

OTD-S DATA & TICKETING IN HERAPRO

June 2020



AGENDA – OTD-S DATA & TICKETING IN HERAPRO

1 | TOP 1
› General information OTD-S data & ticketing in HeraPro

2 | TOP 2
› OTD-S Data – Supplier view

3 | TOP 3
› OTD-S ticket (initiated by supplier)

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TOP 1 - GENERAL INFORMATION OTD-S DATA & TICKETING IN HERAPRO

OTD-S = On Time Delivery Supplier



TOP 1 – GENERAL INFORMATION OTD-S DATA & TICKETING IN HERAPRO

OTD-S...

- › ...is a measure of process and supply chain efficiency
- › ...measures the amount of purchased goods delivered to Heraeus on time and completely
- › ...helps determine how efficiently Heraeus suppliers are meeting confirmed delivery dates

Calculation

- › Measurement of delivered PO item / schedule lines:
 - › Comparison of Goods receipt posting date vs. statistical delivery date of PO schedule line

Goods receipt date	= statistical delivery date of PO schedule line	→ punctual	<i>(ontime)</i>
Goods receipt date up to 5 working days	< statistical delivery date of PO schedule line	→ ≤5 days too early	<i>(ontime)</i>
Goods receipt date more than 5 working days	< statistical delivery date of PO schedule line	→ too early	
Goods receipt date	= statistical delivery date of PO schedule line + 1 working day	→ 1 day late	<i>(ontime)</i>
Goods receipt date	> statistical delivery date of PO schedule line + 1 working day	→ too late	

$$\text{OTD-S} = \frac{\text{Total number of PO schedule lines on time} \\ \text{(punctual + 1 day too late + 5 days too early due in reporting period)}}{\text{Total number of completely delivered PO schedule lines} \\ \text{(due in reporting period)}}$$

TOP 1 – GENERAL INFORMATION OTD-S DATA & TICKETING IN HERAPRO

- › **Basic information** regarding OTD-S data transferred to HeraPro
 - › Data transfer update once per week (YTD data & detailed data) (Monday morning 5 am)
 - › Data transfer considers completed previous week
 - › Changed data of previous weeks will be updated (overwriting of historical data)

- › **Benefits** for Supplier:
 - › Continuous tracking of delivery performance (so far only once per year by supplier evaluation)
 - › Basis for understanding supplier performance results and to identify unjustified negative ratings
 - › Basis for root cause analysis and continuous improvement of supplier performance

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TOP 3 – OTD-S DATA – SUPPLIER VIEW

Purpose

› Publish weekly updated OTD-S YTD rate and related PO lines to continuously track own performance and identify unjustified ratings

View supplier OTD-S data by

- 1) Select Supplier Portal dashboard
- 2) OTD-S tables for aggregated & detailed data are displayed automatically

- 3) View OTD-S Aggregated Data
 - OTD-S rate in % current week (CW)
 - OTD-S rate in % (YTD)

- 4) View OTD-S Detail Data
 - Selected details directly displayed in dashboard, full data set available under “(i) More”

The screenshot shows the 'Supplier Portal Dashboard' with a sidebar on the left containing navigation icons. The main content area is titled 'Overview' and contains two tables. The first table, 'OTD-S', shows aggregated data for 'Heraeus Pro...' and 'Heraeus gl...'. The second table, 'OTD-S DETAILS', shows detailed data for various PO lines. A '(i) More' button is visible at the bottom of the details table.

Heraeus Pro...	Calendar ye...	Material pro...	Number of P...	Number of P...	Number of P...	OTD-S rate i...	Number of P...	Number of P...	Number of P...	OTD-S rate i...
HPM	202020		0	1	1	0.000	25	4	29	86.206
Heraeus gl...	202020		0	1	1	0.000	25	4	29	86.206

Calendar ye...	Purchase Or...	PO line ID	PO schedule...	Statistical d...	Goods recei...	*Difference ...	OTD-S classi...	Plant name	Heraeus Pro...	Heraeus ma...
202008	4000339090	00010	0001	18.02.2020	18.02.2020	0.000	Punctual	HDE Hanau	HPM	000000000...
202008	4000336601	00010	0001	17.02.2020	17.02.2020	0.000	Punctual	HDE Hanau	HPM	000000000...
202003	4000325536	00010	0001	15.01.2020	15.01.2020	0.000	Punctual	HDE Hanau	HPM	000000000...
202003	4000324517	00020	0001	16.01.2020	14.01.2020	-2.000	≤ 5 days to...	HDE Hanau	HPM	000000000...
202003	4000324517	00010	0001	14.01.2020	14.01.2020	0.000	Punctual	HDE Hanau	HPM	000000000...

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TOP 5 – OTD-S TICKET (INITIATED BY SUPPLIER)

Purpose

- › Contacting Heraeus buyer to clarify OTD-S rate or detailed purchasing data, e.g. in case of unjustified negative OTD-S rate for a dedicated PO line

- › Ticket can be issued for
 - › Unjustified OTD-S rating
 - › Statement OTD-S (stating reasons and counter measures for improvement proactively)
 - › Master data clarification (e.g. planned delivery times, Incoterms)

The screenshot shows the 'Supplier Portal Dashboard' with the following sections:

- BASE DATA:** Overview of supplier information.
- OTD-S:** Table showing OTD-S rates for different materials and plants.

Heraeus Pro...	Calendar ye...	Material pro...	Number of P...	Number of P...	Number of P...	OTD-S rate i...	Number of P...	Number of P...	Number of P...	OTD-S rate i...
HPM	202020		0	1	1	0.000	25	4	29	86.206
Heraeus gl...	202020		0	1	1	0.000	25	4	29	86.206
- OTD-S DETAILS:** Table providing detailed information for each OTD-S entry, including purchase order, PO line ID, and dates.

Calendar ye...	Purchase Or...	PO line ID	PO schedule...	Statistical d...	Goods recei...	*Difference ...	OTD-S classi...	Plant name	Heraeus Pro...	Heraeus mat...
202008	4000339090	00010	0001	18.02.2020	18.02.2020	0.000				
202008	4000336601	00010	0001	17.02.2020	17.02.2020	0.000				
202003	4000325536	00010	0001	15.01.2020	15.01.2020	0.000				
202003	4000324517	00020	0001	16.01.2020	14.01.2020	-2.000				
202003	4000324517	00010	0001	14.01.2020	14.01.2020	0.000	Punctual	HDE Hanau	HPM	
- RFOS:** Table of Request for Quote (RFQ) items with status indicators like 'DONE' or 'CHECKING'.

RFQ no.	RFQ name	RFQ version	Status	Deadline
475	HORM Test N...	1	DONE	2018-10-12 2...
474	Test 2018_M...	1	CHECKING	2018-10-22 2...
291	test mail	1	CHECKING	2018-04-12 2...
163	Test_PH	1	CHECKING	2018-03-13 2...
96	Testcase_1	1	CHECKING	2017-12-14 2...
- ORDERS:** Table listing purchase orders with line items and creation dates.

Order no.	Line items	Date cre...
4000372730	1	2020-06...
4000372715	1	2020-06...
4000372714	1	2020-06...
4000372663	1	2020-06...
4000372662	1	2020-06-18 09:29
- TICKETS:** Table showing the status of various tickets.

Name	ID	Created	Status	Responsibl...	Assigned to
Test OTDS...	OTD-S Sup...	2020-06-2...	Check Her...	--	Brust Joch...
Stellungna...	OTD-S000...	2020-06-2...	In process	--	Test Alexa...
Stellungna...	OTD-S000...	2020-06-2...	Declined	--	Matzel Cla...
Lieferung ...	OTD-S Sup...	2020-06-2...	closed	--	Test Alexa...
Stellungna...	OTD-S000...	2020-05-0...	New	--	--

Callouts in the image:

- 'Create an OTD-S ticket' points to the OTD-S table.
- 'Ticket overview: pending & closed tickets' points to the TICKETS table.
- 'CLARIFICATION OTD-S' points to a button in the interface.

TOP 5 – OTD-S TICKET (INITIATED BY SUPPLIER)

How to handle an OTD-S clarification ticket

- 1) Choose **Clarification OTD-S**
- 2) Add **ticket subject**
→ for better identification of ticket in ticket overview, e.g. OTD for PO 4000123456 unjustified
- 3) Choose **request reason** out of drop down
- 4) Choose **request recipient Heraeus** out of drop down (list of all existing Heraeus buyer^{1,2})
- 5) Add **Purchase Order reference** (optional)
- 6) Add a **detailed description (comment)** for the reason of issuing the ticket
- 7) **Attach related documents** (optional)
- 8) Choose **action**
 - a) **“Save”** to store the current state as a draft
 - b) **“Send to supplier”** to issue the ticket to the selected supplier
- 9) Click **“Save”** to confirm the ticket and trigger ticket notification to the supplier contact person

¹ if a responsible buyer is maintained, ticket will be prefilled by responsible buyer

² if a dedicated PO has been selected, ticket will be prefilled by the buyer who issued the PO

OTD-S Supplier initiated -

Ticket Subject*: OTD for PO 4000123456 unjustified

Status: New

Please choose a reason for your contact request regarding OTD-S.
In case of an unjustified OTD-S rating please indicate always completely the relevant Purchase Order data, means Purch...
For general statements regarding your OTD-S rate, please indicate always relevant information in the comment area, e.g...
Your request can only be proceeded if all relevant data is completely provided."

Data

Request reason*: Unjustified OTD-S rating

Request recipient Heraeus*: [Please Select]

Purchasing document: 4000017865

Purchasing item: 00010 89000045 WASSERSTOFFPEROXID 35 % TECHN. REIN

Schedule line: 1

Comment*: This is a test for the user guide.

Attachments: Datei auswählen RE OTD-S f...001959.msg
[Attach Another File]

Actions

Action*: Send to Heraeus


Save
Draft Auto-Saved @ 2020-07-06 08:10

TOP 5 – OTD-S TICKET (INITIATED BY SUPPLIER)

Ticket notification by E-Mail to Heraeus buyer based upon OTD-S clarification request from supplier (Example):


[EXTERNAL] OTD-S clarification request from

GmbH & - 1032093 – Action required until 2020-07-01

 no-reply@app11.jaggaer.com
An P4T, HH;

 Antworten	 Allen antworten	 Weiterleiten	
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Mi 24.06.2020 17:00

 Sie haben diese Nachricht am 24.06.2020 17:06 weitergeleitet.

Dear ,

GmbH & has sent an OTD-S clarification request regarding the following reason: unjustified

Please check the details of this clarification request issued by Test Alexander and send your answer to the supplier within the upcoming 5 working days.

Please use the following link to access detailed data of the issued clarification request:

[Link](#)

Kind regards

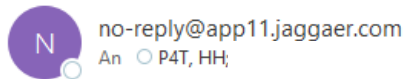
Test Alexander

THIS EMAIL WAS CREATED AUTOMATICALLY. DO NOT REPLY!

TOP 5 – OTD-S TICKET (INITIATED BY SUPPLIER)

Heraeus buyer answer by E-Mail to supplier based upon OTD-S clarification request from supplier (Example):

[EXTERNAL] OTD-S clarification request answer from



Mi 24.06.2020 16:26

Dear Test Alexander,

Heraeus buyer. has sent an answer to your OTD-S clarification request.

Answer:

Doch!

Thank you for your support and collaboration to work together with us to improve delivery performance..

Kind regards

THIS EMAIL WAS CREATED AUTOMATICALLY. DO NOT REPLY!

