AirSupply

Training guide for users
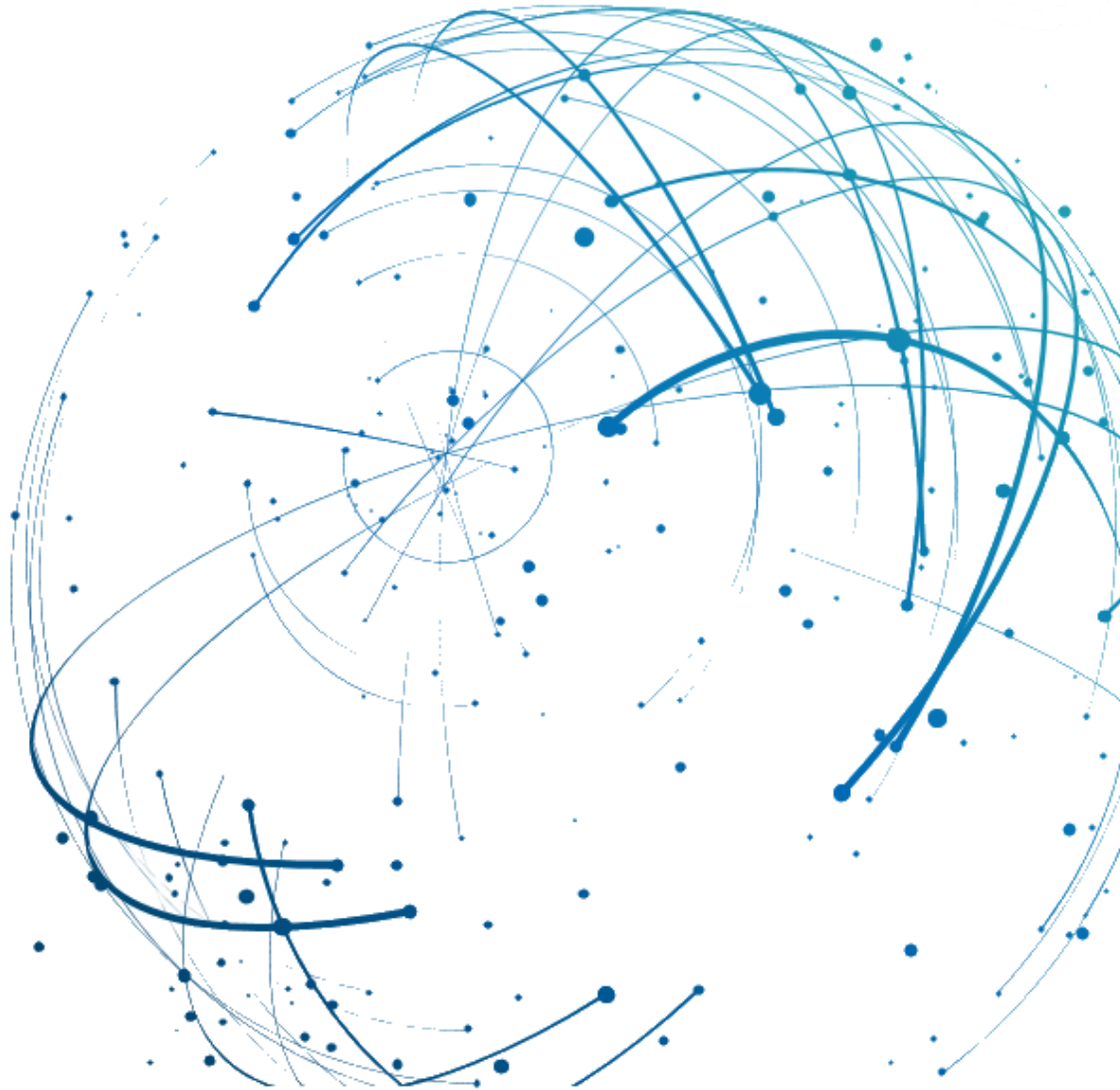
Master Data
June 2022

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CG	Corporate Group
CMN	Customer Material Number
CP	Control Point
CSV	Comma Separated Values
DA	Despatch Advice
DSL	Digital Subscriber Line
DUNS	Data Universal Numbering System
EDI	Electronic Data Interchange
ERP	Enterprise Resource Planning
GUI	Graphical User Interface
IT	Information Technology
LE	Legal Entity
M2M	Machine to Machine
PO	Purchase Order
RD	Referenced Document
SCD	Supply Chain Directory
SMN	Supplier Material Number
SSO	Single Sign-On
VMI	Vendor Managed Inventory
XML	Extensible Markup Language

Preamble

The AirSupply training guide is kept generic and the supplier must comply with his customer scope and specificities. A document "Customer matrix" is available with the needs to be considered by the supplier.

The AirSupply user training guide is composed of 13 modules, one customer matrix and one exercise book. This module is dedicated to Master Data.
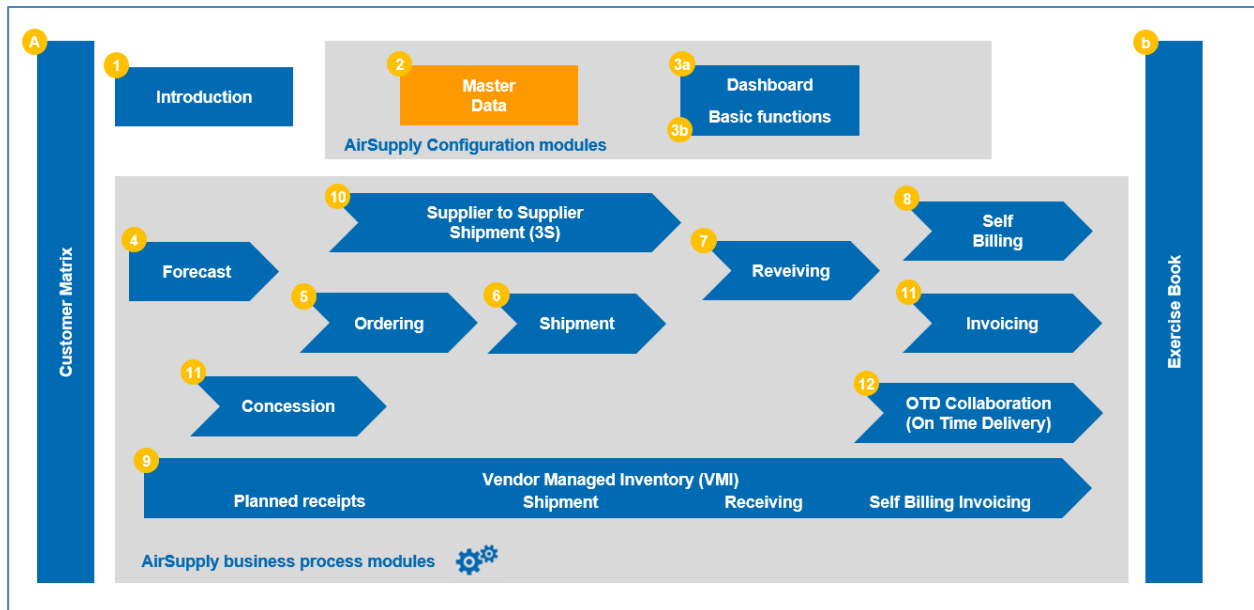

Figure 1: Modules Overview

Objectives of the *Master Data* module

The objectives of the *Master Data* training guide module are to:
- Understand what Master Data are.
- Understand your organization's settings, and your user environment.
- Understand the mechanisms used by AirSupply to manage access to the information, depending on the user's role.
- Understand the principles of the exchanges between AirSupply and ERPs.
- For customer, know how to configure the Material Master Data.
- For supplier users, learn how Supplier planner code concepts can help you.

This module is designed to help you understand the purpose of Master Data. If you want to be able to edit data, but you do not have the required permission, contact the AirSupply administrator.

At the end of this module, the appendix includes:
- Tables corresponding to 'Master Data' screens in AirSupply with the name and description of each column.
- The list of the referenced documents (using the naming convention [RD, number of the referenced document, Title] for example [RD2, Master Data]).

1 General concept

Master Data manages the business data information supporting the Supply Chain processes in AirSupply.

This current module describes how the following data are managed:
- Organization, for suppliers and customers,
- Users, roles and access rights,
- Material.

AirSupply also allows relationship management between the data (for example a network link establishes a connection between two customer and supplier organizations).

Note: For more information about user management, please refer to the help page for SupplyOn user management.

Master Data are mainly composed of:
- Organization structures for customer and supplier (e.g. plant/site)
- Material data for customer and supplier (for example CMN, SMN, cross-references)
- User roles (base for customer and supplier access rights)
- User settings (for example identity data, phone number, language preference)
- Data related to the collaboration between Customer a Supplier, as for example:
    - 'Network link' between Customer and Supplier Organization,
    - 'Supplier Planner Code' which links a supplier user to one or several materials.

Some master data (for example user identity data, roles) can be defined directly in SupplyOn or can be imported from other systems. In the first case, you (or a user having administration rights in SupplyOn) will be able to edit them. In the second case, please contact your IT support.

1.1 Organization structure and network link

A company organization is structured in three levels:
- The Corporate Group (CG).
- The Legal Entity (LE).
- The Control point (CP).

Knowledge of this organizational structure is useful to filter the relevant information (for example plant name).

1.1.1 Customer organization structure

A customer company organization is composed of the following items, as presented in the example below:
- Customer Corporate Group, the highest level of the organization.
- Customer Legal Entity, such as a national company.
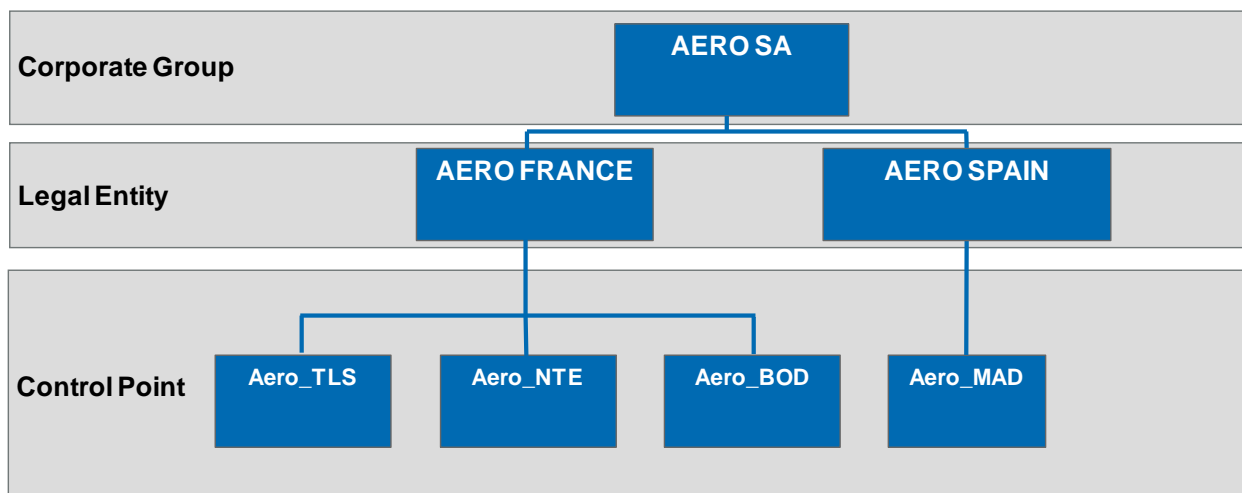- Customer Control Point, such as a plant/site.

Figure 2: Customer organization example

In SupplyOn, the default set up is one CP per LE created. Other CPs can be created by using Administration functions.

1.1.2 Supplier organization structure

A supplier company organization is composed of the following items, as presented in the example below:
- Supplier Corporate Group (the headquarters).
- Supplier Legal Entity (supplier organization).
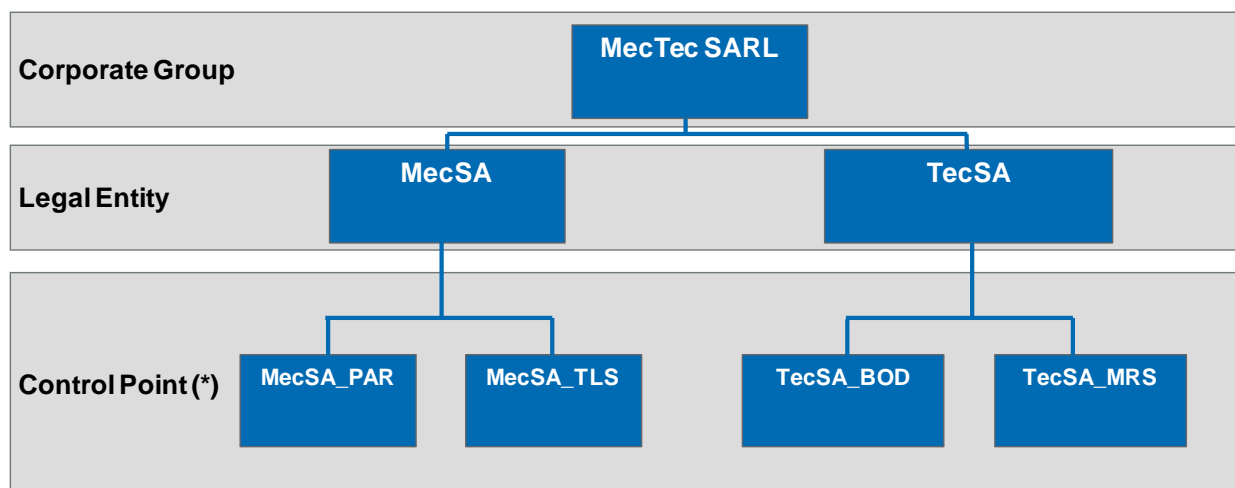- Supplier Control Point (plant/site).

Figure 3: Supplier organization example

Note: The three organizational levels are mandatory. In a small organization, they can be identical, e.g. the legal entity "MecSA" could be linked to a unique control point " MecSA_PAR" (in case of there is no site MecSA_TL).

1.1.3 Network link

A network link is a communication channel where information is exchanged, between a customer site and a supplier site (i.e. in AirSupply customer and supplier control points).
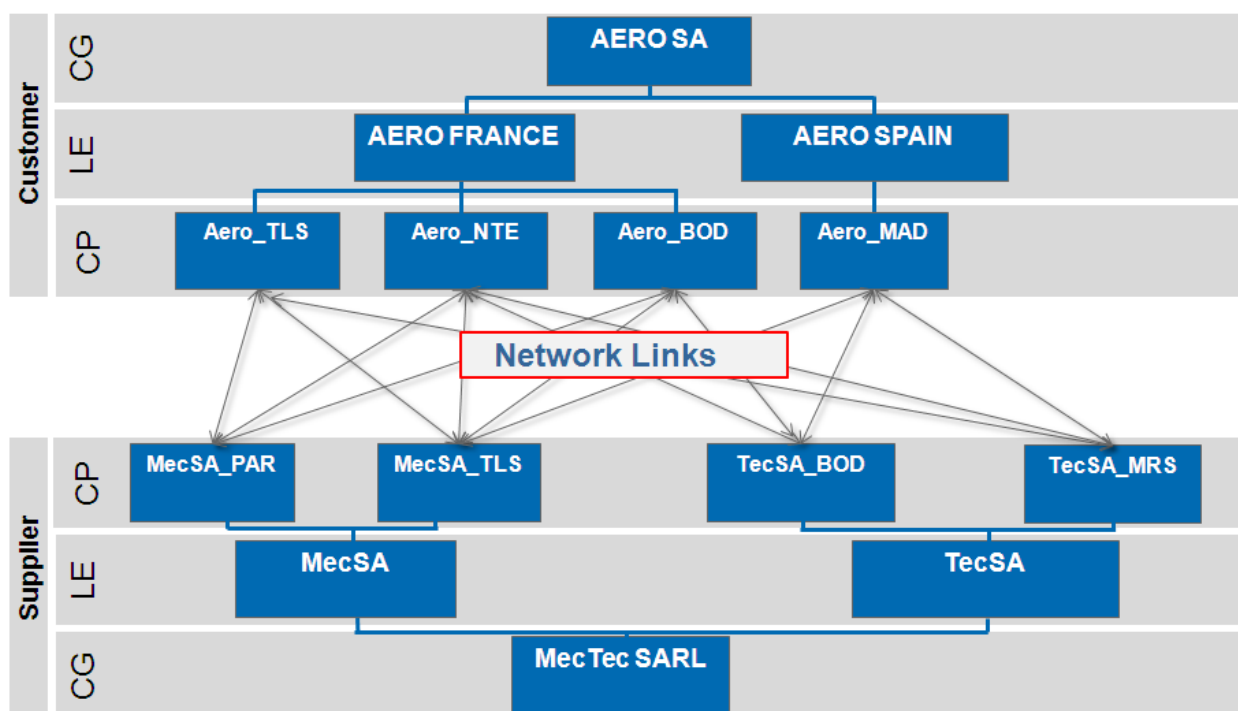

Figure 4: Network link example

A network link can be established only if the corresponding control points are available on both sides (supplier and customer companies).

The administration and configuration of network links is completed by a customer administrator in SupplyOn system by using Supply Chain Directory (SCD).

Supplier can view the network links, but cannot create them.

1.2 Access rights and roles

It is important to understand the mechanism for accessing data for example a Purchase Order, a Forecast) or performing an operation in AirSupply:

- An operation is possible when the permission or access rights (e.g. access right for reading) have been defined,
- The permissions are grouped inside a role (for example an 'AirbSellerShip' supplier user for Airbus is able to create Despatch Advice and can display the Material Master Data),
- Only users assigned to a role have the right to access data or perform an operation.

Each user buyer is directly or indirectly assigned to:

- One or more supplier control points, (for example a plant site 'MecSA_TLS')
- One or more legal entity,
- A corporate group,
- A supplier planner code (not mandatory), linked to different materials.

In this way, a buyer will be able to organize his job, accessing quickly to particular material for the plant site 'MecSA_TLS'.

The assignment of a user to a role and an organization level is performed according to the IT rules and security strategy of the company.
Please contact your AirSupply administrator for more information on this topic.

The table below gives the list of AirSupply roles for Airbus customer.

Role Name	Description
AirbBuyerAccountsPayable	Process Vendor Managed Inventory (VMI), self-billing invoices, Despatch Advice, stock movements including prices and material master data.
AirbBuyerAdminAll	Process all relevant data for the company and change the purchase order status.
AirbBuyerAdminread	Display all relevant data for the company.
AirbBuyerOrderingOfficer	Process purchase orders and forecasts in accordance with the user's Ordering Officer Code.
AirbBuyerPlantMasterdataAdmin	Process site master data.
AirbBuyerInvoicing-Read	Access to electronic invoices

The following table gives the list of customer's roles (except Airbus)

Role Name	Description
IndBuyerPOCollab	Process purchase orders. Display material master data and Despatch Advice.
IndBuyerPOCollabCP	Process purchase orders. Display material master data and Despatch Advice for a site.
IndBuyerFCCollab	Process forecasts. Display material master data.
IndBuyerVMI	Vendor Managed Inventory (VMI) and Despatch Advice processing.
IndBuyerAdmin-VMI	Change VMI goods in transit.
IndBuyerStockmovement	Display stock movements and material master data.
IndBuyerAlerts	Process alerts. Editing of entries in the Alert Monitor.
IndBuyerAdmin-MD	Material master data and site master data processing.
IndBuyerSBI	Displays stock movements, self-billing invoice, material master data, VMI and Despatch Advice.
IndBuyerManager	Display all relevant data for the company.
IndBuyerAdmin-All	Process all relevant data for the company and change the purchase order status.
IndBuyerOrderingOfficer	Forecast collaboration, purchase order collaboration, material master data, plant master data, Despatch Advice, self-billing invoice, VMI and stock movement view, alert collaboration.
IndBuyerConcessionRead	Access to concessions, purchase orders and material master data in read mode only.
IndBuyerAdmin-Concession	Modification of New Concession Request (NCR) statuses by the customer administrator.
IndBuyerInvoicingRead	Access to electronic invoices

The table below gives the list of AirSupply roles for suppliers working with Airbus:

Role Name	Description
AirbSeller3SConsignee	Display of 3S purchase orders and 3S Despatch Advices (Supplier to Supplier Shipment).
AirbSeller3SReceiveClaim	Creating and closing of claims for 3S and confirming goods receipts for 3S (Supplier to Supplier Shipment).
AirbSellerAdminRead	Display all relevant data for the company.
AirbSellerConfigAdmin	Edit settings for Vendor Managed Inventory (VMI) and forecasts.
AirbSellerM2Madmin	Editing of EDI/M2M settings (settings for receiving EDI messages) and EDI messages monitor display.
AirbSellerOrder	Process purchase orders, forecasts and material master data. Display Despatch Advice, stock movements. Display inventory projection and forecast settings.
AirbSellerSales	Displays purchase orders, forecasts, stock movements, Vendor Managed Inventory (VMI), self-billing invoice and material master data. Display inventory projection and forecast settings.
AirbSellerShip	Creation of Despatch Advice and material master data display.
AirbSellerSparesResponsible	Receipt of e-mail notifications for SPARES category purchase orders.
AirbSellerVMI	Vendor Managed Inventory (VMI) and Despatch Advice processing. Displays stock movements, self-billing invoices and display inventory projection and forecast settings.

The following table gives the list of AirSupply roles for suppliers working with customers (except Airbus):

Role Name	Description
IndSellerPOCollab	Process purchase orders and alerts. Display material master data and Despatch Advice.
IndSellerShippingOfficer	Create Despatch Advice. Process alerts.
IndSellerFCCollab	Process forecasts. Display material master data.
IndSellerVMI	Vendor Managed Inventory (VMI) and Despatch Advice processing.
IndSellerAdmin-VMI	Change VMI goods in transit.
IndSellerStockmovements	Display Stocks movements and material master data.
IndSellerAlerts	Process alerts. Editing of entries in the Alert Monitor.
IndSellerAdmin-MD	Material master data processing. Display inventory projection and forecast settings.
IndSellerSBI	Displays stock movements, self-billing invoice and material master data.
IndSellerSales	Display all relevant data for the company.
IndSellerAdmin_all	Process all relevant data for the company and change the purchase order status.
IndSellerM2Madmin	Editing of EDI/M2M settings (settings for receiving EDI messages) and EDI messages monitor display.
IndSellerPO-SparesResponsible	Receipt of e-mail notifications for SPARES category purchase orders.
IndSeller3SClaim	Creating and closing of claims for 3S (Supplier to Supplier Shipment).
IndSeller3SConsignee	Display of 3S purchase orders and 3S Despatch Advices (Supplier to Supplier Shipment).
IndSeller3SGoodsReceipt	Confirming goods receipts for 3S (Supplier to Supplier Shipment).
IndSellerConcessionWrite	Display, create, update concessions. Process New Concession Request (NCR) alerts. Access to purchase orders and material master data in read mode only.
IndSellerConcessionRead	Access to concessions, purchase orders and material master data in read mode only.
IndSellerP2P-Read	Access to electronic invoices
IndSellerP2P-Write	Create electronic invoices based on Purchase Orders

A user can be assigned one or several roles, as required.

There are also roles regarding the company administration and the user management which can be assigned to administrators.

1.3 Material

A material is a basic unit purchased by a customer from a supplier (in terms of date and quantity).
A material is exchanged between a customer site and a supplier site.

In AirSupply, a material is identified by a Customer Material Number (CMN) and a Supplier Material Number (SMN).
In AirSupply, a new material master data is created in case of a new cross reference.
A cross reference links the material code of a customer (CMN) site to the material code of a supplier site (SMN).

A Customer Material Number is defined for each material and is valid for all customer control points.
Supplier Material Numbers (SMN) and cross-references are managed in AirSupply by users who have the 'AirbSellerOrder' and 'IndSellerAdmin-MD' roles.

1.4 Access to AirSupply information

There are two ways to connect to AirSupply. For suppliers the way to access information is defined by the supplier administrator.

1.4.1 Access AirSupply via SupplyOn Portal

In the general configuration, suppliers and customers connect to SupplyOn website in order to access data and to start collaboration.

With a single connection and a unique login and password, suppliers can work with all customers which authorized the collaboration via the SupplyOn platform.

For more information regarding the access to the AirSupply tool, please refer to Chapter 2.

1.4.2 Access AirSupply via the customer Portal

A customer can set up a connection via his own portal without additional authentication, when an SSO (Single Sign-On) has been implemented (for example: Airbus|Supplier portal). This connection offers you a single and clear view on your collaboration with this customer only. Data from other customers are not visible.

1.4.3 Access your global portfolio in AirSupply

As a supplier, if your company can access AirSupply via the two ways explained above by using two different accounts, an optional configuration can be done by your administrator only.

A supplier administrator can merge access information of these two different accounts into a single one.

The 'merge' function allows AirSupply users to have a global view of their portfolio (e.g. Airbus data and all other customers' data) within the same session of SupplyOn portal.
The access via the customer portal is still possible but not anymore mandatory. Your decision on the way to access AirSupply depends on your internal organization.

The benefits of using a single portal access are the following:
- One-time connection with a unique login and password.
- Display all customer data in the Dashboard.
- Flexibility to customize AirSupply screens with specific customer information via the use of active filters. These customized views can be saved in the GUI.

For more information about the customization of the AirSupply view and the setup of active filter, refer to module Dashboard [RD3].

For more information about merging of accounts, refer to Chapter 3.4.

1.5   M2M

M2M stands for machine to machine and means the communication between the ERP system and AirSupply. M2M provides automated data exchange for the included business partners.

The exchanges configuration between AirSupply and customer ERP differ according to the customer company.
- There are several ways that the Supplier can manage the data exchange with the Airsupply tool. The suppliers can download AirSupply data directly in their ERP system to work more efficiently,
- The suppliers have the possibility to upload data into AirSupply,
- They can send messages to AirSupply. The management of messages is done through 'Message Scheduler' and 'Message Monitor' screens.

The connectivity settings per supplier are done on SupplyOn EAI side.

The 'Message Scheduler' screen contains all configuration options for creating a schedule which determines:
- When a message will be sent to an EDI supplier (frequency)
- Which content a message contains (filtering options)

Suppliers have two message format options:
- CSV (temporary)
- BoostAero (XML) v.2.10 (preferred)

2 Access to the tool

2.1 Technical requirements

The minimum required configuration to access AirSupply is:

- PC with Internet access:
    - Minimum frequency of 1 GHz and a central memory of 1 GB,
    - Color monitor with a resolution of 1024x786,
    - Internet connection must support a minimum transfer rate of 128 Kbit per second (better: DSL line or leased line),
    - Every user needs own e-mail address.

- Browser requirements:
  You can use the SupplyOn Browser Test to check out easily whether your Internet browser complies with the requirements. Please visit the following page, § 'Browser requirements'
  http://www.supplyon.com/requirements.html,

- Network requirements:
    - Firewall must allow HTTP and HTTPS,
    - Proxy-Server must offer the possibility of HTTP-GET and HTTP-PUT.

2.2 Access to AirSupply platform

The customer and the supplier share the same access to the AirSupply platform, via the SupplyOn portal.

Firstly, they have to authenticate on SupplyOn portal and then they can access the AirSupply home page, named Dashboard.

In particular cases (for example Airbus), customer and supplier users can directly access the AirSupply home page, without authentication, when an SSO (Single Sign-On) has been implemented (for example Airbus users access AirSupply via the Airbus|People portal, Airbus supplier users access AirSupply via the Airbus|Supply portal).

Connection through the SupplyOn portal

The following screenshot shows the authentication window to AirSupply via www.supplyon.com:

The following screenshot shows the authentication window to AirSupply.

AirSupply home page: The Dashboard

The Dashboard is the first page displayed after accessing AirSupply, as shown on the following screen:
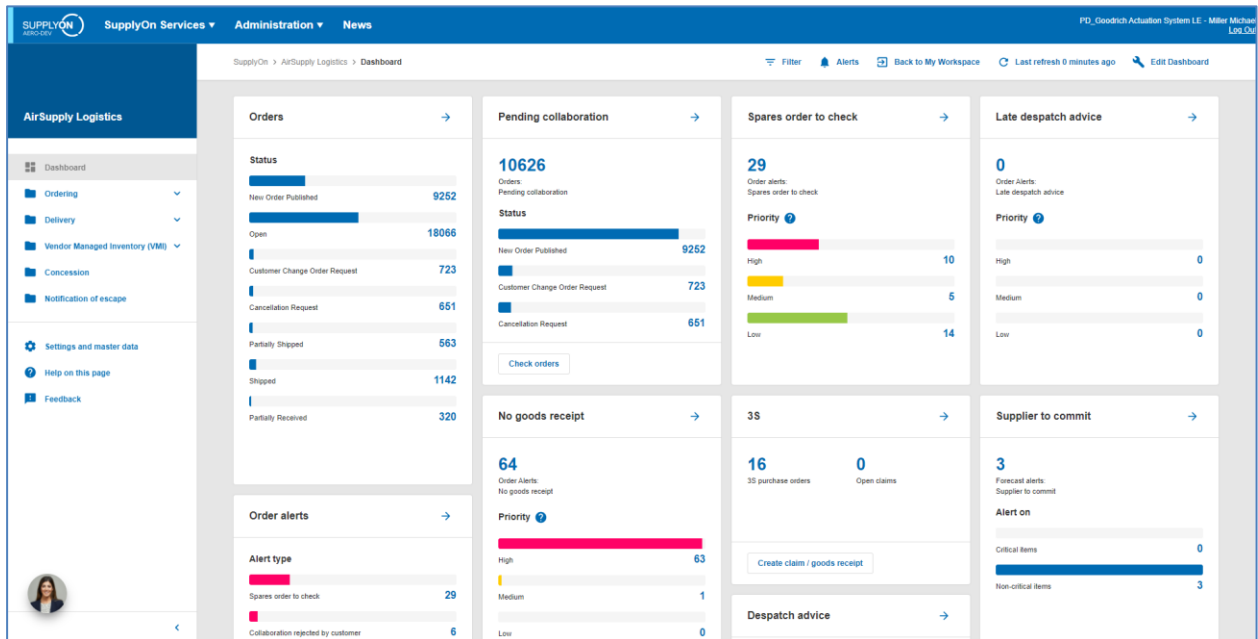
For more information regarding the Dashboard, refer to module Dashboard [RD3].

3 Users data and access right management

The functions described in this chapter relate to a user who accesses via SupplyOn portal. Access and rights management via customer portals are not described.

3.1 My User Account

Clicking the 'My User Account' link, after a mouse over 'Administration' displays the 'My user Account' page.
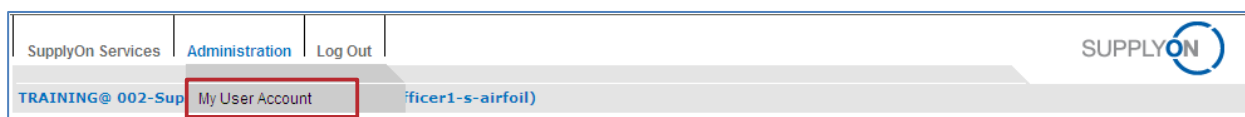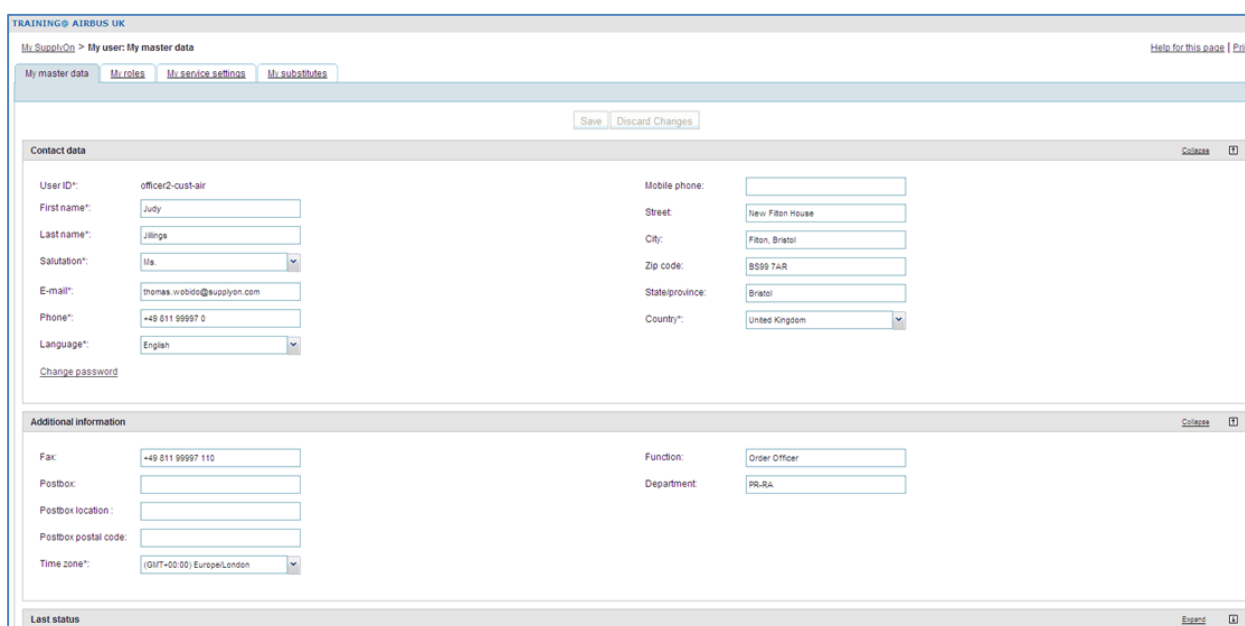
The system displays the following tabs:
- 'My master data',
- 'My roles',
- 'My service settings' (not used by supplier),
- 'My substitutes' (not used by customer/supplier as not applicable to AirSupply users).

3.2 'My master data' tab

'My master data' is the default tab displayed after clicking 'My User Account'.

Please note that depending on the implementation choice of your company, some fields cannot be edited. If you want to modify them, and you do not have the mandatory access rights, please contact your AirSupply administrator.

The 'My master data' screen is composed of the following three sections:
- Contact data,
- Additional information,
- Last status.

The detail of these sections is displayed by clicking the 'Expand' button, as shown below.

3.2.1 Contact data section

In the section ❶ named 'Contact data', you can check and change some personal information:

The fields indicated by an asterisk must be completed.

Please ensure that your e-mail address is correctly entered, as it is the e-mail address used by AirSupply to send you some important messages after you have configured e-mail notifications in AirSupply.

To learn how to configure your e-mail notification, please refer to module 'Dashboard'. [RD3].

Once you have made your changes or entered your data, click the 'Save' button on the top of the screen. A message in the top left corner will confirm that you have updated the master data successfully.

It is also possible to discard the changes, by clicking 'Discard Changes' button.
Please note that you can perform this operation only before saving the data (for example before clicking the 'Save' button).

Change password

If you are authorized, (that is, no SSO), this function allows you to change your password. To do this, click the field change password, define your new password and click 'save' button:

3.2.2   Additional information section

In the section (❷) named 'Additional information', you can add information relating to your location. For example, the time zone can be updated. Several time zones are proposed, the default time zone being Greenwich Mean Time (GMT). For example, if you are located in France, you have to select (GMT +01:00) Europe/Paris time zone.

3.2.3 Last status section

In the section (❸) named 'Last status', the system displays information about the changes of the user status (Activation date):

3.3 'My roles' tab

From 'My master data' default layout, click the 'My roles' tab to display all roles assigned to your user account.

The roles are grouped in three categories:
- AirSupply related roles,
- Company Administration roles,
- User Management roles.
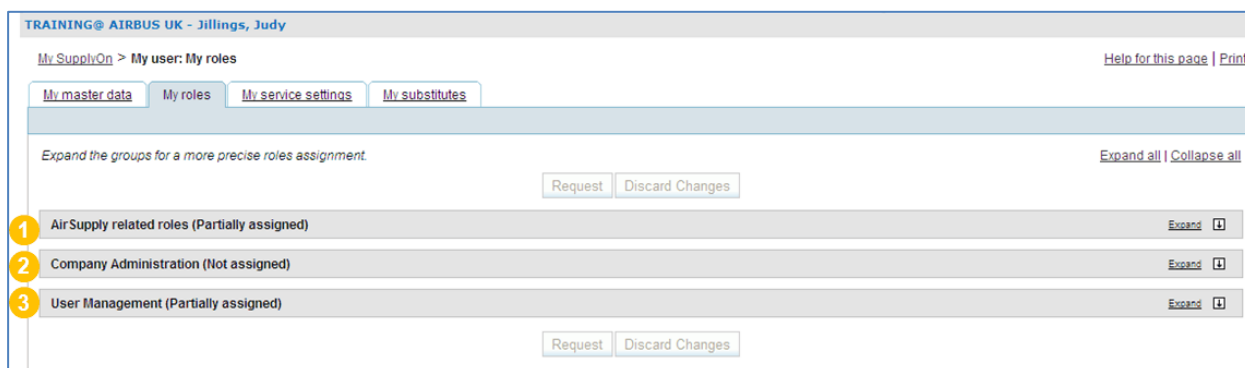
You can display the details of a category by clicking the corresponding 'Expand' button and hide it by clicking the 'Collapse' button.
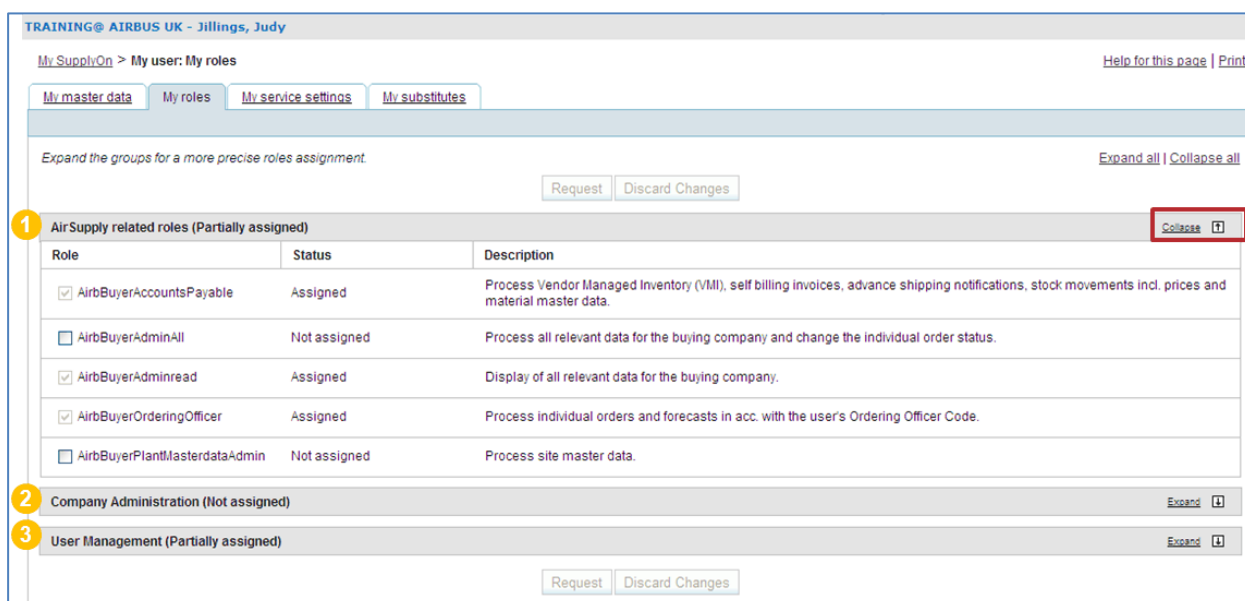
3.3.1 AirSupply related roles

In the section (❶), 'AirSupply related roles' displays information about the business roles.

The roles displayed will be different depending on whether you are a customer or a supplier user.

As the customer, you can see the roles assigned to you. In the example below listing the roles used by Airbus customer, the user is assigned to the three available roles.

AirSupply related roles (Partially assigned)			Collapse
Role	Status	Description	
☑ AirbBuyerAccountsPayable	Assigned	Process Vendor Managed Inventory (VMI), self billing invoices, advance shipping notifications, stock movements incl. prices and material master data.	
☐ AirbBuyerAdminAll	Not assigned	Process all relevant data for the buying company and change the individual order status.	
☑ AirbBuyerAdminread	Assigned	Display of all relevant data for the buying company.	
☑ AirbBuyerOrderingOfficer	Assigned	Process individual orders and forecasts in acc. with the user's Ordering Officer Code.	
☐ AirbBuyerPlantMasterdataAdmin	Not assigned	Process site master data.	

As a supplier, you can see the roles assigned to you. In the example below listing the roles used by the supplier with Airbus customer, the user is assigned to even of the eight available roles.

Note: If one or several roles are not properly assigned, you can request an access by following the procedure described in § 3.4.

3.3.2 Company Administration roles

In the section (❷), 'Company Administration' displays information about the management of access rights of information relating to your company.

The screen below shows the 'Company Administration' section for a supplier or a customer:

Company Administration (Not assigned)			Collapse
Role	Status	Description	
☐ CompanyAdmin	Not assigned	Manage company data. For suppliers, the authorizations of the roles "BusinessDirectorySupplierStandard" and "SLMSupplierAll" are included. For suppliers using the Problem Solver, "ProblemSolverAdmin" is included.	
☐ ControlPointAdmin	Not assigned	Creation and administration of sites in the Supply Chain Directory. Article data administration.	
☐ Corporate Group Master Data Admin	Not assigned	Master data administration for companies within a group.	
☐ NetworklinkAdmin	Not assigned	Creation, maintenance and deletion of suppliers for logistics and finance processes.	

For more details, please contact your administrator.

3.3.3   User Management roles

In the section (❸), 'User Management' displays information about the user administration:

Role	Status	Description
☐ UM Admin	Not assigned	User and role assignment administration (creation, changing, activation and deactivation).
☐ UM Admin Basic	Not assigned	Users administration. The assignment of roles and confirmation of requested roles are not included.
☐ UM Admin Role	Not assigned	Users, changes in user data and role assignment administration. Creation, activation and deactivation of users not included.
☐ UM Admin User	Not assigned	Users administration. Role changing not included.
☐ UM Company Config	Not assigned	Authorization for company-wide user administration basic settings.
☑ UM Default	Assigned	Change own user data.
☐ UM Edit User Profiles Role	Not assigned	UM Edit User Profiles Role
☐ UM Reset Password Role	Not assigned	UM Reset Password Role
☐ UM Team Admin	Not assigned	Create, maintain and delete teams.
☐ UM View User Profiles Role	Not assigned	UM View User Profiles Role

User Management (Partially assigned) — Collapse

Notes: This section is for information only, as it is only for administrator use.
*Management of user roles for merged accounts must be done via the customer portal (check the Customer Matrix to have more details about the rules to be followed with your customers).*

For more information on merged accounts, refer to Chapter [3.4_Merging of accounts to access the global portfolio in AirSupply].

3.3.4   Request an additional role

It is possible to request additional roles. If the roles are not managed in AirSupply, you have to contact your company administrator. If the roles are managed in AirSupply, you request an additional role in the application, as explained below through the list of roles used by a supplier with Airbus customer.

From 'My roles' tab, you can select one or several roles (❶) through the different categories and click the 'Request' button (❷).

The following screen is displayed:

Click the 'Save' button to confirm your request.

Your request will be sent to your SupplyOn company administrator.

3.4 Merging of accounts to access the global portfolio in AirSupply

This chapter concerns only the supplier administrator with the 'UMAdmin' and 'UMAdminRole' roles.

It explains the following functions:

- Function to merge supplier user accounts created on the customer portal with or without existing supplier user accounts created on the SupplyOn portal. There are 3 possible scenarios to handle it. Regardless of the selected scenario, **the supplier administrator has first to start the merge process from a supplier user account created on the customer portal also called 'external' account**:
  - Scenario 1: Merging of accounts via a task panel in the 'User Management' section.
  - Scenario 2: Merging of accounts via a context menu in the 'User Management' section.
  - Scenario 3: Adding a role to a customer user account 'ready for merge'.
- Function to unmerge a merged user account. It is definitely required if bad accounts have been selected by the supplier administrator during the initial 'merge' process (Scenarios 1 and 2).
- Function to delete a merged user account (for example a supplier user quits the company).

Notes: No e-mail notification will be sent to the users selected during the 'merge' process.
Management of user roles for merged accounts must be done via the customer portal (check the Customer Matrix to have more details about the rules to be followed with your customers).
If you use PKI certificate to access SupplyOn portal, the access to Airsupply via the customer portal will not be authorized (PKI security level is higher than login/password level).

3.4.1 Scenario 1: Merging of accounts via a task panel in the 'User Management' section

The supplier administrator can access an 'external' account to merge via a dedicated task panel in the 'User Management' section of the GUI.
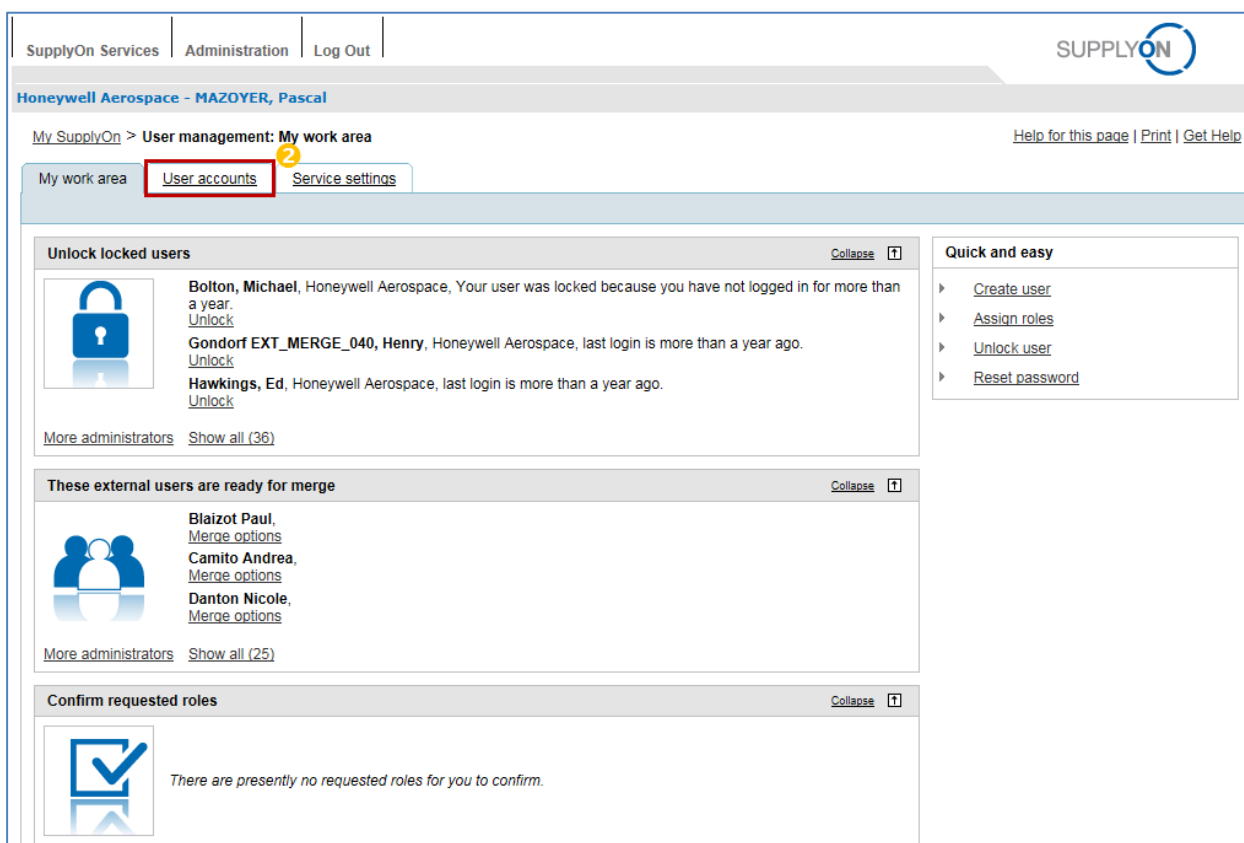
After a mouse over 'Administration', the system displays a navigation menu as follows:
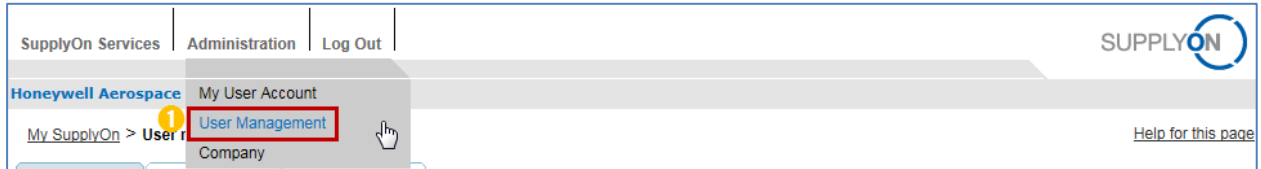
❶ Click 'User Management'.

The system displays by default the tab 'My work area':
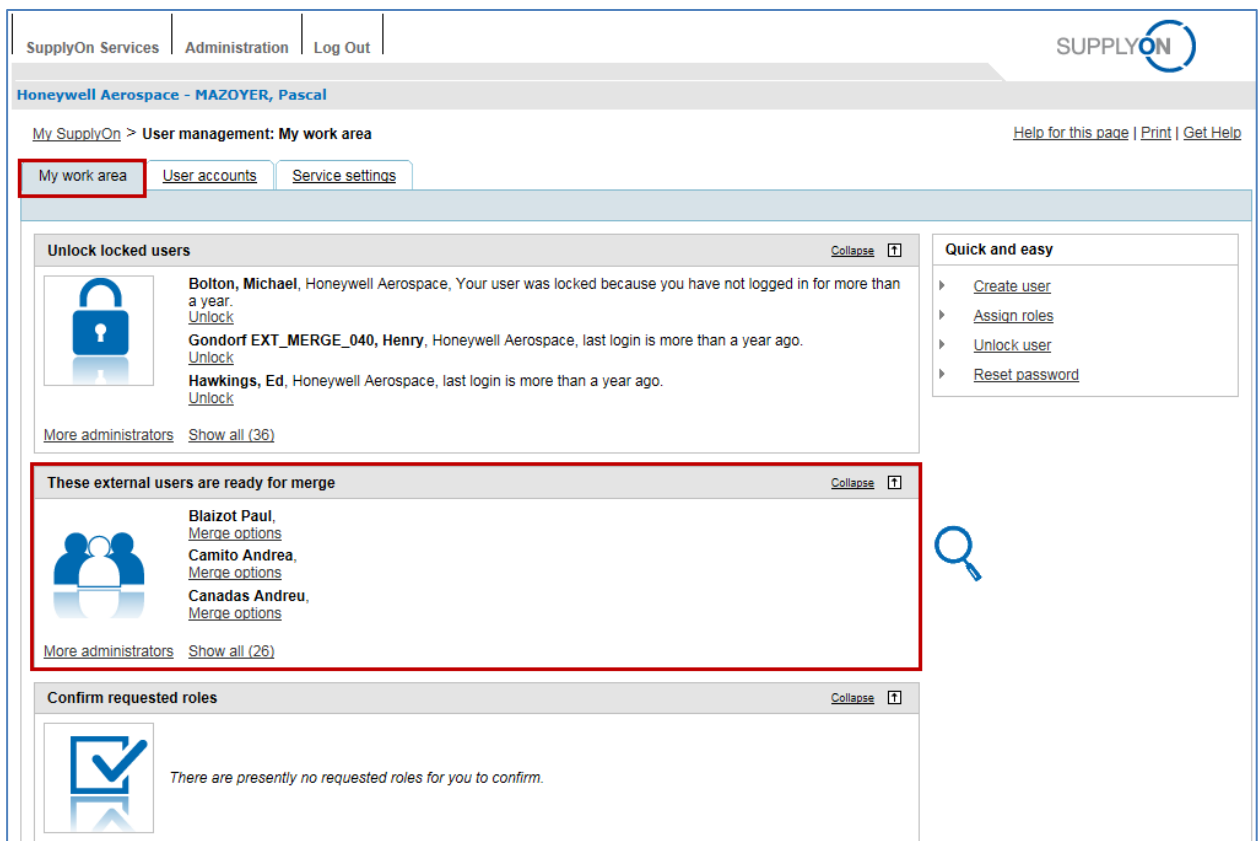
In the center of the screen you can see the 'These external users are ready for merge' panel with a list of 'external' accounts to be merged.

Note: This panel corresponds only to <u>supplier user accounts created on the customer portal</u>. The system displays all existing accounts regardless if supplier user accounts created on the SupplyOn portal exist or not. These accounts are named 'external' accounts.

When you are ready to merge an 'external' account created on the customer portal with an account created on the SupplyOn portal, follow the steps described below.

❷ Click the 'Merge options' button of the selected user.

Blaizot Paul,
Merge options
Camito Andrea,
Merge options
Canadas Andreu,
Merge options
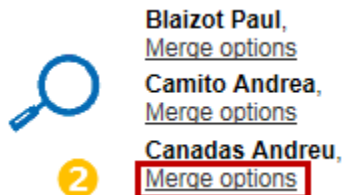
The system displays the 'Select SupplyOn user account' pop-up window:

You have two functions available:

Merge	Merge user accounts. Function displayed by default.
Decline	Decline the task to merge user accounts (e.g. in case the user selected works with a customer via his portal only). This action removes it from the task panel but if it is required in the future, the 'merge' process is still possible via the 'User accounts' tab.

3.4.1.1 Merge function

By default, the 'merge' function is proposed by the system.
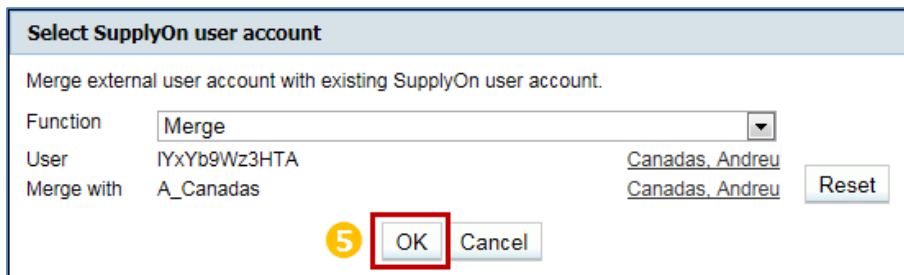
❸ Enter your search criteria (for example last name) to match the selected 'external' account with a SupplyOn portal account.
❹ Click 'Search'.

The following criteria are accepted by the system when searching for an 'external' account created on SupplyOn portal:

User_ID	SupplyOn user Identifier.
First_Name	User first name.
Last_Name	User last name.
E-mail	User email address.

After clicking the 'Search' button, the following pop-up window appears if your search criterion is matching the information stored in the system:
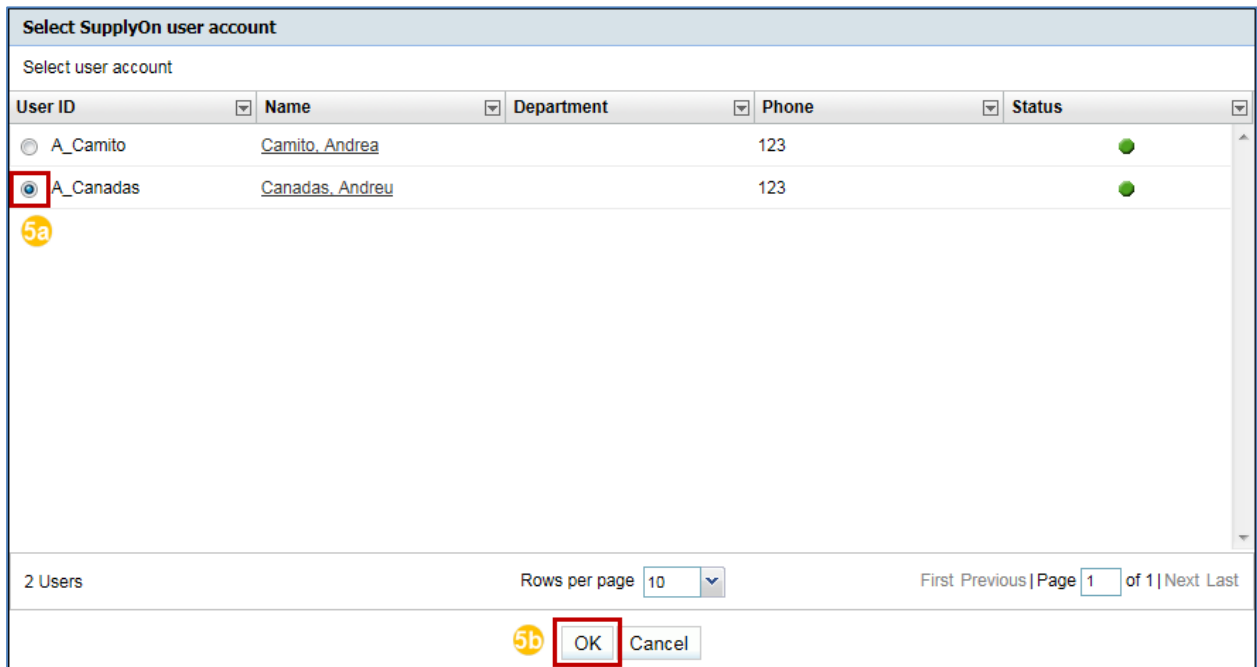
5 Click 'OK' to launch the 'merge' process.

Or

After clicking the 'Search' button, the following pop-up might appear with a list of SupplyOn user accounts if your search criterion is not matching the information stored in the system:

5a Select a user from the displayed list.
5b Click 'OK' to confirm the selection.

After selecting the 'external' account to merge, the following pop-up window appears with the required data:

5c Click 'OK' to launch the 'merge' process.

A confirmation message is displayed, as follows:

You have now merged an 'external' account created on the customer portal with an account created on the SupplyOn portal. The task is removed from the 'These external users are ready for merge' panel:

Note: There is a possibility for the system not to retrieve the account matching with your selection. It could mean that no supplier user account has been previously created on the SupplyOn portal for this selection. In this case, you can ask the system to create a merge account by using the scenario described in Chapter 3.4.3.

3.4.1.2   Decline function

In case a 'decline' function has to be performed:

❶ Select 'Decline' in the dropdown box for 'Function'.

❷ Click 'OK' to confirm your choice.

A confirmation message appears on the top of the screen:

The account to merge is then declined and the task is removed from the 'These external users are ready for merge' panel. However, the 'merge' process is still possible by accessing the 'User accounts' tab in the 'User Management' section, as explained in the following chapter.

3.4.2 Scenario 2: Merging of accounts via a context menu in the 'User Management' section

The supplier administrator can access an 'external' account to merge via a context menu in the 'User Management' section of the GUI.

After a mouse over 'Administration', the system displays a navigation menu as follows:

❶ Click 'User Management'.

The system displays by default the tab 'My work area':

❷ Click the 'User accounts' tab.

❸ Enter your search criteria (for example Name, User ID, E-mail).

❹ Click 'Search'.

According to the criteria previously selected, the following user is displayed on the screen:

❺ Click the drop-down box at the right side of the user ID displayed corresponding to the supplier user account created on the customer portal.

⑥ Click 'Merge options'.

Note: The 'Merge options' menu will not appear for supplier user accounts created on the SupplyOn portal.

The system displays the 'Select SupplyOn user account' pop-up window:

Please follow the instructions explained in Chapter 3.4.1.1 to perform and complete the 'merge' process.

3.4.3 Scenario 3: Adding a role to a customer user account 'ready for merge'

If you know that a supplier user account has never been created on the SupplyOn portal or if you don't find a matching SupplyOn account to a customer user account 'ready for merge' as explained in Chapter 3.4.1.1, you have the possibility to create automatically a merged account.

The supplier administrator has to add a role to a customer user account 'ready for merge' via a context menu in the 'User Management' section of the GUI.

For more information on the way roles are managed on SupplyOn portal, please refer to Chapter [3.3_'My roles' tab].

After a mouse over 'Administration', the system displays a navigation menu as follows:

❶ Click 'User Management'.

The system displays by default the tab 'My work area':

❷ Click the 'User accounts' tab.

③ Enter your search criteria (for example Name, User ID, E-mail).

④ Click 'Search'.

According to the criteria previously selected, the following user is displayed on the screen:

⑤ Click the drop-down box at the right side of the user ID displayed corresponding to the supplier user account created on the customer portal.

6 Click 'Change Roles'.

When a supplier administrator adds a new role to a customer user account 'ready for merge', the following message appears at the top of the screen:
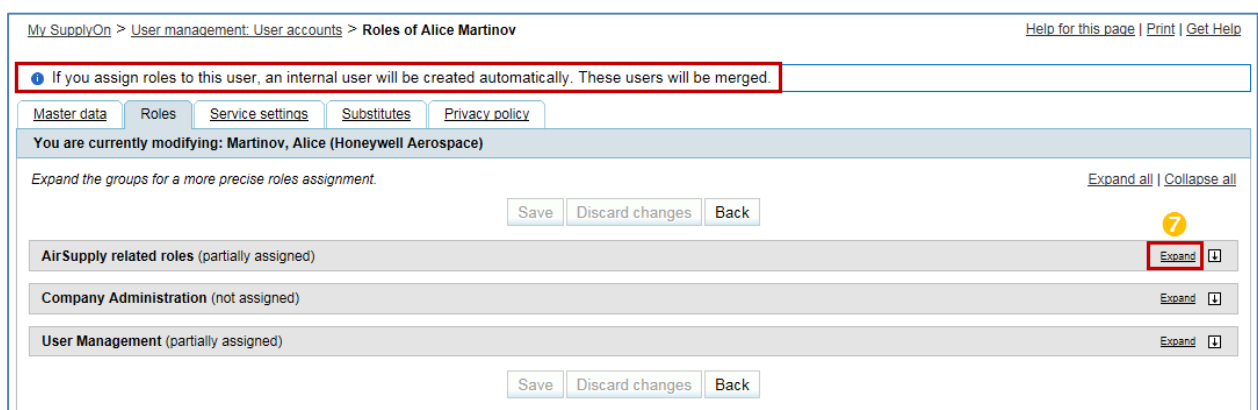
It is displayed under the 'Roles' tab every time you edit a customer user account 'ready for merge'.

Because the supplier administrator cannot add a role to a customer-portal user from SupplyOn portal, the following process will create a new merged SupplyOn user account enabling the global view of a portfolio (for example Airbus data and all other customers' data) within the same session.

7 Click the 'Expand' button corresponding to the AirSupply related roles area.
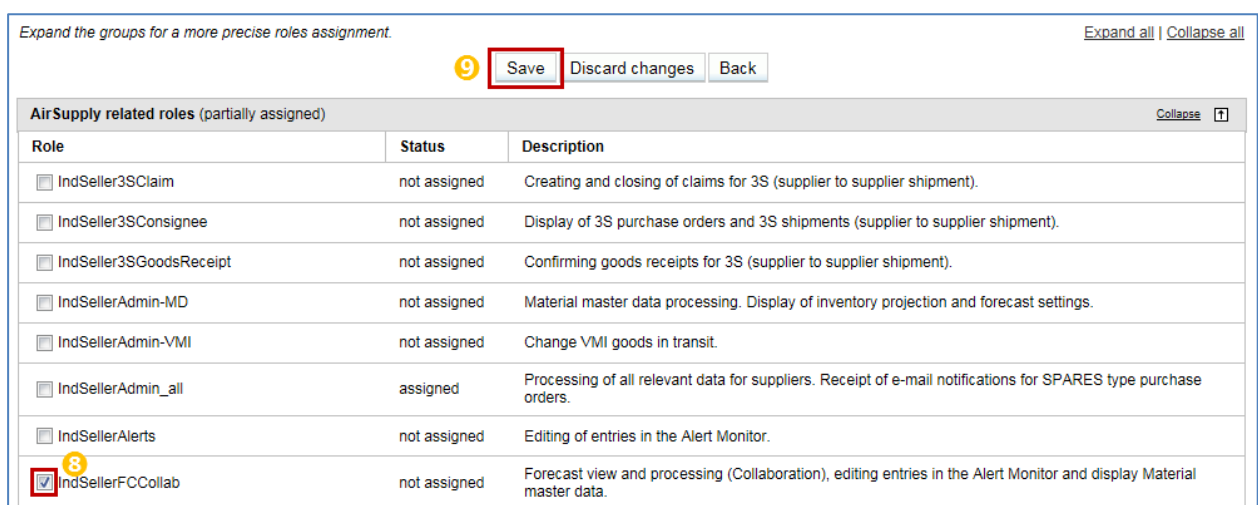
8 Select a new role.

9 Click 'Save' to confirm your choice of creating a new merged account.

A confirmation message appears at the top of the screen, as follows:

Note: If a supplier user account was already existing on the SupplyOn portal for the customer user account 'ready for merge' selected in Chapter 3.4.3, this supplier user account remains in the GUI and the supplier administrator will have to manually delete it as it is not necessary any more.

The new merged supplier account is now created on the SupplyOn portal and the corresponding task is removed from the 'These external users are ready for merge' panel.

Once the process of adding a role to a customer user account 'ready for merge' is finished and after the User Id and Password have been rearranged by the supplier administrator, the supplier user can access to SupplyOn Portal with the new user login, and have the global view of his customer's portfolio.

Note: The supplier user can still access AirSupply directly via the customer portal but the data displayed will be limited to this customer.
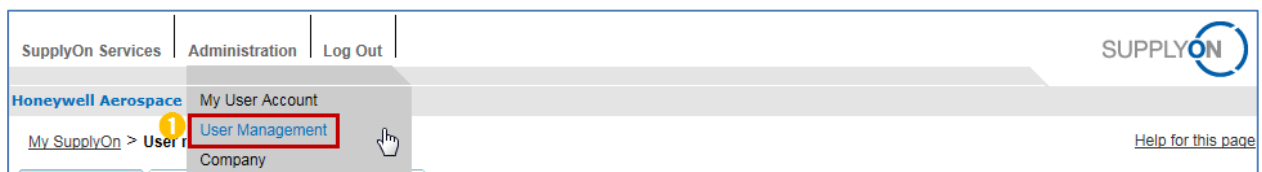
3.4.4 Unmerging process for already merged user accounts

In case of mistake, the supplier administrator can unmerge already merged user accounts. The system will react the following way:
- If the 'merge' process has been done from the administrator task panel (See Chapter 3.4.1.1 for more details) or from the context menu in the 'User Management' section of the GUI (See Chapter 3.4.2 for more details), supplier user accounts previously created on the customer and SupplyOn portals will be <u>restored</u> with their original values.
- If the 'merge' process has been done from adding a role to a customer user account 'ready for merge' (See Chapter 3.4.3 for more details), the supplier user account previously created on the customer portal will be <u>restored</u> with its original values and the supplier user account newly created on the SupplyOn portal will <u>remain active</u> in the system. This last account will have to be deleted manually if needed.

Note: No e-mail notification will be sent to the users selected during the 'unmerge' process.

After a mouse over 'Administration', the system displays a navigation menu as follows:

❶ Click 'User Management'.

The system displays by default the tab 'My work area':

2 Click the 'User accounts' tab.

❸ Enter your search criteria (for example Name, User ID, E-mail).

❹ Click 'Search'.

According to the criteria previously selected, the following user is displayed on the screen:

❺ Click the drop-down box at the right side of the user ID displayed.

❻ Click 'Undo merge'.

Note: The 'Undo merge' menu will not appear for supplier user accounts created on the SupplyOn portal and not initiated by a merge process.

The system displays the 'Undo merge' pop-up window:

7 Click 'OK' to launch the 'unmerge' process.

A confirmation message appears at the top of the screen, as follows:

Once the 'unmerge' action is confirmed by the system, a new task is added in the 'These external users are ready for merge' panel:

Please follow the instructions explained in Chapter 3.4 (Scenario 1, 2 or 3) to perform and complete a new 'merge' process if required.
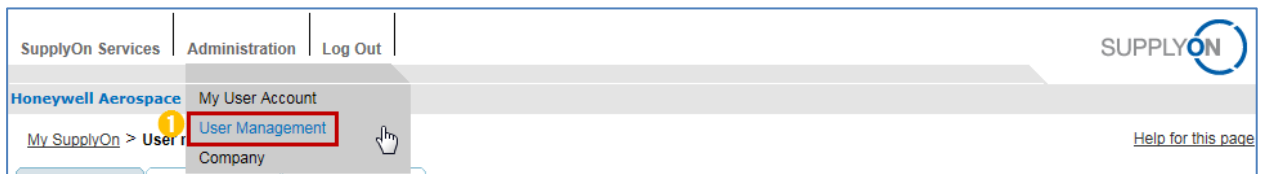
3.4.5 Deleting a merged user account

In case a merged user account is deleted by the supplier administrator, the system will react the following way:

- The supplier user account created on the customer portal (also named 'external' account) is <u>restored</u>. Because the user is then able to connect to AirSupply via the customer portal, the supplier administrator should also delete the restored user account on the customer portal.
- The supplier user account created on the SupplyOn portal is <u>deleted</u>.

Notes: No e-mail notification will be sent to the users selected during the 'delete' process.
If the supplier administrator tries to delete an 'external' account not merged yet on SupplyOn portal, the system will generate an error message as it can only be deleted from the customer portal.

After a mouse over 'Administration', the system displays a navigation menu as follows:

❶ Click 'User Management'.

The system displays by default the tab 'My work area':

❷ Click the 'User accounts' tab.

③ Enter your search criteria (for example Name, User ID, E-mail).

④ Click 'Search'.

According to the criteria previously selected, the following user is displayed on the screen:

⑤ Select the line number(s) corresponding to the merged user account(s) you want to delete.

⑥ Click 'Delete user'.

The system displays the 'Users to be deleted' pop-up window:

⑦ Enter a comment to explain the reason of the deletion (optional task).

⑧ Click 'Delete'.

The system displays the 'Delete user' pop-up window:

⑨ Click 'Yes' to confirm the selection of user account(s) to be deleted.

A confirmation message is displayed, as follows:

Note: The supplier user account created on the customer portal has been restored in the above example.

4   Material and organization monitoring

4.1   Material Master Data screen

In the Dashboard, click 'Settings and master data'.
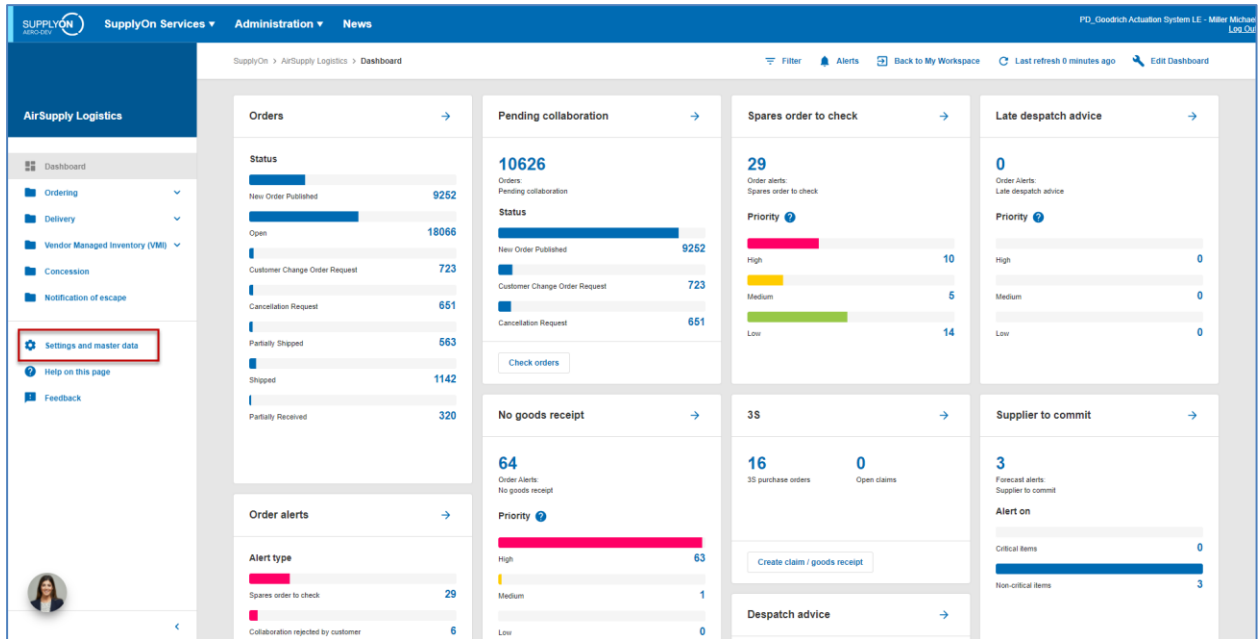
The page 'Settings and master data' displayed.
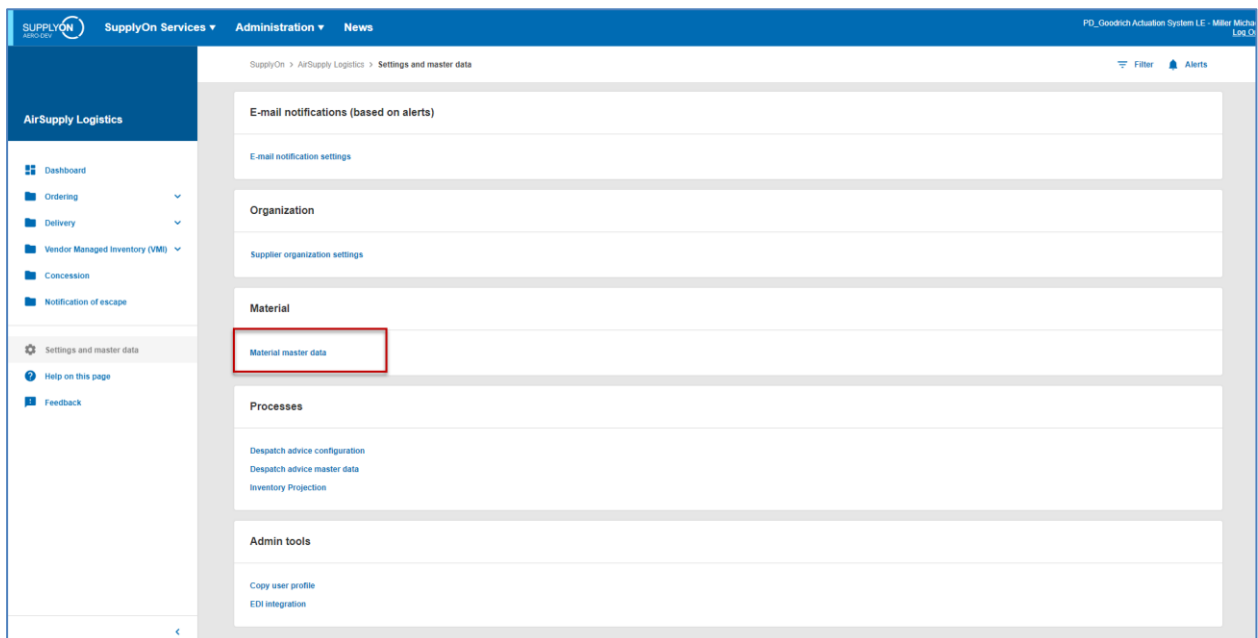
Click 'Material master data'.

The 'Material Master Data' page is displayed.

Note: The description of each column in this table is available in chapter [6_Appendix] at the end of the module.

❶ Back	Display the previous page
❷ Download	- Download with option '**Material Data all fields (CSV)**': Provides all information for the selected materials in the .CSV format. - Download with option '**Displayed Columns Only**': Provides only the displayed columns for the materials selected, in .CSV format. - Download with option '**Material Data Update (XLS)**': Provides all information for the selected materials in XLS format. The file can be opened in Microsoft Excel. This format is ideal if you want to make changes to the material and upload the file again.
❸ Upload XLS	Upload materials in Excel format ('.XLS' extension). Please note that the availability of the master data upload depends on your access rights.
❹ Details	Material Master Data Details, see § 4.1.1 and 4.1.2
❺ History	History of changes to the relevant fields of the selected material: See § 4.1.3
❻ Send E-mail	Prepare and Send an email that contains a link to the material. Please note that the recipient of the email must have access rights in AirSupply, in order to see the material details

Upload and download functionalities are useful in case of massive updates.

4.1.1   Material Details for customers

The 'Material Details' screen for customers is composed of three sections.

Please note that it depends on your access rights whether some fields on the page can be changed (for example AirbBuyerPlantMasterdataAdmin).

The section (❶) is dedicated to the customer organization details.

The section (❷) is dedicated to the material details. The process key can be set to 'Non_VMI' or 'VMI _STD' (VMI standard). For more information, refer to module VMI [RD9].

The section (❸) allows you to fill flexible fields for Customer.

You can fill the one or two available fields for material, and save them, as presented in the screenshot below:

For example, if a customer officer wants to add the name of the supplier responsible, he can do it thanks to the flexible fields. The flexible fields are displayed in the following table, as shown below:

4.1.2 Material Details for suppliers

The configuration of 'Material Details' data is depending on your role. You need a specific role for updating these data (for example AirbSellerOrder).

The 'Material Details' screen for suppliers is composed of three sections.
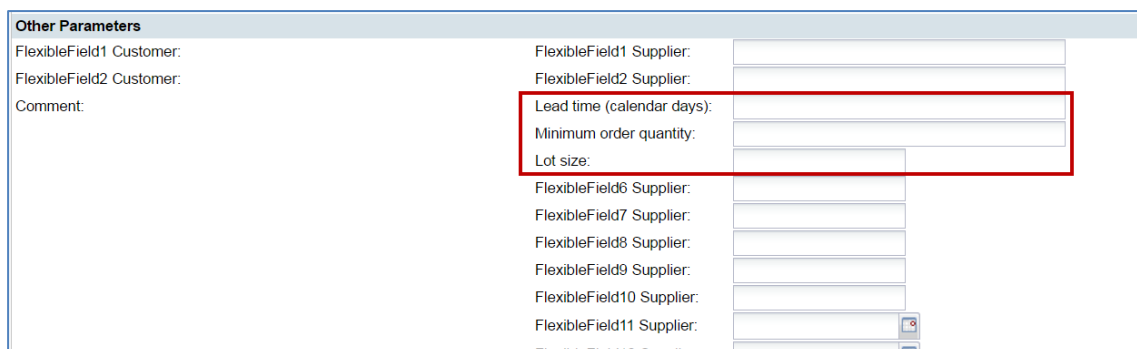
The section (❶) is dedicated to the customer organization details.
In this section, you can define a Supplier Planner Code which enables to link a material to a dedicated person (for example a planner).

The section (❷) is dedicated to the material details.

By default, AirSupply proposes a Supplier Material Number (SMN) equal to the Customer Material Number (CMN).
As a supplier, you can register your own SMN, and the 'Supplier Material Description'.

The section (❸) allows you to fill flexible fields for Supplier.

You find here also the following three fields:
- Lead time (calendar days)
- Minimum order quantity
- Lot size
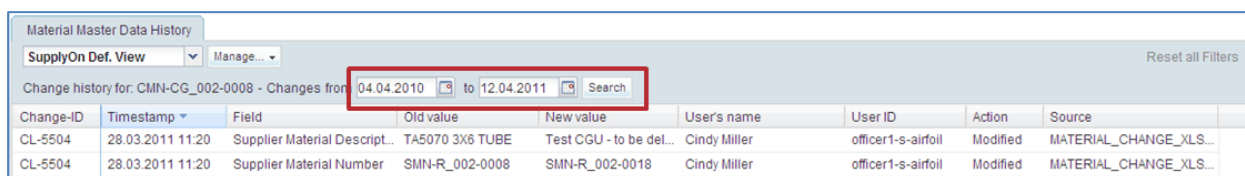
These three fields are important to fill in for the functionality "PowerSearch", described in the Dashboard guide.

4.1.3 Material Master Data History

The history page displays the important changes on a material; by default, all changes of the last 365 days are shown. In order to reduce or expand the time frame, use the date picker and click the button 'Search'.

An example of history page is presented below:

The following columns are displayed:

Change-ID	ID of the change
Timestamp	Date and time of the modification
Field	The field of the Material Master Data in which the value has been changed
Old value	Old value (e.g. previous Supplier Material Description)
New value	New value (e.g. new Supplier Material Description)
User's name	Name of the user who has made the change If the change is done by the system, 'SYSTEM' is displayed
User ID	ID of the user If the change is done by the system, 'SYSTEM' is displayed
Action	Action done (Modified, Added or Deleted)
Source	The source of changes

4.2 Material Master Data alerts

Master Data alerts inform the user on:
- A new material creation.
- An update of VMI parameters.

The alerts for Material Master Data are displayed in the "Material alerts" card.
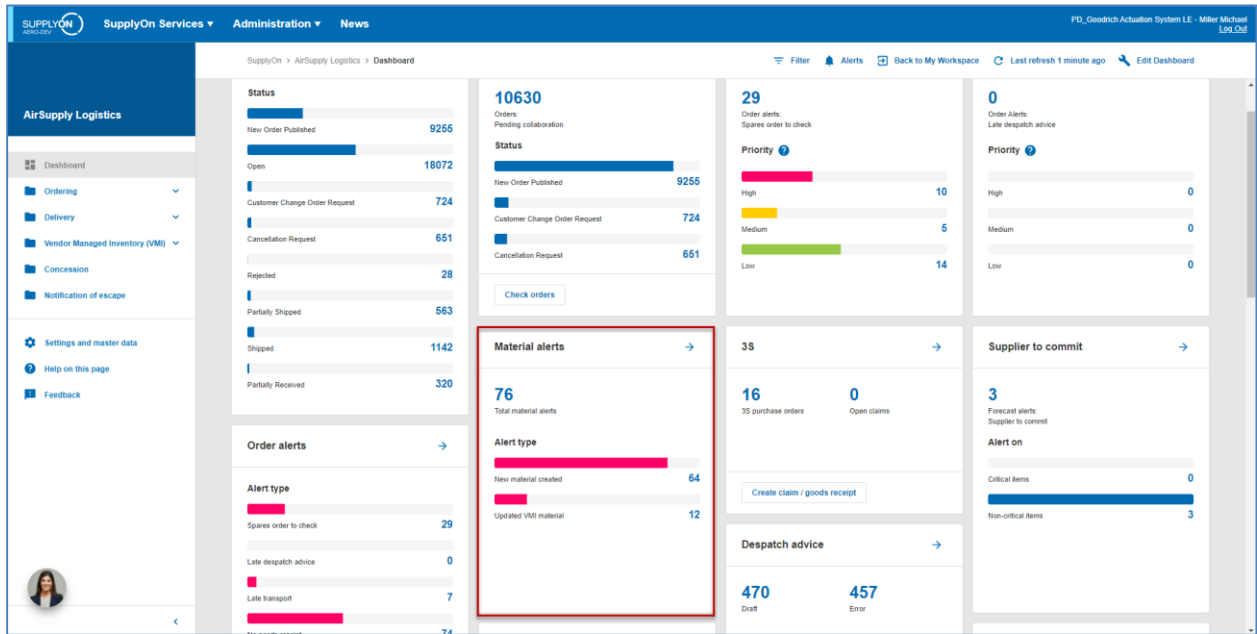
There are two types of alerts:
- 'New material created' (new cross-references).
- 'Updated VMI parameters'.

By clicking 'New material created' counter, you reach the following page.

For searching new customer materials, this search and alert type is useful for supplier users only.

After a new material is created, the supplier can maintain the following cross references in the material master data:

- supplier material number,
- supplier material description,
- supplier planner code.

The main benefit of the supplier maintaining this material master data is the consistency for searching and configuring a filter in the Dashboard.

From the 'MD Alerts' tab, the following buttons are available:
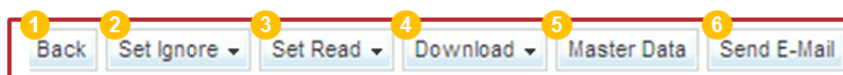
❶ Back	Display the previous page.
❷ Set Ignore	The alert is not raised anymore (total of alert decreases).
❸ Set Read	The alert is still raised but cannot have the 'New' status (total of alert is the same but total of 'New' alert decreases).
❹ Download	Download material master data.
❺ Master Data	Navigate to the master data page either, clicking the customer/supplier material in the master data alert line, or by selecting one or more alert lines and clicking the "Master Data" button.
❻ Send E-mail	Prepare and Send a mail that contains a link to the material. Please note that the recipient of the mail must have the rights in order to see the material details in AirSupply.

Connected as a supplier, the 'Set Read' button (❷) allows you to tag the alerts as read.

For more information regarding alert management, refer to module 'Dashboard'[RD3].

4.3 Despatch Advice Master Data and Despatch Advice configuration (supplier only)

In the Dashboard, click 'Settings and master data'.
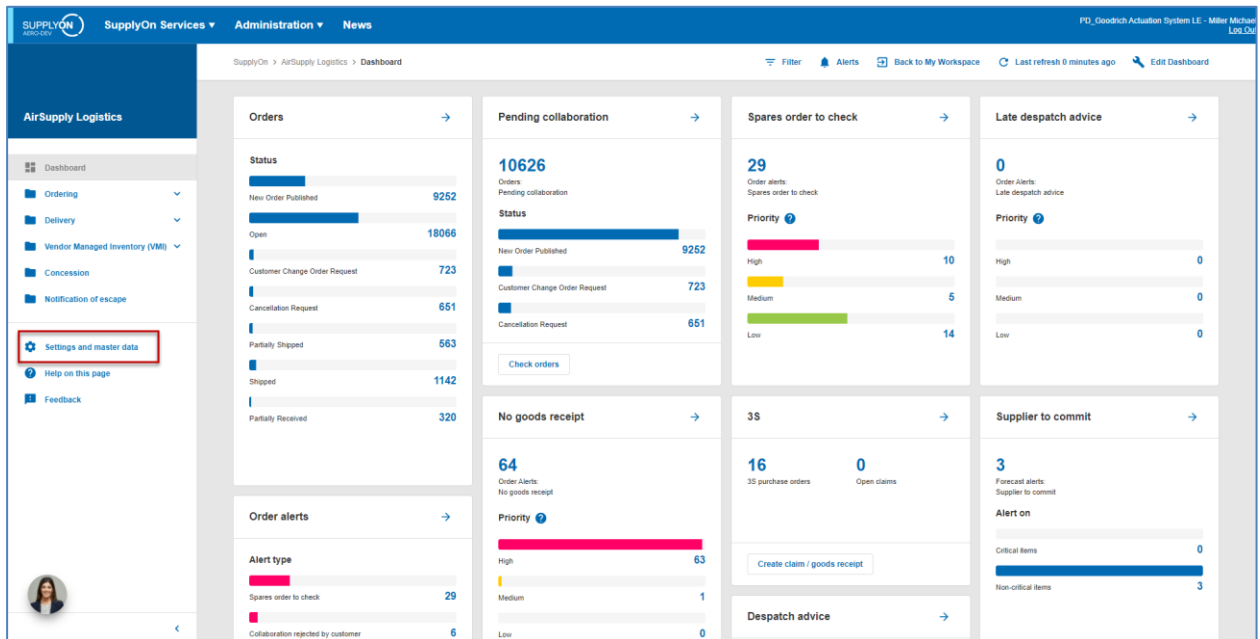
The page 'Settings and master data' displayed.
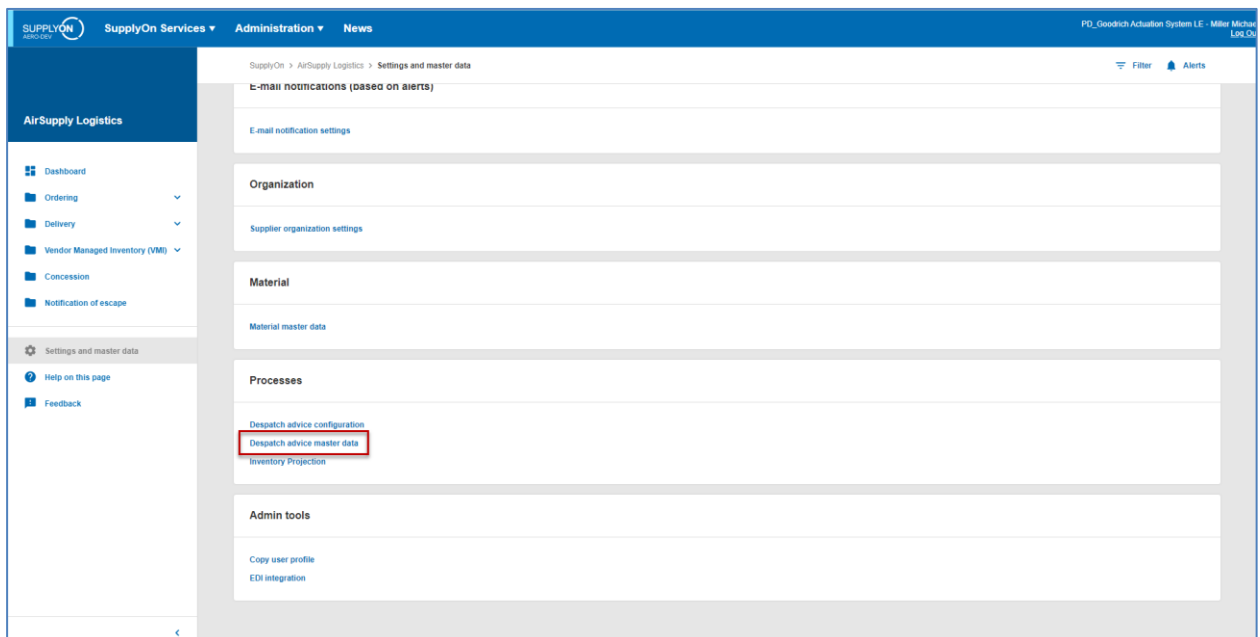
Click 'Despatch advice master data'.

The 'Desp. Adv. Master Data' tab is displayed.

	Type	ID	Name	Name 2	Street	Zip code	City	Country	
☐	Forwarder		Supplier Production Si...		Avenue envoyé		Toulouse	France	
☐	Forwarder		LSP		Forwarder Street 1		London1		
☐	Ship-from		2nd Ship from		Ludwigstr		Hallbergmoos		
☐	Forwarder		UPS		31 route blagnac		toulouse		
☐	Control Point	10006139	TRAINING@ 002-Sup...		Wilsons Lane Longfor...	CV6 6HL	Coventry 49	United Kingdom	

Back Add ▾ Remove View/Edit

You can configure several ship-to and forwarder addresses, if you have the corresponding AirSupply role (for example 'AirbSellerShip' or 'AirSupplyShippingOfficer').

For more information regarding despatch advices, refer to module Shipment [RD4].

4.4 Supplier Organization Settings (supplier only)

The 'Supplier Organization Settings' page is accessed from the Dashboard via the settings and master data.

In the Dashboard, click 'Settings and master data'.
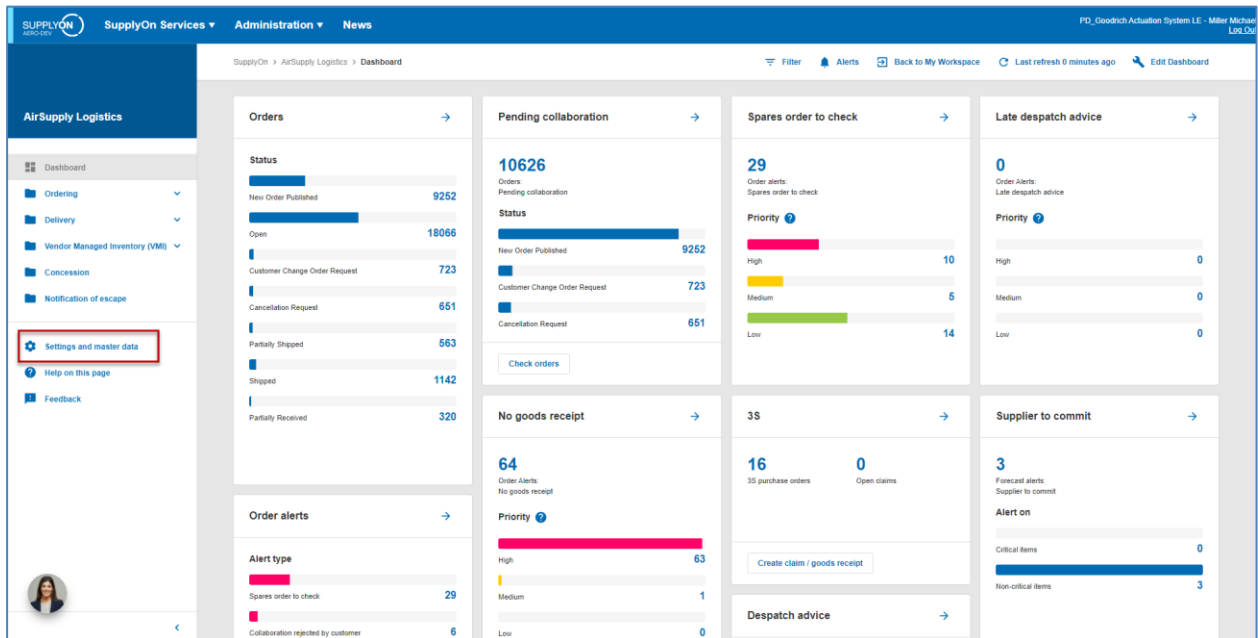
The page 'Settings and master data' displayed.
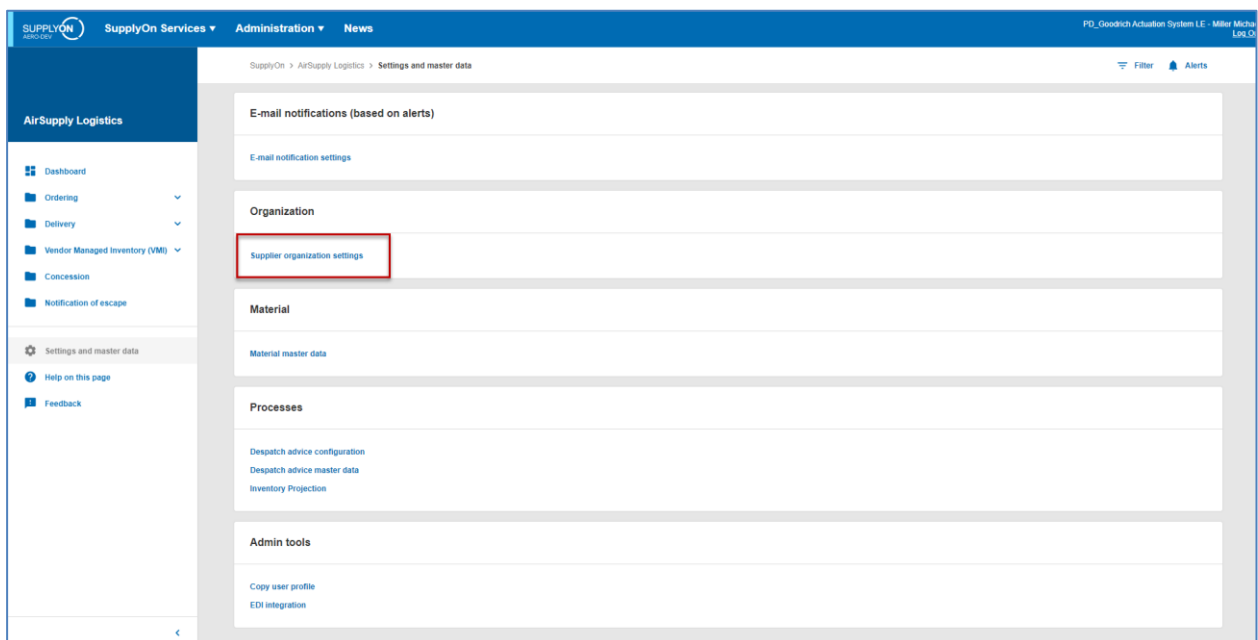
Click 'Supplier organization settings'.

The screenshot below shows the 'Supplier Organisation Settings' screen:

The Supplier Organization Settings is composed of four sections:

- 'Master Data Supplier Organisation',
- 'VMI Parameters',
- 'VMI Planned Receipts Quantity Control',
- 'Forecast Control'.

In the 'Master Data Supplier Organisation' section, the information on your organization is displayed (the Corporate group, Organization (Legal Entity) and Control Point).

Note: This information can only be updated by an administrator.

For VMI sections, configuration settings dedicated to VMI process are explained in module VMI [RD9].

In the 'Forecast control' section, you can activate an auto commit function. Please refer to the help online for the description of this function.

4.5 Customer Site Settings (customer only)

On this page, the SupplyOn administrator can maintain the default settings for the material master data on site level.

The access to 'Customer Site Settings' is done from the settings and master data.

In the Dashboard, click 'Settings and master data'.
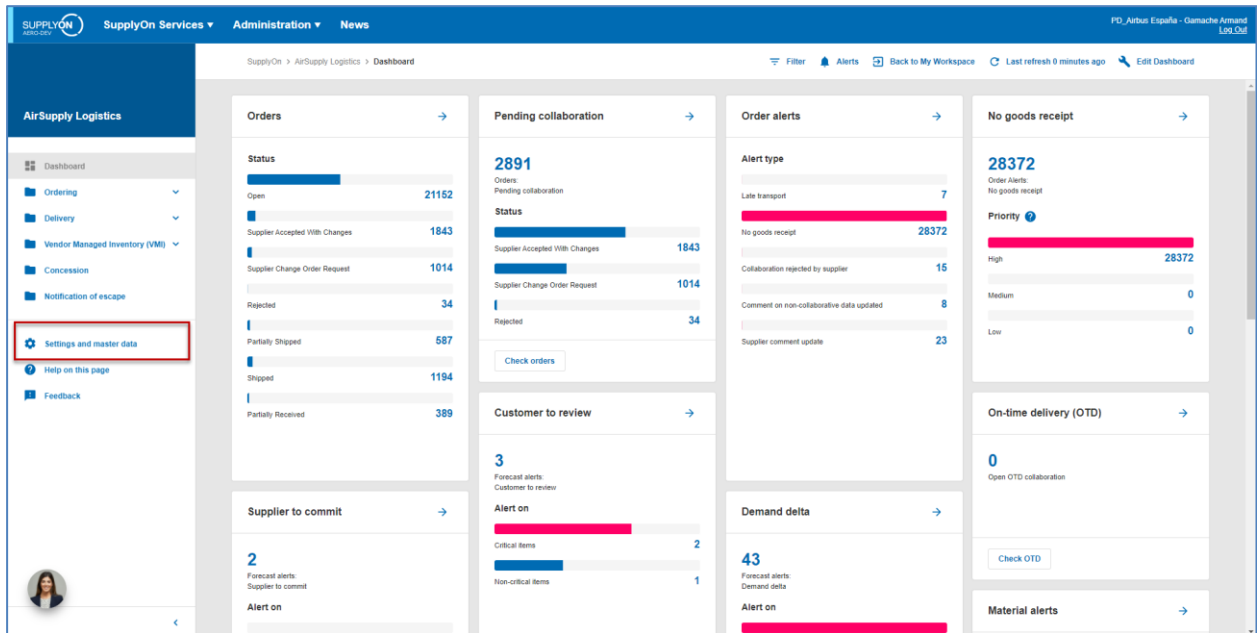
The page 'Settings and master data' displayed.
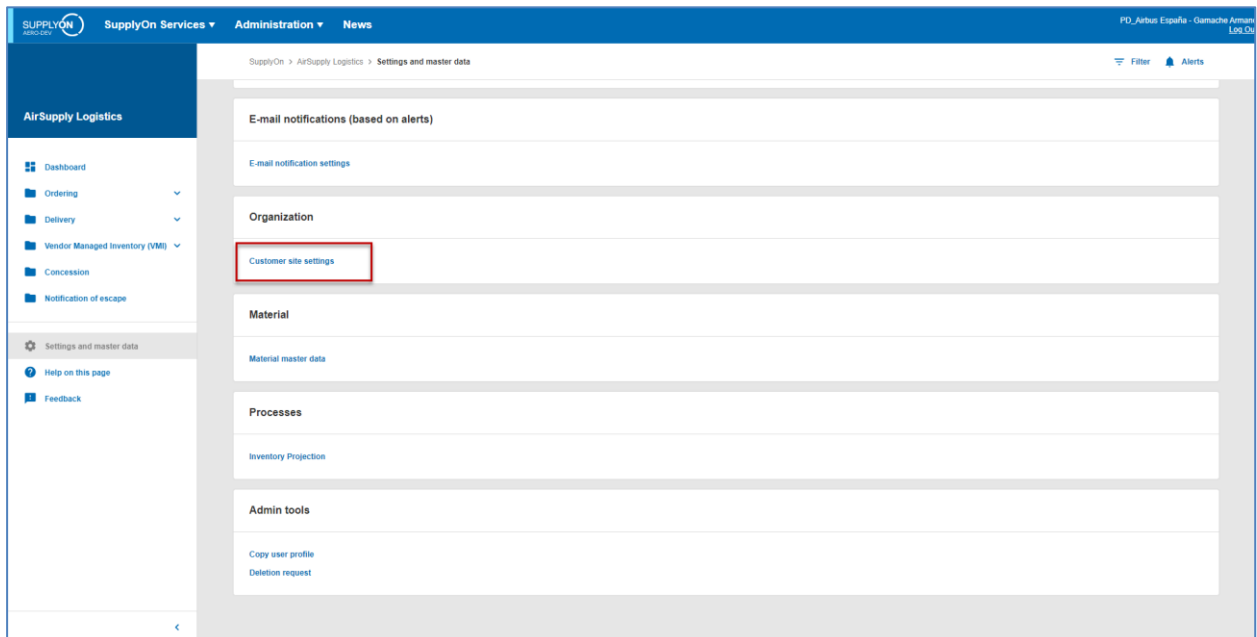
Click 'Customer site settings'.

The screenshot below shows the 'Customer Site Settings' screen:

Cust. Site	ERP Plant	Cust. Org.	Material Grouping Level	Minimum Stock	Signal Stock Quantity	Maximum Stock	Stock Type	Rounding Delivery Quantity	Minimum Delivery Quantity	Averaging Per
DEFAULT	DEFAULT		DEFAULT	5 000	0	10 000	EA	100	1 000	28
AIR11	1110	ASTBUYCG1LE1	S>=&{()}	5 000	0	10 000	EA	100	1 000	280
AIR12	1120	ASTBUYCG1LE1	DEFAULT	5 000	0	10 000	EA	100	1 000	28
MS1	1200	ASTBUYCG1LE2	DEFAULT	5 000	0	10 000	EA	100	1 000	28
AIR13	1130	ASTBUYCG1LE1	DEFAULT	5 000	0	10 000	EA	100	1 000	28
AIR14	1140	ASTBUYCG1LE1	DEFAULT	5 000	0	10 000	EA	100	1 000	28

Back

Note: The description of each column in this table is available in chapter [6_Appendix] at the end of the module.

On the above screen, only users assigned to the role 'AirbBuyerAccountsPayable" or " IndBuyerAdmin-MD" can maintain or configure settings for the VMI material master data at site level.

DEFAULT values
If no data is specified for a customer site the system default will apply. You will find the default value in the line for the Customer Site "DEFAULT". Default values are used to complete the master data of a material, defaults can be overwritten for each material.

Material Grouping Level
This value indicates to which group the materials of the customer site belong to. Changes to material such as supplier material number, supplier material description, or supplier planner code are relating to the same material of other customer sites, if the sites have the same material grouping level.

These customer site settings dedicated to VMI materials are explained in module VMI [DR9].

5 Conclusion

This module has explained how to:

- Understand company organization levels in AirSupply.
- Understand users access rights & roles.
- Access to your personal data.
- Understand the concept of material.
- Check and/or configure material settings.

The following module is the 'Dashboard' module [RD3].

6 Appendix

6.1 Description tables

6.1.1 'Material Master Data' table

GUI Name	Description	Displayed by default (customer)	Displayed by default (supplier)
Averaging Period	Averaging period.		
Comment	Comment.		
Cust. Group	Customer highest organizational level.		x
Cust. Mat. Desc.	Customer Material Description.	x	x
Cust. Mat. No.	Customer Material Number.	x	x
Cust. Org.	Short Name of the customer organization.	x	x
Cust. Site	Customer lowest organizational level (sub-unit of 'Customer Organisation').		
Customer Organization	Organisational sub-unit of 'Customer Group'.		
ERP Plant	ERP Plant Code.	x	x
FlexibleField1 Customer	Field not used yet by customers to publish data.		
FlexibleField1 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField2 Customer	Field not used yet by customers to publish data.		
Lead time	Lead time in calendar days		
Minimum order quantity	Minimum order quantity		
Lot size	Lot size		
FlexibleField6 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField7 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField8 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField9 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField10 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField11 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
FlexibleField12 Supplier	Flexible Field that can be used by the supplier at material Master Data level.		
Maximum Stock	Maximum Stock.		
Minimum Delivery Quantity	Minimum Delivery Quantity.		
Minimum Stock	Minimum Stock.		
Ord. Off. Code	Ordering Officer Code.	x	
Ord. Off. Name	Ordering Officer Name.		x
Ord. Off. Phone	Ordering Officer Phone.		x
Process Key	Process Key.	x	x
Reorder Point Factor	Reorder Point Factor.		
Reorder Quantity Factor	Reorder Quantity Factor.		

Rounding Delivery Quantity	VMI rounding quantity.		
Signal Stock	Signal Stock.		
Stock Type	Material managed using Days of Supply.		
Supp. Mat. No.	Supplier Material Number.	x	x
Supp. No.	Harmonised ERP supplier number.		
Supp.Loc.No.	Local ERP supplier number.	x	
Supplier Group Name	Supplier highest organisational level.		
Supplier Material Description	Supplier Material Description.	x	x
Supplier Planner Code	Stored by the supplier in article master data.		x
Supplier Site	Supplier lowest organisational level (sub-unit of 'Supplier Organisation').		
Supplier Site_City	Concatenation of supplier site and city.	x	
Supplier. Org.	Organisational sub-unit of 'Supplier Group'.		
Transportation Time	VMI transportation time.		
Unit Of Measure	Material unit of measure.		

6.1.2 'MD Alerts' table

GUI Name	Description	Displayed by default (customer)	Displayed by default (supplier)
Alert Creation Date	Date and time alert was created.	x	x
Alert ID	Alert ID generated by system.		
Cust. Group	Customer highest organisational level .		x
Cust. Mat. Desc.	Customer Material Description.	x	x
Cust. Mat. No.	Customer Material Number.	x	x
Cust. Org.	Customer Organisation Short Name.	x	x
Cust. Site	Customer lowest organisational level (sub-unit od 'Customer organisation').		
Customer Organization	Organisational sub-unit of 'Customer Group'.		
ERP Plant	ERP Plant Code.	x	x
Ign.C.	Ignored By Customer.	x	x
Ign.S.	Ignored By Supplier.	x	x
Inactive since	Date when alert situation was resolved.		
MD alert type	Type.	x	x
New/Read Customer	Customer Status New/Read.	x	
New/Read Supplier	Supplier Status New/Read.		x
Ord.Off. Code	Ordering Officer Code.	x	
Ord. Off. Name	Ordering Officer Name.		x
Ord. Off. Phone	Ordering Office Phone.		x
Priority	Priority of alert.	x	x
Supp. Mat. No.	Supplier Material Number.	x	x
Supp. No.	Harmonised ERP supplier number.		
Supp.Loc.No.	Local ERP supplier number.	x	
Supplier Group Name	Supplier highest organisational level.		
Supplier Material Description	Supplier Material Description.	x	x
Supplier Planner Code	Supplier Planner Code.		x
Supplier Site	Supplier lowest organisational level (sub-unit of 'Supplier Organisation').		
Supplier Site_City	Concatenation of supplier site and city.	x	
Supplier. Org.	Organisational sub-unit of 'Supplier Group'.		

6.1.3 'Material Master Data History' table

GUI Name	Description	Displayed by default (customer)	Displayed by default (supplier)
Action	Action done.	x	x
Change-ID	Id of the change.	x	x
Field	Impacted field.	x	x
New value	Value of the field after the change.	x	x
Old Value	Value of the field before the change.	x	x
Source	Sources.	x	x
Timestamp	Date and time of modification.	x	x
User ID	User Id of the person who made the change.	x	x
User's name	Name of the user who made the change.	x	x

6.1.4 'Customer Site Settings' table

GUI Name	Description	Displayed by default (customer)	Displayed by default (supplier)
Cust. Site	Customer lowest organisational level (sub-unit of 'Customer organisation'.	x	
ERP Plant	ERP Plant Code.	x	
Cust. Org.	Customer Organisation Short Name.	x	
Material Grouping Level	Material Grouping Level.	x	
Minimum Stock	Minimum Stock.	x	
Signal Stock Quantity	Signal Stock Quantity.	x	
Maximum Stock	Maximum Stock.	x	
Stock Type	Stock Type.	x	
Rounding Delivery Quantity	Rounding Delivery Quantity.	x	
Minimum Delivery Quantity	Minimum Delivery Quantity.	x	
Averaging Period	Averaging Period .	x	
Transportation Time	Transportation Time.	x	
DoS Calculation Algorithm	DoS Calculation Algorithm.	x	
Day(s)	Days.	x	
Week(s)	Weeks.	x	
Month(s)	Months.	x	
Offset	Offset.	x	
Pl. Rec. editable	Pl. Rec. editable.	x	
Pl. Rec. deleted	Pl. Rec. deleted.	x	
Upd. Warning (h)	Upd. Warning (h).	x	

6.2 Referenced documents

[RD3]: 03_Dasboard_training_guide
[RD6]: 06_Shipment_training_guide
[RD9]: 09_VMI_training_guide