Pirelli Vendor Rating

Follow Up – Supplier Manual

Deloitte Consulting S.p.A.

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Introduction

- It is needed to dispose of

  o a shared portal cockpit to manage the action plans aimed to the improvement of the commercial relationship with the vendors (especially after a valuation campaign)
  o a shared portal area, where both suppliers and buyers can upload documents related to the action plan tasks.

- Through this tool, the suppliers will be able to
  o organize the tasks planned by the reference buyer
  o upload documents in the area shared with the buyer
  o send to the buyer messages related to the documentation provided.

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Follow Up Cockpit

Follow Up Cockpit

After signing in the Pirelli Portal entering userID and password, the user can access the Follow Up Cockpit (cockpit, in the following) through a link in the *Detailed Navigation* panel.

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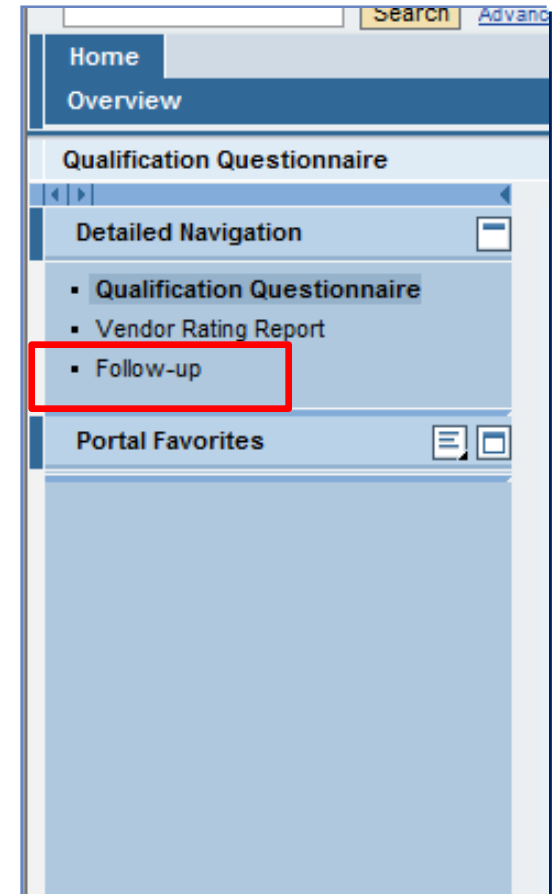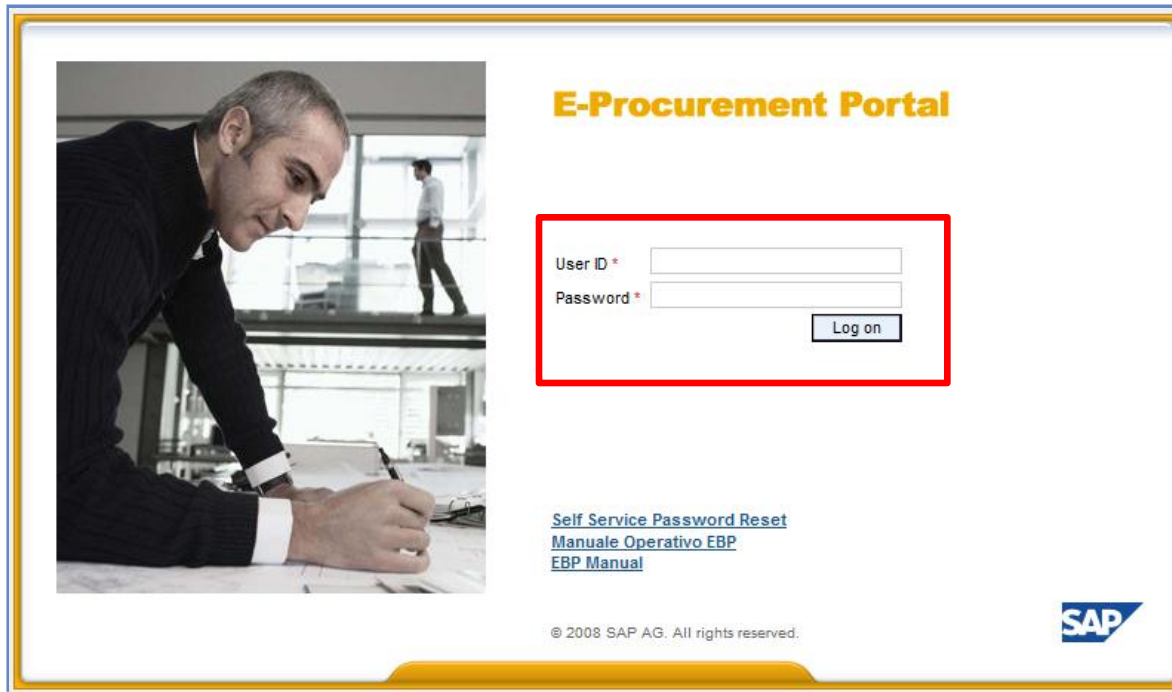
Follow Up Cockpit

The cockpit is divided into 2 sections

Follow Up Query

▼ Hide Quick Criteria Maintenance   Change Query

Industry Code:	◇ ☐	To	☐
Responsible Buyer:	◇ ☐	To	☐
Status:	◇ ☐	To	☐
Due date:	◇ ☐	To	☐
Activity description:	◇ ☐	To	☐
Activity code:	◇ ☐	To	☐
Survey Package Name:	◇ ☐	To	☐

Apply

1

View [Standard View] ▼ | Create | Edit | Delete | Print Version | Export ▲   Filter Settings

BusPartner	Vendor description	Survey Package Name	Industry Code	Resp. Buyer	Activity description	Activity code	Due date
1113955	ABB S.p.A	test local 20.06.2011	MM10	RENDAMA001A	Enviroment performace of the supplier	H01	31.12.2011
1113955	ABB S.p.A	test local 20.06.2011	MM10	RENDAMA001A	Safety performance of the supplier	H02	
1113955	ABB S.p.A	test local 20.06.2011	MM10	COMUCAL001	Material Safety Data Sheet in local language	H03	

Last Refresh **04.07.2011 17:10:33 CET** Refresh

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Follow Up Cockpit

In the first section, it is possible to search through the tasks specifying the searching parameters

- **Industry Code**
- **Responsible Buyer**
- **Status** of the task
- **Due date** (the expected end-date of the action plan)
- **Activity description**
- **Activity Code** (ID of the question in the Vendor Rating Questionnaire, if the activity is inserted after the result of a Vendor Rating Campaign)
- **Survey Package Name** (identifies the Vendor Rating Campaign).

By clicking on the button [Apply] the selection will be executed.

In particular, five statuses are available:
- **NEW**: for the newly created tasks
  IN ACTION SUPPLIER-IN ACTION PIRELLI: since no automatic e-mail will be sent when the vendor o the buyer updates a task (i.e. upload of new documents or creation of new tasks), is necessary to **set manually the status of the task** to show who last modified the task or the documentation on the related cFolders (so IN ACTION SUPPLIER means that the next action is expected on behalf of the supplier's side).
- **CLOSED**: for the ended task (only a buyer can close a task)
- **DELETE**: for the deleted tasks. This status is set automatically when the buyer deletes a task (only a buyer can close a task).

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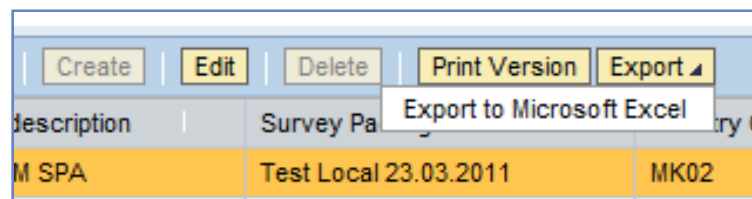**PIRELLI**

Follow Up Cockpit

In the second section, the list of all the tasks regarding the specific supplier is shown. Each record has the following fields:

- **Business Partner**
- **Vendor description**
- **Survey Package Name**
- **Industry Code**
- **Responsible Buyer**
- **Activity description**
- **Activity Code**
- **Due Date** (expected end date of the action plan)
- **Status description**
- **Data Source** indicating whether the task has been inserted automatically ("A") or manually ("M")
- **cFolders** (link the shared area).

The following actions are available for the supplier:
- **Modify** the status of a selected task, by clicking on the button **Edit** (the only available status is IN ACTION SUPPLIER)
- **Export to Microsoft Excel** the list of the tasks.

In particular, the vendor cannot create a new task or close/delete an existing task.

Create	Edit	Delete	Print Version	Export ◢
			Export to Microsoft Excel	
description		Survey Pa...		try C
M SPA		Test Local 23.03.2011		MK02

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cFolders
Create new documents

cFolders

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ENGLISH - German version below

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(in english and in german).

Click on ACCEPT at the bottom of the page.

| ACCEPT | REJECT |

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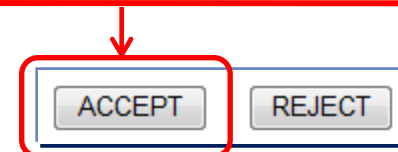
cFolders

The name of the main folder has the form "*SRM code of the vendor – Name of the vendor"*. It contains the folder *FOLLOW UP,* which includes one subfolder for each Survey Package (= Vendor Rating Campaign) containing the vendor.

In the left panel is displayed the hierarchy of the folders, while in the right panel the *Folder Contents* are displayed, showing the subfolders and the document list with the available actions.

The header of the windows reports the currently browsed folder.

The tick near the file name indicates that the file has been already read by the currently logged user.

cFolders
Create a new document

To create a new document in the current folder, click on the button *Create*, then choose *Document* and click on Save.
After saving, the new folder will be displayed in the left panel, under the corresponding containing folder.
Click on *Cancel* to stop the creation of a new document.

Note: a supplier has no authorization to create a new folder.

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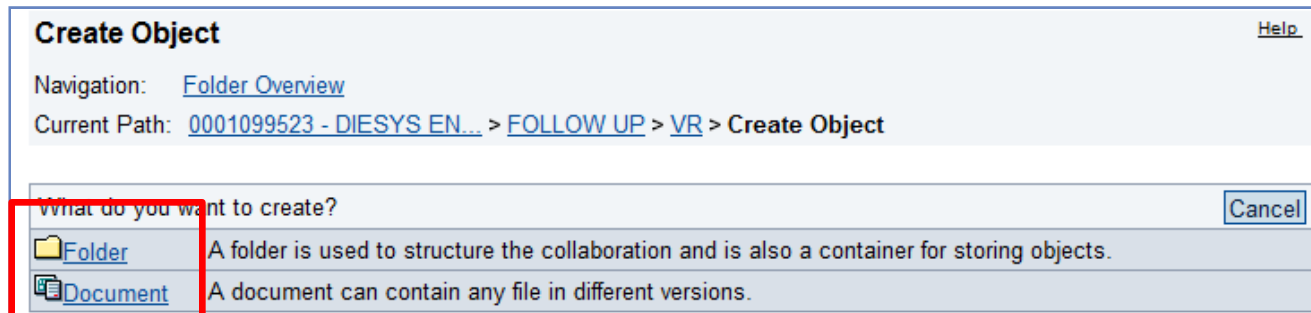
cFolders
Create a new document

If you choose to create a new document, in the following screen you will have to enter the name of the document and eventually the description.
In the field Categorization choose Follow-up Document.
You must also choose between
- *Upload Local File*
- *Create File Later*.
Then click on *Continue*.

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cFolders
Create a new document

If you select *Upload Local File*, in the following screen you must select the file from your computer by clicking on the button *Browse*.
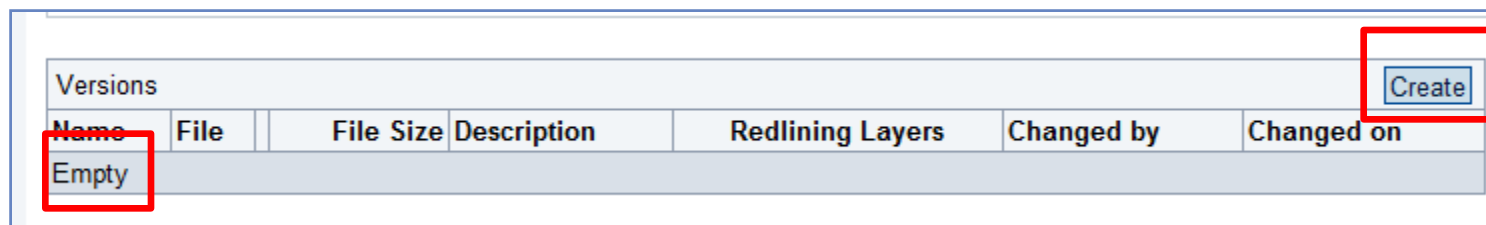Then click on *Save*.
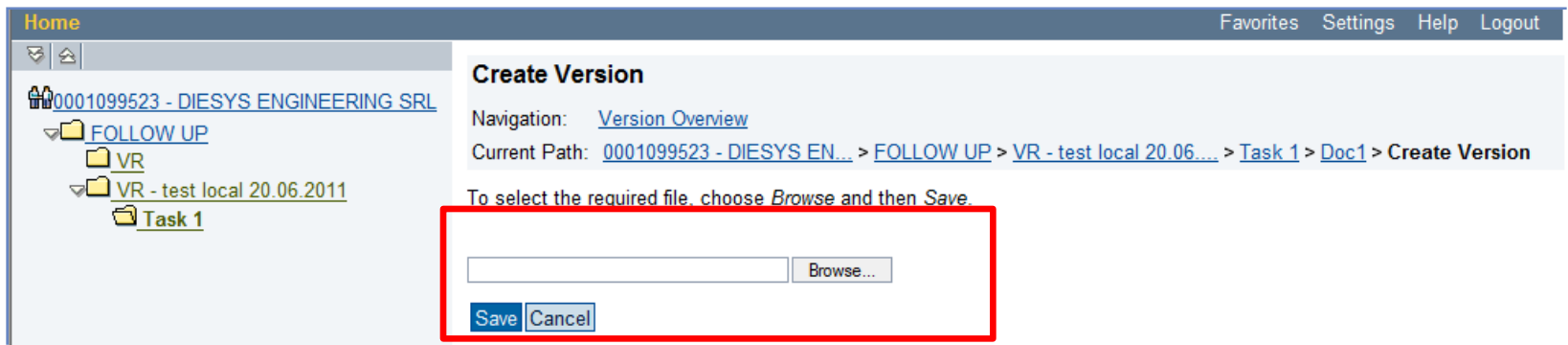
cFolders
Create new folder/document

If you select *Create File Later*, no file will be associated to the document, but the user will have to create a new version of it.

Clicking on the name of the document, in the *Folder Contents* panel, the document will be empty.

To create a new version of a document, click on the button *Create* in the *Versions* panel, and then choose the file from your computer.
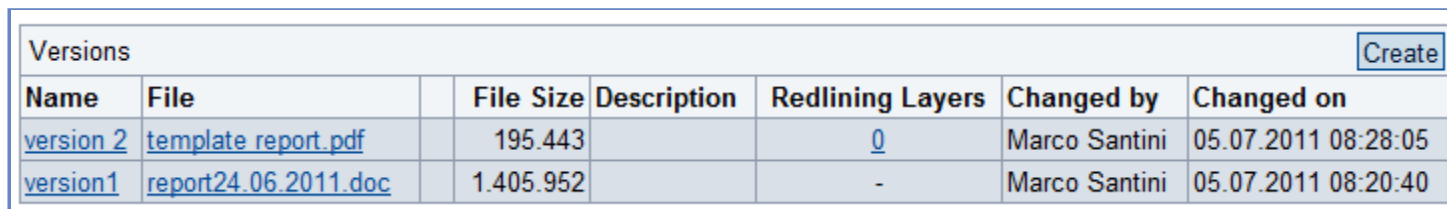
Versions							Create
Name	File		File Size	Description	Redlining Layers	Changed by	Changed on
Empty							

In the document list inside the folder, always the last created version will be displayed. By clicking on the document name, it is possible to see all the previous versions, in the *Versions* panel related to the document.

To open the document click on the file name.

Versions							Create
Name	File		File Size	Description	Redlining Layers	Changed by	Changed on
version 2	template report.pdf		195.443		0	Marco Santini	05.07.2011 08:28:05
version1	report24.06.2011.doc		1.405.952		-	Marco Santini	05.07.2011 08:20:40

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Notifications

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cFolders
Notifications

The supplier is allowed to send a message to the reference buyer only when this message is related to a document: it is not possible to send notifications at a folder level.
To enter the messages area, click on the document name, then on the button *Notifications*.
It is possible to filter the messages editing the fields *Notification Filter* and *Time period* and clicking on *Select.*
To create a new message, click on the button *Create.*

cFolders
Notifications

It is possible to modify the standard subject, set the priority and enter the text of the message.
Please note that, since the message will not be saved as a "sent item", if you want to keep trace of the sent notifications, you must include your own name as a recipient of the message.
Finally click on *Send*.

Create Notification

Current Path: 0001099523 - DIESYS EN... > FOLLOW UP > VR - test local 20.06.... > Task 1 > Document task1 > **Create Notification**

Create Notification	
Priority	☐ High
Subject	Notification Document task1 *
Comment	
Recipient	All None
	☑ Alessandra Comucci
	☐ CFX Remote
	☑ Marco Santini

Send Cancel

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