MICROS Materials Control

Bid Management

micros®
Materials Control

Product Version **8.8.00.47.1491**

Table of Contents

Introduction

This document will explain in detail the features related to the module Bid Management in Materials Control.

The minimum required version of Materials Control is 8.7.20.30.1418. This manual is based on version 8.8.00.47.1491.

Functionality

The purpose of this module is to offer the purchase department a tool to create a clear analysis of incoming price offers.
This module allows to create lists of articles, so called "Purchase Bids" and could be used to gather prices from several suppliers, compare those and create price quotes out of them.

This module offers the following features:
 ➢ Creation of article lists
 ➢ Export/Import of prices
 ➢ Creation of Price Quotes
 ➢ Creation of Assortments
 ➢ Creation of Order Baskets
 ➢ Article Assessments for e.g. "Blind Testing"
 ➢ Supplier Assessments

Purchase Bids

The new module Bid Management is located in the menu section "Purchase". Here the Bid Lists can be created, edited and analysed.

User Rights:

In order to control the access and use of this module some new user rights were implemented.
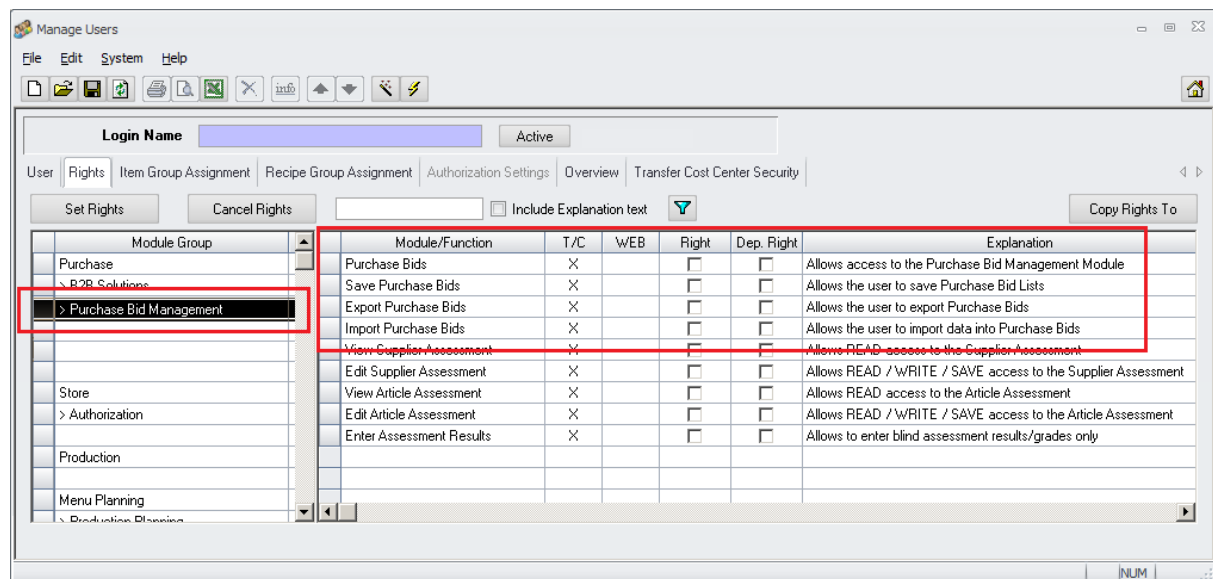
Purchase Bids:

This user right allows the general access to the module. Please keep in mind that this right is required also to access included sub-functions like e.g. Supplier Assessment (Please see the chapter below.).

Save Purchase Bids:

Having this right a user can create new Purchase Bid Lists as well as edit and save existing ones.

Export Purchase Bids:

This user right is required to export the Purchase Bid Lists to the listed suppliers.

Import Purchase Bids:

This user right is required to import the Purchase Bid Lists returned from the listed suppliers.

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 5 of 75

Reason Codes:

At several places in the Bid Management the system will ask for Reason Codes after creation/change of data. This is required because every change could have massive impact once an article is quoted with a specific supplier.

Some usual Reason Codes could be:
  - ➢ Bid Sheet Setup Details edited
  - ➢ Manual Price Maintenance (if a price was edited manually)
  - ➢ Supplier unlisted (if a supplier was removed from the Bid Sheet)
  - ➢ Best Price
  - ➢ Best Payback
  - ➢ Best Delivery Conditions

Besides "normal" Reason Codes also Tendering Codes can be used in the Bid Management module. These Codes should be used to explain why a specific supplier was selected.
It is recommended to create a separate set of Tendering Codes and mark them as such (e.g. with a suffix "(TC)") even if they are sometimes duplicates to the "normal" Reason Codes.

Some usual Tendering Codes could be:
  - ➢ Best Price (TC)
  - ➢ Best Payback (TC)
  - ➢ Best Delivery Conditions (TC)
  - ➢ Quality Decision (TC)
  - ➢ Management Decision (TC)

Depending on the configuration [BidManagement] > TendCodeMand the use of these codes is mandatory if not the cheapest price was selected:
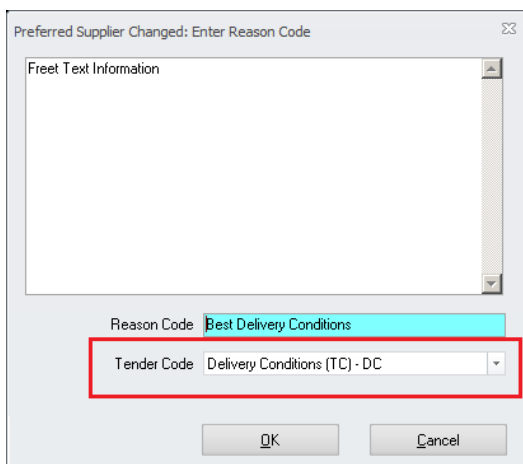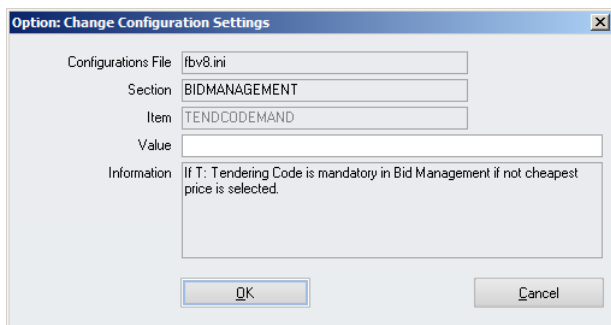
These Reason/Tendering Codes should be created in advance.

Go to Master Data > Reason Codes:
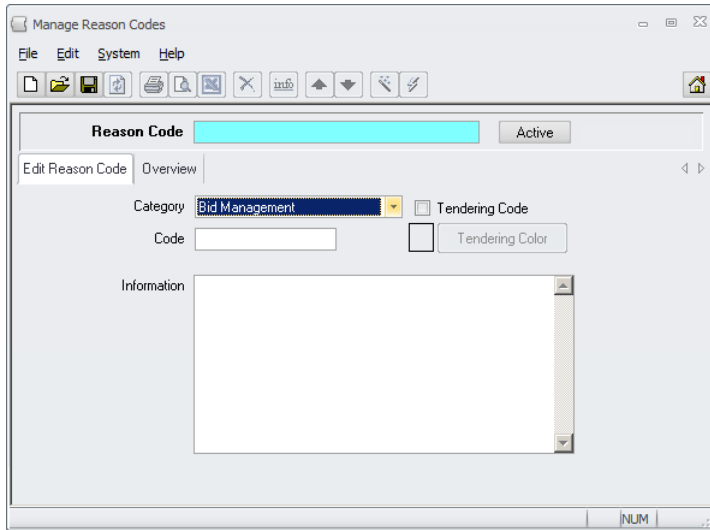
Here the required Reason Codes can be created.
- Enter the Code Name
- Select the Category "Bid Management"
- A alpha-numeric Code number can be added (optional)
- Free text information can also be added (optional)
- The checkbox "Tendering Code" could be activated to mark this code as such (optional)
- A color code could be selected per tendering code.
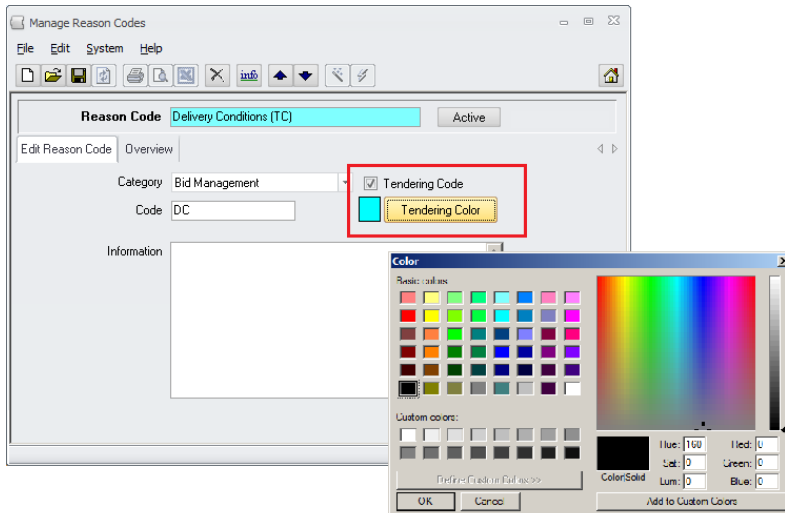
By default the application already shows the cheapest prices with a yellow/green background. In order to align this feature now with the Tendering Codes the application automatically creates one Tendering Code on its own:
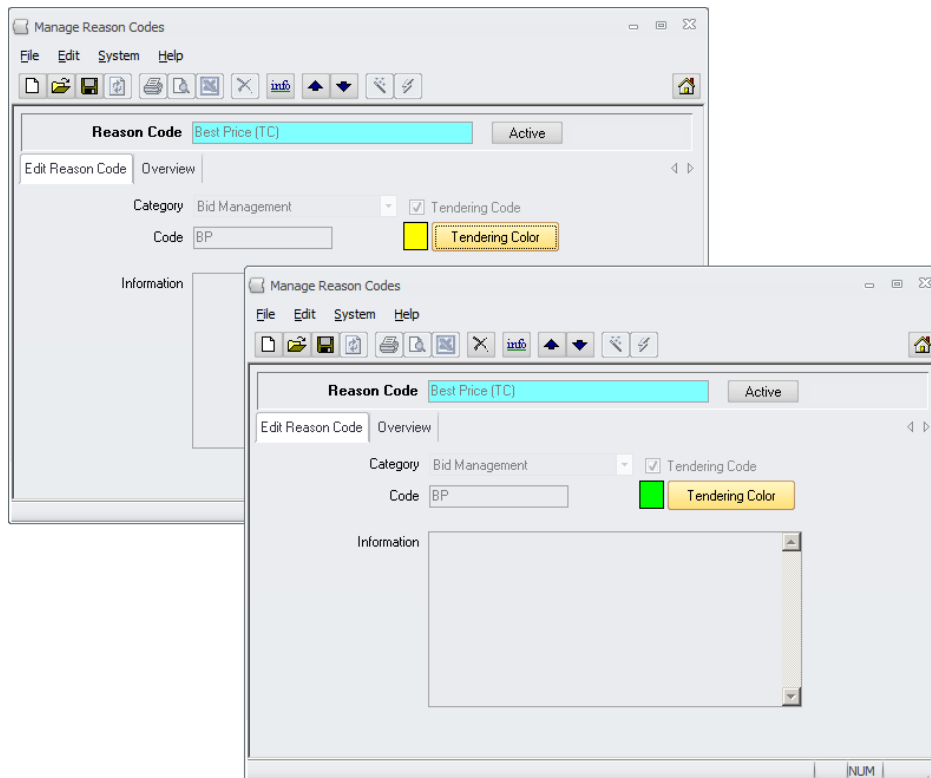
Name: Best Price (TC)
Category: Bid Management
Code: BP
Tendering Code: active
Color:

Up to Version 8.7.30.xx: yellow (default color for cheapest price)

Version 8.8.00.xx and higher: in this version the default color for the cheapest price
was changed from yellow to green. During the update the application will change all
existing Tendering Codes using green to white and assign green to the Best Price
Tendering Code.
Please make sure that all Tendering Codes have a different color assigned.

Yellow is used for the second cheapest price now when BID_MODE =2.
Before activating BID_MODE 2, please read the related chapter below. The handling of
the application will change massively!

Except the Name and the Short Code it is **not at all** recommended to change anything on this record.

Please open the configuration and look for [BidManagement] > TendCode1Label:
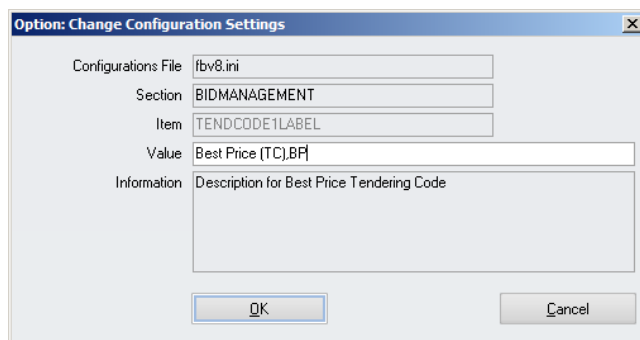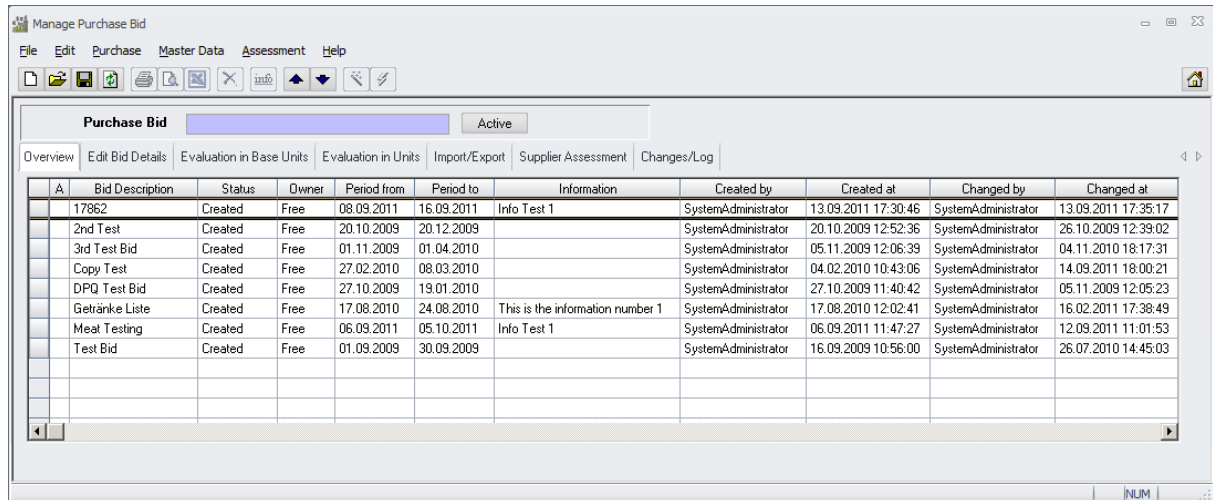
Here the Tendering Code Name and the Short Code could be adjusted.

On the Overview tab the existing Reason Codes can be reviewed and selected for editing as usual:
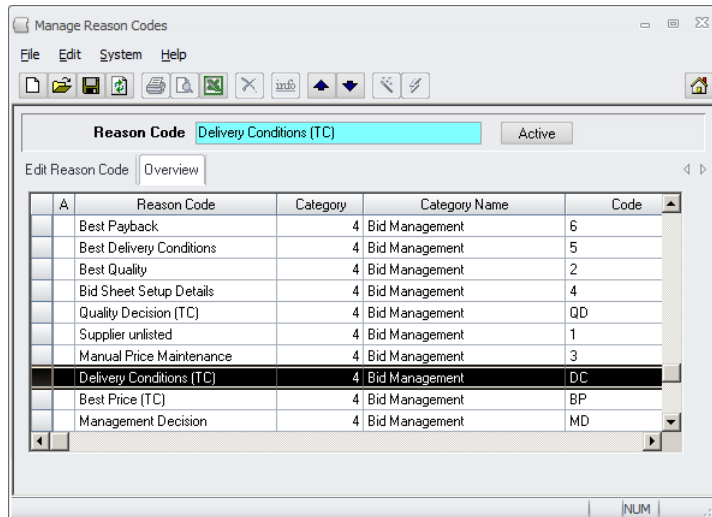
Setup of Purchase Bids:

This chapter will explain the setup and use of Purchase Bids.

The module itself consists of 7 main tabs:

Overview:
> ➢ On the 1st tab all existing Purchase Bids are listed.

Edit Bid Details:
> ➢ After selecting a Purchase Bid from the Overview or when creating a new one, you can change or define the main details, like Time Period and Suppliers.

Evaluation in Base Units:
> ➢ Here the articles will be added.

Evaluation in Units:
> ➢ The main comparison can be viewed under this tab. Also located here are several functions to create quotes and assortments.

Import/Export:
> ➢ This tab contains the functions to export and import the Purchase Bid Lists for/from the suppliers.

Supplier Assessment:
> ➢ Here the results of the last assessments done for the suppliers in this Purchase Bid are shown.

Changes/Log:
> ➢ On this tab all changes done in the Purchase Bid can be reviewed.

Overview

When accessing the module first the filter dialog is shown:

This dialog allows to search for a specific Bid Sheet or to adjust the sorting in advance:

- ➢ Bid Description:
  Here the user could select directly a specific Bid Sheet:

- ➢ Supplier:
  This function allows the user to filter for Bid Sheets on which a specific supplier is listed:

> ➢ Time Period:
> This option allows to filter for Bid Sheets where the start- and/or end time are in the selected time period.

> ➢ Sorted by:
> This section allows to adjust the sorting of the documents in the grid:
>   • Bid Description
>   o The Bid Sheets are sorted by name in alphabetical sequence
>
>   • Status
>   o The sheets are sorted by status (Created / Edited / Exported / Closed)
>
>   • Owner
>   o The sheets are sorted by owner.
>   NOTE: Keep in mind that a user can see his own and free documents only!
>
>   • Period Start
>   o The sheets are sorted by "Period from" starting with the oldest.
>
>   • Show Closed Purchase Bids
>   o By default all bid sheets in status "Closed" are hidden. This will help to keep the overview in the list of documents.
>   Mark this checkbox to include the closed bid sheets into the previous filter criterias.

After selecting the filter options the overview screen shows all valid Purchase Bids.

Using double click on the column headers it can be sorted by any other criteria listed.

Column Description:

A: Active/Inactive. The records will be shown in red, marked with an X in this column if the Purchase Bid was set to inactive.

Bid Description: This is the name of the Purchase Bid

Status: Here the status of the Bid List is displayed.
- Created:
  The Purchase Bid was created, period was defined, suppliers and articles were added, but nothing else was done.

- Edited:
  Any detail figure was edited either manually or through import.

- Exported:
  The Purchase Bid was exported to at least one supplier.

- Closed:
  The Purchase Bid was closed (see below.)

Owner: This column shows the owner of the Bid List. The user can see free Bid Sheets and those which are assigned to him.

Period from/to: Here the validity time range is shown.

Information: This column shows the content of the "Information 1" field from the section "Note to Supplier".

Created by/at: In this column the creator and creation-date/time stamp are shown.

Changed by/at: Here the last change date/time stamp and the related user are shown.

Exported by/at: In these two columns the last export to a supplier is recorded with user name and date/time stamp.

Imported by/at: In these two columns the last import from a supplier is recorded with user name and date/time stamp.

Functions:
Change Owner   At the bottom of the screen the button "Change Owner" used to handover the Bid Sheet to another user.
The application will show here only users which have the user rights to access the module at all.
The change of the owner will be written into the Bid Header Log.

Edit Bid Details

On this tab the main parameters of the Purchase Bid are defined.

In the header section the Purchase Bid name is shown (and can be edited).
When you change the name of an existing Purchase Bid, the system will ask you for free text information when you try to save. Entry of this information is optional.

These changes are recorded in the Bid Header Log.

Period from/to: Here the validation range for the Purchase Bid is defined. If the system is configured to use the Future Price Quotes functionality, the time period entered will also be used for the price quotes. (see documentation "132_MC_Future_Price_Quotes").
If a user changes the period defined for an existing Purchase Bid, the following dialog will be shown when you click save:
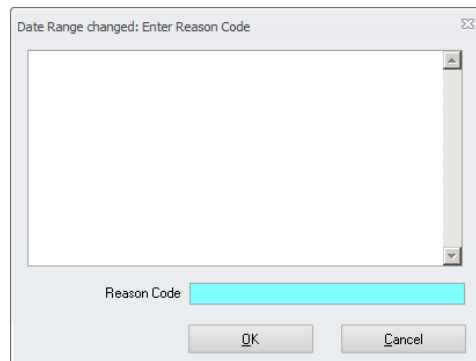
Here the user **must** enter a free text information and **must** select a reason code. Both fields are mandatory! This change will be recorded in the Bid Header Log.
(See chapter Reason Codes)

Return Bid until: Define expected Return Date for supplier prices. This field is also shown in the Excel Export sent to the supplier. This date cannot be defined on a past date.

Note to Supplier:
Information 1 & 2:   Free text information field

Conclusion: Free text field to enter a final conclusion for this Purchase Bid.

Excel Summary Export Version: Here a version counter is shown. This number shows the consecutive version number of the Excel Export done on the tab "Evaluation in Base Units". For further details please see the related chapter below.

Supplier Grid (right side):
-    Supplier Selection field: Here the suppliers to be added can be selected.
-    Supplier: This column shows the supplier name.
-    Customer Number: This is the main customer number. Customer numbers per cost center /store are not shown since a purchase bid is not related to a specific cost center.
-    Notes: Here the content of the Information field in Supplier >
   Contract Information is shown.
-    Assessment: If there have been any previous for this supplier the
                                  average grade of the last assessment is displayed here. If at least one detail grade was higher than 3 it will be shown in red!
                                  (For details about Supplier Assessments please see the related chapter
                                  below.)

If a user adds a new supplier to an existing Purchase Bid, at saving the system will show the following dialog:
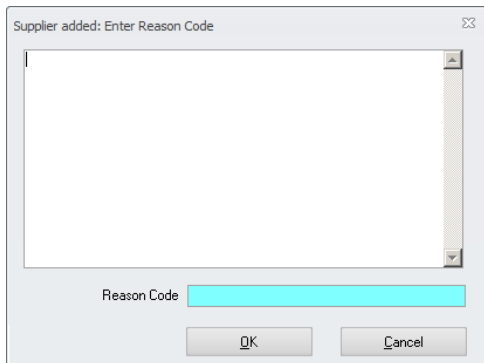
Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory!
This change will be recorded in the Bid Header Log.
(See chapter Reason Codes)
Suppliers can be removed on the tab "Evaluation in Units".

Toolbar -> Print/Preview:

From the current tab the Summary Reports also can be printed.
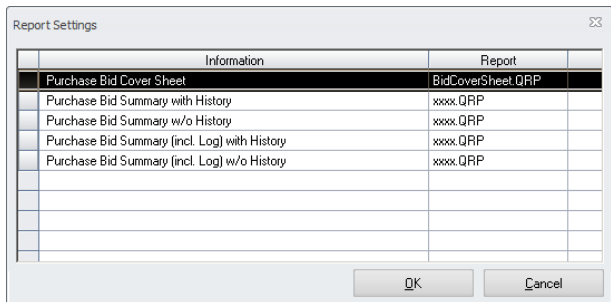
Purchase Bid Cover Sheet
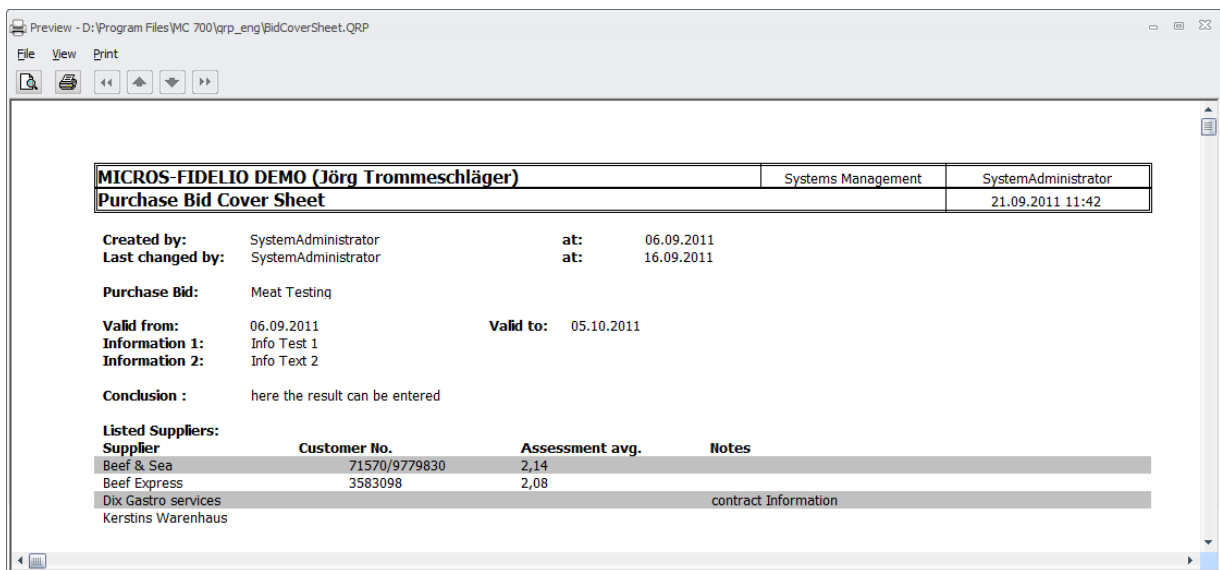
This report shows the data from the tab "Edit Bid Details".

The following four lines are Report Batches defined as below:

"Purchase Bid Summary with History" will print:
- Purchase Bid Cover Sheet
- Bid Management with PH
- Evaluation in Units
- Best Price Differences

"Purchase Bid Summary w/o History" will print:
- Purchase Bid Cover Sheet
- Bid Management without PH
- Evaluation in Units
- Best Price Differences

"Purchase Bid Summary (incl. Log) with History" will print:
- Purchase Bid Cover Sheet
- Bid Management with PH
- Evaluation in Units
- Bid Header Log
- Bid Detail Log

"Purchase Bid Summary (incl. Log) w/o History" will print:
- Purchase Bid Cover Sheet
- Bid Management without PH
- Evaluation in Units
- Bid Header Log
- Bid Detail Log

Definition of Terms:
- Bid Management with PH
  This report shows details from the tab "Evaluation in Base Units" including figures from the loaded Purchase History.

Bid Management without PH
- This report shows details from the tab "Evaluation in Base Units" without figures from the loaded Purchase History.

Evaluation in Units
- This report shows the details from the tab "Evaluation in Units".

Best Price Differences
- This report shows a comparison between the selected/preferred price and the best price listed in the Purchase Bid. This report can be printed from the tab "Evaluation in Units" as well.
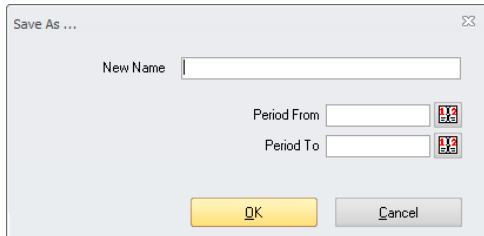
Bid Header Log
- This report shows all entries from the tab "Changes/Log" > "Header Log".

Bid Detail Log
- This report shows all entries from the tab "Changes/Log" > "Detail Log".

Save as …

In the "File" menu the system also allows to use the function "Save as …". This allows the user to create copy of the current Purchase Bid for i.e. recurring Bids.

After definition of the name for the new Purchase Bid the validation time range must also be defined. After confirmation with "OK" the system will ask again for free text information:
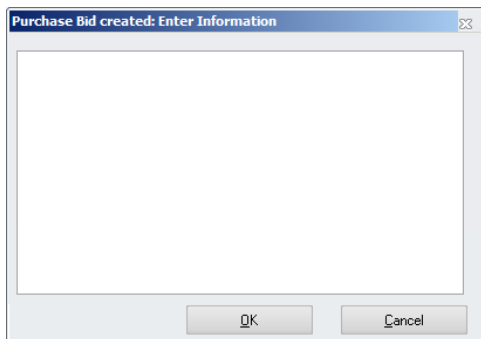
This text is optional. Once confirmed again the system will create a fresh copy of the previously selected Purchase Bid, but this time without prices.

Functions:

Close Purchase Bid
This function allows to close a Purchase Bid. When pressing this button the application will ask for confirmation:
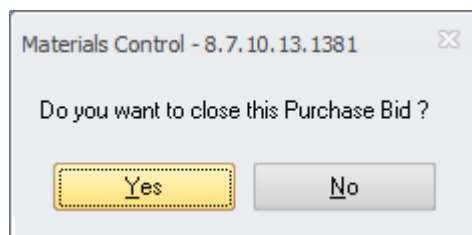
Once confirmed the Purchase Bid will be set to "read-only". No figures can be changed anymore. Also export and import are no longer possible.

Viewing/printing of reports still is possible.

Change Status
This function allows to set the current purchase bid to any status. On click the following screen comes up:
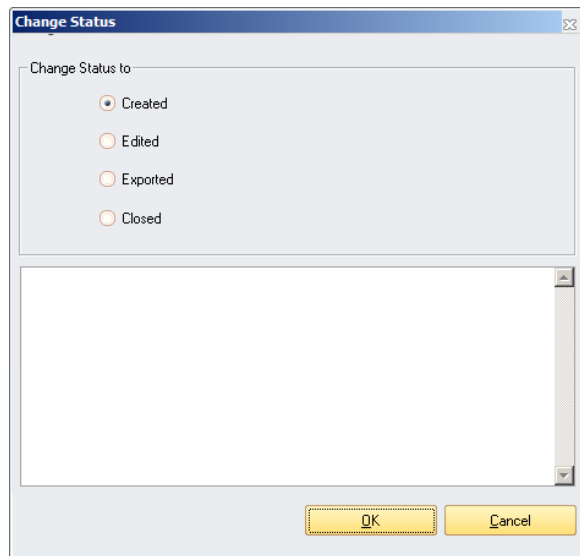
The current status always is selected at the top and must be changed manually to avoid accidental changes.

To change the status here manually the application always requests some information as text which is stored in the Bid Header Log.

NOTE: This function also allows to re-open already closed Bid Sheets!

Evaluation in Base Units

Here the content of the Purchase Bid is defined.


Screen Details:

Toolbar:

New:
Click here to create a new Purchase Bid. The system will switch to the tab "Edit Bid Details".

Open:
Clicking this icon will open the search dialog and then switch to the "Overview" tab.

Save:
Click this icon to save the Purchase Bid in the current state. Depending on the last changes the system will ask for a text note and/or a reason code (partially mandatory!).

Refresh:
Refresh of current view.

Print/Preview:
These two functions allow you to select which report you would like to view/print. Currently 2 reports are available:
- o   Bid Management with/without Purchase History
- o   Best Price Differences

Excel:
Export of current grid to MS Excel.
Based on the configuration [BidManagement] > EvalBUnitExp_RO this export is write protected by default.
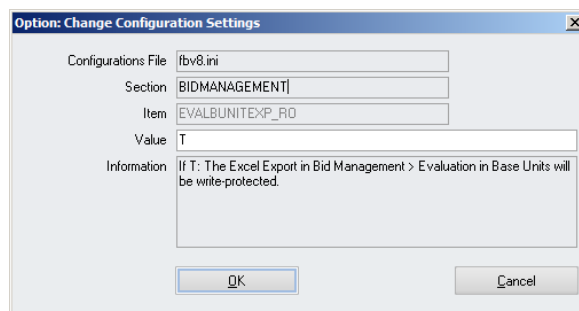
If required the protection could be removed via (MS Excel) "Review" > "Unprotect Sheet".

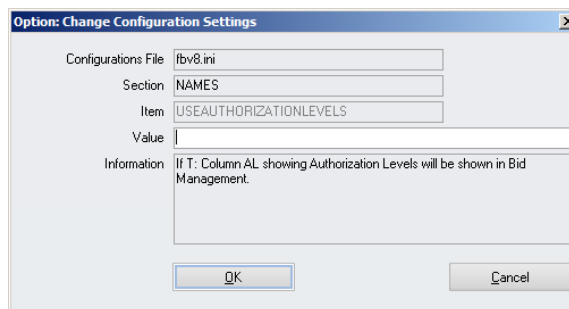Please see the separate chapter below explaining the exported Excel sheet.

Delete: Click here to delete the Purchase Bid.

Grid:

AL: Authorization Level assigned to the Article.
This column could be hidden. Activate the configuration parameter [NAMES] > UseAuthorizationLevels:

Pos: Position Number for Sorting

Article: Article Name

{Product Specification}:   If activated: This column shows the first 30 characters of the content of the Article Master Data > Product Specification.

Unit: This is the base unit of the Article

{QTY PP}:   If activated: Total quantity in base unit purchased during the selected Purchase History Period

{AVE/Last Pr. PP}:   If activated: Average or Last Price, calculated from purchase in the selected Purchase History Period.
Based on the selected price type also the column description is changed:
          ▪   Last Pr. PP: Last Price of previous period
          ▪   AVE Pr. PP: Average Price of previous period

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
                       Page 21 of 75

{Total PP}:	If activated: Total sum of QTY PP * (AVE Pr. PP or Last Pr. PP)
{PP Supplier}:	If activated: Last Supplier (available only if Price Method "Last Price" was selected in Purchase History)
Pref. Price:	Selected Price from listed Bids
Pref. Supplier:	Supplier for selected Price
T. Code:	Selected Tendering Code.

If prices are available: The system will automatically assign the (internally created) Tendering Code "Best Price (TC)" to the position having the cheapest price and mark the price records green. This can be changed then manually.
Just click into the field and select the Code from the list:

The selected price will now, instead of the green background, be marked in the color assigned to the selected Tendering Code.

If no prices are available: The field will be blank. No Code could be selected until a price was entered.
For further details please read the related chapter.
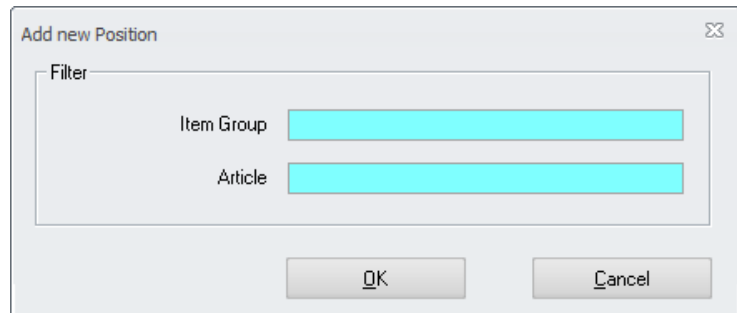
{Supplier Name}:	For each supplier the prices will be listed in a separate column. In case of existing Supplier Assessments the average rating will be displayed bracketed () in the column header.
{Tot. [Supplier Name]}:	If activated: QTY PP * Supplier's Price
{Assm.}:	If activated: In case of existing Article Assessments the results for the supplier's sample will be shown here.
Best Price:	This column shows the best price available in the current Purchase Bid.
Selected Price:	Selected Price from listed Bids
BP/SP Difference in Amount:	Difference in value between best and selected price.
BP/SP Difference in %:	Deviation in % between best and selected price.
Prev. Period Price:	AVE price from Purchase History Period
PPP/SP Difference in Amount:	Difference in value between selected and Prev. Period Price.

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 22 of 75

PPP/SP Difference in %:   Deviation in % between selected and Prev. Period Price.

Buttons/Flags:

Add Position: Click this button to add one or more articles to the Purchase Bid. The following dialog is displayed:

Two options are available:
- o Item Group: The system will load all articles assigned to the selected item group into the Purchase Bid.
- o Article: The system will add the selected article to the Purchase Bid.
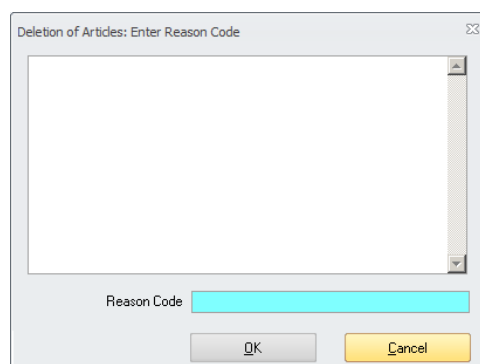
Reorganize Pos: This function can be used to influence the sorting within the Purchase Bid. The system sorts by default by article name. Click on this button to generate a position number for each row. Now the user could manually adjust these numbers to change the sorting.

Delete Flag: Mark a record and click on this button to remove (mark for removal) a position from the Purchase Bid. At saving the Purchase Bid the system will show the following dialog:

Here the user **must** enter some free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
                   Page 24 of 75

| Summary: | Click this button to view the summary of the current bid: |

Here the system lists all articles and their prices from each supplier.
Fields marked in green show the price that is the preferred Bid.
At the bottom the system shows two total figures per column:
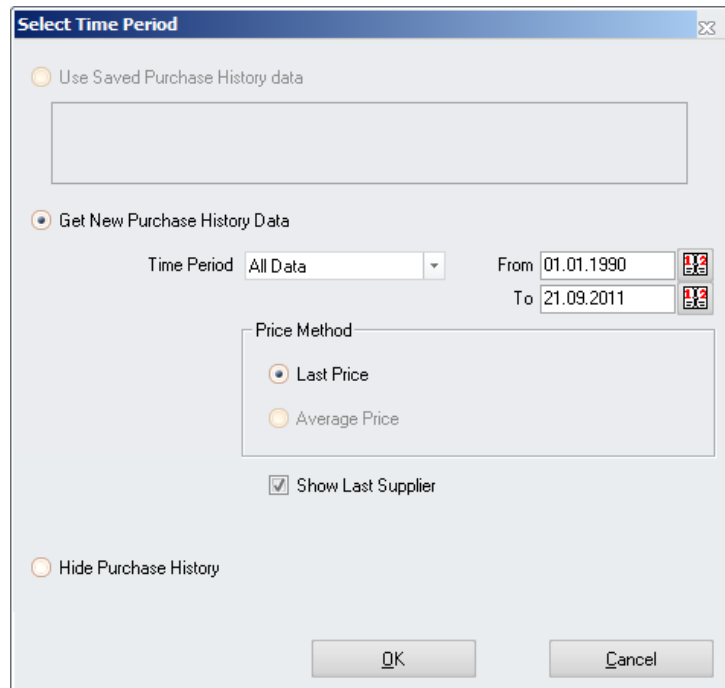
- o TOTAL:
  This is the Total Sum of the prices marked as preferred from this supplier.

- o Percentage of Total Articles:
  This is the percentage of all articles where this supplier is marked as preferred.

This view also can be exported to Excel using the button "Export to Excel" in this screen.

Purchase History: This function allows to load the purchase data for the listed articles in a defined time range. These figures could be used to estimate the expected quantities.

This dialog offers three main functions:
- o Get New Purchase History Data
  Here the user can define which data should be considered:
  - ▪ Time Period From/To:
    The system will calculate all deliveries from **all** suppliers in the defined time period.
  - ▪ Price Method
    Defines the price to be used for the PP (Past Period) calculations.
    "Last Price" will be the absolute last price.
    "Average Price" will result in the average price of all deliveries in the defined period.

  In addition to this the absolute last supplier can be displayed as well by marking the checkbox "Show Last Supplier". In this case and option "Last Price" is selected, the system will use the last price from this supplier.
  Based on the selected price type also the column description is changed:
  - • Last Pr. PP: Last Price of previous period
  - • AVE Pr. PP: Average Price of previous period

- o Use Saved Purchase History Data
  Previously loaded Purchase History can be reactivated and displayed again.

- o Hide Purchase History
  In case of a previously loaded Purchase History this option can be used to hide it on the screens. It still will be saved with the Purchase Bid and can be reactivated afterwards.

All changes will be recorded in the Bid Header Log. The user could add optional free text information for explanation.
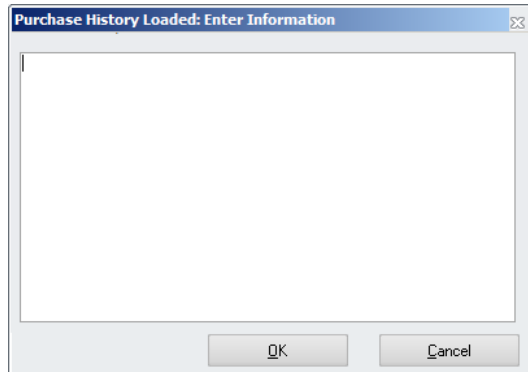
NOTE 1: If the purchase history was loaded before creating the export files, these quantities will also be exported! This information is required for the supplier to calculate the prices.

NOTE 2: Once the purchase History is loaded, there are several more fields visible on the Excel Export.

Product Specification: Activate this checkbox to display the first 30 characters of the content of Article Master Data > Product Specification.

Article Assessment Results: Activate this checkbox to display the existing Article Assessments results for the supplier's sample in an additional column per supplier/article..

Additional Functions:
There are several functions available directly in the grid.

- Click in the column "Pos": Here the user can manually adjust the position number of an article within the list. After editing use the "Save" function to re-sort the list.
- If Purchase History is loaded:
  - o Click in QTY PP: Here the user could adjust the loaded figure calculated from the purchase history. At saving the following dialog is displayed:
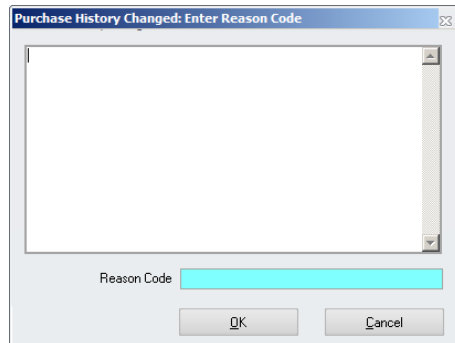
Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

o Click in AVE Pr. PP: Here the user could adjust the price calculated by the system. At saving the following dialog is displayed:

Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
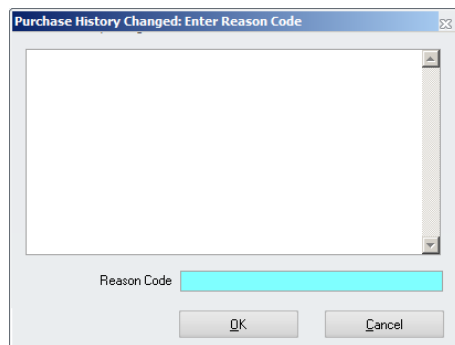(See chapter Reason Codes)

o Click in PP Supplier: Here the user could replace the last Supplier. At saving the following dialog is displayed:

Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

- Double click on any field will open the following dialog:

This screen shows the prices for the selected article per supplier for Base Unit and Unit. If already one supplier is marked as preferred the prices will be shown in green. The following functions are available in this screen.

- o Click into the field showing the unit price:
  Here the user could manually change the price for the packing unit.

- o Double click on any price field:
  This allows the user to change the preferred supplier for this position. The following dialog is shown:
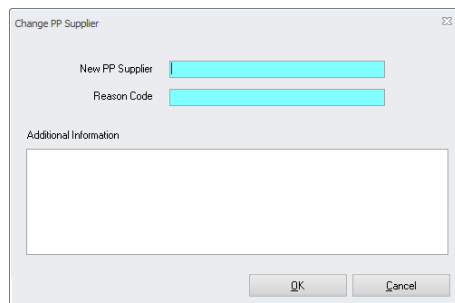

Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.

Depending on the configuration [BidManagement] > TendCodeMand it may be required that also the Tendering Code must be selected:

(See chapter Reason Codes).

Evaluation in Base Units – Excel Export

The following chapter will explain the Excel export from the tab "Evaluation in Base Units".

Depending on used functions and activated configuration parameters the layout of the file may change.

Export Path Definition:

➢ Activation: Configuration [BidManagement] > BidXlsExp_Path

Here a default export path can be defined. This is valid for all users.

If this path is accessible, the system will not ask for the export destination, but create the file at the defined location directly.
If the path is not accessible or not defined, the system will show the usual dialog where the user could select the destination folder and also could adjust the file name.

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014

Page 30 of 75
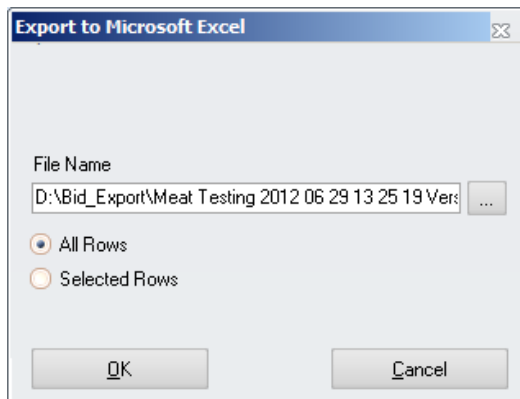
NOTE: Please make sure that all users have sufficient rights to access this directory as well as reading <u>and</u> writing (creation of files) must be allowed!

Export File Naming:

➢ Activation: None

By default the system will create the name of the export file as follows:
{Bid_name} YYYY MM TT HH MM SS Version nnn.XLS

{Bid_name}	*> shows the name of the Bid Sheet*
YYYY	*> shows the current year*
MM	*> shows the current month*
DD	*> shows the current day*
HH	*> shows the current hour (24h)*
MM	*> shows the current minute*
SS	*> shows the current second*
Version	*> shows the term "Version"*
nnn	*> shows the current sequential version number (please see below!)*
.XLS	*> default file extension*

Example:
Meat Testing 2012 06 29 13 19 37 Version 33.XLS

If there is no default path defined or the defined one is not accessible, the system will show the usual dialog where the user could select the destination folder and also could adjust the file name.

Export File Deletion:

➢ Available until version 8.10.40.1528 and older only!
➢ Activation: None

After creation of an export the application will try to delete the previous export file.

To find the file the system will simply use the name of the current export file and the look for the current counter -1.

In case the file cannot be found or cannot be deleted (access violation, missing rights, etc. …) the following message will be shown:

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 31 of 75

Materials Control - 8.7.20.21.1412

Previous Version cannot be deleted! Not possible to delete the file: D:\Program Files\MC 720\Export\Meat Testing 2012 06 27 13 32 07 Version 7.xls

OK
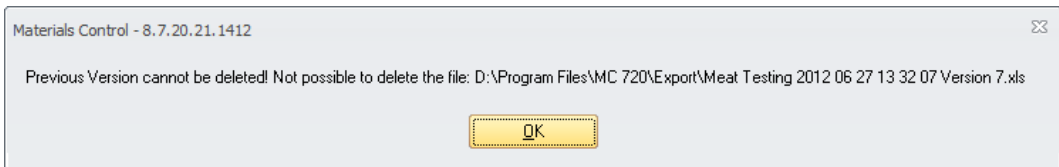
NOTE: This function will not be available anymore in version 9.00.xx and higher. It must not be possible to delete local files from a browser application!

Field Formatting:

➢ Activation: Configuration parameters in section [BidManagement].

The following will allow to define the number of decimals for quantities and monetary values in the Excel export sheet.
NOTE: This will not affect the decimals shown in the application on screen!

Format for monetary values:

Option: Change Configuration Settings

Configurations File	fbv8.ini
Section	BIDMANAGEMENT
Item	PRICE_FORMAT
Value	T2
Information	Definition of currency display and number of decimals for Price fields in Excel Export from Bid Management. Syntax Tn where shows currency symbol and n defines decimals.

OK   Cancel

This parameter allows to define…
➢ … if the system currency symbol should be shown.
 To activate this, define a "T" at the beginning. The application will now look for the system currency definition and add this as a suffix to the value.

➢ … how many decimals should be shown

Above configuration "T2" will show the figures like this:

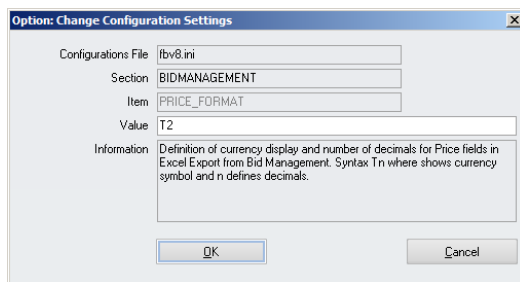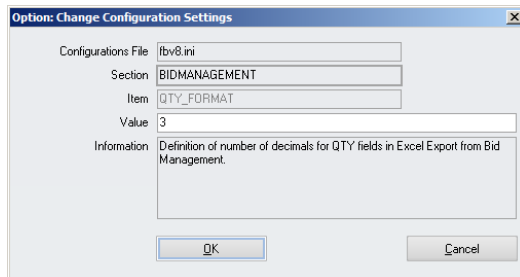|	A	B	C	D	E	F	
1	Purchase Bid Meat Testing						
2		Date: 02.07.2012 13:09					
3				Period: 01.01.2012-31.01.2012			
4	Pos	Article	Unit	QTY PP	AVE Pr. PP	Total PP	PP Supplie
5							
6	1	Beef Fillet kg	Kilogram	0,000	20,00 €	0,00 €	Mr Drink
7	2	Beef Rib Eye Steaks	Kilogram	0,000	6,18 €	0,00 €	US Supplie
8	3	Beef Tournedos 180gr	Kilogram	9,540	39,00 €	372,06 €	Beef & Sea
9	4	Lamb Saussages Ea	Each	0,000	0,15 €	0,00 €	
10	5	Lamb, Chops	Kilogram	0,000	3,99 €	0,00 €	Beef & Sea
11	6	Lamb, Fillet	Kilogram	0,000	8,89 €	0,00 €	Beef & Sea
12	7	Lamb, Rack	Kilogram	0,000	8,99 €	0,00 €	Beef & Sea
13	8	Lamb, ea	Kilogram	0,000	3,00 €	0,00 €	Beef & Sea
14	9	RAMETTE DE PAPIER A4 QUALITE B SUP 80 grs (RAME DE 500)	Each	0,000	3,02 €	0,00 €	
15							
16		TOTAL				372,06 €	
17		Percentage of Total Articles:					
18							

If nothing is defined here, the system will not show any symbol and follow the general settings done for price formats.

Format for quantities:

This parameter allows to define the number of decimals to be used for quantities.

	A	B	C	D	E	F	
1		Purchase Bid Meat Testing					
2		Date: 02.07.2012 13:09					
3				Period: 01.01.2012-31.01.2012			
4	Pos	Article	Unit	QTY PP	AVE Pr. PP	Total PP	PP Supplie
5							
6	1	Beef Fillet kg	Kilogram	0,000	20,00 €	0,00 €	Mr Drink
7	2	Beef Rib Eye Steaks	Kilogram	0,000	6,18 €	0,00 €	US Supplie
8	3	Beef Tournedos 180gr	Kilogram	9,540	39,00 €	372,06 €	Beef & Sea
9	4	Lamb Saussages Ea	Each	0,000	0,15 €	0,00 €	
10	5	Lamb, Chops	Kilogram	0,000	3,99 €	0,00 €	Beef & Sea
11	6	Lamb, Fillet	Kilogram	0,000	8,89 €	0,00 €	Beef & Sea
12	7	Lamb, Rack	Kilogram	0,000	8,99 €	0,00 €	Beef & Sea
13	8	Lamb, ea	Kilogram	0,000	3,00 €	0,00 €	Beef & Sea
14	9	RAMETTE DE PAPIER A4 QUALITE B SUP 80 grs (RAME DE 500)	Each	0,000	3,02 €	0,00 €	
15							
16		TOTAL				372,06 €	
17		Percentage of Total Articles:					
18							

If nothing is defined here, the application will show three decimals per default.

Supplier Contract Information:

➢ Activation: Purchase History must be loaded into the Bid Sheet.

f. Pr. Total	Pref. Supplier	Price Beef & Sea	Tot. Beef & Sea	Assm.	Price Beef Express	Tot. Beef Express	Assm.	Price Dix
		Supplier Assm.	2,138		Supplier Assm.	2,078		
18.995,00	Beef & Sea (2,138)	37,99	18.995,00		0,00	0,00		
1.094,02	Beef Express (2,078)	10,83	2.243,98		5,28	1.094,02		
0,00	Beef & Sea (2,138)	41,06	41,06	1,1	41,22	41,22	1,2	
0,00	Beef & Sea (2,138)	1,36	0,00		0,90	0,00		
640,00	Beef & Sea (2,138)	32,00	640,00	1,49	34,20	684,00	1,69	
213,62	Beef Express (2,078)	12,01	86,47		29,67	213,62		
135.648,00	Beef & Sea (2,138)	32,00	135.648,00		33,00	139.887,00		
909,44	Beef & Sea (2,138)	9,28	909,44		9,80	960,40		
157.500,08		176,53	158.563,95		154,07	142.880,26		
		100,00%	87,50%		87,50%	75,00%		

Discounts/Payback			Discounts/Payback			Discounts
Sconto/Days	1,20%/30 Days		Sconto/Days	0,00%/ Days		Sconto/Da
0,00 to 10.000,00	1,50%		0,00 to			0,00 to
10.001,00 to 20.000,00	2,00%		to			to
20.001,00 to 30.000,00	2,50%		to			to
30.001,00 to 40.000,00	3,00%		to			to
40.001,00 to 50.000,00	3,50%		to			to

At the bottom of each supplier column set the system now shows the Sconto and Volume Discount Information stored in the Supplier setup:
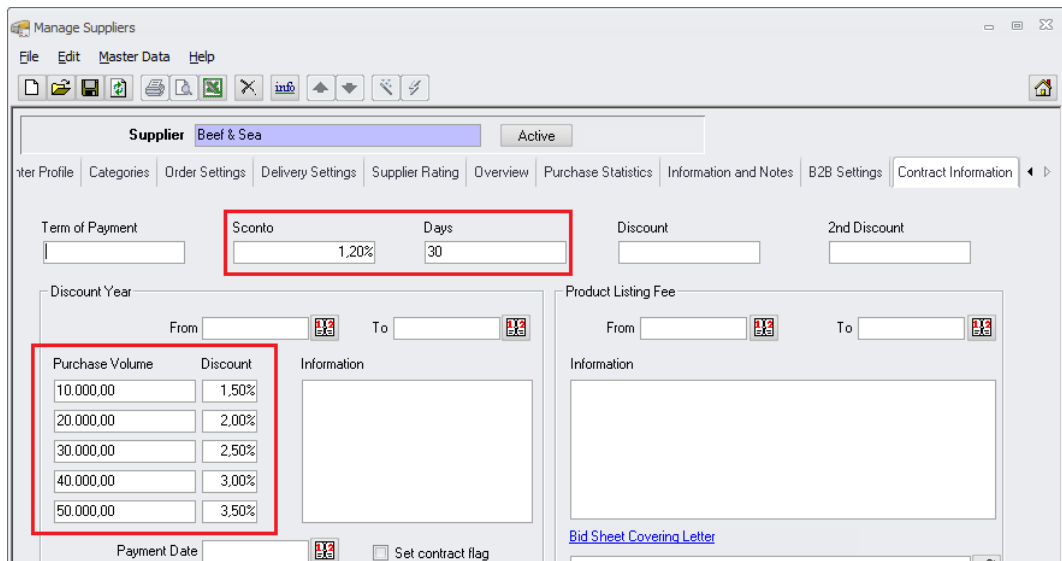
Bid Sheet Summary:

➢ Activation: Purchase History must be loaded into the Bid Sheet.
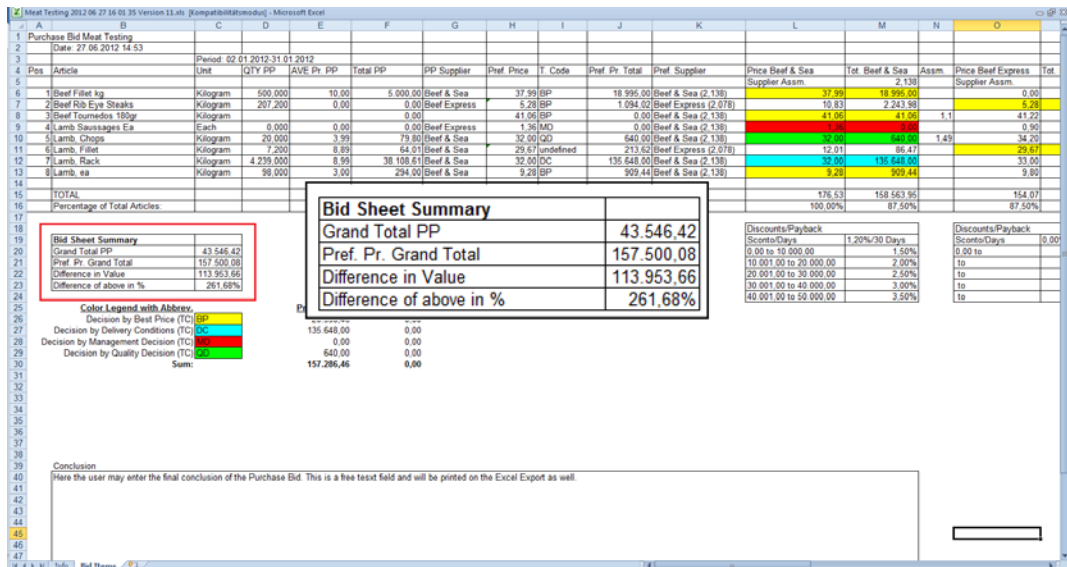
On the left side, just under the main article grid, the system will show the summary for this Bid Sheet.

Here the following figures are compared:
- Grand Total PP
  This is the total sum of the purchase based on the loaded (and maybe edited) Purchase History.
- Pref. Pr. Grand Total
  This figure shows the total sum of the selected prices multiplied with the expected QTYs based on the loaded (and maybe edited) Purchase History.
- Difference in Value
  This field shows the difference between the two above shown values.
- Difference of above in %

Tendering Code Legend & Summary:

➢ Activation: Purchase History must be loaded into the Bid Sheet.

On the left side, just under the Bid Sheet Summary, the system will show a color legend and a summary per used Tendering Code.

Bid Sheet Conclusion:

➢ Activation: None. This field will always be exported.

At the bottom of the sheet the system now will display the content of the field "Conclusion" from the tab "Edit Bid Details":

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 35 of 75

Evaluation in Units

This tab is the main work area during the Purchase Bid processing.

The grid here shows all articles added on the previous tab including their currently used units from the module Price Quotes. On the right part of the screen the different prices per supplier per base unit and packing unit are displayed.
Also the functions to generate Price Quotes, Order Baskets and Assortments are located here.

Screen Details:

Toolbar:

New: Click here to create a new Purchase Bid. The system will then switch to the tab "Edit Bid Details".

Open: This icon will open the "Overview" tab.

Save: Click this icon to save the Purchase Bid in the current state. Depending on the last changes the system will ask for a text note and/or a reason code (partially mandatory!).

Print/Preview: These two functions will open a report selection box. From here the report "Evaluation in Units could be printed.

Excel: Export of current grid to MS Excel

Delete: Click here to delete the Purchase Bid.

Grid:
The first 4{5} columns are fixed and will always be displayed at the left side of the screen.

Article: Article Name

{Product Specification}: If activated: This column shows the first 30 characters of the content of Article Master Data > Product Specification.

Unit:	The application here shows all available packing units for the article. These are initially read from the current valid price quotes, but additional units could be added manually as well.

Pref. Price:	This column shows the preferred price. This will either be the cheapest (automatically selected) or a manually selected one.

Pref. Supplier:	This is the Supplier with the selected Price. In case that no manual selection and also no automatic selection are possible (identical prices) this column will be displayed as "Undefined".

Following the fixed area now two columns per supplier are displayed:

{Supplier Name} BU Price:	This column shows the price recalculated in Base Unit. This is useful if the suppliers transmitted pricings for different packing units. Example: Supplier A offers € 3,06 per 180 grams Supplier B offers € 62,96 per 20 x 180 grams Here only the price in Base unit will show comparable prices for the user (€ 17,00 vs. € 17,49).

{Supplier Name} Unit Price:	This column will show the price per packing unit.

Preferred Prices are shown in the cells marked green. If you have not chosen any other preferred price manually the system will select the lowest price in BU automatically.
In case of identical prices in base units the system will show these prices in red filled cells (see record no. 4 in screen shot above).

At the bottom of the grid some totals for some columns are displayed:

Pref. Price:	This is the total sum of all preferred prices.

{Supplier Name} BU Price:

Total:	Here the sum of all prices in BU for this supplier is displayed. This value allows the comparison of the suppliers if more than one of them could offer all prices.
Percentage of Total Articles:	This figure shows the percentage value of the prices given by this supplier. It will show i.e. 100% if the supplier has given prices for all positions.

## Buttons/Flags:

Reset to Proposal: This function will undo all eventually manually done selections of the preferred supplier and will select the cheapest supplier for all positions. The following dialog is shown:
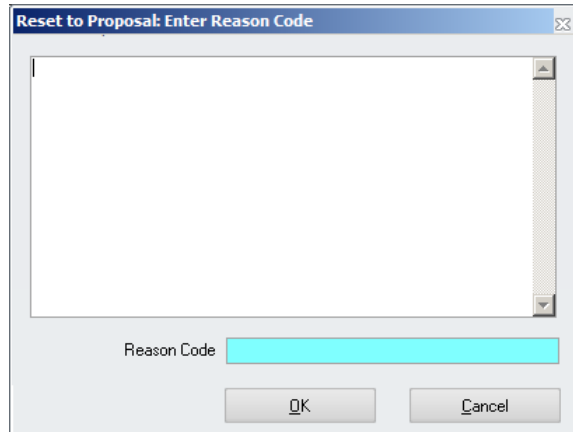
Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

Accept Quotes: This function allows to create price quotes out of the listed prices.
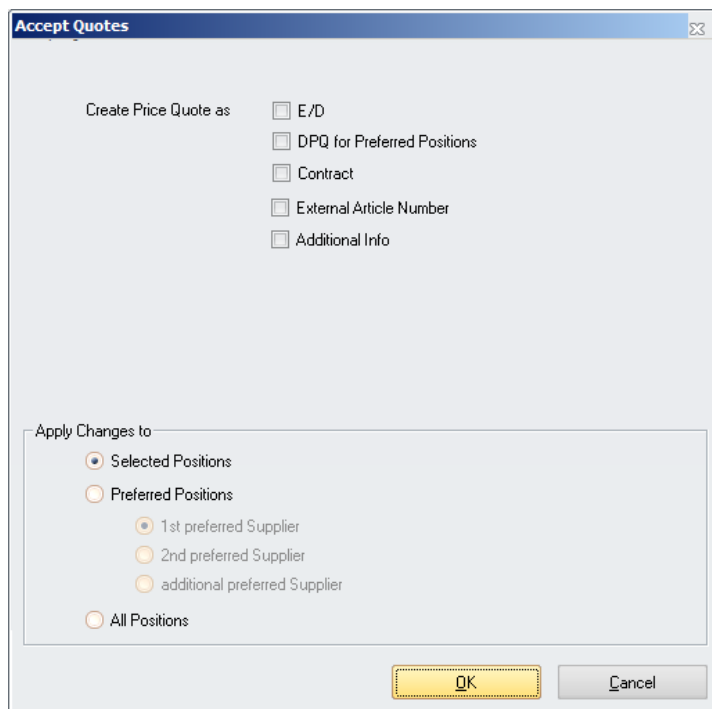
In the upper section of the dialog the user could select the Price Quote parameters, in the lower section the user must select for which records the quotes should be created.

The system will use the price behaviour defined in the source article mast data records:
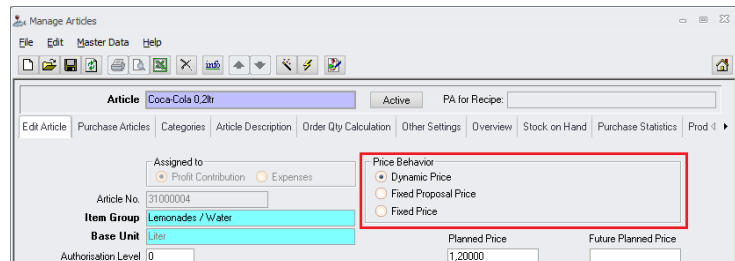
If the article was defined to use dynamic prices, the price quotes will be created with this definition as well.

Example:

It is possible to have a DPQ for Carrots in KG and another DPQ for Carrots in Case/5KG.
For all records to be considered based on selection in "Apply Changes to" during creation of the price quotes…
… System will set E/D if checkbox marked.
… System will set Contract if checkbox marked.
… System will set DPQ if checkbox marked and if record is defined as "Preferred" in Bid Sheet.
… for all positions not defined as Preferred, no DPQ will be set.

For all records from above result set which are preferred in the Bid Sheet the system will search in the Price Quotes and remove eventually existing DPQ flags where combination [Article + Packing Unit] is exactly the same.

As a result of this e.g. the DPQ for Carrots in Case/5Kg could have been updated to the new supplier from the Bid Sheet, but the DPQ for Carrots in KG from other supplier remains, if there is no new DPQ from Bid sheet for Carrots/KG.

In case of no new DPQ from the Purchase Bid the system will keep the origin DPQ.

The application will use the Purchase Bid Period definitions for the price quotes if the system is configured to use the Future Price Quotes functionality (see documentation "132_MC_Future_Price_Quotes").

Here also the import of the External Article Number and the Information could be enabled.

Remove Supplier: This function could be used if a supplier should be removed from this Purchase Bid. Mark a supplier column and click on the button "Remove Supplier":
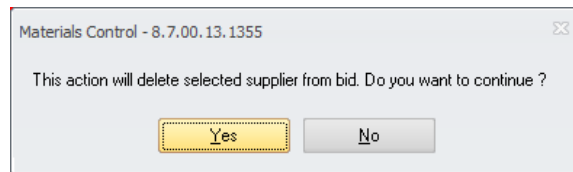
After confirmation with "Yes" the system will ask for the reason:
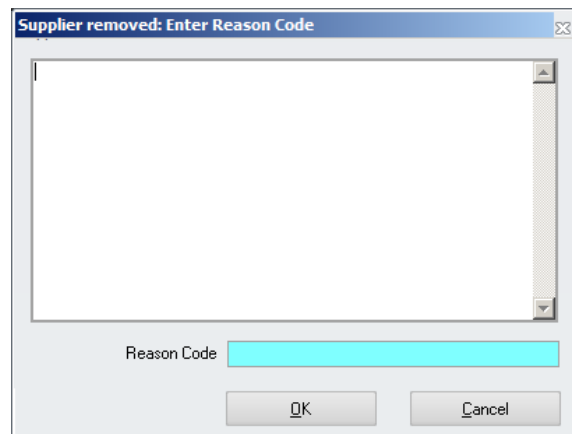
Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

Summary:

Click this button to view the summary with units of the current bid:

Here the system lists all articles and their prices from each supplier.
Fields marked in yellow designate that this price is selected as preferred Bid.
Fields marked in red show that no price has been selected as preferred Bid.
At the bottom of the grid the system shows two total figures per column:
- TOTAL:
  This is the Total Sum of the prices marked as preferred from this supplier.
- Percentage of Total Articles:

This is the percentage of all articles where this supplier is marked as preferred.
This view can also be exported to Excel using the button "Export to Excel" in this screen.

By double clicking into the supplier columns also here the prices can be edited and/or the preferred supplier could be changed. Same as in the main screen the system will ask for information and reason codes after changing the details.

Add Unit: Use this function to add a unit for a selected article. Mark the article and click on the button:
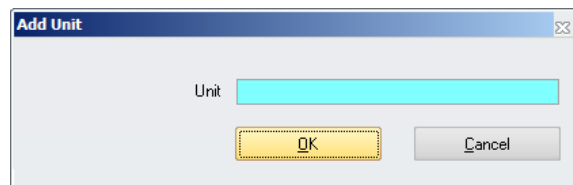
Select the new unit from the list and confirm with OK. The application will now insert a new row for this unit.

Create Article Assortment: This function allows to create an assortment out of the selected/all positions.

After selection of the positions and the cost center the application will ask for the assortment owner:

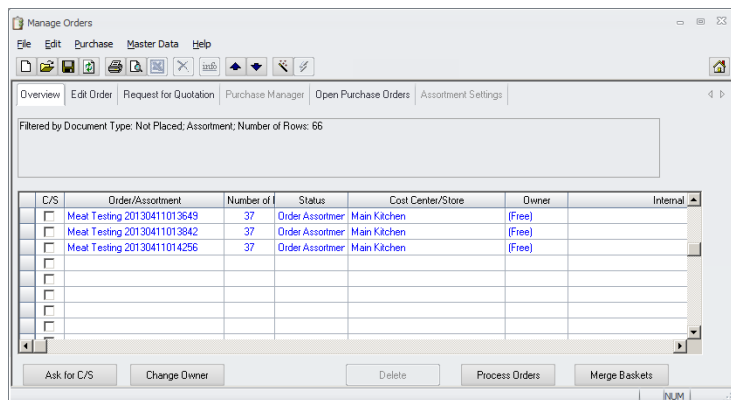Now the name of the Assortment must be defined:

This could be either a free definable name or a system generated by using the button [System No.].
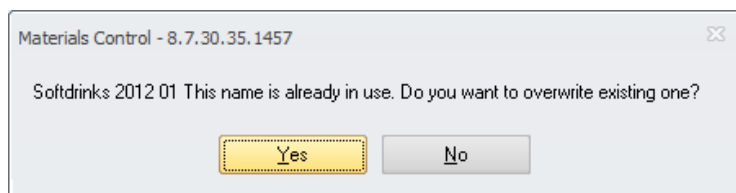
If no specific name was entered and the [System No.] function is used, the application will use the Bid Sheet name concatenated with YYYYMMDDHHMMSS

Example:
Meat Testing 20130411014256

Bid Sheet Name	Meat Testing
Year	2013
Month	04
Day	11
Hour (12h)	01
Minutes	42
Seconds	56

… This assortment was saved on April 11th 2013 at 13:42:56.

If the assortment name was entered manually and there is already one named exactly the same, the system will show the following message:

   o   Yes: The system will overwrite the existing
        assortment with the new one.

Document title
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
                    Page 42 of 75

Bid Management

o   No: The system will close this message box and return to the Assortment Name dialog.
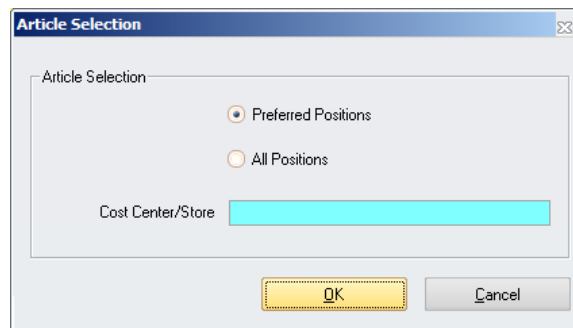
At the end the application will show the confirmation:

The new assortment now can be found in the Purchase Order module named as defined above.

Create Supplier Assortment: This function could be used to create assortments per Supplier out of the selected/all positions.
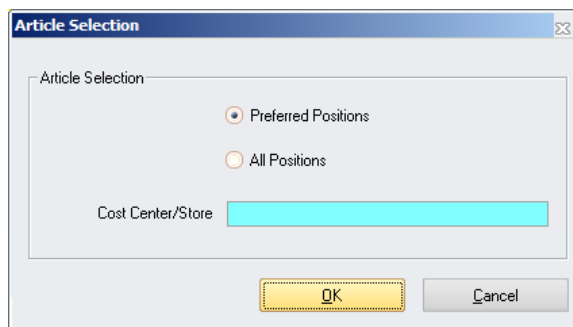
After selection of the positions and the cost center the application will ask for the assortment owner:
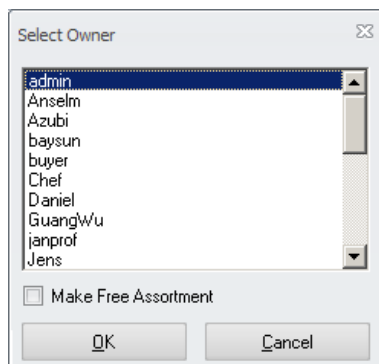
Now the name of the Assortment must be defined:
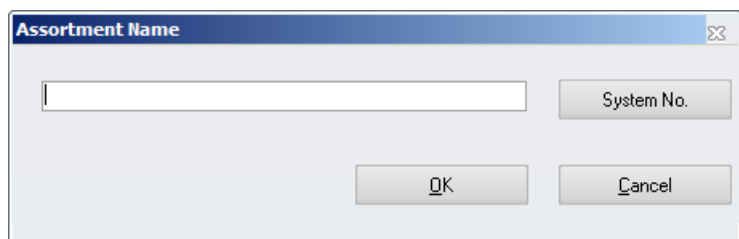
This could be either a free definable name or a system generated by using the button .

If no specific name was entered and the function is used, the application will use the Bid Sheet name concatenated with YYYYMMDDHHMMSS

Example:
Meat Testing 20130411014256
Bid Sheet Name   Meat Testing
Year   2013
Month   04
Day   11
Hour (12h)   01
Minutes   42
Seconds   56

… This assortment was saved on April 11th 2013 at 13:42:56.

If the assortment name was entered manually and there is already one named exactly the same, the system will show the following message:

- o   Yes: The system will overwrite the existing assortment with the new one.
- o   No: The system will close this message box and return to the Assortment Name dialog.

At the end the application will show the confirmation:

The new assortment now can be found in the Purchase Order module named as defined above.

Create order Basket: Use this function to create an Order Basket out of the Purchase Bid.

After selection of the positions and the cost center the application will confirm the creation of the basket:
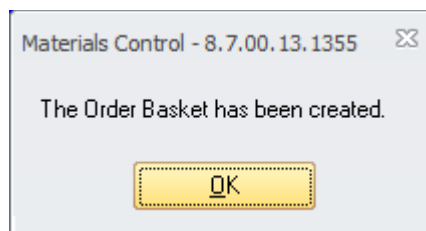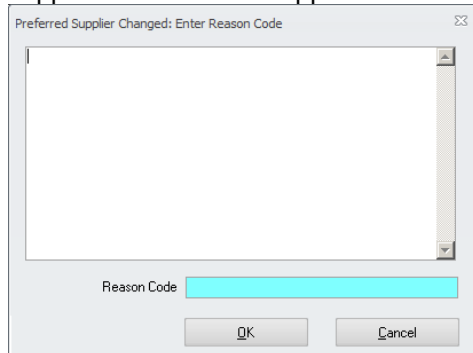
Product Specification: Activate this checkbox to display the first 30 characters of the content of Article Master Data > Product Specification.

Additional Functions:
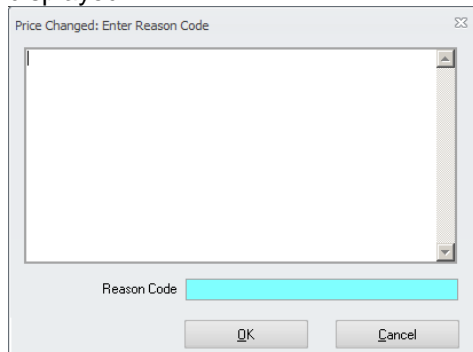
There are three functions available directly in the grid.

- Double click in the column "{Supplier Name} BU Price": This will define the selected supplier as Preferred Supplier.
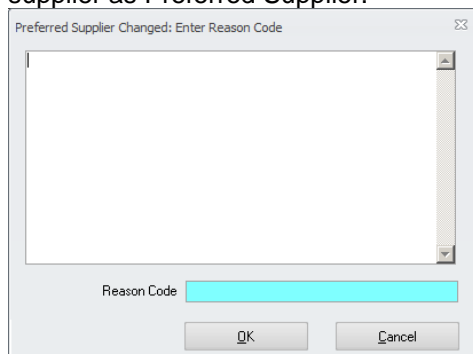
Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

- (single) Click in the column "{Supplier Name} Unit Price": Here the user could enter the price manually or adjust the imported ones. At saving the following dialog is displayed:

Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes)

- Double click in the column "{Supplier Name} Unit Price": This will define the selected supplier as Preferred Supplier.

Here the user **must** enter a free text information and **must** also select a reason code. Both fields are mandatory! This change will be recorded in the Bid Detail Log.
(See chapter Reason Codes).

Import/Export

This tab offers the functions to export the Purchase Bid to the suppliers and to import the edited lists again.
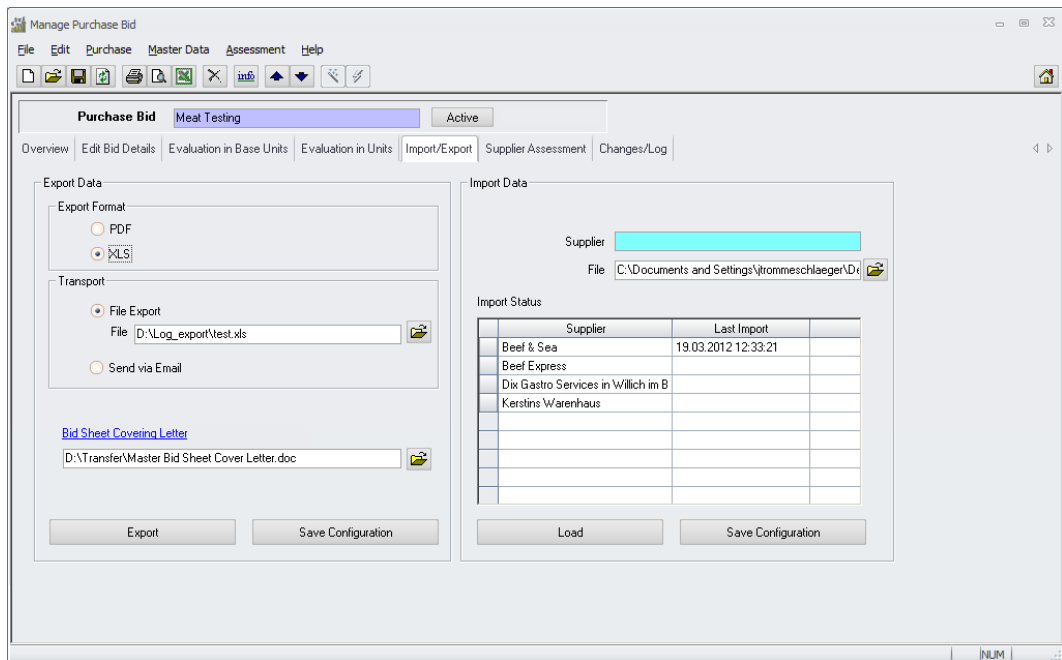
The left side of the screen shows all functions & features related to the export; the right side offers the import function.

Export Data:

This function should be used to create the price lists to be sent to the suppliers.

Export Format:
-   PDF   Select this option to generate the Purchase Bid lists as PDF files. Please keep in mind that such files cannot be edited and as a result of this no automated import is possible. The prices returned by the supplier then must be entered manually.

-   XLS   Select this option to generate the Purchase Bid lists as Excel sheet. This Excel sheet contains two tabs, one cover page and a detail page.
                               The cover page contains general information:
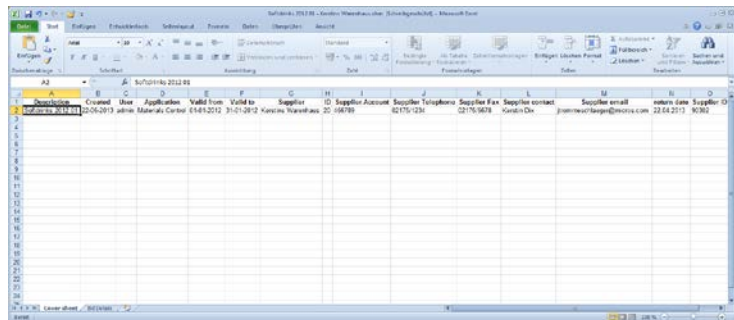
Description	Bid Sheet Name
Created	Creation Date of the Export File
User	User Name (at creation of the export)
Application	Always "Materials Control"
Valid from	Start Date for Bid Sheet Pricing
Valid to	End Date for Bid Sheet Pricing
Supplier	Supplier for this Export Sheet
ID	internal ID
Supplier Account	Account Number for this Supplier
Supplier Telephone	Phone Number for this Supplier
Supplier Fax	Fax Number for this Supplier
Supplier Contact	Contact Name for this Supplier
Supplier Email	Email Address for this Supplier
Return Date	Expected Return Date for the Supplier Prices
Supplier ID	Internal Supplier ID

All data here is read-only.

Detail Page:
The supplier could enter his prices directly into this template and return it to the sender. These files can be imported directly into the Purchase Bid.
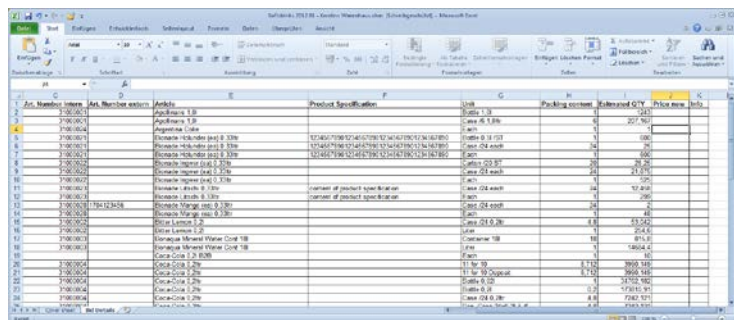
Column explanation for the Excel Export:

A & B
- o   These columns are hidden since they are used internally only

C / Art. Number intern
- o   Here the internal article number is shown.

D / Art. Number extern
- o Here the external article number (Purchase Article / Price Quote) is shown. This column is editable for the supplier.

E / Article
- o Here the article name is shown.

F / Product Specification
- o If activated the first 30 characters of the Product Specification (from Article Setup) are shown here.

G / Unit
- o This is the name of the Packing Unit.

H / Packing Content
- o This is the QTY in Base Unit contained in the Packing Unit.

I / Estimated QTY
- o This is the estimated QTY based on the loaded Purchase History. If no PH was loaded the column will show 0 for all positions.

J / Price new
- o Here the supplier should enter his price offer for the article. This column is editable for the supplier.

K / Info
- o Information. Here the supplier could enter some details regarding his price for this position. This information will be imported into the bid sheet and into the price quote created out of this bid.

NOTE: All columns are write-protected by default (see [BIDMANAGEMENT] > EvalBUnitExp_RO). The supplier should/can insert his specific article numbers (column D) and his prices (column J) for the existing records only!
This write-protection could be secured with a password. Go to System > Configuration > FBV8.INI > [BIDMANAGEMENT] > PW_EXPORTFILE:
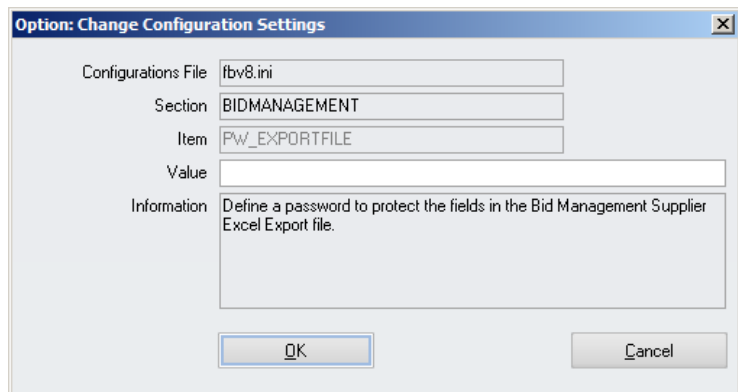
If blank: The protection could be removed via (MS Excel) "Review" > "Unprotect Sheet". But then the import could fail if the supplier has done any changes in the layout.

Is any password is entered: MS Excel will ask for the password to unprotect the exported sheet.

Depending on the settings System > Configuration > FBV8.INI > [NAMES] > XLSVERSION the application will export in XLS (Office 97-2003) or XLSM (Office 2007 and higher) format.

Transport:
- File Export   This option will create the export file at a defined location (see below "File:").
   o File: Define the location for the file export (if option "File Format" was selected).
                    In this case the system will use the defined file name and concatenate it with the supplier name.
                    Example:
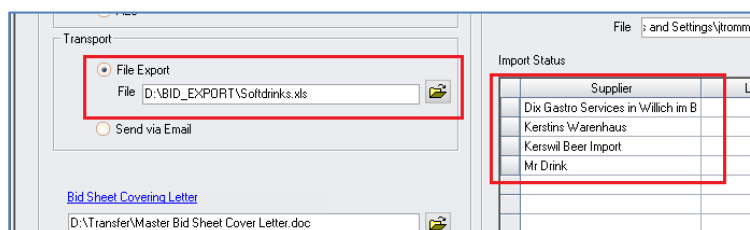
The file to be export is defined as D:\BID_EXPORT\Softdrinks.xls.

At Export the application creates the files at the defined location using the defined file name and the supplier names:
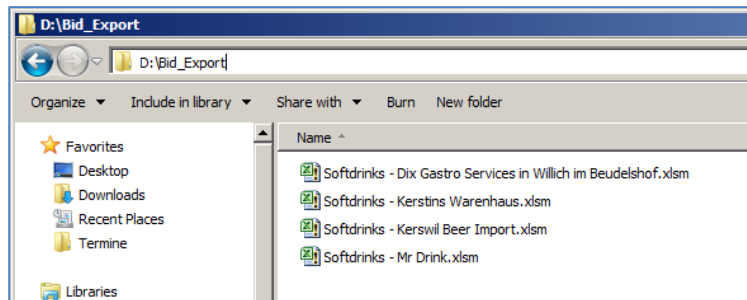
- Send via Email   Using this option the export files will be transmitted via Email to the supplier.

The application now shows a screen to select either all or just selected suppliers for which the email should be sent:

In this case the application will combine the Bid Sheet Name and the supplier name:

Bid Sheet Covering Letter:

The system offers to send a cover letter together with the export file. This letter should contain, besides the salutation and information about the purchase bid, also some instructions how the export file should be used.
- Description of the columns
- No records must be added/removed
- No columns must be added/removed
- Edit the price column only
- Use correct punctuation (regional settings of sender!)

Here on the tab "Import/Export" the standard Cover Letter will be defined. This cover letter will be used for all Purchase Bid Exports via Email.

Browse to the document which should be defined for this and click on "Save Configuration" afterwards.

As exception also Cover Letters per supplier could be defined. Go to Master Data > Suppliers and select the supplier. Now switch to the last tab named as "Contract Information". Here the alternate Cover Letter for the selected supplier could be defined.
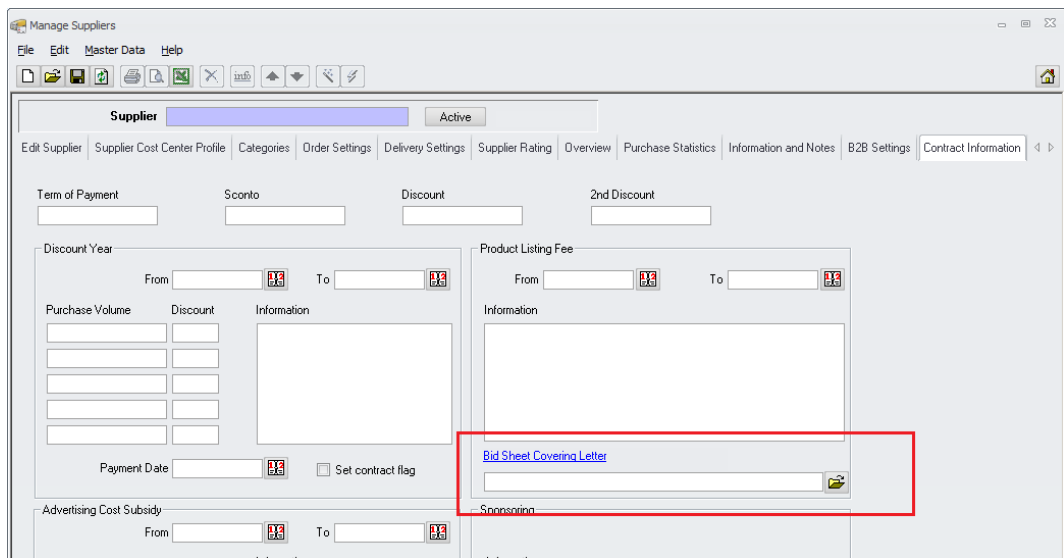
Export: This function will start the export based on the selected parameters. In case of Export via Email the system asks for (optional) information:
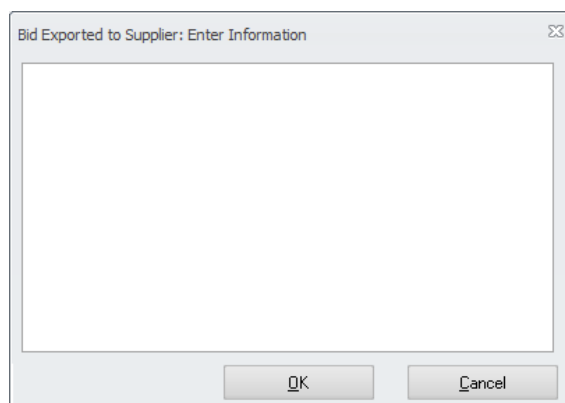
Save Configuration: This button can be used to save the file name and location as default values for this purchase bid.

Import Data:
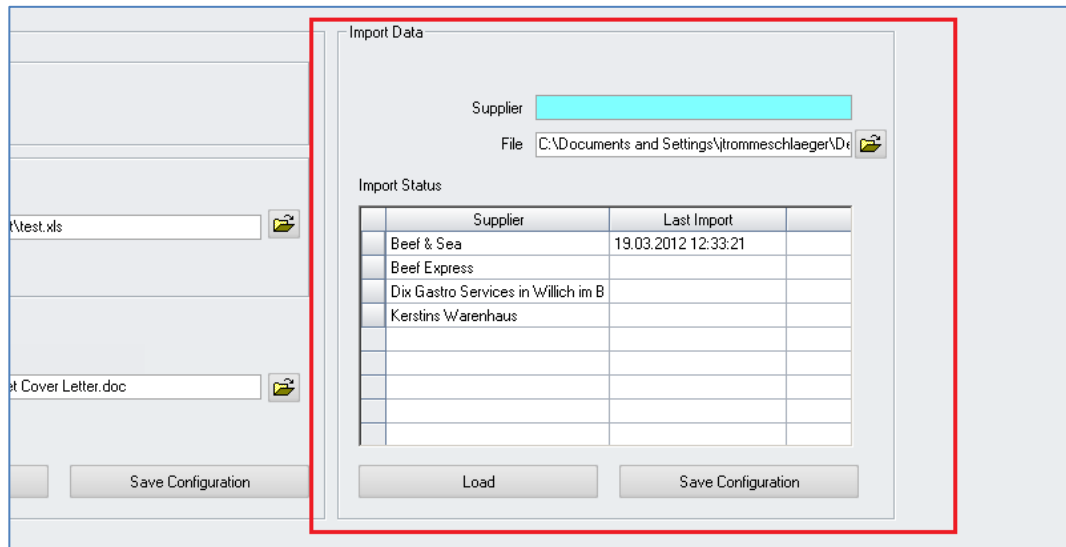
This function is used to import the previously exported EXCEL files after the suppliers have entered their prices.

The first field allows to select the supplier for which the prices should be imported:
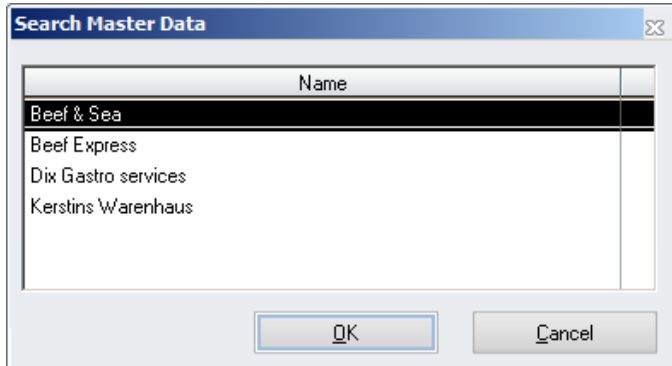
The import is done by supplier. In the next field the user must select the file he wants to import.

The table in the section "Import Status" shows the suppliers listed for this bid sheet and their import status. This allows to easily identify when the last import for a supplier was done and which ones are still outstanding.
Each time any further export for a supplier is done, the "Last Import" time stamp is cleared again.

Load: After selecting the supplier and the file this button will start the import. After importing the prices from the Excel sheet the system will ask for some (optional) information …
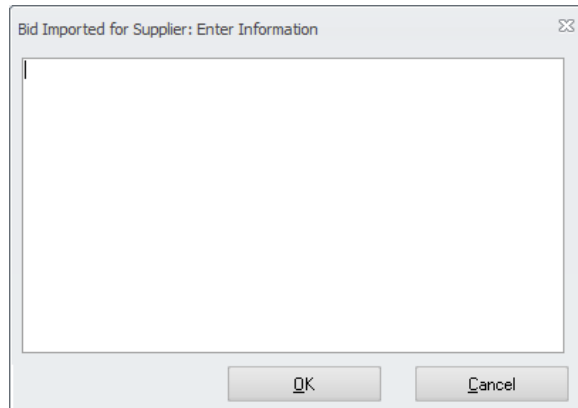
… and display a log file entry for this import:
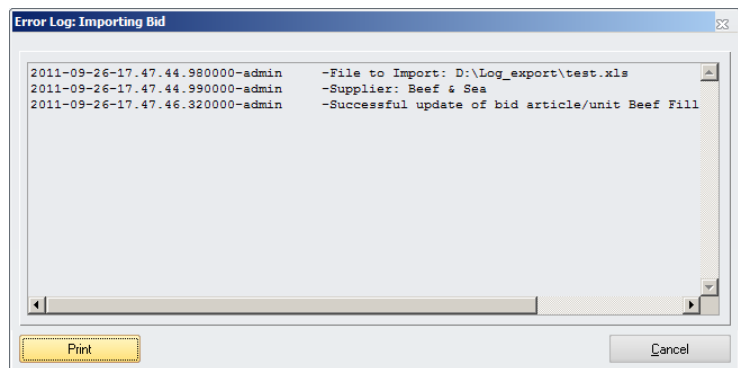
Save Configuration: This button can be used to save the file name and location as default values for this purchase bid.

All Exports and Imports will be logged in the Bid Sheet Header Log:
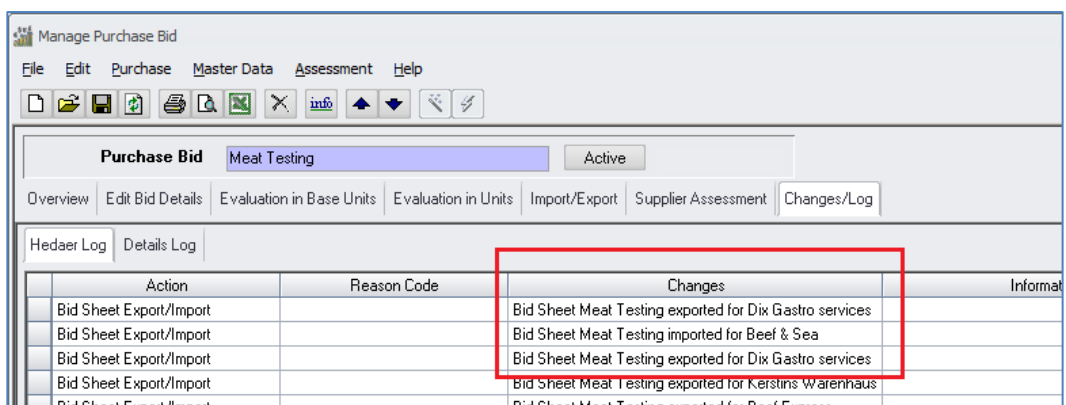
Supplier Assessment

This screen shows the latest Assessments for the Suppliers listed on the current Purchase Bid:

In the bottom line the average grades per criteria are displayed.

Changes/Log

Here all recorded changes are collected. This tab is divided into two sub tabs, one for changes related to the Purchase Bid Header (tab "Edit Details") and another one for the Purchase Bid Details (tabs "Evaluation in Base Unit/Unit").

Header Log:

The entries are listed sorted by ascending date. As in most of the other screens in Materials Control the sorting could be changed by double click the column headers.

Columns:

Action: This column shows the function where changes were made.

Reason Code: Here the selected Reason Code (when applicable) is displayed.

Changes: This is the detailed description of the changes made.

Information: This field shows the free text information entered by the user (when applicable).

Changed by/at: User Name and Date/Time Stamp of the action.

Print/Preview: This log could be printed.

Excel: The usual Excel Export function allows to export the displayed data.

Detail Log:

The entries are listed sorted by position number and date ascending. As in most of the other screens in Materials Control the sorting could be changed by double clicking on the column headers.

<u>Columns:</u>

Pos: Position Number of the article in the Purchase Bid.

Article: Article Name

Reason Code: Here the selected Reason Code (when applicable) is displayed.

Changes: This is the detailed description of the changes made.

Information: This field shows the free text information entered by the user (when applicable).

Changed by/at: User Name and Date/Time Stamp of the action.

Print/Preview: This log could be printed.
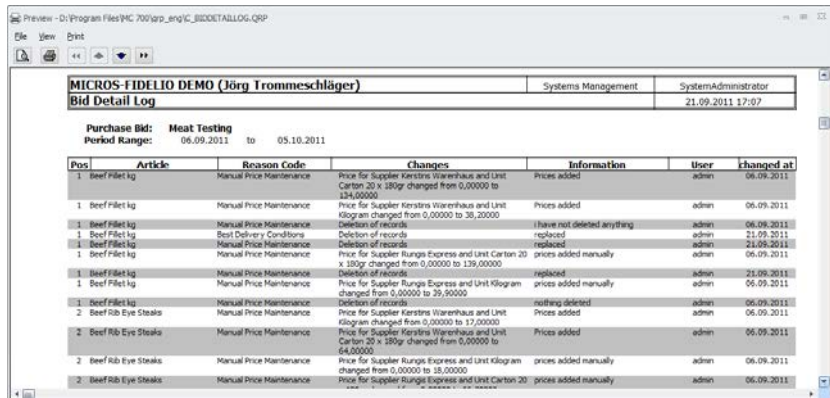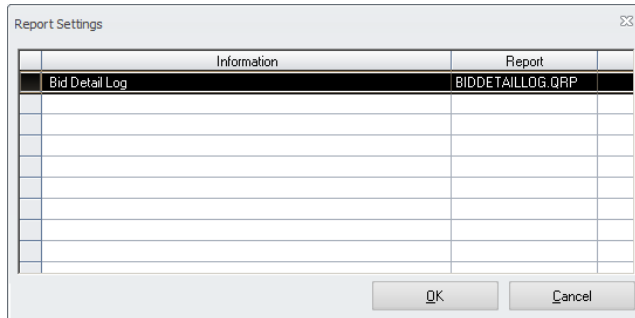
Excel: The usual Excel Export function allows to export the displayed data.

Supplier Assessment:

This function is located in the module Bid Management and could be used to assign grades or scores to the suppliers.

User Rights:

In order to access and use this module, two new user rights must be set:
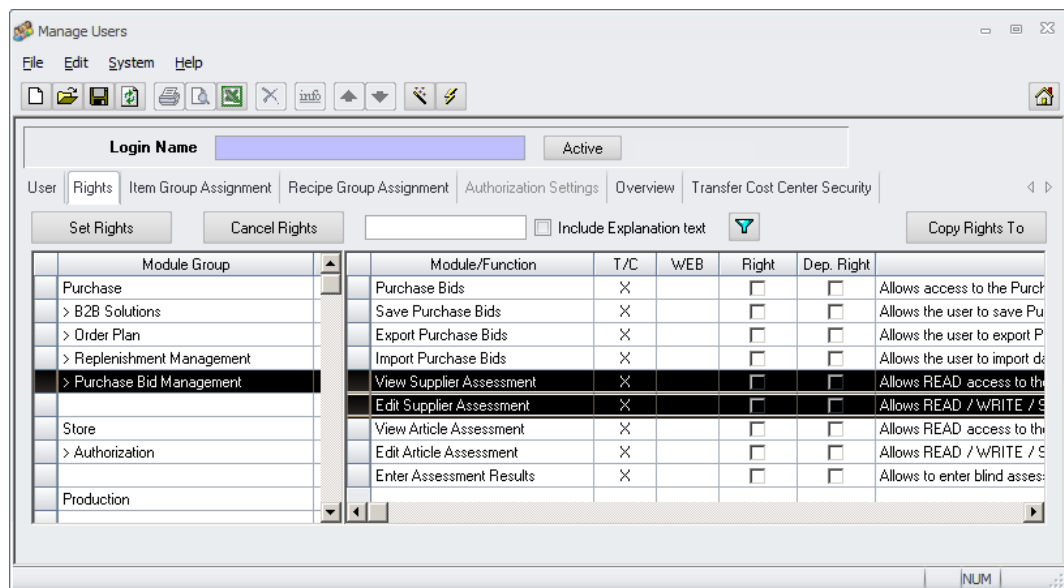
View Supplier Assessment: This right allows read-only access to this module. The user can view entered assessments, but no changes are possible.

Edit Supplier Assessment: The user can create new assessments and view and edit existing ones. Having this user right also assessments created by other users could be edited.

NOTE: The user must have the user rights "Purchase Bids" to access the main module in general, before he could start the Supplier Assessment!

Setup of Assessments:

This module could be used with or without the Bid Management. In order to activate this for the Bid Management as well please open System > Configuration > [CUSTOM]:

Here you can find the parameter SUPPLIERASSESSMENT.
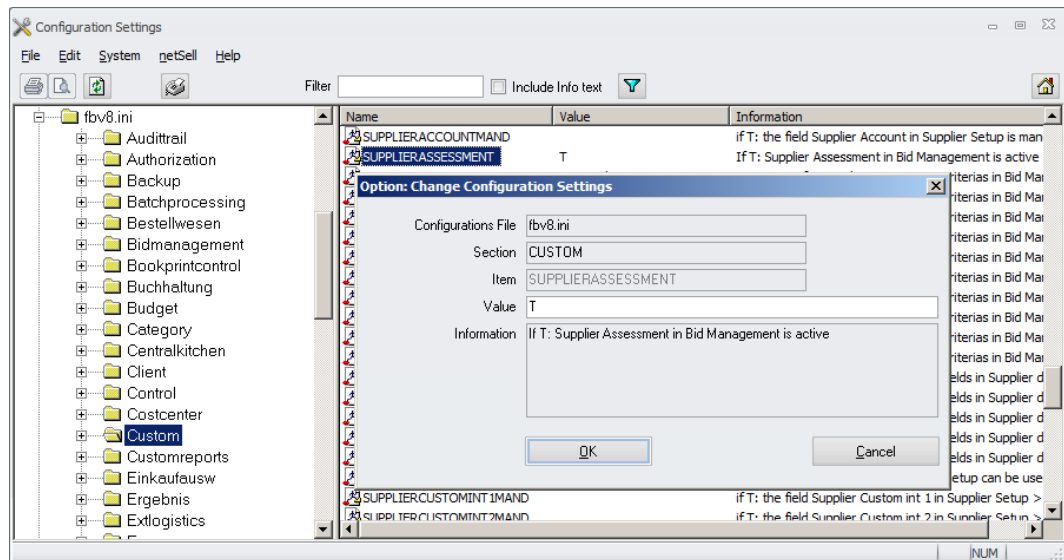
Set this parameter to T in order to activate the use of this module in the Bid Management.
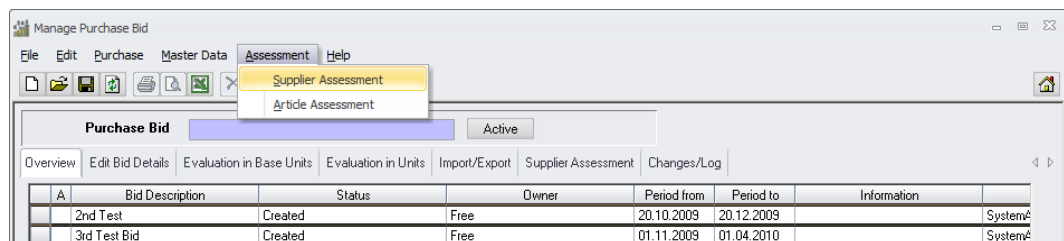
Start the module Bid Management and select from the main menu the section "Assessment". Here you can find the module "Supplier Assessment".

In the header section the supplier must be selected.
In the grid below the details of the assessment are displayed.

Select any supplier and click on "New Assessment":
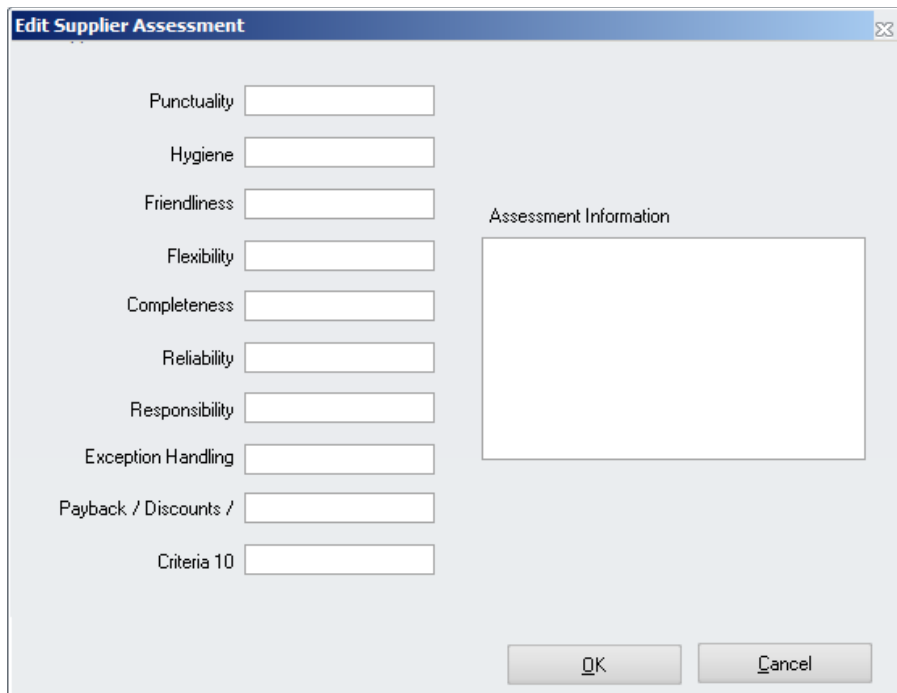
This dialog shows 10 fields where the different grades can be entered plus one additional free text information field for details about this assessment.

The labels for the 10 fields are free definable, but are valid for all supplier assessments.
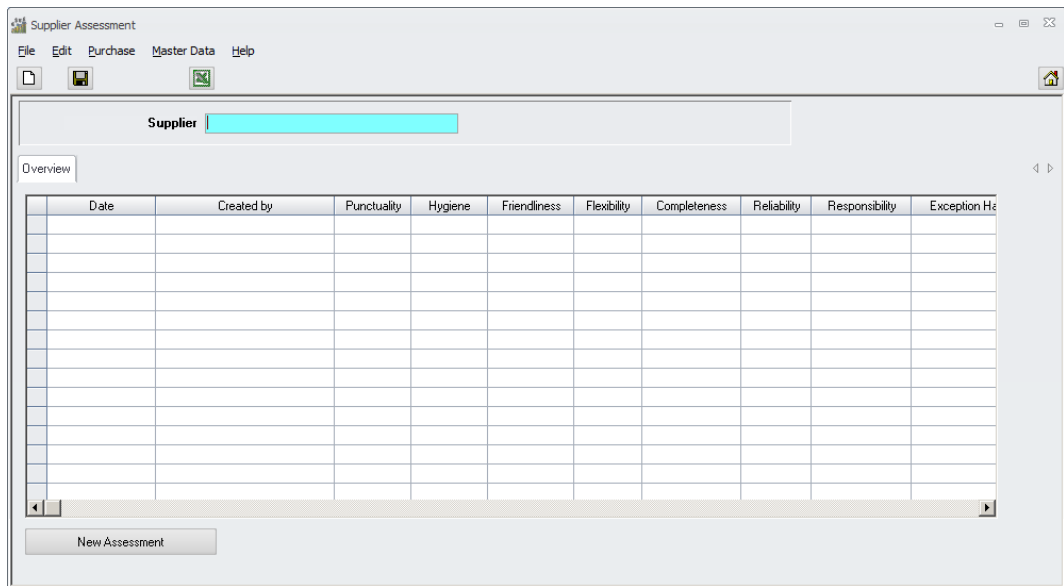They should show the criterias you want to use for the supplier assessments, such as…
- Punctuality (delivery on time as ordered)
- Hygiene (clean truck, clean cases, etc. …)
- Friendliness (the driver is friendly)
- Flexibility (emergency orders are possible)

- Completeness (deliveries are complete)
- etc. …

To define these labels please open System > Configuration > [CUSTOM]:
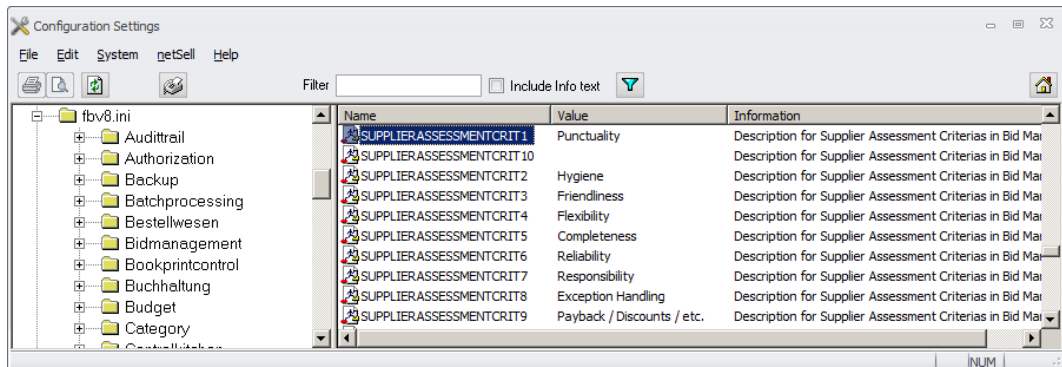
Here you can find the parameters SupplierAssessmentCrit 1 – 10:
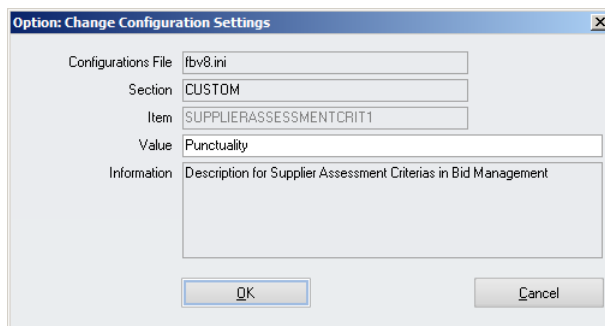
Enter the description for the criteria to be shown in the Assessment and click OK.
After defining the criterias please re-open the module Supplier Assessment.
Select a supplier and click again on "New Assessment":

Now you can enter the grades for each of the criterias. The grades are measured in numeric values with up to three decimals. Please keep in mind that lower grades are considered as good and higher grades are considered as negative.
Click OK once finished.

The grid now shows the following information:
- Date: The exact time stamp when the assessment was created.
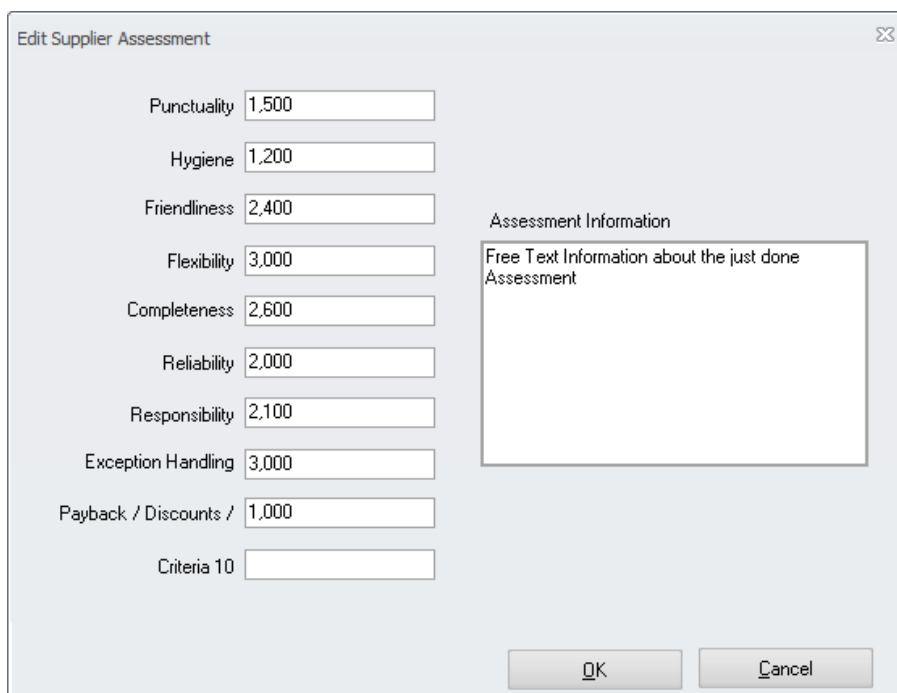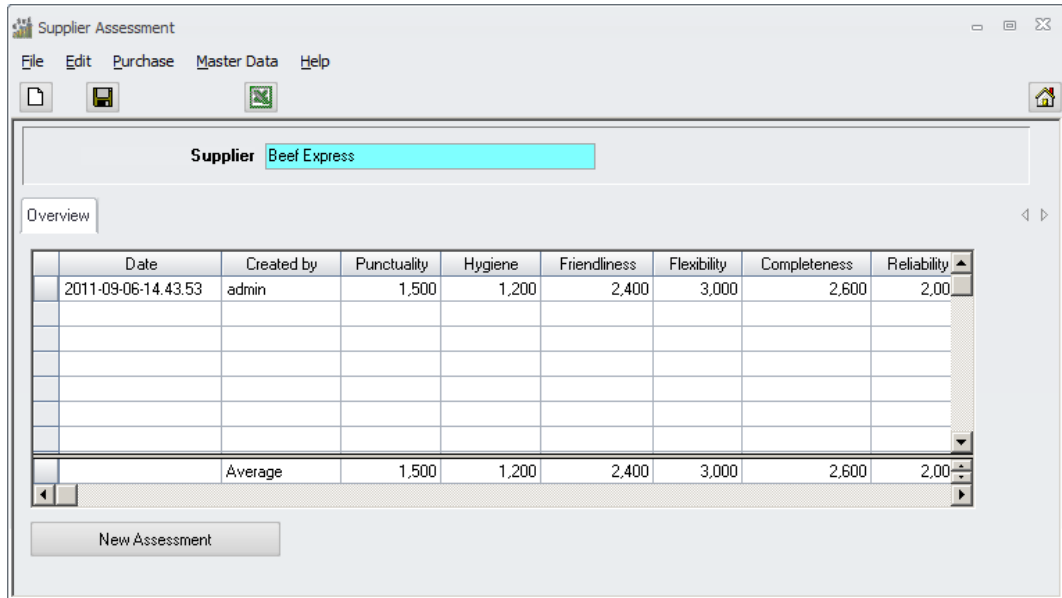- Created by: The user who has entered the assessment
- Criterias: Entered grades for the defined criterias
- Average: The average value of the entered criterias
                   NOTE: Do not enter 0 in case of no grade, as this will influence the
                   average calculation!
- Info: The text entered in the Assessment dialog
- Changed by: The user who has changed the assessment last
- At: The date of the last change.

The results of this assessment will be visible in the Bid Management screens (see previous chapters) and will help to select the right supplier for the quotes.

Article Assessment:

This module is designed to store assessments of articles and samples provided by the suppliers. Selected users can assign grades/scores for pre-defined criterias to the samples.

These assessments could be done as blind tests, meaning the testers do not have knowledge which supplier produced the sample.

The result of these assessments can be used in the Bid Management to select the best possible articles.

This module consists of mainly two parts:
- Setup of Article Assessments
- Entering results

The main workflow for such an Article Assessment will be like this:

- The purchase manager creates a new Article Assessment
    o Adding testers to the assessment
    o Adding supplier, units and prices

- Users having access to the system will select the article and print the blind test sheet.

- For users not having access to Materials Control the purchase manager should print the blind test sheets.

- The blind test takes place and all users should enter their results into the sheets.

- The results are entered into the system:
    o Users having system access will enter their results in Master Data > > Articles without being able to see the supplier information.
    o For users not having access to the system an authorized user must enter the results in the Article Assessment module in the Bid Management. (These users can see the supplier information.)

User Rights:

Three user rights are available for this module:
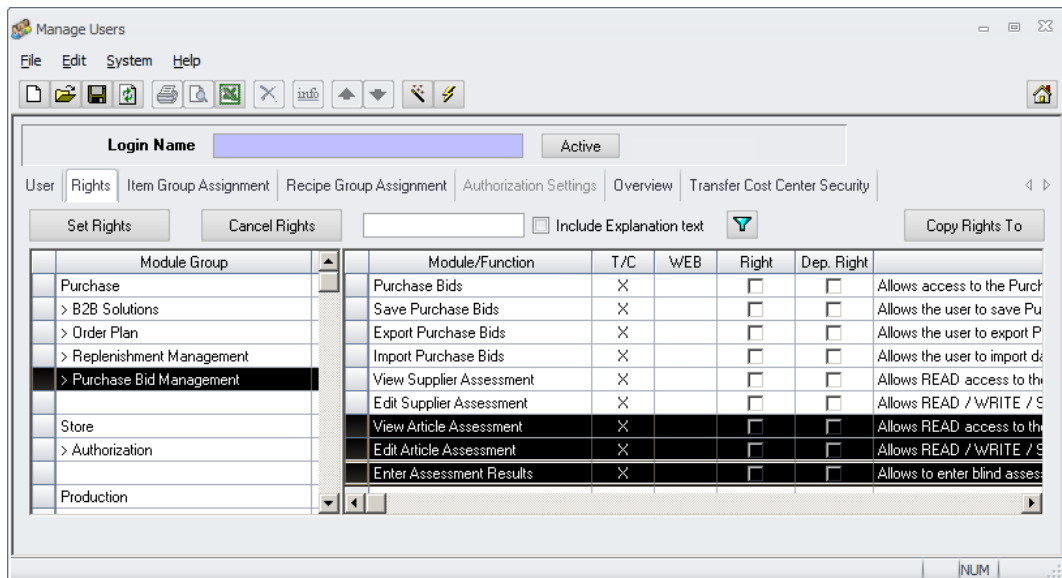
The first two rights are valid for the part located in the module Bid Management:

View Article Assessment: Having this right the user can view entered assessments and their results.

Edit Article Assessment: Having this right the user can create new assessments, edit existing ones and also enter results for other users.

NOTE: The user must have the user rights "Purchase Bids" to access the main module in general, also before he could start the Article Assessment!
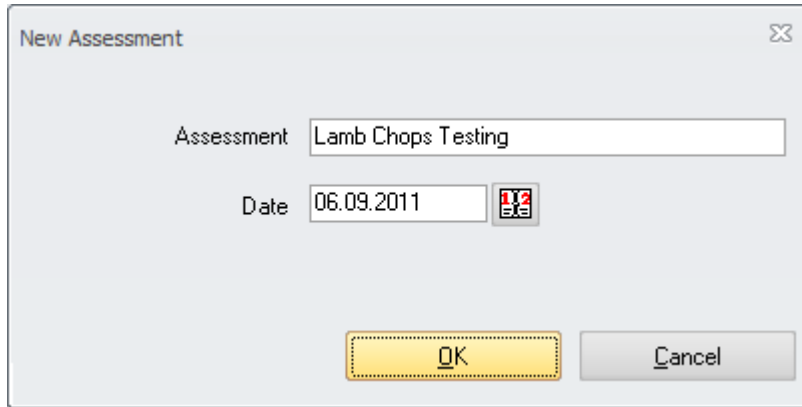
Enter Assessment Results: This third right should be set for users just entering their own results or for other users as well.

- o In combination with the rights "Purchase Bids" and "View Article Assessment" the user can enter results for other users in the Article Assessment module in the Bid Management. But he cannot change any other details of the assessment. This should be set for the administrators of the assessment.

- o In combination with the right Master Data > "Articles" the user can access the blind test module located in the Article module. This should be set for the "normal" testers assigned to an assessment.
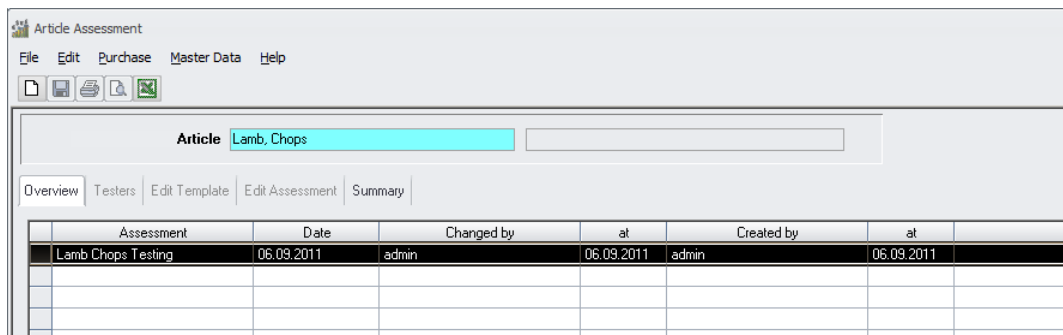
Setup of Assessments:

This module could be used with or without the Bid Management. In order to activate this for the Bid Management as well please open System > Configuration > [CUSTOM]:

Here you can find the parameter ARTICLEASSESSMENT.

Set this parameter to T in order to activate the use of this module in the Bid Management.

Start the module Bid Management and select from the main menu the section "Assessment". Here you can find the module "Article Assessment".

Start the module:

In the header section the article must be selected.
In the grid below the details of the assessment are displayed.

Select any article and click on "New Assessment":

The system now asks for a title for this assessment and the date. Enter the details and click on OK.
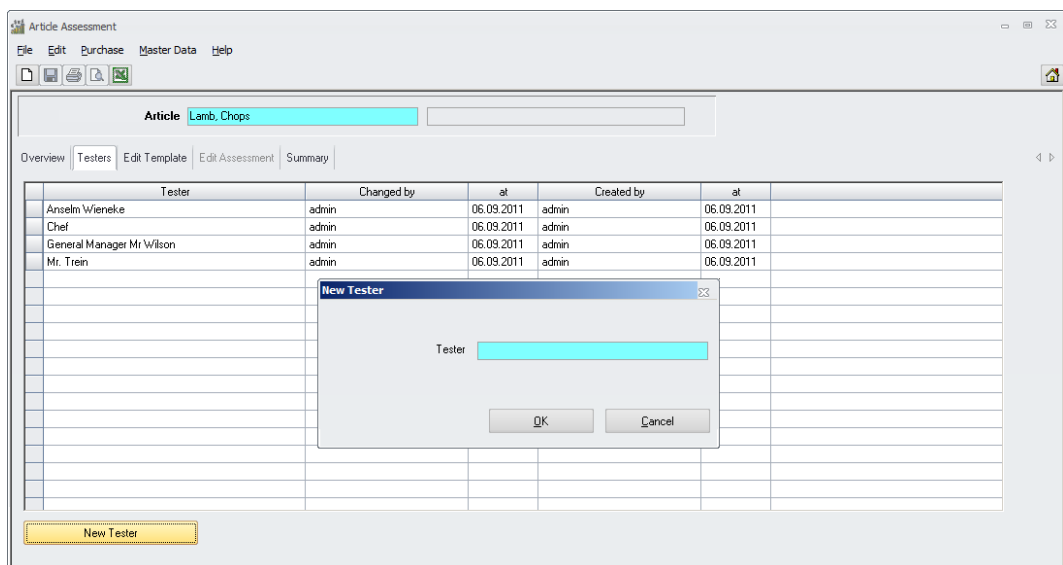
Now the header information for this assessment is saved in the grid. Here all assessments for this article will be visible.

Double click on the record in the grid.

The application will now switch to the next tab "Testers". Here the testers for this assessment can be defined.

Please note that only the testers defined here will be able to enter the results for this assessment in the article module later on.
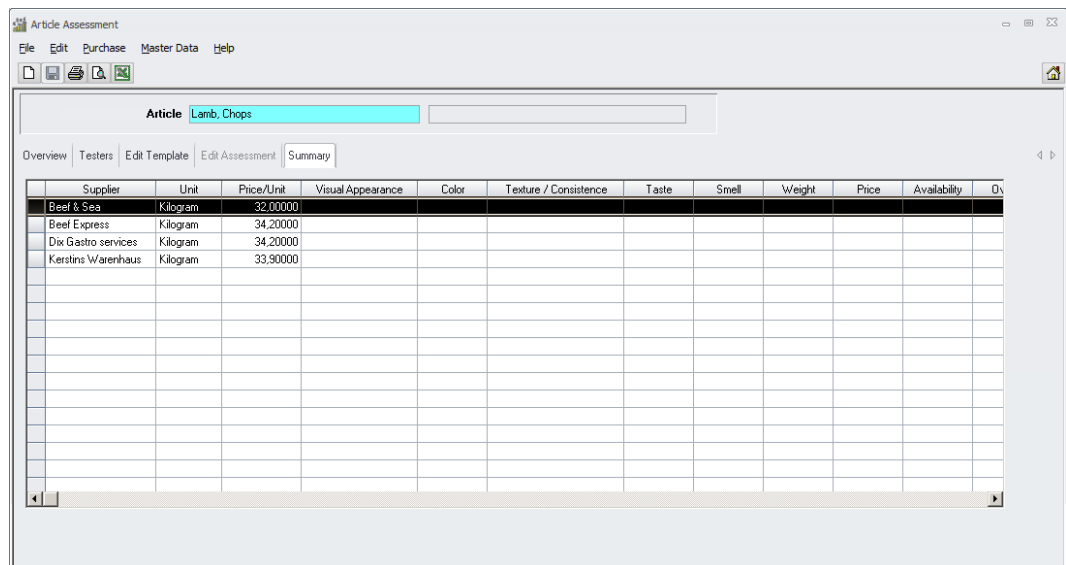
Once all testers are added, please switch to the next tab called "Edit Template":
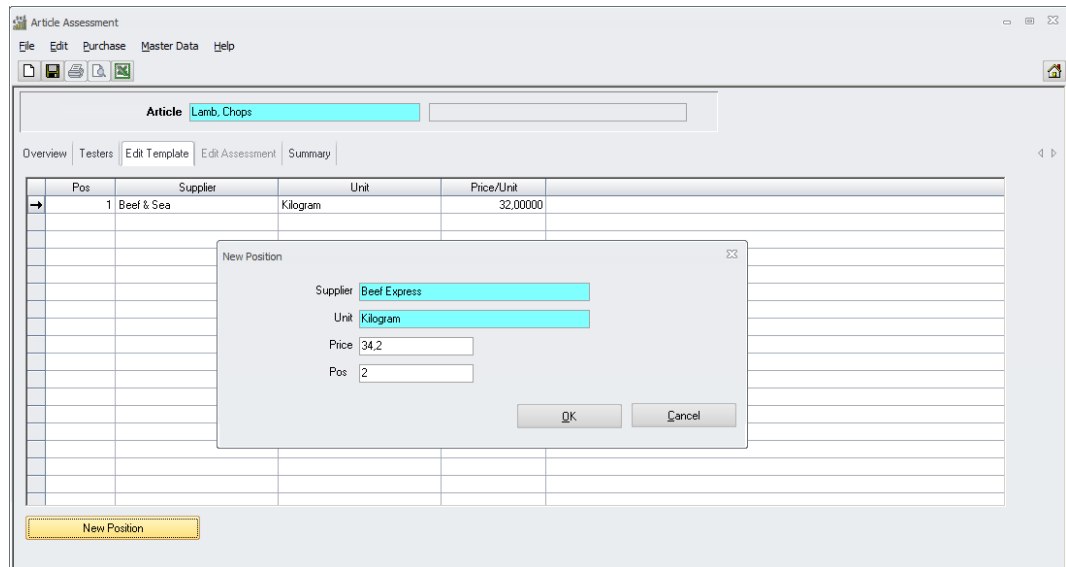
Here the details of all samples for the testing should be entered.
- Supplier (not visible while entering details)
- Unit
- Price
- Sequential Number (for sample identification)

Once all suppliers are listed, please switch to the tab "Summary"

At a later stage this tab will show the summary of the entered results.

Similar to the Supplier Assessment the criterias for the assessments must be pre-defined in the configuration now.

The labels for the 10 fields are free definable, but are valid for all Article Assessments.

They should show the criterias you want to use for the assessments, such as…
- Visual Appearance (How does the article look in general?)
- Colour (Is the colour as expected?)
- Texture / Consistence (Does it "feel" as expected?)
- Taste (Does it taste as expected?)
- Smell (Does it smell as expected?)
- Weight (Is the weight as expected?)
- etc. …

To define these labels please open System > Configuration > [CUSTOM]:
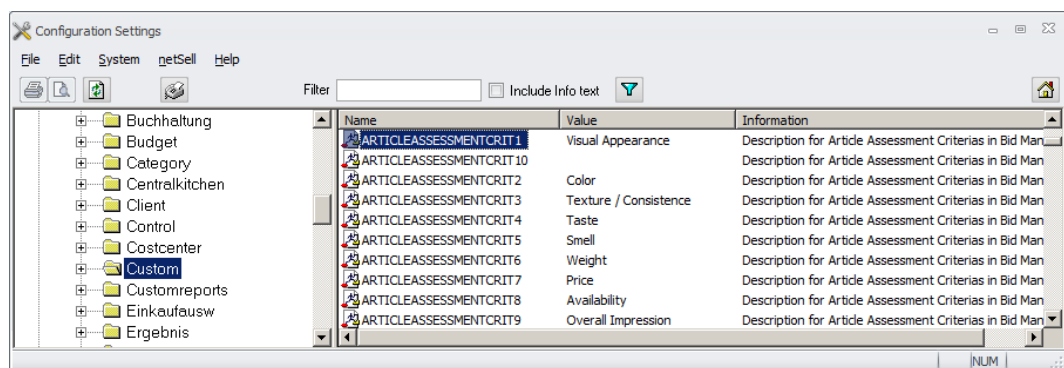
Here you can find the parameters ArticleAssessmentCrit 1 – 10:
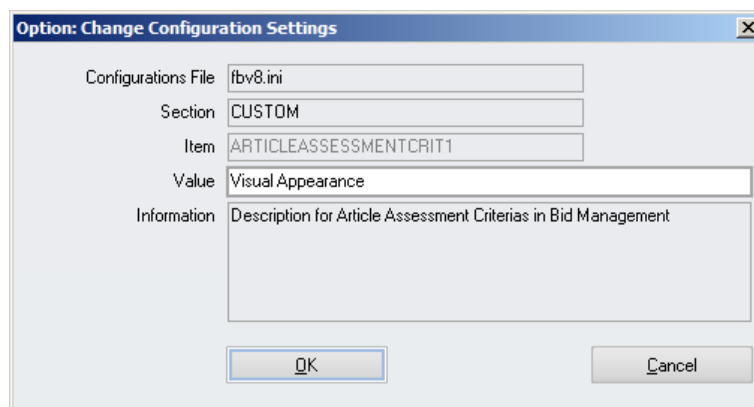
Enter the description for the criteria to be shown in the Assessment and click OK.

Now the main Article Assessment could start.

Entering Blind Results:

The purchase manager (or the user responsible for the assessment) informs all user listed as Testers in the Article Assessment.

These users now should open MC, go to Master Data > Articles and open the article they should test.
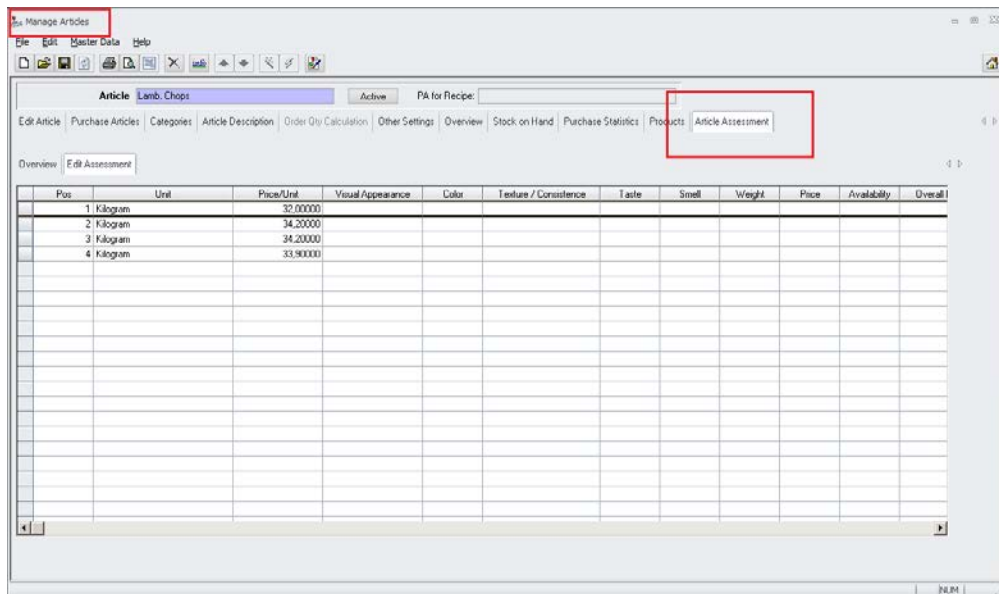
At the very right end of the tab list the Article Assessment can be found (see section User Rights).

If the user was defined in the Assessment setup, he will be able now to participate in the assessment. If the user is not defined in the Assessment setup, no records for testing will be shown!

The user now should print his test sheet and go to the Assessment:
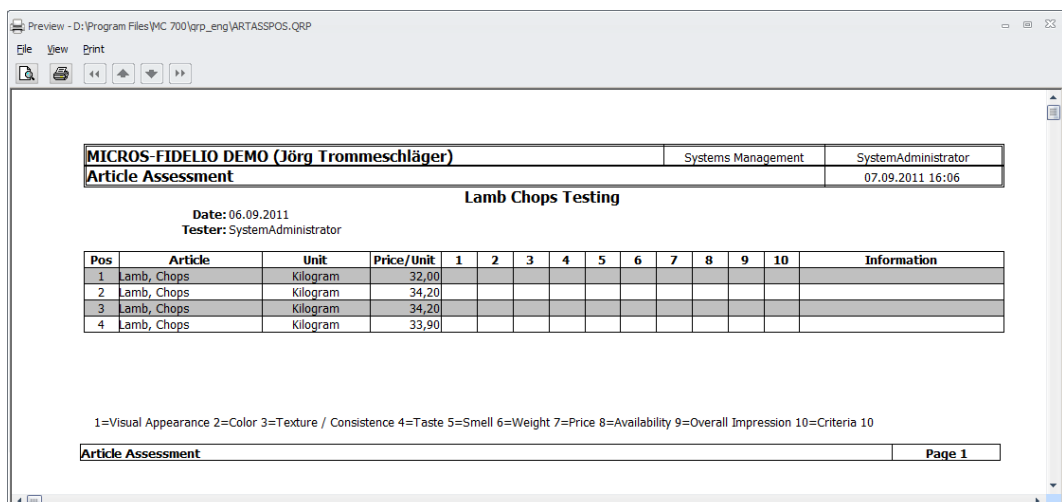
On this test sheet the user now can see the main description of the article, the units for the (here) 4 samples and their prices. Next to this there are the 10 columns to enter the results; the legend for the columns is visible at the bottom. Please keep in mind that lower grades are considered as good and higher grades are considered as negative.

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 71 of 75

The supplier, of course, will not be visible, as this could influence the result.

Once all critieria have been rated the user now can enter his results into the system in the module Manage Articles:

- either click directly into the grid
  … or
- in the dialog window after double click on the records:

At the end of the grid the system will calculate the average grade for each sample.

Right next to this field the free text comment is shown.

Save the results.

Entering Results for other Users:

Sometimes not all users participating at the Assessment are "normal" system users. For these users the Assessment administrator could pre-print the test sheets directly from the Article Assessment Setup screen.
These users just needed to be created in the Materials Control database and to be defined in the Assessment.
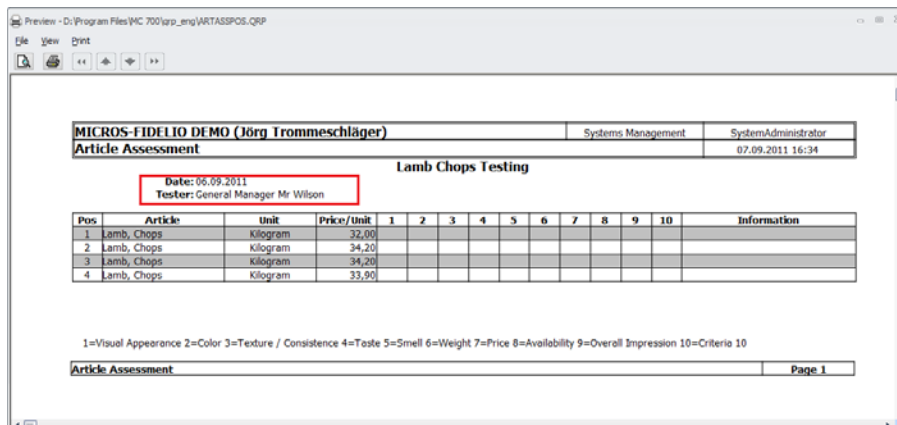
Open the assessment in the Bid Management module and switch to the tab "Testers":
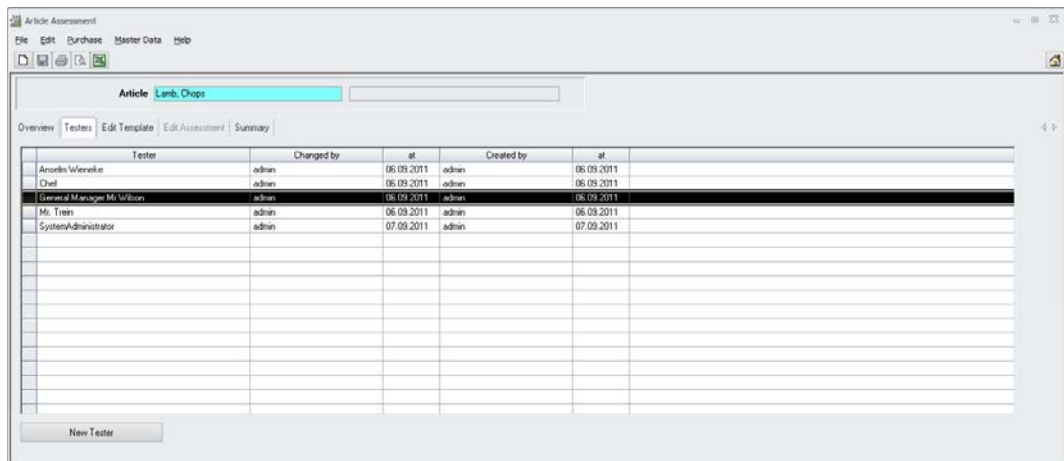
At this point you need to double click the user name:
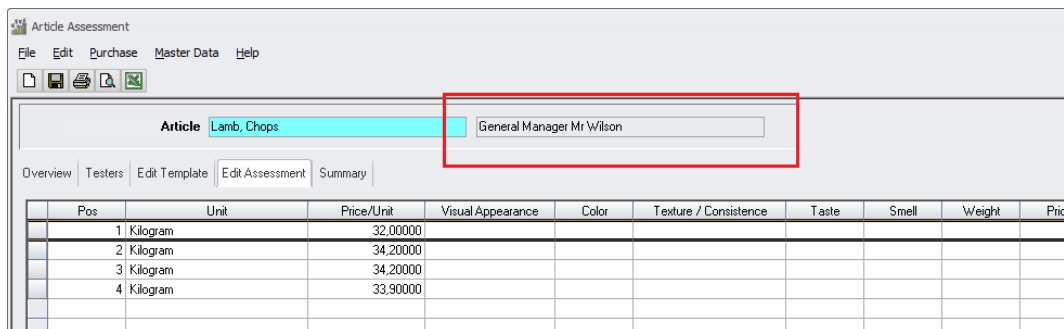
The system will switch the identity of the user but only for this segment. You can now print the test sheet:

Document title   Bid Management
Author   Joerg Trommeschlaeger
Department   Materials Control
Date   14.08.2014
Page 73 of 75

This way the assessment administrator could print all test sheets if necessary.
After completion of the assessment the results noted on the test sheets for each user can be entered into the system.

Summary:

After all testers have entered their results (direct or indirect), the assessment administrator could review the summary of the Article Assessment.
Check the tab "Summary" for the just completed assessment:

Here now the system shows the average results per sample, but also including the supplier name (since the purchase manager will need this for his decision).
The grid shows …
- … per field the average result from all testers
- … at the right end of each record the average result of all criterias for the sample

The result of this assessment will be visible in the Bid Management screens (see previous chapters) and will help to select the right supplier for the quotes.

Bid_Mode 2:

Currently not fully supported.

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