

ZEISS Procurement Interaction Portal

Supplier Manual



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1 Welcome Page

We are pleased to welcome you as our partner and appreciate your commitment to use our ZEISS Supplier Portal for an optimized cooperation. In this portal, we create the basis for an efficient, transparent and smooth handling of our processes. The consistent use of the portal is essential to ensure our common standards and the highest level of cooperation.

1.1 Objectives

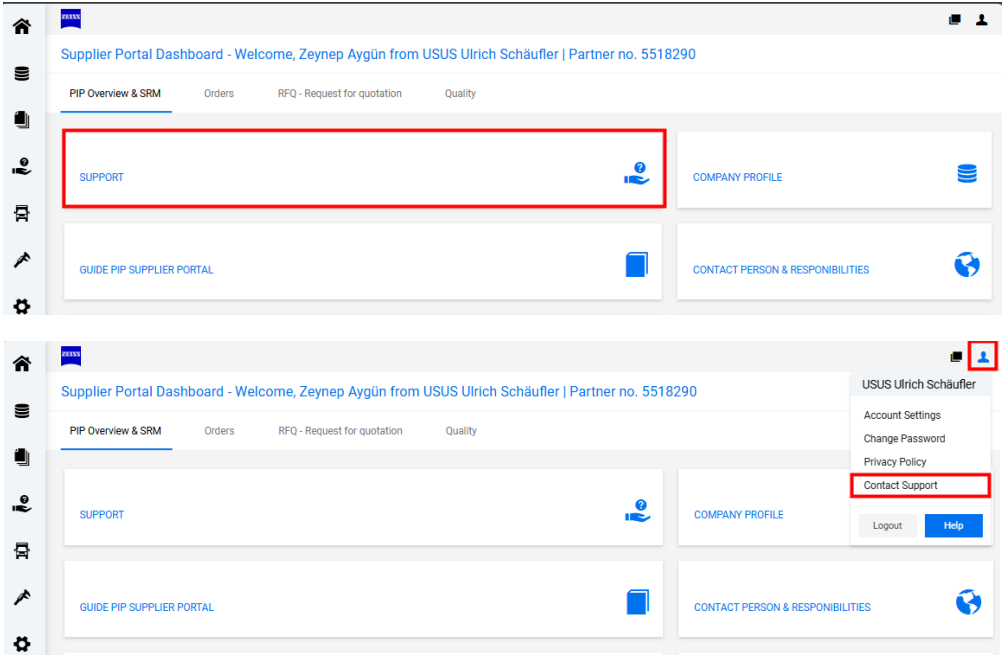
This document serves as a manual for suppliers to use the ZEISS Supplier Portal PIP (Procurement Interaction Portal - JAGGAER). It describes all existing functions and processes that can currently be managed via the ZEISS Supplier Portal.

This manual is structured in such a way that you can jump directly via the navigation to the respective process that you want to execute. In each section, you will find:

- How the platform and its module work
- Overview of process steps
- Detailed click instructions for process execution

1.2 Support & Help

If you are unable to find the assistance you need in this manual, please contact JAGGAER Support. JAGGAER Support is also your first point of contact for technical problems with the Supplier Portal.

Instruction	View
<p>To contact JAGGAER Support, click the "Support" link on the dashboard.</p> <p>or</p> <p>Click the user icon in the upper right corner and select "Contact Support".</p>	 <p>The image shows two screenshots of the ZEISS Supplier Portal dashboard. The top screenshot shows the 'SUPPORT' link highlighted with a red box. The bottom screenshot shows the user profile dropdown menu with 'Contact Support' highlighted by a red box.</p>

1.3 Supported Browsers

JAGGAER supports the following browsers. Although other browsers and versions not listed in the table below may work, they have not been fully evaluated and are not recommended.

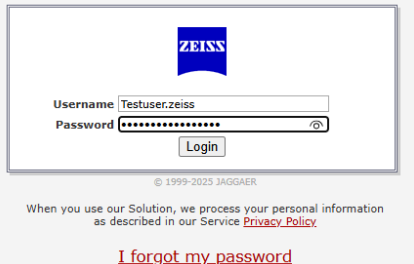
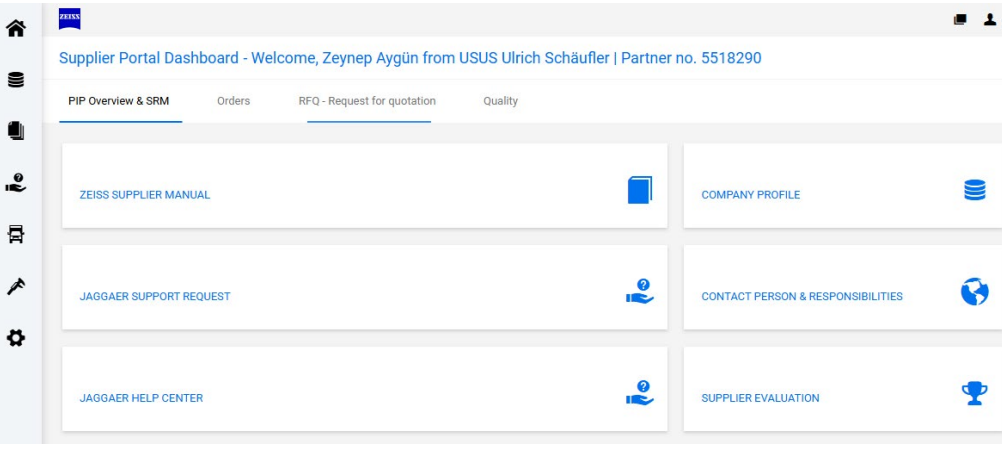
Browser	Supported version(s)
Chrome/Chromium	<ul style="list-style-type: none"><li data-bbox="512 454 871 488">▪ Latest stable version only
Mozilla Firefox	<ul style="list-style-type: none"><li data-bbox="512 492 871 526">▪ Latest stable version only<li data-bbox="512 526 951 562">▪ Extended Support Release (ESR)
Microsoft Edge	<ul style="list-style-type: none"><li data-bbox="512 566 871 600">▪ Latest stable version only<li data-bbox="512 600 916 629">▪ Two previous stable versions

2 Overview ZEISS Supplier Portal PIP & General Functions

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2.1 Access

With your access credentials you can register in the ZEISS Supplier Portal. The following procedure describes how you can log in with your login data. Please keep your access data safe and secure.


Instruction	View
<ol style="list-style-type: none"> 1. Open the ZEISS Supplier Portal PIP. 2. Log in with your existing user account. 	 <p>i If you do not have access credentials available, please contact your ZEISS contact person. If a user already exists for your company, your colleague can also set up an access for you.</p>
<ol style="list-style-type: none"> 3. After successful login you will see the dashboard of the ZEISS Supplier Portal PIP. 	






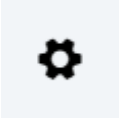
2.2 Navigation

You can navigate in the ZEISS Supplier Portal PIP either via the navigation bar or directly via the dashboard. Both options are explained below.

2.2.1 Navigation Bar

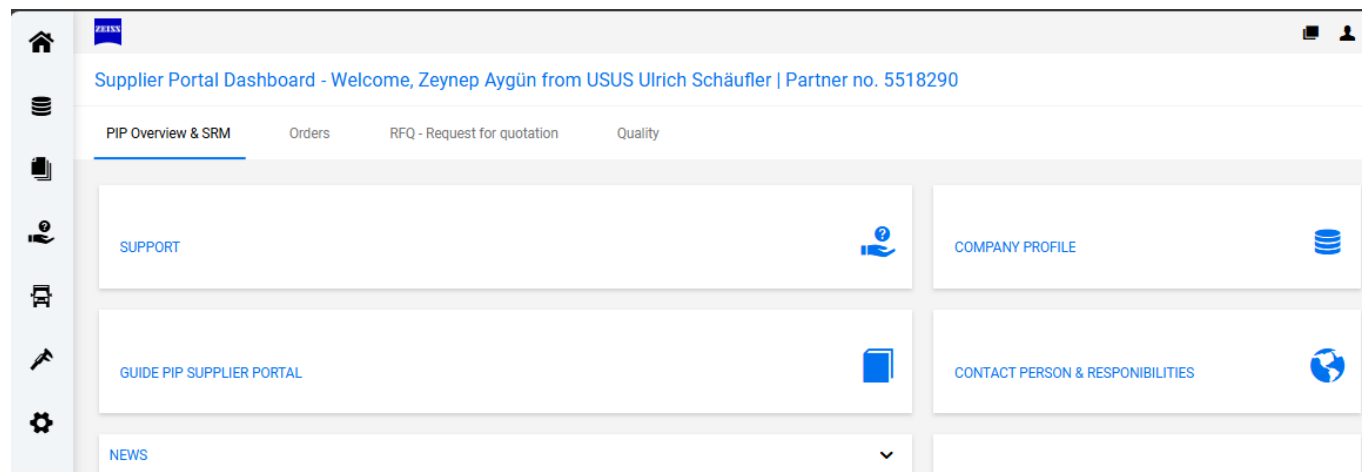
The navigation bar is located at the left edge of the ZEISS Supplier Portal PIP. Here you can navigate directly to the respective module or to the desired function.

Icon	Name	Description
	Home	Back to Dashboard.

	<p>Primary data</p>	<p>Base Data, Categories, Contact People, Additional Addresses, Company Profile.</p>
	<p>Documents</p>	<p>Standard Documents (download area), Document Approval Exchange (DAE), Tickets (Workflows - Special Releases, Deviation Approvals), Contracts and Category Contracts.</p>
	<p>Requests</p>	<p>RFQ Pure (requests), EAuctions and Actions (tasks).</p>
	<p>SCM Orders</p>	<p>Direct Purchase Orders (Order List, Position List, and Disposition List), Delivery Call Off, Vendor Managed Inventory (VMI), Advanced Shipping Notification (ASN) and Forecast.</p>
	<p>Quality</p>	<p>Complaints</p>
	<p>Administration</p>	<p>User Management</p>

2.2.2 Dashboard

The dashboard provides quick access to the most essential information, and allows you to quickly view the open, current, and recent processes.

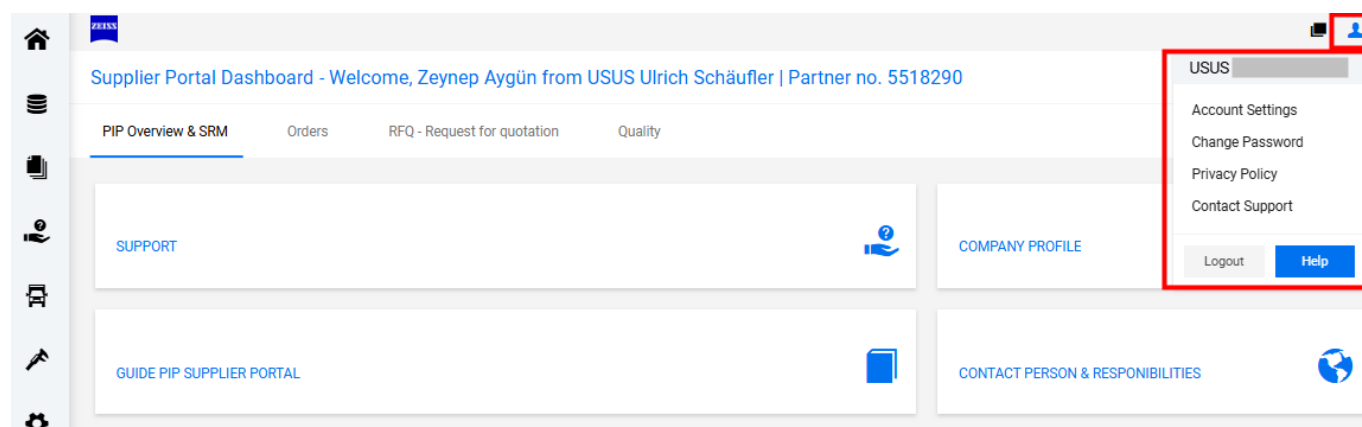


The dashboard is divided into several tabs (**bold** information is available only from the dashboard):

Name	Description
PIP Overview & SRM	Support, ZEISS Supplier Portal Manual, News, Actions, Company Profile, Contact Person & Responsibilities, Supplier Evaluation, Document Exchange, PIP Download Area
Orders	Order List, Not Opened Orders, Not Confirmed Orders, Retrievable Documents for PO's (Web-FTP) , Confirmed Orders, Partially Confirmed Orders, Disposition List, Shipping Note Created, Not Advised, Advised Orders
RFQ - Request for quotation	Running RFQs, Retrievable Documents for RFQ's (Web-FTP) , Checking RFQs, RFQ Overview, Completed RFQs
Quality	Create New Ticket - Special Release / Change Request / Initial Sample Inspection, My Tickets, All Tickets, Complaint Overview

2.2.3 User Menu

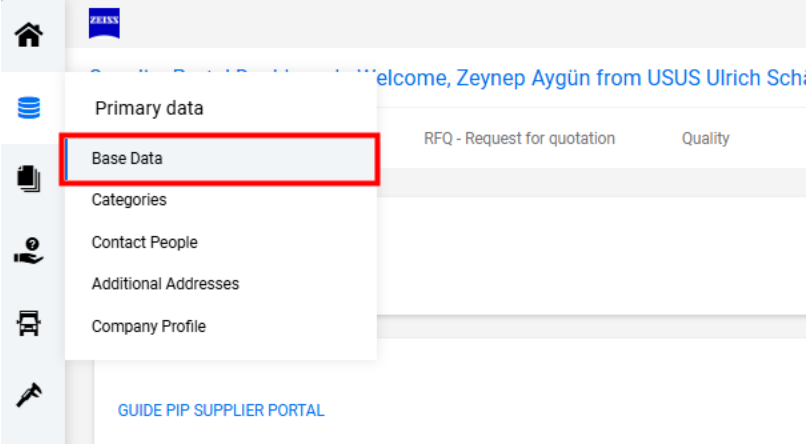
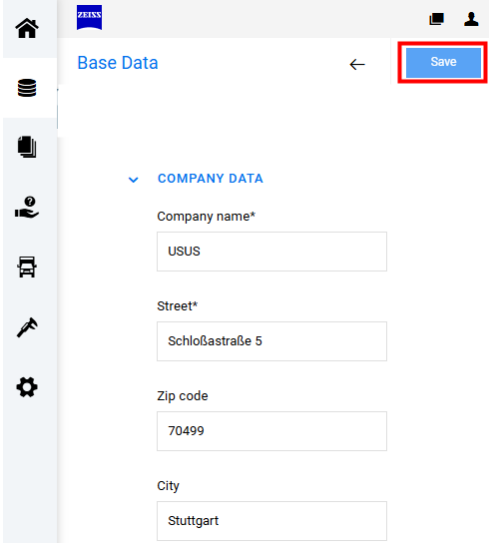
The user menu (Toolbar) can be opened from the  icon in the upper-right corner of the dashboard.



The following functions are available from the user menu:

Name	Description
Account Settings	Edit your user data: First name, Last name, Telephone, Mobile, E-Mail, Main Language, Format, Timezone.
Change Password	Change the password for your account here.
Privacy Policy	Displays the privacy statement in the following languages: Arabic, Chinese, German, English, Spanish, Italian, Japanese, Dutch, Polish, Portuguese, and Brazilian Portuguese.
Contact Support	You will be redirected to the Supplier Support Request of JAGGAER Support. If you have a problem or have questions about the application, enter the necessary information in the form.
Help	This will open the JAGGAER Help Center. There you will get more standard information about each module.
Logout	Logout from the application.

2.3 Change Company Data

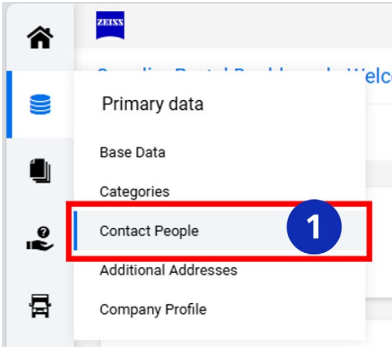
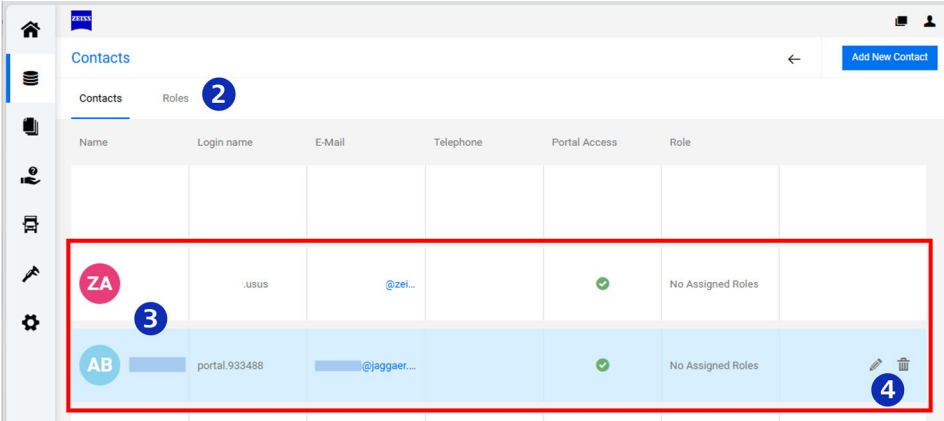
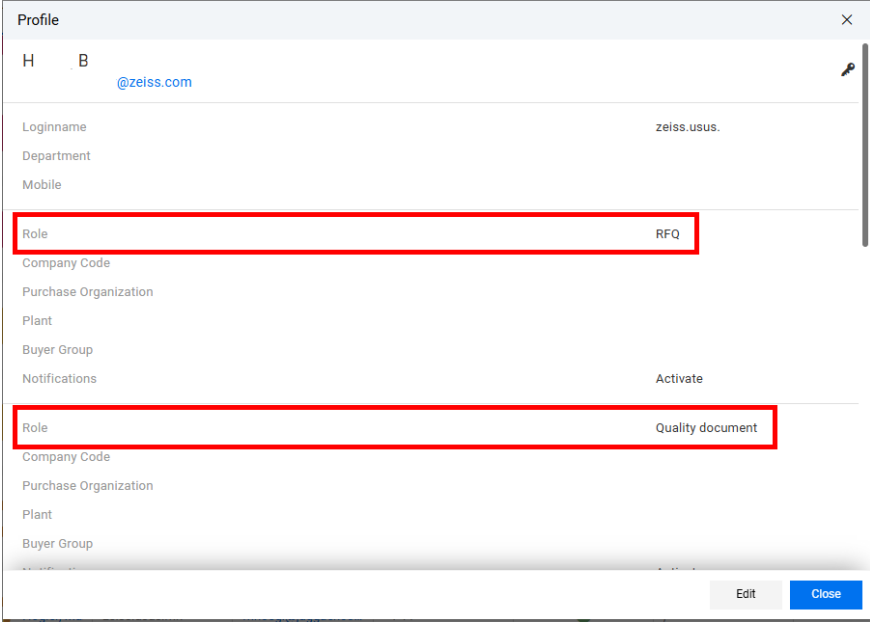
Instruction	View
<p>1. Open the Base Data.</p>	 <p>The screenshot shows the ZEISS portal interface. A navigation menu on the left contains several options: Home, Primary data, Base Data (highlighted with a red box), Categories, Contact People, Additional Addresses, and Company Profile. The main content area shows a welcome message for Zeynep Aygün from USUS Ulrich Sch... and a section for RFQ - Request for quotation with a Quality button. At the bottom, there is a link for GUIDE PIP SUPPLIER PORTAL.</p>
<p>2. Modify the necessary information.</p> <p>3. Save your input.</p>	 <p>The screenshot shows the 'Base Data' form in the ZEISS portal. The form is titled 'Base Data' and has a 'Save' button highlighted with a red box. The form contains the following fields: <ul style="list-style-type: none"> COMPANY DATA (expanded) Company name*: USUS Street*: Schloßstraße 5 Zip code: 70499 City: Stuttgart </p>

2.4 Manage Contacts

As an administrator of your company, you can create, change or delete other contacts in your company. In addition, you can assign different roles and responsibilities in the system to your contacts.

For security and data protection purposes, ensure all data is kept current!

2.4.1 Contact Overview

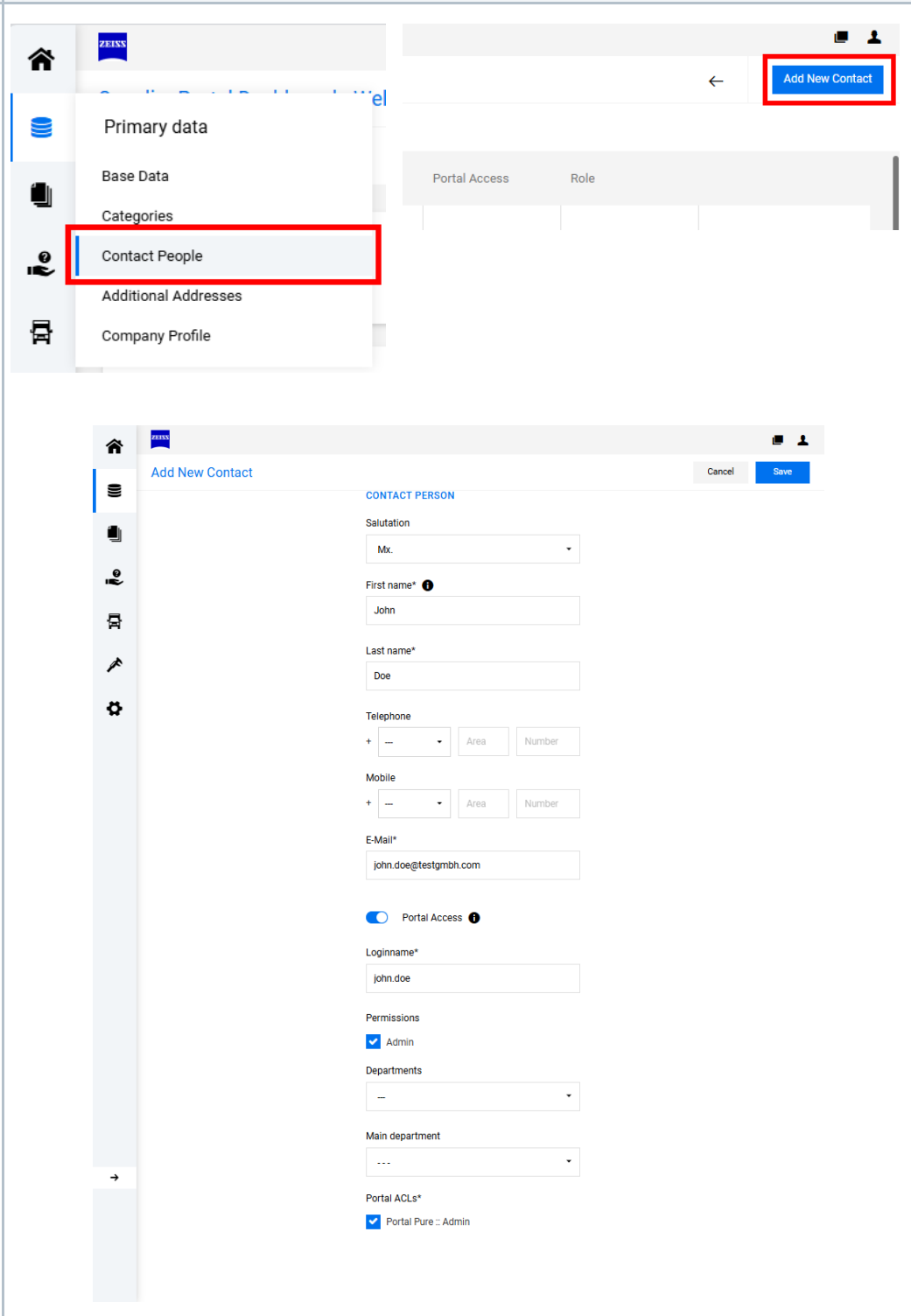
Instruction	View
<ol style="list-style-type: none"> 1. Open "Contact People". 2. You will now see the contacts for your company that are currently being maintained: Name, Login name, E-mail, Telephone, Portal Access, Role. 3. Clicking on the name will give you an overview of all the roles assigned to the contact. 4. By clicking "Edit" you can adjust and save the data of the contact person. 	  

2.4.2 Determine Roles and Responsibilities

Different roles allow you to specify in the system which contact receives the notifications for the respective processes (orders, inquiries, complaints, profile updates, etc.) and can process them.

Instruction	View
<ol style="list-style-type: none"> 1. Open "Contact people". 2. Click "Roles". 3. You will now see the available roles in the system, and the roles assigned to your company contacts. 4. Click the edit icon to assign a defined role to another contact. 5. Change the contact person there or add more responsibilities. 6. Back up your input by clicking "Save". 	<p>Make sure that only contact persons with portal access are stored for roles in which you as a supplier have to enter the system (orders, RFQs complaints, etc.).</p> <ul style="list-style-type: none"> - Please do not alter the additional information displayed, such as "Company Code" or similar information! - Often, only one contact can be selected for a role.

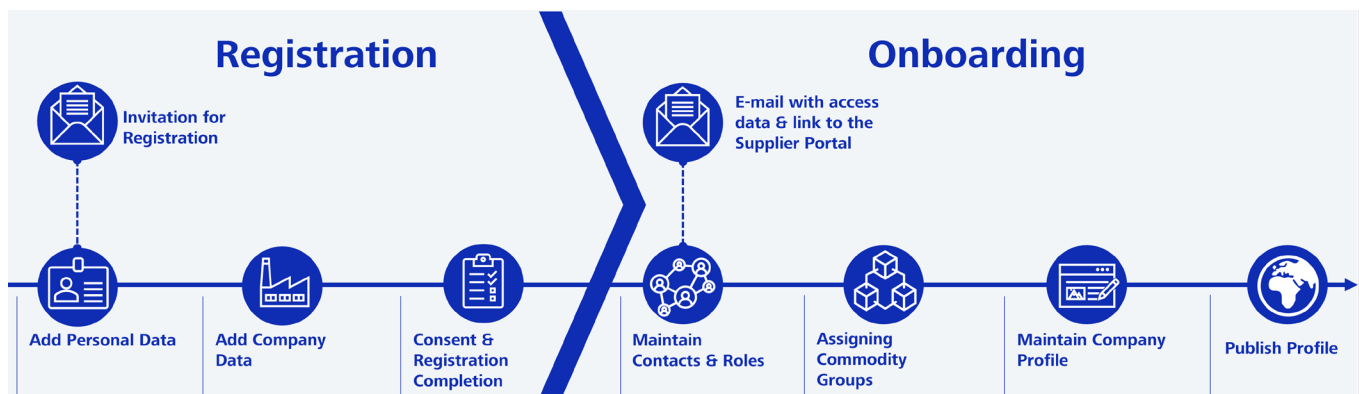
2.4.3 Create Contacts

Instruction	View
<ol style="list-style-type: none"> 1. Open the "Contact People" section. 2. Click "Add New Contact". 3. Maintain the data for the new contact. 4. Decide whether the new contact person should have access to the ZEISS Supplier Portal. If so, select "Portal Account", select a login name. 5. Decide whether the new contact person should have admin permissions. If so, check the box for admin. 6. Check box for the portal permission (Portal ACLs). 7. Click "Save" to create the contact person. 8. Please check the assignment of roles and responsibilities for the new user (→ Determine Roles and Responsibilities). 	 <p>The screenshot displays the 'Add New Contact' form in the ZEISS system. The form includes the following fields and options:</p> <ul style="list-style-type: none"> Salutation: Mx. First name*: John Last name*: Doe Telephone: + [Area] [Number] Mobile: + [Area] [Number] E-Mail*: john.doe@testgmbh.com Portal Access: <input checked="" type="checkbox"/> Portal Access Loginname*: john.doe Permissions: <input checked="" type="checkbox"/> Admin Departments: [Dropdown menu] Main department: [Dropdown menu] Portal ACLs*: <input checked="" type="checkbox"/> Portal Pure :: Admin

3 Supplier Management (SRM)

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3.1 Registration & Onboarding



1. Overview of the Registration and Onboarding Process

The Registration & Onboarding Process is usually the first point of contact with the ZEISS Supplier Portal PIP. As a supplier, you will be invited to register (apply for access) and onboarding (provide general company information) in the system.

For most ZEISS companies, this is a mandatory activity that must be fulfilled by the suppliers, since compliance with legal requirements and internationally recognized standards is also required here.


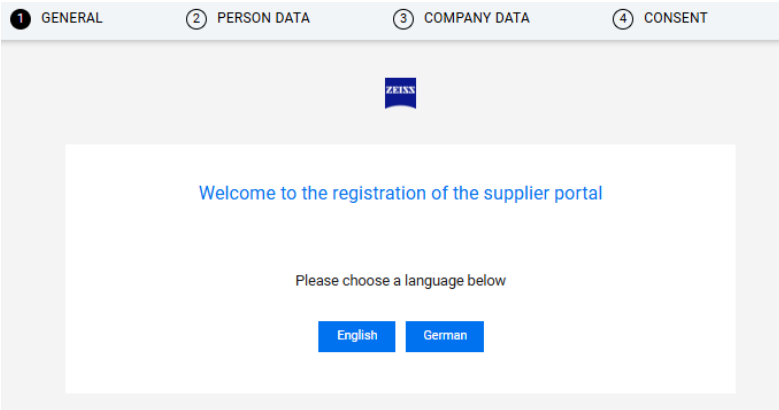
As a supplier, onboarding in the Supplier Portal offers significant advantages:

- The supplier information and supplier profile only need to be maintained centrally at ZEISS.
- The profile you have in place gives you, as a supplier, the opportunity to present yourself at ZEISS and to disclose your entire service portfolio.
- The supplier profiles that have been added are then visible to the entire ZEISS Group.
- Registration in PIP brings up new possibilities for communication and cooperation with ZEISS, optimizes processes and improves the flow of information.
- The information in the supplier profile is used by ZEISS to evaluate the suppliers and to release them for further procurement activities.

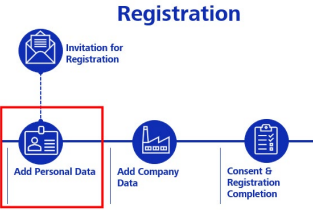
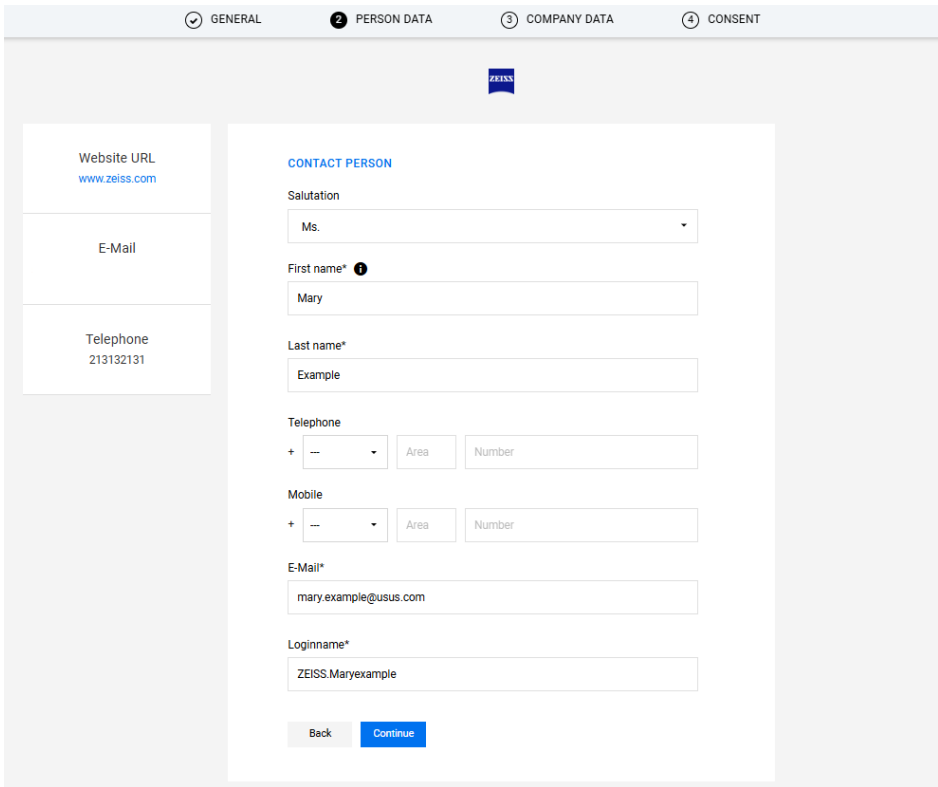
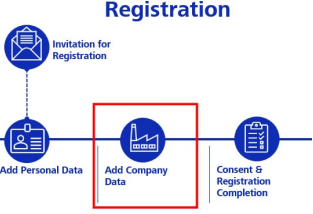
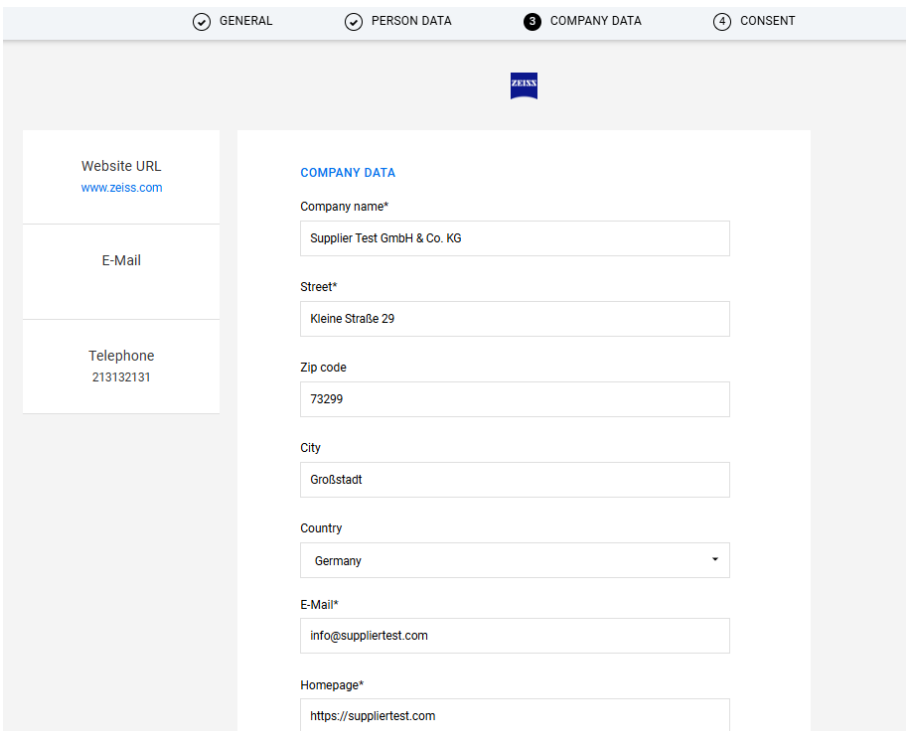
3.1.1 Registration Process

By registering in the ZEISS Supplier Portal PIP, you generate a user account for your company.

Registration Invitation

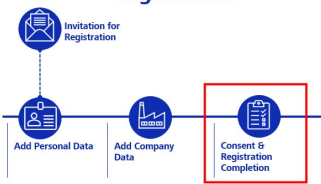
Instruction	View
<p>1. You have received an e-mail invitation to register in the ZEISS Supplier Portal PIP.</p> <p>2. Open the registration link.</p> <p>3. Select a system language.</p> <p>i The e-mail is sent from no-reply@jaggaer.com. Please check your spam folder if the e-mail is not in your mailbox as expected.</p> <p>The e-mail will link to the latest version of the vendor documentation that supports all the processes in the system.</p>	 <p>The diagram shows a process flow from 'Registration' to 'Onboarding'. The Registration phase includes: Add Personal Data, Add Company Data, and Consent & Registration Completion. The Onboarding phase includes: Maintain Contacts & Roles, Assigning Commodity Groups, Maintain Company Profile, and Publish Profile. An email icon with 'Invitation for Registration' is highlighted in a red box, and another email icon with 'E-mail with access data & link to the Supplier Portal' is shown later in the flow.</p> <p style="text-align: center;">ZEISS</p> <p>Invitation to register in the ZEISS supplier portal PIP received</p> <p>Dear [REDACTED]</p> <p>We are very pleased to inform you about the integration of Test Neher in the ZEISS supplier system PIP!</p> <p>PIP (Procurement Interaction Portal) will be used from you as a ZEISS supplier as well as from all ZEISS companies worldwide as a central platform providing all information quickly and clearly. Test Neher is offered here the opportunity to present the complete portfolio, which in turn can be used internally from ZEISS, if certain services or products are searched. Last but not least, digitizing information reduces manual effort and simplifies our business processes on both sides.</p> <p>Please open the link https://app11.jaggaer.com/portals/zeiss/register?crm_person_id=NjQ2Njk1NDM5-28bad1b43fd67360bb9456d17e93d850&l=eng and follow the instructions on the website. Then you will receive your access data and can use the supplier portal.</p> <p>The step-by-step guide on our home page gives you additional support in creating your profile.</p> <p>If you have any questions, feel free to contact us.</p> <p>We thank you for the good cooperation and wish you much success.</p> <p>Best regards,</p> <p>ZEISS Supplier Portal</p> <p>Comment from your responsible ZEISS Contact:</p>  <p>The screenshot shows a registration portal interface with a progress bar at the top: 1 GENERAL (selected), 2 PERSON DATA, 3 COMPANY DATA, 4 CONSENT. Below the progress bar is the ZEISS logo and the text 'Welcome to the registration of the supplier portal'. Underneath, it says 'Please choose a language below' with two buttons: 'English' and 'German'.</p>

Maintain Personal Information


Instruction	View
<p>1. Maintain your personal data and assign yourself a login name:</p> <p>Registration</p> 	
<p>2. Maintain your company's general information:</p> <p>Registration</p> 	

3. Read all the information and documents provided. Agree with the mandatory information.
4. Then click "Accept and Submit" to complete the registration process.

Registration



✓ GENERAL
✓ PERSON DATA
✓ COMPANY DATA
4 CONSENT




To access and use JAGGAER as a supplier, you are required to accept the Supplier Access Terms.

I agree and accept [Supplier Access Terms](#).

To make your profile visible in the JAGGAER Supplier Network for purposes of pursuing business transactions, please indicate your agreement below.

I agree that JAGGAER will use the company and personal data entered in the course of the registration on the supplier portal of Carl Zeiss AG in order to allow all customers of JAGGAER to find your organization via the JAGGAER Supplier Network. You may revoke your agreement and discontinue visibility in the JAGGAER Supplier Network at any time by updating the visibility setting in your company profile.

Back
Accept and Submit

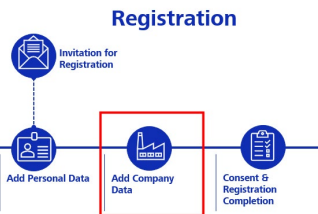
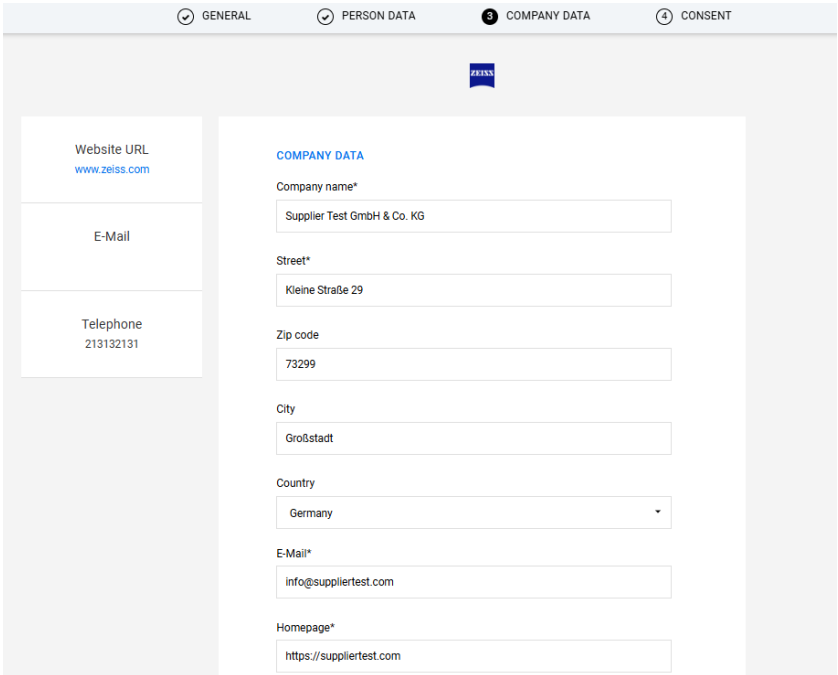


Successful Registration

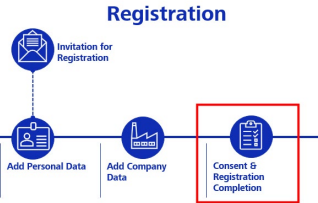
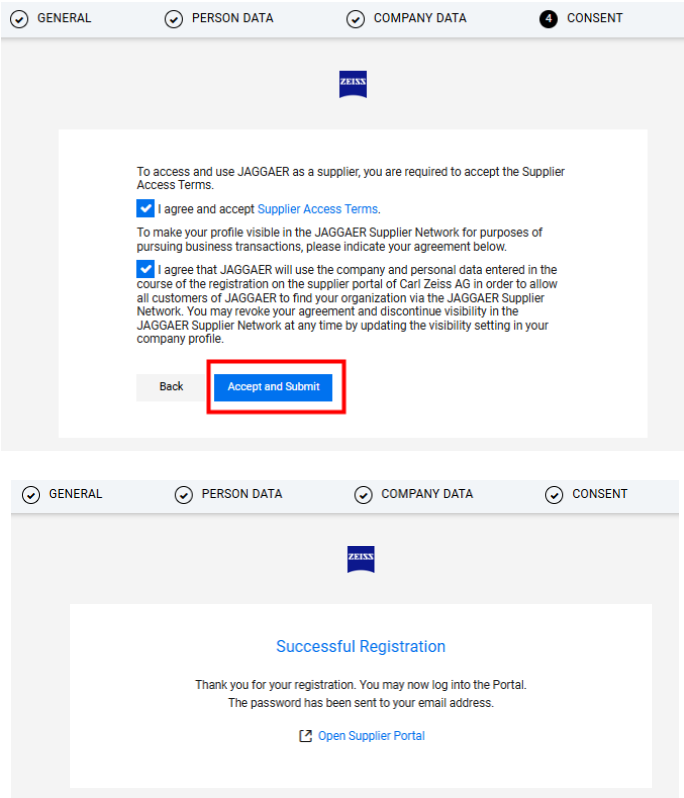
Thank you for your registration. You may now log into the Portal.
The password has been sent to your email address.

[Open Supplier Portal](#)

Specify Company Data

Instruction	View
<p>1. Maintain your company's general information:</p> <p style="text-align: center;">Registration</p> 	

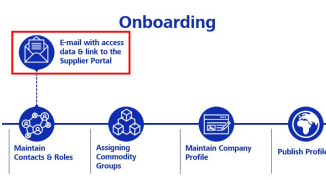
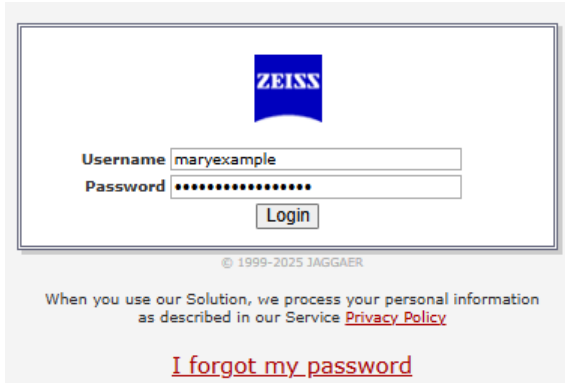
Approval & Completion of Registration

Instruction	View
<p>1. Read all the information and documents provided. Agree with the mandatory information.</p> <p>2. Then click "Accept and submit" to complete the registration process.</p> <p style="text-align: center;">Registration</p> 	

3.1.2 Onboarding Process

The onboarding process is the structured and globally applied procedure at ZEISS to connect suppliers to the Supplier Portal. It is used by ZEISS to obtain general supplier information and to check it with regard to company-wide standards and legal requirements.

E-mail with access data & link to the Supplier Portal

Instruction	View
<ol style="list-style-type: none"> After successful registration you will receive an e-mail with access credentials and the link to the ZEISS Supplier Portal PIP. Open the link to the ZEISS Supplier Portal. Enter your login name and initial password. You will then need to choose your own password. Be aware of the requirements for your new password. Then click "Save". 	<p>Von: no-reply@app11.jaggaer.com <no-reply@app11.jaggaer.com></p> <p>Thank you for your Registration</p> <p>Your login: maryexample Your password: gc(C%eyesAlt1%2ma</p> <p>You can login, by using following link: https://zeissdemo.app11.jaggaer.com/portals/zeiss/</p> <p>Please be shure to update all your data, to become a supplier of us.-----Herzlichen Dank für Ihre Registrierung!</p> <p>Ihr Login: maryexample Ihr Passwort: gc(C%eyesAlt1%2ma</p> <p>Sie können Sich unter folgendem link: https://zeissdemo.app11.jaggaer.com/portals/zeiss/ einloggen.</p> <p>Pflegen Sie danach bitte all Ihre Daten, danach werden Sie in unseren Lieferantenstamm aufgenommen!</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="478 1131 1045 1512" style="border: 1px solid #ccc; padding: 10px; width: 45%;">  </div> <div data-bbox="1077 1131 1452 1568" style="border: 1px solid #ccc; padding: 10px; width: 45%;"> <p>Change Password</p> <p>Your password has expired. Please change it now</p> <p>..... <input type="password"/></p> <p>New password <input type="password"/></p> <p>This field is mandatory</p> <p>Confirm password <input type="password"/></p> <ul style="list-style-type: none"> ✘ Not one of the last 3 passwords ✘ Minimum of 8 characters ✘ Minimum of 1 special character (not A-Z or a-z or 0-9) ✘ Minimum of 1 number ✘ Minimum of 1 lower case letter and 1 upper case letter <p>Password forgotten? <input type="button" value="Save"/> <input type="button" value="Reset"/></p> </div> </div>

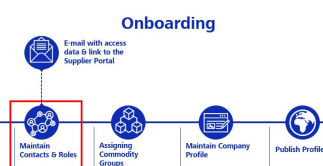
Maintain Contacts & Roles

Instruction	View
<p>1. Click the icon to connect the supplier profile in the red banner to perform the onboarding.</p>	
<p>2. Review the general company data again and then click "Save".</p>	
<p>3. You can now create different contacts for your company and then assign them the appropriate roles and responsibilities.</p>	
<p>4. Click "Add New Contact".</p>	

5. Enter the new contact details.
6. Decide whether the new contact should have access to the ZEISS Supplier Portal. If so, select "Portal Account", select a login name, and select the check box for the portal permission. Click "Save" to create the contact person.

7. Click the icon to assign specific roles/responsibilities to your company contacts.

8. On the left, select a role to reassign. Click the icon and select the contact person to take over the role. Click "Save" to confirm your entry.
9. Click "Continue" after you have created all contacts and assigned roles.



Assigning Commodity Groups

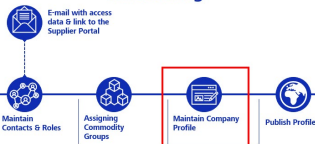
Instruction	View
<p>1. Select the commodity groups that you have in your portfolio and can deliver to ZEISS. Then click "Continue".</p>	

Maintain Company Profile

Instruction	View
<p>1. Now maintain the data in all tabs of the company profile.</p> <p>2. The yellow box will show you in which tabs unanswered fields are mandatory.</p> <p>3. Then click on "Save" to take you to the next tab with unanswered fields.</p>	
<p>4. If you want to save a page without having filled in all the mandatory information, a notice will appear in red. In addition, unanswered fields are highlighted in red.</p>	

5. If all mandatory fields are filled in, a notice in green appears that all mandatory fields are filled, and the profile can now be "Published".

Onboarding



Do you have QMS (Qualitymanagementsystem) certificates?*	since	valid until	certificate no.	
QMS ISO 9001	2025-03-01	2028-02-29	4752	Datei auswählen Keine Datei ausgewählt
DIN EN 9100				Datei auswählen Keine Datei ausgewählt
ISO 13485				Datei auswählen Keine Datei ausgewählt
IATF 16949				Datei auswählen Keine Datei ausgewählt

Publication of the Profile

Instruction

- To complete onboarding and submit your profile to ZEISS for review, please click on "Publish".
- Your profile will now be checked by ZEISS. No changes to the profile are possible while the profile is being checked.
- Completion of the onboarding process: If the information is complete and correct, ZEISS can release the profile, and you will receive a success report via e-mail.

Onboarding



View

Von: <no-reply@app11.jaggaer.com>

Betreff: ZEISS Supplier Portal PIP : Release of your company profile / ZEISS Lieferantenportal PIP : Freigabe Ihres Unternehmensprofils



Congratulations! The company profile of Test GmbH 1 has been approved.

Dear Sir or Madam,

You have successfully completed the registration and onboarding process at ZEISS. Remember to keep your profile up to date.

All other functions of the ZEISS supplier portal PIP can be found in our [Supplier Documentation](#).

Details:

[Link to the Supplier Portal PIP](#)

Businesspartner: Test GmbH 1

If you have any questions, please do not hesitate to contact me.

We thank you for the good cooperation and wish you lots of success.

Best regards

Your ZEISS Supplier Portal

Comment from your ZEISS contact:

This message was created automatically. You can reply directly to this e-mail if you have any questions.

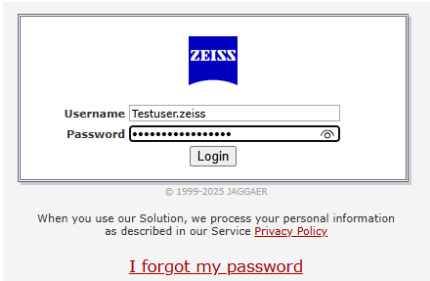
3.2 Company Profile Update

The structure of the company profile is constantly adapted to current ZEISS and legal requirements. Therefore, you will receive a reminder every year to update the company profile and fill in new mandatory fields. In addition, ZEISS employees can also request an update of the company profile and, if necessary, activate special questionnaires for your company profile.

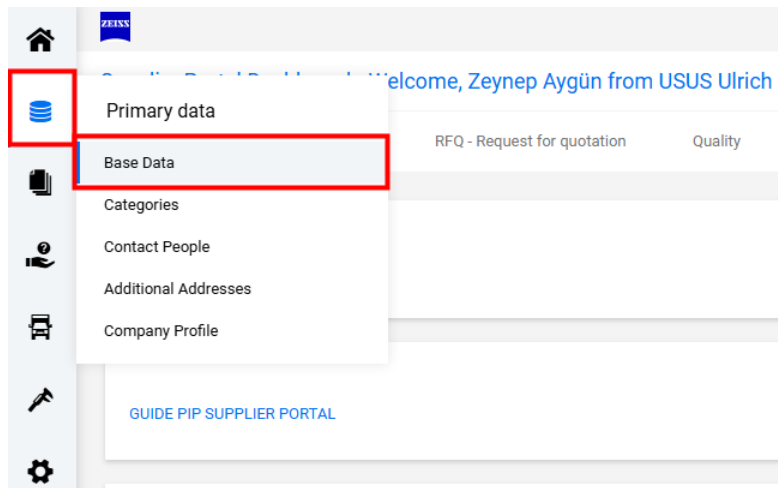
Please follow these steps when updating your company profile:



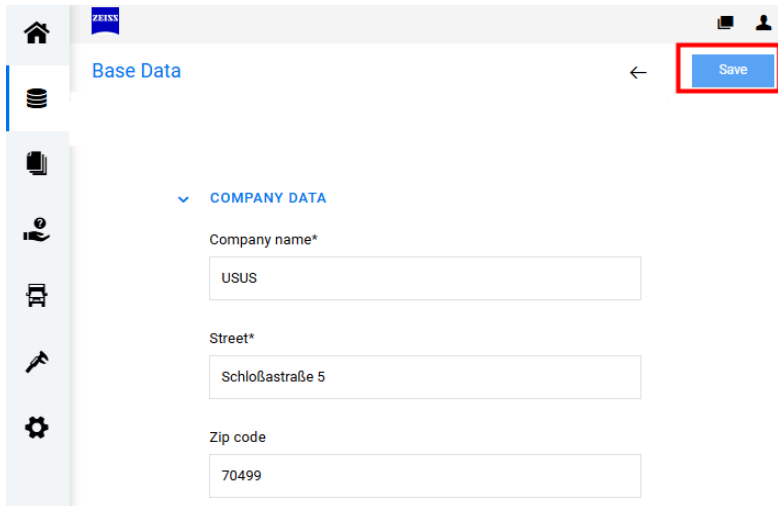
2. How to update the Business Profile

Instruction	View
<ol style="list-style-type: none"> 1. Open the ZEISS Supplier Portal PIP. 2. Log in with your existing user account. 	 <p>The screenshot shows the login interface for the ZEISS Supplier Portal. It features the ZEISS logo at the top, followed by a 'Username' field containing 'Testuser.zeiss' and a 'Password' field with masked characters. A 'Login' button is positioned below the password field. At the bottom of the login area, there is a copyright notice '© 1999-2025 JAGGAER' and a privacy statement: 'When you use our Solution, we process your personal information as described in our Service Privacy Policy'. A red link for 'I forgot my password' is located at the bottom of the page.</p>

3. Open your company's base data.



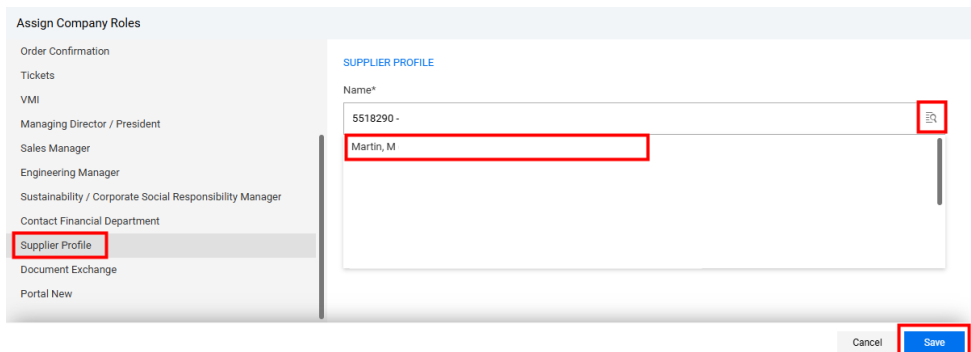
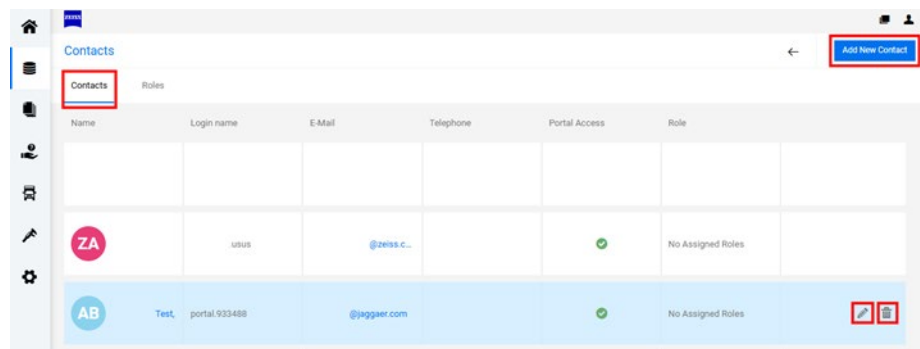
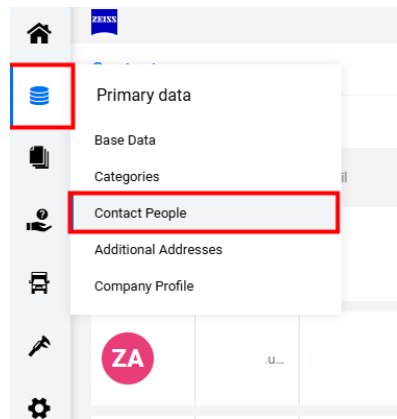
4. Review the base data and confirm your customizations by clicking "Save".



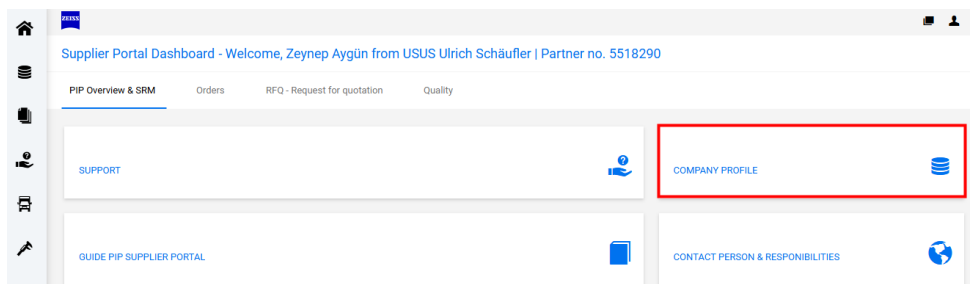
5. Open your company's contacts.
6. Check the contacts that are currently available. If necessary, delete existing contacts from the ZEISS Supplier Portal, modify existing contacts or add new contacts.
7. Check the roles/responsibilities of the currently available contacts in the ZEISS Supplier Portal and reassign them if necessary.



To prevent misuse of data, ensure that only employees of your company have access to the ZEISS Supplier Portal.



8. Open the company profile.



9. Check in which tabs new mandatory fields must be filled in and fill them in.
10. Check the validity of the currently uploaded certificates. If you no longer have a previously uploaded certificate, be sure to delete the expired certificate from the system. Otherwise, you will be prompted to update the expired certificate periodically.

The screenshot shows the 'Profile' page with the 'IT-Security' tab selected. A red error banner at the top states: "You did not fill out all mandatory fields, please do so to be able to save the profile." Below this, a yellow banner says "The profile has already been finished!". The main content area is titled "Supply Chain Security (ISMS)" and contains a table with 10 rows of security questions, each with a dropdown menu.

Supply Chain Security	
1	Is your information Security Management System (ISMS) standardized according to ISO27001, TISAX or a similar standard?*
1.1	
2	Is your access to confidential and secret ZEISS information regulated and procedurally/systemically managed?*
3	Are encryption mechanisms implemented for confidential and secret ZEISS information?*
4	Are physical security and access controls in place for areas containing confidential or secret ZEISS information and/or devices (with direct access) that are critical to the provision of contracted services and products to ZEISS?*
5	Is logging and monitoring of access to information systems that affect the delivery of services or products implemented?*
6	Is vulnerability management (software solutions) in place to protect against malware, malicious code (viruses, trojans, spyware, etc.) and other potential IT system attacks?*
7	Is the data transfer of confidential ZEISS information over internal and external networks continuously controlled and monitored, and protected by security gateways (e.g. firewalls)? *
8	Are processes in place to handle information security incidents?*
9	Are backups of business-critical data performed on a regular basis, and are measures to ensure availability in place?*
10	Is there a password policy in place that provides guidance regarding password strength and handling?*

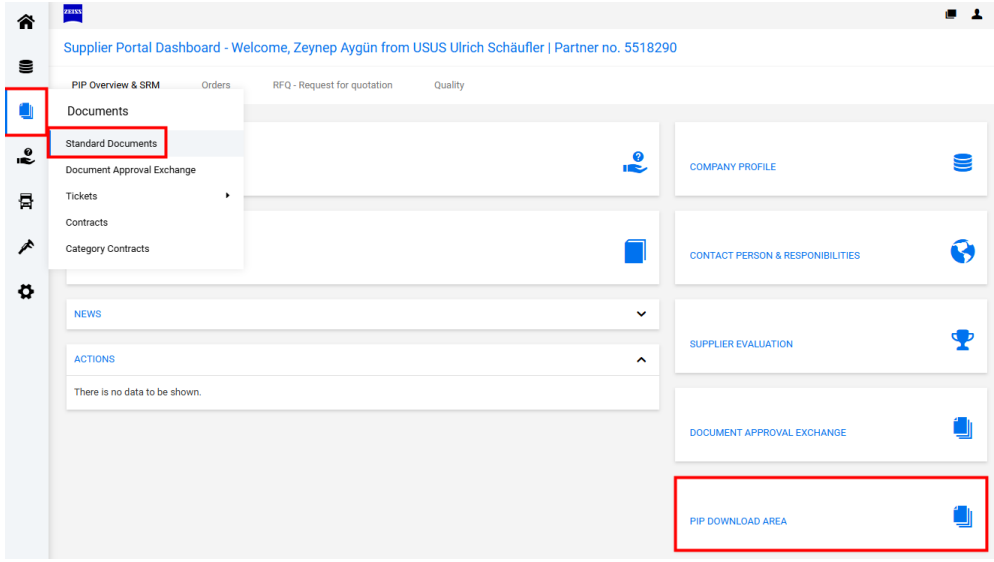

11. After you have checked all data and areas of the company profile, it is imperative that you "publish" your profile to make the changes in ZEISS visible.

The screenshot shows the 'Profile' page with the 'IT-Security' tab selected. A green success banner at the top states: "Successfully saved!". The 'Publish' button in the top right corner is highlighted with a red box. The main content area is titled "Supply Chain Security (ISMS)" and contains a table with 10 rows of security questions, each with a dropdown menu.

Supply Chain Security	
1	Is your information Security Management System (ISMS) standardized according to ISO27001, TISAX or a similar standard?*
1.1	
from	valid to
2025-03-28	2026-03-28
Norm	546
ISO Certificate ISO 27001 USUS.pdf	

3.3 Standard Documents

ZEISS provides additional documents to all suppliers who have access to the ZEISS Supplier Portal.

Instruction	View
<p>1. In the navigation, click on "Requests" and then on "Standard Documents".</p> <p>Alternative:</p> <p>1. On the dashboard in the tab "PIP General & SRM" on the link "PIP Download Area"</p>	
<p>2. All generally available documents per division of ZEISS are displayed. The plus symbol allows you to open the individual areas and then the documents below them</p>	

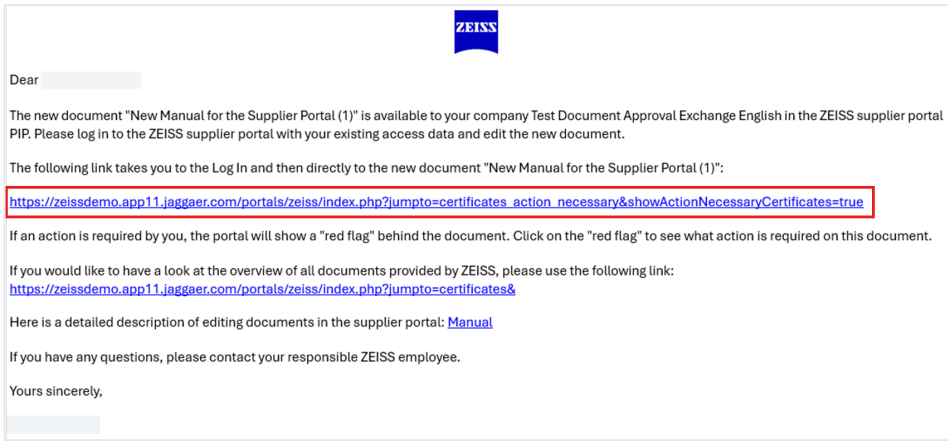
3.4 Document Approval Exchange (DAE)

Document Approval Exchange (DAE) is a module within PIP that enables efficient document exchange with suppliers. It supports document approval and management, including revision, updating, and distribution of documents, and it documents all steps centrally.

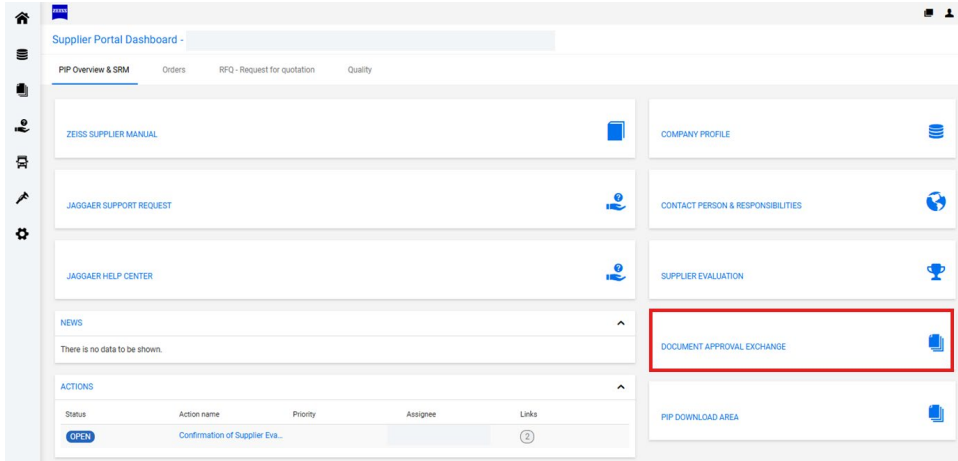
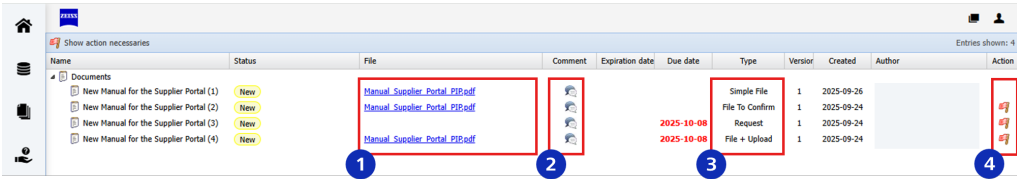
Benefits of DAE for ZEISS Suppliers:

- **Up-to-date Information:** Suppliers receive the latest information about ZEISS and procurement first through PIP-DAE.
- **Centralized Document Provision:** Necessary documents are visible to all ZEISS departments and only need to be provided centrally in DAE once.
- **Versioning:** Both suppliers and ZEISS can version documents and inform business partners about changes.
- **Transparency:** Suppliers have a clear overview of all exchanged documents with ZEISS.
- **Optimized Communication:** Using DAE through PIP strengthens communication and cooperation with ZEISS, optimizes processes, and improves information flow.
- **Supplier Evaluation:** Information in DAE is partially used by ZEISS to evaluate suppliers and release them for further procurement activities.

3.4.1 Open Document Exchange

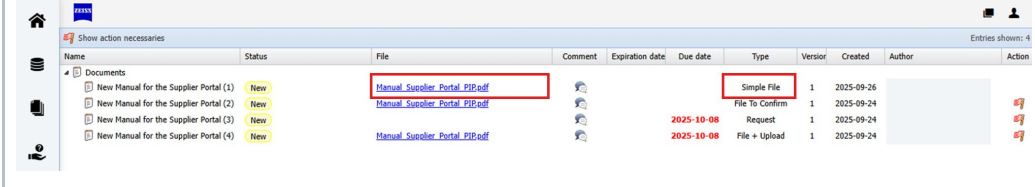
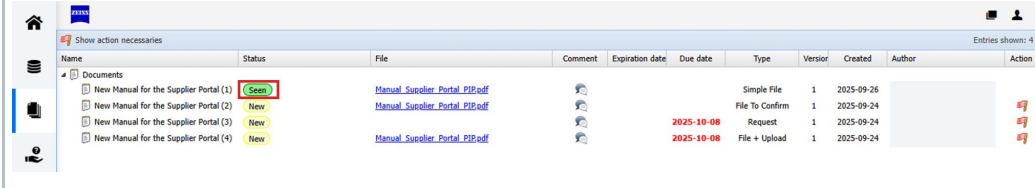
Instruction	View
<ol style="list-style-type: none"> 1. You will receive an e-mail notification with a direct link to the document. 2. Click on the link. You will be redirected to the login. 3. Enter your login details. 4. After successful login, you will be redirected directly to the document. 	 <p>The screenshot shows an email notification with the ZEISS logo at the top right. The text reads: "Dear [redacted], The new document 'New Manual for the Supplier Portal (1)' is available to your company Test Document Approval Exchange English in the ZEISS supplier portal PIP. Please log in to the ZEISS supplier portal with your existing access data and edit the new document. The following link takes you to the Log In and then directly to the new document 'New Manual for the Supplier Portal (1)': https://zeissdemo.app11.jaggaer.com/portals/zeiss/index.php?jumpto=certificates_action_necessary&showActionNecessaryCertificates=true If an action is required by you, the portal will show a 'red flag' behind the document. Click on the 'red flag' to see what action is required on this document. If you would like to have a look at the overview of all documents provided by ZEISS, please use the following link: https://zeissdemo.app11.jaggaer.com/portals/zeiss/index.php?jumpto=certificates& Here is a detailed description of editing documents in the supplier portal: Manual If you have any questions, please contact your responsible ZEISS employee. Yours sincerely, [redacted]</p>

Alternative:

Instruction	View																																																																		
<p>1. Click on the "Document Approval Exchange" button on the Dashboard.</p>																																																																			
<p>2. In the overview you will find all DAE processes with the following information:</p> <ul style="list-style-type: none"> 1 Link to the document 2 By clicking on the "speech bubble" you can open the stored comments on the document. 3 File Type 4 By clicking on the "red flag" you can perform the necessary action. 	 <table border="1" data-bbox="507 972 1485 1070"> <thead> <tr> <th>Name</th> <th>Status</th> <th>File</th> <th>Comment</th> <th>Expiration date</th> <th>Due date</th> <th>Type</th> <th>Version</th> <th>Created</th> <th>Author</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>Documents</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>New Manual for the Supplier Portal (1)</td> <td>New</td> <td>Manual_Supplier_Portal_PIP.pdf</td> <td></td> <td></td> <td></td> <td>Simple File</td> <td>1</td> <td>2025-09-26</td> <td></td> <td></td> </tr> <tr> <td>New Manual for the Supplier Portal (2)</td> <td>New</td> <td>Manual_Supplier_Portal_PIP.pdf</td> <td></td> <td></td> <td>2025-10-08</td> <td>File To Confirm</td> <td>1</td> <td>2025-09-24</td> <td></td> <td></td> </tr> <tr> <td>New Manual for the Supplier Portal (3)</td> <td>New</td> <td>Manual_Supplier_Portal_PIP.pdf</td> <td></td> <td></td> <td>2025-10-08</td> <td>Request</td> <td>1</td> <td>2025-09-24</td> <td></td> <td></td> </tr> <tr> <td>New Manual for the Supplier Portal (4)</td> <td>New</td> <td>Manual_Supplier_Portal_PIP.pdf</td> <td></td> <td></td> <td></td> <td>File + Upload</td> <td>1</td> <td>2025-09-24</td> <td></td> <td></td> </tr> </tbody> </table>	Name	Status	File	Comment	Expiration date	Due date	Type	Version	Created	Author	Action	Documents											New Manual for the Supplier Portal (1)	New	Manual_Supplier_Portal_PIP.pdf				Simple File	1	2025-09-26			New Manual for the Supplier Portal (2)	New	Manual_Supplier_Portal_PIP.pdf			2025-10-08	File To Confirm	1	2025-09-24			New Manual for the Supplier Portal (3)	New	Manual_Supplier_Portal_PIP.pdf			2025-10-08	Request	1	2025-09-24			New Manual for the Supplier Portal (4)	New	Manual_Supplier_Portal_PIP.pdf				File + Upload	1	2025-09-24		
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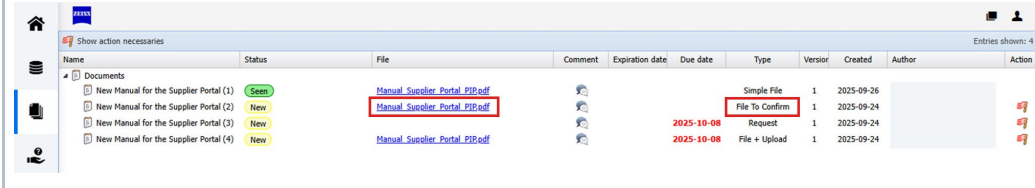
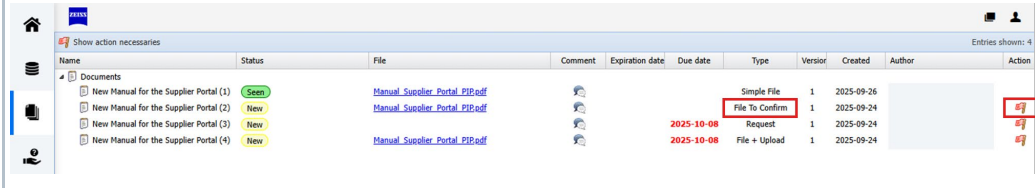
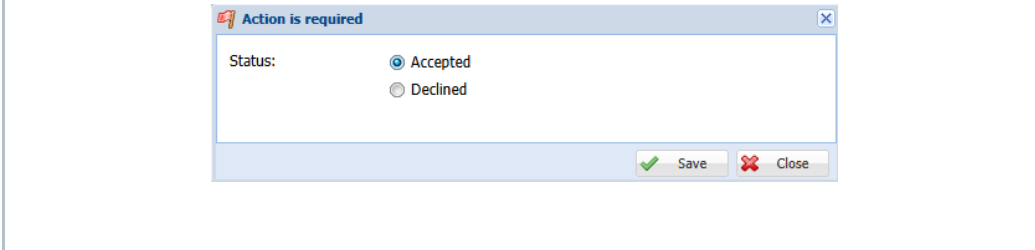
3.4.2 Simple File

A document will be provided on the portal. Please download the document and take note of the document. No further actions are necessary.

Instruction	View
1. Click on the link to download the file.	
2. The status then changes to "Seen".	

3.4.3 File To Confirm

A document will be made available for you to download in the portal. You will then have to decide whether to accept (approve) or reject the document.

Instruction	View
1. Click on the link to download the file.	
2. Click on "red flag" to perform the necessary action.	
3. Choose whether you want to accept or reject the document. 4. Click on "Save".	

<p>5. If you reject the document, please enter a reason in the comment field.</p>	
<p>6. If you accept the document, the status will then change to "Accepted by Supplier".</p>	

3.4.4 Request

A document is requested from you as a supplier. If you are able to provide the document, you have the option of uploading it directly to the portal.

Instruction	View
<p>1. Click on the comment to see more information about the requested document.</p>	
<p>2. Click on the "red flag" to upload or reject the requested document.</p>	
<p>3. If you are able to provide the document, select "Send to customer validation".</p> <p>4. Upload document.</p> <p>5. Enter the expiration date. If you don't have an expiration</p>	

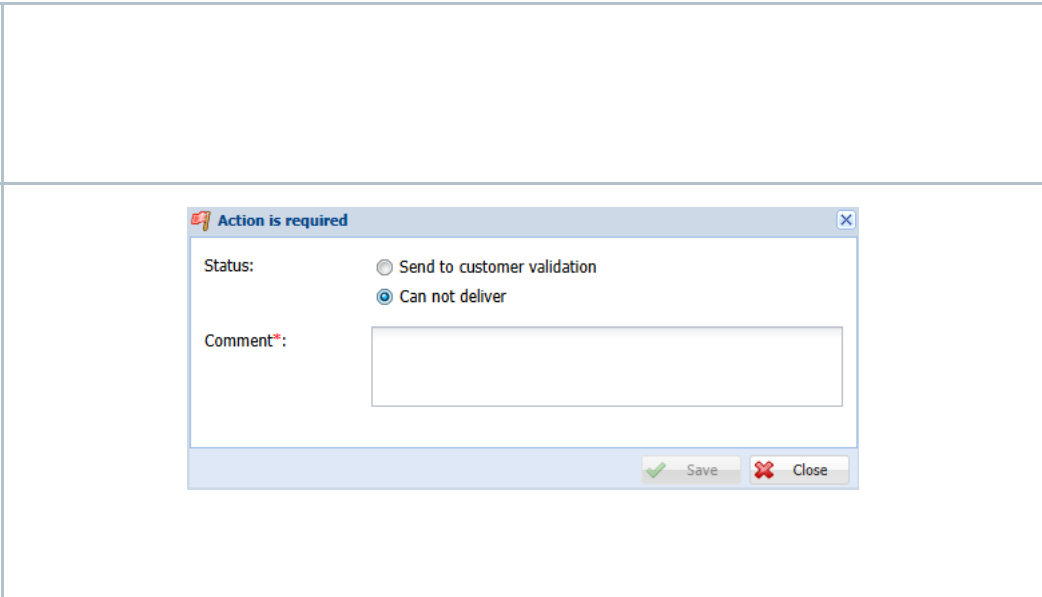
date, then select the current date + 1 year.

6. Save

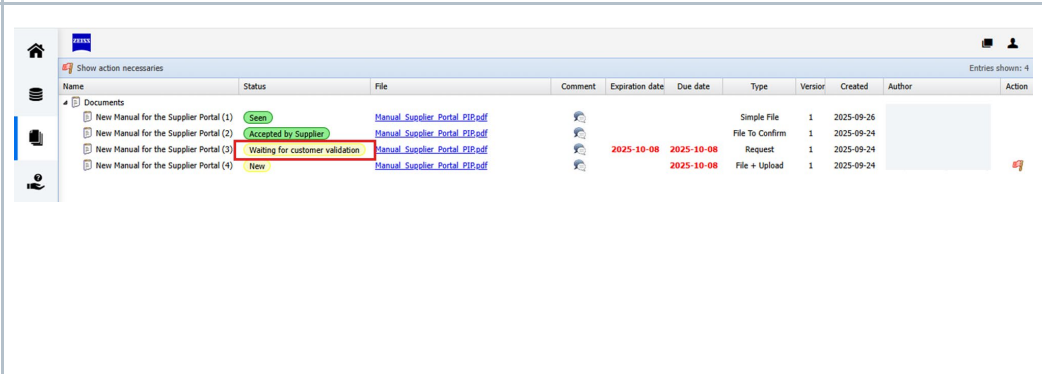
7. If you are unable to provide the document, select "Can not deliver".

8. Please add a comment.

9. Save

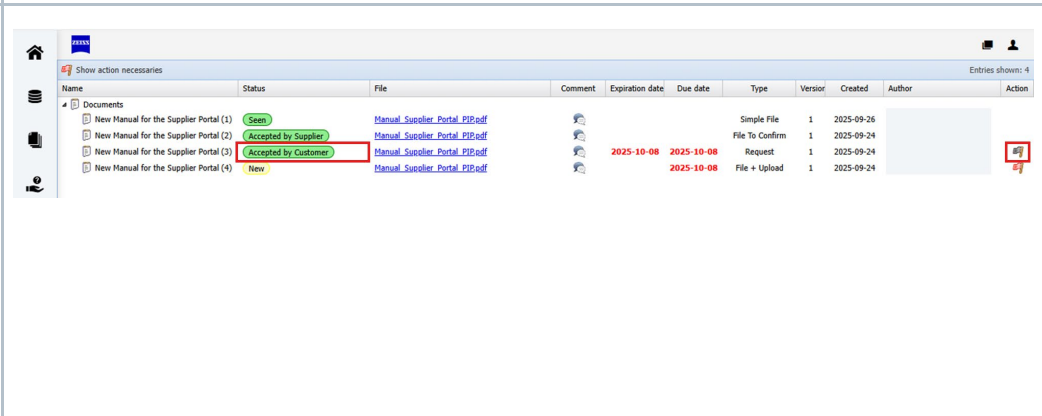


10. After uploading a document, the status changes to "Waiting for customer validation" because the responsible ZEISS employee will check your upload again.



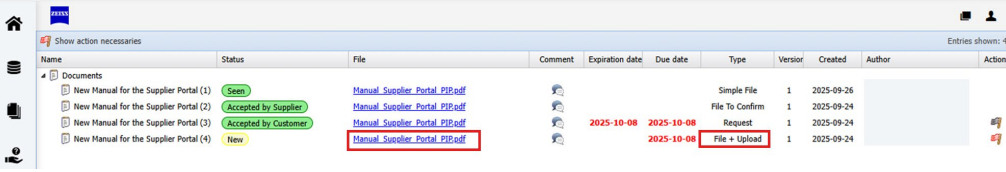
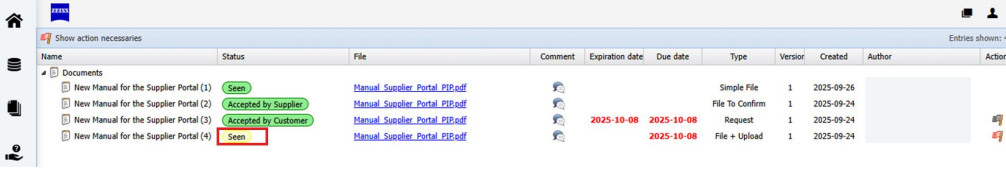
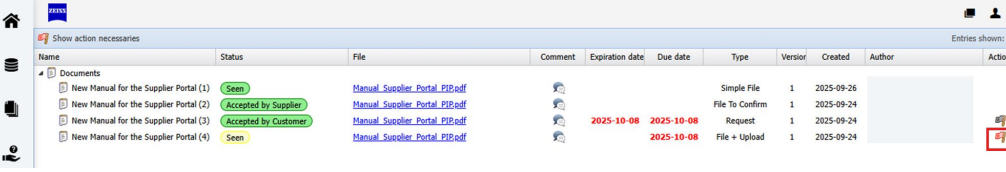
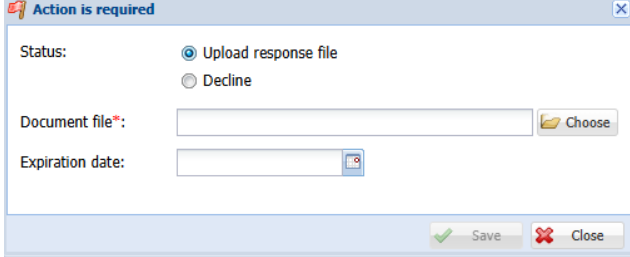
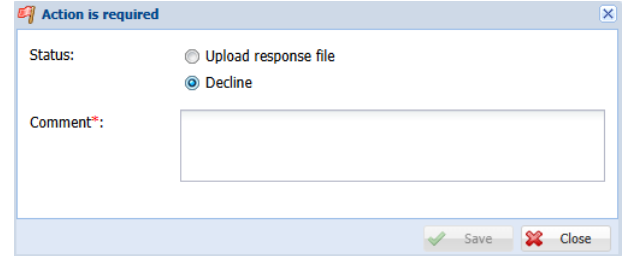
11. When the buyer has reviewed your document, the status changes to "Accepted by Customer".

12. The flag turns black and the exchange process is completed.

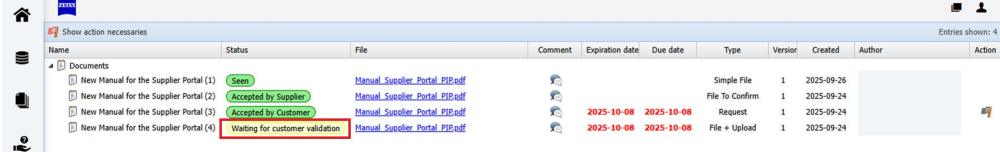


3.4.5 File + Upload

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

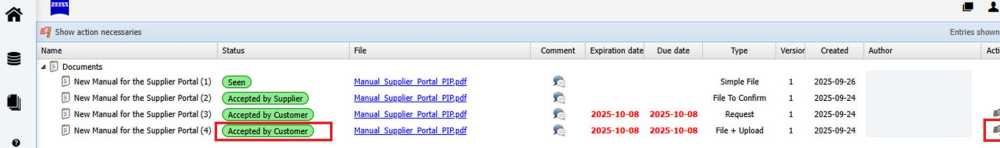
Instruction	View
<p>1. Click on the link to download the file.</p>	
<p>2. The status then changes to "Seen".</p>	
<p>3. Click on "red flag" to perform the necessary action.</p>	
<p>4. If you are able to provide the document (signed/edited), select "Upload response file".</p> <p>5. Upload document.</p> <p>6. Enter the expiration date. If you don't have an expiration date, then select the current date + 1 year.</p> <p>7. Save</p>	
<p>8. If you can't provide the document, select "Decline". Please add a comment.</p> <p>9. Save</p>	

10. After uploading a document, the status changes to "Waiting for clarification with buyer" because the responsible ZEISS employee will check your upload again.



Name	Status	File	Comment	Expiration date	Due date	Type	Version	Created	Author	Action
New Manual for the Supplier Portal (1)	Seen	Manual_Supplier_Portal_P1P.pdf				Simple File	1	2025-09-26		
New Manual for the Supplier Portal (2)	Accepted by Supplier	Manual_Supplier_Portal_P1P.pdf				File To Confirm	1	2025-09-24		
New Manual for the Supplier Portal (3)	Accepted by Customer	Manual_Supplier_Portal_P1P.pdf		2025-10-08	2025-10-08	Request	1	2025-09-24		
New Manual for the Supplier Portal (4)	Waiting for customer validation	Manual_Supplier_Portal_P1P.pdf		2025-10-08	2025-10-08	File + Upload	1	2025-09-24		

11. When the buyer has reviewed your document, the status changes to "Accepted by Customer".

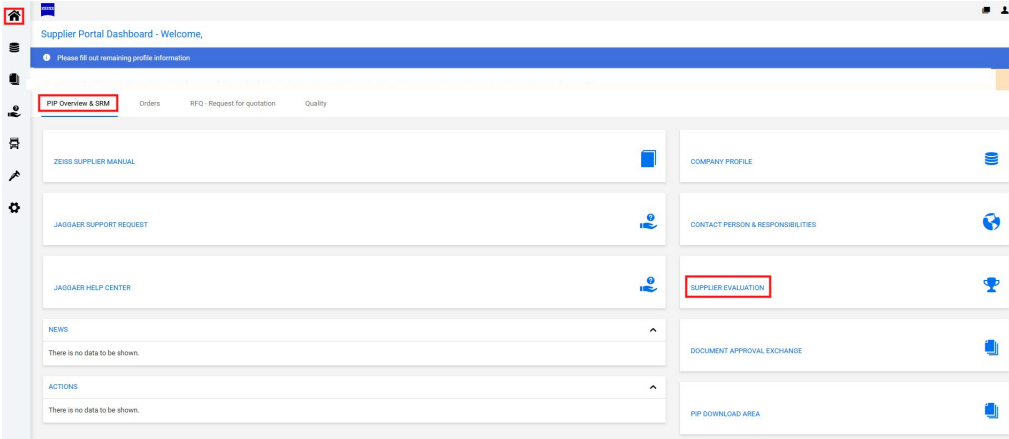
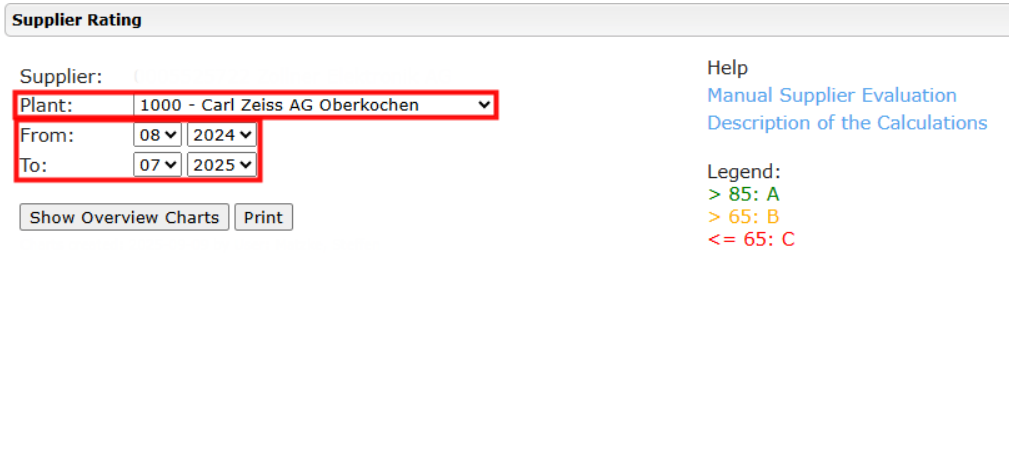


Name	Status	File	Comment	Expiration date	Due date	Type	Version	Created	Author	Action
New Manual for the Supplier Portal (1)	Seen	Manual_Supplier_Portal_P1P.pdf				Simple File	1	2025-09-26		
New Manual for the Supplier Portal (2)	Accepted by Supplier	Manual_Supplier_Portal_P1P.pdf				File To Confirm	1	2025-09-24		
New Manual for the Supplier Portal (3)	Accepted by Customer	Manual_Supplier_Portal_P1P.pdf		2025-10-08	2025-10-08	Request	1	2025-09-24		
New Manual for the Supplier Portal (4)	Accepted by Customer	Manual_Supplier_Portal_P1P.pdf		2025-10-08	2025-10-08	File + Upload	1	2025-09-24		

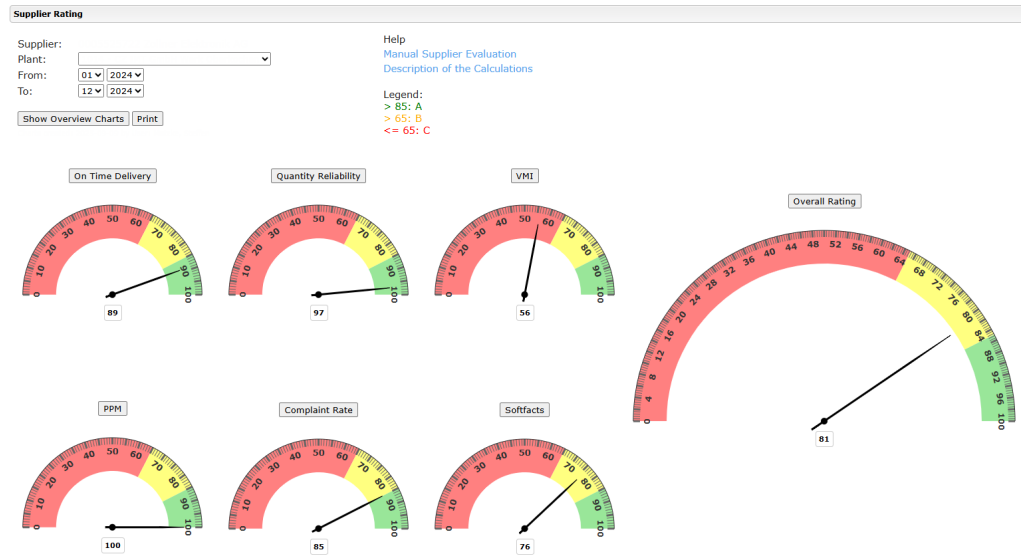
12. The flag turns black and the exchange process is completed.

3.5 Supplier evaluation

If the interface for the supplier evaluation has been set up on the ZEISS side, the supplier rating can be viewed in the supplier portal.

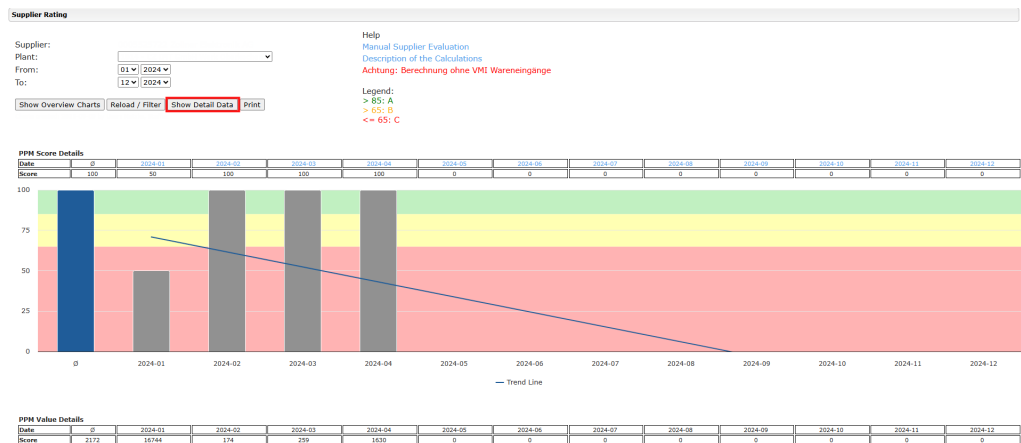
Instruction	View
<p>1. To access the supplier evaluation, click on the "Supplier Evaluation" box in the "PIP General & SRM" tab on the start page.</p>	
<p>2. Now you can select the desired plant from the drop-down menu.</p> <p>3. You can also select the time period for which you want to see the rating.</p> <p>4. Click on "Show Overview Charts" to load the chart.</p>	

5. You will receive an overview of all criteria for which an assessment is available.



6. Click on the headings to view details of the ratings.

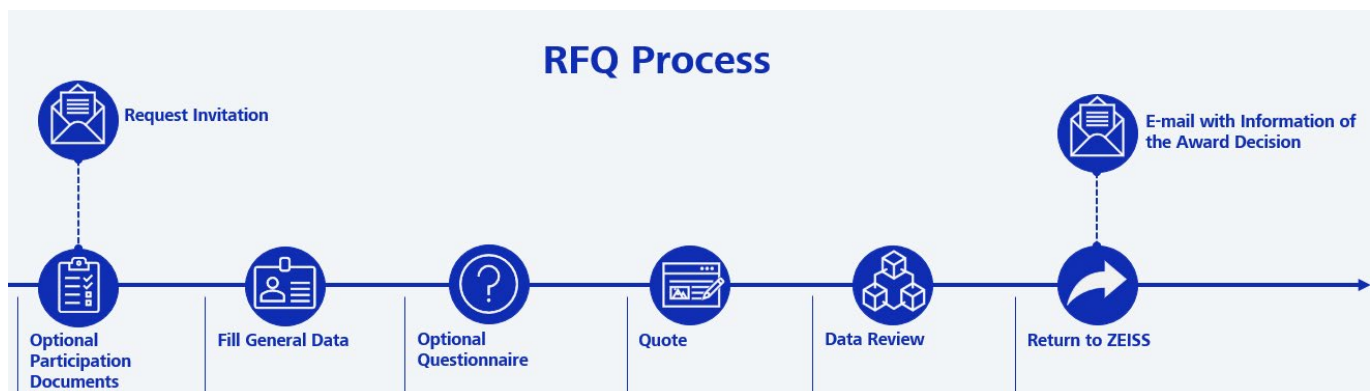
7. There are different levels of detail – by clicking on “Show Detail Data,” you can jump to individual deliveries, etc., if necessary.



4 Request for Tender and Inquiries (RFQ)

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4.1 Process Diagram



3: Overview of the RFQ Process

If you are invited to participate in a request, Request for Quotation (RFQ), you will receive an e-mail with information such as

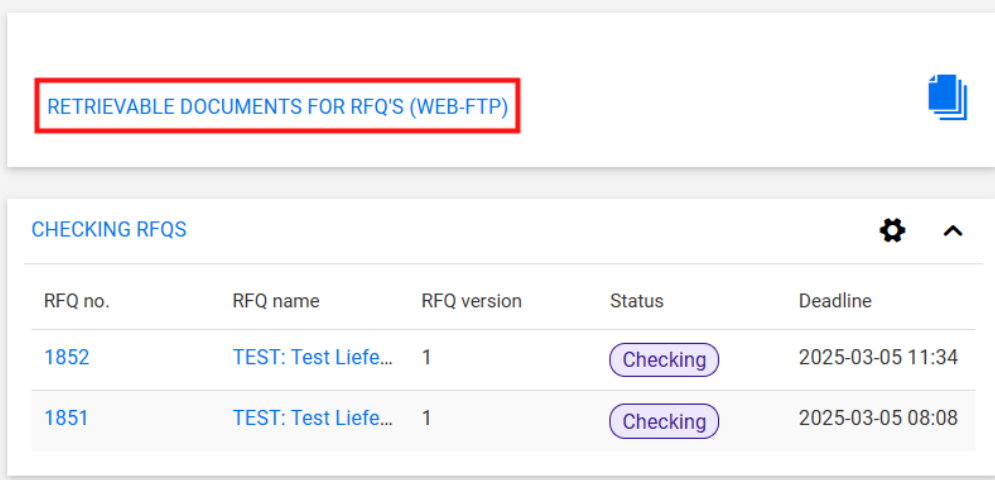
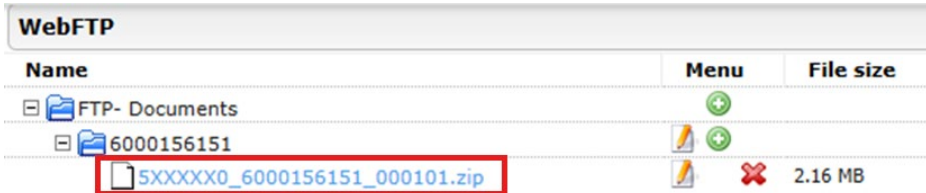
- offer period
- item summary
- direct link to RFQ

If you already have an account, you can navigate directly to the RFQ via the link. Otherwise, the access credentials in the e-mail will be sent to you.

4.2 Portal Overview

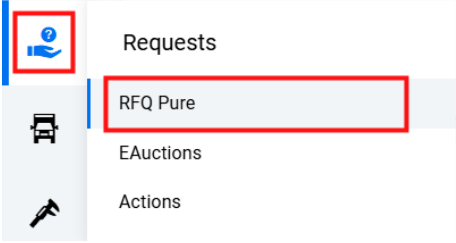

Instruction	View															
<p>1. On the dashboard of the Supplier Portal, you will find all important topics for this module under the tab "RFQ – Request for Quotation".</p>																
<p>2. The running RFQs can be found on the left side. Here you can jump directly into a request.</p>	<table border="1"> <thead> <tr> <th>RFQ no.</th> <th>RFQ name</th> <th>RFQ version</th> <th>Status</th> <th>Deadline</th> </tr> </thead> <tbody> <tr> <td>1859</td> <td>TEST: Test: sup...</td> <td>1</td> <td>Running</td> <td>2025-04-10 15:39</td> </tr> </tbody> </table>	RFQ no.	RFQ name	RFQ version	Status	Deadline	1859	TEST: Test: sup...	1	Running	2025-04-10 15:39					
RFQ no.	RFQ name	RFQ version	Status	Deadline												
1859	TEST: Test: sup...	1	Running	2025-04-10 15:39												
<p>3. The requests with status "Checking" can be found directly below. Here you can view the inquiries you have offered, but the deadline has not yet expired.</p>	<table border="1"> <thead> <tr> <th>RFQ no.</th> <th>RFQ name</th> <th>RFQ version</th> <th>Status</th> <th>Deadline</th> </tr> </thead> <tbody> <tr> <td>1852</td> <td>TEST: Test Liefe...</td> <td>1</td> <td>Checking</td> <td>2025-03-05 11:34</td> </tr> <tr> <td>1851</td> <td>TEST: Test Liefe...</td> <td>1</td> <td>Checking</td> <td>2025-03-05 08:08</td> </tr> </tbody> </table>	RFQ no.	RFQ name	RFQ version	Status	Deadline	1852	TEST: Test Liefe...	1	Checking	2025-03-05 11:34	1851	TEST: Test Liefe...	1	Checking	2025-03-05 08:08
RFQ no.	RFQ name	RFQ version	Status	Deadline												
1852	TEST: Test Liefe...	1	Checking	2025-03-05 11:34												
1851	TEST: Test Liefe...	1	Checking	2025-03-05 08:08												
<p>4. On the right side you will find an overview of all RFQs. This field is also linked directly.</p> <p>5. On the other hand, you will find all RFQs that have already been completed.</p>	<table border="1"> <thead> <tr> <th>RFQ no.</th> <th>RFQ name</th> <th>RFQ version</th> <th>Status</th> <th>Deadline</th> </tr> </thead> <tbody> <tr> <td>1849</td> <td>TEST: Test Liefe...</td> <td>1</td> <td>Done</td> <td>2025-03-03 10:26</td> </tr> </tbody> </table>	RFQ no.	RFQ name	RFQ version	Status	Deadline	1849	TEST: Test Liefe...	1	Done	2025-03-03 10:26					
RFQ no.	RFQ name	RFQ version	Status	Deadline												
1849	TEST: Test Liefe...	1	Done	2025-03-03 10:26												

If ZEISS transmits documents such as drawings to you with the RFQ, you can access them via the link on the Web-FTP server.

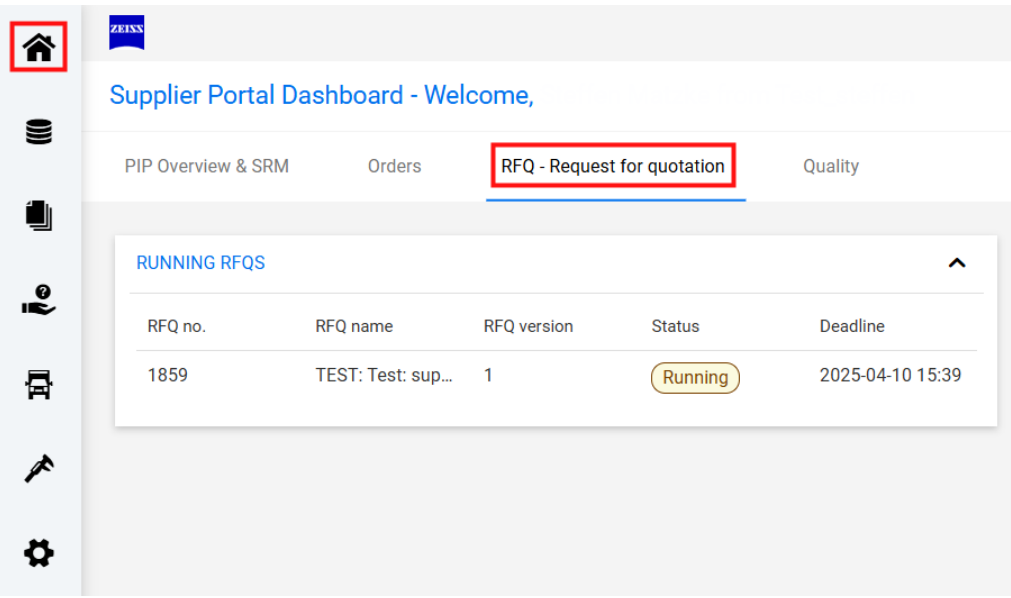
Instruction	View															
<p>1. In the tab "RFQ – Request for Quotation" you will find a link "Retrievable Documents for RFQ's (Web-FTP)".</p>	 <table border="1" data-bbox="496 728 1449 913"> <thead> <tr> <th>RFQ no.</th> <th>RFQ name</th> <th>RFQ version</th> <th>Status</th> <th>Deadline</th> </tr> </thead> <tbody> <tr> <td>1852</td> <td>TEST: Test Liefe...</td> <td>1</td> <td>Checking</td> <td>2025-03-05 11:34</td> </tr> <tr> <td>1851</td> <td>TEST: Test Liefe...</td> <td>1</td> <td>Checking</td> <td>2025-03-05 08:08</td> </tr> </tbody> </table>	RFQ no.	RFQ name	RFQ version	Status	Deadline	1852	TEST: Test Liefe...	1	Checking	2025-03-05 11:34	1851	TEST: Test Liefe...	1	Checking	2025-03-05 08:08
RFQ no.	RFQ name	RFQ version	Status	Deadline												
1852	TEST: Test Liefe...	1	Checking	2025-03-05 11:34												
1851	TEST: Test Liefe...	1	Checking	2025-03-05 08:08												
<p>2. Open the folder of the RFQ via the "plus" symbol.</p> <p>3. Click on the file to download it.</p> <p>Note: The documents are only available for 10 days.</p>	 <table border="1" data-bbox="507 1093 1437 1234"> <thead> <tr> <th>Name</th> <th>Menu</th> <th>File size</th> </tr> </thead> <tbody> <tr> <td>FTP- Documents</td> <td>+</td> <td></td> </tr> <tr> <td>6000156151</td> <td>+</td> <td></td> </tr> <tr> <td>5XXXXX0_6000156151_000101.zip</td> <td>📄 ✖</td> <td>2.16 MB</td> </tr> </tbody> </table>	Name	Menu	File size	FTP- Documents	+		6000156151	+		5XXXXX0_6000156151_000101.zip	📄 ✖	2.16 MB			
Name	Menu	File size														
FTP- Documents	+															
6000156151	+															
5XXXXX0_6000156151_000101.zip	📄 ✖	2.16 MB														

4.3 RFQ Guide

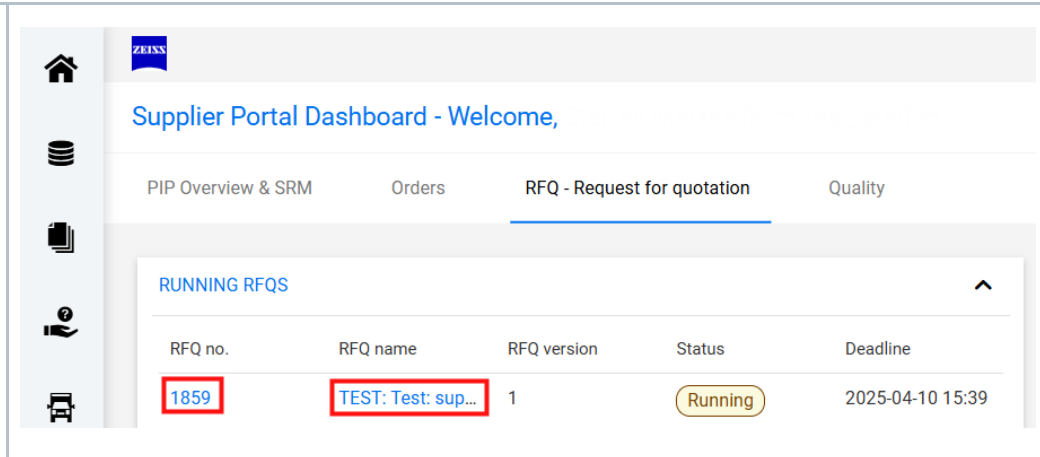
4.3.1 Open RFQ

Instruction	View																																			
<ol style="list-style-type: none"> 1. Click the "Requests" icon. 2. Select "RFQ Pure". 																																				
<ol style="list-style-type: none"> 3. Click either the RFQ number, name, or edit icon to open the RFQ. 	 <table border="1" data-bbox="469 786 1484 994"> <thead> <tr> <th>RFQ NO.</th> <th>VERSION</th> <th>NAME</th> <th>QUOTE STATUS</th> <th>RESPONSIBLE PERSON</th> <th>DEADLINE</th> <th>ITEMS</th> </tr> </thead> <tbody> <tr> <td>1859</td> <td>1</td> <td>TEST: Test supplier documentation</td> <td>New</td> <td></td> <td>2025-04-10 15:39</td> <td>1</td> </tr> <tr> <td>1852</td> <td>1</td> <td>TEST: Test Lieferanten dokumentation</td> <td>Expired</td> <td></td> <td>2025-03-05 11:34</td> <td>1</td> </tr> <tr> <td>1851</td> <td>1</td> <td>TEST: Test Lieferanten dokumentation</td> <td>Expired</td> <td></td> <td>2025-03-05 08:08</td> <td>1</td> </tr> <tr> <td>1849</td> <td>1</td> <td>TEST: Test Lieferanten dokumentation</td> <td>Quoted</td> <td></td> <td>2025-03-03 10:26</td> <td>7</td> </tr> </tbody> </table>	RFQ NO.	VERSION	NAME	QUOTE STATUS	RESPONSIBLE PERSON	DEADLINE	ITEMS	1859	1	TEST: Test supplier documentation	New		2025-04-10 15:39	1	1852	1	TEST: Test Lieferanten dokumentation	Expired		2025-03-05 11:34	1	1851	1	TEST: Test Lieferanten dokumentation	Expired		2025-03-05 08:08	1	1849	1	TEST: Test Lieferanten dokumentation	Quoted		2025-03-03 10:26	7
RFQ NO.	VERSION	NAME	QUOTE STATUS	RESPONSIBLE PERSON	DEADLINE	ITEMS																														
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1849	1	TEST: Test Lieferanten dokumentation	Quoted		2025-03-03 10:26	7																														

alternative

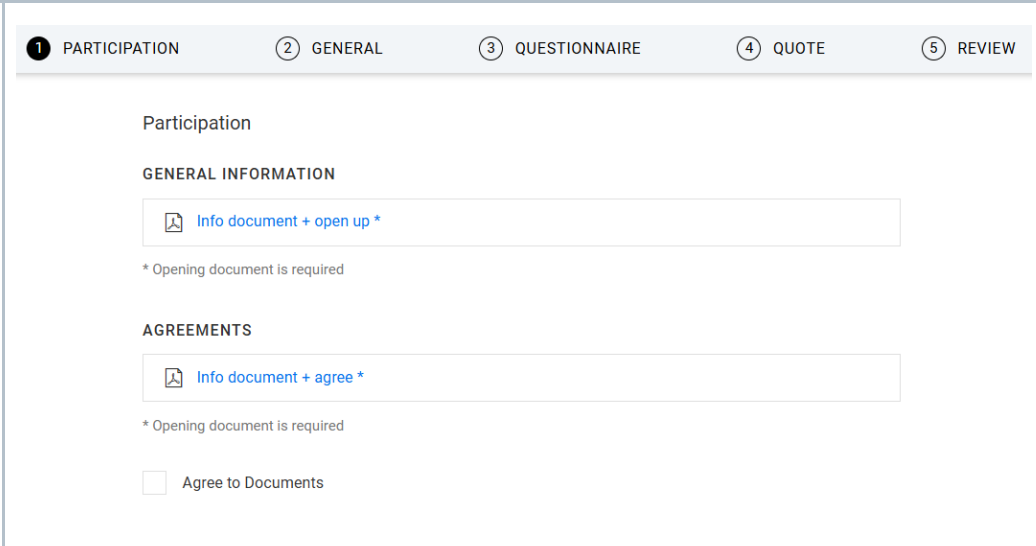
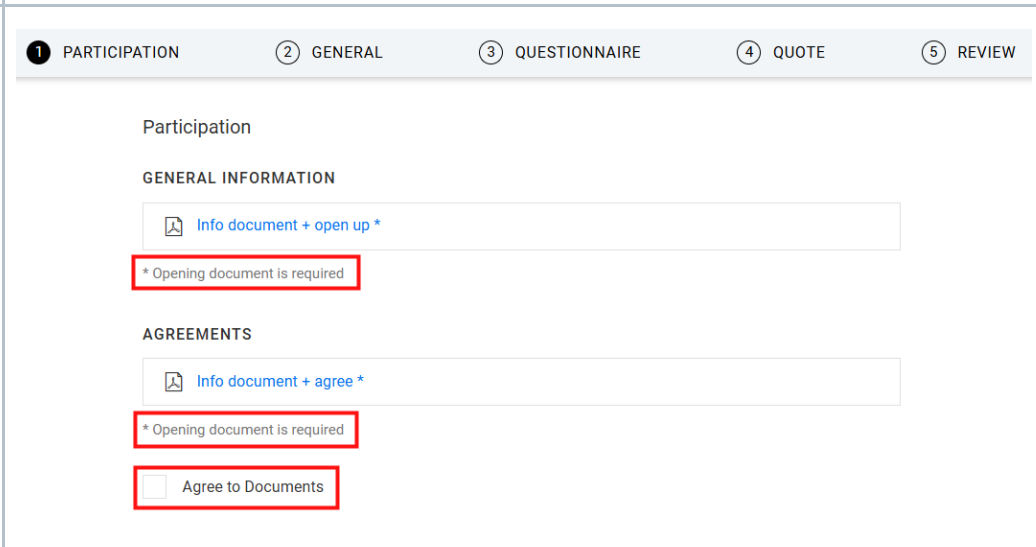
Instruction	View
<ol style="list-style-type: none"> 1. On the dashboard, click the "RFQ – Request for quotation" tab. 2. Overview of the running, testing and completed RFQs opens. You can also jump to the retrievable documents and the RFQ overview. 	

3. Click either the RFQ number or name, to open the RFQ.



RFQ no.	RFQ name	RFQ version	Status	Deadline
1859	TEST: Test: sup...	1	Running	2025-04-10 15:39

4.3.2 Participation

Instruction	View
<p>1. If documents have been attached for this request, you will find them in tab "Participation".</p>	
<p>2. If the document needs to be opened, this notice is available at the download link.</p> <p>3. Be sure to accept the documents by selecting the "Agree to Documents" box.</p>	

<p>4. If you try to click "Accept" without opening the document, the documents will be highlighted in red.</p>	
<p>5. Once you have followed the Instructions, you can proceed to the next step by clicking "Accept".</p>	

4.3.3 General

Instruction	View
<ol style="list-style-type: none"> 1. On the first page you will find all general information about the tender. 2. Please check that the information you have entered here is correct and fill in the missing fields. 3. On the left side under the contact information are your contact persons with technical contact persons if necessary. 4. After editing, click Next Next in the upper right corner. 	

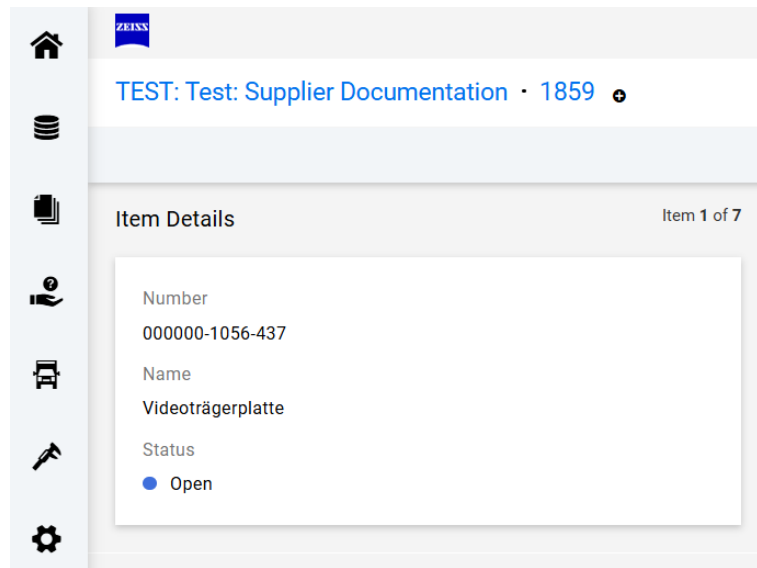
4.3.4 Questionnaire

Instruction	View
<p>1. Tender-specific questionnaires are displayed in the "Questionnaire" tab. The figure shows an example of this.</p> <p>2. These questions can also include free texts, numbers, etc.</p> <p>3. Required fields are marked with an asterisk "*".</p>	

4.3.5 Offer

Instruction	View																																																																																								
<p>1. This page lists all the requested items.</p> <p>2. General information about the positions can be taken from the overview in the middle.</p> <p>3. To populate a position, you must click either</p> <p>1 position name or</p> <p>2 the folder icon on the right.</p>	<table border="1"> <thead> <tr> <th>MATERIAL NUMBER</th> <th>MATERIAL NAME</th> <th>REQUIRED</th> <th>STATUS</th> <th>FILES</th> <th>QUANTITY</th> <th>PRICE UNIT</th> <th>UNIT</th> <th>UNIT PRICE</th> <th>TOTAL PRICE</th> <th>ITEM PLANT</th> </tr> </thead> <tbody> <tr> <td>000000-1056-437</td> <td>Videokörperplatte</td> <td>X</td> <td>Open</td> <td>0</td> <td>600</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>000000-1113-976</td> <td>Video-Grundkörper</td> <td>X</td> <td>Open</td> <td>0</td> <td>600</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>302581-0268-000</td> <td>Platte</td> <td>X</td> <td>Open</td> <td>0</td> <td>1,200</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>302581-0279-000</td> <td>Mitnahmer</td> <td>X</td> <td>Open</td> <td>0</td> <td>1,200</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>302581-0429-000</td> <td>Halter für Motor/Pos</td> <td>X</td> <td>Open</td> <td>0</td> <td>1</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>302581-0702-000</td> <td>Halter Motor / Handan...</td> <td>X</td> <td>Open</td> <td>0</td> <td>800</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> <tr> <td>302581-0227-000</td> <td>Deckel</td> <td>X</td> <td>Open</td> <td>0</td> <td>600</td> <td>1</td> <td>ST</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	MATERIAL NUMBER	MATERIAL NAME	REQUIRED	STATUS	FILES	QUANTITY	PRICE UNIT	UNIT	UNIT PRICE	TOTAL PRICE	ITEM PLANT	000000-1056-437	Videokörperplatte	X	Open	0	600	1	ST				000000-1113-976	Video-Grundkörper	X	Open	0	600	1	ST				302581-0268-000	Platte	X	Open	0	1,200	1	ST				302581-0279-000	Mitnahmer	X	Open	0	1,200	1	ST				302581-0429-000	Halter für Motor/Pos	X	Open	0	1	1	ST				302581-0702-000	Halter Motor / Handan...	X	Open	0	800	1	ST				302581-0227-000	Deckel	X	Open	0	600	1	ST			
MATERIAL NUMBER	MATERIAL NAME	REQUIRED	STATUS	FILES	QUANTITY	PRICE UNIT	UNIT	UNIT PRICE	TOTAL PRICE	ITEM PLANT																																																																															
000000-1056-437	Videokörperplatte	X	Open	0	600	1	ST																																																																																		
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302581-0268-000	Platte	X	Open	0	1,200	1	ST																																																																																		
302581-0279-000	Mitnahmer	X	Open	0	1,200	1	ST																																																																																		
302581-0429-000	Halter für Motor/Pos	X	Open	0	1	1	ST																																																																																		
302581-0702-000	Halter Motor / Handan...	X	Open	0	800	1	ST																																																																																		
302581-0227-000	Deckel	X	Open	0	600	1	ST																																																																																		

4. On the left side you can see the item details.



TEST: Test: Supplier Documentation · 1859

Item Details Item 1 of 7

Number
000000-1056-437

Name
Videoträgerplatte

Status
● Open

5. In the middle of the offer details, you can enter your offers for this position.

Note: This overview may look different because specific cost-break-down may be selected for each tender.

Quote Details

QUOTE

SOP

2025-03-27

EOP

2025-03-27

Price Reduction

2025

0 %

Quantity

0.00

Price Unit: (int)

1

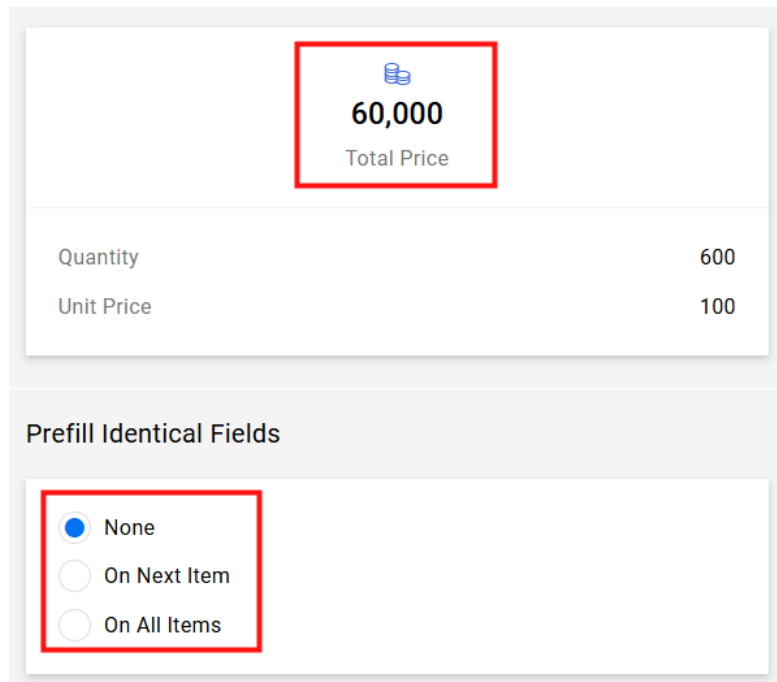
Price Break 600*


e.g.1,000 / 1 ST

ADDITIONAL INFORMATION

Comment

6. On the right you can see the total amount of your offer for this position.
7. The sum is calculated from your data in the middle of the "Total Price" field and the specified quantity, in this case 600 pieces.
8. The values you specified can now be applied to the next item or to all items.




60,000
 Total Price

Quantity	600
Unit Price	100

Prefill Identical Fields

None
 On Next Item
 On All Items

9. Click "Cancel" if you do not want to save the entered data and return to the overview.
10. Click "Decline" to refrain from bidding for this line.
11. Click "Save" to save the entered values and move automatically to the next position.

Cancel Decline Save

12. If you "Decline" Decline a position, you must provide a reason. In this case, this field will open automatically.
13. You will then be taken directly to the next position.

Decline Item ×

Reason*

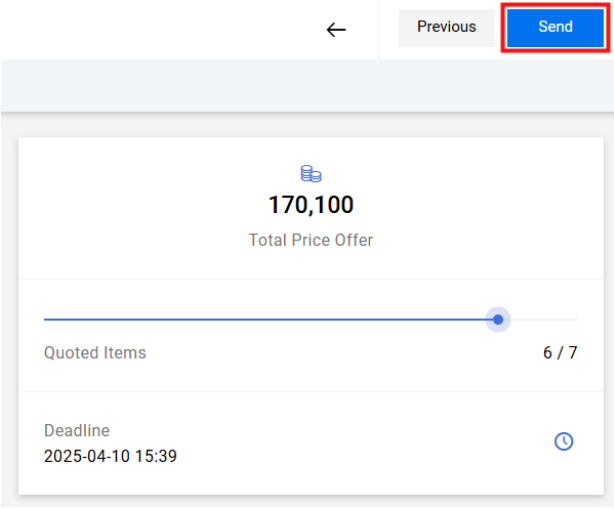
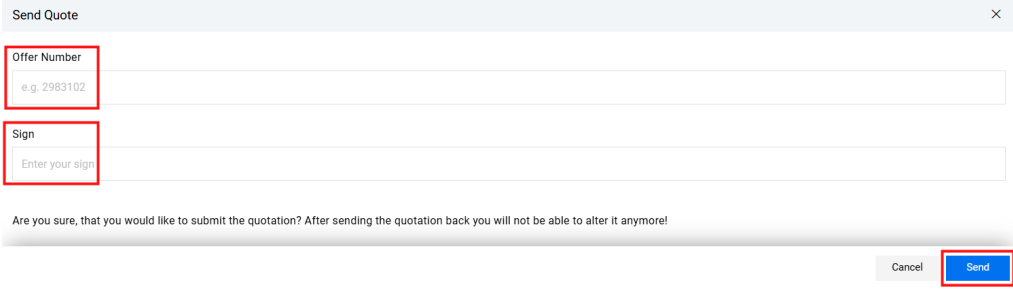
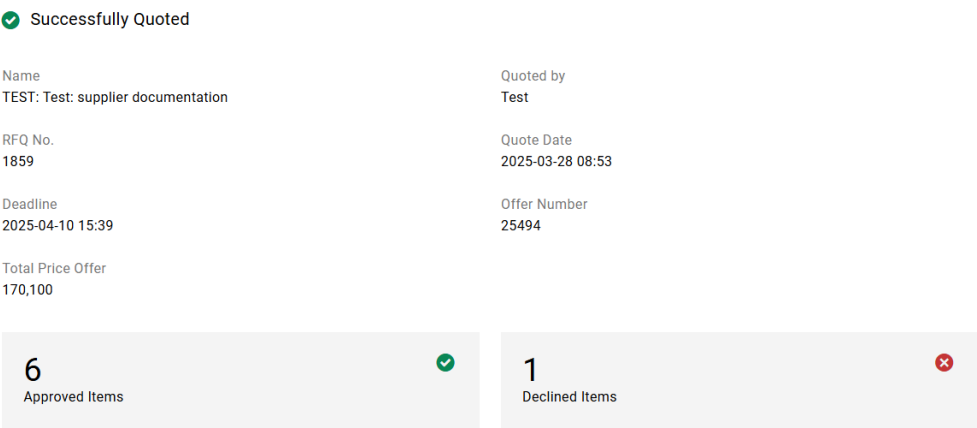
Why are you declining this item?

Cancel Decline

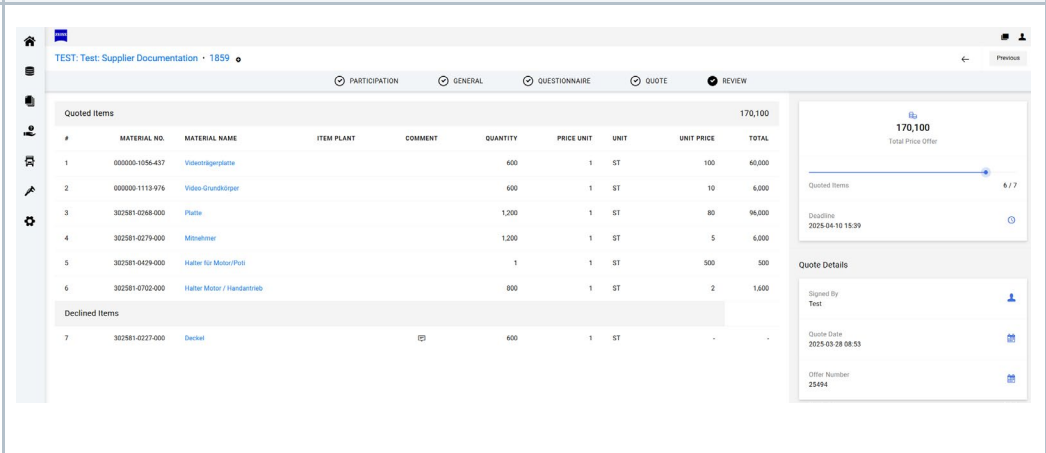
4.3.6 Review

Instruction	View
<p>1. In the middle you can see a list of the positions and the most essential information of your data.</p> <p>2. The collection is divided into:</p> <p>1 "Accepted Items" - items you have submitted a quote for, and</p> <p>2 "Declined items" - lines that you rejected.</p>	
<p>3. Important: Please check all details in this overview.</p> <p>4. By clicking on the tabs, you can change the details in the previously processed topics.</p> <p>5. If you want to change a quote for a line, click the line name.</p>	

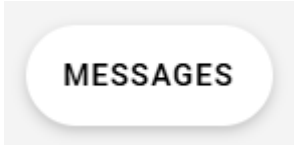
4.3.7 Return Offer

Instruction	View								
<p>1. If you have verified your data, you can click on "Send".</p>	 <p>The screenshot shows a navigation bar with a back arrow, a 'Previous' button, and a 'Send' button highlighted with a red box. Below it is a summary card for a 'Total Price Offer' of 170,100. The card includes a progress bar for 'Quoted Items' (6 / 7) and a 'Deadline' of 2025-04-10 15:39.</p>								
<p>2. Now it is possible to enter a supplier quote number and your logo.</p> <p>3. If you click "Send", your quote will be returned to the buyer. You can no longer change the offer.</p>	 <p>The screenshot shows a 'Send Quote' form with fields for 'Offer Number' (e.g., 2983102) and 'Sign' (Enter your sign), both highlighted with red boxes. A confirmation message asks: 'Are you sure, that you would like to submit the quotation? After sending the quotation back you will not be able to alter it anymore!'. 'Cancel' and 'Send' buttons are at the bottom, with 'Send' highlighted in red.</p>								
<p>4. Finally, you will receive a confirmation with a summary of the request.</p>	 <p>The screenshot shows a 'Successfully Quoted' confirmation screen with the following details:</p> <table border="0"> <tr> <td>Name TEST: Test: supplier documentation</td> <td>Quoted by Test</td> </tr> <tr> <td>RFQ No. 1859</td> <td>Quote Date 2025-03-28 08:53</td> </tr> <tr> <td>Deadline 2025-04-10 15:39</td> <td>Offer Number 25494</td> </tr> <tr> <td colspan="2">Total Price Offer 170,100</td> </tr> </table> <p>At the bottom, there are two summary boxes: '6 Approved Items' with a green checkmark and '1 Declined Items' with a red X.</p>	Name TEST: Test: supplier documentation	Quoted by Test	RFQ No. 1859	Quote Date 2025-03-28 08:53	Deadline 2025-04-10 15:39	Offer Number 25494	Total Price Offer 170,100	
Name TEST: Test: supplier documentation	Quoted by Test								
RFQ No. 1859	Quote Date 2025-03-28 08:53								
Deadline 2025-04-10 15:39	Offer Number 25494								
Total Price Offer 170,100									

4.3.8 Archived RFQ

Instruction	View																																																																																										
<p>1. After submission, you can view the RFQ in archived mode. You can also revisit this request later to review it, but no further changes can be made.</p> <p>2. Messages can still be sent/answered.</p>	 <table border="1"> <caption>Quoted Items</caption> <thead> <tr> <th>#</th> <th>MATERIAL NO.</th> <th>MATERIAL NAME</th> <th>ITEM PLANT</th> <th>COMMENT</th> <th>QUANTITY</th> <th>PRICE UNIT</th> <th>UNIT</th> <th>UNIT PRICE</th> <th>TOTAL</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>000005-1056-437</td> <td>Vorschlagplatte</td> <td></td> <td></td> <td>600</td> <td>1</td> <td>ST</td> <td>100</td> <td>60,000</td> </tr> <tr> <td>2</td> <td>000000-1113-976</td> <td>Vision-Grundkörper</td> <td></td> <td></td> <td>600</td> <td>1</td> <td>ST</td> <td>10</td> <td>6,000</td> </tr> <tr> <td>3</td> <td>302581-0268-000</td> <td>Platte</td> <td></td> <td></td> <td>1,200</td> <td>1</td> <td>ST</td> <td>80</td> <td>96,000</td> </tr> <tr> <td>4</td> <td>302581-0279-000</td> <td>Mittelmeer</td> <td></td> <td></td> <td>1,200</td> <td>1</td> <td>ST</td> <td>5</td> <td>6,000</td> </tr> <tr> <td>5</td> <td>302581-0419-000</td> <td>Halter für Motor/Pull</td> <td></td> <td></td> <td>1</td> <td>1</td> <td>ST</td> <td>500</td> <td>500</td> </tr> <tr> <td>6</td> <td>302581-0702-000</td> <td>Halter Motor / Handantrieb</td> <td></td> <td></td> <td>800</td> <td>1</td> <td>ST</td> <td>2</td> <td>1,600</td> </tr> </tbody> </table> <table border="1"> <caption>Declined Items</caption> <thead> <tr> <th>#</th> <th>MATERIAL NO.</th> <th>MATERIAL NAME</th> <th>ITEM PLANT</th> <th>COMMENT</th> <th>QUANTITY</th> <th>PRICE UNIT</th> <th>UNIT</th> <th>UNIT PRICE</th> <th>TOTAL</th> </tr> </thead> <tbody> <tr> <td>7</td> <td>302581-0227-000</td> <td>Deckel</td> <td></td> <td></td> <td>600</td> <td>1</td> <td>ST</td> <td>-</td> <td>-</td> </tr> </tbody> </table>	#	MATERIAL NO.	MATERIAL NAME	ITEM PLANT	COMMENT	QUANTITY	PRICE UNIT	UNIT	UNIT PRICE	TOTAL	1	000005-1056-437	Vorschlagplatte			600	1	ST	100	60,000	2	000000-1113-976	Vision-Grundkörper			600	1	ST	10	6,000	3	302581-0268-000	Platte			1,200	1	ST	80	96,000	4	302581-0279-000	Mittelmeer			1,200	1	ST	5	6,000	5	302581-0419-000	Halter für Motor/Pull			1	1	ST	500	500	6	302581-0702-000	Halter Motor / Handantrieb			800	1	ST	2	1,600	#	MATERIAL NO.	MATERIAL NAME	ITEM PLANT	COMMENT	QUANTITY	PRICE UNIT	UNIT	UNIT PRICE	TOTAL	7	302581-0227-000	Deckel			600	1	ST	-	-
#	MATERIAL NO.	MATERIAL NAME	ITEM PLANT	COMMENT	QUANTITY	PRICE UNIT	UNIT	UNIT PRICE	TOTAL																																																																																		
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4.4 Message Portal

Instruction	View
<p>1. From the moment you open the RFQ, a "Messages" field appears in the bottom right corner of the page. If you have any questions, you can contact the ZEISS purchaser and the technical contact person directly from the inquiry. There is always a link to this request from which you start the message. You will also see the entire communication history in this portal.</p>	

2. If there are no messages yet, please click on "New message".



No Messages

There are no messages in your portal yet

[New Message](#)

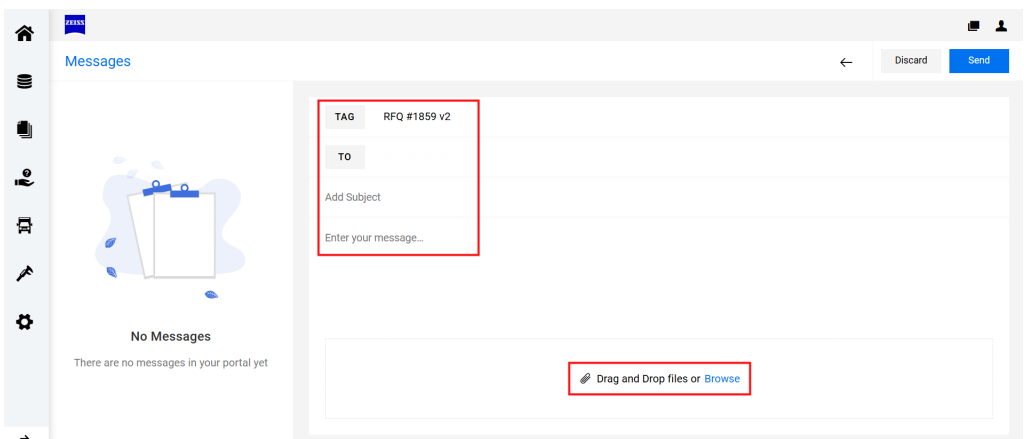
3. If you start multiple communications with the buyer, you can view these chats on the left.

4. In the middle you can enter a new message and select the contact person for it.

5. The answers of ZEISS can also be obtained via this message function in the request. You will also be informed by e-mail.

6. You can send the message to ZEISS using "Send"

[Send](#)

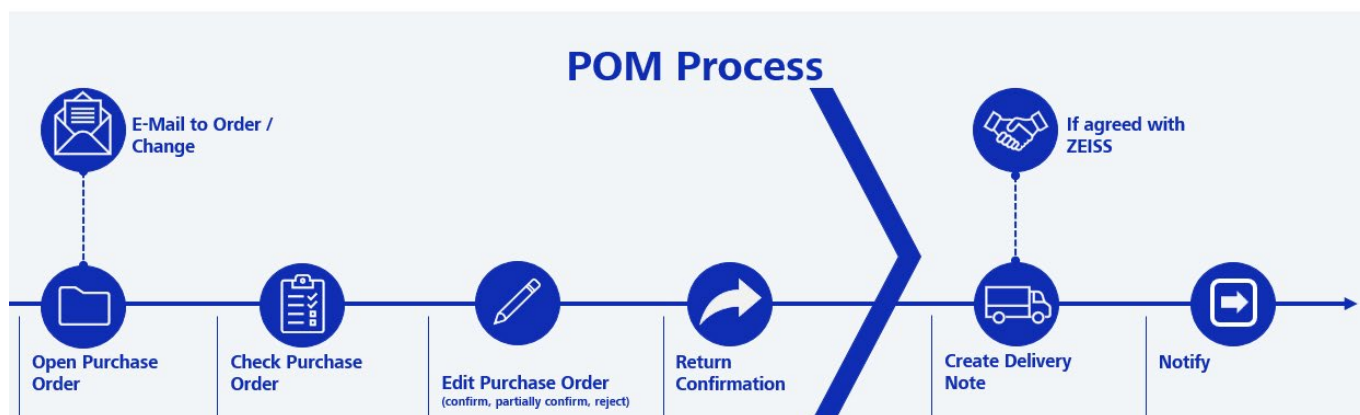


5 Order Processing (POM)

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5.1 Process Diagram

The orders created by ZEISS are available to the supplier electronically in the Supplier Portal. The order processing in the Supplier Portal is called Web-EDI. The supplier can access the order in the portal, process it and return an order confirmation to ZEISS. Furthermore, the supplier can create delivery notes and advise the delivery. This also is automatically transmitted back to ZEISS.



5.2 General Information on how to use the Order Processing

5.2.1 Order List

The purchase order list is the view of the purchase orders at the header level. You will see the status and data of your orders received.

Instruction	View
<ol style="list-style-type: none"> Click the "SCM" icon. Select "Direct Purchase Orders". Select the Order List within the "Direct Purchase Orders". 	<p>The screenshot shows a navigation menu with the following items:</p> <ul style="list-style-type: none"> SCM (highlighted with a red box) Direct Purchase Orders (highlighted with a red box) Delivery Call Off VMI ASN Forecast Invoices <p>Under the 'Direct Purchase Orders' sub-menu, the following items are listed:</p> <ul style="list-style-type: none"> Order List (highlighted with a red box) Position List Disposition List

Instruction	View
<ol style="list-style-type: none"> Click "All View" to see an overview of all orders. If a different view is needed, please select the desired view. The filter icon on the right allows you to filter the list by different criteria. By clicking the Tool icon, you are able to adjust the table layout. 	<p>The screenshot shows the 'Received orders' page with a table of orders. The table has columns for Order number, Customer, Plant name, Menu, Created, Last modified, Confirmation, State, Open, Changes, Files, Create delivery note, Order Type, Currency, and Order value. The 'All View' button is highlighted in the top navigation bar. The filter icon and tool icon are highlighted in the top right corner of the table.</p>

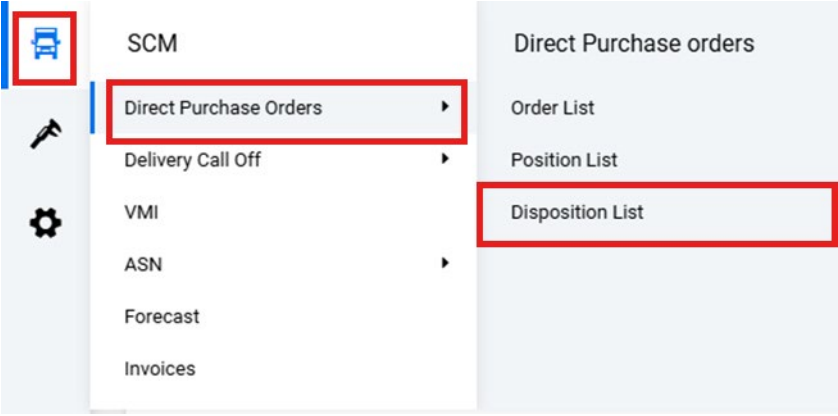
5.2.2 Position List

The Position List displays the purchase orders at item level. It is possible to filter and search specifically for a material.

Instruction	View
<ol style="list-style-type: none"> Click the "SCM" icon. Select "Direct Purchase Orders". Select the "Position list" within the Direct Purchase Orders. 	<p>The screenshot shows the SCM navigation menu. The 'SCM' icon is highlighted. The 'Direct Purchase Orders' menu item is highlighted, and its sub-item 'Position List' is also highlighted.</p>

5.2.3 Disposition List

The Disposition List is the work list of all previously confirmed items to be delivered. Based on the Disposition List, the delivery note can be created and monitored.

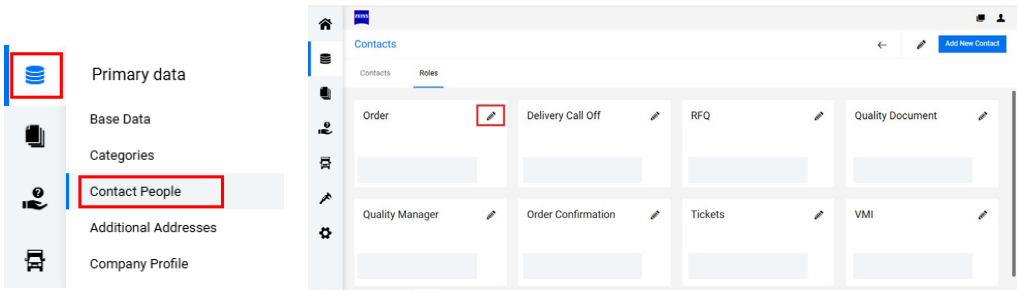
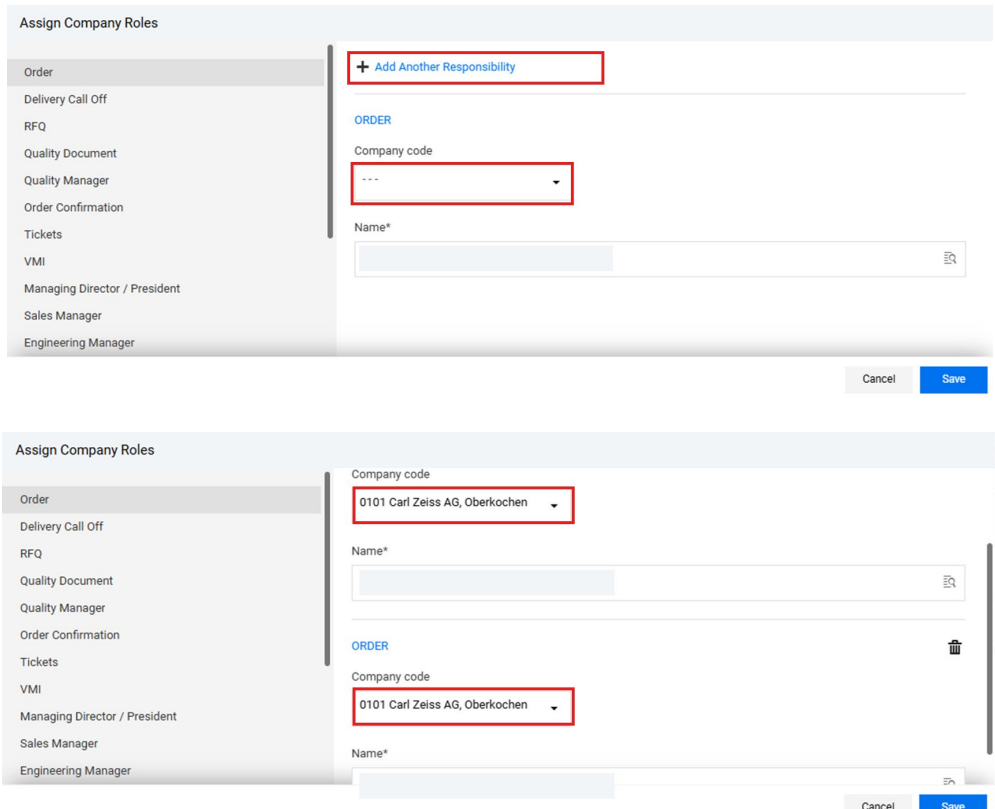
Instruction	View
<p>2. Click the "SCM" icon.</p> <p>3. Select "Direct Purchase Orders".</p> <p>4. Select the "Disposition List" within the "Direct Purchase Orders".</p>	 <p>The screenshot shows a navigation menu for SCM. The 'SCM' header is highlighted with a red box. Below it, 'Direct Purchase Orders' is highlighted with a red box. A sub-menu is open, showing 'Direct Purchase orders', 'Order List', 'Position List', and 'Disposition List'. The 'Disposition List' option is highlighted with a red box.</p>

5.3 Purchase Order

When you receive new orders from ZEISS, you can open and edit them via the Supplier Portal. You can confirm the orders, confirm them only partially or reject them.


5.3.1 Responsibility for Orders

The supplier can define responsible contacts for orders. The relevant role for this is the “Orders” role. The “Orders” role defines which contact or contacts receive the e-mail notification when a new order or order change is received. Responsibility can be controlled as overall responsibility or depending on the ZEISS company (company code). Multiple selections are possible.


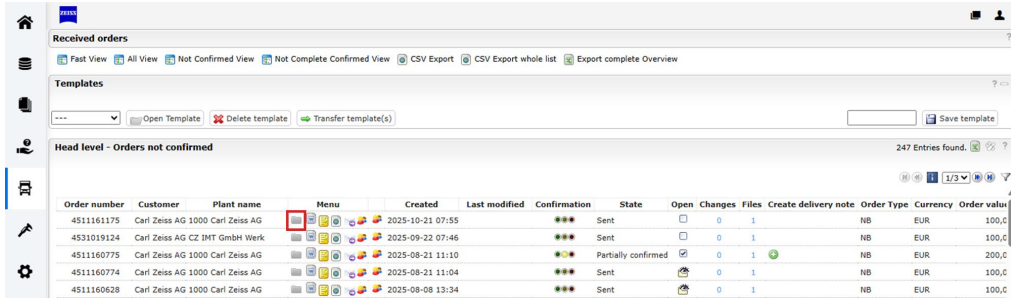
Instruction	View
<p>1. Open the overview of contacts and roles.</p> <p>2. To set the responsibility, click on the edit icon for the “Orders” role.</p>	
<p>3. Assignment of responsibility</p> <p>a) Overall responsibility for all ZEISS companies (---)</p> <p>b) Responsibility for one ZEISS company (company code)</p> <p>To assign multiple responsible persons, another entry must be created via “+ Add Another Responsibility”.</p>	

5.3.2 Purchase Order Receipt

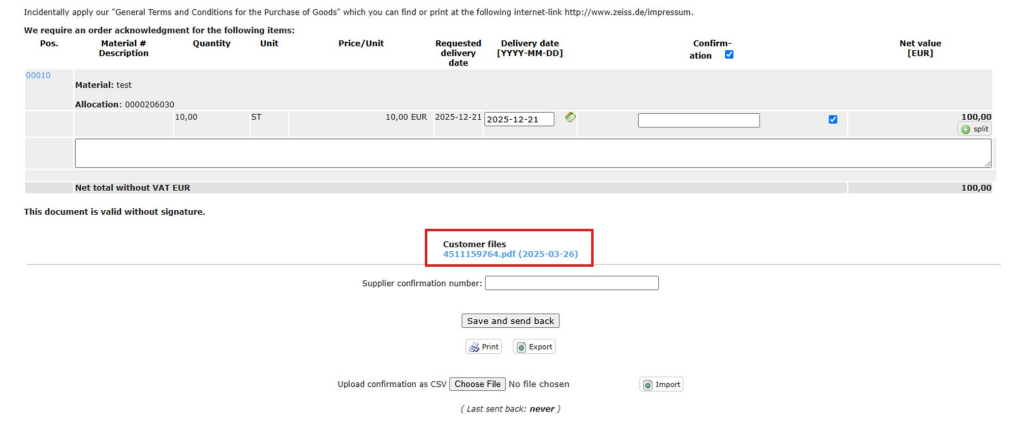
Open Purchase Order

Instruction	View
<p>1. You will receive an e-mail notification when you receive an order or order change. This e-mail contains a link that will take you directly to the respective order in the portal.</p> <p>2. Open the link, enter your login details if necessary to open the order.</p>	<div style="border: 1px solid #ccc; padding: 10px;">  <p>New purchase order from 1000 Carl Zeiss AG received</p> <p>Dear Sir or Madam,</p> <p>you hereby receive the access link to the order 4511159770 from the company 1000 Carl Zeiss AG :</p> <p>Please log in with your existing access data and process the order in the ZEISS supplier portal. If you are connected via EDI, you can process the order in your system.</p> <p>Details:</p> <p>Link to PO</p> <p>Link to the ZEISS Supplier Portal</p> <p>PO number: 4511159770 Businesspartner: USUS Ulrich Schäufler Businesspartner ID: 5518290</p> <p>If you have any questions, please do not hesitate to contact your ZEISS contact person.</p> <p>Best regards</p> <p>Your ZEISS Supplier Portal</p> <p><i>This message was created automatically.</i></p> </div>

Alternatively, you can find and open the order directly in the Supplier Portal. The following instructions explain how to do this.

Instruction	View
<ol style="list-style-type: none"> 4. Navigate to “SCM” in the system, then to “Direct Purchase Orders” and “Order List”. 5. Make sure the view shows all the orders. 6. Find the order in the list. 7. Click the  icon to open the purchase order. 	

Check Purchase Order

Instruction	View
<ol style="list-style-type: none"> 1. Open the PDF document with the Purchase Order. 2. You can print out the PDF file or save it for archiving. 3. Check that the information in the PDF is correct. 	

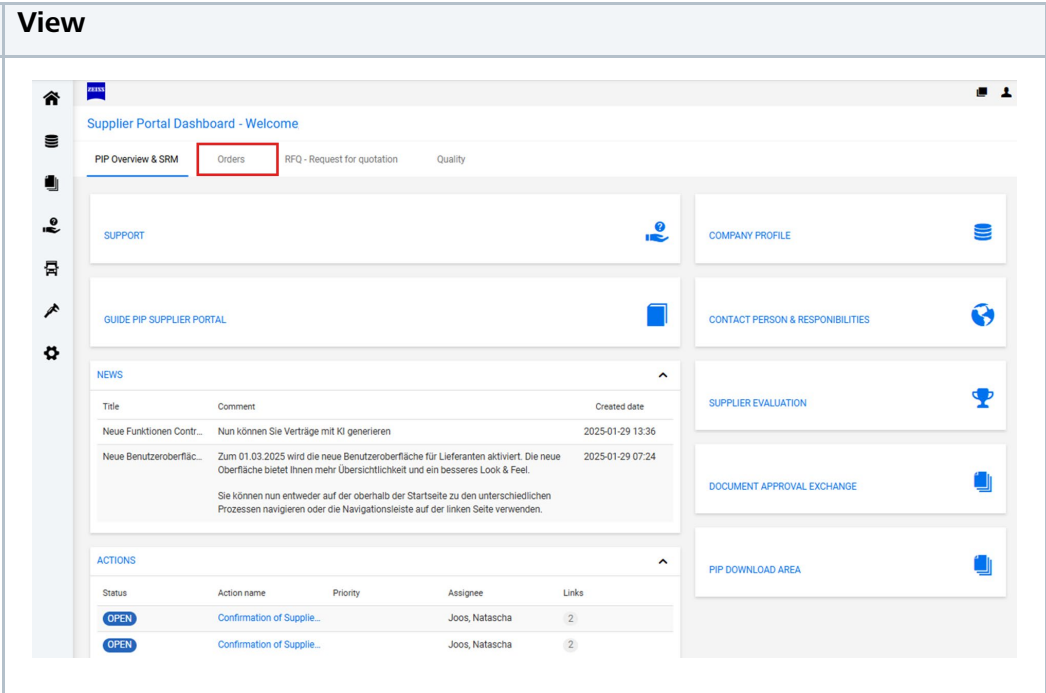
Note:

The PDF-file for the order is the legally valid order document, which contains all the essential details of the order and must be read before the order is confirmed.

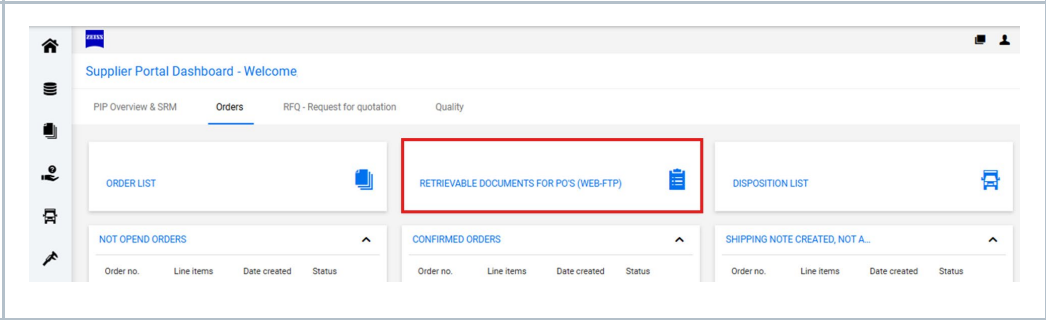
The provision of additional documents related to the order, e.g. drawings, is done via the Web-FTP server. In order to retrieve the documents on the Web-FTP server, an access must be set up and linked before the usage. If you have any questions, please first contact your responsible buyer at ZEISS.

Instruction

1. To retrieve documents, navigate to "Orders" on the landing page.



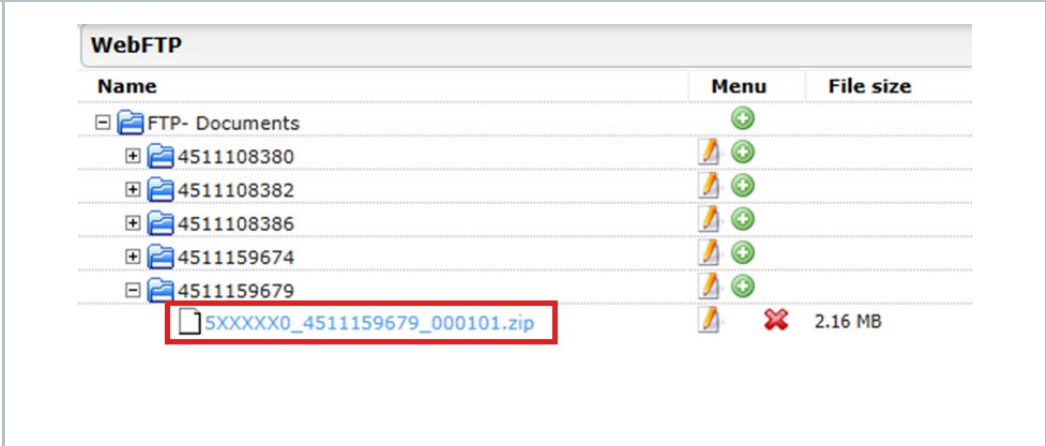
2. Click the "Retrievable Documents for PO's (Web-FTP)" link to retrieve the purchase order documents.



3. Open the folder of the order using the "plus" symbol.

4. Click on the file to download it.

Note: Documents are only available for retrieval for 10 days.



Edit Purchase Order

Instruction	View																																				
<ol style="list-style-type: none"> 1. Check the Delivery Date and change it via the calendar function if you are unable to meet the requested delivery date. 2. Please check the ordered quantity. If a split of deliveries is required, split the delivery using the Split button. 3. Enter your order confirmation number. If you enter it below under Supplier Confirmation Number, it will be used for all items and does not need to be entered separately for each item. 4. Make sure that the check mark is set for all the items you want to confirm. If you do not want to confirm a position, please remove the check mark. 5. Send order confirmation via "Save and send back". 	<p>Incidentally apply our "General Terms and Conditions for the Purchase of Goods" which you can find or print at the following internet-link http://www.zeiss.de/impressum.</p> <p>We require an order acknowledgment for the following items:</p> <table border="1"> <thead> <tr> <th>Pos.</th> <th>Material # Description</th> <th>Quantity</th> <th>Unit</th> <th>Price/Unit</th> <th>Requested delivery date</th> <th>Delivery date [YYYY-MM-DD]</th> <th>Confirm- ation <input checked="" type="checkbox"/></th> <th>Net value [EUR]</th> </tr> </thead> <tbody> <tr> <td>00010</td> <td>Material: test Allocation: 0000206030</td> <td>10,00</td> <td>ST</td> <td>10,00 EUR</td> <td>2025-12-21</td> <td>2025-12-21</td> <td><input checked="" type="checkbox"/></td> <td>100,00</td> </tr> <tr> <td colspan="8"> <input type="button" value="split"/> </td> <td></td> </tr> <tr> <td colspan="8">Net total without VAT EUR</td> <td>100,00</td> </tr> </tbody> </table> <p>This document is valid without signature.</p> <p>Customer files 4511159764.pdf (2025-03-26)</p> <p>Supplier confirmation number: <input type="text"/></p> <p><input type="button" value="Save and send back"/> <input type="button" value="Print"/> <input type="button" value="Export"/></p> <p>Upload confirmation as CSV <input type="button" value="Choose File"/> No file chosen <input type="button" value="Import"/></p> <p>(Last sent back: never)</p>	Pos.	Material # Description	Quantity	Unit	Price/Unit	Requested delivery date	Delivery date [YYYY-MM-DD]	Confirm- ation <input checked="" type="checkbox"/>	Net value [EUR]	00010	Material: test Allocation: 0000206030	10,00	ST	10,00 EUR	2025-12-21	2025-12-21	<input checked="" type="checkbox"/>	100,00	<input type="button" value="split"/>									Net total without VAT EUR								100,00
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<input type="button" value="split"/>																																					
Net total without VAT EUR								100,00																													

5.3.3 Cancellation of Purchase Orders by ZEISS

Instruction	View
<ol style="list-style-type: none"> If an order or item is canceled by ZEISS, you will be notified by e-mail. The order is shown in the portal with a strikethrough. Confirmation by you is no longer required. 	<p>The screenshot shows the 'Received orders' interface. At the top, there are navigation options: 'Fast View', 'All View' (highlighted with a red box), 'Not Confirmed View', 'Not Complete Confirmed View', 'CSV Export', 'CSV Export whole list', and 'Export complete Overview'. Below this is a 'Templates' section with 'Open Template', 'Delete template', and 'Transfer template(s)' buttons. The main area is a table with columns: Order number, Customer, Plant name, Menu, Created, Last modified, Confirmation, State, Open, Changes, Files, Create delivery note, Order Type, Currency, and Order. The first row is highlighted with a red box, showing order number 4511164029, customer Carl Zeiss AG 1000, and plant name Carl Zeiss AG. The 'Confirmation' column shows 'Sent' and the 'State' column shows 'Sent'.</p>

5.4 Create and Advise a Delivery Note

Instruction	View
<ol style="list-style-type: none"> Click the "SCM" icon. Select "Direct Purchase Orders". Select the "Disposition List" within the "Direct Purchase Orders". 	<p>The screenshot shows the SCM navigation menu. The 'SCM' icon is highlighted with a red box. The 'Direct Purchase Orders' menu item is highlighted with a red box, and the 'Disposition List' sub-item is highlighted with a red box. The menu items are: SCM, Direct Purchase Orders, Delivery Call Off, VMI, ASN, Forecast, and Invoices. The sub-items for 'Direct Purchase Orders' are: Direct Purchase orders, Order List, Position List, and Disposition List.</p>

4. Select one or more lines to create and advise a delivery note. Lines from different orders can be combined in a delivery note & delivery advice if the plant is the same.

5. Click on the + icon to create the delivery note.


6. Confirm the message by clicking "Create".

The screenshot shows the SAP 'Work List (Confirmed Orders): Orders' interface. A table lists several confirmed orders from Carl Zeiss AG Oberkochen und Servicebereiche. Two lines are selected with checkboxes. A '+' icon in the top right corner is highlighted with a red box. Below the table, a 'Create delivery note' dialog box is open, asking 'Are you sure that you want to create a delivery note?'. The 'Create' button in the dialog is also highlighted with a red box.

Delivery address	Status	Order no.	Material ...	Open ...	Quantity	Unit	Position	Delivery date	Plant	Advis...
<input checked="" type="checkbox"/>	Confirmed	4511108375	test	2,00	2,00	ST	00020	2025-12-22	1000	0,00
<input checked="" type="checkbox"/>	Confirmed	4511108375	test	6,00	6,00	ST	00010	2025-12-22	1000	0,00
<input type="checkbox"/>	Confirmed	4511108374	test	5,00	10,00	ST	00010	2025-12-22	1000	5,00
<input type="checkbox"/>	Confirmed	4511108353	test	1,00	1,00	ST	00040	2025-12-22	1000	0,00
<input type="checkbox"/>	Confirmed	4511108353	test	5,00	5,00	ST	00010	2025-12-22	1000	0,00
<input type="checkbox"/>	Confirmed	4511159764	test	10,00	10,00	ST	00010	2025-12-21	1000	0,00

7. Enter a delivery note number in the "Delivery note no." field.

8. If you only want to save the delivery note, but you do not want to advise/notify it yet, click "Save".

9. If you want to directly advise/notify the delivery note without any further changes, click the notify icon .

The screenshot shows the 'Edit Delivery Note' dialog box in SAP. The 'General' tab is active. The 'Delivery note no.' field is empty and highlighted with a red box. Other fields include 'ERP Delivery Note Number', 'Delivery address' (Carl Zeiss AG Oberkochen und Servicebereiche), 'Vendor no.', 'Plant' (1000), and 'Delivery date (ETA)' (2025-12-22). Under the 'DELIVERY NOTES' section, 'Incoterm 1' is 'FH' and 'Incoterm 2' is '-'. In the top right corner, the 'Save' icon (a floppy disk) is highlighted with a red box.

Instruction

View

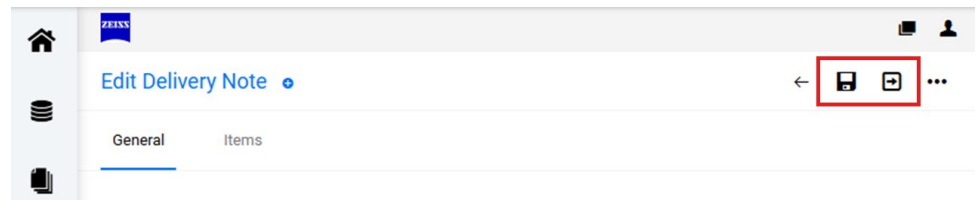
1. If you want to make any further changes before sending the ASN, open the saved delivery notes using

The screenshot shows a SAP navigation menu. The 'ASN' option is highlighted with a red box. A sub-menu is open, showing 'Open ASNs' highlighted with a red box. Other options in the sub-menu include 'My Open Transports', 'Advised Transports', and 'Advised Delivery Notes'. The 'SCM' icon in the main menu is also highlighted with a red box.

<p>SCM > ASN > Open ASNs.</p>	
<p>2. Click on the delivery note number to edit/advise.</p>	
<p>3. Further editing options are available via the three dots .</p> <p>4. You can change the handover date.</p> <p>5. You can add items.</p> <p>6. Change delivery date.</p> <p>7. Print delivery note.</p> <p>8. Delete delivery note.</p>	
<p>9. In the "Items" tab you can edit the positions (optional).</p> <p>10. Please select a position.</p> <p>11. You can split positions.</p> <p>12. Edit lines (Qty., Batch, Production Date, best before date, country of origin, Serial number).</p> <p>13. Delete Position.</p> <p>14. You can enter the serial number (separated by commas and spaces for multiple serial numbers).</p>	

15. If you only want to save the delivery note, but you do not want to advise/notify it yet, click Save.

16. If you want to directly advise/notify the delivery note without any further changes, click the notify icon

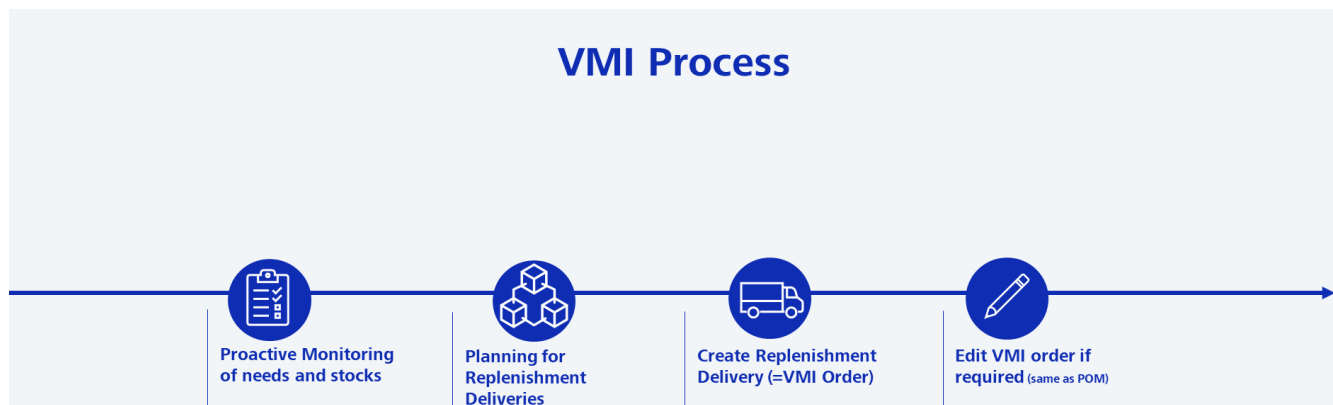


6 Vendor Managed Inventory (VMI)

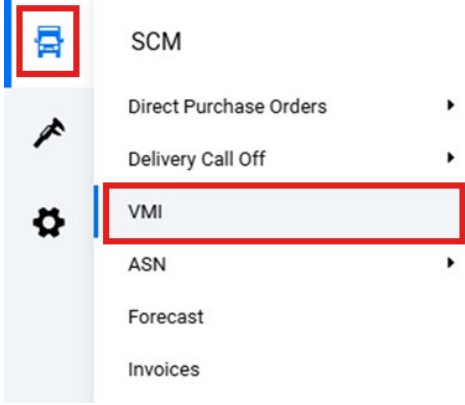
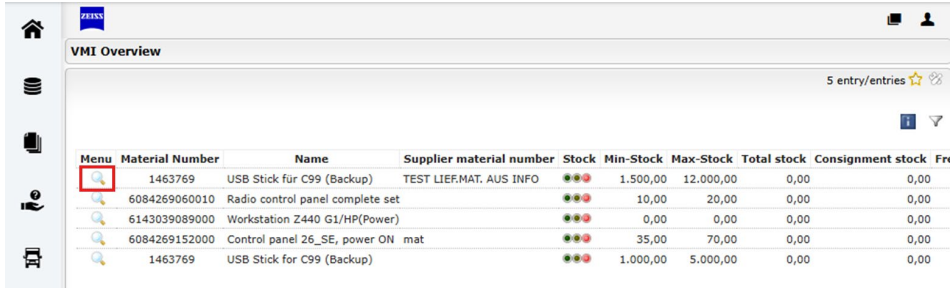
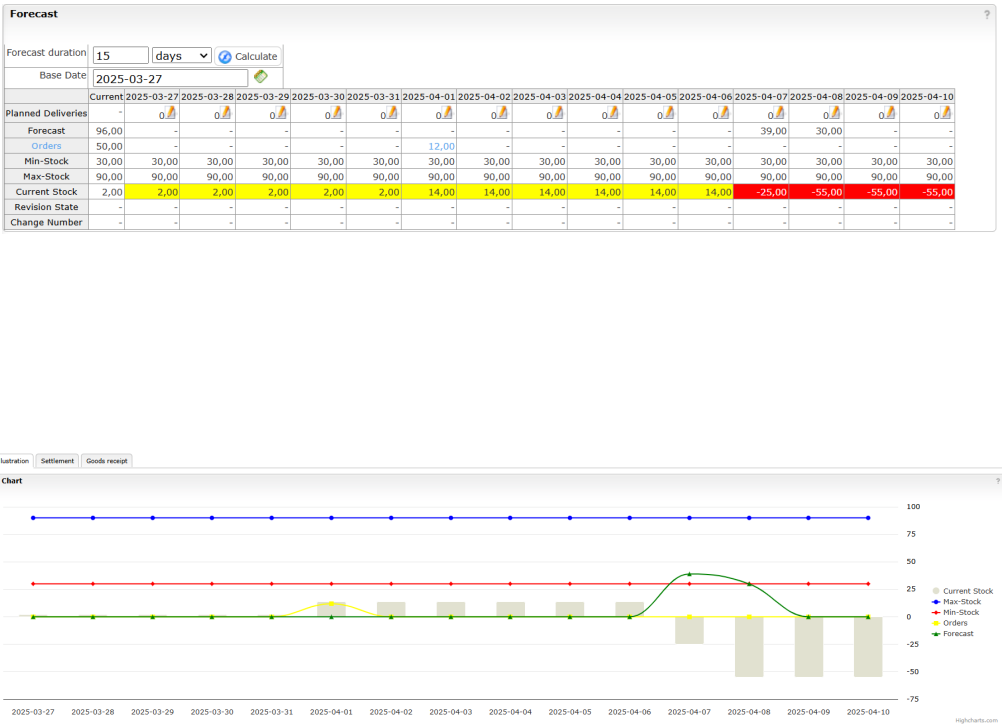
6.1	Process Diagram	69
6.2	Forecast and Stock Overview	70
6.3	Creating of a VMI Replenishment Delivery (= VMI Order).....	71
6.4	Change a VMI Order.....	72

6.1 Process Diagram

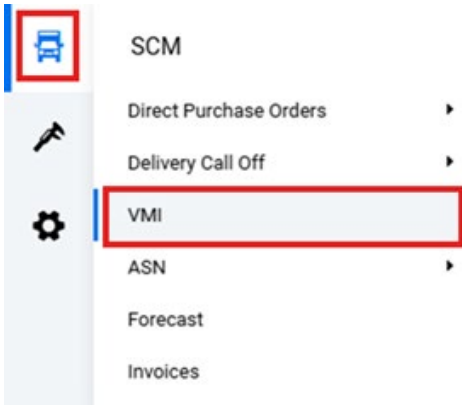
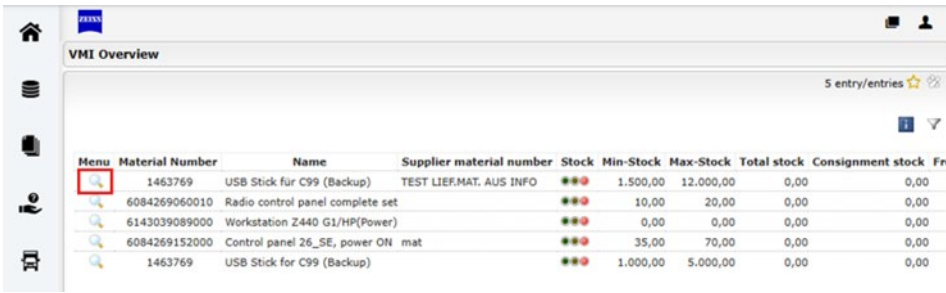

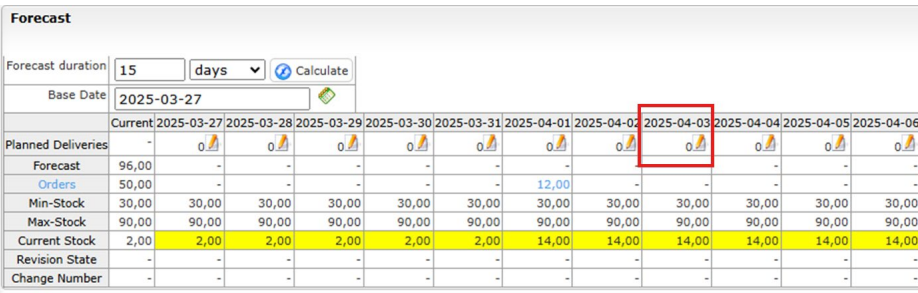
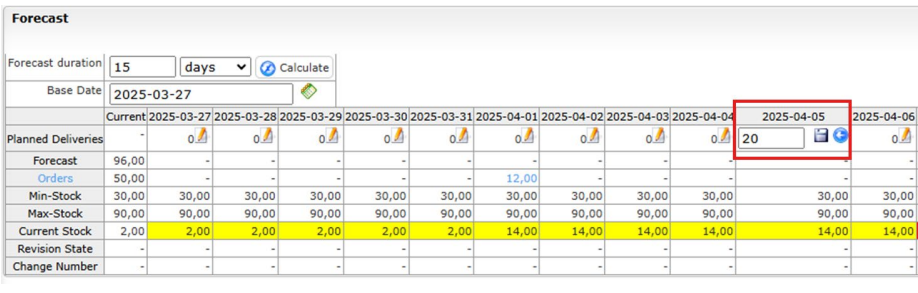
Vendor Managed Inventory (VMI) is a process for obtaining materials in which the supplier takes over the inventory management of the customer. This is done within defined parameters, so that the supplier can optimally adapt its disposition to the production capacities. Minimum and maximum stocks are defined for each material and the corresponding requirements are shown online in the Supplier Portal for the supplier.



6.2 Forecast and Stock Overview

Instruction	View																																																																																																																																																									
<ol style="list-style-type: none"> Click the "SCM" icon. Select "VMI". 	 <p>The screenshot shows a vertical menu on the left with icons for SCM (truck), Direct Purchase Orders (hand), Delivery Call Off (gavel), VMI (gear), ASN (truck), Forecast (line graph), and Invoices (document). The 'VMI' option is highlighted with a red box.</p>																																																																																																																																																									
<ol style="list-style-type: none"> Select the material by clicking the magnifying glass icon to open the material's detail view. 	 <p>The screenshot shows the 'VMI Overview' page with a table of materials. The first row is highlighted with a red box.</p> <table border="1"> <thead> <tr> <th>Menu</th> <th>Material Number</th> <th>Name</th> <th>Supplier material number</th> <th>Stock</th> <th>Min-Stock</th> <th>Max-Stock</th> <th>Total stock</th> <th>Consignment stock</th> <th>Fr</th> </tr> </thead> <tbody> <tr> <td></td> <td>1463769</td> <td>USB Stick für C99 (Backup)</td> <td>TEST LIEF.MAT. AUS INFO</td> <td>●●●</td> <td>1.500,00</td> <td>12.000,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6084269060010</td> <td>Radio control panel complete set</td> <td></td> <td>●●●</td> <td>10,00</td> <td>20,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6143039089000</td> <td>Workstation Z440 G1/HP(Power)</td> <td></td> <td>●●●</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6084269152000</td> <td>Control panel 26_SE, power ON mat</td> <td></td> <td>●●●</td> <td>35,00</td> <td>70,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>1463769</td> <td>USB Stick for C99 (Backup)</td> <td></td> <td>●●●</td> <td>1.000,00</td> <td>5.000,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> </tbody> </table>	Menu	Material Number	Name	Supplier material number	Stock	Min-Stock	Max-Stock	Total stock	Consignment stock	Fr		1463769	USB Stick für C99 (Backup)	TEST LIEF.MAT. AUS INFO	●●●	1.500,00	12.000,00	0,00	0,00			6084269060010	Radio control panel complete set		●●●	10,00	20,00	0,00	0,00			6143039089000	Workstation Z440 G1/HP(Power)		●●●	0,00	0,00	0,00	0,00			6084269152000	Control panel 26_SE, power ON mat		●●●	35,00	70,00	0,00	0,00			1463769	USB Stick for C99 (Backup)		●●●	1.000,00	5.000,00	0,00	0,00																																																																																														
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<ol style="list-style-type: none"> The detailed view shows the forecasted data, planned deliveries and already created VMI orders as well as the current stock development of the consignment warehouse. <p>The graphical representation displays the demands, orders and the stock development from the table above in graphical form.</p>	 <p>The screenshot shows the 'Forecast' view with a table and a 'Chart' view below it.</p> <p>Forecast Table:</p> <table border="1"> <thead> <tr> <th></th> <th>Current</th> <th>2025-03-27</th> <th>2025-03-28</th> <th>2025-03-29</th> <th>2025-03-30</th> <th>2025-03-31</th> <th>2025-04-01</th> <th>2025-04-02</th> <th>2025-04-03</th> <th>2025-04-04</th> <th>2025-04-05</th> <th>2025-04-06</th> <th>2025-04-07</th> <th>2025-04-08</th> <th>2025-04-09</th> <th>2025-04-10</th> </tr> </thead> <tbody> <tr> <td>Planned Deliveries</td> <td>-</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> </tr> <tr> <td>Forecast</td> <td>96,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Orders</td> <td>50,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>12,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>39,00</td> <td>30,00</td> <td>-</td> <td>-</td> </tr> <tr> <td>Min-Stock</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> </tr> <tr> <td>Max-Stock</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> </tr> <tr> <td>Current Stock</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>-25,00</td> <td>-55,00</td> <td>-55,00</td> <td>-55,00</td> </tr> <tr> <td>Revision State</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Change Number</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </tbody> </table> <p>Chart:</p> <p>The chart displays the stock development over time. The Y-axis ranges from -75 to 100. The X-axis shows dates from 2025-03-27 to 2025-04-10. The legend includes: Current Stock (blue line), Max-Stock (red line), Min-Stock (green line), Orders (yellow bars), and Forecast (green line). The Current Stock starts at 2,00 and increases to 14,00 by 2025-04-01, then drops to -25,00 by 2025-04-07 and remains there.</p>		Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06	2025-04-07	2025-04-08	2025-04-09	2025-04-10	Planned Deliveries	-	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Forecast	96,00	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Orders	50,00	-	-	-	-	-	12,00	-	-	-	-	-	39,00	30,00	-	-	Min-Stock	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00	14,00	-25,00	-55,00	-55,00	-55,00	Revision State	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	Change Number	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06	2025-04-07	2025-04-08	2025-04-09	2025-04-10																																																																																																																																										
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6.3 Creating of a VMI Replenishment Delivery (= VMI Order)

Instruction	View																																																																																																																					
<p>1. Click the "SCM" icon.</p> <p>2. Select "VMI".</p>	 <p>The screenshot shows a vertical menu with icons for SCM (truck), Direct Purchase Orders (hand), Delivery Call Off (hand), VMI (gear), ASN (hand), Forecast (hand), and Invoices (hand). The 'VMI' option is highlighted with a red box.</p>																																																																																																																					
<p>3. Select the material by clicking the magnifying glass icon to open the material's detail view.</p>	 <p>The screenshot shows the 'VMI Overview' page with a table of materials. The first row is highlighted with a magnifying glass icon.</p> <table border="1"> <thead> <tr> <th>Menu</th> <th>Material Number</th> <th>Name</th> <th>Supplier material number</th> <th>Stock</th> <th>Min-Stock</th> <th>Max-Stock</th> <th>Total stock</th> <th>Consignment stock</th> <th>Fr</th> </tr> </thead> <tbody> <tr> <td></td> <td>1463769</td> <td>USB Stick für C99 (Backup)</td> <td>TEST LIEF.MAT. AUS INFO</td> <td>***</td> <td>1.500,00</td> <td>12.000,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6084269060010</td> <td>Radio control panel complete set</td> <td></td> <td>***</td> <td>10,00</td> <td>20,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6143039089000</td> <td>Workstation Z440 G1/HP(Power)</td> <td></td> <td>***</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>6084269152000</td> <td>Control panel 26_SE, power ON mat</td> <td></td> <td>***</td> <td>35,00</td> <td>70,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> <tr> <td></td> <td>1463769</td> <td>USB Stick for C99 (Backup)</td> <td></td> <td>***</td> <td>1.000,00</td> <td>5.000,00</td> <td>0,00</td> <td>0,00</td> <td></td> </tr> </tbody> </table>	Menu	Material Number	Name	Supplier material number	Stock	Min-Stock	Max-Stock	Total stock	Consignment stock	Fr		1463769	USB Stick für C99 (Backup)	TEST LIEF.MAT. AUS INFO	***	1.500,00	12.000,00	0,00	0,00			6084269060010	Radio control panel complete set		***	10,00	20,00	0,00	0,00			6143039089000	Workstation Z440 G1/HP(Power)		***	0,00	0,00	0,00	0,00			6084269152000	Control panel 26_SE, power ON mat		***	35,00	70,00	0,00	0,00			1463769	USB Stick for C99 (Backup)		***	1.000,00	5.000,00	0,00	0,00																																																										
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<p>4. To create a VMI replenishment delivery (=VMI order), click the Edit  icon in the "Planned Deliveries" line for the appropriate date.</p>	 <p>The screenshot shows the 'Forecast' page with a table of data. The 'Planned Deliveries' row for the date 2025-04-03 is highlighted with a red box.</p> <table border="1"> <thead> <tr> <th></th> <th>Current</th> <th>2025-03-27</th> <th>2025-03-28</th> <th>2025-03-29</th> <th>2025-03-30</th> <th>2025-03-31</th> <th>2025-04-01</th> <th>2025-04-02</th> <th>2025-04-03</th> <th>2025-04-04</th> <th>2025-04-05</th> <th>2025-04-06</th> </tr> </thead> <tbody> <tr> <td>Planned Deliveries</td> <td>-</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> </tr> <tr> <td>Forecast</td> <td>96,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Orders</td> <td>50,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>12,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Min-Stock</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> </tr> <tr> <td>Max-Stock</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> </tr> <tr> <td>Current Stock</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> </tr> <tr> <td>Revision State</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Change Number</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </tbody> </table>		Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06	Planned Deliveries	-	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	Forecast	96,00	-	-	-	-	-	-	-	-	-	-	-	Orders	50,00	-	-	-	-	-	12,00	-	-	-	-	-	Min-Stock	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00	14,00	Revision State	-	-	-	-	-	-	-	-	-	-	-	-	Change Number	-	-	-	-	-	-	-	-	-	-	-	-
	Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06																																																																																																										
Planned Deliveries	-	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00																																																																																																										
Forecast	96,00	-	-	-	-	-	-	-	-	-	-	-																																																																																																										
Orders	50,00	-	-	-	-	-	12,00	-	-	-	-	-																																																																																																										
Min-Stock	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00																																																																																																										
Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00																																																																																																										
Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00	14,00																																																																																																										
Revision State	-	-	-	-	-	-	-	-	-	-	-	-																																																																																																										
Change Number	-	-	-	-	-	-	-	-	-	-	-	-																																																																																																										
<p>5. Select the date and enter the quantity.</p> <p>6. Click "Save".</p>	 <p>The screenshot shows the 'Forecast' page with a table of data. The 'Planned Deliveries' row for the date 2025-04-05 is highlighted with a red box, and the quantity '20' is entered in the cell.</p> <table border="1"> <thead> <tr> <th></th> <th>Current</th> <th>2025-03-27</th> <th>2025-03-28</th> <th>2025-03-29</th> <th>2025-03-30</th> <th>2025-03-31</th> <th>2025-04-01</th> <th>2025-04-02</th> <th>2025-04-03</th> <th>2025-04-04</th> <th>2025-04-05</th> <th>2025-04-06</th> </tr> </thead> <tbody> <tr> <td>Planned Deliveries</td> <td>-</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>0,00</td> <td>20</td> <td>0,00</td> </tr> <tr> <td>Forecast</td> <td>96,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Orders</td> <td>50,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>12,00</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Min-Stock</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> <td>30,00</td> </tr> <tr> <td>Max-Stock</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> <td>90,00</td> </tr> <tr> <td>Current Stock</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>2,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> <td>14,00</td> </tr> <tr> <td>Revision State</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> <tr> <td>Change Number</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> <td>-</td> </tr> </tbody> </table>		Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06	Planned Deliveries	-	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	20	0,00	Forecast	96,00	-	-	-	-	-	-	-	-	-	-	-	Orders	50,00	-	-	-	-	-	12,00	-	-	-	-	-	Min-Stock	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00	14,00	Revision State	-	-	-	-	-	-	-	-	-	-	-	-	Change Number	-	-	-	-	-	-	-	-	-	-	-	-
	Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-05	2025-04-06																																																																																																										
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Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00																																																																																																										
Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00	14,00																																																																																																										
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Change Number	-	-	-	-	-	-	-	-	-	-	-	-																																																																																																										

7. Click on the green plus symbol.

Forecast											
Forecast duration	15 days		<input type="button" value="Calculate"/>								
Base Date	2025-03-27										
	Current	2025-03-27	2025-03-28	2025-03-29	2025-03-30	2025-03-31	2025-04-01	2025-04-02	2025-04-03	2025-04-04	2025-04-06
Planned Deliveries	-	0	0	0	0	0	0	0	0	0	0
Forecast	96,00	-	-	-	-	-	-	-	-	-	-
Orders	50,00	-	-	-	-	-	12,00	-	-	-	-
Min-Stock	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00	30,00
Max-Stock	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00	90,00
Preview Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	34,00
Current Stock	2,00	2,00	2,00	2,00	2,00	2,00	14,00	14,00	14,00	14,00	14,00
Revision State	-	-	-	-	-	-	-	-	-	-	-
Change Number	-	-	-	-	-	-	-	-	-	-	-

8. Click "Save".

Create order

Material Number:	00000000001360922	Date:	2025-04-05
Current Stock:	14,00	Min-Stock:	30,00
Quantity:	20,00	Max-Stock:	90,00
New stock:	34,00		

Date:

Supplier material number:

9. Please wait a few seconds and then click the "Calculate" button. Now you will see the order you have created in the Orders line.

6.4 Change a VMI Order

Instruction	View
1. To do this, click the row with the blue header for "Orders" in the Preview area of the Details view.	
2. Select the VMI order and click the folder icon.	

3. The following changes can be made

1. The quantity can be changed.
2. The delivery date can be changed.
3. The quantity can be split.
4. Click on "Save and send back" to send your change back to ZEISS.
5. Click on "Storno" button to cancel the WMI Order.

Incidentally apply our "General Terms and Conditions for the Purchase of Goods" which you can find or print at the following internet-link <http://www.zeiss.de/impressum>.

We require an order acknowledgment for the following items:

Pos.	Material # Description	Quantity	Unit	Price/Unit	Requested delivery date	Delivery date [YYYY-MM-DD]	Confirmation	Net value [EUR]
00010	Material #: 900000000001369922 Material: Prisma 12,7mm 1930mm, Rohzell							
	Your material number: 1201632	12,00	ST		2025-04-01	2025-04-01	<input checked="" type="checkbox"/>	split

This document is valid without signature.

Customer files
4511159765.pdf (2025-03-26)

Supplier confirmation number:

Upload confirmation as CSV no file chosen

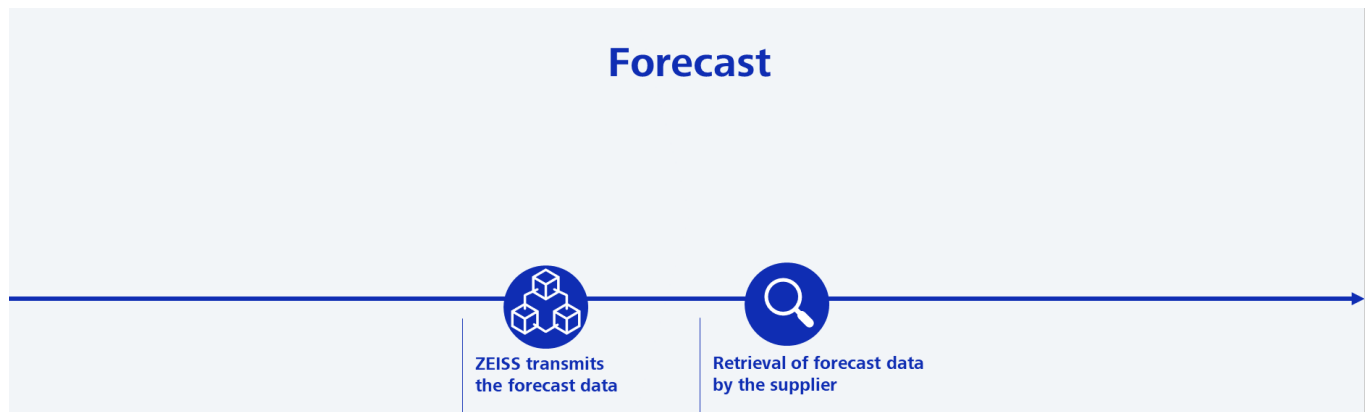
(Last sent back: never)

7 Forecast

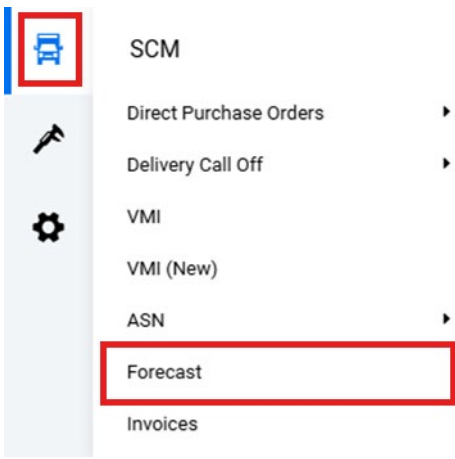
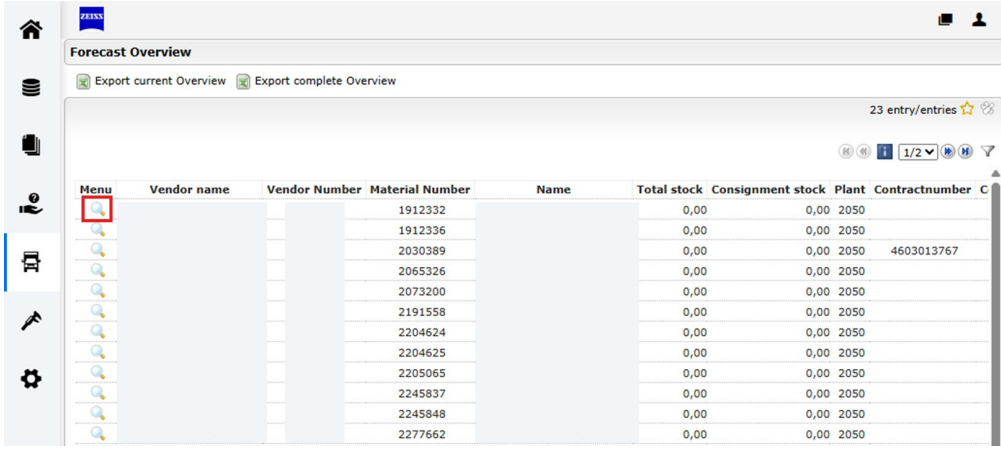
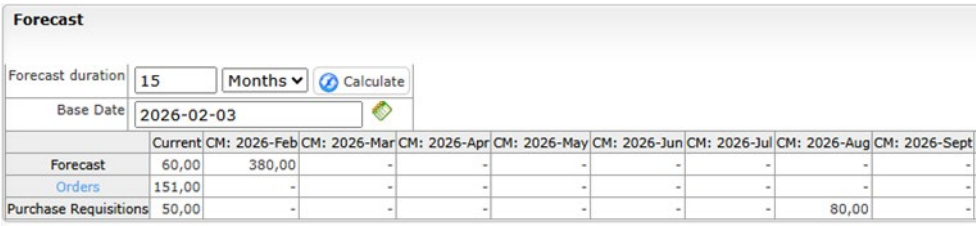
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7.1 Process Diagram

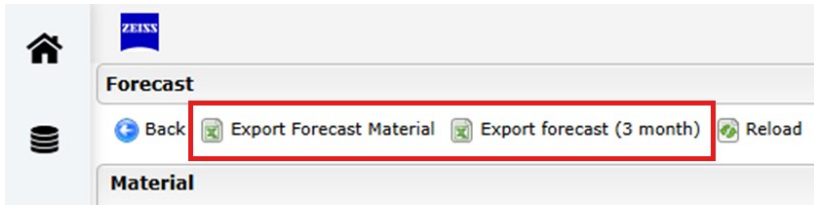
ZEISS uses the forecast functionality to make the forecast available to suppliers. The current forecast data is transmitted by ZEISS and can be viewed by the supplier via the supplier portal. In contrast to the VMI module, the forecast functionality only includes the transmission and retrieval of the forecast.



7.2 Forecast Overview

Instruction	View
<p>1. Click the „SCM“ icon.</p> <p>2. Select Forecast.</p>	
<p>3. Select the material by clicking on the magnifying glass icon to open the detail view of the material.</p>	
<p>4. The detailed table view shows the demand, the open purchase orders and the open purchase requisitions.</p>	 <p>i Forecast = all demands Orders = open Purchas Orders Purchase Requisitions = open Purchase Requisitions</p>

5. The forecast can be exported in Excel format using the export buttons.



8 Quality Data Exchange (QDX)

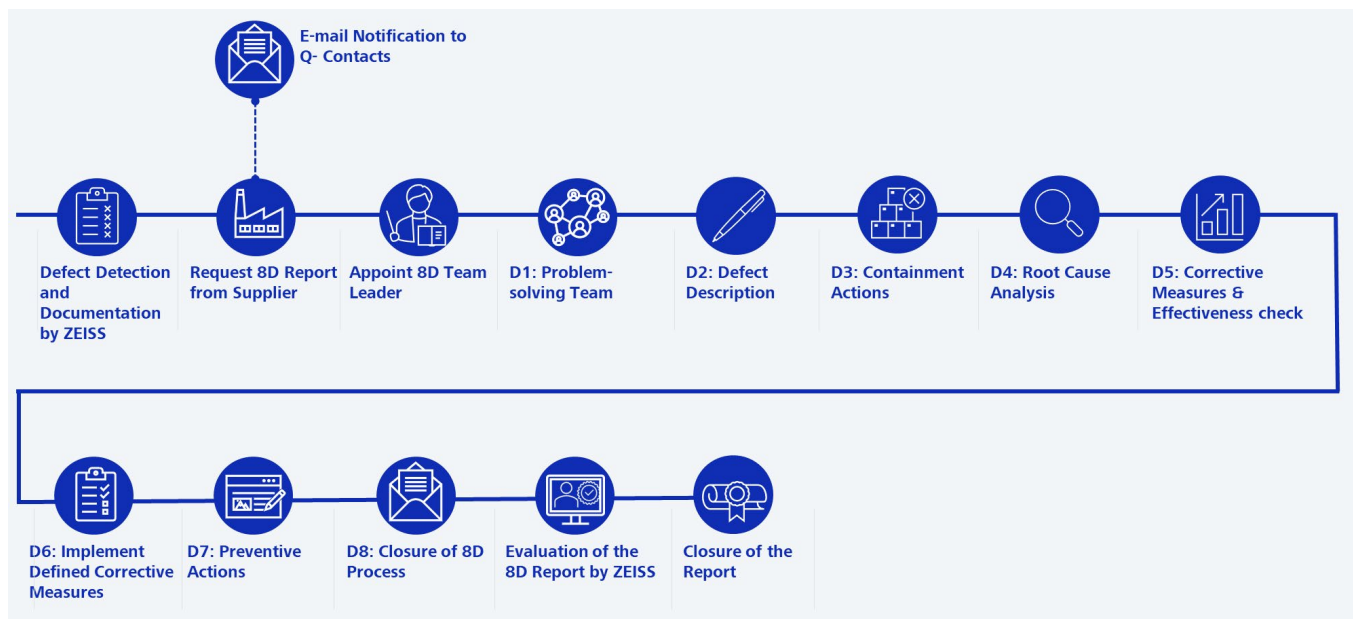
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8.1 Process Diagram

Complaints created by ZEISS can be processed digitally via the QDX module. There are three different types of reports/complaints.

1. Short confirmation
2. 5D Report
3. 8D Report

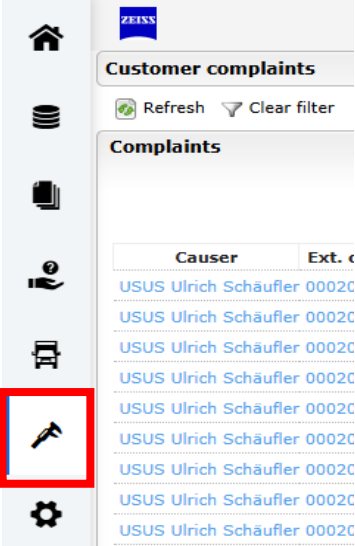
The name 8D results from the 8 steps (or disciplines) which this method includes. It is a structured problem-solving method, which aims a sustainable stop of defects and problems. For this the basic reasons causing the defects will be analyzed and permanently stopped. Containment actions protect the customer against defective parts, during the problem-solving process. Prevention actions against defect repetition ensure that similar or equal defects do not happen at other places in the company.



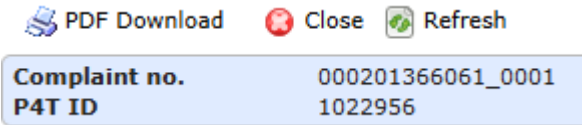
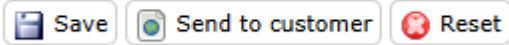
8.2 E-mail Notification in the event of a Complaint

Instruction	View								
<p>Once a new complaint is created you will automatically receive an e-mail.</p>	<div data-bbox="652 378 1295 860" style="border: 1px solid black; padding: 10px; margin-bottom: 20px;"> <p>Dear Sir or Madam,</p> <p>You have received a new complaint from a Carl Zeiss Business Unit</p> <p>No: 000201067644_0001</p> <p>Contact: Zeiss employee</p> <p>Material: 000000-0000-000 Example material</p> <p>Failure description: Example error description</p> <p>Please check and maintain it in our web portal by using the following link: https://www.pool4tool.com/complaint.php?action=show&recl_id=958188</p> <p>with kind regards,</p> <p>Zeiss employee, Carl Zeiss Business Unit</p> </div> <table border="0"> <tr> <td data-bbox="480 898 528 927">No.</td> <td data-bbox="794 898 1449 1032">process number for this complaint (ZEISS SAP complaint number is contained here – from the example above: 201067644)</td> </tr> <tr> <td data-bbox="480 1039 580 1068">Contact</td> <td data-bbox="794 1039 1449 1106">contact person for the respective ZEISS Business Unit for this complaint</td> </tr> <tr> <td data-bbox="480 1113 584 1142">Material</td> <td data-bbox="794 1113 1449 1180">ZEISS material number (13 digits) und ZEISS material designation</td> </tr> <tr> <td data-bbox="480 1187 703 1216">Failure description</td> <td data-bbox="794 1187 1366 1216">short description of the occurred error pattern</td> </tr> </table>	No.	process number for this complaint (ZEISS SAP complaint number is contained here – from the example above: 201067644)	Contact	contact person for the respective ZEISS Business Unit for this complaint	Material	ZEISS material number (13 digits) und ZEISS material designation	Failure description	short description of the occurred error pattern
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Contact	contact person for the respective ZEISS Business Unit for this complaint								
Material	ZEISS material number (13 digits) und ZEISS material designation								
Failure description	short description of the occurred error pattern								

8.3 Access a Complaint

Instruction	View
<p>To open the overview of all complaints, click on the "calipers" icon.</p>	

8.3.1 Navigation

Instruction	View				
<p>In the upper part of a message, you will find the option to save the complaint as PDF, close it or reload the report window.</p>	 <table border="1" data-bbox="683 1294 1267 1364"> <tr> <td>Complaint no.</td> <td>000201366061_0001</td> </tr> <tr> <td>P4T ID</td> <td>1022956</td> </tr> </table>	Complaint no.	000201366061_0001	P4T ID	1022956
Complaint no.	000201366061_0001				
P4T ID	1022956				
<p>In the lower part of each report, you will find the button to save and return the message to ZEISS. You can save each step individually by using the "Save"-button without having to transfer the data ZEISS. For this purpose, under every single step there is given an additional "Save"-</p>					

button. Only if the supplier uses the button „Send to customer“, the registered information is transferred to ZEISS.

Status:
In each of the 5 or 8 steps, the status (ok, critical or endangered) can be selected. It will be displayed with traffic lights.

Finished:
After entering all required information for D1-D8, the step can be completed by checking the box. If all steps are checked, the 8D report and the complaint can be completed.

Step 1: Team - Status: finished:

8.3.2 Header

Instruction	View																						
<p>In the header you will find various details of the complaint.</p>	<table border="1" data-bbox="464 367 1479 405"> <tr> <td>Complaint no.</td> <td>000201258639_0001</td> <td>Created</td> <td>2023-09-28 06:23</td> <td>Created by</td> <td></td> </tr> <tr> <td>P4T ID</td> <td>1020734</td> <td>Modified</td> <td>2023-09-28 06:24</td> <td>Modified by</td> <td></td> </tr> </table> <table border="0" data-bbox="464 461 1134 645"> <tr> <td>Complaint no.</td> <td>Complaint number ZEISS</td> </tr> <tr> <td>Created</td> <td>creation date</td> </tr> <tr> <td>Created by</td> <td>ZEISS Creator</td> </tr> <tr> <td>Modified</td> <td>modification date</td> </tr> <tr> <td>Modified By</td> <td>Complaint user last edited</td> </tr> </table>	Complaint no.	000201258639_0001	Created	2023-09-28 06:23	Created by		P4T ID	1020734	Modified	2023-09-28 06:24	Modified by		Complaint no.	Complaint number ZEISS	Created	creation date	Created by	ZEISS Creator	Modified	modification date	Modified By	Complaint user last edited
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Created	creation date																						
Created by	ZEISS Creator																						
Modified	modification date																						
Modified By	Complaint user last edited																						

8.3.3 Customer Information

Instruction	View																																																																
<p>The customer information provides important details about the report.</p>	<div data-bbox="459 920 1479 1323" data-label="Complex-Block"> <p>Customer information ? ◀</p> <table border="0" data-bbox="459 976 1479 1014"> <tr> <td>Title</td> <td>Test Jaggaer</td> <td>Process:</td> <td>Supplier complaint</td> <td style="text-align: right;">Status Running</td> </tr> <tr> <td>Appearance Date</td> <td>2023-09-28</td> <td>Appearance time</td> <td colspan="2">06:21</td> </tr> </table> <table border="1" data-bbox="459 1014 1479 1059"> <thead> <tr> <th>Complaint position</th> <th>GR no.</th> <th>GR date</th> <th>AN#</th> <th>Material no.</th> <th>Material name</th> <th>GR amount</th> <th>Contested</th> <th>Acknowledged</th> <th>Returned</th> <th>Stock</th> </tr> </thead> <tbody> <tr> <td></td> <td>0000-00-00</td> <td></td> <td></td> <td></td> <td></td> <td>2,00</td> <td>2,00</td> <td style="border: 1px solid black;">0,00</td> <td>0,00</td> <td>0,00</td> </tr> </tbody> </table> <p>File</p> <p>Test Word Dokument.pdf (14.42 Kb) (2023-10-10 16:41) Test Word Dokument.pdf (14.42 Kb) (2023-10-10 16:41)</p> <p>Decline comment</p> <p>Receipt number/position 4511037773 / 00010</p> <p>Self announcement No</p> <p>Customer</p> <p>Caused by 5518290 USUS Ulrich Schäufier Dipl.-Wirt.-Ing.(FH)</p> <p>Team leader</p> <p>Phase 0km0hours</p> <p>Location CZ IMT GmbH Werk Oberkochen (1014)</p> <p>Referred complaints</p> <table border="0" data-bbox="630 1227 1479 1272"> <tr> <td style="text-align: center;">Ext. complaint no.</td> <td style="text-align: center;">Complaints</td> <td style="text-align: center;">Menu</td> </tr> <tr> <td style="border: 1px solid gray; width: 200px; height: 15px;"></td> <td></td> <td></td> </tr> </table> <p style="text-align: left;"> ADD Save </p> </div> <table border="0" data-bbox="464 1391 1425 1951"> <tr> <td>Title</td> <td>Short error description</td> </tr> <tr> <td>Process</td> <td>Type of operation</td> </tr> <tr> <td>Status</td> <td>Status of the complain</td> </tr> <tr> <td>Material no.</td> <td>ZEISS material number</td> </tr> <tr> <td>Material name</td> <td>ZEISS material name</td> </tr> <tr> <td>GR amount</td> <td>Ordered amount</td> </tr> <tr> <td>Contested</td> <td>Number of complained parts</td> </tr> <tr> <td style="color: red;">Acknowledged</td> <td style="color: red;">Number of complained parts acknowledged by the supplier</td> </tr> <tr> <td>Returned</td> <td>Number of parts sent back to supplier</td> </tr> <tr> <td>File</td> <td>Attachment to the complaint</td> </tr> <tr> <td>Decline Comment</td> <td>Comment if the supplier feedback is decline by ZEISS</td> </tr> <tr> <td>Caused by</td> <td>Supplier number and supplier name</td> </tr> <tr> <td>Team leader</td> <td>Contact person at ZEISS for this complaint</td> </tr> </table>	Title	Test Jaggaer	Process:	Supplier complaint	Status Running	Appearance Date	2023-09-28	Appearance time	06:21		Complaint position	GR no.	GR date	AN#	Material no.	Material name	GR amount	Contested	Acknowledged	Returned	Stock		0000-00-00					2,00	2,00	0,00	0,00	0,00	Ext. complaint no.	Complaints	Menu				Title	Short error description	Process	Type of operation	Status	Status of the complain	Material no.	ZEISS material number	Material name	ZEISS material name	GR amount	Ordered amount	Contested	Number of complained parts	Acknowledged	Number of complained parts acknowledged by the supplier	Returned	Number of parts sent back to supplier	File	Attachment to the complaint	Decline Comment	Comment if the supplier feedback is decline by ZEISS	Caused by	Supplier number and supplier name	Team leader	Contact person at ZEISS for this complaint
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Acknowledged	Number of complained parts acknowledged by the supplier																																																																
Returned	Number of parts sent back to supplier																																																																
File	Attachment to the complaint																																																																
Decline Comment	Comment if the supplier feedback is decline by ZEISS																																																																
Caused by	Supplier number and supplier name																																																																
Team leader	Contact person at ZEISS for this complaint																																																																

8.3.4 Problem Description

Instruction	View																																										
<p>Please fill in all the necessary data.</p>	<div data-bbox="470 369 1481 627" style="border: 1px solid #ccc; padding: 5px;"> <p>Problem Description (Definition / Customer) ? ←</p> <p>PPM relevance -</p> <p>Problem Description Test</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">test</th> <th style="width: 30%;">Short description</th> <th style="width: 20%;">Category 1</th> <th style="width: 20%;">Description</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center;">Containment action(s)</td> </tr> <tr> <td colspan="2" style="text-align: center;">Containment action(s)</td> <td style="text-align: center;">Start date</td> <td style="text-align: center;">End date</td> </tr> <tr> <td colspan="2" style="text-align: center;">Status</td> <td style="text-align: center;">Start time</td> <td style="text-align: center;">End time</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="6" style="text-align: left;">Required response</th> </tr> <tr> <th style="width: 15%;">Response type</th> <th style="width: 15%;">Answer expected until</th> <th style="width: 10%;">Action</th> <th style="width: 10%;">Finished until</th> <th style="width: 10%;">Step</th> <th style="width: 15%;">Finished until</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>Usage decision</p> </div> <table style="width: 100%;"> <tr> <td style="width: 30%;">Priority</td> <td>Classification of the complaint by ZEISS</td> </tr> <tr> <td>Problem Description</td> <td>Detailed description of the error</td> </tr> <tr> <td>Required response</td> <td>Short confirmation, 5D-Report or 8D-Report Expected</td> </tr> <tr> <td></td> <td>End date of the single steps</td> </tr> </table>	test	Short description	Category 1	Description	Containment action(s)				Containment action(s)		Start date	End date	Status		Start time	End time	Required response						Response type	Answer expected until	Action	Finished until	Step	Finished until							Priority	Classification of the complaint by ZEISS	Problem Description	Detailed description of the error	Required response	Short confirmation, 5D-Report or 8D-Report Expected		End date of the single steps
test	Short description	Category 1	Description																																								
Containment action(s)																																											
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Status		Start time	End time																																								
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Problem Description	Detailed description of the error																																										
Required response	Short confirmation, 5D-Report or 8D-Report Expected																																										
	End date of the single steps																																										

8.3.5 Actual Complaint Handling

All fields marked with an asterisk (*) are **mandatory**.

The response times for the supplier are defined in the disciplines. If the deadlines for D1-D3, D4 or D5-D8 are exceeded, a dunning system is activated.

The time limits for answering vary between ZEISS units. Example of Carl ZEISS IQS:

D1 - D3: 5 calendar days

D4: 20 calendar days

D5 - D8: 30 calendar days

8.3.6 Short Confirmation

A short confirmation is required for error patterns with minor effects for ZEISS or error patterns which can be fixed at ZEISS. Therefore, there is no product returned to the supplier.

Instruction	View
<p>Please fill in all the necessary data.</p>	<div style="text-align: center; border: 1px solid #ccc; padding: 10px;"> <p>Short confirmation</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>Short confirmation ? ☰</p> <p>Statement* <input style="width: 50px;" type="text" value="-"/> ▼</p> <p>Comment <input style="width: 100%; height: 30px;" type="text"/></p> </div> <p>Statement Status of the complaint: Accepted (Supplier fault) or Deny (Zeiss Fault)</p> <p>Comment Text box for the supplier to provide a reason or additional information to ZEISS</p> </div>

8.4 5D Report

The 5D report have been drawn up based on the 8D methodology. There are 5 disciplines available to complete the 5D report by the supplier. The disciplines "Chosen Corrective Action(s)" (D5) and "Implemented Corrective Action(s)" (D6) are compiled in one step. The steps „Preventive Action(s)" (D7) and „Project Completion" (D8) are excluded in the 5D report. In the 5D report, 5 disciplines are available to the supplier, based on the 8D methodology. The disciplines for "Chosen corrective Action(s)" (D5) and "Implemented Corrective Action(s)" (D6) are summarized. The steps "Preventive Actions" (D7) and "Project Completion" (D8) are not included in the 5D Report.

8.4.1 Step 1 (D1): Team

The goal of this step is to define a problem-solving team by the 8D leader. Therefore, various team members are appointed who can support the problem-solving process with methodological or technical knowledge.

Instruction	View
<p>Please fill in all the necessary data.</p>	<div data-bbox="464 913 1481 1055" style="border: 1px solid #ccc; padding: 5px;"> <p>Step 1: Team - Status: <input type="text"/> finished: <input type="checkbox"/></p> <p>Teamleader* <input type="text" value="Martin M"/> Teammembers <input type="text"/> <input type="button" value="+"/></p> <p><input type="button" value="Save"/></p> </div> <p>Status In each of the 5 or 8 steps, a status can be selected. (ok, at risk or critical)</p> <p>Finished After all required information have been entered, the respective step (D1-D8) can be completed with this check mark set. If this check marks are set for all steps, the complaint can be completed.</p> <p>Teamleader Name of the 8D report team leader</p> <p>Teammembers Name of the 8D report team member/s Employees that have been part of an 8D Team earlier can be selected by using the upper Drop-Down-Menu and be added with the + sign. New team members can be added with the lower text box.</p>

8.4.2 Step 2 (D2): Problem Description (Definition)

The aim of the step is to describe the problem by a complete, comprehensible and clear problem description. It is based on the error description from ZEISS and lays the foundation for the quality of the root cause analysis (D4).

Instruction	View						
<p>Please fill in all the necessary data.</p>	<div data-bbox="464 510 1485 770" style="border: 1px solid #ccc; padding: 5px;"> <p>Step 2: Problem Description (Definition) - Status: <input type="text"/> finished: <input type="checkbox"/></p> <p>Status* <input type="text" value="Pending"/></p> <p>Problem Description* <input style="width: 100%; height: 40px;" type="text"/></p> <p>File <input type="button" value="Choose File"/> No file chosen</p> <p><input type="button" value="Save"/></p> </div> <table> <tr> <td data-bbox="475 842 568 875">Status*</td> <td data-bbox="810 842 1469 981">Additionally to the status for the single steps a status (Accepted, Not accepted, or Pending) for the whole complaint must be set. (The accepted amount of complaint parts must be entered in the header)</td> </tr> <tr> <td data-bbox="475 987 740 1021">Problem Description*</td> <td data-bbox="810 987 1433 1055">Text box to enter a complete, comprehensible and problem description</td> </tr> <tr> <td data-bbox="475 1061 523 1095">File</td> <td data-bbox="810 1061 1453 1200">By using the button „Select file“ a file can be added to the step. Possible file types are: MS Excel/Word, JPG, PDF, TIF This option is available for every single step.</td> </tr> </table>	Status*	Additionally to the status for the single steps a status (Accepted, Not accepted, or Pending) for the whole complaint must be set. (The accepted amount of complaint parts must be entered in the header)	Problem Description*	Text box to enter a complete, comprehensible and problem description	File	By using the button „Select file“ a file can be added to the step. Possible file types are: MS Excel/Word, JPG, PDF, TIF This option is available for every single step.
Status*	Additionally to the status for the single steps a status (Accepted, Not accepted, or Pending) for the whole complaint must be set. (The accepted amount of complaint parts must be entered in the header)						
Problem Description*	Text box to enter a complete, comprehensible and problem description						
File	By using the button „Select file“ a file can be added to the step. Possible file types are: MS Excel/Word, JPG, PDF, TIF This option is available for every single step.						

8.4.3 Step 3 (D3): Containment Action(s)









Containment actions act as "emergency management" and protect ZEISS from the effects of a problem until it is solved sustainably. These measures should be aligned with ZEISS and must be maintained and periodically tested for effectiveness until the permanent corrective actions in step D6 are effectively implemented. A distinction is made between emergency measures at the customer and at the supplier.

Step 3: Containment Actions (s) - Status: Finished:

Containment action(s) at customer	Description	Effect	% Effectiveness	Start date	End date
			Status	Start time	End time
	<input type="button" value="ADD"/>				

Containment action(s) at supplier	Description
	Bestand im gesamten Wertstrom des Lieferanten hinsichtlich des reklamierten Fehlermerkmals geprüft und bewertet / Stock along supplier's value stream concerning this non-conformity has been inspected and evaluated
	<input type="button" value="ADD"/>

Effect	Effectiveness	Start date	End date	Finish date	Responsible	File	Menu
	Status	Start time	End time	Production start	Affected parts		
	0%						<input type="button" value="EDIT"/>

Instruction	View																										
<p>Click "ADD"- to create a new action. Specify all data.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Description* <input style="width: 100%;" type="text"/></p> <p>Effect <input style="width: 100%;" type="text"/></p> <p>% Effectiveness <input style="width: 50%;" type="text"/></p> <p>Affected parts <input style="width: 100%;" type="text"/></p> <p>Status Planned ▾</p> <p>Start date <input style="width: 100%;" type="text"/>  </p> <p>Start time <input style="width: 50%;" type="text"/> (HH:MM)</p> <p>Planned end date <input style="width: 100%;" type="text"/>  </p> <p>End time <input style="width: 50%;" type="text"/> (HH:MM)</p> <p>Finish date <input style="width: 100%;" type="text"/>  </p> <p>Production start <input style="width: 100%;" type="text"/>  </p> <p>Responsible Martin M ▾</p> <p>File Choose File No file chosen</p> <p style="text-align: right;"> Save Save & Next Close </p> </div> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;">Description</td> <td>Description of the containment action</td> </tr> <tr> <td>Effect</td> <td>Description of the effect (validation)</td> </tr> <tr> <td>% Effectiveness</td> <td>percentage effectiveness of the action</td> </tr> <tr> <td>Affected parts</td> <td>Indication of the affected parts</td> </tr> <tr> <td>Status</td> <td>Current status Planned/Running/Done</td> </tr> <tr> <td>Start date</td> <td>Text box for starting date</td> </tr> <tr> <td>Start time</td> <td>Text box for starting time</td> </tr> <tr> <td>Planned end date</td> <td>Text box for planned end date</td> </tr> <tr> <td>End time</td> <td>Text box for end time</td> </tr> <tr> <td>Finish date</td> <td>Text box for finish date</td> </tr> <tr> <td>Production start</td> <td>Text box for production start date</td> </tr> <tr> <td>Responsible</td> <td>Indication of the responsible person</td> </tr> <tr> <td>File</td> <td>Adding a file</td> </tr> </table>	Description	Description of the containment action	Effect	Description of the effect (validation)	% Effectiveness	percentage effectiveness of the action	Affected parts	Indication of the affected parts	Status	Current status Planned/Running/Done	Start date	Text box for starting date	Start time	Text box for starting time	Planned end date	Text box for planned end date	End time	Text box for end time	Finish date	Text box for finish date	Production start	Text box for production start date	Responsible	Indication of the responsible person	File	Adding a file
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Finish date	Text box for finish date																										
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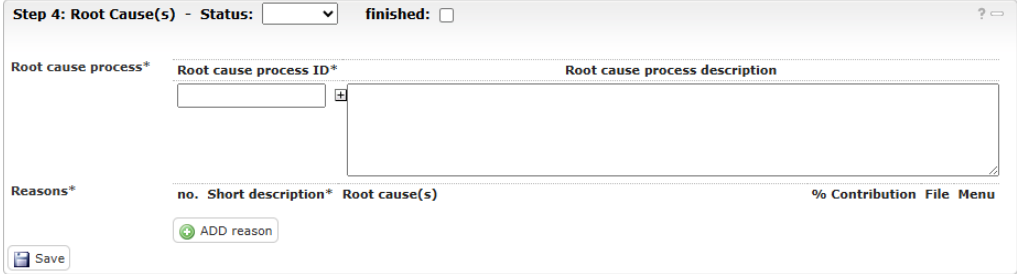
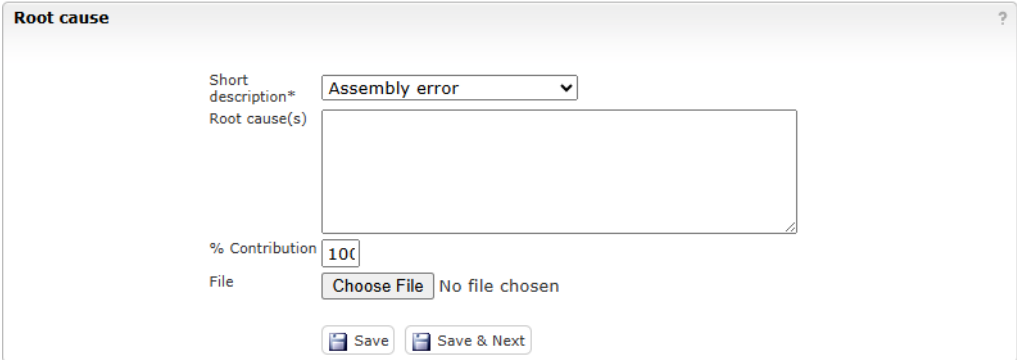
The emergency measure "stock along supplier's value stream concerning this non-conformity has been inspected and evaluated" is set by default and must always be carried out.

Other examples of emergency measures include:

- Prevent delivery of defective parts to the customer
- Inspect, sort and rework already manufactured products
- Document changes (interim work plans, inspection plans...)
- Introduce additional testing and demonstrate effectiveness
- Replacement delivery of specification compliant parts

8.4.4 Step 4 (D4): Root Cause(s)

This step includes the analysis of the root causes that cause the problem. The overall result of the problem-solving process significantly depends on this step because the assumption of false root causes result to insufficient countermeasures in the subsequent steps. As a result of the step, the root causes are identified and confirmed by cause-and-effect relationships. The problems can be explained by the root causes.

Instruction	View
<p>Please fill in all the necessary data.</p>	 <p>The screenshot shows a web form titled "Step 4: Root Cause(s)". It includes a status dropdown set to "finished" and a "finished" checkbox. The form has two main sections: "Root cause process*" and "Reasons*". The "Root cause process*" section contains a "Root cause process ID*" input field with a "+" icon and a "Root cause process description" text area. The "Reasons*" section has a table with columns for "no.", "Short description*", "Root cause(s)", and "% Contribution", along with "File" and "Menu" options. There is an "ADD reason" button and a "Save" button.</p> <p>Root cause process ID identifier of the incorrect process (add with +)</p> <p>Root cause process description description of the incorrect process</p>
<p>To create a new reason, press the "ADD" button.</p>	 <p>The screenshot shows a web form titled "Root cause". It includes a "Short description*" dropdown menu with "Assembly error" selected. Below it is a "Root cause(s)" text area. There is a "% Contribution" input field with "100" entered and a "File" section with a "Choose File" button and "No file chosen" text. At the bottom are "Save" and "Save & Next" buttons.</p> <p>Short description Selection of cause categories from present catalog</p> <p>Cause Indication of the detailed cause</p> <p>% Contribution Indication what percentage of the cause is responsible for the error that occurred</p> <p>File Insert a file attachment</p>

Various methods can be used to conduct the analysis of the root cause. Examples are:

- Cause-and-Effect diagram (also called fishbone diagram or Ishikawa diagram)
- 5-Why questioning technique

8.4.5 Step 5 (D5 + D6): Implemented Corrective Action(s)

This step implied the definition and implementation of corrective actions to eliminate permanently the root cause of the problem. The effectiveness of the defined actions must be proved by inspections and tests. In addition, the actions must be announced and established in the company by renewed processes or instructions.

The containment actions of step 3 shall be canceled once the effectiveness of the measures is proven.

(only applies for 5D reports.)

Instruction	View																		
<p>Use "Add" to create a new corrective action. Enter all information in the window.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 25%;"> <p>Root cause</p> <p>Short description*</p> <p>Description</p> <p>Status</p> <p>Start date</p> <p>Planned end date</p> <p>Production start</p> <p>Responsible</p> <p>File</p> </div> <div style="width: 70%;"> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;">-</p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"></p> <div style="border: 1px solid #ccc; height: 60px; margin-bottom: 5px;"></div> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;">Planned</p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"></p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;"></p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;">USUS Supplier</p> <p style="border-bottom: 1px solid #ccc; margin-bottom: 5px;">Choose File No file chosen</p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> Save Save & Next Close </div> </div> </div> <div style="margin-top: 20px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;">Root cause</td> <td>Select the cause for the corrective action</td> </tr> <tr> <td>Short description</td> <td>Generic term of the description</td> </tr> <tr> <td>Description</td> <td>Description of the corrective action</td> </tr> <tr> <td>Status</td> <td>Status of the corrective action</td> </tr> <tr> <td>Start date</td> <td>Start date of the corrective action</td> </tr> <tr> <td>Planned end date</td> <td>Planned end date</td> </tr> <tr> <td>Production start</td> <td>Start of production (of potential new parts /versions)</td> </tr> <tr> <td>Responsible</td> <td>Responsible person for the corrective action</td> </tr> <tr> <td>File</td> <td>File attachment</td> </tr> </table> </div> </div>	Root cause	Select the cause for the corrective action	Short description	Generic term of the description	Description	Description of the corrective action	Status	Status of the corrective action	Start date	Start date of the corrective action	Planned end date	Planned end date	Production start	Start of production (of potential new parts /versions)	Responsible	Responsible person for the corrective action	File	File attachment
Root cause	Select the cause for the corrective action																		
Short description	Generic term of the description																		
Description	Description of the corrective action																		
Status	Status of the corrective action																		
Start date	Start date of the corrective action																		
Planned end date	Planned end date																		
Production start	Start of production (of potential new parts /versions)																		
Responsible	Responsible person for the corrective action																		
File	File attachment																		

8.5 8D Report







All steps of the 8D methodology are used in the 8D report to analyze the error that have occurred. In contrast to the 5D report, the steps "Chosen Corrective Action(s)" (D5) and "Implemented Corrective Action(s)" (D6) are considered individually. The steps "Preventive Action(s)" (D7) and "Project Completion" are used additionally in the 8D report.

The structure and content of the steps D1 – D4 are the same as mentioned in the 5D report and would therefore not need to be repeated in this section.

8.5.1 Step 5 (D5): Planned Corrective Action(s)

This step implied the definition of corrective actions to eliminate permanently the root cause of the problem. The effectiveness of the defined actions must be proved by inspections and tests. In addition, it is important that the corrective actions at least do not cause undesirable side effects. The result of the step is a plan with defined and proven corrective actions, responsibilities and deadlines.

The containment actions introduced in step D3 need to be maintained here.

Instruction	View												
<p>To create a new planned corrective action, press the "ADD" button and fill in the required data in the displayed window.</p>	<div style="border: 1px solid #ccc; padding: 10px;"> <p>Root cause <input type="text" value="-"/></p> <p>Short description* <input type="text"/></p> <p>Description <input style="width: 100%; height: 40px;" type="text"/></p> <p>Effect <input style="width: 100%; height: 40px;" type="text"/></p> <p>% Effectiveness <input type="text"/></p> <p>Priority <input type="text" value="low"/></p> <p>Status <input type="text" value="Planned"/></p> <p>Start date <input type="text"/>  </p> <p>Planned end date <input type="text"/>  </p> <p>Production start <input type="text"/>  </p> <p>Responsible <input type="text" value="Martin M"/></p> <p>File <input type="button" value="Choose File"/> No file chosen</p> <p style="text-align: right;"> <input type="button" value="Save"/> <input type="button" value="Save & Next"/> <input type="button" value="Close"/> </p> </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; padding-bottom: 5px;">Root cause</td> <td>Select the root cause for the corrective action</td> </tr> <tr> <td style="padding-bottom: 5px;">Short description</td> <td>Generic term of the description</td> </tr> <tr> <td style="padding-bottom: 5px;">Description</td> <td>Detailed description of the planned corrective action</td> </tr> <tr> <td style="padding-bottom: 5px;">Effect</td> <td>Evidence of the effectiveness of the implemented measures</td> </tr> <tr> <td style="padding-bottom: 5px;">% Effectiveness</td> <td>Indication what percentage the corrective action contributes to the correction of the detected cause</td> </tr> <tr> <td style="padding-bottom: 5px;">Priority</td> <td>Priority of the planned corrective action</td> </tr> </table>	Root cause	Select the root cause for the corrective action	Short description	Generic term of the description	Description	Detailed description of the planned corrective action	Effect	Evidence of the effectiveness of the implemented measures	% Effectiveness	Indication what percentage the corrective action contributes to the correction of the detected cause	Priority	Priority of the planned corrective action
Root cause	Select the root cause for the corrective action												
Short description	Generic term of the description												
Description	Detailed description of the planned corrective action												
Effect	Evidence of the effectiveness of the implemented measures												
% Effectiveness	Indication what percentage the corrective action contributes to the correction of the detected cause												
Priority	Priority of the planned corrective action												

Status	Status of the planned corrective action
Start date	Start date of the planned corrective action
Planned end date	Planned end date of the planned corrective action
Production start	Start of production (of potential new parts /versions)
Responsible	Responsible person for the planned corrective action
File	File attachment (e.g. action plan)







8.5.2 Step 6 (D6) Implemented Corrective Action(s)

The proven corrective actions from step D5 are transferred to definitive solutions in this step and thus are firmly established in the company. The result of this step are the creation of renewed process instructions or new specifications and adequate training records.

The containment actions of step 3 shall be canceled once the effectiveness of the measures is proven.

Step 6: Implemented Corrective Action(s) - Status: Finished:

Implemented corrective action(s)	Root cause	Short description* Description	Status	Start date Planned end date	Production start	Responsible	File	Menu
<input type="button" value="ADD"/>								
<input type="button" value="Save"/>								

Instruction	View
Use "Add" to create a new implemented corrective action. Enter all information in the window. Here it is also possible to create further planned corrective actions.	<p>Root cause <input type="text" value="- v"/></p> <p>Short description* <input type="text"/></p> <p>Description <input type="text"/></p> <p>Status <input type="text" value="Planned v"/></p> <p>Start date <input type="text"/>  </p> <p>Planned end date <input type="text"/>  </p> <p>Production start <input type="text"/>  </p> <p>Responsible <input style="border: none; border-bottom: 1px solid black; width: 100%;" type="text" value="Martin M"/></p> <p>File <input type="button" value="Choose File"/> No file chosen</p> <p> <input type="button" value="Save"/> <input type="button" value="Save & Next"/> <input type="button" value="Close"/> </p>
	<p>Root cause Select the root cause for the implemented corrective action</p> <p>Short description Generic term of the description</p> <p>Description Description of the implemented corrective action</p> <p>Status Status of the implemented corrective action</p> <p>Start date Start date of the implemented corrective action</p> <p>Planned end date Planned end date of the implemented corrective action</p>

	Production start	Start of production (of potential new parts /versions)
	Responsible	Responsible person for the implemented corrective action
	File	File attachment





8.5.3 Step 7 (D7): Preventive Action(s)

In Step D7 the gained knowledge can be used to derive improvement measures instead of finding a solution to a specific problem as in steps D5 and D6. It is examined whether the same or similar problems can occur to further products or other locations.

The preventive actions cannot be equated with the actions in steps D5 and D6. The actions do not belong to the specific problem.

Step 7: Preventive Action(s) - Status: Finished:

Preventive action(s)	Root cause	Short description* Description	Status Priority	Start date Planned end date	Responsible	File Menu
<input type="button" value="ADD"/>						
<input type="button" value="Save"/>						


Instruction	View
Use "Add" to create a new corrective action. Enter all information in the window.	<p>Root cause: <input type="text" value="-"/></p> <p>Short description*: <input type="text"/></p> <p>Description: <input type="text"/></p> <p>Priority: <input type="text" value="low"/></p> <p>Status: <input type="text" value="Planned"/></p> <p>Start date: <input type="text"/>  </p> <p>Planned end date: <input type="text"/>  </p> <p>Responsible: <input type="text" value="Martin M"/></p> <p>File: <input type="button" value="Choose File"/> No file chosen</p> <p><input type="button" value="Save"/> <input type="button" value="Save & Next"/> <input type="button" value="Close"/></p> <p>Root cause: Select the root cause for the preventive action</p> <p>Short description: Generic term of the description</p> <p>Description: Description of the preventive action</p> <p>Priority: Priority of the planned corrective action</p> <p>Status: Status of the preventive action</p>

	Start date	Start date of the preventive action
	Planned end date	Planned end date of the preventive action
	Production start	Start of production (of potential new parts /versions)
	Responsible	Responsible person for the preventive action
	File	File attachment

8.5.4 Step 8 (D8): Project Completion

Before the problem-solving process is completed the 8D report are critically reviewed by the problem-solving team regarding the technical quality, completeness and comprehensibility. In addition, lessons learned is performed for the problem-solving process.

At the end, thanks to the 8D Team for the completion of the 8D report.

Instruction	View
<p>Please select the points that were created during the 8D report and enter a comment.</p>	 <p>FMEA Was an FMEA performed and implemented?</p> <p>Control plan Was a new control plan prepared?</p> <p>Instructions Were work instructions revised and trained?</p> <p>Finishing comment Text field for entering a finishing comment or other information regarding to the respective complaint for ZEISS</p>

9 Request for Concession (IQS)

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9.1 Requirement for a request for Concession

9.1.1 (Excerpt from QAA)

If the SUPPLIER is unable to supply the GOODS and SERVICES as agreed in accordance with the contract by reason of non-conformities identified prior to delivery and if the deviations cannot be rectified by special efforts and emergency measures before the agreed delivery date, in truly exceptional cases the SUPPLIER may request approval for the delivery of non-conforming GOODS and SERVICES by means of an application for special release. Nevertheless, the urgency of the supply situation must always be first clarified with the person at ZEISS who placed the order and efforts made to rectify the deviations by reconditioning or supplementary work.

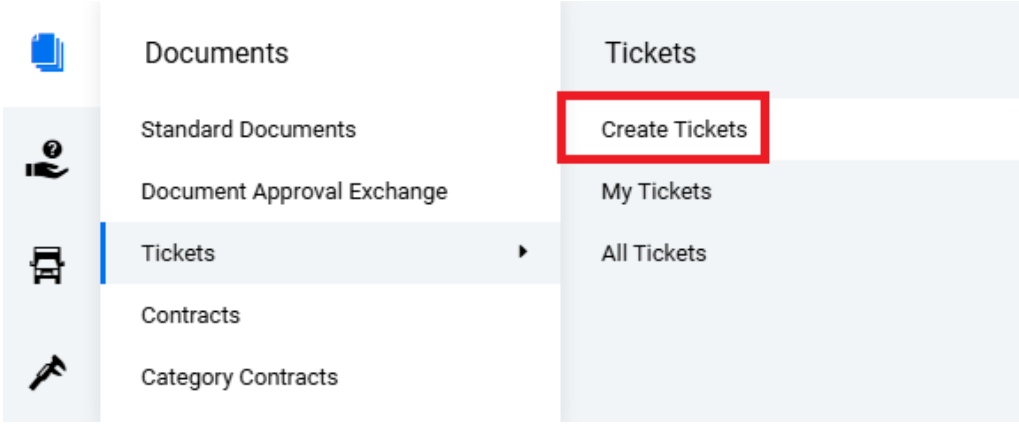

The causes of the deviations which were identified must be analyzed immediately and suitable corrective action taken which will permanently prevent the recurrence of the deviations. The application for special release must be made in writing using the ZEISS form and sent to the person at ZEISS who placed the order. The application must always contain a detailed description of the deviation, the cause which was identified, the corrective actions taken and the planned time of implementation. The Quality Management, Technical Development and other areas of ZEISS will assess the application for special release with regard to the potential effects and risks of the deviation. At the conclusion of the assessment ZEISS will inform the SUPPLIER about the decision taken with regard to special approval. The following decisions are possible:

1. Acceptance of the delivery with special approval subject to subsequent rectification or an extension of the warranty obligation
2. Acceptance of the delivery with special approval but with a reduction in the purchase price
3. Refusal of the defective delivery and refusal of the special release

A combination of 1 and 2 of the above decisions is also possible. All deliveries based on a special release must be clearly and unambiguously marked. A copy of the special release signed by ZEISS must be attached to the GOODS and SERVICES when they are delivered.

Any declaration by ZEISS to waive the assertion of warranty claims regarding the defective GOODS and SERVICES as part of the special release does not constitute a waiver of the assertion of warranty claims based on other defects in the GOODS and SERVICES


9.1.2 Create Ticket

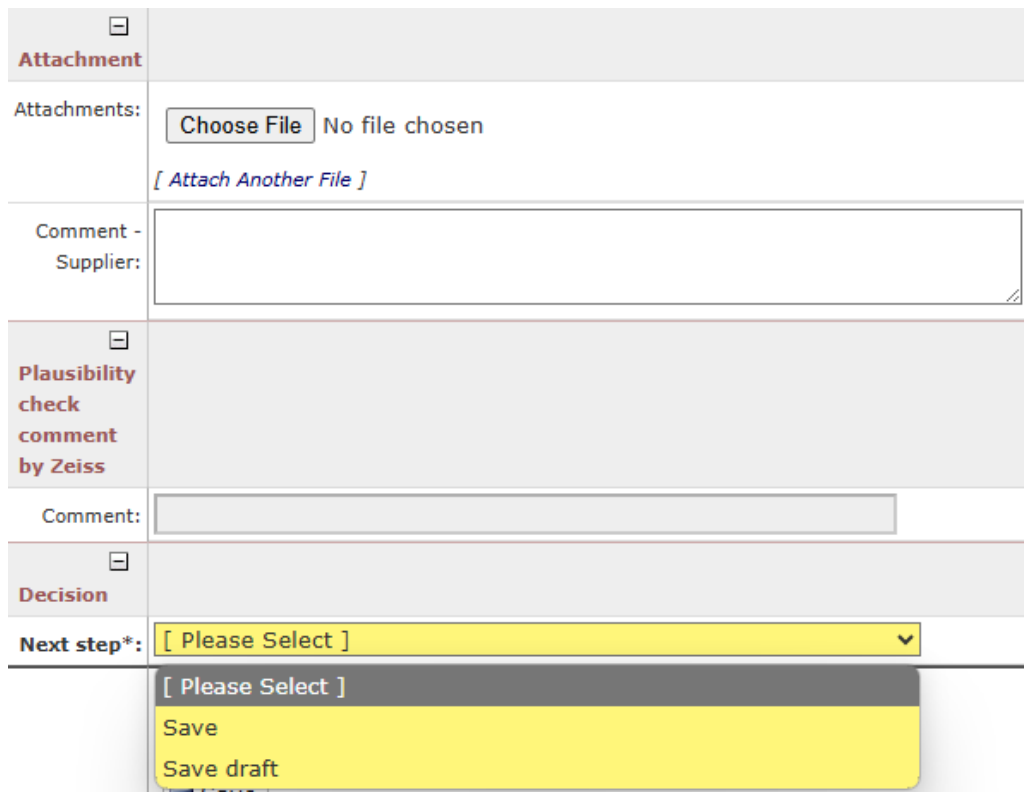
Instruction	View
<p>To create a request for concession, follow the path.</p> <ol style="list-style-type: none"> 1. Documents 2. Tickets 3. Create New 	
<p>In the drop-down, select "IQS - Special Release / Request for Concession".</p>	

9.1.3 Completing the Request for Concession

The application should be completed in full to ensure a professional and fast processing by the ZEISS quality employee.

It is **very important** that the correct **plant** is selected so that the application is forwarded to the correct supplier responsible.

Instruction	View												
<p>Bold criteria with * are mandatory. Files can be uploaded as attachments.</p>	<div data-bbox="486 309 1500 952"> <p>Supplier</p> <p>Plant*: CZ IMT GmbH Werk Oberkochen (1014)</p> <p>Company & Supplier*: Test Schneider Api Test</p> <p>Contact details:</p> <p>Article-/Material number supplier:</p> <p>Material</p> <p>ZEISS Material number*: 0123-0001-123</p> <p>ZEISS Material short text*: Test Material</p> <p>Revision:</p> <p>Version*:</p> <p>Serial number: <input type="text"/> [+++]</p> <p>Delivery / use in assembly:</p> <p>Quantity*: 1</p> <p>Document content</p> <p>Order number:</p> <table border="1"> <thead> <tr> <th>Characteristic</th> <th>Drawing position or feature description</th> <th>Target condition - Characteristic*</th> <th>Current condition - Characteristic*</th> <th>Tolerance*</th> <th>Measuring equipment</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>1</td> <td>1</td> <td>1</td> <td></td> </tr> </tbody> </table> <p>[+++]</p> </div> <div data-bbox="486 974 1500 1836"> <p>The deviation affects the material conformity (RoHS, REACH)*: [Please Select]</p> <p>[Please Select]</p> <p>Yes</p> <p>No</p> <p>Affected process:</p> <p>Additional notes to the non-conformance:</p> <p>Reason for concession:</p> <p>Fault cause:</p> <p>Corrective, preventive actions:</p> <p>Due Date: <input type="text"/> </p> </div>	Characteristic	Drawing position or feature description	Target condition - Characteristic*	Current condition - Characteristic*	Tolerance*	Measuring equipment			1	1	1	
Characteristic	Drawing position or feature description	Target condition - Characteristic*	Current condition - Characteristic*	Tolerance*	Measuring equipment								
		1	1	1									

Instruction	View
<p>Save: The request is saved and will be directly forwarded to the ZEISS supplier responsible (default group) at the corresponding plant. The ZEISS employee will be notified via e-mail.</p> <p>Save draft: The application is only cached in JAGGAER but not forwarded to the appropriate ZEISS quality employee. This option can be used if the application could not be completed in full and is subsequently completed and sent (with "Save"!).</p>	 <p>The screenshot shows a web form with three main sections:</p> <ul style="list-style-type: none"> Attachment: Includes a 'Choose File' button, 'No file chosen' text, and a link '[Attach Another File]'. Comment - Supplier: A text input field. Plausibility check comment by Zeiss: Includes a 'Comment:' label and an empty text input field. Decision: A dropdown menu for 'Next step*' with options '[Please Select]', 'Save', and 'Save draft'.

Clicking "Save" will successfully submit the request. If no submission is made, an error message appears that all mandatory fields must be filled in.

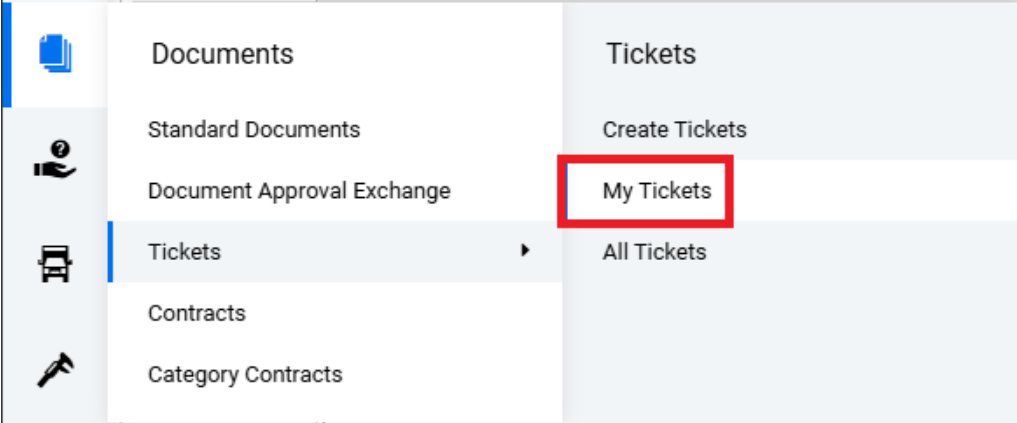
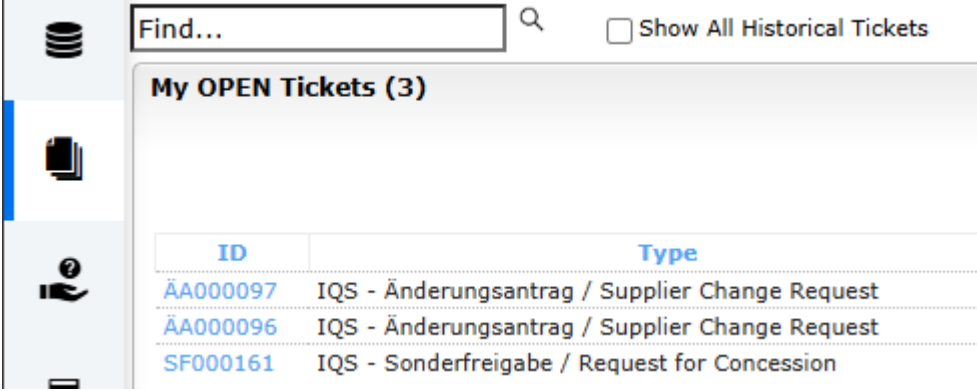
The next step is to forward the created ticket to the default group from the selected factory. The ZEISS internal quality employee must check the application for possible errors, discrepancies, etc. (plausibility check).

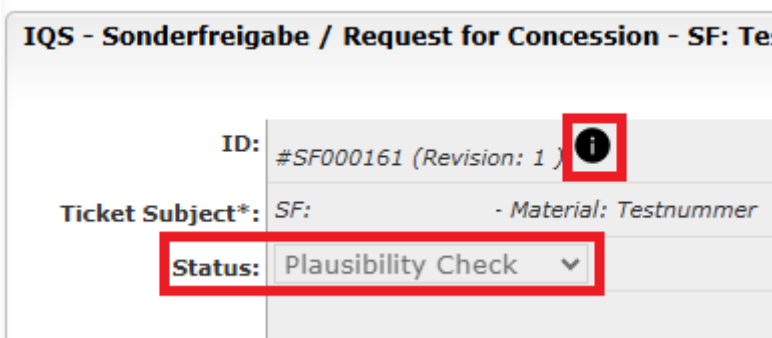
If the application does not pass the plausibility check, the supplier must revise the application and resend the corrected version.

9.1.4 Status check of Tickets in JAGGAER

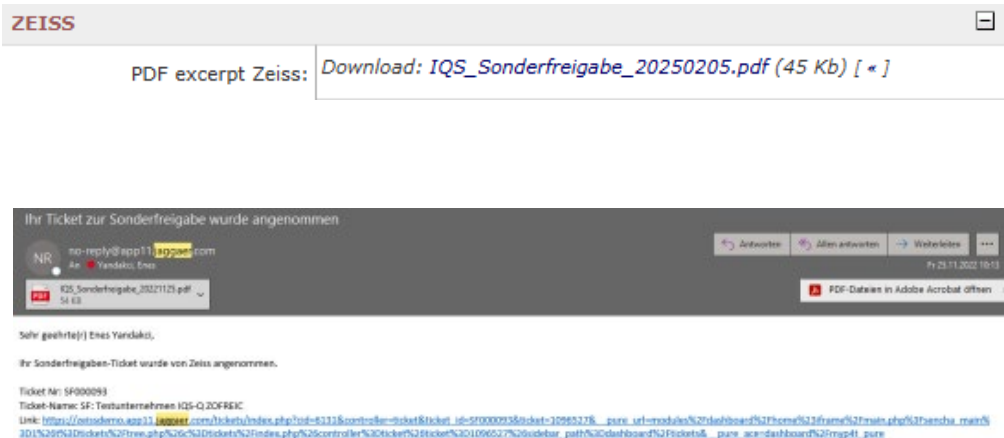
If the request passes the plausibility check, the ticket is routed internally at ZEISS until a decision is made.

You will be notified by e-mail of the decision or the closure of the ticket and can also see the status of all open and closed tickets in the portal.

Instruction	View								
<p>To view your request for Concession tickets, click</p> <ol style="list-style-type: none"> 1. Documents 2. Tickets 3. My Tickets <p>You will receive an overview of all open and closed special release tickets.</p> <p>If you would like to see the requests that have already been completed, click "Show all historical tickets".</p> <p>The search box allows you to search for content on the page.</p> <p>See topic for the ticket header. This is composed of the type of application, the supplier's name and the material number.</p>	 <p>The screenshot shows a navigation menu with the following items: Documents, Standard Documents, Document Approval Exchange, Tickets (highlighted), Contracts, and Category Contracts. A sub-menu for 'Tickets' is open, showing 'Create Tickets', 'My Tickets' (highlighted with a red box), and 'All Tickets'.</p>  <p>The screenshot shows the 'My OPEN Tickets (3)' view. At the top, there is a search box labeled 'Find...' and a checkbox for 'Show All Historical Tickets'. Below this is a table with the following data:</p> <table border="1"> <thead> <tr> <th>ID</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>AA000097</td> <td>IQS - Änderungsantrag / Supplier Change Request</td> </tr> <tr> <td>AA000096</td> <td>IQS - Änderungsantrag / Supplier Change Request</td> </tr> <tr> <td>SF000161</td> <td>IQS - Sonderfreigabe / Request for Concession</td> </tr> </tbody> </table>	ID	Type	AA000097	IQS - Änderungsantrag / Supplier Change Request	AA000096	IQS - Änderungsantrag / Supplier Change Request	SF000161	IQS - Sonderfreigabe / Request for Concession
ID	Type								
AA000097	IQS - Änderungsantrag / Supplier Change Request								
AA000096	IQS - Änderungsantrag / Supplier Change Request								
SF000161	IQS - Sonderfreigabe / Request for Concession								

Instruction	View
<p>After clicking on the ticket ID, the status of open tickets can be viewed.</p> <p>The information icon can be used to display the editing steps.</p>	

9.1.5 Notification & PDF

Instruction	View
<p>Upon completion of the ticket, an e-mail notification is sent, which includes a generated PDF file that includes all relevant information of the request. This PDF can also be opened in the Ticket View.</p> <p>Possible decisions can be: Release, Conditional approval, Rejection.</p>	

The generated PDF file looks like this:

Lieferanten-Antrag auf Sonderfreigabe Supplier Request for Concession



JAGGAER Ticket ID: SAP document no.:	SF000890 Test	Antrag gestellt am: Application submitted on:	2024-11-12 12:34
--	------------------	---	------------------

Angaben des Antragstellers:
Information of the applicant:

Firmenname: Company name:	Test Lieferant	Lieferantennummer: Company number:	123456
Ansprechpartner: Contact person:	Test User	E-Mail & Telefon: Email & Phone:	Max.mustermann@zeiss .com
Materialkurztext: Material description:	Testmaterial	ZEISS Materialnummer: ZEISS Material number:	789645-3456-234
Bestellnummer: Order no.:		Revision: Revision:	
		Version: Version:	9
Stückzahl: Quantity:	1	REACH & RoHS: REACH & RoHS:	No
Serialnummer: Serial number:	2127	Baugruppe: Component:	
Merkmal: Characteristic:	SOLL-Zustand: Estimated condition:	IST-Zustand: Current condition:	Toleranz: Tolerance:
Merkmal 1	96,01	96,0061	+ -0,003
Betroffener Prozess: Affected process:			
Erläuterung zur Abweichung: Additional notes to the non-conformance:			
Begründung: Reason for concession:			
Fehlerursache: Fault cause:			
Korrektur- & Vorbeugungsmaßnahmen: Corrective & preventive actions:	keine	Umsetzungstermin: Due date:	2024-11-12
Angehängte Dokumente URL: Attached documents URL:	https://app11.jaggaer.com/main.php?t=tickets%2Ftree.php&c=tickets%2Findex.php&controller=ticket&ticket=5068655		

Angaben ZEISS:
Information by ZEISS:

Entscheidung: Decision:	Release	Entscheidungsträger Zeiss: Decision maker Zeiss:	Test
Dokumentation der Entscheidung: Documentation of decision:	Test		

10 Supplier Change Request (IQS)

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10.1 Requirements for a Change Request

10.1.1 (Excerpt from QAA)

If the SUPPLIER is unable to supply the GOODS and SERVICES as agreed in accordance with the contract by reason of non-conformities identified prior to delivery and if the deviations cannot be rectified by special efforts and emergency measures before the agreed delivery date, in truly exceptional cases the SUPPLIER may request approval for the delivery of non-conforming GOODS and SERVICES by means of an application for special release. Nevertheless, the urgency of the supply situation must always be first clarified with the person at ZEISS who placed the order and efforts made to rectify the deviations by reconditioning or supplementary work.

The causes of the deviations which were identified must be analyzed immediately and suitable corrective action taken which will permanently prevent the recurrence of the deviations. The application for special release must be made in writing using the ZEISS form and sent to the person at ZEISS who placed the order.

The application must always contain a detailed description of the deviation, the cause which was identified, the corrective actions taken and the planned time of implementation. The Quality Management, Technical Development and other areas of ZEISS will assess the application for special release with regard to the potential effects and risks of the deviation. At the conclusion of the assessment ZEISS will inform the SUPPLIER about the decision taken with regard to special approval. The following decisions are possible:

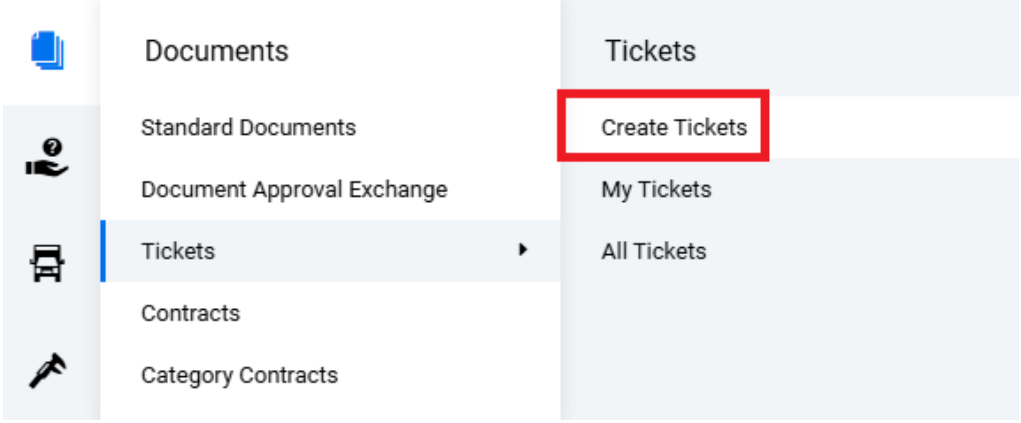
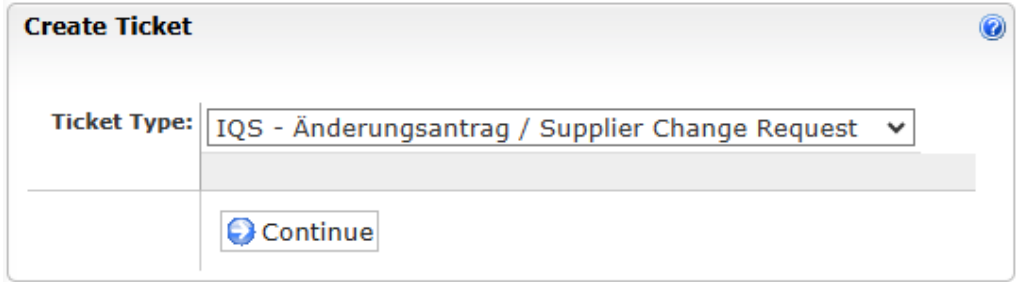
1. Acceptance of the delivery with special approval subject to subsequent rectification or an extension of the warranty obligation
2. Acceptance of the delivery with special approval but with a reduction in the purchase price
3. Refusal of the defective delivery and refusal of the special release

A combination of 1 and 2 of the above decisions is also possible.

All deliveries based on a special release must be clearly and unambiguously marked. A copy of the special release signed by ZEISS must be attached to the GOODS and SERVICES when they are delivered.

Any declaration by ZEISS to waive the assertion of warranty claims regarding the defective GOODS and SERVICES as part of the special release does not constitute a waiver of the assertion of warranty claims based on other defects in the GOODS and SERVICES.

10.1.2 Create Ticket

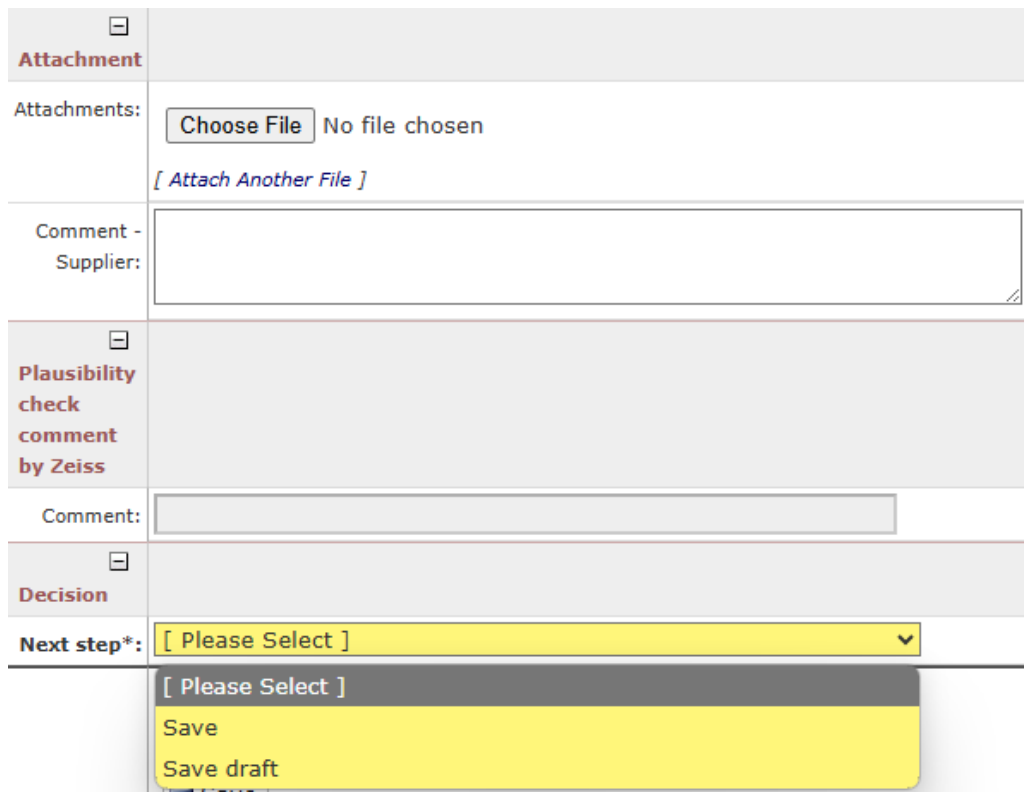
Instruction	View
<p>To create a request for concession, follow the path.</p> <ol style="list-style-type: none"> 1. Documents 2. Tickets 3. Create New 	
<p>In the drop-down, select "IQS - Änderungsantrag/ Supplier Change Request".</p>	

10.1.3 Completing the Request for Concession

The application should be completed in full to ensure a professional and fast processing by the ZEISS quality employee.

It is **very important** that the correct **plant** is selected so that the application is forwarded to the correct supplier responsible.

Instruction	View																		
<p>Bold criteria with * are mandatory. Files can be uploaded as attachments.</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>IQS - Änderungsantrag / Supplier Change Request -</p> <hr/> <div style="background-color: #f0f0f0; padding: 2px;">Supplier</div> <p>Plant*: Carl Zeiss IMT Suzhou (6617) <input type="text"/></p> <p>Company & Supplier*: Test Schneider <input type="text"/> Api Test <input type="text"/></p> <p>Contact details: <input type="text"/></p> <hr/> <p>Article-/Material number supplier: <input type="text"/></p> <div style="background-color: #f0f0f0; padding: 2px;">Change</div> <p>Supplier change number: <input type="text"/></p> <p>Change description*: <input style="width: 100%; height: 40px;" type="text"/></p> <p>Change criteria*: <input type="text" value="[Please Select]"/></p> <p>Development costs: <input type="text" value="Changes to the specification and other procurement documents"/></p> <p>Manufacturing costs per unit: <input type="text" value="All changes to the construction status (including the use of alternative components for discontinued components)"/></p> <p>Will the requested change result in an extension of the delivery time?*: <input type="text" value="Changes affecting the function and performance of the scope of delivery"/></p> <p>Implementation: <input type="text" value="Changes that affect the service life or usability"/></p> <p>Testing planned?*: <input type="text" value="Changes or relocation of production facilities"/></p> <p>Affection on registration*: <input type="text" value="Change of subcontractors"/></p> <p>Supplier change committee 1: <input type="text" value="Die Verlagerung der Produktion kompletter Einheiten an Unterlieferanten (Dritte)"/></p> <p>Supplier change committee 2: <input type="text" value="Any changes to software and/or firmware (product related)"/></p> <div style="background-color: #f0f0f0; padding: 2px;">Material</div> <p>ZEISS Material number*: <input type="text" value="Changes to any interfaces (electrical, mechanical or functional)"/></p> <p>ZEISS Material short text*: <input type="text"/></p> <p>Revision: <input type="text"/></p> <p>Version*: <input type="text"/></p> <p>Assembly / Module / Component: <input type="text"/></p> <div style="background-color: #f0f0f0; padding: 2px;">Document content</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Characteristic:</th> <th style="width: 15%;">Drawing position or feature description</th> <th style="width: 15%;">Target condition - Characteristic*</th> <th style="width: 15%;">Current condition - Characteristic*</th> <th style="width: 10%;">Tolerance*</th> <th style="width: 15%;">Measuring equipment</th> </tr> </thead> <tbody> <tr> <td></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td colspan="6" style="text-align: left;">[+++]</td> </tr> </tbody> </table> <p>The deviation affects the material conformity (RoHS, REACH)*: <input type="text" value="[Please Select]"/></p> </div>	Characteristic:	Drawing position or feature description	Target condition - Characteristic*	Current condition - Characteristic*	Tolerance*	Measuring equipment		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	[+++]					
Characteristic:	Drawing position or feature description	Target condition - Characteristic*	Current condition - Characteristic*	Tolerance*	Measuring equipment														
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>														
[+++]																			

Instruction	View
<p>Save: The request is saved and will be directly forwarded to the ZEISS supplier responsible (default group) at the corresponding plant. The ZEISS employee will be notified via e-mail.</p> <p>Save draft: The application is only cached in JAGGAER but not forwarded to the appropriate ZEISS quality employee. This option can be used if the application could not be completed in full and is subsequently completed and sent (with "Save"!).</p>	 <p>The screenshot shows a form with several sections:</p> <ul style="list-style-type: none"> Attachment: Includes a 'Choose File' button and the text 'No file chosen'. A link '[Attach Another File]' is also present. Comment - Supplier: A text input field. Plausibility check comment by Zeiss: A text input field. Decision: A dropdown menu with the text '[Please Select]'. The dropdown is open, showing two options: 'Save' and 'Save draft'.

Clicking "Save" will successfully submit the request. If no submission is made, an error message appears that all mandatory fields must be filled in.

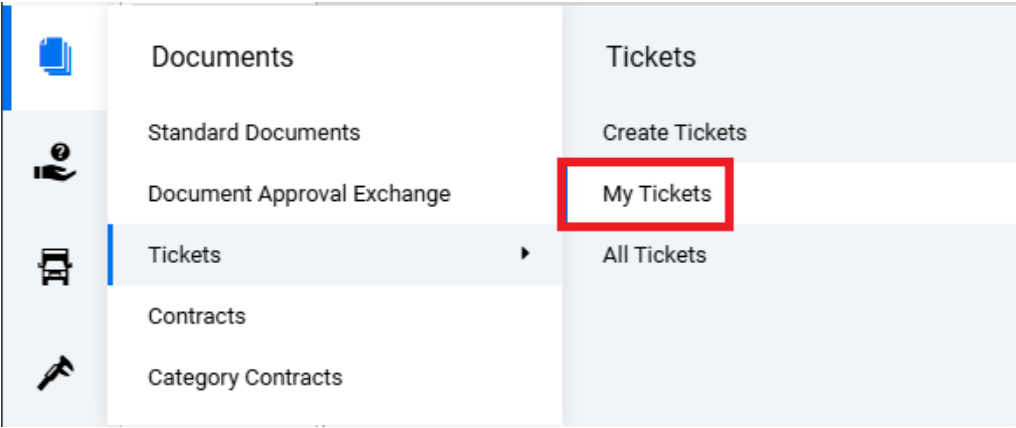
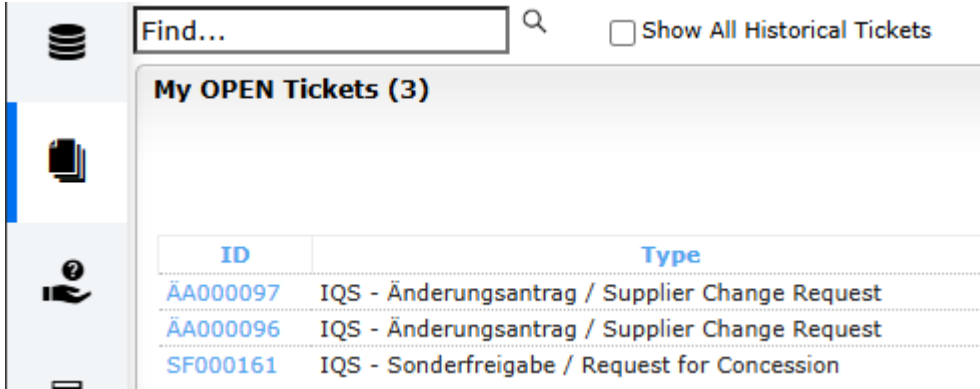
The next step is to forward the created ticket to the default group from the selected factory. The ZEISS internal quality employee must check the application for possible errors, discrepancies, etc. (plausibility check).

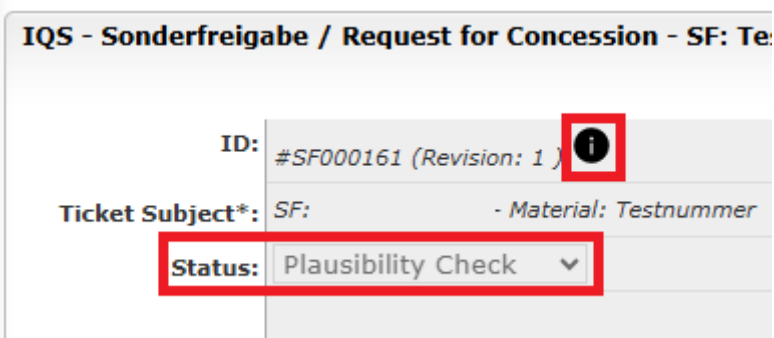
If the application does not pass the plausibility check, the supplier must revise the application and resend the corrected version.

10.1.4 Status check of Tickets in JAGGAER


If the request passes the plausibility check, the ticket is routed internally at ZEISS until a decision is made.

You will be notified by e-mail of the decision or the closure of the ticket and can also see the status of all open and closed tickets in the portal.

Instruction	View								
<p>To view your change requests, click</p> <ol style="list-style-type: none"> 4. Documents 5. Tickets 6. My Tickets <p>You will receive an overview of all open and closed special release tickets.</p> <p>If you would like to see the requests that have already been completed, click "Show all historical tickets".</p> <p>The search box allows you to search for content on the page.</p> <p>See topic for the ticket header. This is composed of the type of application, the supplier's name and the material number.</p>	 <p>The screenshot shows a navigation menu with the following items: Documents, Standard Documents, Document Approval Exchange, Tickets (highlighted), Contracts, and Category Contracts. A sub-menu for 'Tickets' is open, showing 'Create Tickets', 'My Tickets' (highlighted with a red box), and 'All Tickets'.</p>  <p>The screenshot shows the 'My OPEN Tickets (3)' view. It includes a search box labeled 'Find...', a 'Show All Historical Tickets' checkbox, and a table of tickets.</p> <table border="1" data-bbox="655 1323 1485 1473"> <thead> <tr> <th>ID</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>AA000097</td> <td>IQS - Änderungsantrag / Supplier Change Request</td> </tr> <tr> <td>AA000096</td> <td>IQS - Änderungsantrag / Supplier Change Request</td> </tr> <tr> <td>SF000161</td> <td>IQS - Sonderfreigabe / Request for Concession</td> </tr> </tbody> </table>	ID	Type	AA000097	IQS - Änderungsantrag / Supplier Change Request	AA000096	IQS - Änderungsantrag / Supplier Change Request	SF000161	IQS - Sonderfreigabe / Request for Concession
ID	Type								
AA000097	IQS - Änderungsantrag / Supplier Change Request								
AA000096	IQS - Änderungsantrag / Supplier Change Request								
SF000161	IQS - Sonderfreigabe / Request for Concession								

Instruction	View
<p>After clicking on the ticket ID, the status of open tickets can be viewed.</p> <p>The information icon can be used to display the editing steps.</p>	

10.1.5 Notification & PDF

Instruction	View
<p>Upon completion of the ticket, an e-mail notification is sent, which includes a generated PDF file that includes all relevant information of the request. This PDF can also be opened in the Ticket View.</p> <p>Possible decisions can be: Release, Conditional approval, Rejection.</p>	

The generated PDF file looks like this:

Änderungsantrag - Lieferant an ZEISS Supplier change request (SCR) - Supplier to ZEISS



JAGGAER Ticket ID:		Antrag gestellt am: Application submitted on:	
SAP Dokumentenr.: SAP document no.:		Änderungsantrags-Nr. ZEISS (ECM 1 Konstruktionsmappen-Nr.): Change request no. ZEISS (ECM 1 construction folder number):	

Angaben des Antragstellers:
Information of the applicant:

Lieferanten-Änderungs-Nr: Supplier change request no.:			
Firmenname: Company name:		Lieferantennummer: Company number:	
Ansprechpartner: Contact person:		E-Mail & Telefon: Email & Phone:	
Materialkurztext: Material description:		ZEISS Materialnummer: ZEISS Material number:	
Lieferanten-Artikelnummer: Supplier article number:		Revision: Revision:	
		Version: Version:	
REACH & RoHS: REACH & RoHS:			
Abschätzung Kostenauswirkung: Estimation of cost effects:	Entwicklungskosten: R&D costs:		
	Hestellkosten pro Einheit: Manufacturing cost per unit:		
Realisierungszeit ab Änderungsfreigabe bis Änderungsmitteilung: Implementation time from approval until change notification:			
Änderungsbeschreibung: Change description:			
Erprobung vorgesehen: Testing required:		Auswirkung auf Zulassung: Effect on product safety:	
Merkmal: Characteristic:	SOLL-Zustand: Estimated condition:	IST-Zustand: Current condition:	Toleranz: Tolerance:
Änderungsgremium 1: Change committee 1:		Änderungsgremium 2: Change committee 2:	
Angehängte Dokumente: Attached documents:	https://app11.jaggaer.com/main.php?t=tickets%2Ftree.php&c=tickets%2Findex.php&controller=ticket&ticket=4823980		

Angaben ZEISS:
Information by ZEISS:

Entscheidung: Decision:		Entscheidungsträger Zeiss: Decision maker Zeiss:	
Dokumentation der Entscheidung: Documentation of decision:			

11 First Article Inspection Report (SPU)

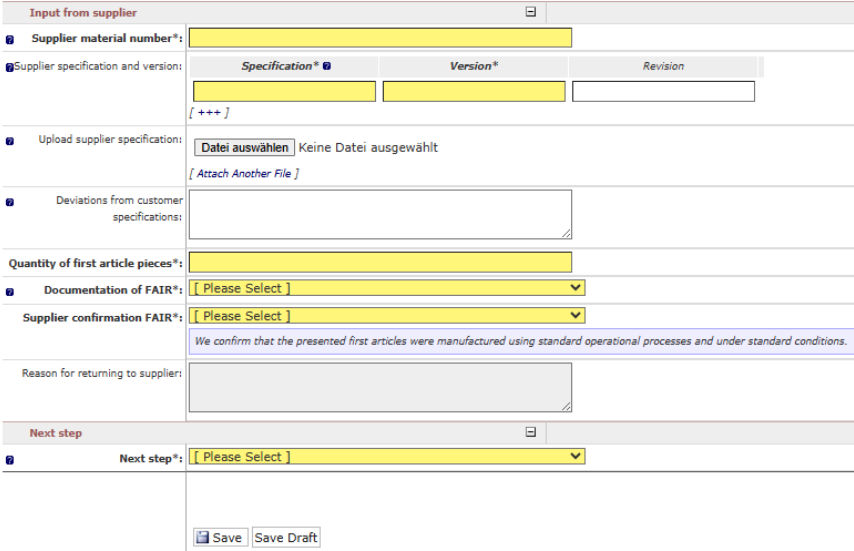
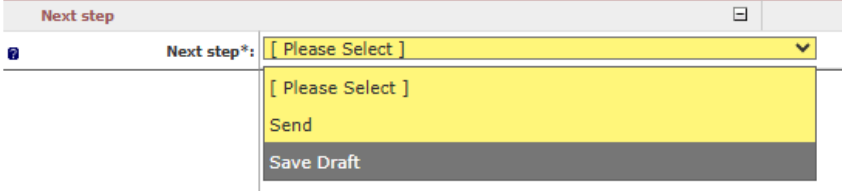
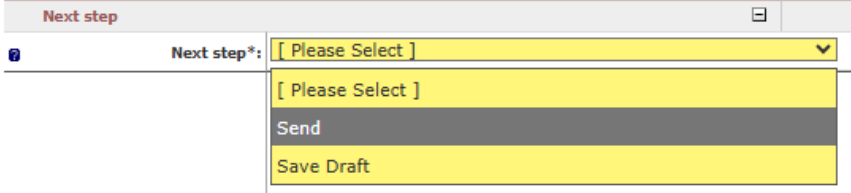
The agreements between the two parties made in the QSV apply.

11.1	Incoming ticket.....	112
11.2	Ticket processing	112
11.3	Status of First Article Inspection Reports	113
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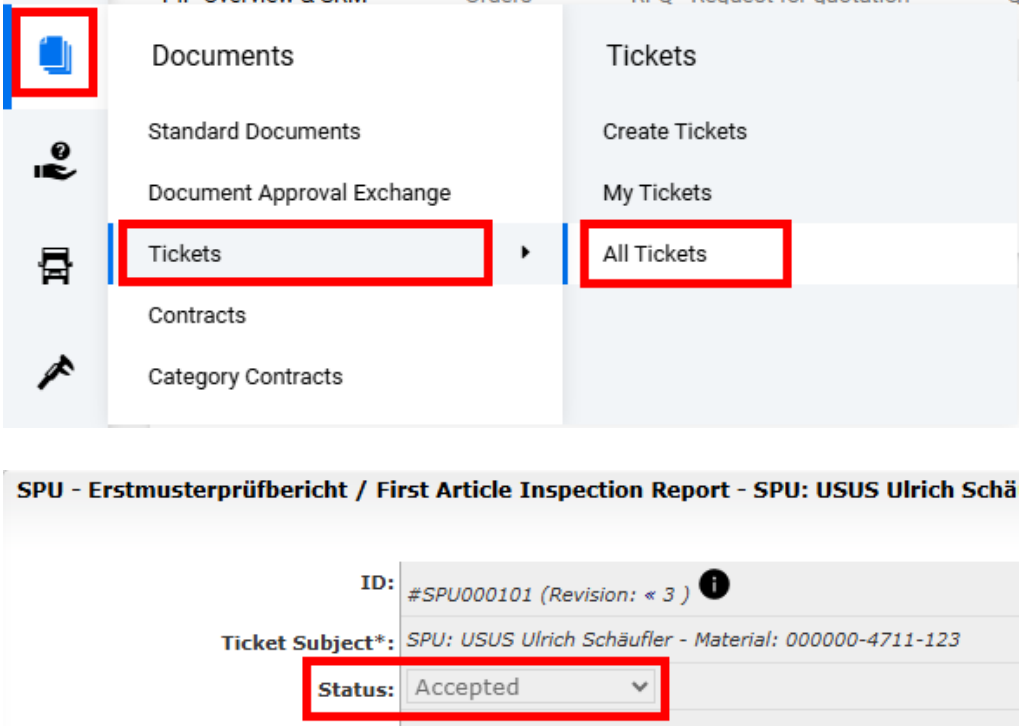
11.1 Incoming ticket

After the ticket has been created by the customer, an e-mail notification is sent to the supplier, which contains a link to the respective ticket. The link takes you directly to the ticket to be processed.

11.2 Ticket processing

Instruction	View
<p>Open the ticket either via the link in the e-mail or via the JAGGAER navigation (Tickets → my tickets / all tickets) and edit all mandatory fields in the supplier's details area. These are marked with a * and printed in bold.</p>	
<p>The ticket can be cached and reopened for further processing at another time.</p>	
<p>Once all the necessary information has been provided, the ticket can be returned to the customer by selecting "Send" and Save. This transmits all data.</p>	

11.3 Status of First Article Inspection Reports

Instruction	View
<p>The status of all tickets can be viewed via "All Tickets" or is displayed directly in the ticket header.</p> <p>The following statuses are possible:</p> <ul style="list-style-type: none"> ▪ Check by Supplier ▪ Check by ZEISS ▪ Accepted ▪ Rejected 	 <p>The screenshot shows a navigation menu on the left with 'Tickets' highlighted. On the right, a sidebar shows 'All Tickets' selected. Below, a ticket header for 'SPU - Erstmusterprüfbericht / First Article Inspection Report - SPU: USUS Ulrich Schä' is shown. The 'Status' dropdown is set to 'Accepted'.</p>

11.4 Confirmation of First Article Inspection Report

When your ticket is sent to the customer, a date stamp with your name is generated, which is considered a signature in the system.

11.5 Notification

You will be informed by e-mail about the receipt and completion of a ticket. It contains a link and the initial sample completion documents.

12 Deviation Request (SMT)

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12.1 Introduction

This chapter describes the deviation request process on supplier side. The platform used and the data only reflect test data.

Each supplier connected to the ZEISS Supplier Portal PIP has one or more portal administrators. The user data and login information are provided by the administrator of the supplier. Each user has an assigned role with corresponding user rights. Administrators have extended user rights.

12.2 Workflow

The deviation request process starts in the ZEISS Supplier Portal PIP, where the supplier creates a deviation request. The simplified workflow for deviation requests in ZEISS Supplier Portal PIP is as follows:

Request creation:

The supplier submits a deviation request via ZEISS Supplier Portal PIP and a notification is sent to the related purchaser at ZEISS.

Processing:

The related department at ZEISS checks and evaluates the information of the request and decides about approval or refusal of the deviations. The request ticket is saved in ZEISS Supplier Portal PIP with the decision and associated comments.

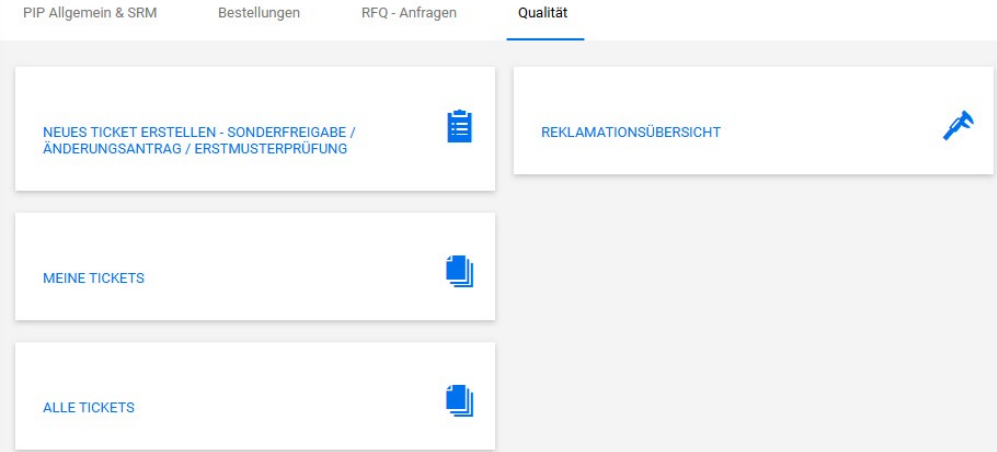
It is also possible for the ZEISS processor to return the application to the supplier to make corrections or additions.

Closure:

At the end of the process the request will be closed in the ZEISS Supplier Portal PIP. A closure document will be sent to the supplier, and the related ZEISS department will be informed about the decision. With this last step, the application with the associated attachments is archived in the ZEISS database.

12.3 Navigation

The navigation area contains the Supplier Request for Concession section with the following items:

Instruction	View
<p>Create Supplier Request for Concession: The supplier can create a new deviation request by selecting this item. In the following drop-down menu „Sonderfreigabeantrag/ Deviation Request“ must be selected. By clicking the „Continue“ button the ticket window will be opened. Please see Chapter “Create Deviation Request”.</p> <p>My Supplier Request for Concession: Under this section all submitted or saved requests are listed.</p> <p>All Supplier Request for Concession: All submitted requests of the supplier are listed here.</p> <p>The application status can be either "In progress" (the application has been saved and sent to ZEISS) or "Draft" (the application was saved but not yet sent to ZEISS).</p>	

There is also the option to search for requests by using the "Search" button. The supplier can open a deviation request ticket in the list by clicking on the ID or the subject. The ticket window will open, and the ticket can be viewed, edited or printed using the "Print" button.

12.4 Ticket Window

12.4.1 Entry screen

Instruction	View
Clicking on Create Ticket opens the ticket window to enter the deviation request.	

The ticket window is divided into 4 sections:

Information about Material & Order

Information about material and order. The information must refer to a ZEISS order (eg. Module/Set/Assembly/Component).

Information about affected material

All necessary information for the evaluation of the deviation by the responsible ZEISS specialist department.

Actions

Description of the measures planned and implemented to contain the problem, eliminate the root cause and prevent similar problems.

Activities

Saving or sending the deviation request to ZEISS.


The following rules apply to the fields to be filled in:

- **Mandatory fields** must be filled in and are marked with a bold designation and an asterisk. Without correctly filling mandatory fields, an application cannot be sent to ZEISS.
- Some fields are only displayed if certain **options** have been selected beforehand.
- For some fields a **help text** highlighted in blue explains the format requirements.
- Some fields have a **question mark** next to the heading, which displays a help text on the format specification for this field when the mouse pointer is moved over it.

- Clicking the icon next to **date** entry fields opens a calendar window to select a date.
- Some fields have drop-down lists for selecting certain options. These drop-down lists may vary depending on the selection in other drop-downs.
- Additional input fields can be added by clicking on the [+++] icon.
- With a click on the [x] symbol input fields can be removed.

12.5 Information about Material & Order

In the section **“Information about Material & Order”** the supplier must enter the required information about the related ZEISS order and the material.

Instruction	View
<p>Order Number: Order number of the material according to the ZEISS order. If no order number is available, you may enter text.</p> <p>Order Position: Order position of the material according to the ZEISS order.</p> <p>Purchaser: ZEISS contact person selectable from drop-down list according to the order. The ZEISS purchaser can add representatives during his or her absence. In this case, the ZEISS Supplier Portal automatically displays the representative.</p> <p>Delivery date: If not known, please indicate planned delivery date.</p>	<div data-bbox="555 898 1401 1720"> <p>SMT – Sonderfreigabe / Deviation Request -</p> <p>Angaben zu <input type="checkbox"/> Material & Bestellung</p> <p>Bestellnummer*: <input type="text" value="123456789"/></p> <p>Bestellposition*: <input type="text" value="010"/></p> <p>Besteller*: <input type="text" value="Ulm Nadine"/></p> <p>Lieferdatum*: <input type="text" value="2025-11-19"/> </p> <p>Material-Nr. SMT*: <input type="text" value="000000-1234-123"/> <i>Format: 000000-1234-123</i></p> <p>Zeichnungsversion*: <input type="text" value="01"/></p> <p>Material-Bezeichnung SMT: <input type="text" value="Beispiel Bauteil"/></p> <p>Bauteil serialisiert? *: <input type="text" value="Ja"/></p> <p>Bestellte Stückzahl*: <input type="text" value="5,00"/></p> <p>Betroffene Stückzahl*: <input type="text" value="1,00"/> <i>Die betroffene Stückzahl darf nicht größer als die bestellte Stückzahl sein!</i></p> <p>Abweichung an Subkomponente?*: <input type="text" value="Nein"/></p> </div>

Material-No. SMT: ZEISS material number in format 000000-1234-123 related to the order number and position.

Drawing version:
Related drawing version.

Material description
SMT: Description of the material.

Component serialized?:
Yes or No selectable from drop-down list.

Ordered parts: Quantity according to order.

Affected number of parts: Number of components affected by the deviation (must not be larger than the ordered number of parts).

Deviation at subcomponent: Yes or No selectable.

12.5.1 Deviation of Subcomponent

Instruction	View																		
<p>The following fields need to be filled in only if the request is for deviations at subcomponents, i.e. if the components are parts of a higher-level assembly or module.</p>	<div data-bbox="456 416 1489 920"> <p>Angaben zur Abweichung <input type="checkbox"/></p> <p>Betroffene Vorgabedokumente:</p> <table border="1"> <thead> <tr> <th>Dokumentenart</th> <th>Dokumentennummer</th> <th>Dokumentversion</th> <th>Teildokumentennummer</th> </tr> </thead> <tbody> <tr> <td>FUN</td> <td>000000-2741-967</td> <td>01</td> <td>001</td> </tr> </tbody> </table> <p>[+++]</p> <p>Beschreibung der Abweichung: Bei der Maßkontrolle wurde eine Abweichung der Ebenheit 0,1 festgestellt. Die Abweichung beträgt maximal 01mm vom Sollwert. (Siehe beigefügtes Messprotokoll)</p> <table border="1"> <thead> <tr> <th>betroffenes Merkmal*</th> <th>Modul/Baugruppe/Einzelteil Materialnummer* </th> <th>Modul/Baugruppe/Einzelteil Seriennummer* </th> <th>Merkmal Soll*</th> <th>Merkmal Ist*</th> </tr> </thead> <tbody> <tr> <td>PM1 Ebenheit</td> <td>2741-967</td> <td>01-MFA-2143-0001</td> <td>0,1</td> <td>0,2</td> </tr> </tbody> </table> <p>[+++]</p> <p>Prüfung des Lagerbestandes beim Kunden erforderlich: Ja <input type="checkbox"/></p> <p>Materialgruppe: Mechanik/Mechanics</p> <p>Fehlerkategorie: Maßabweichung/ Funktionsfehler/Dimensional deviation/ functional error</p> <p>Fehlerart: Mechanische Abmessung a.T./Mechanical dimension out of specification</p> <p>Ergänzende Unterlagen: <input type="button" value="Datei auswählen"/> Keine Datei ausgewählt</p> <p>[Noch eine Datei hinzufügen]</p> <p>zulässige Dateiformate: TIF, JPG, PDF, PPT, PPTX, DOC, DOCX, XLS, XLSX, ZIP</p> <p>Fehlerursache: Werkzeugverschleiß</p> <p>Verursacher: Lieferant</p> </div>	Dokumentenart	Dokumentennummer	Dokumentversion	Teildokumentennummer	FUN	000000-2741-967	01	001	betroffenes Merkmal*	Modul/Baugruppe/Einzelteil Materialnummer*	Modul/Baugruppe/Einzelteil Seriennummer*	Merkmal Soll*	Merkmal Ist*	PM1 Ebenheit	2741-967	01-MFA-2143-0001	0,1	0,2
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PM1 Ebenheit	2741-967	01-MFA-2143-0001	0,1	0,2															

Deviation at subcomponent?: Yes, if the material with deviation is not listed as a separate order item in the ZEISS purchase order (e.g. subcomponent or subassembly of the material no. in the purchase order). Depending on this selection the following fields will change.

Material No. SMT: ZEISS material number of the subcomponent.

Drawing version: Drawing version of the subcomponent concerned.

Material description SMT: Description of the affected subcomponent

Component serialized?: Yes, if the subcomponent has a serial number, else no.

Ordered parts: Quantity of the ordered subcomponent (different to quantity of the module, if several subcomponents are ordered per module).

Affected number of parts: Quantity of the subcomponents affected by the deviation (must be equal or less than the ordered quantity).

Set order: Yes, if a set was ordered, else no.

12.6 Information about Deviation

Instruction	View										
<p>All information on the deviation is entered into this section. A maximum of 25 deviations can be entered, but all of them may only concern the same type of error.</p>	<p>Angaben zur Abweichung <input type="checkbox"/></p> <p>Betroffene Vorgabedokumente:</p> <table border="1"> <tr> <td>Dokumentenart</td> <td>Dokumentennummer</td> <td>Dokumentversion</td> <td>Teildokumentennummer</td> </tr> <tr> <td>FUP</td> <td>000000-2741-967</td> <td>01</td> <td>001</td> </tr> </table> <p>[+++]</p>	Dokumentenart	Dokumentennummer	Dokumentversion	Teildokumentennummer	FUP	000000-2741-967	01	001		
	Dokumentenart	Dokumentennummer	Dokumentversion	Teildokumentennummer							
	FUP	000000-2741-967	01	001							
	<p>Beschreibung der Abweichung:</p> <p>Bei der Maßkontrolle wurde eine Abweichung der Ebenheit 0,1 festgestellt. Die Abweichung beträgt maximal 01mm vom Sollwert. (Siehe beigefügtes Messprotokoll)</p>										
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	betroffenes Merkmal*	Modul/Baugruppe/Einzelteil Materialnummer*	Modul/Baugruppe/Einzelteil Serialnummer*	Merkmal Soll*	Merkmal Ist*						
	PM1 Ebenheit	2741-967	01-MFA-2143-0001	0,1	0,2						
	<p>Prüfung des Lagerbestandes beim Kunden erforderlich:</p> <p>Ja <input type="checkbox"/></p>										
	<p>Materialgruppe: <input type="text" value="Mechanik/Mechanics"/></p>										
	<p>Fehlerkategorie: <input type="text" value="Maßabweichung/ Funktionsfehler/Dimensional deviation/ functional error"/></p>										
<p>Fehlerart: <input type="text" value="Mechanische Abmessung a.T./Mechanical dimension out of specification"/></p>											
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<p>Fehlerursache: <input type="text" value="Werkzeugverschleiß"/></p>											
<p>Verursacher: <input type="text" value="Lieferant"/></p>											

Affected default documents: The ZEISS specification which is related to the deviation.

Description of the deviation: Description of the deviation as precise and detailed as possible for assessment by the responsible ZEISS department.

Affected feature: Characteristic affected by the deviation (according to valid specification).

Material number: ZEISS material number of the affected part, number format 1234-123.

Serial number: Serial number of the affected part, number format 01-ABC-2222-0001 or 12345678.

Special case pre-release: If the module serial number is not yet known at the time the request is created, a "-" can be entered in the serial number field (see example 7.5) The requestor is then informed of the decision after the request has been processed by ZEISS and can continue processing the requested subcomponents. A delivery release for the module is not issued until the serial number has been subsequently entered and the ticket has been sent back to ZEISS; only then is the deviation request complete.

Batch number: Batch number of the individual parts concerned (only for non-serialized parts).

Feature set: Set value of the deviation.

Feature actual: Actual value of the deviation.

Checking of customer inventory required: If there is a possibility that previous deliveries were also affected and parts with the same deviation could already be in ZEISS stock, please select "yes".

Material group: Select material group of the component. The options are: Service, Mechanical, Mechatronics/Electronics and Optics. The selection of the material group depends on the submitter of the request, not on the originator of the deviation (e.g. subcontractor). Important for ZEISS to select the related technical department.

Defect category: Select the category of the deviation from the list. Important for ZEISS to select the related technical department.

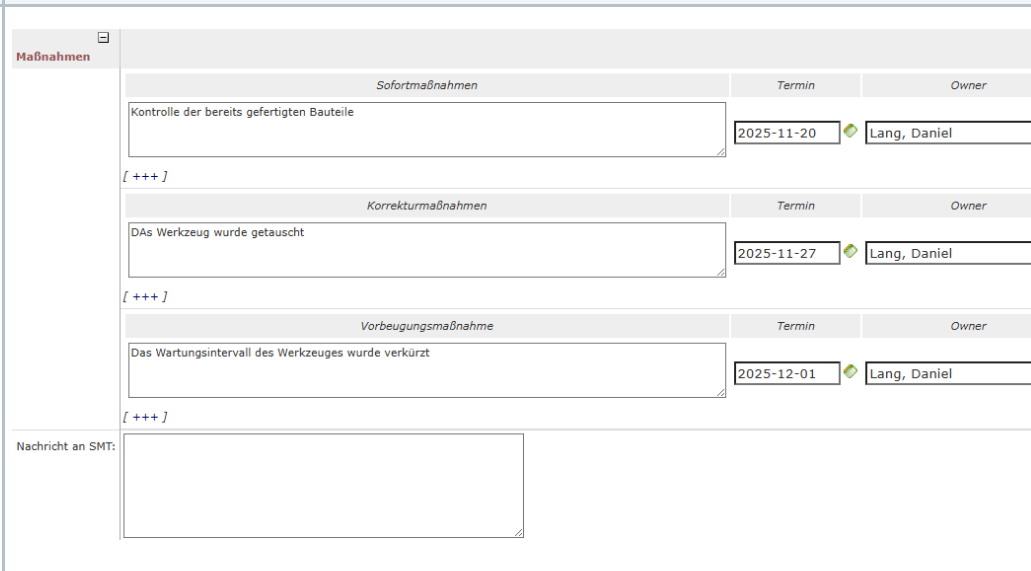
Type of defect: Select the type of the deviation from the list. Important for ZEISS to select the related technical department.

Additional documents: If supplementary documents with additional information (e.g. measurement report, images, etc.) are sent, please upload the related documents here. The formats TIF, JPG, PDF, PPT, PPTX, DOC, DOCX, XLS, XLSX, ZIP can be used. Additional attachments can be added using the "Add another file" button and an entry can be deleted by using the corresponding button. **We ask you to combine all attachments into one file.**

Root cause: As precise and detailed as possible description of the determined cause of the error.

Causer: The originator of the deviation, if different from supplier, e.g. a sub-supplier who produced the material or a service provider who caused the deviation.

12.7 Actions

Instruction	View																		
<p>In this section, the planned and implemented measures to contain the problem, to eliminate the root cause and to prevent it are entered. For multiple measures, additional input fields can be added by clicking on the [+++] symbol.</p>	 <p>Maßnahmen</p> <table border="1"> <thead> <tr> <th>Sofortmaßnahmen</th> <th>Termin</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Kontrolle der bereits gefertigten Bauteile</td> <td>2025-11-20</td> <td>Lang, Daniel</td> </tr> </tbody> </table> <p>[+++]</p> <table border="1"> <thead> <tr> <th>Korrekturmaßnahmen</th> <th>Termin</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Das Werkzeug wurde getauscht</td> <td>2025-11-27</td> <td>Lang, Daniel</td> </tr> </tbody> </table> <p>[+++]</p> <table border="1"> <thead> <tr> <th>Vorbeugungsmaßnahme</th> <th>Termin</th> <th>Owner</th> </tr> </thead> <tbody> <tr> <td>Das Wartungsintervall des Werkzeuges wurde verkürzt</td> <td>2025-12-01</td> <td>Lang, Daniel</td> </tr> </tbody> </table> <p>[+++]</p> <p>Nachricht an SMT:</p>	Sofortmaßnahmen	Termin	Owner	Kontrolle der bereits gefertigten Bauteile	2025-11-20	Lang, Daniel	Korrekturmaßnahmen	Termin	Owner	Das Werkzeug wurde getauscht	2025-11-27	Lang, Daniel	Vorbeugungsmaßnahme	Termin	Owner	Das Wartungsintervall des Werkzeuges wurde verkürzt	2025-12-01	Lang, Daniel
Sofortmaßnahmen	Termin	Owner																	
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Korrekturmaßnahmen	Termin	Owner																	
Das Werkzeug wurde getauscht	2025-11-27	Lang, Daniel																	
Vorbeugungsmaßnahme	Termin	Owner																	
Das Wartungsintervall des Werkzeuges wurde verkürzt	2025-12-01	Lang, Daniel																	

Interim containment actions: Short-term emergency measures that contain the problem until permanent corrective measures are effectively implemented.

Permanent corrective actions: Corrective actions to permanently eliminate the identified root cause.

Preventive actions: Measures to avoid the occurrence of the same or similar problems in other products or sites. Use of the knowledge gained (lessons learned).

Date: Since when are the measures be implemented or when will they be implemented.

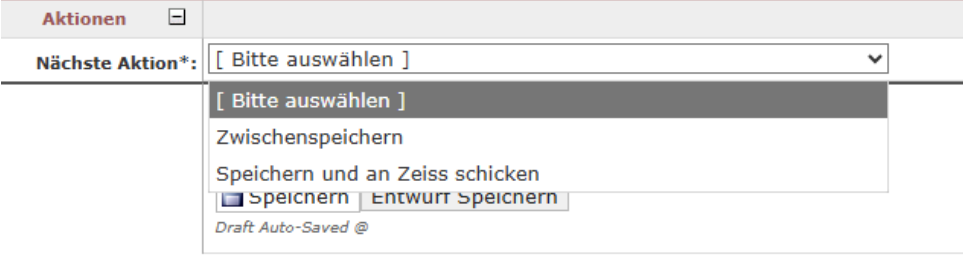
Owner: Person or subcontractor responsible for the measures.

Message to SMT: The supplier can enter an additional message to ZEISS-SMT.

Message history: In closed tickets, all messages belonging to the ticket from the supplier and from ZEISS to the supplier are displayed collectively.

Technical reason: In closed tickets, the reason given by the Zeiss specialist department for the rejection or release decision is displayed here.

12.8 Activities

Instruction	View
<p>Here, the supplier selects the next step in the creation of the special release request. The selected next activity is then triggered with the Save button:</p> <p>Save as draft: Saves the draft for later further processing by the supplier. No message is sent to Zeiss yet. Due to technical limitations not all data is saved but must be entered again when opening the draft.</p> <p>Save and send to Zeiss: The request creation is completed; the request is saved and a notification about the new ticket is sent to ZEISS.</p>	

12.9 Notifications

12.9.1 Notification about Ticket Return

If a ticket has been returned by ZEISS and sent back to the supplier, the applicant is informed of this via e-mail. The ticket must be corrected in the Jaggaer portal and sent back to ZEISS again.

12.9.2 Error Message Material Number

After submitting the request, the system checks if the material numbers are filled in correctly. If the material numbers do not match, the supplier will receive an e-mail notification as follows:

Dear ...,

The following deviation request could not be submitted due to incorrect input:

ID: TAxxxxxx

Material: 000000-1234-123

The following error was detected: specified material numbers do not match.

Please check and correct the deviation request on our portal under the following link:...

The ticket can now be accessed under "Tickets" and once the correction has been made, the ticket can be sent to ZEISS again.

12.9.3 Error Message Mandatory Fields

If a request shall be sent although not all mandatory fields have been filled in, a window appears with a corresponding error message. The mandatory fields in the request form which still need to be filled in are marked.

12.9.4 Error Message Number Format

If a value was entered in a different number format, a pop-up window appears with an error message.

12.10 Ticket Completion

When the request has passed all revisions at the related ZEISS departments (purchaser, developer and quality manager), the deviation request process is completed.

An automatic notification e-mail is sent to the supplier and the related ZEISS departments. The completion document (PDF) is also attached to this e-mail:

Subject: JAGGAER: Completion deviation request TAxXXXXX

Dear...,

The following deviation request has been completed:

ID:

Material:

Supplier:

Type of defect:

The deviation request can be viewed on our portal under the following link:

The status of the request is marked as "Closed" in the system.

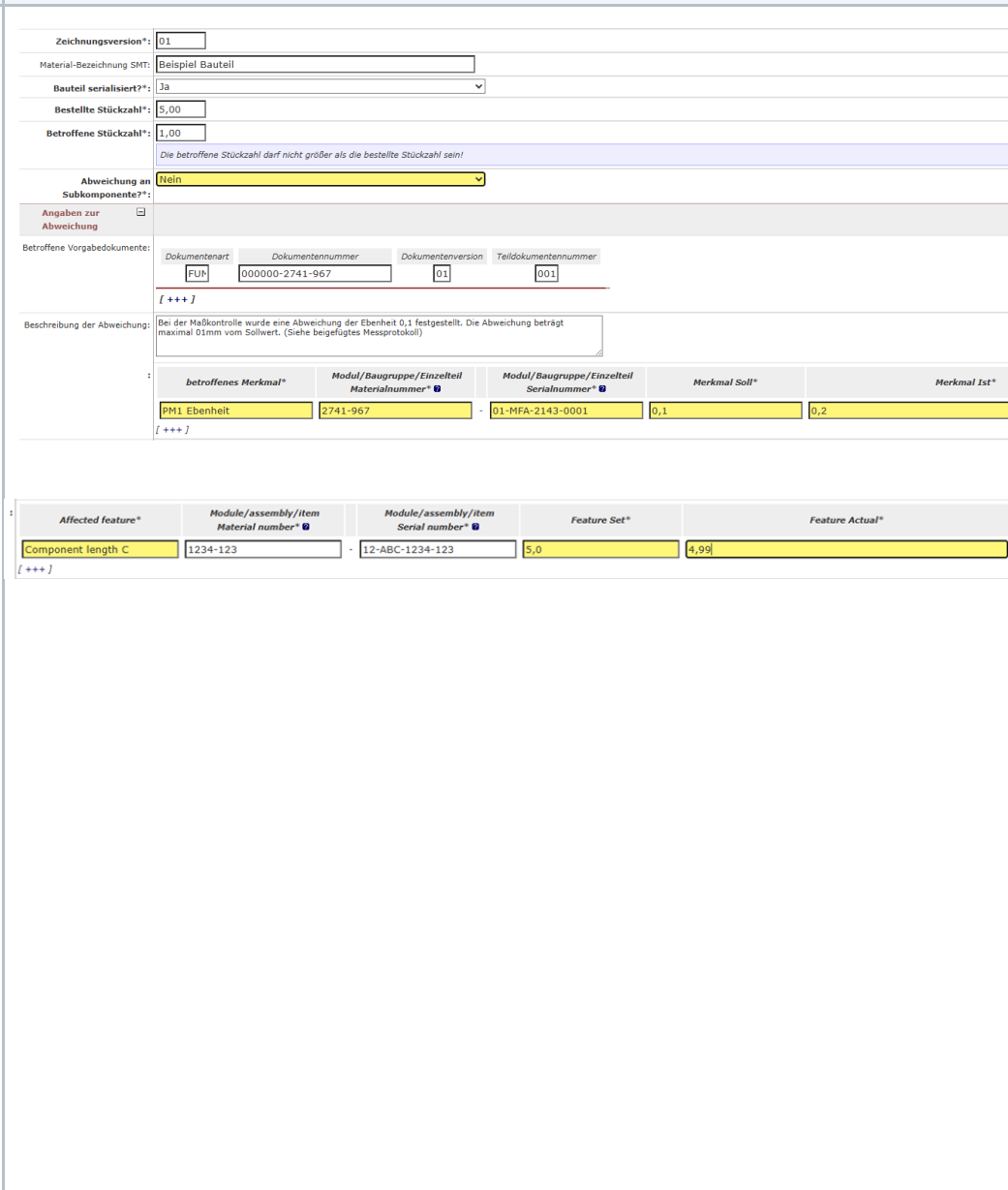
If the deviation has been **accepted** and all information was correctly entered, the component is **released**. The completion PDF must be sent to ZEISS together with the delivery.

If the deviation of the component has **not** been **accepted**, the request for the related component is **rejected** and no delivery release will be granted.


In the case of a deviation request for a subcomponent in a module whose serial number is not known when the request is submitted, there is the option of a **pre-release**. In this case, the serial number of the module is entered later by the supplier after the deviation of the subcomponent has been accepted by ZEISS. After sending to ZEISS the ticket will be closed in the system and the delivery release will be issued.

12.11 Examples

12.11.1 Example: Serialized Component

Instruction	View																												
<p>The following example shows a deviation at a serialized single component. For this, the queries for serialization and subcomponent must be answered as follows when filling in the details for material & order:</p> <p>Component serialized? YES</p> <p>Deviation on Subcomponent? NO</p> <p>Under Deviation information, further information on the deviation is entered.</p> <p>Note: Required specification of the material number from "Material & order specifications" without leading zeros. Together with the serial number, this results in the serial number of the part.</p>	 <p>The screenshot displays a SAP deviation report for a serialized component. The report includes the following information:</p> <ul style="list-style-type: none"> Zeichnungsversion*: 01 Material-Bezeichnung SMT: Beispiel Bauteil Bauteil serialisiert?*: Ja Bestellte Stückzahl*: 5,00 Betroffene Stückzahl*: 1,00 Abweichung an Subkomponente?*: Nein Betroffene Vorgabedokumente: <table border="1"> <thead> <tr> <th>Dokumententart</th> <th>Dokumentennummer</th> <th>Dokumentenversion</th> <th>Teildokumentennummer</th> </tr> </thead> <tbody> <tr> <td>FUH</td> <td>000000-2741-967</td> <td>01</td> <td>001</td> </tr> </tbody> </table> Beschreibung der Abweichung: Bei der Maßkontrolle wurde eine Abweichung der Ebenheit 0,1 festgestellt. Die Abweichung beträgt maximal 01mm vom Sollwert. (Siehe beigefügtes Messprotokoll) Table of affected features: <table border="1"> <thead> <tr> <th>betroffenes Merkmal*</th> <th>Modul/Baugruppe/Einzelteil Materialnummer* ④</th> <th>Modul/Baugruppe/Einzelteil Seriennummer* ④</th> <th>Merkmal Soll*</th> <th>Merkmal Ist*</th> </tr> </thead> <tbody> <tr> <td>PM1 Ebenheit</td> <td>2741-967</td> <td>01-MFA-2143-0001</td> <td>0,1</td> <td>0,2</td> </tr> </tbody> </table> Table of affected features (Detailed): <table border="1"> <thead> <tr> <th>Affected feature*</th> <th>Module/assembly/item Material number* ④</th> <th>Module/assembly/item Serial number* ④</th> <th>Feature Set*</th> <th>Feature Actual*</th> </tr> </thead> <tbody> <tr> <td>Component length C</td> <td>1234-123</td> <td>12-ABC-1234-123</td> <td>5,0</td> <td>4,99</td> </tr> </tbody> </table> 	Dokumententart	Dokumentennummer	Dokumentenversion	Teildokumentennummer	FUH	000000-2741-967	01	001	betroffenes Merkmal*	Modul/Baugruppe/Einzelteil Materialnummer* ④	Modul/Baugruppe/Einzelteil Seriennummer* ④	Merkmal Soll*	Merkmal Ist*	PM1 Ebenheit	2741-967	01-MFA-2143-0001	0,1	0,2	Affected feature*	Module/assembly/item Material number* ④	Module/assembly/item Serial number* ④	Feature Set*	Feature Actual*	Component length C	1234-123	12-ABC-1234-123	5,0	4,99
Dokumententart	Dokumentennummer	Dokumentenversion	Teildokumentennummer																										
FUH	000000-2741-967	01	001																										
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PM1 Ebenheit	2741-967	01-MFA-2143-0001	0,1	0,2																									
Affected feature*	Module/assembly/item Material number* ④	Module/assembly/item Serial number* ④	Feature Set*	Feature Actual*																									
Component length C	1234-123	12-ABC-1234-123	5,0	4,99																									

12.11.2 Example: Non-serialized Component

Instruction	View								
<p>The following example shows a deviation on a non-serialized single part. For this, the queries for serialization and subcomponent must be answered as follows when filling in the details for material & order:</p> <p>Component serialized? NO</p> <p>Deviation on Subcomponent? NO</p> <p>Under Details of deviation, only the batch number of the component affected by the deviation must be entered, because the associated material number has already been entered under "Information of material & order".</p>	<div data-bbox="450 421 1497 1003"> <p>Information about Material & Order <input type="checkbox"/></p> <p>Order number*: <input type="text"/></p> <p>Order position*: <input type="text"/></p> <p>Purchaser*: [Please Select] <input type="button" value="v"/></p> <p>Delivery date*: <input type="text"/> </p> <p>Material-No. SMT*: <input type="text"/></p> <p><i>Format: 000000-1234-123</i></p> <p>Drawing version*: <input type="text"/></p> <p>Material description SMT: <input type="text"/></p> <p>Component serialized?*: No <input type="button" value="v"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p><i>The affected quantity must not be greater than the ordered quantity!</i></p> <p>Deviation at subcomponent?*: No <input type="button" value="v"/></p> </div> <div data-bbox="450 1014 1497 1093"> <table border="1"> <thead> <tr> <th>Affected feature*</th> <th>Module/assembly Batch number*</th> <th>Feature Set*</th> <th>Feature Actual*</th> </tr> </thead> <tbody> <tr> <td>Component length C</td> <td>1234567890ABC</td> <td>5,0</td> <td>4,9</td> </tr> </tbody> </table> <p>[+++]</p> </div>	Affected feature*	Module/assembly Batch number*	Feature Set*	Feature Actual*	Component length C	1234567890ABC	5,0	4,9
Affected feature*	Module/assembly Batch number*	Feature Set*	Feature Actual*						
Component length C	1234567890ABC	5,0	4,9						

12.11.3 Example: Module/Assembly with Subcomponents

Instruction	View																					
<p>The following example shows a deviation on a serialized component in a serialized module or assembly. The details for Material & Ordering, serialization, subcomponent and set order must be entered as follows:</p> <p>Component serialized: YES</p> <p>Deviation to subcomponent: YES</p> <p>Component serialized: YES</p> <p>Set order: NO</p> <p>Under Deviation information, the material number (without leading zeros) and the serial number of the module/assembly must be entered as follows:</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Component serialized?*: Yes <input type="text"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p style="font-size: small; color: #4a7ebb;">The affected quantity must not be greater than the ordered quantity!</p> <p>Deviation at subcomponent?*: Yes <input type="text"/></p> <p>Material-No. SMT*: <input type="text"/></p> <p style="font-size: small; color: #4a7ebb;">Format: 000000-1234-123</p> <p>Drawing version*: <input type="text"/></p> <p>Material description SMT*: <input type="text"/></p> <p>Component serialized?*: Yes <input type="text"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p>Set Order*: No <input type="text"/></p> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="font-size: x-small;">Affected feature</th> <th style="font-size: x-small;">Module/assembly/Item Material number</th> <th style="font-size: x-small;">Module/assembly/Item Serial number</th> <th style="font-size: x-small;">Material number subcomponent</th> <th style="font-size: x-small;">Serial number subcomponents</th> <th style="font-size: x-small;">Feature Set</th> <th style="font-size: x-small;">Feature Actual</th> </tr> </thead> <tbody> <tr> <td style="font-size: x-small;">Component length C</td> <td style="font-size: x-small;">1234-123</td> <td style="font-size: x-small;">02-ABC-1234-1234</td> <td style="font-size: x-small;">4321-123</td> <td style="font-size: x-small;">02-CBA-1234-1234</td> <td style="font-size: x-small;">5,0</td> <td style="font-size: x-small;">4,9</td> </tr> <tr> <td colspan="7" style="font-size: x-small;">[+++]</td> </tr> </tbody> </table>	Affected feature	Module/assembly/Item Material number	Module/assembly/Item Serial number	Material number subcomponent	Serial number subcomponents	Feature Set	Feature Actual	Component length C	1234-123	02-ABC-1234-1234	4321-123	02-CBA-1234-1234	5,0	4,9	[+++]						
Affected feature	Module/assembly/Item Material number	Module/assembly/Item Serial number	Material number subcomponent	Serial number subcomponents	Feature Set	Feature Actual																
Component length C	1234-123	02-ABC-1234-1234	4321-123	02-CBA-1234-1234	5,0	4,9																
[+++]																						

12.11.4 Example: Set-Order

Instruction	View															
<p>The following example shows the details for deviations in a set order.</p> <p>Component serialized: NO</p> <p>Deviation to subcomponent: YES</p> <p>Component serialized: YES</p> <p>Set order: YES</p> <p>The material number (without leading zeros) and serial number of the subcomponent affected by the deviation must be entered under Deviation details. In this case the material number of the ordered set is entered under Material & order details.</p>	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Component serialized?*: <input type="text" value="No"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p style="font-size: small; color: #4a7ebb;">The affected quantity must not be greater than the ordered quantity!</p> <p>Deviation at subcomponent?*: <input type="text" value="Yes"/></p> <p>Material-No. SMT*: <input type="text" value=""/></p> <p style="font-size: small; color: #4a7ebb;">Format: 000000-1234-123</p> <p>Drawing version*: <input type="text"/></p> <p>Material description SMT*: <input type="text"/></p> <p>Component serialized?*: <input type="text" value="Yes"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p>Set Order*: <input type="text" value="Yes"/></p> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="font-size: small;">Affected feature*</th> <th style="font-size: small;">Material number subcomponent* </th> <th style="font-size: small;">Serial number subcomponents* </th> <th style="font-size: small;">Feature Set*</th> <th style="font-size: small;">Feature Actual*</th> </tr> </thead> <tbody> <tr> <td style="background-color: #ffff00;">Component length C</td> <td>1234-123</td> <td>12345678</td> <td style="background-color: #ffff00;">5,0</td> <td>4,9</td> </tr> <tr> <td colspan="5" style="font-size: x-small;">[+++]</td> </tr> </tbody> </table>	Affected feature*	Material number subcomponent*	Serial number subcomponents*	Feature Set*	Feature Actual*	Component length C	1234-123	12345678	5,0	4,9	[+++]				
Affected feature*	Material number subcomponent*	Serial number subcomponents*	Feature Set*	Feature Actual*												
Component length C	1234-123	12345678	5,0	4,9												
[+++]																

12.11.5 Example: Special Case Pre-Release

Instruction	View														
<p>The following example shows the information for an application for the pre-release of a sub-component of a module for which the serial number is not yet known when the application is submitted.</p> <p>Component serialized: YES</p> <p>Deviation to subcomponent: YES</p> <p>Component serialized: YES</p> <p>Set order: NO</p> <p>Under Deviation information, the material number of the module/assembly (without leading zeros) is entered, but instead of the serial number of the module of the subcomponent, only a "-" character is entered in the field. The material and serial number of the subcomponent are entered as before.</p>	<div style="border: 1px solid black; padding: 5px;"> <p>Component serialized?*: Yes <input type="text"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p style="font-size: small; color: blue;">The affected quantity must not be greater than the ordered quantity!</p> <p>Deviation at subcomponent?*: Yes <input type="text"/></p> <p>Material-No. SMT*: <input type="text"/></p> <p style="font-size: small; color: blue;">Format: 000000-1234-123</p> <p>Drawing version*: <input type="text"/></p> <p>Material description SMT*: <input type="text"/></p> <p>Component serialized?*: Yes <input type="text"/></p> <p>Ordered parts*: <input type="text"/></p> <p>Affected number of parts*: <input type="text"/></p> <p>Set Order*: No <input type="text"/></p> </div> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th>Affected feature</th> <th>Module/assembly/item Material number</th> <th>Module/assembly/item Serial number</th> <th>Material number subcomponent</th> <th>Serial number subcomponents</th> <th>Feature Set</th> <th>Feature Actual</th> </tr> </thead> <tbody> <tr> <td>Component length C</td> <td>1234-123</td> <td>-</td> <td>1221-123</td> <td>02-CBA-1234-1234</td> <td>5,0</td> <td>4,9</td> </tr> </tbody> </table> <p>[***]</p>	Affected feature	Module/assembly/item Material number	Module/assembly/item Serial number	Material number subcomponent	Serial number subcomponents	Feature Set	Feature Actual	Component length C	1234-123	-	1221-123	02-CBA-1234-1234	5,0	4,9
Affected feature	Module/assembly/item Material number	Module/assembly/item Serial number	Material number subcomponent	Serial number subcomponents	Feature Set	Feature Actual									
Component length C	1234-123	-	1221-123	02-CBA-1234-1234	5,0	4,9									

13 Toolmanagement

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13.3	Update Tools	134
13.3.1	Instructions for the Update	134

13.1 Introduction

What is Tool Management?

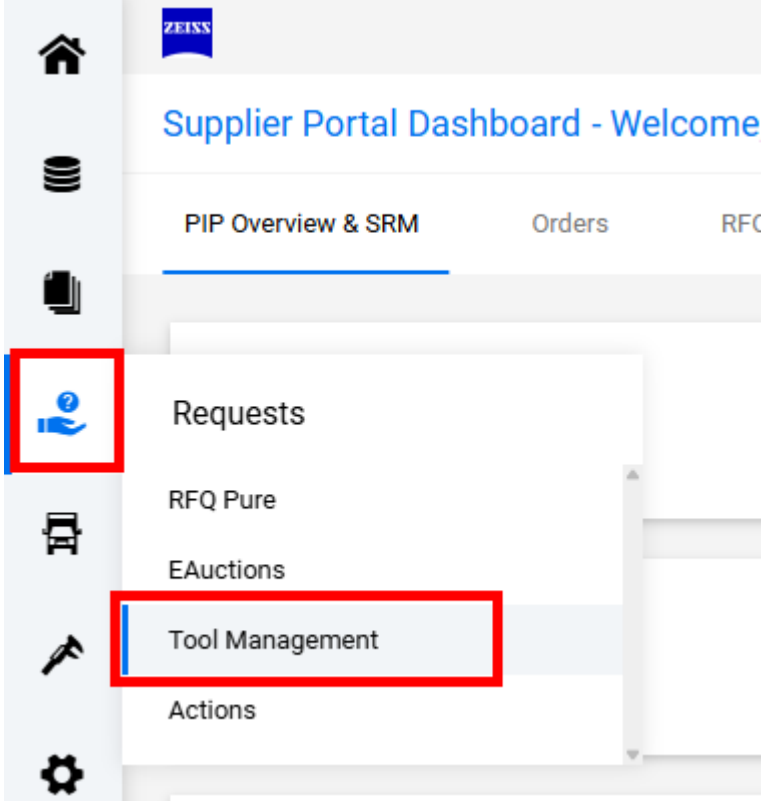
PIP Tool Management offers the possibility of digitally monitoring the inventory, status and financial details of the production tools used at the supplier's site at every stage of the production process.

The module supports purchasing in supplier management and thus promotes communication and collaboration with suppliers. Automated status queries and timely exchange information avoid bottlenecks.

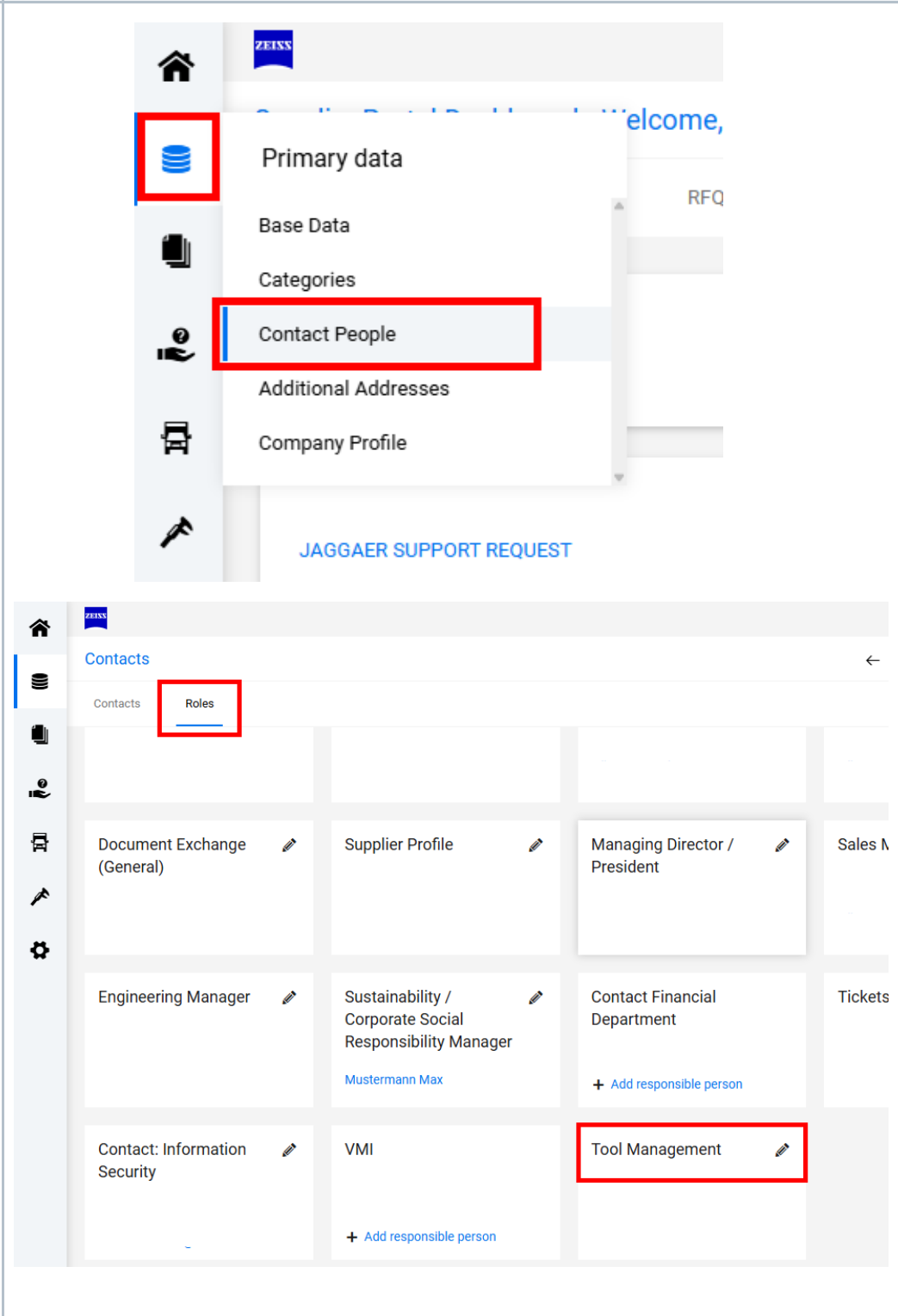
The ZEISS-wide connection provides transparency about all supplier tools, including location and status data.

13.2 General information on how to use Tool Management

13.2.1 Navigation

Instruction	View
<p>You can find the tool management under "Requests" area.</p>	 <p>The screenshot shows the 'Supplier Portal Dashboard - Welcome' interface. On the left sidebar, there are several icons: a home icon, a database icon, a document icon, a hand with a question mark icon (highlighted with a red box), a chair icon, a wrench icon, and a gear icon. A dropdown menu is open from the hand icon, listing 'Requests', 'RFQ Pure', 'EAuctions', 'Tool Management' (highlighted with a red box), and 'Actions'. The top navigation bar includes 'PIP Overview & SRM', 'Orders', and 'RFC'.</p>

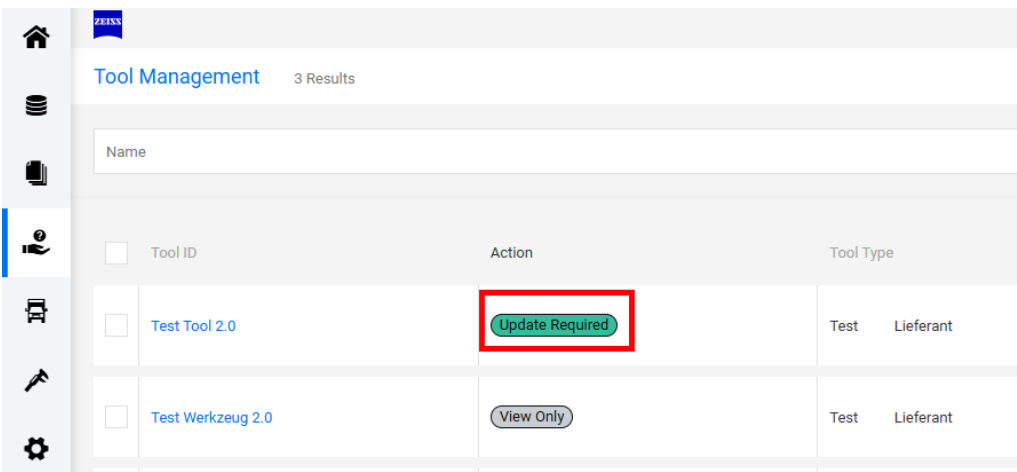
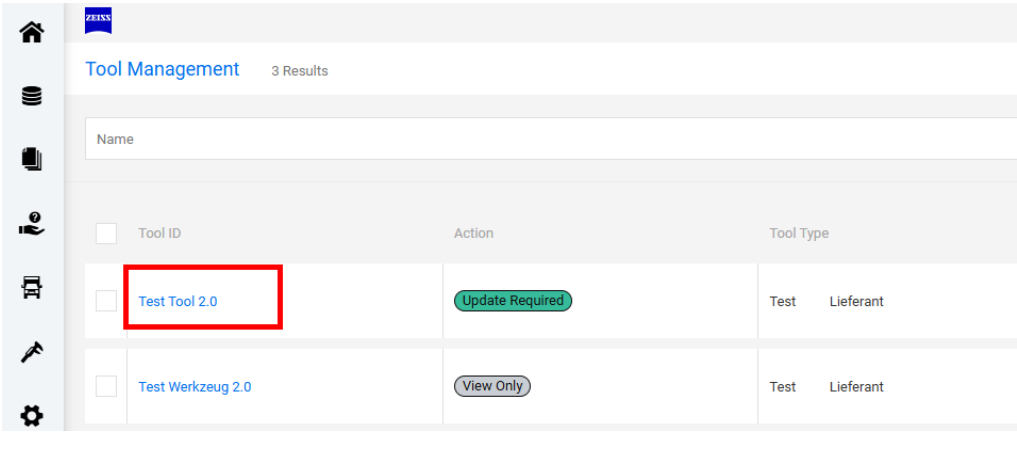
13.2.2 Role assignment

Instruction	View
<p>In the Primary data / Contact people area, the assignment can be modified in the tab "Roles".</p>	 <p>The screenshot shows the ZEISS user interface. In the top-left navigation menu, the 'Primary data' icon (a blue database symbol) is highlighted with a red box. A dropdown menu is open, showing options: 'Primary data', 'Base Data', 'Categories', 'Contact People', 'Additional Addresses', and 'Company Profile'. The 'Contact People' option is also highlighted with a red box. Below this, the 'Contacts' page is visible, with the 'Roles' tab highlighted by a red box. The main content area displays a grid of contact-related items, each with an edit icon (pencil). The 'Tool Management' item in the bottom-right cell of the grid is highlighted with a red box.</p>

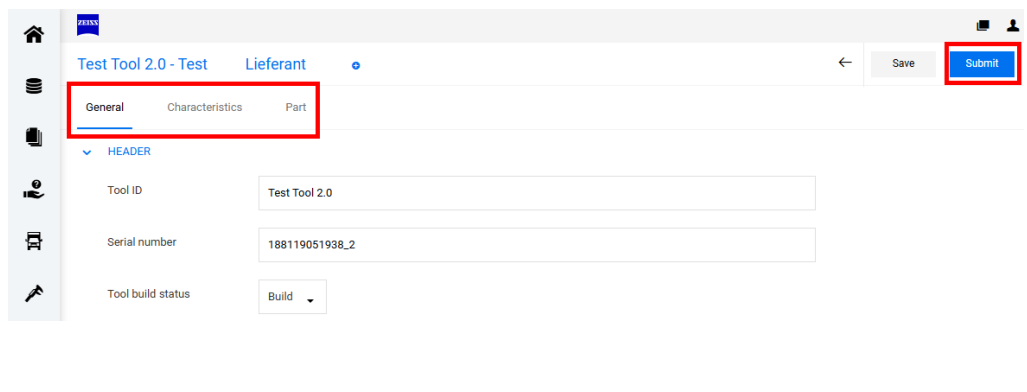
13.3 Update tools

In PIP Tool Management, it is possible to access data or the status of the tools used by the supplier at any time. Updates may be necessary and desired depending on requirements.



13.3.1 Instructions for the Update

Instruction	View									
<p>1. Following a request from the ZEISS purchaser or after a certain interval, the supplier receives an e-mail with a request for an update. The link contained in the e-mail can be used or the supplier can log in with his own login data.</p> <p>On the main page of PIP Tool Management all supplier tools are listed. The tool being updated has the action status "Update Required".</p>	 <table border="1"> <thead> <tr> <th>Tool ID</th> <th>Action</th> <th>Tool Type</th> </tr> </thead> <tbody> <tr> <td>Test Tool 2.0</td> <td>Update Required</td> <td>Test Lieferant</td> </tr> <tr> <td>Test Werkzeug 2.0</td> <td>View Only</td> <td>Test Lieferant</td> </tr> </tbody> </table>	Tool ID	Action	Tool Type	Test Tool 2.0	Update Required	Test Lieferant	Test Werkzeug 2.0	View Only	Test Lieferant
Tool ID	Action	Tool Type								
Test Tool 2.0	Update Required	Test Lieferant								
Test Werkzeug 2.0	View Only	Test Lieferant								
<p>2. The data required for the update can be adjusted in the respective tool. This may affect current usage data, the condition or restocking data. Select "Tool ID" to edit the tool data.</p>	 <table border="1"> <thead> <tr> <th>Tool ID</th> <th>Action</th> <th>Tool Type</th> </tr> </thead> <tbody> <tr> <td>Test Tool 2.0</td> <td>Update Required</td> <td>Test Lieferant</td> </tr> <tr> <td>Test Werkzeug 2.0</td> <td>View Only</td> <td>Test Lieferant</td> </tr> </tbody> </table>	Tool ID	Action	Tool Type	Test Tool 2.0	Update Required	Test Lieferant	Test Werkzeug 2.0	View Only	Test Lieferant
Tool ID	Action	Tool Type								
Test Tool 2.0	Update Required	Test Lieferant								
Test Werkzeug 2.0	View Only	Test Lieferant								

3. After all data has been added in the tabs **General**, **Characteristics** and **Part**, the transfer to the ZEISS purchaser is completed by selecting button **"Submit"**.



4. Thus, the update will be saved. The ZEISS purchaser receives the information and can access the changes. He/she will approve or reject the changes and can take the necessary measures, e.g. initiate a replenishment or announce critical delivery bottlenecks. The status of the tool changes accordingly.

<input type="checkbox"/>	Tool ID	Action	Tool Type	Tool build status	Tool location	Status
<input type="checkbox"/>	Test Tool 2.0	Update Required	Test Lieferant	Build	Anytown	
<input type="checkbox"/>	Test Tool 2.0	View Only	Test Lieferant	Ready For Production	Anytown	

14 Actions

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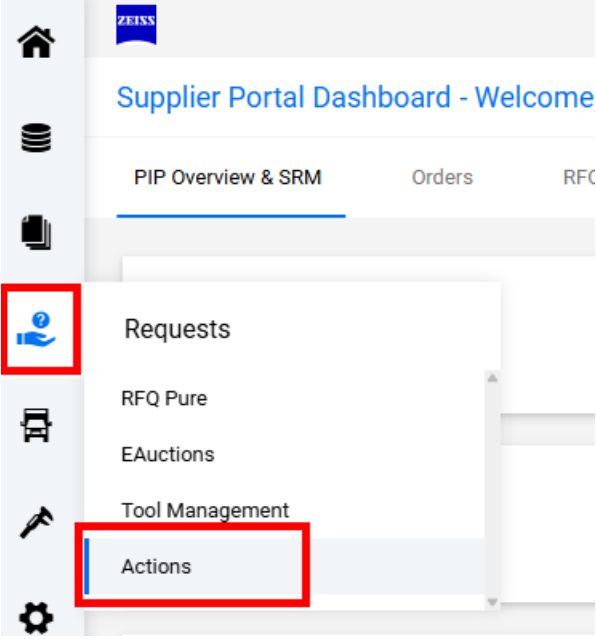
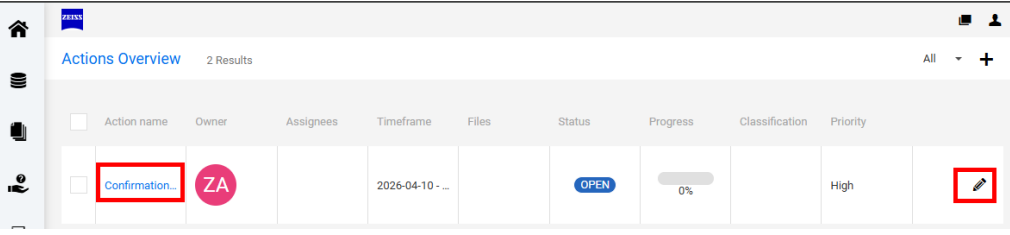
14.1 Introduction

PIP Actions enables your ZEISS contact to assign tasks to you in the ZEISS PIP supplier portal.

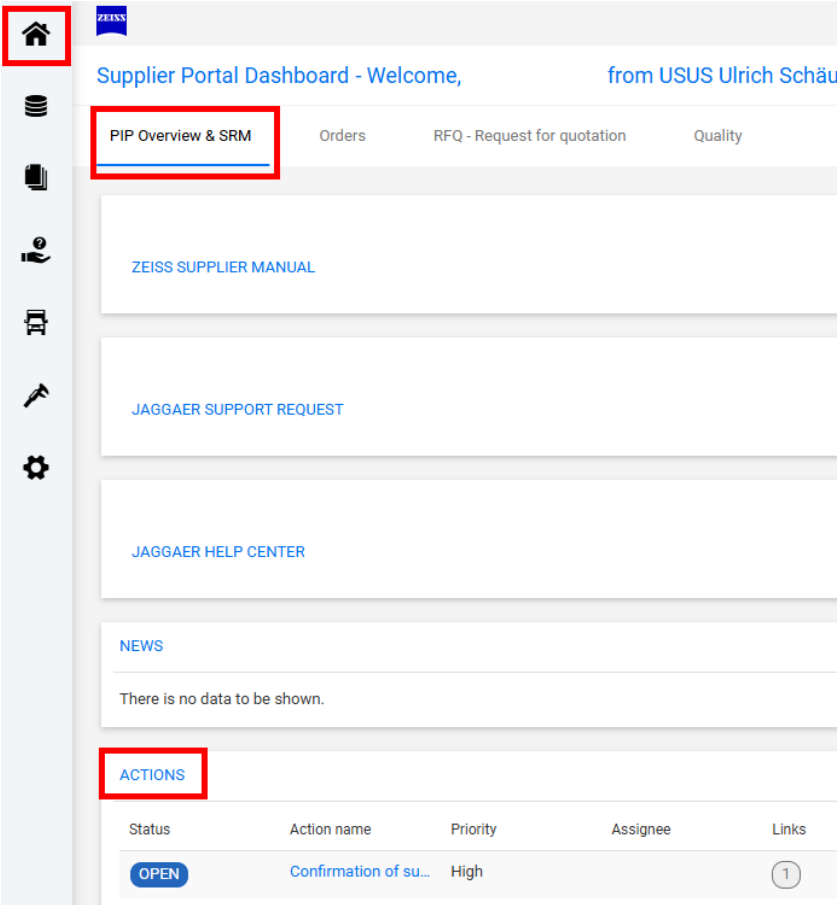
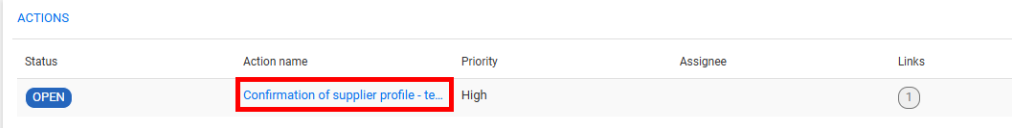
Each action contains a description and a period of time specified by the ZEISS contact person during which the respective request must be completed.

14.2 Instructions for Actions

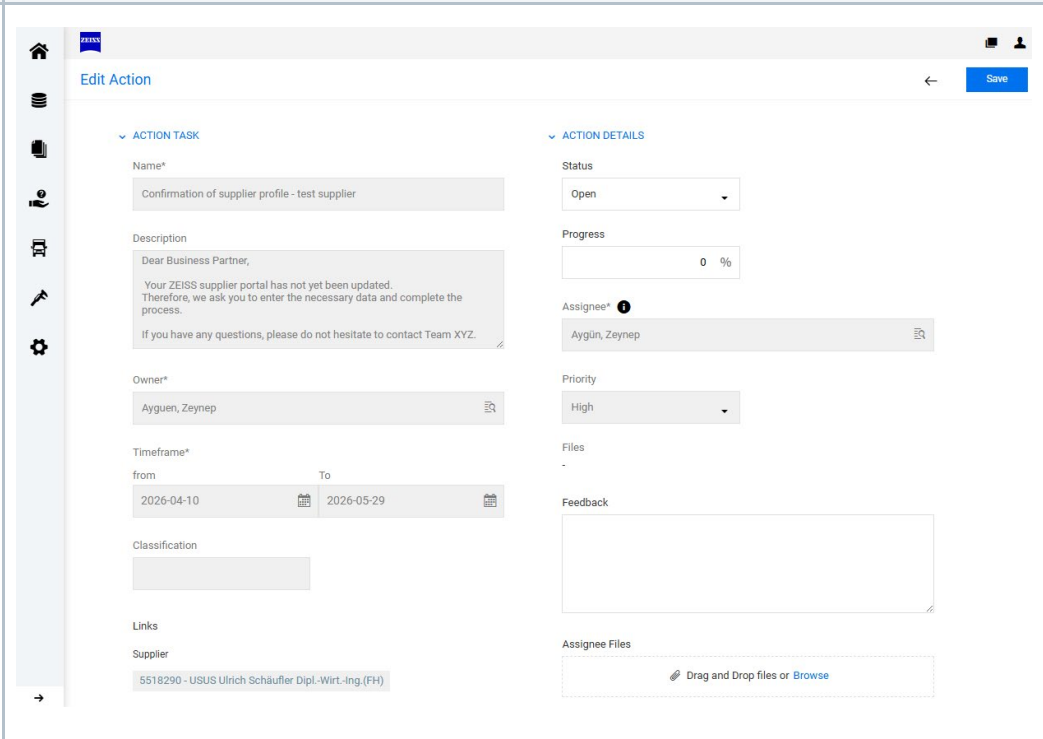
14.2.1 Open Actions

Instruction	View																						
<p>1. Click on the Requests icon.</p> <p>2. Select Actions.</p>																							
<p>3. Click either on "Action Name" or on the pen icon to open the action.</p>	 <table border="1" data-bbox="518 1344 1476 1478"> <thead> <tr> <th><input type="checkbox"/></th> <th>Action name</th> <th>Owner</th> <th>Assignees</th> <th>Timeframe</th> <th>Files</th> <th>Status</th> <th>Progress</th> <th>Classification</th> <th>Priority</th> <th><input type="checkbox"/></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Confirmation</td> <td>ZA</td> <td></td> <td>2026-04-10 - ...</td> <td></td> <td>OPEN</td> <td>0%</td> <td></td> <td>High</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	<input type="checkbox"/>	Action name	Owner	Assignees	Timeframe	Files	Status	Progress	Classification	Priority	<input type="checkbox"/>	<input type="checkbox"/>	Confirmation	ZA		2026-04-10 - ...		OPEN	0%		High	<input type="checkbox"/>
<input type="checkbox"/>	Action name	Owner	Assignees	Timeframe	Files	Status	Progress	Classification	Priority	<input type="checkbox"/>													
<input type="checkbox"/>	Confirmation	ZA		2026-04-10 - ...		OPEN	0%		High	<input type="checkbox"/>													

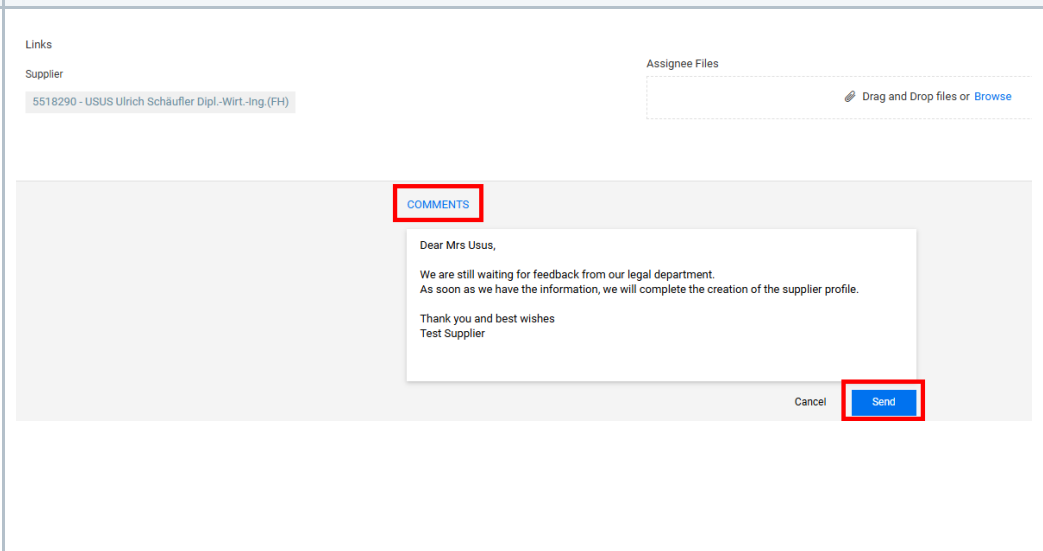
Alternative

Instruction	View
<p>1. On the main page, click on tab "PIP Overview & SRM".</p> <p>2. You can find your actions in the tile Actions.</p>	
<p>3. Click on the "Action Name" to open the action.</p>	

14.2.2 General

Instruction	View
<p>You can view the following data in each action:</p> <ul style="list-style-type: none"> • Name of action • Description • Owner (Creator) • Time frame: start and end date • Status and progress • Assignee (supplier) • Priority • Links / Files 	

14.2.3 Communication in Actions

Instruction	View
<p>In the lower section of the action, you have the option of sending information to your ZEISS contact.</p> <p>To do this, enter your text under Comments and click on "Send".</p> <p>Your contact will be informed by e-mail of the receipt of a comment.</p>	

Your contact person also has the option of sending you information via "**Comments**".

You can view the **history** of your communication in the respective action at any time.

COMMENTS

Type Comment ...

Cancel **Send**

A 2026-04-10

Dear Business Partner,

Thank you very much for the information.
Please set the status to "check" and the progress to "100%" as soon as the creation of the supplier portal has been completed.

Thank you very much.

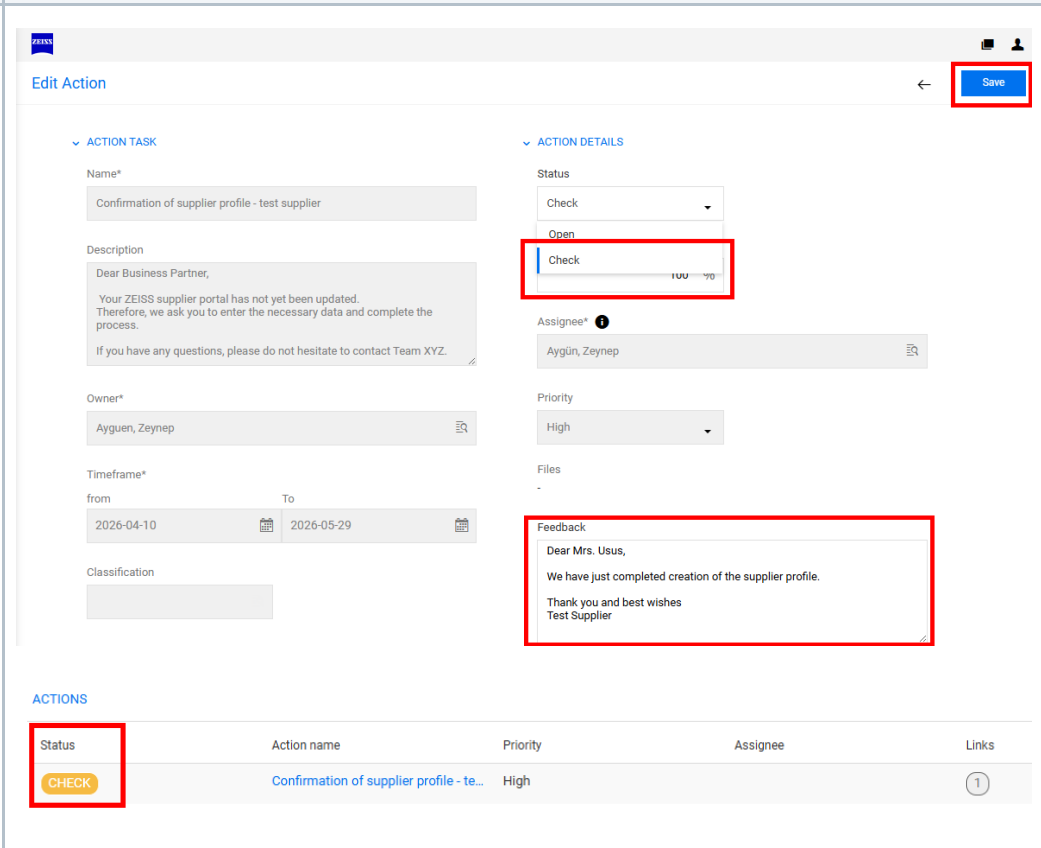
A 2026-04-10

Dear Mrs Usus,

We are still waiting for feedback from our legal department.
As soon as we have the information, we will complete the creation of the supplier profile.

Thank you and best wishes
Test Supplier

14.2.4 Complete Actions

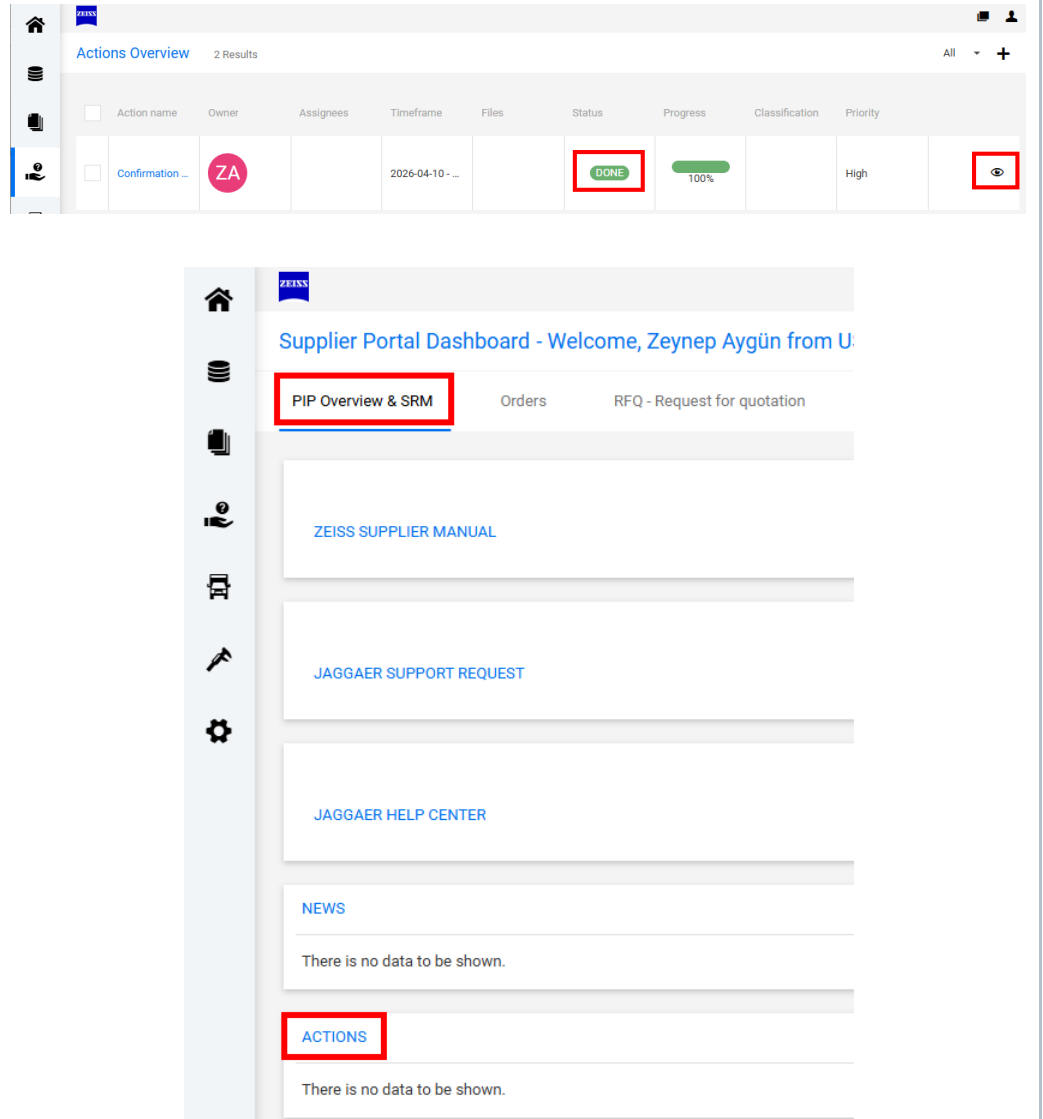
Instruction	View										
<p>As soon as you have completed the request, set the status to check, the progress to 100%. Optionally, you can send a message in the Feedback field.</p> <p>Then save.</p> <p>Your ZEISS contact will receive an e-mail notification.</p> <p>The status of the action is now check.</p>	 <p>Save</p> <p>ACTION TASK</p> <p>Name* Confirmation of supplier profile - test supplier</p> <p>Description Dear Business Partner, Your ZEISS supplier portal has not yet been updated. Therefore, we ask you to enter the necessary data and complete the process. If you have any questions, please do not hesitate to contact Team XYZ.</p> <p>Owner* Ayguen, Zeynep</p> <p>Timeframe* from 2026-04-10 To 2026-05-29</p> <p>Classification</p> <p>ACTION DETAILS</p> <p>Status Check</p> <p>Assignee* Ayguen, Zeynep</p> <p>Priority High</p> <p>Files</p> <p>Feedback Dear Mrs. Usus, We have just completed creation of the supplier profile. Thank you and best wishes Test Supplier</p> <p>ACTIONS</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Action name</th> <th>Priority</th> <th>Assignee</th> <th>Links</th> </tr> </thead> <tbody> <tr> <td>CHECK</td> <td>Confirmation of supplier profile - te...</td> <td>High</td> <td></td> <td>1</td> </tr> </tbody> </table>	Status	Action name	Priority	Assignee	Links	CHECK	Confirmation of supplier profile - te...	High		1
Status	Action name	Priority	Assignee	Links							
CHECK	Confirmation of supplier profile - te...	High		1							

Your action will be checked by the **owner** (creator).

If the requirements are met, the owner sets the status to **done**.

You can view the action via the **eye icon** at any time.

Completed actions will **no** longer be found in the dashboard under the tile **Actions**.



The screenshot displays two parts of the Zeiss Supplier Portal interface. The top part is the 'Actions Overview' table, and the bottom part is the 'Supplier Portal Dashboard'.

Actions Overview Table:

Action name	Owner	Assignees	Timeframe	Files	Status	Progress	Classification	Priority
Confirmation ...	ZA		2026-04-10 - ...		DONE	100%		High

Supplier Portal Dashboard:

Supplier Portal Dashboard - Welcome, Zeynep Aygün from U

- PIP Overview & SRM
- Orders
- RFQ - Request for quotation
- ZEISS SUPPLIER MANUAL
- JAGGAER SUPPORT REQUEST
- JAGGAER HELP CENTER
- NEWS
- There is no data to be shown.
- ACTIONS
- There is no data to be shown.