User Manual

mySRM for Suppliers

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This document is valid for suppliers of the TGW group

Version History

Chapter	Change	Date	Edited by
all	First release, integrate all previous documents into one	December 2020	DRA
5.1	Insert definitions for order states	February 2021	DRA
Part B	Update: change with SAP	December 2021	DRA
Part A	Revision of the registration process	February 2024	HNC
all	Formatting adjustments & add image captions		

Table of Content

Introduction

mySRM is TGW's Supplier platform. This handbook describes the major functions of mySRM for suppliers. The following supplier processes are carried out through mySRM:

- Supplier management (Registration, Approval, Company Master Data, Supplier Documents, Supplier Ratings)
- Inquiry process (RFQ) both for project inquires and serial parts inquiries (from TGW Mechanics ERP System)
- Offers (Supplier)
- Orders and order documents (TGW Mechanics)
- Order confirmations (Supplier)
- Order changes (TGW Mechanics)
- Order cancellations (TGW Mechanics)
- Order completion (TGW Mechanics)
- Blanket orders (TGW Mechanics)
- Blanket order confirmations (Supplier)
- Action Points

The following advantages shall be generated for the supplier:

- You can inform us at any time and in a structured manner about news in your company. We have a better overview of your entire supply range. This way we will – for example - be able to consider you as supplier for further material groups.
- You will receive RFQ's and supplier ratings directly within mySRM. This will also reduce your workload since you will receive the data in a structured manner from our side. The system allows to transfer data of bigger memory size.
- You will receive real-time ratings including the perceived strengths and potentials from TGW in a transparent way.
- All our international offices and plants will be integrated in mySRM: This way you shall have a potential entry to new markets.
- Our SRM Tool is the perfect platform to interact between you and TGW and to strengthen our cooperation.

Document Structure

This document is structured in two parts

Part A: Registration and Administrative Activities
Part B: Operational Activities

Note:

The screenshots used in the document represent examples from the test system. Since the platform is continuously being expanded and improved, there may be deviations in screenshots in places.

In case of questions or concerns, please contact your responsible Buyer or send an e-mail to mySRM@tgw-group.com

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Part A. Administrative Activities

Registration and management of supplier profile, dashboard, and contact persons

Part A deals with supplier registration and supplier administration as well as the management of contacts and users by the supplier.

1. Supplier Registration

The supplier registration process at TGW mySRM enables all our existing suppliers to update their supplier data and offer a more concise and better structured portfolio to TGW. For new suppliers it gives the possibility to get in contact with TGW Purchasing.

Please note that we only process RFQs for mechanical/electrical installations and system components within the SRM-Tool exclusively.
In order to participate in TGW Group tenders, complete supplier information is required in mySRM. Your company can only be considered for tenders once the registration has been completed.

1.1 Process description

Process for **existing** and **potential** TGW suppliers:

Registration → Receive username/ password → Login + complete supplier profile → Acceptance by TGW

If you are already set up as a supplier in TGW's ERP system, you should normally have received an invitation to register on mySRM. In the event that you approach TGW and wish to become part of the supply chain, you must proactively register yourself.

	Description	Remarks
1	**Registration** Complete all mandatory fields and confirm.	
2	**Receive username/password:** You will receive an e-mail with your username and password sent by the system.	
3	**Login + complete supplier profile:** Open the link in this e-mail and log in with the forwarded username and password. Please change your password. Then fill in your data advisedly. Mandatory fields are marked with an asterisk [*]. You will find a detailed description including screenshots below.	
4	**Acceptance by TGW:** **a) Existing suppliers:** The responsible buyer of TGW receives your completed data and, provided no further queries are necessary, approves your profile. From now on, strategic purchasing issues will be handled via within the SRM suite.	

Description	Remarks
b) Potential suppliers: The TGW buyer responsible for your main material group receives your completed data. After a successful check, you will either be approved or rejected in the system. You will receive an e-mail with your supplier status.	

Table 1 Supplier Registration Process

> - **Privacy Statement: All data submitted by you will be kept strictly confidential and processed within TGW's global purchasing team for purchasing related purposes only.**

1.2 Browser Settings

All functions of mySRM are ensured with the browsers Google Chrome, Internet Explorer, MS Edge, and Mozilla Firefox. However, we recommend using the "Google Chrome" browser as the basic setting.
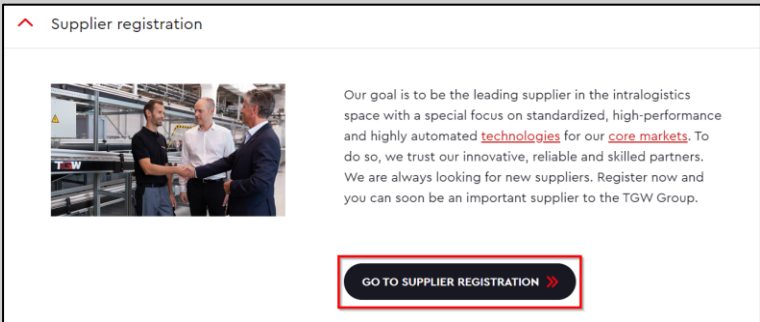
1.3 Start your Registration

	Description	Comment
1	**New Suppliers:** If you would like to become a new Supplier for TGW, please navigate to TGW Website (https://www.tgw-group.com/us/procurement) and click on Supplier Registration. ![Supplier registration] Figure 1: Supplier Registration at TGW's Website (Procurement)	Existing TGW suppliers who do not yet have a mySRM profile will be invited by the responsible purchaser by e-mail to register online. You will be taken directly from the invitation email to the registration page.

Table 2 Registration

1.4 Detailed process: filling in the supplier profile

Note: If you cannot fill out your profile at once, you can save each page temporarily and complete the profile at a later time. The approval workflow is only triggered once all the data has been filled in and you have "published" your profile.

The questions listed here and the definition of the mandatory fields are exemplary. Accordingly, changes, additions, etc. may occur in live operation.
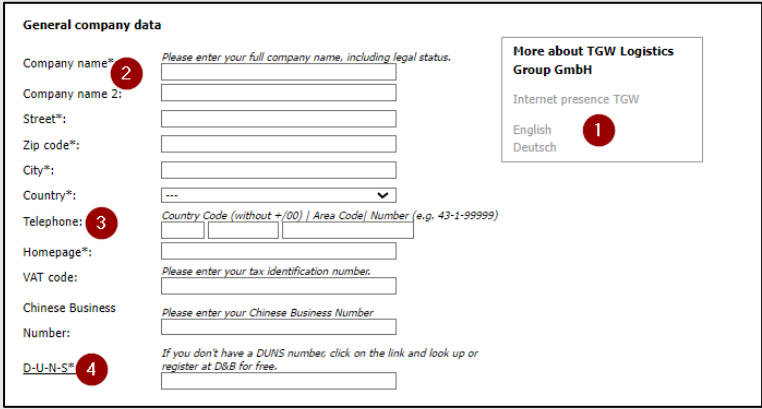
1.4.1 General data

	Description	Remarks
1	Existing suppliers will find some information already filled in the questionnaire. Please check and update the information in case the data is incorrect.	
2	 Figure 2 Registration form for the supplier portal mySRM – part 1	1) Change language ENG/GER 2) Provide your correct company name and address 3) Please note the format as in the example above the box 4) You can find more information about DUNS and how to apply here: https://www.upik.de/en/dunsanfordern.html

Description		Remarks
3	 Figure 3 Registration form for the supplier portal mySRM – part 2	1) Enter the personal data (main contact person) here: 2) The login name is pre-filled, but you can also assign a different login name 3) Please read the general terms of use and confirm them 4) You can check your data again before it is finally submitted to TGW.
4	When you receive the following information, then you have successfully completed the first step. You will then receive an e-mail with your login data from no-reply@app11.jaggaer.com. In case of doubt, please check your SPAM inbox. **Basic data has been entered successfully.** We thank you for your data. You may now log into the Portal and follow the further instructions. Your personal password has been sent to your email address. Figure 4 Confirmation of registration	
5	In the automatically generated email you will find a link: Click on the link and log in with the user data according to the email. When you log in for the first time, you will be asked to change your password.	

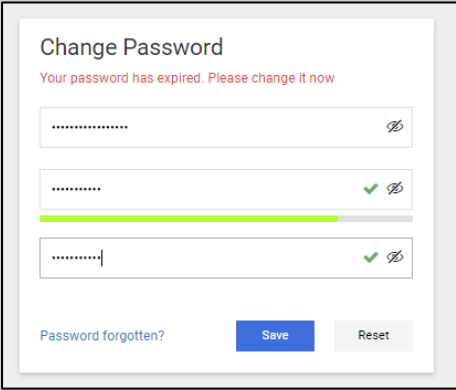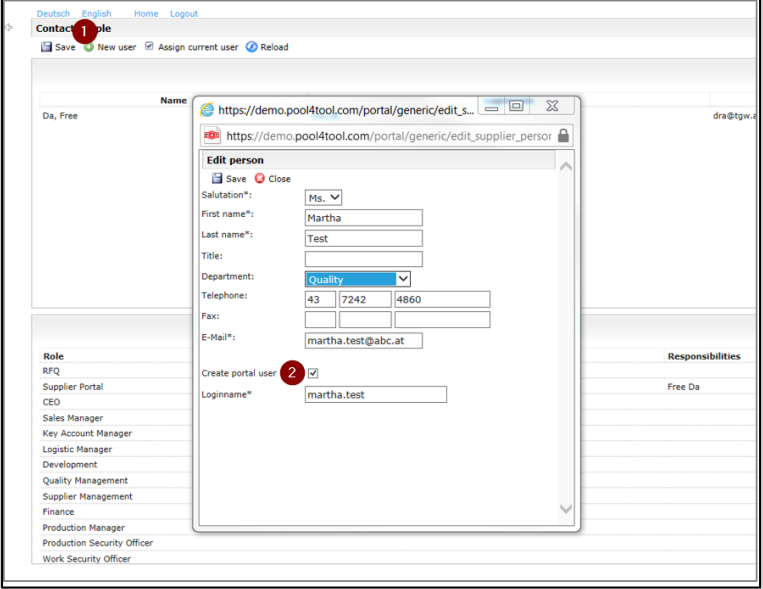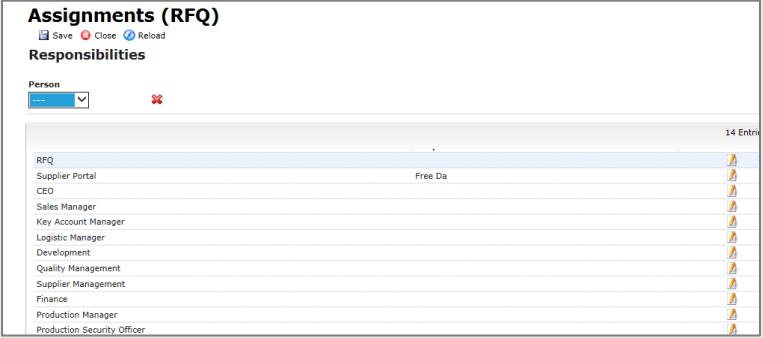| Description	Remarks
The system advises you which criteria you have to meet for the password. Figure 5 Change password	

Table 3 Registration form master data

1.4.2   Fill in detail data

	Description	Remarks
1	As soon as you are logged in, we ask you to fill in your details (fill in company profile)	
2	Please click on "Contacts" and add your company's contact persons and roles as depicted in the screenshot below. IMPORTANT: Please create at least **two contact persons** for your company for which you select the "create portal user" flag (see Screenshot below). If this flag is set, the contact person receives login data and thus can log into the supplier portal. Having only one contact person indicated as portal user for your company might result in problems as soon as this person is not available (due to e.g., holiday, business trip, sick leave, etc.) since in this case nobody of your company can log into our platform to e.g., submit quotes. At TGW, we are not able to create a new portal user for your company in this case. This can only be done by a portal user of your company. If you cannot enter at least two contact persons here, please add a second contact person as portal user for whom you enter a general e-mail address (such as office@yourcompany.com). In this case, everybody in your company who has access to the inbox of this e-mail account can log into the system by resetting the password via the "I forgot my password" function.	

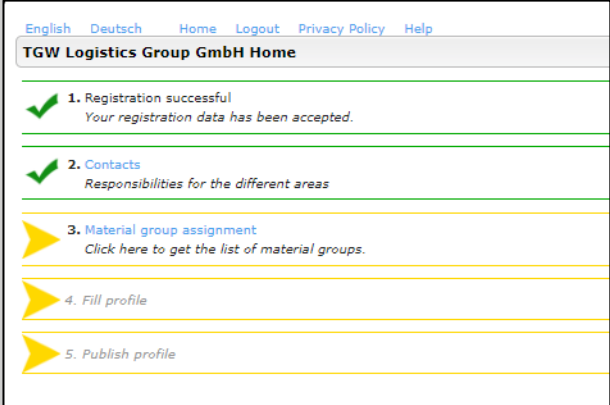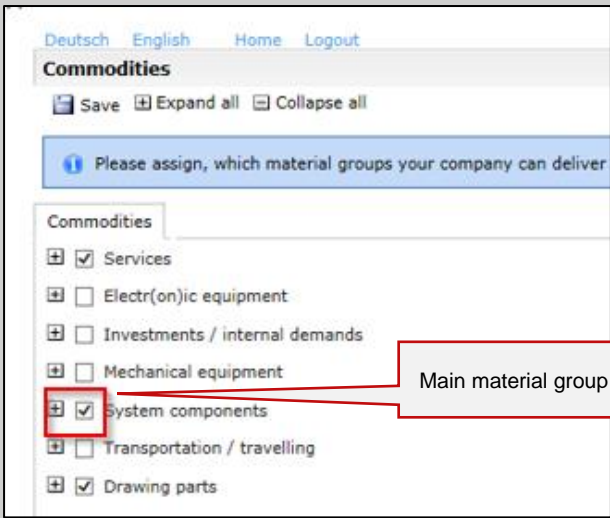|	Description	Remarks
3	**Contact persons** Figure 6 Add/Edit Contact persons/users	1) Add new user 2) By clicking on "Create portal user", the new contact person also gets his/her own login data for using TGW mySRM. 3) Contact persons can be added or changed at any time. You can do this in the navigation area under "Contact person".
4	**Responsibilities:** Here you can define who is responsible for which areas of your company and who should receive the notifications for orders, inquiries, contracts and supplier profile. Figure 7 Roles and responsibilities	To do this, click on the edit symbol on the right under "Menu" in the respective role line. You can then assign the respective person. Multiple assignments are possible.

	Description	Remarks
5	By clicking on "save" you will get to the next step. Figure 8 Next step --> Material group assignment	

Table 4 Edit contact persons

1.4.3 Commodities

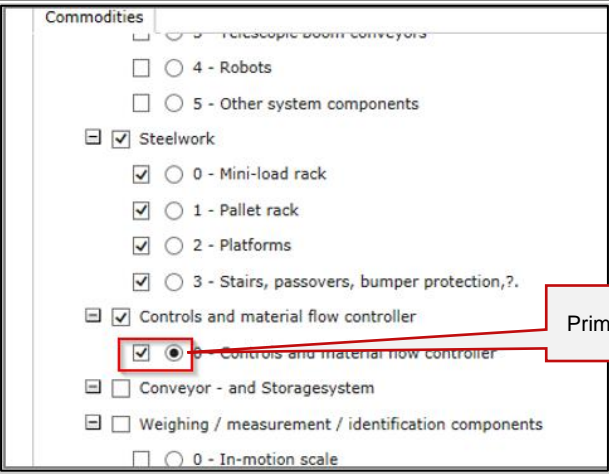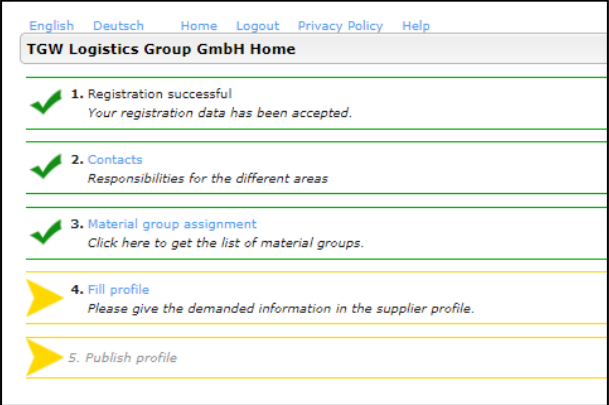|	Description	Remarks
1	Please assign here, which material groups / commodities you would like to supply to TGW (square checkbox) and define which of those is **your primary material group (round** checkbox at third level). Based on your selection, you might be asked material group specific questions and based on your **primary** material group a **contact person from TGW Purchasing will be assigned** to you. Figure 9: Select material group	(1) By ticking the main category you can select all subcategories within this category. However, you need to expand at least one main category to define your primary material group. (2) By clicking on the round check box you define your primary material group (mandatory)! You can only choose **ONE** primary material group, but unlimited secondary material groups.

Description	Remarks
Figure 10 Choose primary material group By clicking on "save" you will get to the next stage	

Table 5 Commodities

1.4.4 Company Profile

	Description	Remarks
1	Next step: **Fill profile** Figure 11 Fill profile	
2	General information In the first section (company details), please briefly describe what you would like to supply for TGW and upload any other documents relating to your company and your products/services. In the second section (bank details), please enter the required bank details.	
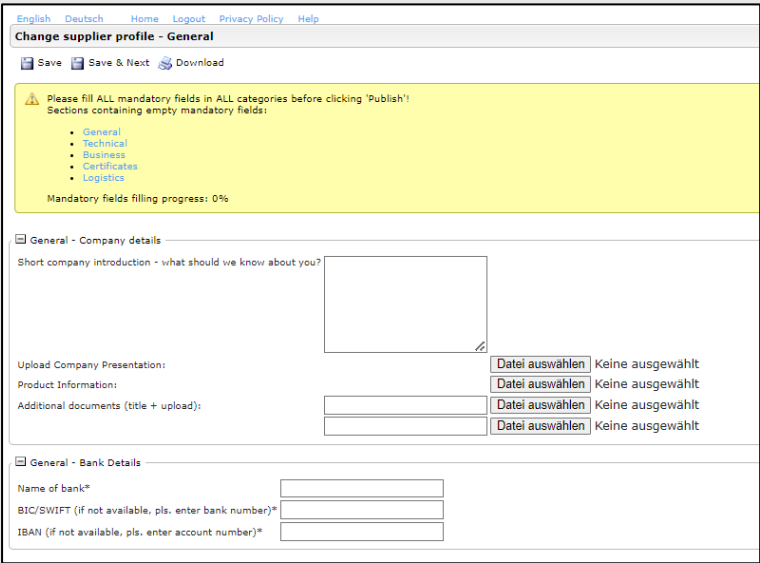
Description	Remarks
Figure 12 Profile - General information	
By clicking on "Save & Next" you will get to the next step.	

Table 6 Company Profile

1.4.5   Business

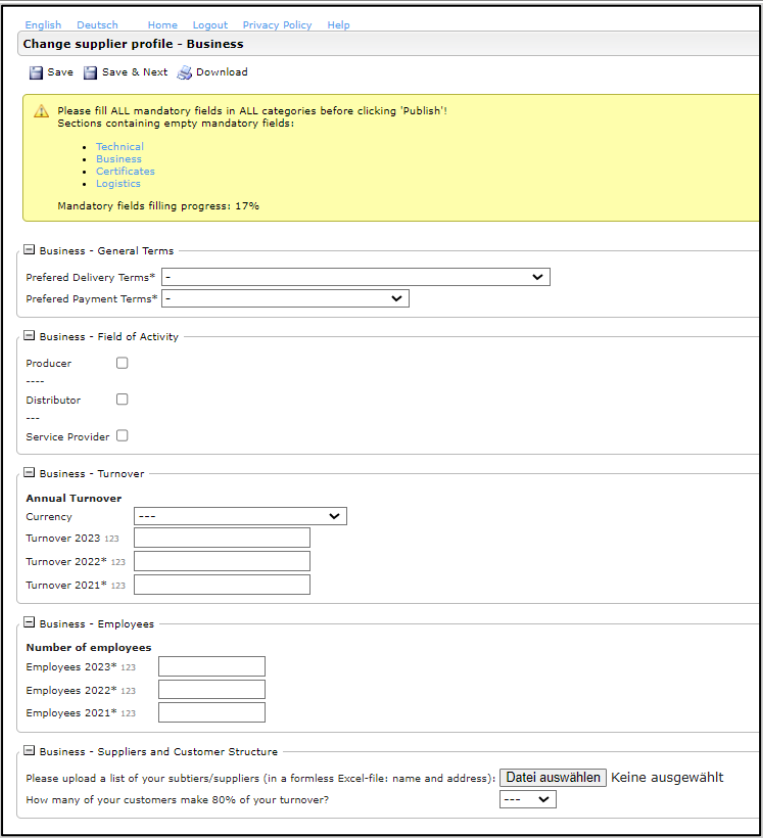|	Description	Remarks
1	In the "Business" section, please let us know the delivery conditions and payment terms that apply to TGW and tell us whether you would like to work for TGW as a manufacturer, distributor, or service provider (multiple entries possible). Please also provide us with your turnover data and number of employees. If you do not yet have any data for the latest year, please simply enter the planned figures. Please also give us an insight into your business environment (sectors, main customers, suppliers, employee structure, ...)	

Description	Remarks
 Figure 13: Business information By clicking on "Save & Next" you will get to the next step.	

2   If you apply for one of the following material groups, you will get more specific questions:
 	
   • Controls and material flow controllers
   • Mechanical or electrical installations
   • Drawing parts
 	
We will not go into detail with these questions. If you have any problems filling in the material group specific questions, please contact your responsible TGW purchaser or mysrm@tgw-group.com.
 	
If you have not selected any of the above material groups, you will be taken directly to the next point.	

Table 7 Business

1.4.6 Technical
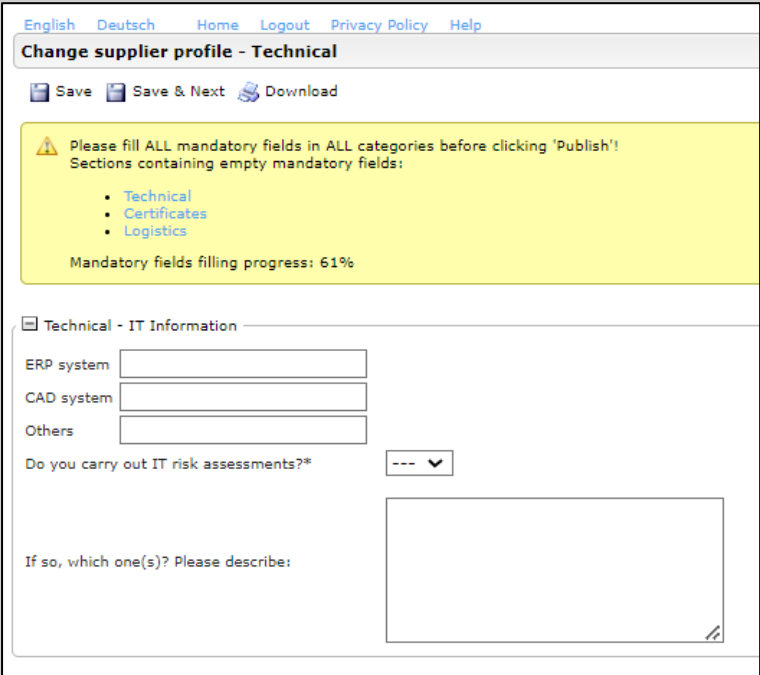
	Description	Remarks
1	In the "Technical" section, please provide us with information about the IT systems you use and let us know whether and which IT risk assessments you carry out.	

Figure 14: Technical info

Table 8 Technical

1.4.7 Certificates

	Description	Remarks
1	Please tell us about your certificates and their validity, including a digital copy of your certificate.	Your details regarding the period of validity of the certificates should ensure that we always have the latest version of your certificates available as a digital copy. You will receive a reminder to update your certificate data on mySRM before the expiry date. As soon as you receive an automated reminder, please log in and upload the latest certificate with a new validity date.
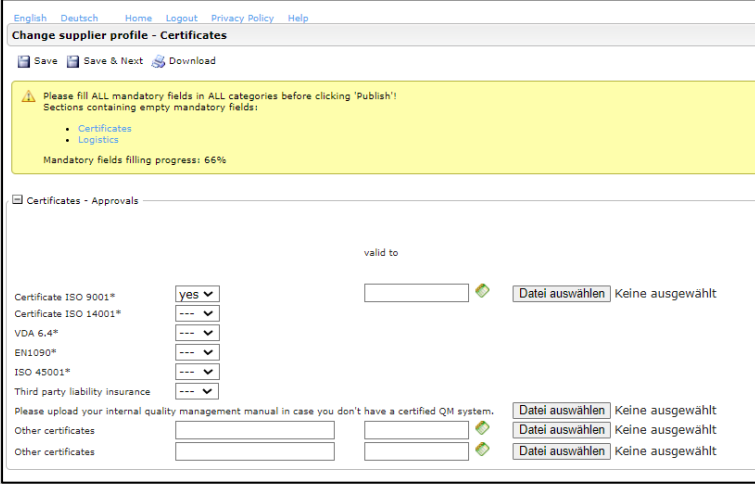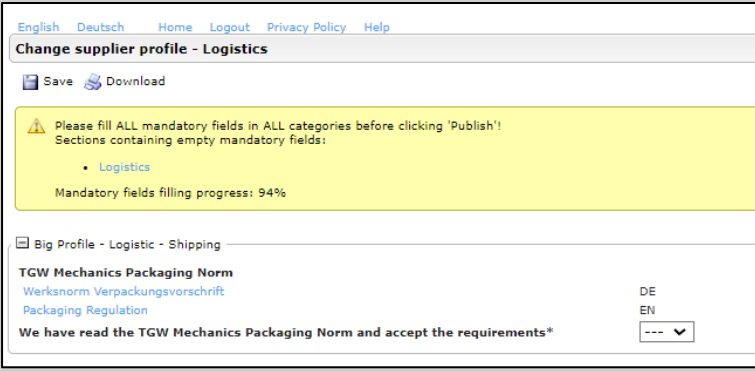
Description	Remarks

Figure 15 Certificates | **Note**: Please note that for quality reasons we cannot place any (further) orders as long as we have not received any new, valid certificates. |

Table 9 Certificates

1.4.8   Logistics

	Description	Remarks
1	In the last step, we ask you to read the TGW Packaging Regulation and confirm your acceptance of these requirements.

Figure 16: Accept Packaging Regulation | |
| 2 | You are at the end of the registration process. Click on "Publish profile" to complete the registration. | |
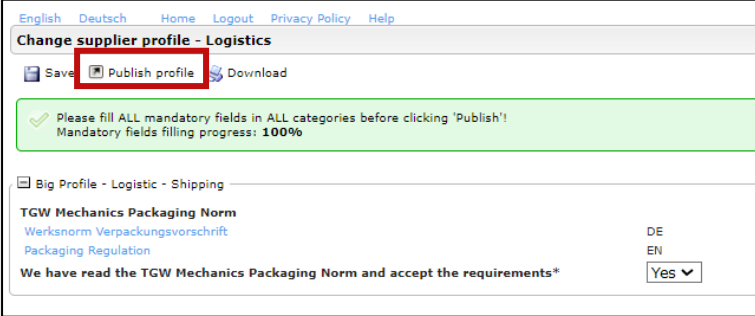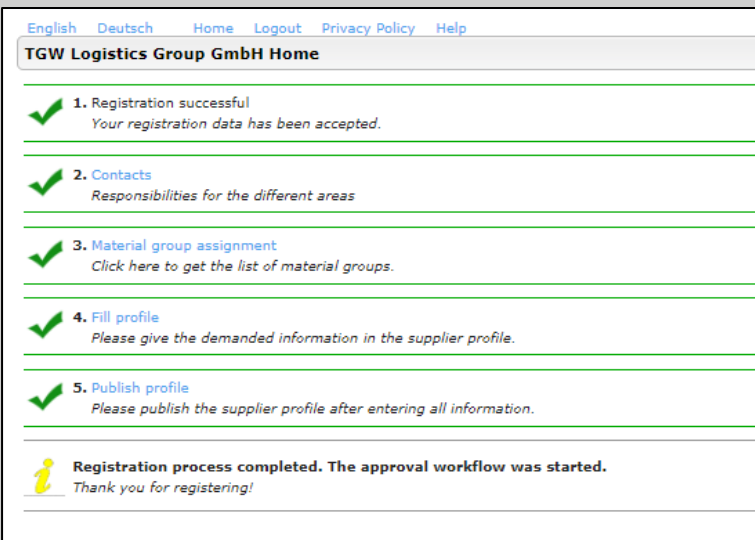
Description	Remarks
Figure 17: Publish profile	

| 3 | The responsible purchaser will now receive information from the system, check your data and decide whether to approve it (see section 1.5 Supplier Release / Question). The registration process ends for you at this point. Figure 18: Registration process completed | **Regular updates** We ask all our suppliers to keep their data up-to-date on mySRM. You will also be asked (usually once a year) to update your data and to process any new questions. This can be done via an automated email to your administrator or directly in mySRM if you log in to process a request, for example. |

Table 10 Logistics

1.4.9 Data check by TGW purchasing department

Once you have published your profile, the purchaser who is assigned to your primary material group will check your data and decide on the following steps:

- If something is unclear, the purchaser might get back to you with questions by e-mail. You will then be invited to clarify the doubts by updating your profile where necessary.
- Once you have clarified the question within your profile, please "publish" it again in order to start the workflow for the purchaser to evaluate.
- If the contents of your profile are complete (and of interest to TGW), your profile will be approved = end of the registration process.

Potential Suppliers:

- If your profile is either already existing (doubles found), not concise, or not interesting to TGW, the purchaser might decline your application. If so, you will be informed by e-mail.

1.5 Supplier Release / Question

As soon as the responsible Purchasing Agent has checked your registration, you will receive an e-mail with further information. You will be able to work with the SRM tool from then on.

Should there be anything unclear, you might receive some questions by e-mail. In this case, please log in, update your profile and "publish" again. Otherwise, your registration cannot be processed any further by TGW and you will receive automatically generated e-mails as long as the registration has not been finished.

2. Login and Portal Dashboard

As soon as the registration process is finished, you will find a so-called "portal dashboard" on the starting page. Various boxes are available where you can find new orders, inquiries, documents or general information from TGW. Details will follow in the respective chapters.
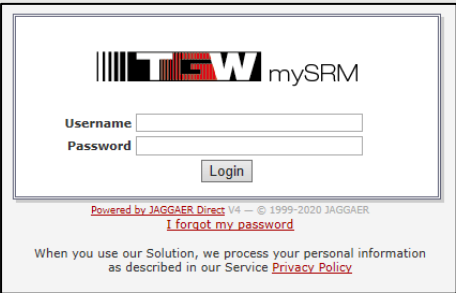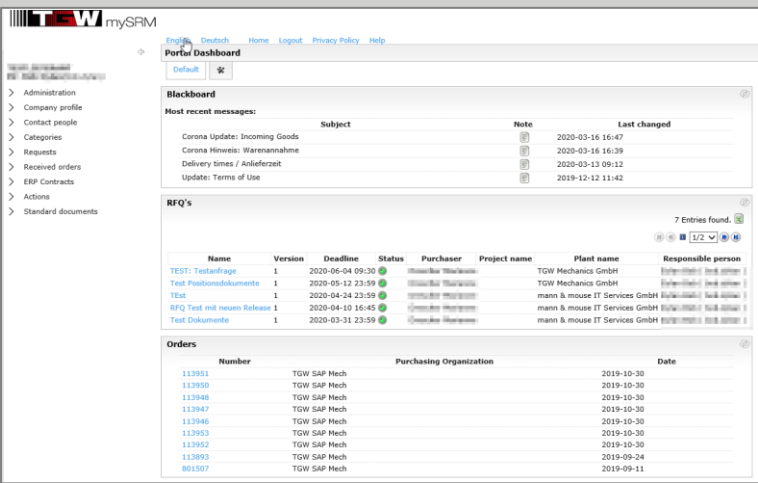
	Description	Remarks
1	To get to the start page, enter the following Internet address in your browser: https://app11.jaggaer.com/portal/tgw.	
2	Log in with your username and password. Figure 19: MySRM Login	
	Overview / Dashboard Figure 20: mySRM Dashboard	

Table 11 Login
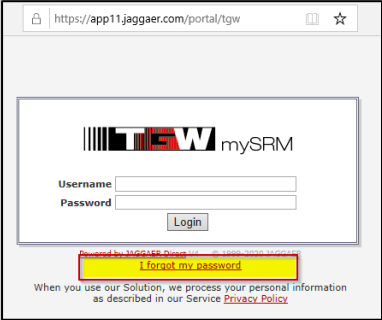
> **Attention: Only a limited number of lines and only the latest documents are displayed. For the complete list, please go to the respective lists in the navigation area. In the left navigation area, you will find your general settings for company profile, product groups, contact persons as well as the menu items inquiries, orders, and contracts.**

In the main window you will find the following boxes:

- Blackboard
  - Current (generally applicable) information is published here
  - This can, for example, be information about planned company holidays / goods receiving times ...).
- MyRFQs
  - Overview of personally received RFQs
- Company RFQs
  - Overview of all requests in the company
- Orders
  - Overview of the latest (unconfirmed) orders from TGW
- Standard documents
  - Overview of generally valid documents in the current version

2.1 Reset password

If you have forgotten your password, you can reset it at any time as described below:

	Description	Remarks
1	Open the link: https://app11.jaggaer.com/portal/tgw and click on „I forgot my password" Figure 21: Reset password 1	
2	You will find a new page, asking for **login name** and **e-mail** address. Fill in your data and click on „Password request". Figure 22: Reset password 2	
3	You will receive an email with an access link to change the password. Click on this link.	**Important:** Please only click on the link once – a double-click does not work here.
4	A browser window opens in which a new password must be defined. Create a new password here taking into account the password rules and then click on "Save".	
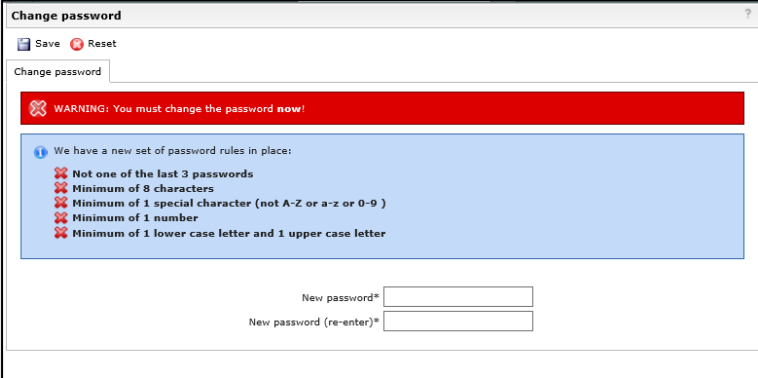
Description	Remarks
Figure 23: Change password	
You will then be forwarded to the supplier portal.	

Table 12 Re-set password

3. Administer your own supplier portal

Below you find a screenshot of which functions can be edited by the supplier's administrator.

3.1 General settings for administrators
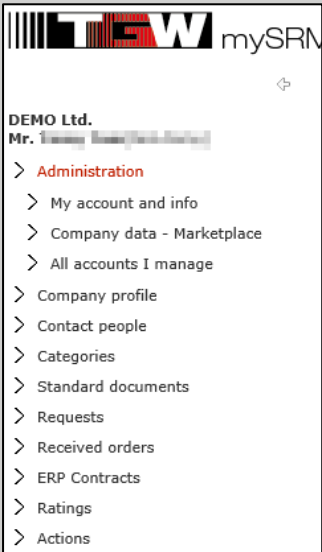
	Description	Remarks
1	The supplier's administrator can at any time change all data in the system that was entered in the context of filling the profile in mySRM. In order to change data, you have to navigate to the corresponding area via the left menu. If, for example, data of the company profile has to be changed, please click on the menu item "Company profile". Figure 24 Navigation bar	

Table 13 General admin settings

3.2 Add Contact People

	Description	Remarks
1	To add a contact person, please navigate to the "Contact people" area via the left-hand menu.	
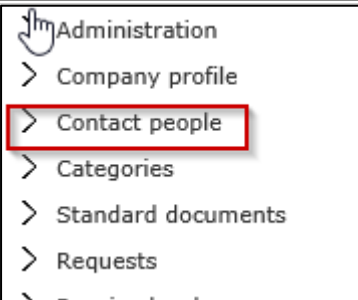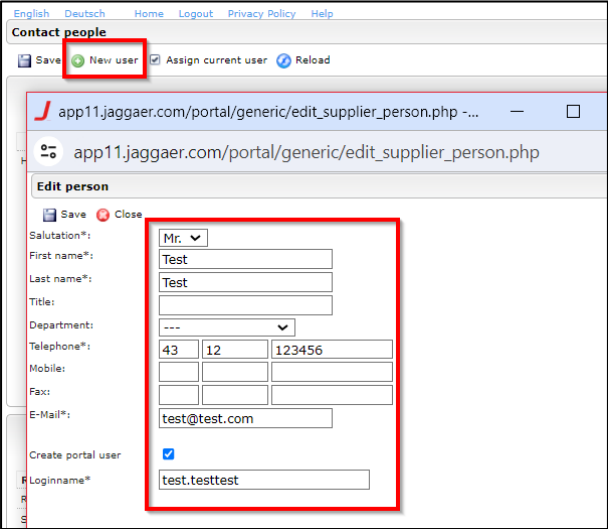
Description	Remarks
 Figure 25 Menu contact people	
2	2) By clicking on "Create portal user", the new contact person also gets his/her own login data for using TGW mySRM. 4) Contact persons can be added or changed at any time. You can do this in the navigation area under "Contact person". Figure 26: Add contact person	

Table 14 Company Profile

3.3 Administer roles and responsibilities

	Description	Remarks
1	The administrator can define in the portal in the "Contact people" area which user is responsible as contact person for the respective	
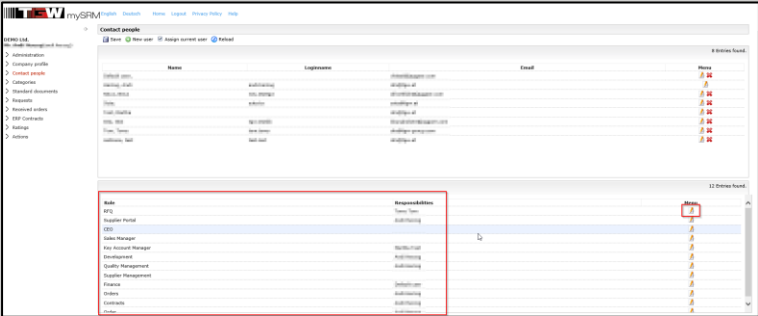
Description	Remarks
modules and consequently receives the notifications (reminders) from the system. Figure 27: Role Assignment Overview Description of the relevant roles for notifications RFQ = User will receive the notifications for new inquiries from the ERP System Supplier Portal = User will receive reminders for the supplier portal and certificates Orders = User will receive the notifications for new orders Contracts = User will receive the notifications for new blanket orders / contracts	
2 In order to assign the user to the role, the "menu button" must be clicked for the relevant role. An area opens above the list of roles in which the person can be assigned to the role. Figure 28: Assign Role	

Table 15 Company Profile

3.4 Add another administrator

In order to add another administrator, the user must first be listed as contact person and portal user (see chapter 3.2). The user must have a username and password in order to be able to log into the system.

Description	Remarks
1 In order to authorize a user to be an administrator, click on "Administration" → "All Accounts I manage → User Data in the menu on the left.	
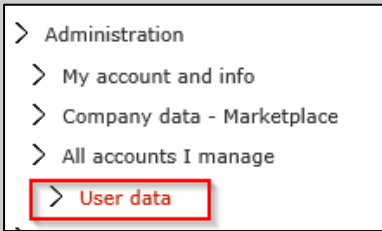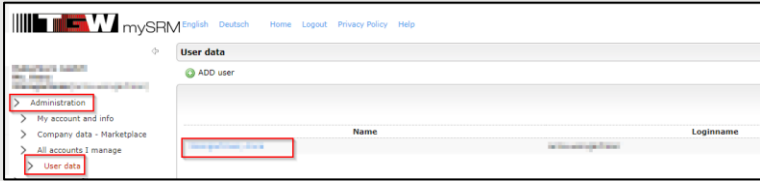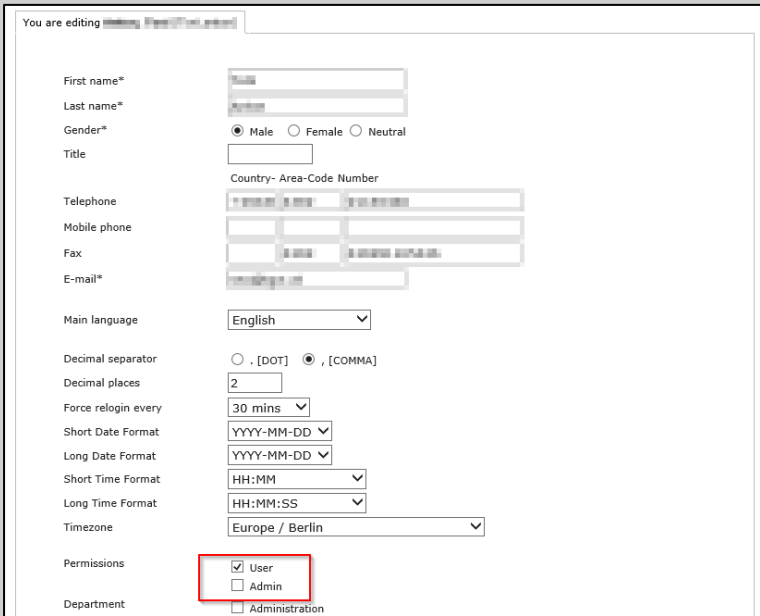
Description		Remarks
	 Figure 29 User data	
2	You will find a list of all contact persons. Please click on the contact person's name to edit the settings: Figure 30 User list	**Important**: Please DO NOT use the icon „Add User" in this area!
3	In the editing area of the user, please **click on the checkbox "Admin"** and then on "Save". Now the user is also created as an administrator and can make the same settings as the existing admin. Figure 31 Set admin rights	

Table 16 Add another admin

- **Important: There must be at least one administrator per supplier. We recommend creating at least 2 administrators.**

3.5 Change of administrative rights

Please note that for data protection reasons changes to the administrator rights for your company account can only be made by the administrator of your company.

If the previous admin is no longer in the company, please follow the steps below:

1. Please fill out the "Change form mySRM Admin" form and send it to mysrm@tgw-group.com The form is available for download on the TGW web page https://www.tgw-group.com/en/procurement.
2. Support will change the e-mail address of the previous administrator to the e-mail address according to the completed form and send the access data.
3. Log in with the access data. You will be asked to set a new password
4. You can either continue with the login data of the previous admin, or create a new admin and delete the old admin. See as described in chapter 3.4.

Part B. Operational Activities

Order management, Inquiries (RFQs), Contracts, Actions and Ratings

Part B of this documentation deals with the basic functions relating to order processing, inquiries, framework agreements, supplier evaluations and action points in mySRM.

The modules for blanket orders (ERP contracts) and order processing (POM) can currently only be carried out by suppliers of TGW Mechanics GmbH (MECH), TGW Systems Integration GmbH (TSI) and TGW Logistics Group GmbH (HOLD).

4. RFQs in mySRM

TGW uses the tendering module across plants for tenders in the area of project management and for inquiries about components as well as for parts and assemblies for the manufacture of TGW Mechanics.

Series parts

Requests (RFQ's - Request for Quotation) for series parts (ID number articles) are started in the ERP system and transferred to mySRM. Inquiries from the ERP System are named with the prefix "ERP Submission #"
For example:
ERP-Submissions#: 1000000001

Project inquiries are shown with a descriptive title (with reference to the respective customer project and the product group). If you are invited to an RFQ, you will receive a message by email with a link to the respective request.
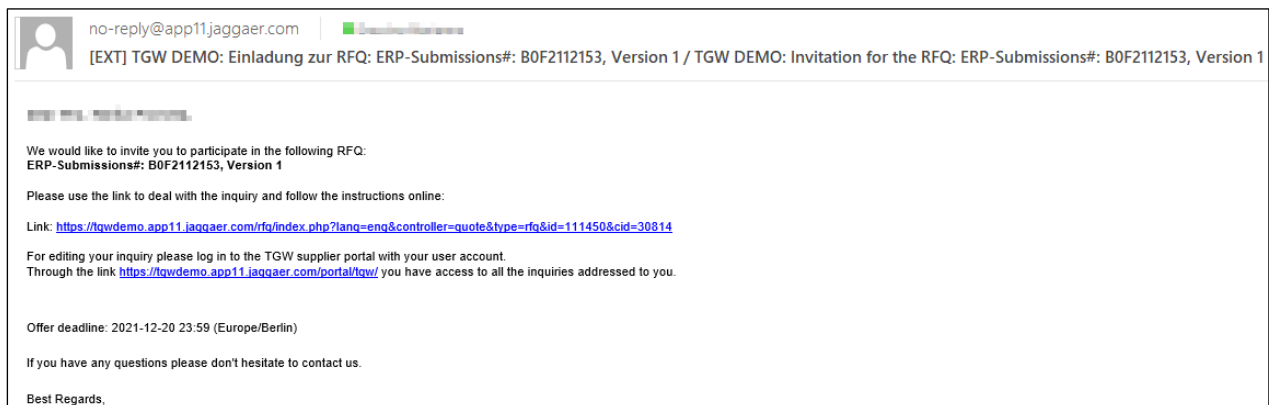
Figure 32 E-Mail Notification for RFQ

As soon as you are logged in, you can navigate to the RFQ overview.

4.1 RFQ overview
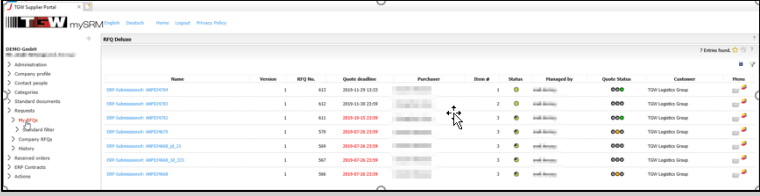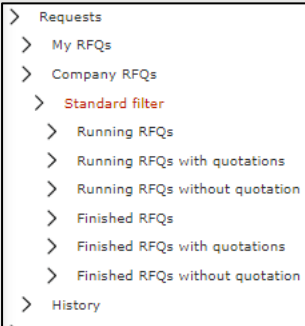
	Description	Remarks
1	The inquiries are filtered by „myRFQs" and „Company RFQs". Figure 33 RFQ Overview	**Attention:** In the section „Company RFQs" you can see all RFQs that were sent to the company, but you can only submit an offer to those that are addressed to yourself. If you wish to forward an RFQ to another person, please refer to chapter 4.7
2	However, other standard filters can also be used, or templates created: Figure 34: Filters in the request overview The "History" filter shows the historical requests (status completed or canceled).	A detailed description of how to create your own filters can be found in chapter 5.6

Table 17 RFQ Overview

4.2 Handle the RFQ

	Description	Remarks
1	If the RFQ is sent from our ERP System (RFQ for part numbers) you usually do not find any head level documents. However, it could be that you find important documents in this section, which you would have to read and/or confirm prior to being able to submit an offer.	If for any reason you are unable or unwilling to submit an offer, you can already decline it at this stage. The Buyer will be informed accordingly.

Description	Remarks
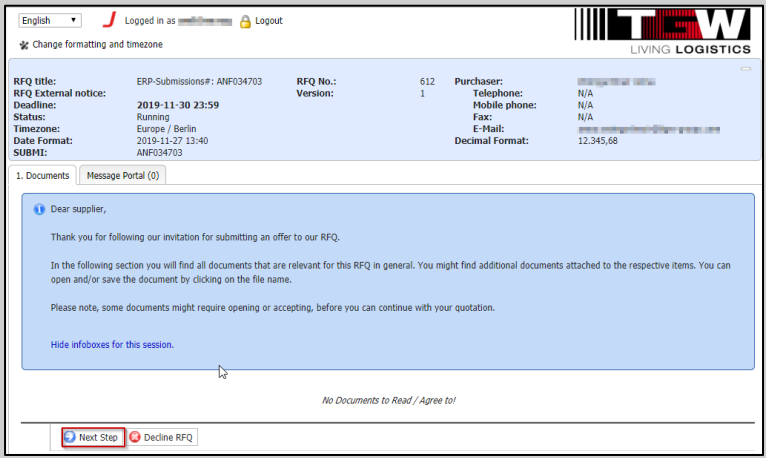
Figure 35 RFQ Front Page

2	As second step you are asked to check your contact data as well as payment and delivery conditions	
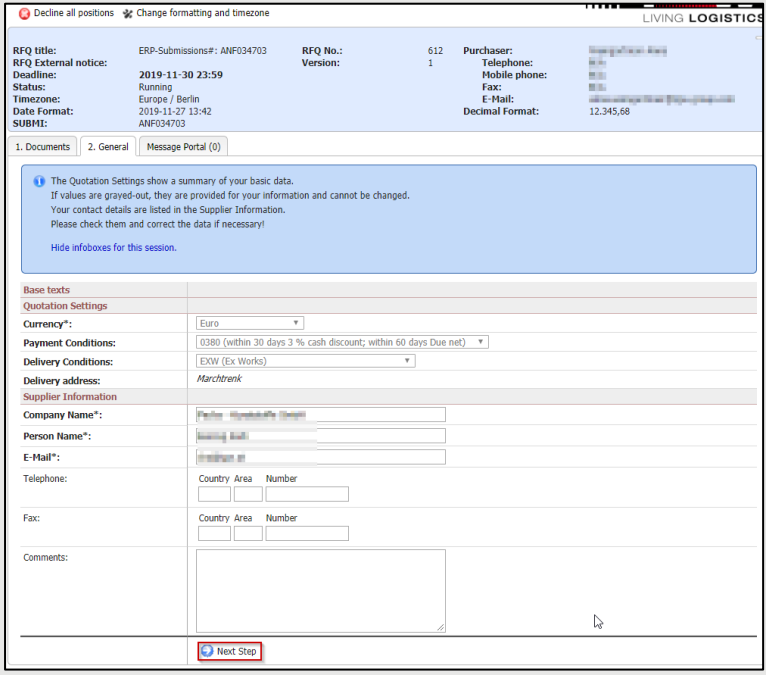
Figure 36: Check contact data and terms

3	As next step you will find the inquiry itself:	

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Dokument ID: | Version 3 | Druckdatum: 2024-02-12 | Die jeweils letztgültige Fassung wird in DOXiS abgelegt, anderorts abgelegte oder ausgedruckte Versionen können veraltet und nicht mehr gültig sein.   34 / 55
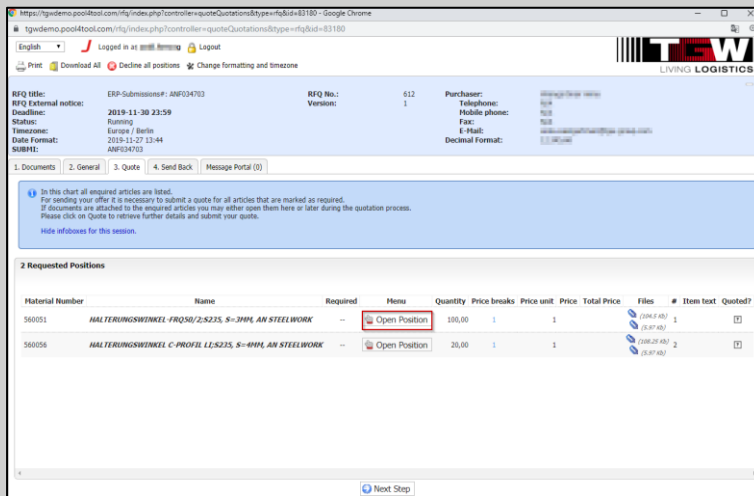
Description		Remarks
	Figure 37: Inquiry Please go to „Open Position"	
4	Please submit your offer in the form (as requested) Figure 38 Offer Please note that Tariff No., Country of origin and Supplier article number are only asked within the course of an RFQ. There is no later possibility for entering this information systematically. Should there be any change with regards to this information in the meantime, please inform your Buyer.	**Attention**: Please indicate the Re-Order Lead Times in **calendar days**. Attachments from your side will not be sent back to our ERP system. Should you have any comments, please enter it into the field „comments".
5	*Hint:* Should you have more comparable articles within one inquiry, you can tick the box „Prefill identical fields on the next position / on all positions". As a consequence, all fields will be pre-filled with the data from the first position – you will only need to check and maybe edit single fields.	

Description	Remarks
Click "Save & Next" to continue. Figure 39 Prefill identical fields	

Table 18 Handle the RFQ

4.3 Digress: quotation with Excel book

	Description	Remarks
1	Different tenders / positions can have an Excel query structure stored. In this case the item detail view looks like this: Figure 40 Excel Quote To do this, load the Excel onto your hard drive and edit it offline. You can then upload the file again and send your offer.	

Table 19 Excel Quotation

4.4 Submit quotation
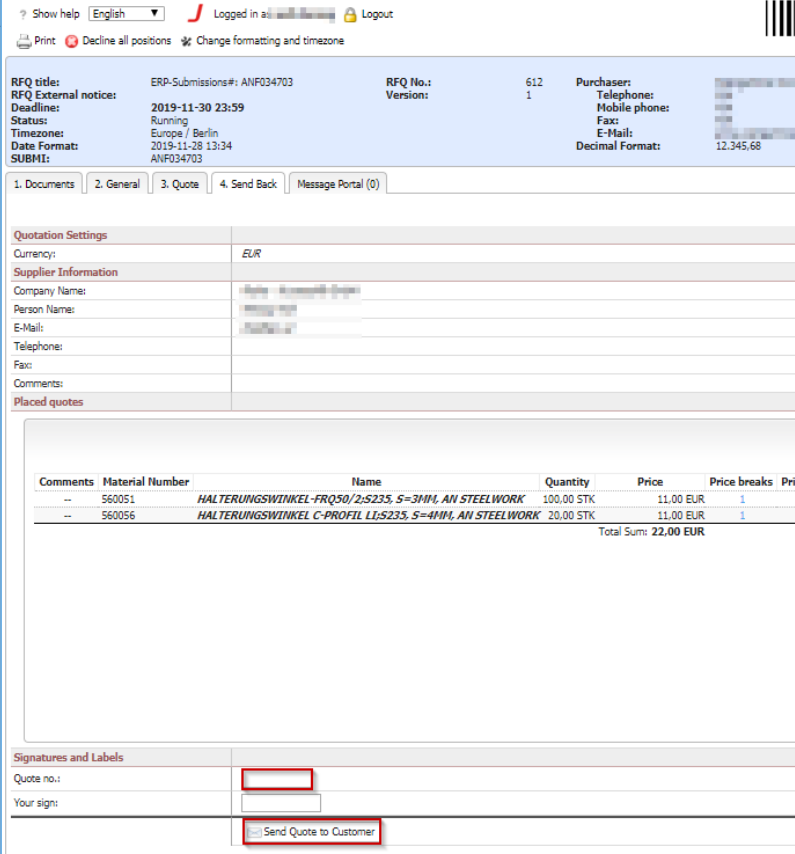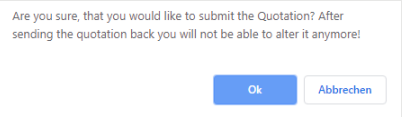
	Description	Remarks
1	Once you have completed your offer for all positions, you will get to the overview, where you can check your offer summary. Please enter your offer reference number and click on „Send offer to the customer". Figure 41 Offer Summary	
2	Another Popup appears – please confirm to finally submit the offer. Figure 42 Pop-Up: Offer submittance The responsible Buyer will be informed of your offer and will get back to you in due course.	

Table 20 Submit quotation

4.5 Decline RFQ

We kindly ask you to decline the inquiry in case you are unable to submit an offer. This way you will not receive further reminders to submit an offer to the respective RFQ.
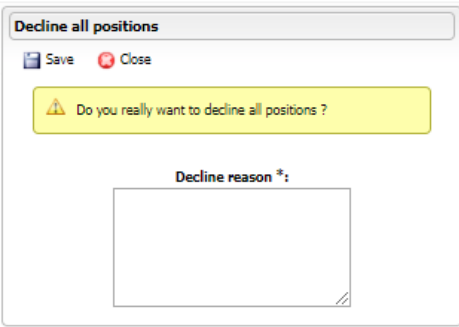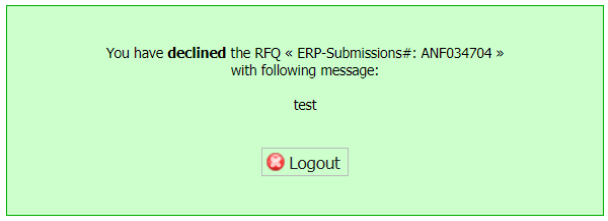
	Description	Remarks
1	You can either decline the entire RFQ (use function „Decline all positions" at the upper left side) or decline single positions (directly in the detail view of the position, right beside the „Save" Button) and give us a reason for your decline. Figure 43 Decline RFQ You will find a confirmation afterwards: Figure 44 Confirmation: RFQ declined	

Table 21 Decline RFQ

4.6 Re-Negotiation of an RFQ

If your Buyer wants to re-negotiate your offer, you will be asked by e-mail to re-submit an offer.

	Description	Remarks
1	Please follow the instructions from the e-mail and re-submit your offer at mySRM.	

Table 22 Re-negotiation of RFQ

4.7 Forward RFQ to another user

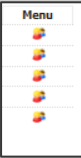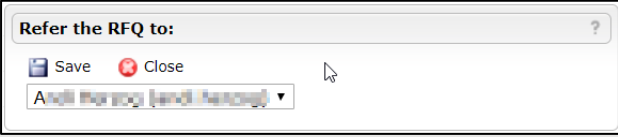|	Description	Remarks
1	Should you wish to forward an RFQ that is addressed to you to another user (i.e.: If you want to take over the request from someone else (representative regulation, request was made to the wrong person in the company ...), you can go to "Company RFQ's" and click on the persons' sign in the menu on the right. Figure 45 Take-over RFQ from one person to another one	
2	This opens a pop-up with a drop-down box where the desired user can be selected. Please press "Save" afterwards. Figure 46 Refer the RFQ to someone else	
3	As soon as the RFQ has been transferred to you, it will appear under "my RFQs". Then the file icon appears and the request name is highlighted in blue, which allows you to open the request. Figure 47: My RFQs	

Table 23 Refer RFQ to someone else

4.8 Completion of inquiries

Please note that you will not receive a message when the inquiry has been closed. The requests are considered complete when the offer period has been reached. After expiry of the offer period, you can no longer submit an offer.

If you are unable to submit your offer within the desired deadline, please contact your purchaser to obtain an extension if necessary.

If you have not yet submitted any feedback on the request via mySRM, you will receive an automated reminder by e-mail shortly before the end of the inquiry (usually 1 day in advance), in which you will be reminded of the offer.

4.9 Message-Portal

In the menu item "Message Portal" you can contact the buyer to ask general questions about the tender. It may also be the case that the buyer distributes information to you or to everyone involved via the message portal.

4.10 Notifications

The following notifications are sent with respect to inquiries (RFQ's) directly from the portal (noreply@app11.jaggaer.com)

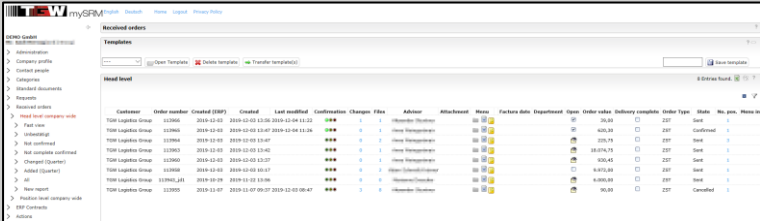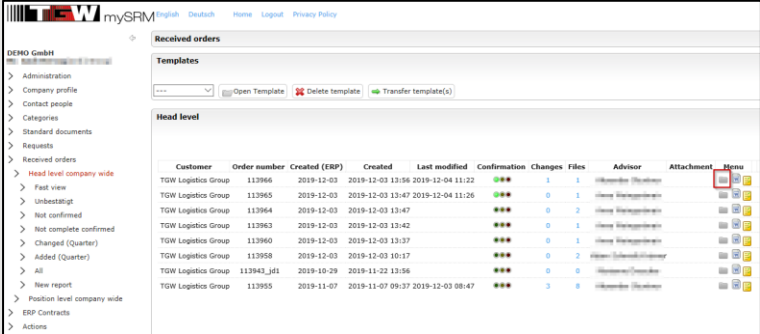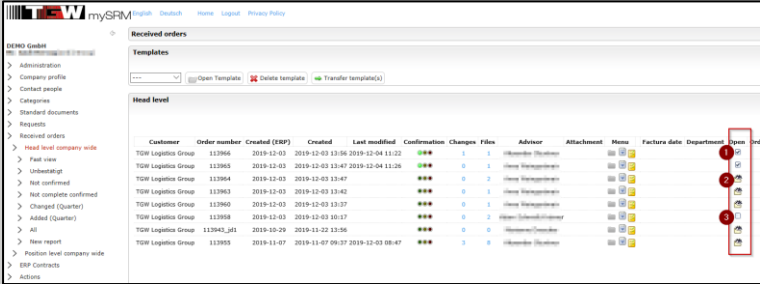| Document Type	Single/Batch	Delay	Recipient*
Inquiries (RFQ)	Single	immediately	Supplier
Messages within RFQs	Single	immediately	Supplier/ Buyer
Quotation reminder	Single	4d after start, 1d prior to deadline	Supplier
Deadline prolongation	Single	Immediately	Supplier
Re-Negotiation / new version	Single	Immediately	Supplier
Notification of new offer	Single	Immediately	Buyer

Table 24 Notifications

The notifications contain at least the respective document number and a link to the portal.

In the respective notification, you will be asked to take the necessary action on mySRM.

5. Orders in mySRM (POM)

As with the requests, you will see a preview of your open orders on your start page. You can open these directly from the overview. However, to get a more detailed overview of all orders and their status, please click on "Received Orders" in the navigation area.
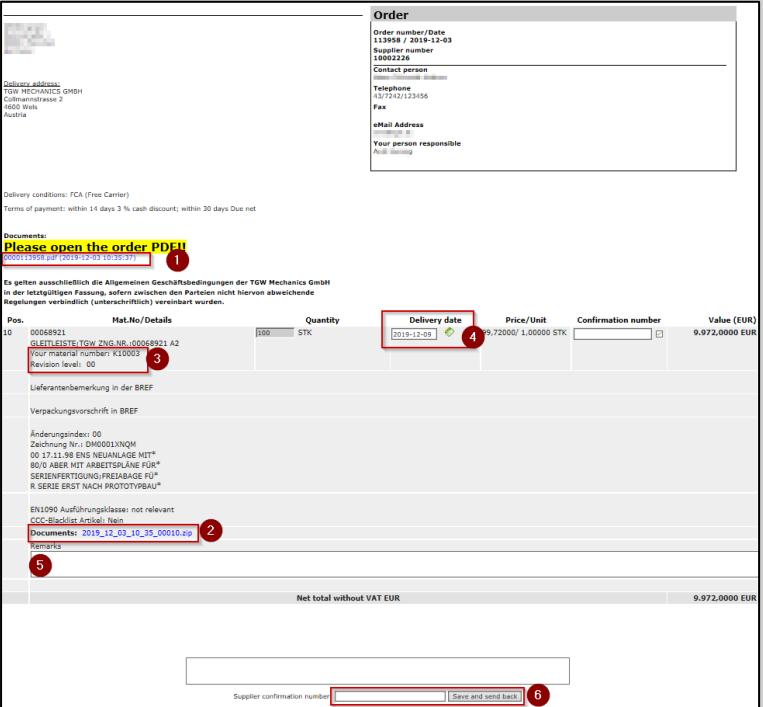
5.1 POM Overview

	Description	Remarks
1	You can view and filter your orders at header and item level: Figure 48 POM Overview In the overview you will find order data as well as all changes, attachments (at header level) and the status of the purchase orders.	ATTENTION: The default filters "Head View / Position View" and "Fast View" refer to the orders of the **last 30 days**. To see all orders (unfiltered), please click on "All".
2	You reach the respective order by clicking on the folder symbol in the "Menu" area: Figure 49 Select one order from the overview	
3	Viewing status of orders Figure 50 Viewing status of orders	1) Confirmed 2) Opened 3) Unread
4	**Order Types**	

Description				Remarks
Currently, we use the following order types:				

Type	Description
ZST/ZSTW	Normal PO
ZTF	Task Force PO
ZEXO	Foreign operation-PO

Figure 51 Order Types

5 Order state

Pt	State	Light	Description
1	Sent	grey	New order – not yet confirmed
2	Confirmed	green	Confirmed without deviation
3	OC deviation	green	Confirmed with deviation
4	Partially confirmed	yellow	Partly confirmed (not all positions)
5	Not confirmed	grey	Changed by TGW after it was confirmed by supplier (irrespective of if it was pt. 2, 3 or 4 before)
6	Sent	grey	Changed by TGW without prior OC
7	Confirmed	green	New OC without deviation
8	OC deviation	green	New OC with deviation
10	~~cancelled~~	grey	Cancelled by TGW
11	Delivered	green	As soon as the delivery is at TGW, order state is shown as delivered, plus a checkmark in column delivery complete

Figure 52 Order state

Remarks: If an order has been confirmed with a deviation, it is possible that the buyer accepts the changes and retransmits this order to the portal for confirmation.

If you confirm again, you can see that there are no more deviations.

Table 25 POM Overview

5.2 Check and confirm order

	Description	Remarks
1	On the order form you will find all relevant information about the order: Figure 53 Order form Particularly noteworthy are: 1) The original order document from the ERP system 2) Documents at item level (e.g., drawing documents ...) 3) Possibly reference to your material number and/or a quantity contract 4) The delivery date, which must be confirmed from your side (or modified if necessary) 5) If you have comments on the order, please enter them below the documents in the "Note" section. Your note will be transferred back to our ERP system. 6) Your confirmation number: The order confirmation is sent to us via "Save and return" and the data is transferred to our ERP system.	
2	To save the documents, you can simply click on the required link, and it will be downloaded automatically. Another way to save the documents would be: A right mouse click on the link and then click on "Save target as".	

	Description	Remarks
	If a window with a security message appears, you can confirm with "Allow".	
3	**Confirm actual delivery quantity / delivery split** Since the process of shipping notification is now no longer to be done by your company, it is particularly important that the delivery quantities are correctly reconfirmed. If, for example, you already know when confirming the order that you cannot deliver the entire quantity on the appointed date, so please let us know by using the following steps: Click on the "Split" button: Figure 54: Quantity split	
4	**Now please divide the total quantity into the split dates** Figure 55: Split delivery dates	Attention: You cannot change the total quantity. For example: if 300 pieces are ordered, you can divide into 2 deliveries of 150 pcs. If the total quantity of the split positions does not fit the total ordered quantity, the confirmation cannot be saved.
5	**Confirmed date and confirmed quantity = binding information** Your confirmed deadlines and quantities must be adhered to.	

Table 26 Check and confirm PO

5.3 Order changes

	Description	Remarks
1	If an order has been changed by TGW, it must be confirmed again from your side. By clicking on the number in the column "Changes", you get an overview of the changes made by you or TGW. Thus, you are always up to date.	You will be notified of any changes by e-mail.
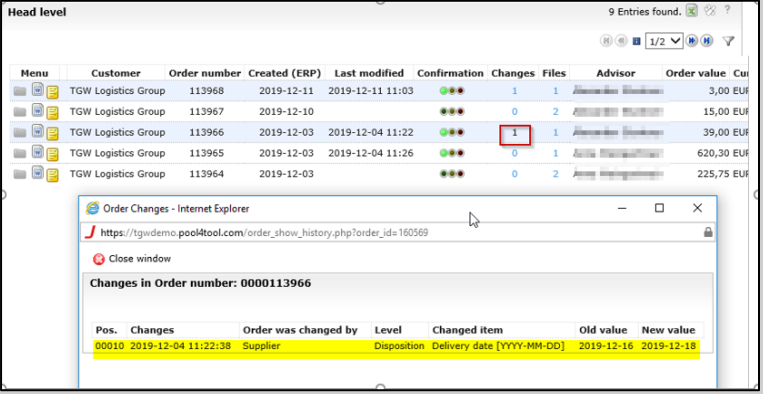
Description	Remarks
Figure 56 Overview of order changes	
2 You will receive a message regarding the changed order and will find it in the navigation area under the category "Changed orders". Please check and confirm this.	
3 For every order change, the **order print document** at the time of the change is updated on head level. Please note: item documents will not automatically be updated with order changes.	

Table 27 Order changes

5.4 Cancellation of PO

Should it be necessary for certain reasons to cancel the order, you will receive an e-mail with the information that the order has been canceled.
Canceled orders are marked as crossed out in the order overview and can no longer be edited.

5.5 Completion of the order
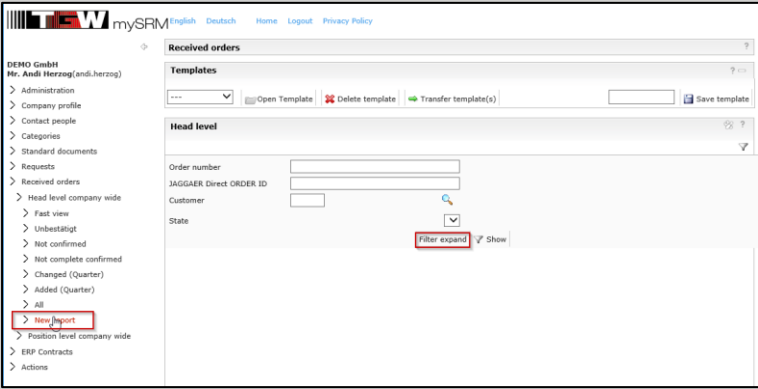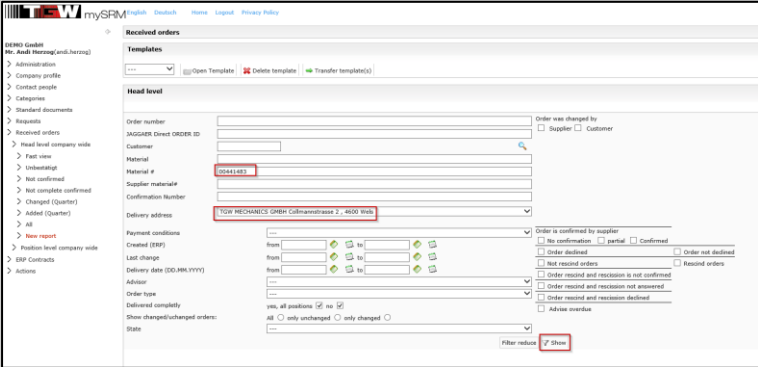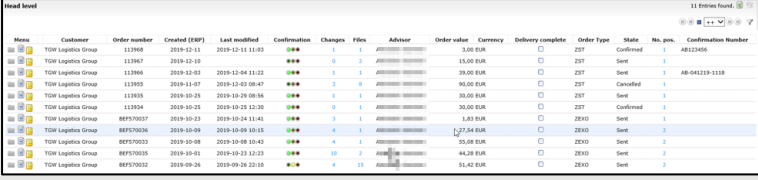
Please note that the process ends for you in the mySRM after the confirmation of the last order version.

Once the order has been delivered in full and checked in to TGW, it will be displayed as "delivered" in the mySRM.

5.6 Create own report / filter

You can use the "New report" function to create any filters.

This function is only visible in the Orders area in the navigation area. However, you can create new filters in any of the categories by setting filters and the "Save Template" function (top right).

	Description	Remarks
1	**Simple filter:** Filter by PO number, customer, status: Figure 57 Simple Filter	
2	**Expanded Filter:** You can use the Expand Filter feature to restrict the level of detail of the search and to filter for any fields.	
3	The following section will filter for a specific material and delivery location: Figure 58 Expanded Filter	
4	You receive the filtered view: Figure 59 Filtered view	
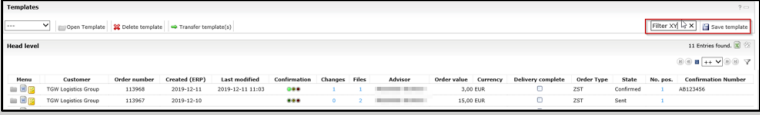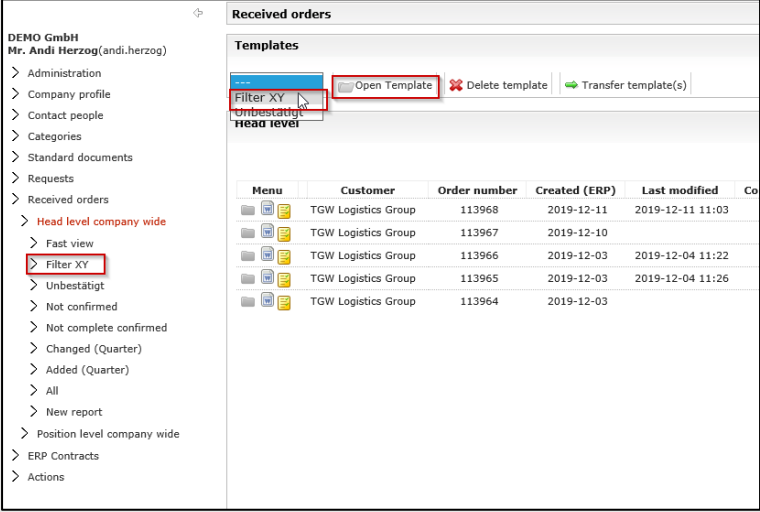
	Description	Remarks
5	To save the filter, you can assign a name to the top right and click on "Save template". Figure 60 Save filter as a template	
6	You can find the saved filters in the navigation area, but you can also display the filter in every order overview: Figure 61 Saved Filter	

Table 28 Create own report/filter

5.7 Notifications

The following notifications are sent with respect to orders (POM) directly from the portal (noreply@app11.jaggaer.com)

Document Type	Single/Batch	Delay	Recipient*
Orders	Batch	1 mail in 2 hours	Supplier
Task Force Orders („express orders")	Single	immediately	Supplier
Confirmation reminder	Batch	Orders > 3d unconfirmed	Supplier
Order changes	Single	immediately	Supplier
Cancellation of PO	Single	Immediately	Supplier

Table 29 Notifications

6. ERP Contracts

Contracts (blanket orders/framework agreements) out of SAP are created with reference numbers 4600000xxx. Migrated contracts from Navision can be found with the reference numbers K1208xxxxx.
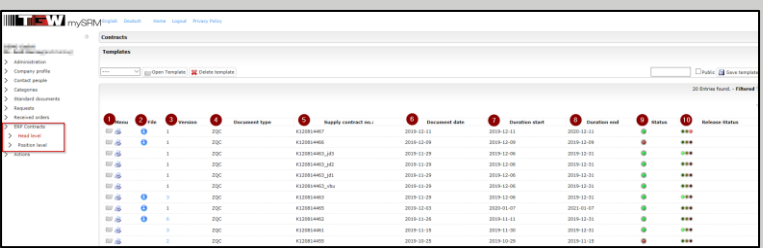
You will receive a notification via e-mail as soon as a new blanket order has been released.

	Description	Remarks
1	Your new blanket orders can be found in the section ERP Contracts. Like with the POM module, you can filter by head level or position level.	

Table 30 Contracts in mySRM

6.1 Contract overview

In the overview you will find all frame orders including their terms and confirmation status:

	Description	Remarks

1	
	
	Figure 62 Overview of blanket orders
	
	Description:
	
	1) Menu: Open or print the contract
	2) File: If you find the blue arrow in this column, you can download files to the contract.
	3) Version: Here you can see the currently valid version of the contract. Every change causes a new version
	4) Document type:
	   - ZQC =new blanket order,
	   - MIC=blanket order migrated from myTGW.
	5) Supply contract no.: K1208xxxxx/46000xxxxx.
	6) Document date = The date when the contract version has been released.
	7) Duration start = The date from which the frame can be accessed
	8) Duration end = Planned end date of the blanket order
		Cancelled contracts are shown as crossed out.

Description	Remarks
9) Status (referring to the duration): green = valid, red = invalid (expired) 10) Release status: indicates if the blanket order has already been accepted by you.	

Table 31 Blanket order overview

6.2 Contract documents

If documents are available for the blanket order, they are transferred to mySRM. This applies in particular to the original receipt from the ERP system as well as to any necessary construction documents (parts lists, drawings).
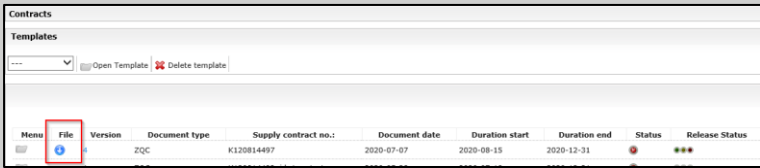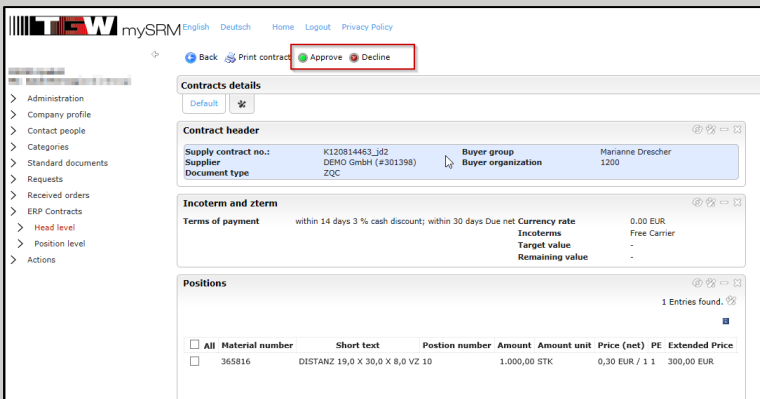
	Description	Remarks
1	The documents can be found in the overview: Figure 63 Blanket order Documents	

Table 32 Contract documents

6.3 Approve contract

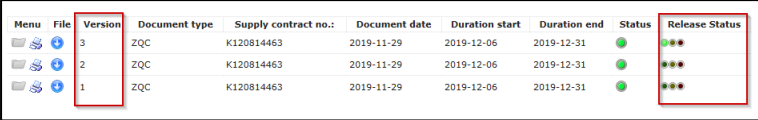|	Description	Remarks
1	You can approve or decline the blanket order. In any case, a pop-up will appear, asking for your confirmation number (if approved) or your reason for decline. Figure 64 Confirm blanket order	

Description		Remarks
	Please note: calls to the blanket order are not reflected on mySRM. You will receive the reference to the blanket order in the respective call (order). If the blanket order is canceled, it will be shown as crossed out and you will receive a message via e-mail. If there are any changes to the contract, you will be contacted as usual by the responsible purchaser. You will receive a notification by e-mail that the blanket order has been changed and will find the information for the respective revision in the ERP contract overview.	
2	The changes (revisions) are to be confirmed again via the portal. By clicking on the version you get to the history of the different versions, and you can open each individual version again using the index card symbol. You can also see here which version you have confirmed and which not. Figure 65 Blanket order versions	

Table 33 Confirm a blanket order

6.4 Notifications
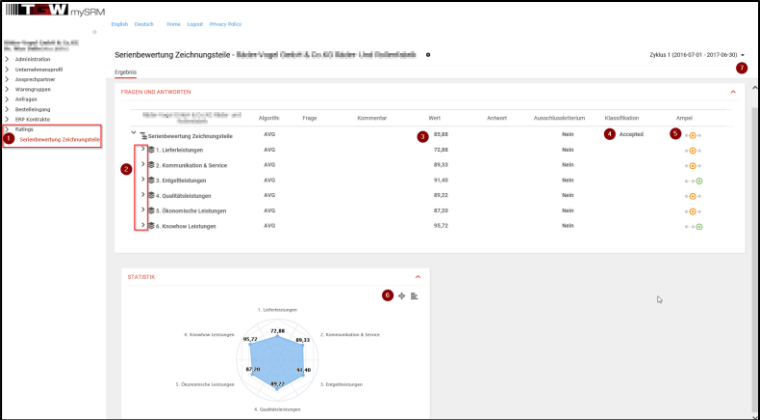
The following notifications are sent with respect to contracts directly from the portal (noreply@app11.jaggaer.com)

Document Type	Single/Batch	Delay	Recipient*
New Contract	Single	immediately	Supplier
Contract confirmation	Single	immediately	Buyer
Contract change	Single	immediately	Supplier
Cancellation of blanket order / contract	Single	immediately	Supplier

Table 34 Notifications

7. Supplier Ratings

If TGW has made a supplier evaluation for your company, the menu item "Ratings" appears in the navigation tree and the respective evaluation below it.

	Description	Remarks
1	TGW uses different supplier evaluation forms. The evaluation sheets can differ depending on the procurement item. - Suppliers for series components are usually assessed once a year on the basis of various criteria and key figures from the past 12 months. - After a project has been completed, project suppliers are assessed on the basis of their performance before and during the project.	
2	The evaluations are given across departments or functions by various TGW employees. The evaluation result is thus an overall evaluation of several evaluators in a certain period of time. If individual questions are answered differently by several evaluators, the point average is taken.	

3	By clicking on the evaluation you get to the detailed result of this supplier evaluation:
	
	Figure 66 Supplier Rating
	
	1) Rating Name
	2) Navigation bar: please click on [>] to find details
	3) Value per category (weighted)
	4) Classification outcome: Preferred – Accepted – Restricted – Desourced
	5) Traffic light:
	  a) 0-79 points: red
	  b) > 79 points: yellow
	  c) > 90 points: green	

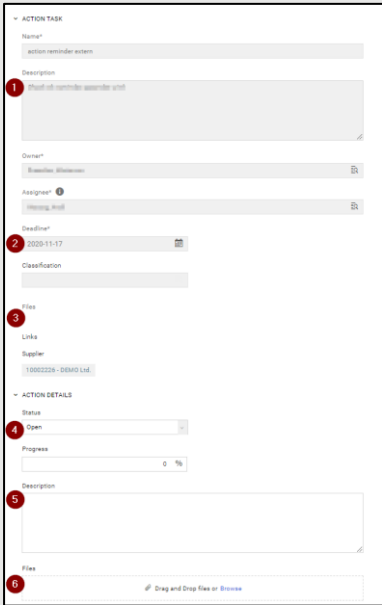|	Description	Remarks
	6) Graphic view - here you can switch between bar and spider diagram 7) Cycle information: With the same evaluation schemes (series evaluation), the various annual evaluations can be selected here.	
4	Detail view Figure 67 Supplier Rating - detail view	
5	If you have any questions about the evaluation results, please contact the responsible buyer	

Table 35 Supplier Rating

8. Action Points

	Description	Remarks
1	For certain applications, you may be asked to complete action points. In this case you will receive an e-mail informing you that new or changed action items can be found in your area on mySRM.	
2	You can find the action points in the navigation area under Actions: Figure 68 Action Points	1) Navigation bar 2) Filter (see # 3 below) 3) Edit the action point
3	You can filter your actions by the following criteria • All • Open • Done • Checking	
4	Edit the action point Figure 69 Action Point - Detail view The most crucial functions are briefly presented below: Actions placed on you: 1. Description of the action 2. Deadline for action completion 3. Attachment (if applicable)	

	Description	Remarks	
	Fields you can edit: 4. Status: You can choose between „open" and „checking". You cannot set status „done", since this can only be done by the requestor. In case you cannot complete the action at once, you can enter the progress % value and save. 5. Description: Your solution to the action 6. Attachments: Here you can add your documents		
5	As soon as the task has been processed, appropriate notifications including the status of the task are sent to the task submitter. After completing the task, please set the status to "checking" so that the client of the action item can check the result and complete the task.		

Table 36 Action Points

9. References

Below are the documents that apply equally to all suppliers and are available for download on the TGW homepage and in the mySRM portal:

Document
Admin Change Form
Handout Lost Password
Handout Add user
General Terms and Conditions

Table 37: References

10. Terms and Abbreviations

Term	Description
JD, Jaggaer Direct, P4T	Provider of mySRM: former Pool4Tool (P4T), now Jaggaer Direct (JD)
mySRM	TGW specific Supplier Relationship Management portal
POM	Purchase Order Management
Contract	Framework order / blanket order
RFQ	Request for quotation / inquiry

Table 38: Terms and Abbreviations