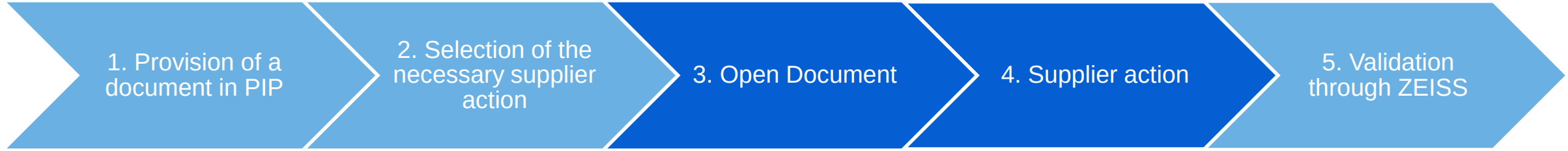
Document exchange with PIP
Step-By-Step Supplier Manual

Oberkochen, 08.04.2019

PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
General Information

Content of this document:
This is a step-by-step manual of the document exchange process between ZEISS and suppliers, through the leading ZEISS SRM Platform PIP (Procurement Interaction Portal).

Overview of the process steps for the document:
Five steps are necessary for a successful document exchange



Remark:
Depending on which supplier action the initiator of the process selects, various processing steps under point 4 on the supplier side may become necessary.

PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)

Suppliers have many advantages through the DAE

What advantage does the document exchange process will be created for ZEISS suppliers??

- Suppliers always receive the latest information on ZEISS and ZEISS purchasing via the PIP-DAE.
- Documents, which are required for sending out an order become visible for all ZEISS areas. Therefore suppliers only have to upload the documents once, to the PIP-DAE.
- It is possible for both, suppliers and ZEISS, to version documents and inform the business partner about the versioning.
- Suppliers receive transparency about all exchanged documents with ZEISS.
- The use of the DAE via PIP strengthens communication and cooperation with ZEISS, processes are optimized and the flow of information will be improved.
- The information in the DAE is partly used by ZEISS to evaluate the suppliers and release them for further procurement activities.

PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
Suppliers have many advantages through the DAE

Set Up to use DAE:

- In order to exchange documents with ZEISS, you need access to the supplier portal PIP. If you do not have access yet, please contact your ZEISS representative.

- The documents are always sent to the contact person at the supplier who was deposited in PIP for document exchange. If you are an administrator in your company, you can call up the contact person as follows and change it if necessary (Log In):

  Navigation → Contacts → Document Exchange (general)

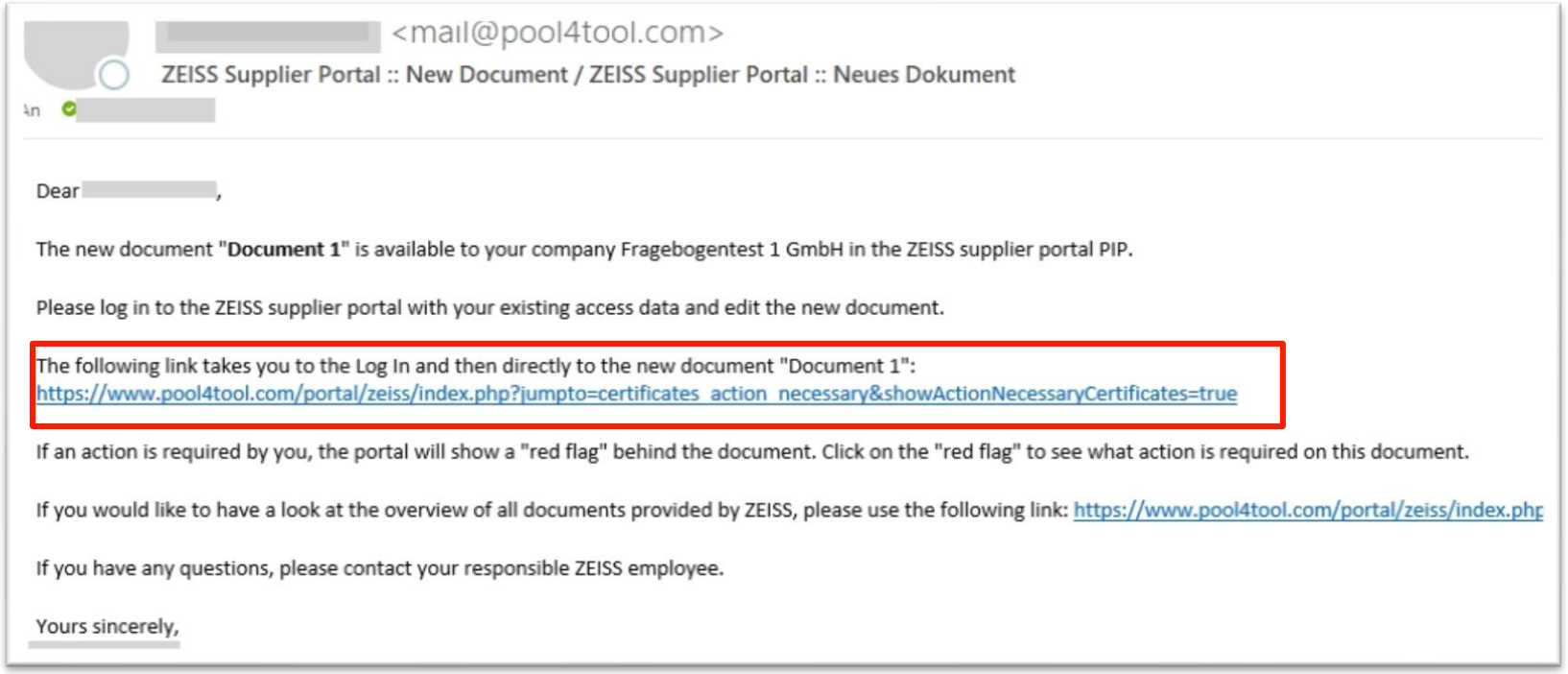
- If ZEISS wants to exchange a document with you, it must be actively provided by ZEISS for you.

- When providing the document, the ZEISS employee can select which action you as the supplier must carry out in step 4.

PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
3. Open the provided document

3. Open Document

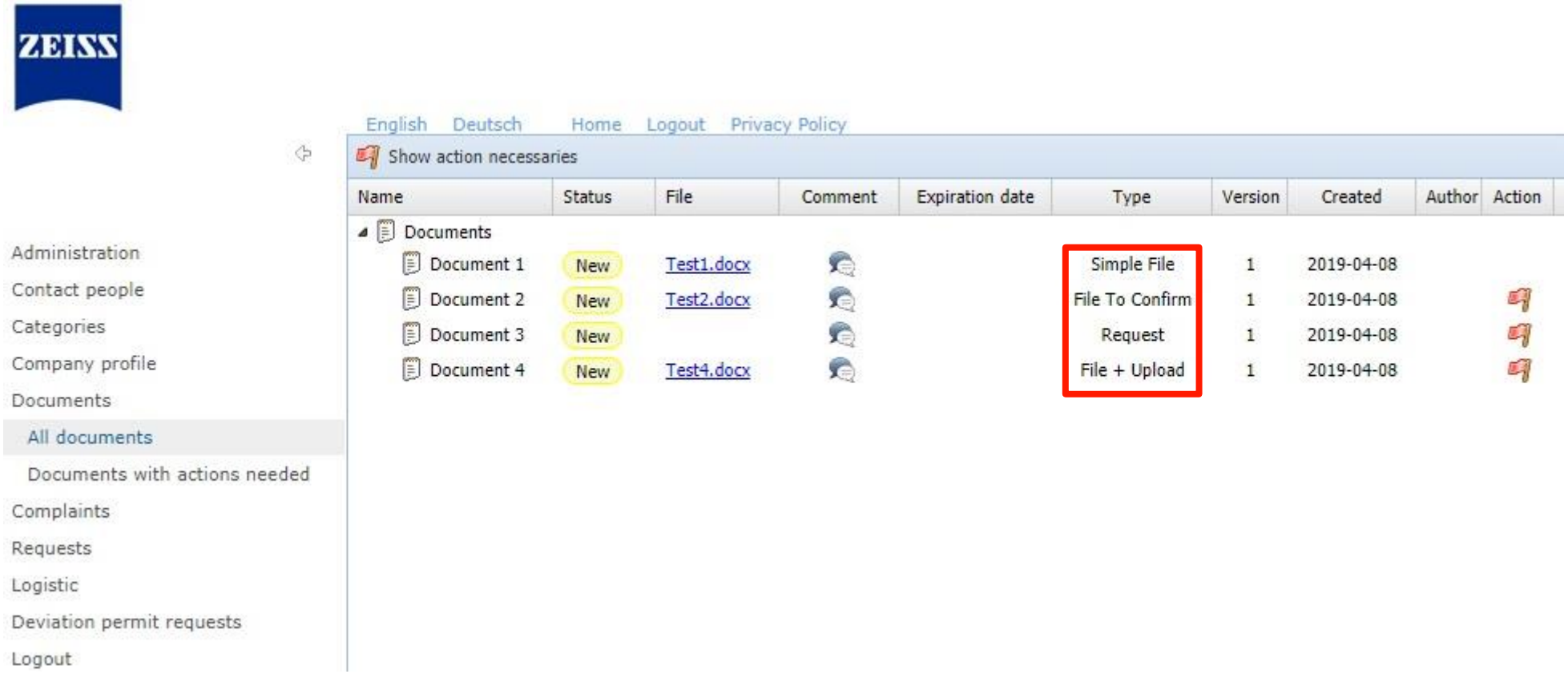
- You will receive an e-mail with sender and sender address mail@pool4tool.com with direct link to the document.
- Click on the first link and you will be redirected directly to the Log In to PIP. After successful log-in you will be forwarded directly to the new document.



PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
3. Open the provided document

3. Open document – Which document types are available?

There can be four different document types that trigger different vendor actions.



3. Open document – Which document types are available?

Simple File:
A document is provided in the portal, which you can download.

File to confirm:
You will be provided with a document in the portal for downloading. Then you have to decide whether to accept (release) or reject the document.

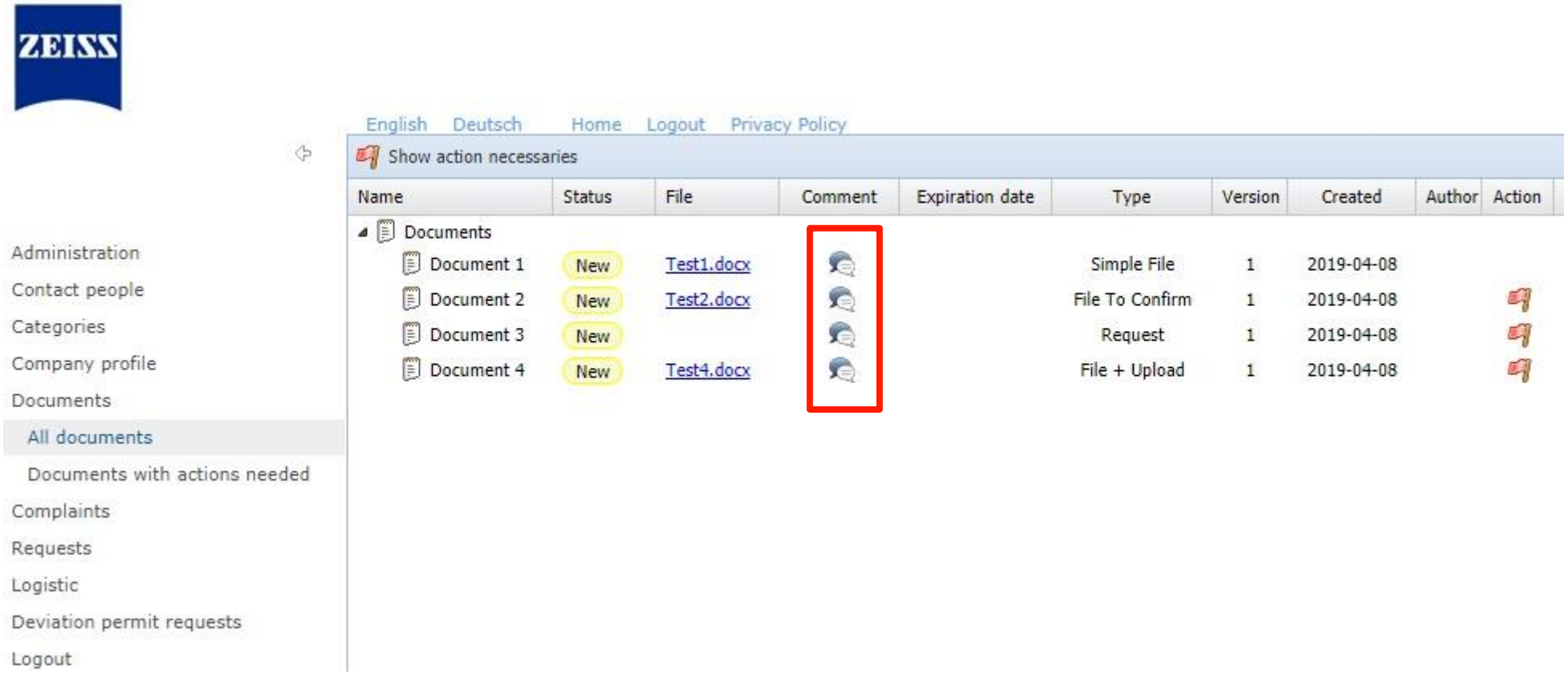
Request:
A document is requested from you as a supplier. If you can provide the document, you have the possibility to upload it directly in the portal.

File + Upload:
You will be provided with a document for download. Depending on the document, you should edit it, fill in or sign it and then upload it back to the portal.

PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
3. Open the provided document

3. Open document – Comment from ZEISS

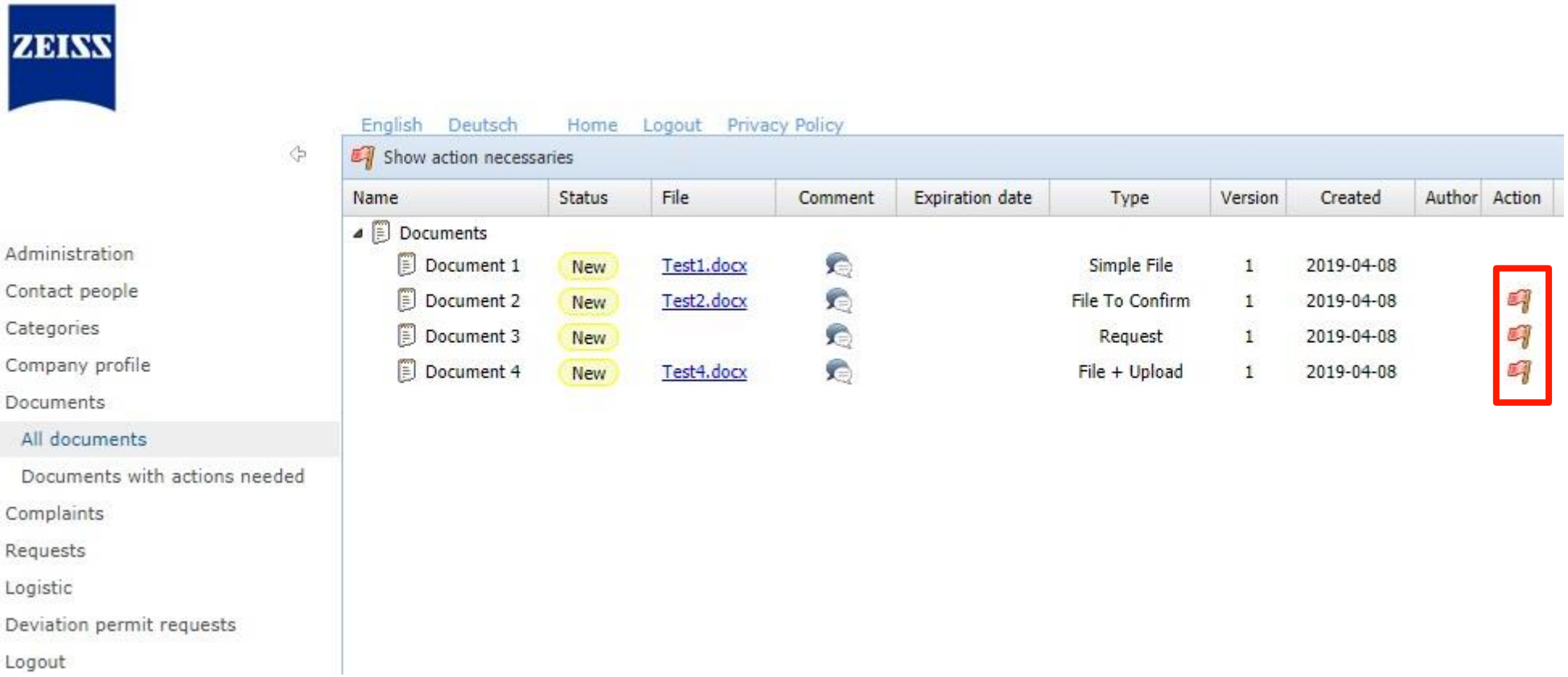
By clicking on the "Speech bubble" you can open the deposited comments on the document



PIP – Procurement Interaction Portal – Document Approval Exchange (DAE)
4. Supplier action

4. Supplier action – How are the necessary supplier actions carried out?

By clicking on the "red flag" you can perform the necessary action:

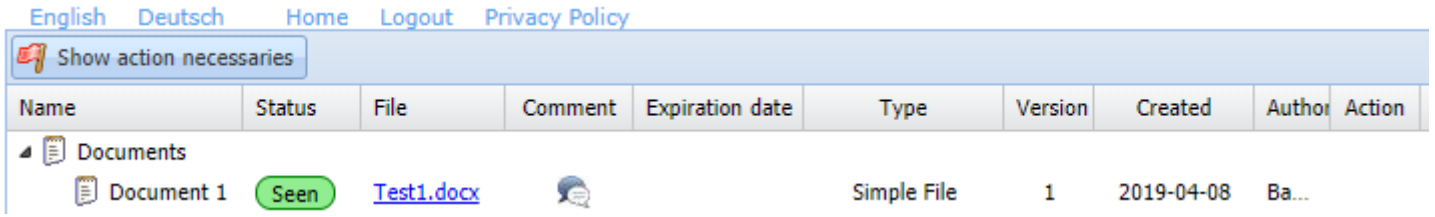


4. Supplier action – Simple File

By performing the supplier action, the document disappears from the menu “Documents with actions needed".

Simple File:

Here it is sufficient if you download the document by clicking on the document (Test1.docx). The status then changes to "Seen".

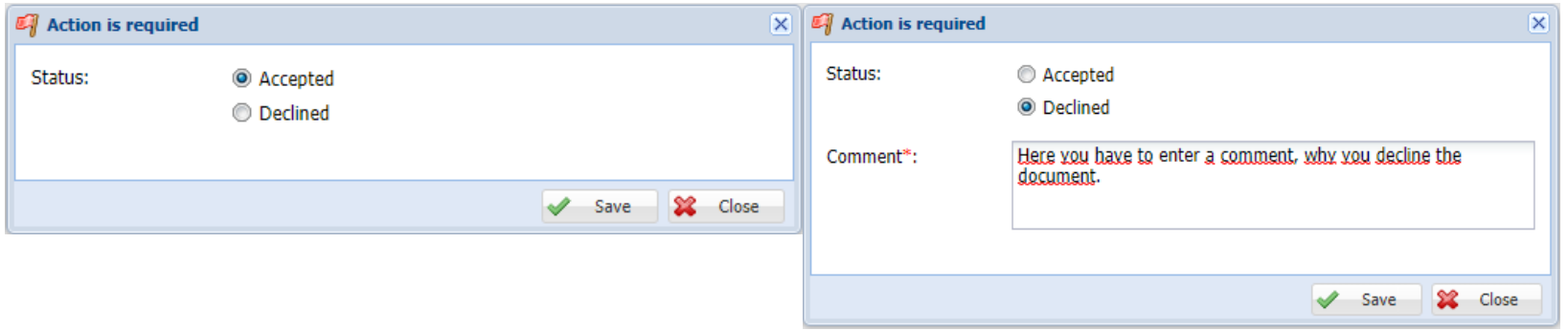


The expiration date indicates how long the document is valid.

4. Supplier action – File to confirm

You have been provided with a document in the portal for download. You then have to decide whether to accept (release) or reject the document.

By clicking on the document (Test2.docx) you download the document and the status changes to "Seen". Then click on the "red flag" to approve or reject the document:



After release, the status changes to "Accepted by supplier":

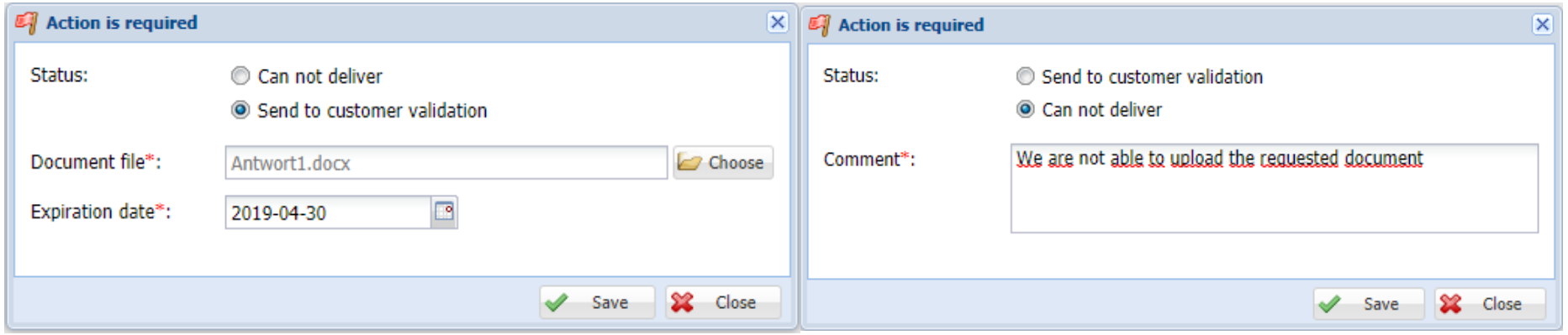
Name	Status	File	Comment	Expiration date	Type	Version	Created	Author	Action
Documents									
Document 2	Accepted by Supplier	Test2.docx			File To Confirm	1	2019-04-08	Bas...	

4. Supplier action – Request

A document is requested from you as a supplier. If you can provide the document, you have the possibility to upload it directly in the portal.

Open the comment to see more information about the requested document:

Click on the "red flag" to upload or refuse the requested document:



Please enter an expiration date for your document. If you do not have an expiration date, select today's date in one year.

If you reject the document, you must give a reason why the document is not available.

4. Supplier action – Request

By performing the supplier action, the document disappears from the menu "Show where actions are required".

After the upload, the status changes to "Wait for customer validation" because the responsible ZEISS employee checks your uploaded file:

Name	Status	File	Comment	Expiration date	Type	Versior	Created	Author	Action
Documents									
Document 3	Waiting for customer validation	Antwort1.docx		2019-04-17	Request	1	2019-04-08		

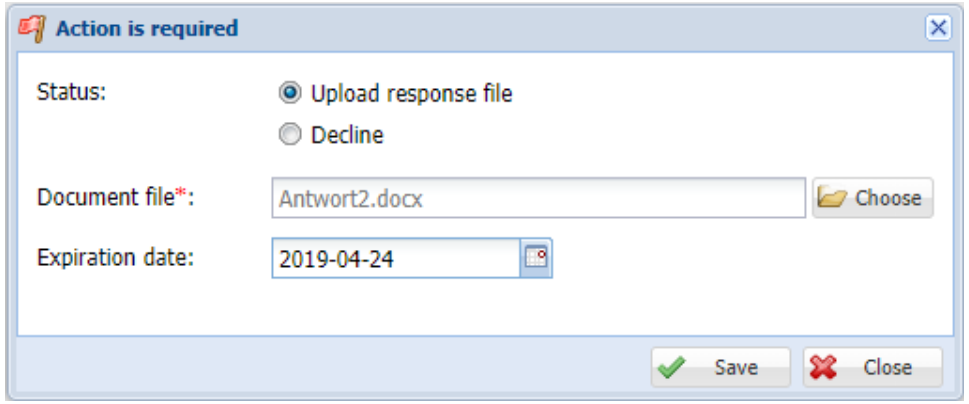
If the purchaser has checked your document, the status changes to "Accepted by customer", the flag turns black and the exchange process is complete:

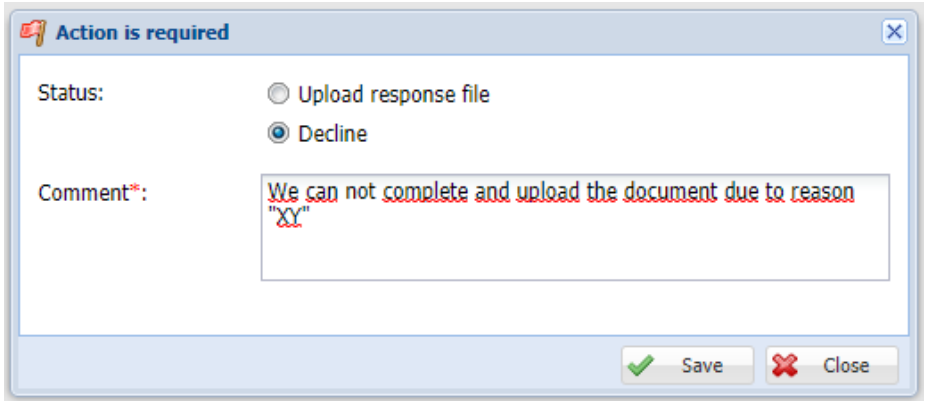
Name	Status	File	Comment	Expiration date	Type	Versior	Created	Author	Action
Documents									
Document 3	Accepted by Customer	Antwort1.docx		2019-04-30	Request	1	2019-04-08	Bastian Haerter (ZOBHAER)	

4. Supplier action – File + Upload

You will be provided with a document for download. Depending on the document, you should edit it, fill in or sign it and then upload it back to the portal.

By clicking on the document (Test4.docx) you download the document and the status changes to "Seen". Then you can edit the document (sign, fill out, ...). Once you have finished editing the document, click on the "Red Flag" button to upload your response file to the portal:





Please enter an expiration date for your document. If you do not have an expiration date, select today's date in one year.

If you reject the document, you must give a reason why the document can not be uploaded.

4. Supplier action – File + Upload

By performing the supplier action, the document disappears from the menu “Documents with actions needed".

After the upload, the status changes to "Waiting for customer validation" because the responsible ZEISS employee checks your upload again:

Name	Status	File	Comment	Expiration date	Type	Versior	Created	Author	Action
Documents									
Document 4	Waiting for customer validation	Antwort2.docx		2019-04-30	File + Upload	1	2019-04-08	Bas...	

If the purchaser has checked your document, the status changes to "Accepted by Customer", the flag turns black and the exchange process is complete:

Name	Status	File	Comment	Expiration date	Type	Versior	Created	Author	Action
Documents									
Document 4	Accepted by Customer	Antwort2.docx		2019-04-30	File + Upload	1	2019-04-08	Bas...	

ZEISS