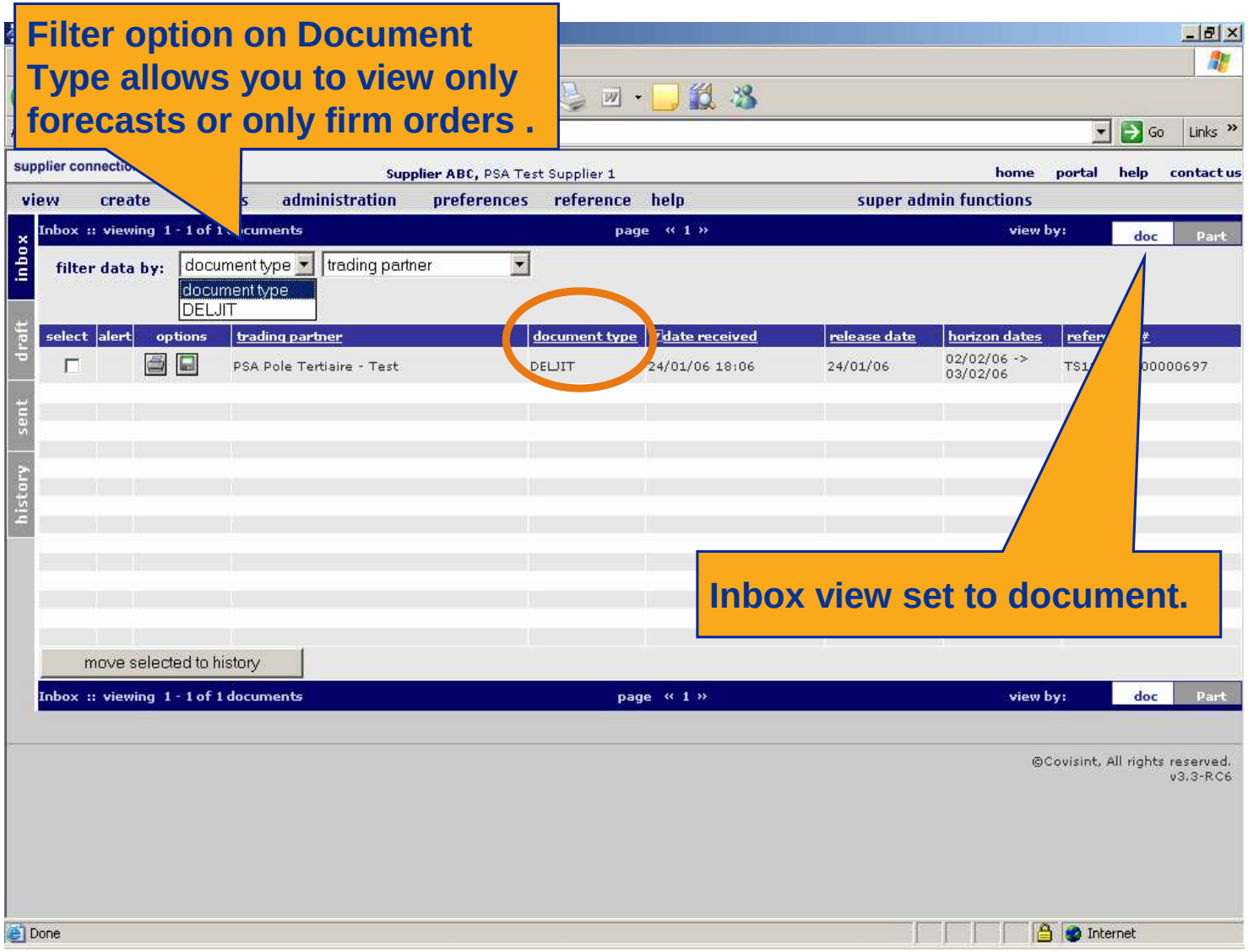

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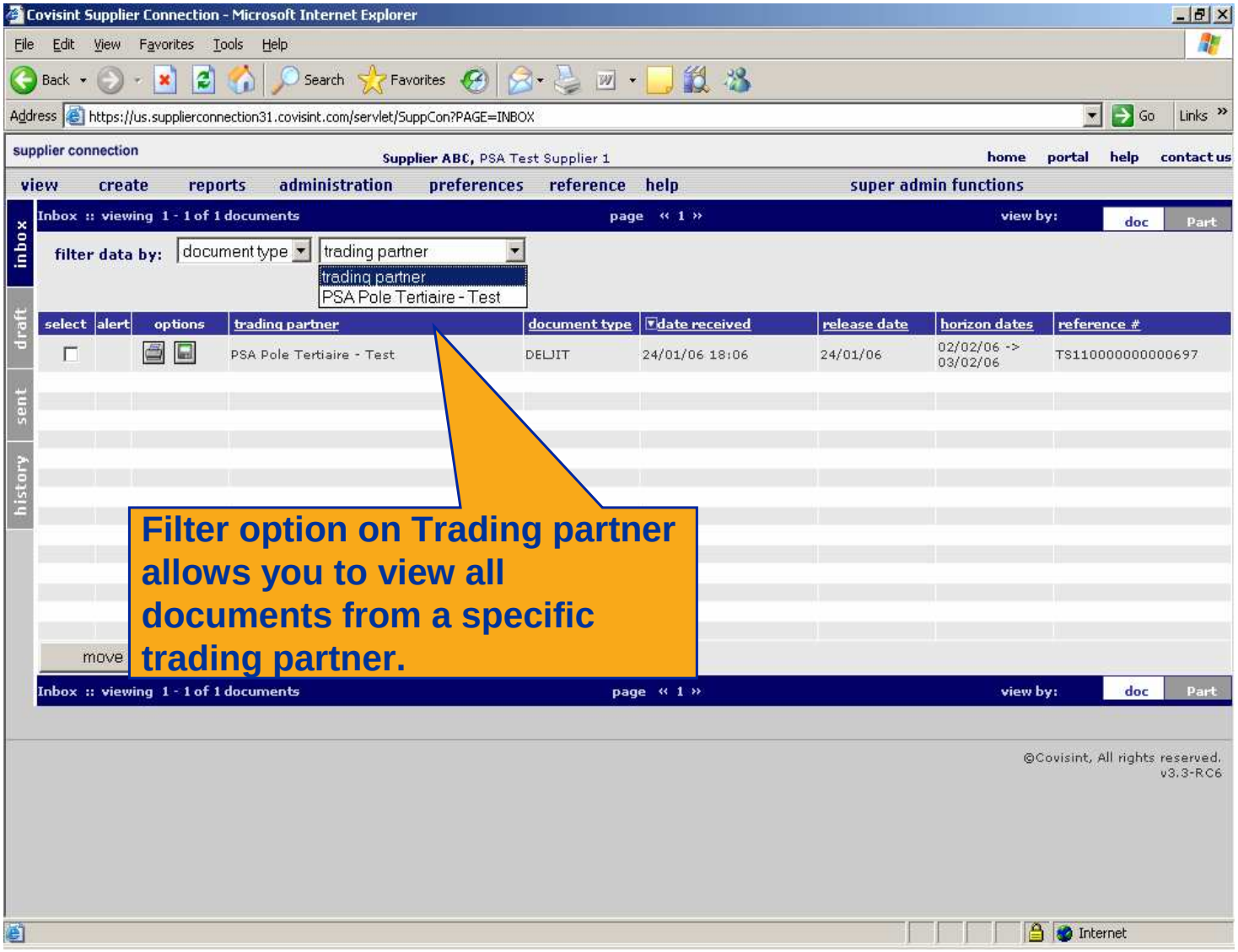

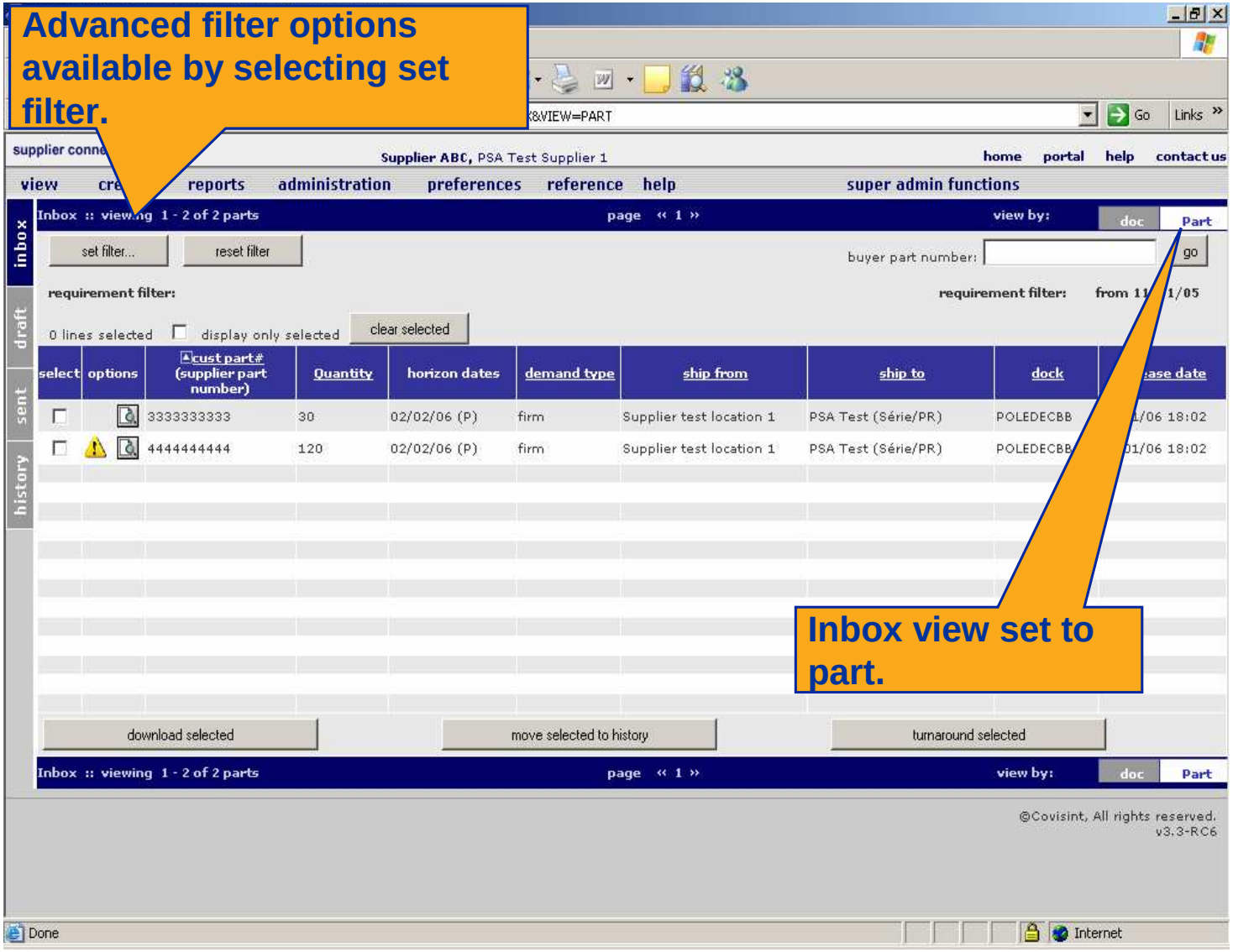
Advanced filter options available by selecting set filter.
Supplier ABC, PSA Test Supplier 1
home portal help contact us
view reports administration preferences reference help super admin functions
inbox draft sent history
Inbox :: viewing 1 - 2 of 2 parts
page « 1 »
view by: doc Part
set filter... reset filter
buyer part number: go
requirement filter:
requirement filter: from 11/1/05
0 lines selected display only selected clear selected
select options cust part# (supplier part number) Quantity horizon dates demand type ship from ship to dock ease date
3333333333 30 02/02/06 (P) firm Supplier test location 1 PSA Test (Série/PR) POLEDECBB 1/06 18:02
4444444444 120 02/02/06 (P) firm Supplier test location 1 PSA Test (Série/PR) POLEDECBB 01/06 18:02
Inbox view set to part.
download selected
move selected to history
turnaround selected
Inbox :: viewing 1 - 2 of 2 parts
page « 1 »
view by: doc Part
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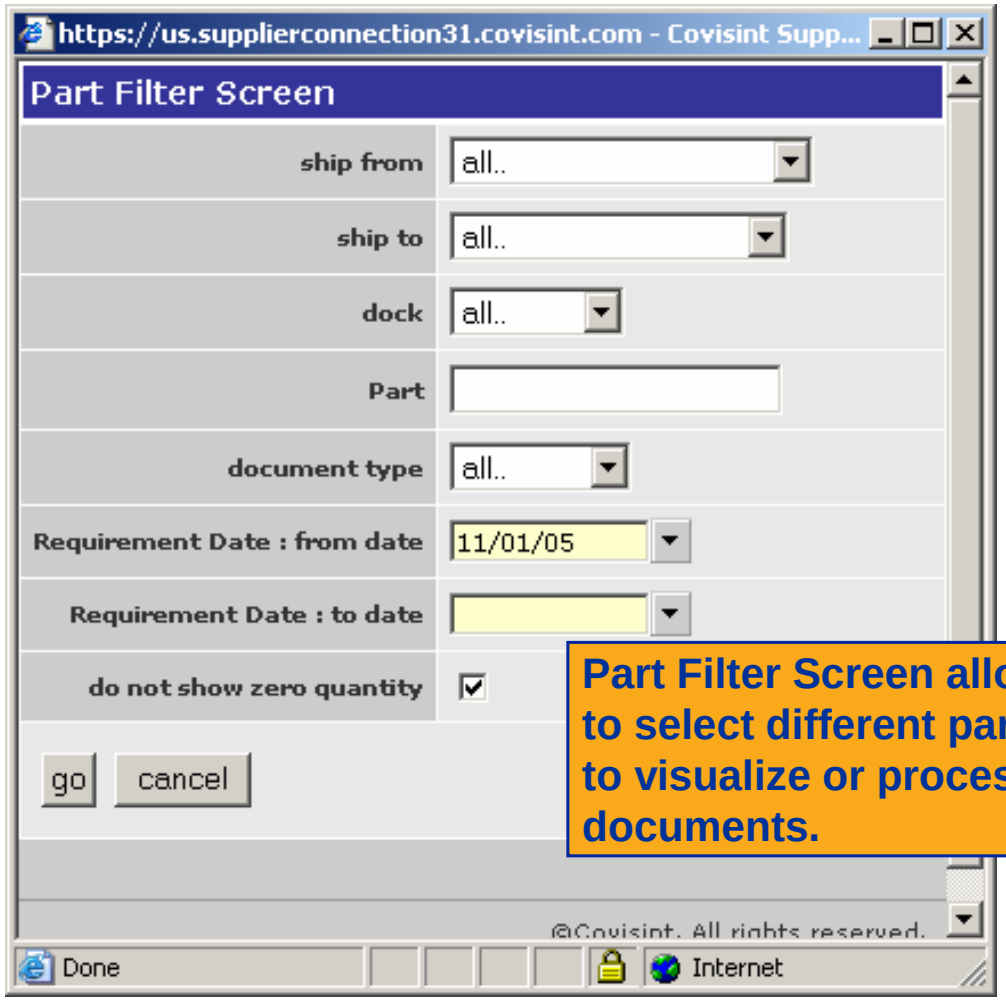
v3.3-RC6
Done
Internet



Part Filter Screen allows you to select different parameters to visualize or process documents.

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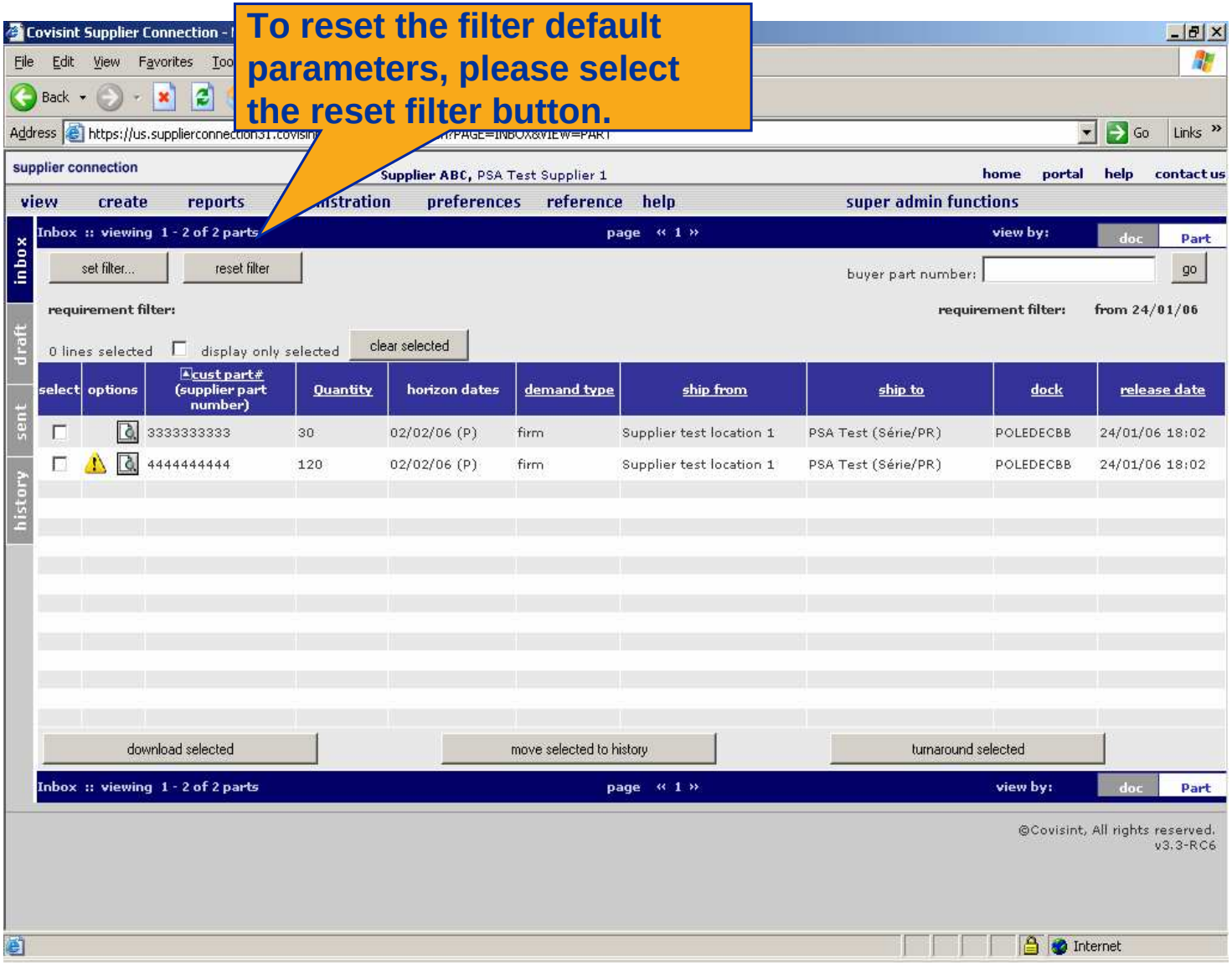

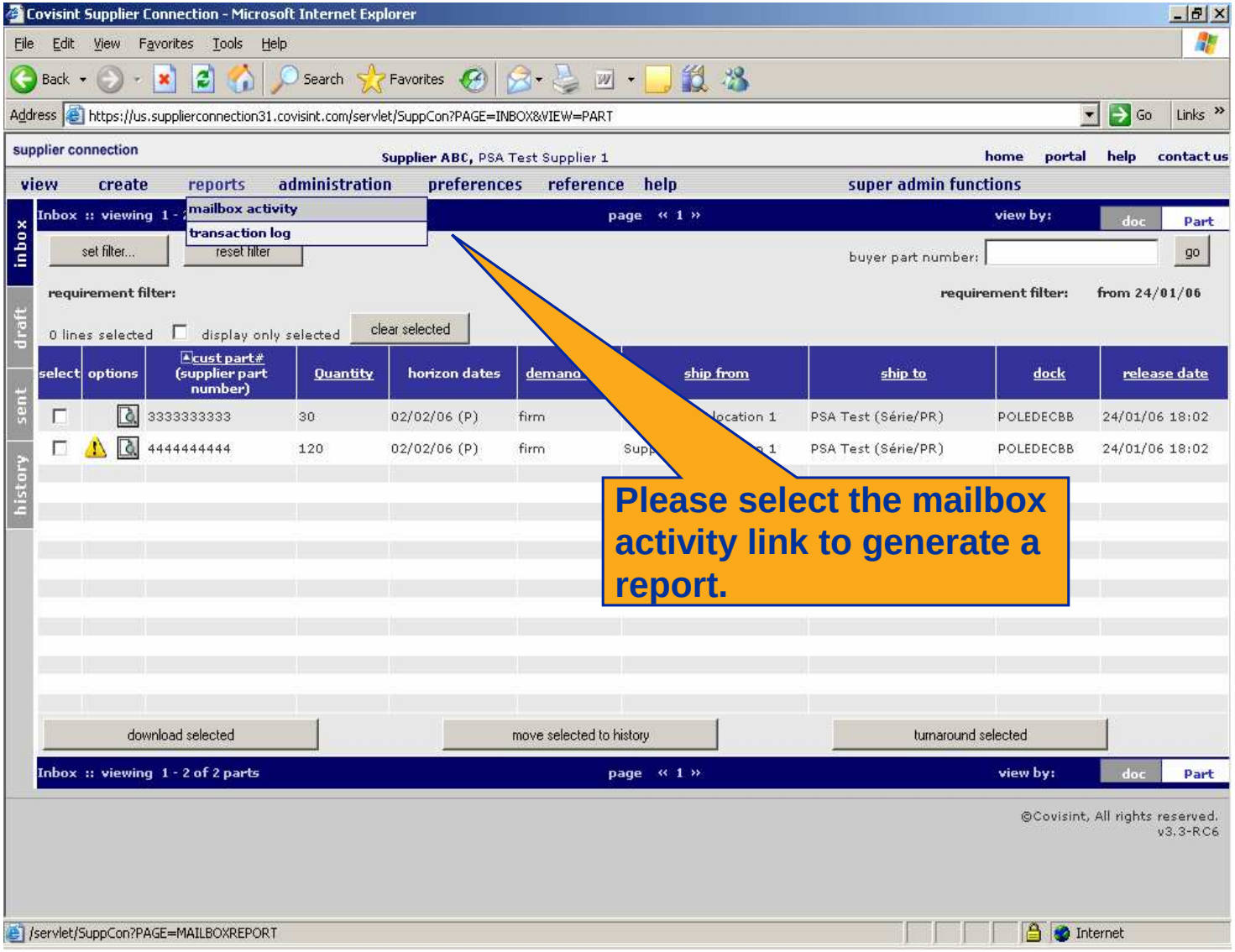
Covisint Supplier Connection - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=INBOX&VIEW=PART
Go Links
supplier connection
Supplier ABC, PSA Test Supplier 1
home portal help contact us
view create reports administration preferences reference help
super admin functions
mailbox activity
transaction log
inbox
draft
sent
history
Inbox :: viewing 1 -
page « 1 »
view by: doc Part
set filter...
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go
requirement filter:
requirement filter: from 24/01/06
0 lines selected
display only selected
clear selected
select options cust part# (supplier part number) Quantity horizon dates demand ship from ship to dock release date
3333333333 30 02/02/06 (P) firm location 1 PSA Test (Série/PR) POLEDECBB 24/01/06 18:02
4444444444 120 02/02/06 (P) firm Supp 1 PSA Test (Série/PR) POLEDECBB 24/01/06 18:02
Please select the mailbox activity link to generate a report.
download selected
move selected to history
turnaround selected
Inbox :: viewing 1 - 2 of 2 parts
page « 1 »
view by: doc Part
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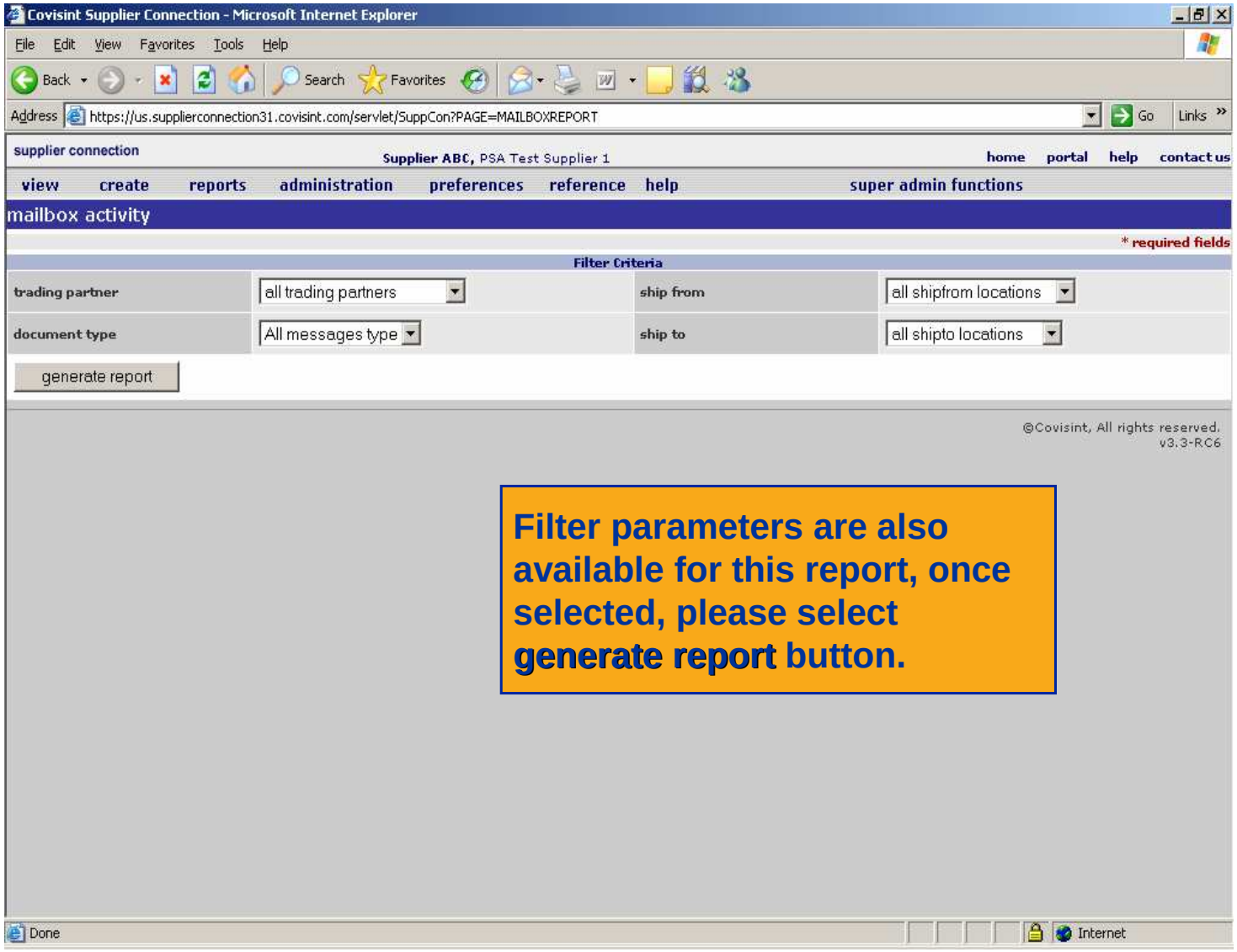
v3.3-RC6
/servlet/SuppCon?PAGE=MAILBOXREPORT
Internet


Covisint Supplier Connection - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=MAILBOXREPORT
Go Links
supplier connection
Supplier ABC, PSA Test Supplier 1
home portal help contact us
view create reports administration preferences reference help super admin functions
mailbox activity
* required fields
Filter Criteria
trading partner
all trading partners
ship from
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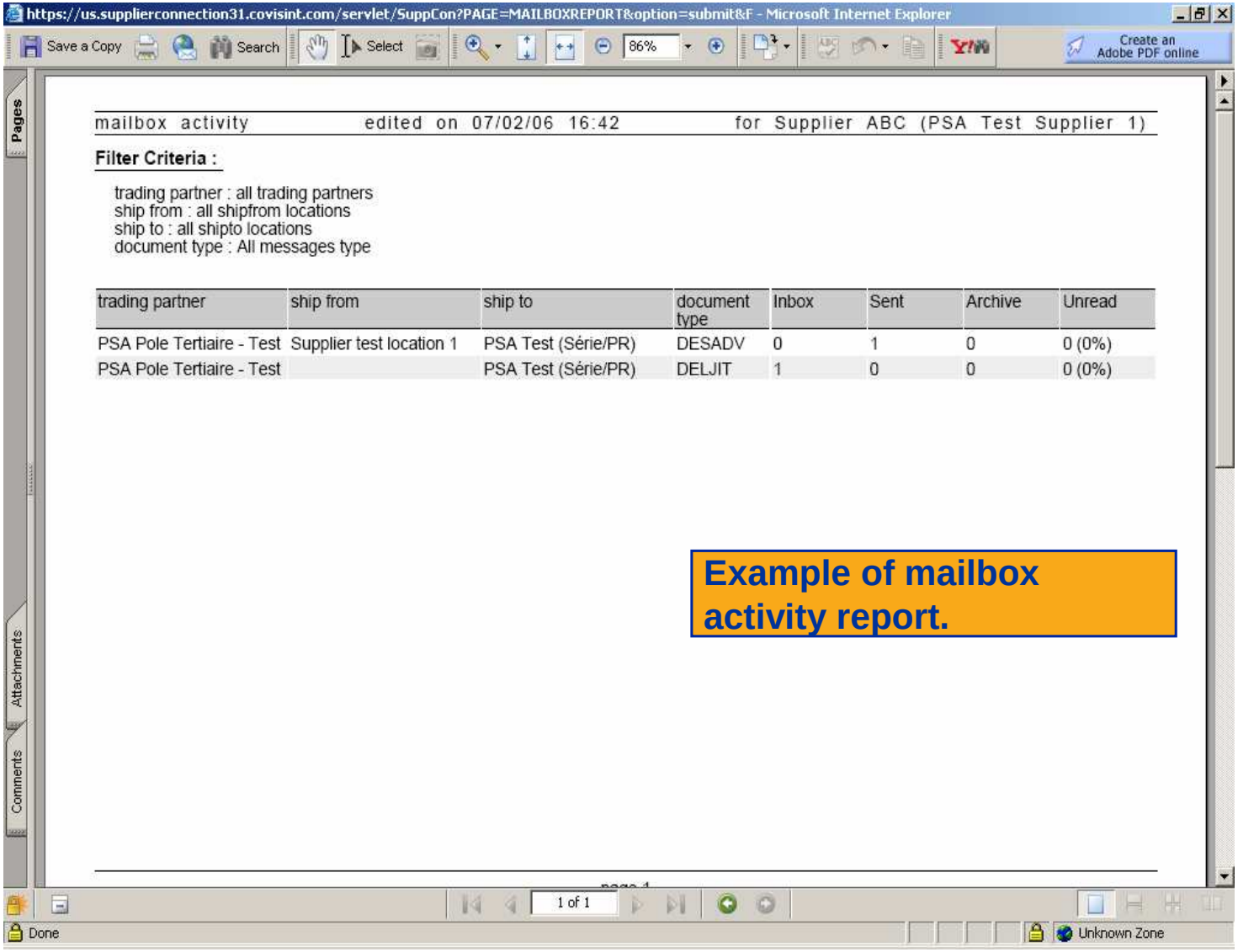
v3.3-RC6
Filter parameters are also available for this report, once selected, please select generate report button.
Done
Internet



Example of mailbox activity report.

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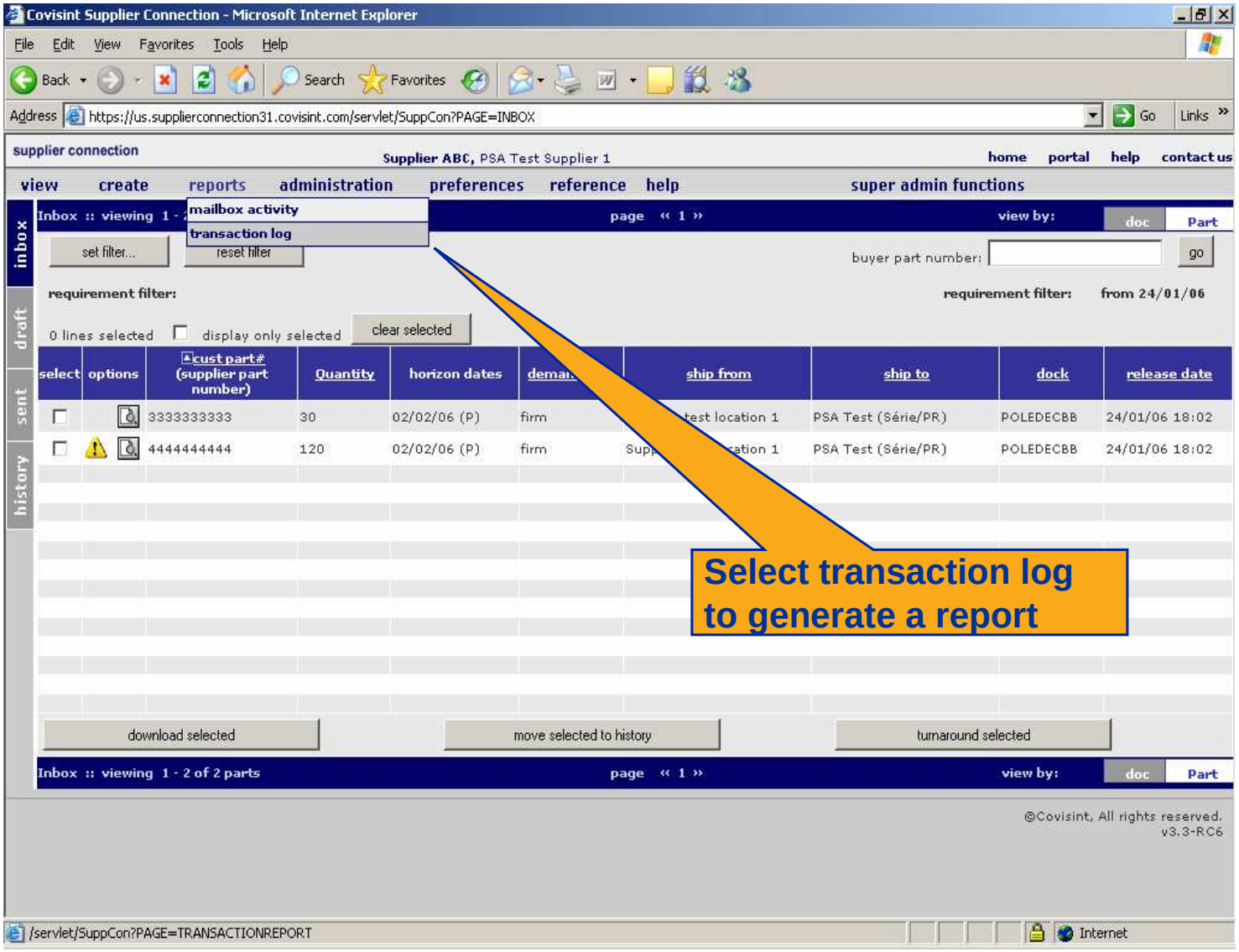

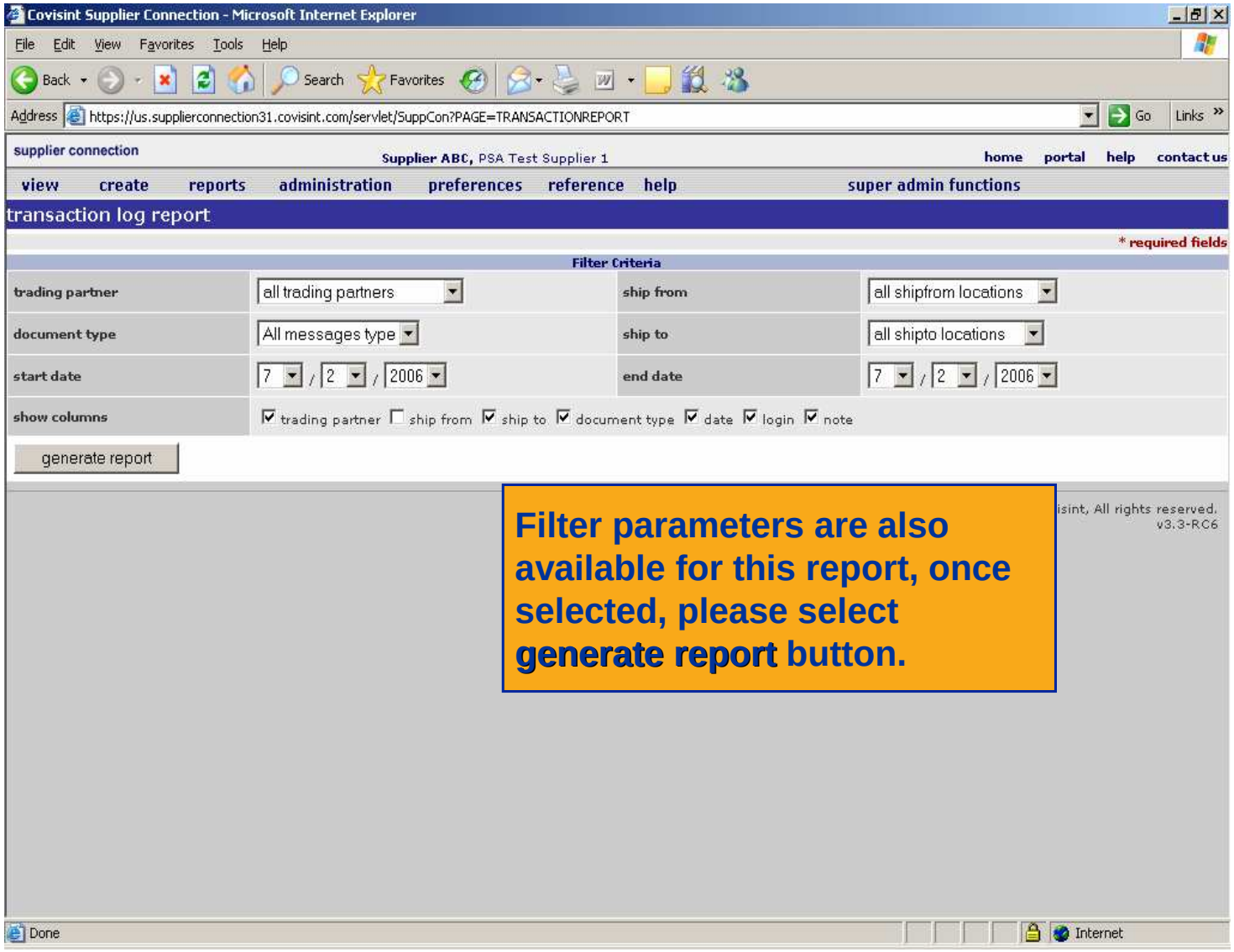
Covisint Supplier Connection - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites
Address https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=TRANSACTIONREPORT
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supplier connection
Supplier ABC, PSA Test Supplier 1
home portal help contact us
view create reports administration preferences reference help super admin functions
transaction log report
* required fields
Filter Criteria
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ship to
all shipto locations
start date
7 / 2 / 2006
end date
7 / 2 / 2006
show columns
trading partner ship from ship to document type date login note
generate report
isint, All rights reserved.
v3.3-RC6
Filter parameters are also available for this report, once selected, please select generate report button.
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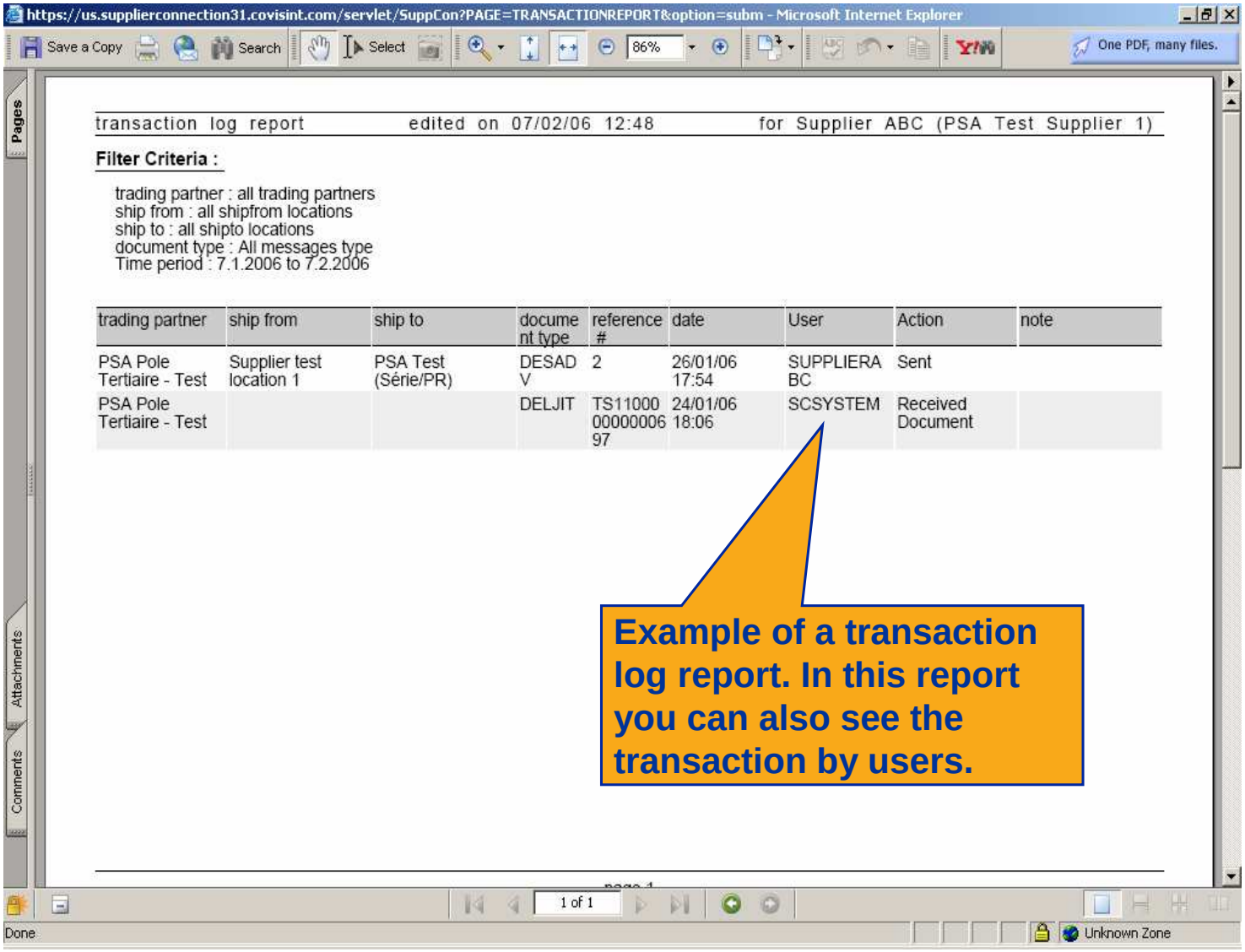
Internet


https://us.supplierconnection31.covisint.com/servlet/SuppCon?PAGE=TRANSACTIONREPORT&option=subm - Microsoft Internet Explorer
Save a Copy
Search
Select
86%
One PDF, many files.
Pages
Attachments
Comments
transaction log report edited on 07/02/06 12:48 for Supplier ABC (PSA Test Supplier 1)
Filter Criteria :
trading partner : all trading partners
ship from : all shipfrom locations
ship to : all shipto locations
document type : All messages type
Time period : 7.1.2006 to 7.2.2006
trading partner | ship from | ship to | document type | reference # | date | User | Action | note
PSA Pole Tertiaire - Test | Supplier test location 1 | PSA Test (Série/PR) | DESADV | 2 | 26/01/06 17:54 | SUPPLIERABC | Sent
PSA Pole Tertiaire - Test | | | DELJIT | TS1100000000000697 | 24/01/06 18:06 | SCSYSTEM | Received Document
Example of a transaction log report. In this report you can also see the transaction by users.
1 of 1
Done
Unknown Zone

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Glossary

Step 6 Glossary

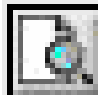
- In the next slides you will find a list of terms used in Supplier Connection that should assist you in using the application.

- Please follow the instructions on the next slide.

Term	Definition
Electronic Data Interchange (EDI)	The computer-to-computer movement of routine business data in an approved standard format.
Location	Second level of administration within a company. Often a plant or other facility at a company.
Functional Acknowledgement	A transaction that is returned to the sender to indicate that a document has been received. Several formats of this transaction exist including the ANSI x 12 format (997) and the EDIFACT format (CONTRL).
Administrator	A role within Supplier Connection. The Administrator is responsible for assigning users to a location and managing the setup process for that location.
Global Navigation Menu	Menu throughout the application, located at the top of the screen drive.
Mailbox Activity Report	This report allows you to view statistics for the inbox, sent and history folders.

Term	Definition
Advance Ship Notice (ASN)	An ASN - a transaction used by the supplier to communicate data pertinent to a shipment. The main purpose of the ship notice is to track shipments and simplify the receiving process. Several formats of this document exist including the ANSI x12 format 856), the EDIFACT format (DESADV) and a Delivery Note.
Company Administrator	A specific role within Supplier Connection. The Company Administrator is responsible for providing setup data to the Covisint Supplier Connection Administrator, location administration, and user administration.
Covisint ID	The identification number (ID) generated by Covisint through the registration process. This ID allows each Covisint user to access their specific Covisint online Internet applications.
Supplier Connection	Supplier Connection enables a customer to send and receive information between trading partners, including supply chain documents such as forecasts, shipping schedules, ship notices and invoices. This allows non-EDI enabled suppliers to electronically communicate critical supply chain data.
Covisint Supplier Connection Administrator	Covisint person that is responsible for adding new companies and a company administrator to the application.

Term	Definition
OEM	Abbreviation for Original Equipment Manufacturer (i.e., DaimlerChrysler, Ford, General Motors, Nissan, Renault, PSA, etc.)
Planning Schedule	Commonly called the material release or forecast, this transaction is used by the buyer to communicate requirement information (part number, quantity, etc.) to a supplier. Several formats of this document exist including the ANSI x12 format (830) and the EDIFACT format (DELFOR).
Purchase Order	A transaction used by the buyer to communicate the demand requirement for a part.
Supplier Vendor Code (PSA – Cofor)	A code (usually allocated by the customer) that identifies the supplier in the applications of the customer. Also known as Internal account number.
Ship Schedule	A transaction used by the buyer to communicate specific shipping and delivery information to a supplier. Several formats of this document exist including the ANSI x12 (862) and the EDIFACT format (DELJIT).
Trading Partner	Counterpart with whom you are doing business, typically at the plant level

Term	Definition
Transaction Log Report	This report allows the user to view the routing history of a document.
Turnaround Ship Notice	The process that allows users to develop an advanced ship notice based on the data contained within the original document, typically a planning schedule or shipping schedule.
User	Company person that is responsible for reading and sending Supplier Connection documents.
View Icon 	View/Edit a detailed screen of the document or part.
WebEDI	The computer-to-browser movement of routine business data. Supplier Connection is also referred to as WebEDI.
XML	Abbreviation for Extensible Markup Language. A Web standard tool that allows companies to conduct online transactions with their customers and partners easily and inexpensively. XML technology also delivers sound, video, and other data across the Web.

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