



IBM Web EDI Portal Training

Contents

| | |
|---|----|
| Training Overview | 2 |
| Login Screen..... | 2 |
| Getting Help..... | 3 |
| Common Error Scenarios and Resolution Steps | 3 |
| Advanced Search..... | 5 |
| Document Folders..... | 5 |
| Forecast/Shipping Schedule..... | 7 |
| Header View:..... | 8 |
| Schedule View..... | 8 |
| Schedule Corrections | 9 |
| Advanced Shipping Notice (ASN) | 10 |
| Header View:..... | 11 |
| Line View:..... | 11 |

Training Overview

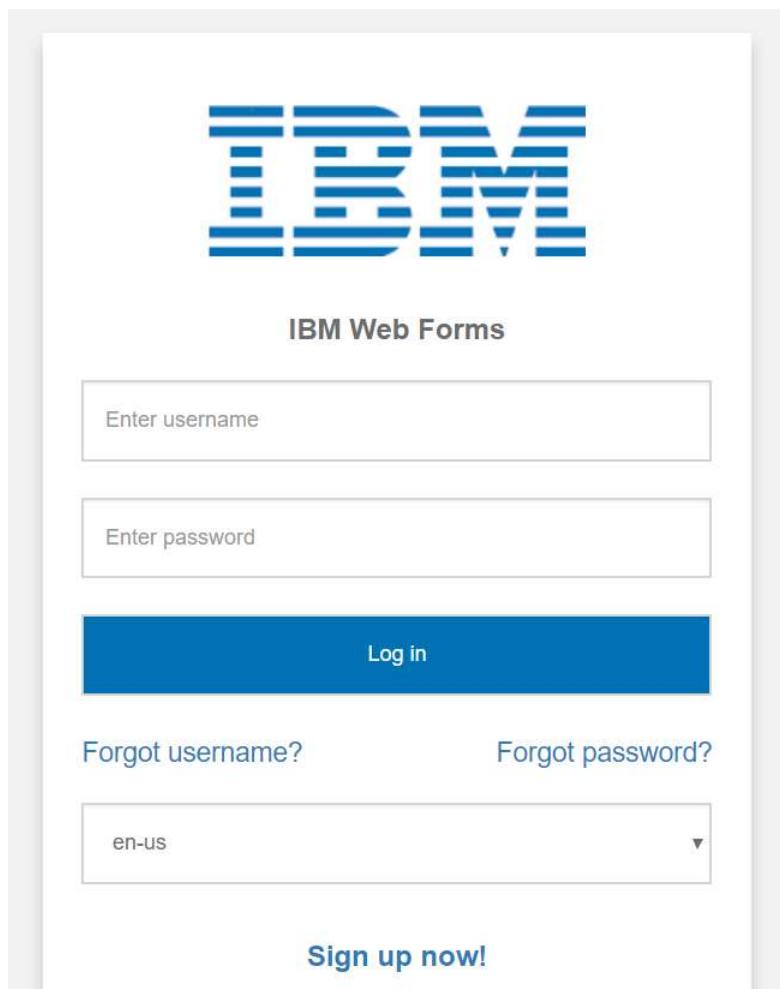
Welcome to IBM Web EDI Portal, the next generation of EDI / B2B Web Portals. This portal elevates the communication and visibility between Plastic Omnium Lighting and its Suppliers through every step of the document flow. With flexibility to incorporate any business rules, it ensures that we Improved Compliance from our Supply Chain and the Suppliers have confidence that their products are getting to the right place at the right time.

Login Screen

Follow these steps by going to <https://webforms.b2b.ibmcloud.com/Login/ibmlogin.aspx>

Log in with your Username and your Password.

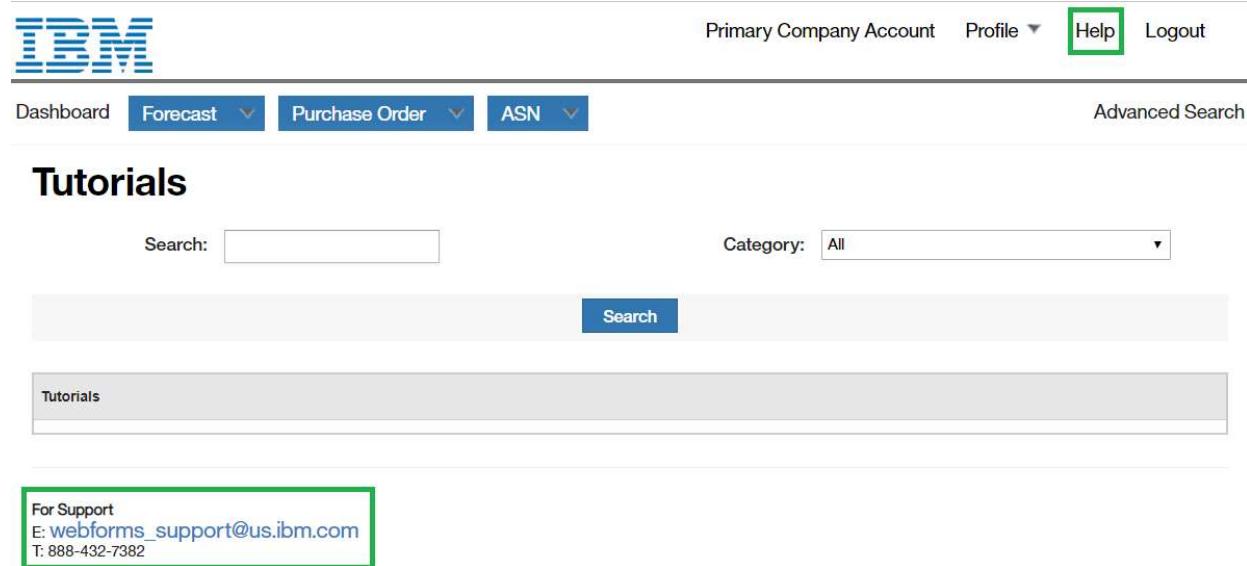
If you forget your Username or Password, you can click on the links and follow the instructions to recover your login information.



The image shows the IBM Web Forms login screen. At the top is the IBM logo. Below it is the text "IBM Web Forms". There are two input fields: "Enter username" and "Enter password". A large blue "Log in" button is centered below the password field. At the bottom left is a link "Forgot username?", and at the bottom right is a link "Forgot password?". A language selection dropdown menu shows "en-us". At the very bottom center is a link "Sign up now!".

Getting Help

Clicking the “Help” link at the top of any screen will bring up any tutorials that have been posted for your community.



The screenshot shows the IBM web interface. At the top, there is a navigation bar with the IBM logo, 'Primary Company Account', 'Profile', 'Help' (which is highlighted with a green box), and 'Logout'. Below the navigation bar, there are tabs for 'Dashboard', 'Forecast' (with a dropdown arrow), 'Purchase Order' (with a dropdown arrow), 'ASN' (with a dropdown arrow), and 'Advanced Search'. The main content area is titled 'Tutorials'. It features a search bar with 'Search:' and a dropdown for 'Category: All'. A 'Search' button is located below the search bar. Below the search bar, there is a list of items, with the first item 'Tutorials' highlighted. At the bottom of the list, there is a box containing support contact information: 'For Support', 'E: webforms_support@us.ibm.com', and 'T: 888-432-7382'. This contact box is also highlighted with a green box.

IBM Support is open 8:00 AM to 11:00 PM Eastern Time, Monday to Friday (excluding holidays) and can be reached at 1-888-432-7382 or webforms_support@us.ibm.com.

Common Error Scenarios and Resolution Steps

Problem: I can't log in

Solution: Choose Forgot Username or Forgot Password from the login screen.

Problem: My account is locked

Solution: You attempted too many unsuccessful logins, please contact IBM support.

Problem: No email notifications

Solution: Check Profile > Email Subscriptions.

Problem: Why do I see the Forecast Folder when I only use Shipping Schedules (or vice versa).

Solution: There may be some suppliers that use both the Forecast and the Shipping Schedule depending on which regions of Plastic Omnium Lighting they do business with. Both folders will always appear.

Problem: If system is down, how should ASN be sent?

Solution: Please contact your Buyer to inform them of delay, and support to have the issue resolved.

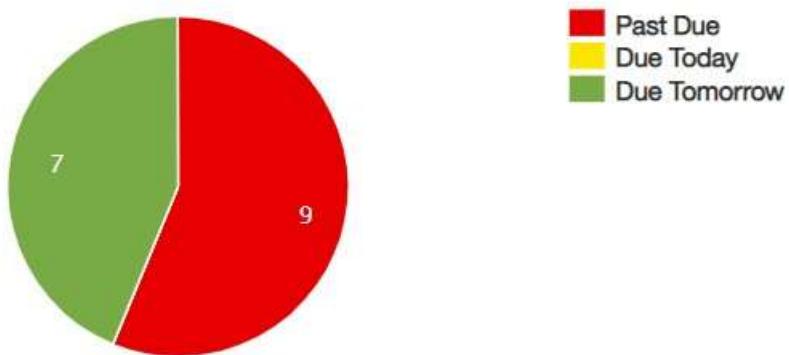
Dashboard

Upon entering the Web EDI Portal, a Dashboard is displayed. This main Dashboard shows a snapshot of activity for the account. Here, the Plastic Omnium Lighting Suppliers can easily see which Documents are next to be actioned and which Documents are overdue based on the Plastic Omnium Lighting business rules.

Dashboard **Forecast** **Shipping Schedule** **ASN**

Dashboard

Schedules Due and Overdue



Scheduled Due Pie Chart shows all items that to be sent and have an ASN created for them. Use the drop down to view different time periods. Click on the pie chart to be taken to a list of all documents that need an ASN.

Schedules Due and Overdue - Due Tomorrow

Customer: Material Number:

Date From:

Date To:

Search

1-7 of 7 Records ◀ Page of 1 ▶

| Customer | Agreement # | Sequence # | Buyer's Material # | Schedule Date | Schedule Quantity | Open Quantity |
|-----------------|-------------|------------|--------------------|---------------|-------------------|---------------|
| Varroc Lighting | 5500000289 | | 00135516-01-0000 | 21-Feb-2019 | 785 | 785 |
| Varroc Lighting | 5500001234 | | 00121860-01-0000 | 21-Feb-2019 | 340 | 140 |
| Varroc Lighting | 5500000289 | | 00135516-01-0000 | 21-Feb-2019 | 628 | 628 |

Advanced Search

At any point in the process, going into Advanced Search can help you find documents.

Dashboard

In the Advanced Search you can look for documents via many search criteria:

Search Documents

| | |
|---|--|
| Document Number: <input type="text"/> | PO Status: <input type="text" value="All"/> |
| Trading Partner: <input type="text" value="Varroc Lighting"/> | POA Status: <input type="text" value="All"/> |
| Document Type: <input type="text" value="All"/> | ASN Status: <input type="text" value="All"/> |
| Folder: <input type="text" value="All"/> | INV Status: <input type="text" value="All"/> |
| Start Date: <input type="text"/> | End Date: <input type="text"/> |
| Start Ship Date: <input type="text"/> | Lot Number: <input type="text"/> |
| Serial Number: <input type="text"/> | |
| Sales Order Number: <input type="text"/> | |
| Product Number: <input type="text"/> | |

Search

Document Folders & Document Summary

Plastic Omnium Lighting will send either a Forecast or a Shipping Schedule. In some cases, they may send both. Please navigate to the document inbox that applies to your business.

The Supplier can open any documents from the Inbox, In Process, Sent or History folders.

PO Inbox

This folder is used to store the new documents that have not been processed.

In Progress

The In Progress folder will show documents that have been partially or fully ASN.

History

The history folder will hold all ASN documents that have been completed. A Schedule will automatically move to the History folder once all open quantities have been shipped.

Forecast/Shipping Schedule

You will notice that the screens have Export View, Export, and Print Options.

Forecast - Inbox

Document Number: PO Number:

Product Number: Customer:

Filter

Export View **Export** **Print** **Tutorials**

| <input type="checkbox"/> Forecast Number | Sequence Number | Customer | Date Posted | Status |
|--|-----------------|-----------------|----------------------|--------|
| <input checked="" type="checkbox"/> 5500000289 | | Varroc Lighting | 19-Feb-2019 09:05 PM | Viewed |
| <input type="checkbox"/> 5500001234 | | Varroc Lighting | 19-Feb-2019 09:05 PM | Viewed |
| <input type="checkbox"/> 5500000288 | | Varroc Lighting | 19-Feb-2019 09:04 PM | Viewed |

Using the check boxes on the left-hand side will dictate which Schedules will be actioned. This Export will give you a quick view of which orders need to be worked on in the portal. By opening the document, you will be able to export the entire Schedule.

Suppliers are also able to search by Document Number, PO Number and Product Number.

Click anywhere on the line to open the Schedule.

Forecast - Summary

Create ASN **Print** **Save as PDF**

| | | | |
|------------------|----------------------|-------------|-------------|
| Schedule Number: | 5500000289 | Start Date: | 14-Feb-2019 |
| Schedule Date: | 14-Feb-2019 | End Date: | 09-Feb-2020 |
| Date Posted: | 19-Feb-2019 09:05 PM | | |
| Ship To: | Ship From: | | |
| Plant Code: | 0374D | | |

Parts List (1)

1-1 of 1 Records ◀ Page of 1 ▶

| Line Id | Buyer's Material Number | Description | Start Date | End Date | Total Scheduled | Received Quantity | Last Cumulative Quantity | UOM |
|---------|-------------------------|-------------|------------|------------|-----------------|-------------------|--------------------------|-----|
| 00020 | 00135516-01-0000 | 5500000289 | 2019-01-01 | 2019-02-12 | 33,127 | 1,256 | 6,751 | KG |

Click the Line Number to view the scheduled dates and Forecast Details for that item.

Header View:

Forecast - Details

| | | Print | Save as PDF |
|--|-------------|---|-------------|
| Schedule Information | | | |
| Schedule Number: | 55000000289 | Schedule Date: | 14-Feb-2019 |
| Item Information | | | |
| Line | UOM | Buyer's Material # | Description |
| 00020 | KG | 00135516-01-0000 | 55000000289 |
| Received Quantity: 1,256 | | Last Cumulative Quantity: 6,751 | |
| Cumulative Sent ASN Quantity: 6751 | | Quantity in Transit: 0 | |
| Start Date: 2019-01-01 | | End Date: 2019-02-12 | |
| Dispatch Date: 12-Feb-2019 | | | |

Schedule View:

| Forecast Information (1) | | | | | | |
|--|-------------------------|-------------|-------------|-------------------|---------------------|---------------|
| 1-52 of 52 Records ◀ Page <input type="text" value="1"/> of, 1 ► | | | | | | |
| Line Id | Buyer's Material Number | Description | Date | Schedule Quantity | Cumulative Quantity | Open Quantity |
| 00020 | 00135516-01-0000 | 55000000289 | 14-Feb-2019 | 157 | 6,908 | 157 |
| 00020 | 00135516-01-0000 | 55000000289 | 18-Feb-2019 | 785 | 7,693 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 25-Feb-2019 | 942 | 8,635 | 942 |
| 00020 | 00135516-01-0000 | 55000000289 | 04-Mar-2019 | 785 | 9,420 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 11-Mar-2019 | 942 | 10,362 | 942 |
| 00020 | 00135516-01-0000 | 55000000289 | 18-Mar-2019 | 785 | 11,147 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 25-Mar-2019 | 785 | 11,932 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 01-Apr-2019 | 785 | 12,717 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 08-Apr-2019 | 942 | 13,659 | 942 |
| 00020 | 00135516-01-0000 | 55000000289 | 15-Apr-2019 | 628 | 14,287 | 628 |
| 00020 | 00135516-01-0000 | 55000000289 | 22-Apr-2019 | 785 | 15,072 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 29-Apr-2019 | 785 | 15,857 | 785 |
| 00020 | 00135516-01-0000 | 55000000289 | 06-May-2019 | 942 | 16,799 | 942 |

Schedule Corrections

There may be times when the ASN quantity (the quantity that the Supplier has confirmed they have shipped) was incorrect. If that is the case, Suppliers need to update the schedule to reflect this discrepancy. Plastic Omnium Admins also have the ability to complete this update on behalf of the Supplier.

For example, Plastic Omnium Lighting has reported that 100 pieces arrived damaged. Add the ASN Number, QuantityChanged (in this case -100) and the Reason.

| Apply New Shipped Quantity Correction | | | | | |
|---------------------------------------|-----------------|--|--------------------------------------|------|--|
| ASN Number: | ASN000001194 | | Quantity Change:* | -100 | |
| Reason:* | Damaged Product | | <input type="button" value="Apply"/> | | |

Confirm the change:

 **Warning**

You are about to change The Cumulative Shipped Quantity from 1140 to 1040. This will affect the open quantity for this item.
Please click 'Yes' to proceed.

The quantity change has been logged and the Cumulative Shipped Quantity has been updated:

| Shipped Quantity Correction (1) | | | | | |
|-----------------------------------|--------------|------------------|-----------------------------|----------------------|-----------------|
| 1-1 of 1 Records ◀ Page 1 of 1 ► | | | | | |
| Date | ASN Number | Quantity Changed | Previously Shipped Quantity | New Shipped Quantity | Reason |
| February 20, 2019 03:42 PM | ASN000001194 | -100 | 1,140 | 1,040 | Damaged Product |

This update also needs to be applied when Plastic Omnium Lighting reports an over shipment of an item:

| Apply New Shipped Quantity Correction | | | | | |
|---------------------------------------|---------------|--|--------------------------------------|----|--|
| ASN Number: | ASN000001194 | | Quantity Change:* | 75 | |
| Reason:* | Overshippment | | <input type="button" value="Apply"/> | | |

| Shipped Quantity Correction (2) | | | | | |
|-----------------------------------|--------------|------------------|-----------------------------|----------------------|-----------------|
| 1-2 of 2 Records ◀ Page 1 of 1 ► | | | | | |
| Date | ASN Number | Quantity Changed | Previously Shipped Quantity | New Shipped Quantity | Reason |
| February 20, 2019 03:49 PM | ASN000001194 | 75 | 1,040 | 1,115 | Overshippment |
| February 20, 2019 03:42 PM | ASN000001194 | -100 | 1,140 | 1,040 | Damaged Product |

Advanced Shipping Notice (ASN)

When you ship items an ASN is required to be sent. Open the Schedule and click “Create ASN”:

Forecast - Summary

[Create ASN](#) [Print](#) [Save as PDF](#)

The next screen will allow you to search by part number and/or specific date ranges.

Use the check boxes on the left-hand side to select the items you want to include on the ASN. Use the editable quantity field to update the shipment quantity as needed.

Shipping Schedule To ASN

Material Number:

Date From:  

Date To:  

[Search](#)

| <input type="checkbox"/> | Ship Date | Ship Time | Description | Buyer's Material # | Scheduled Quantity | Open Quantity |
|-------------------------------------|-------------|-----------|-------------|--------------------|--------------------|----------------------------------|
| <input checked="" type="checkbox"/> | 14-Feb-2019 | | 5500000289 | 00135516-01-0000 | 157 | <input type="text" value="157"/> |
| <input checked="" type="checkbox"/> | 18-Feb-2019 | | 5500000289 | 00135516-01-0000 | 785 | <input type="text" value="785"/> |
| <input checked="" type="checkbox"/> | 25-Feb-2019 | | 5500000289 | 00135516-01-0000 | 942 | <input type="text" value="942"/> |

Once all of the needed items have been selected, scroll to the bottom of the page and click “Continue”. Your items will be automatically moved to the ASN.

| | | | | | |
|-------------------------------------|-------------|------------|------------------|-----|----------------------------------|
| <input checked="" type="checkbox"/> | 09-Dec-2019 | 5500000289 | 00135516-01-0000 | 157 | <input type="text" value="157"/> |
| <input checked="" type="checkbox"/> | 23-Dec-2019 | 5500000289 | 00135516-01-0000 | 157 | <input type="text" value="157"/> |
| <input checked="" type="checkbox"/> | 30-Dec-2019 | 5500000289 | 00135516-01-0000 | 157 | <input type="text" value="157"/> |
| <input checked="" type="checkbox"/> | 06-Jan-2020 | 5500000289 | 00135516-01-0000 | 157 | <input type="text" value="157"/> |

[Continue](#) [Back](#)

Header View:

Fill in the header information. The required fields are marked:

Advanced Shipping Notice

| | | | |
|------------------------------|---|------------------------------|--|
| ASN Number: [*] | ASN000001197 | ASN Date: | 20-Feb-2019 10:19 PM |
| Shipping Information | | | |
| Ship Date: [*] | 20-Feb-2019 <input type="button" value="X"/> <input type="button" value="Calendar"/> 12:00 AM <input type="button" value="▼"/> <input style="width: 60px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="button" value="Select"/> | Deliver By: | 19-Feb-2019 <input type="button" value="X"/> <input type="button" value="Calendar"/> |
| Transportation: | --Select-- | Carrier Name: | Standard Carrier Alpha Code <input type="button" value="▼"/> |
| Weight: | Gross <input type="button" value="▼"/> <input style="width: 60px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="button" value="Select"/> | Bill Of Lading: [*] | <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text"/> <input style="width: 20px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="button" value="?"/> |
| Packing Slip #: [*] | <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text"/> | Shipper Id #: [*] | <input style="width: 150px; height: 20px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text"/> |
| Freight Terms: | --Select-- | | |

Line View:

At the item level you will again have the opportunity to edit the cumulatively quantity.

| Order Information | | | |
|--|---------------------------------|--|---|
| Schedule #: | 5500000289 | | |
| Sequence Number: | PlanningScheduleDate: 2/14/2019 | | |
| Line Items | | | |
| <input checked="" type="checkbox"/> Line | Item Number | Avail | Quantity |
| <input checked="" type="checkbox"/> 1 | 00135516-01-0000 | 33,127 | <input style="border: 2px solid green; border-radius: 5px; width: 40px; height: 20px;" type="text" value="1884"/> |
| Description: | | 5500000289 | |
| Buyer's Material #: | | 00135516-01-0000 | |
| | | <input type="button" value="Cancel"/> | <input type="button" value="Save as Incomplete"/> |
| | | <input style="background-color: #0070C0; color: white; border: 1px solid #0070C0; border-radius: 5px; width: 60px; height: 25px;" type="button" value="Send"/> | |

Once the ASN is complete, scroll to the bottom of the screen. There are three buttons:

 Cancel Save as Incomplete Send

Cancel

This will terminate the ASN. Nothing will be sent to Plastic Omnium Lighting.

Save as Incomplete

The ASN can be saved and continued later by clicking Save. The ASN will then be moved to the Saved folder under the blue ASN drop down for completion later and not sent to Plastic Omnium Lighting.

Send

If you agree to the quantities shown for each item simply click Send. The ASN is then sent to Plastic Omnium Lighting and stored in your Sent folder.

Once the Line Items are all reviewed, the Supplier can then Send the ASN.

This will create a structured document to be sent back to Plastic Omnium Lighting EDII / ERP system. Notification will be given that the Document has been successfully sent.



ASN is the last required document for Plastic Omnium Lighting.

Thank-you for reading. You are now ready to complete all the transactions needed to do business with Plastic Omnium Lighting on the IBM WebForms!