invensys

Controls

iGlass Supplier User Manual

December 2012

Plex Supplier Portal Process

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Pre-Logon Microsoft Internet Explorer Configuration

1. Open Microsoft Internet Explorer (IE), press ALT + H on your keyboard, select "About Internet Explorer" and record the version of IE that you are using.

2. Click on your PC Start button, right click "My Computer", select "Properties" and record your Microsoft Operating System. (if using Windows Vista or Windows 7, you will also need to record whether you are using 32-bit or 64-bit.)

3. Go to URL https://www.plexus-online.com/

4. Click on the [PC Setup] button and follow the instructions to configure your IE to use Plex.

5. Now Restart your PC.
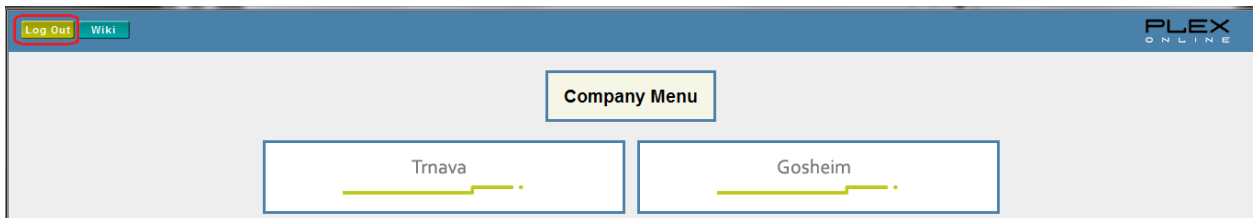
Important Notes:

– Plex only supports Microsoft IE (version 7.0 minimum).

– Non-IE browsers such as Firefox, Chrome, Opera, Safari and others are not supported.

Logon

1. Go to URL https://www.plexus-online.com/

2. Enter your User ID and Password as indicated below:

3. Press [Login] to enter Plex (your Customer(s) will be displayed, as below).

4. Select the Customer you wish to review, by clicking on the appropriate Invensys location.

5. To logout from Plex, select [Log Out] in the upper left corner of the screen.

Purchase Order Acknowledgement

- Select Online Releases

- Within the Search Panel, select PO Acknowledged "NO" to display all of your Orders that must be Acknowledged. (See area circled in red.)

- Click **Search**
  - Note: Orders must be viewed before they can be Acknowledged.

- Click on the PO No. (circled in red below) to view a printable version of the Order (Details on Releases are displayed on the right of the screen.)

△ Building ▽	P.O. Acknowledged and Accepted ✓	△ PO No ▽	PO Status	Supplier Code	△ Material Code or Part-Revision ▽	Supplier Part No	Planner	Description	Last Receipt Date	Last Receipt Quantity	Total Received	Release Note	Release Status	Quantity	Received Quantity	Balance
	☐	PO12345	Approved/On Order	DEF456	ABC1234		Name	Item Description	7-Jun-12	6,000 each	54,000 each		Forecast	6,000 each	0 each	6,000 each

- Check Order details (Quantity, Price and Dates). **Print** or **Email** a copy of the Order as required.
  - Note: Suppliers should contact their Invensys Buyer if any Order details are incorrect. The Invensys Buyer will arrange for the Order to be amended or Cancelled and recreated.

- Select the Order within the PO Acknowledged and Accepted column (circled in red to the right)

- Click on the **Acknowledge Selected** button to Acknowledge the Order.

- To view Acknowledged Orders, change PO Acknowledged to "YES" within Search Panel and Click **Search**.

- The Acknowledger name and the date/time of the acknowledgement, will be displayed in the PO Acknowledged and Accepted column of all Acknowledged Orders (circled in red to the right).

Purchase Order Release Acknowledgement

- Select Online Releases. Online Releases

- Within the Search Panel, select PO Acknowledged "YES".
- To view only Releases awaiting acknowledgement, select Release Acknowledged "NO".
- To only view "firm" Releases select Release Status "FIRM".
- To search for Releases which are due to be delivered with a certain date range (circled in blue), use "DUE DATE BEGIN" and "DUE DATE END" filters.

- Click Search.

  - Note: Orders must be Acknowledged before a Release can be Acknowledged.

- Scroll to the right of the screen and select the appropriate Release within the Release Acknowledge column (circled red below).

- Click on the **Acknowledge Selected** button to Acknowledge the Release.
  - Note: Suppliers who cannot achieve the "Delivery Due Date" for the Release can suggest an alternative within the Supplier Proposed Due Date field (circled green above), this is saved by clicking **Update**. When this date has been agreed with the Buyer the Due Date will change, and the supplier can continue with the Release Acknowledgement process.

  - Note: Suppliers can add Supplier Notes as appropriate (circled blue above) to provide more information about the Release to the Buyer / Planner.

- Within the Release Acknowledge column your Release Order will be displayed with a TICK, your name and the Date/Time of the Release Acknowledgement (circled in red below).

ASN and Label

- Select Online Releases.

- Within the Search Panel, select PO Acknowledged "YES" and Release Acknowledged "YES".

  - NOTE: Orders must be Acknowledged before a Release can be Acknowledged.

- Click **Search**.

- Select LABEL AND SHIP within the Online Labeling column (circled in red below).

- Within ADD INVENTORY, Plex requires suppliers to enter the following information (circled red):
  - Tracking No. (your Carriers Tracking reference).
  - Supplier Packing Slip No. (the Suppliers Delivery reference number).
  - Number of Containers (multiplied by the "Quantity per Container" equals the shipment quantity).

- Click **Add** to add to the Shipment.

- Plex will then display a message confirming the Container Reference (see below).

Container(s) TRN1375311 successfully added.

Note: Suppliers with a Zebra Label Printer can click **Print** to print your labels. The PRINT dialogue box will close automatically after the supplier labels print.

- Click **Done** to proceed to the Labeled Inventory – Ship screen.

- Change RECEIVED RANGE to "blank" and click **Search**.
  NOTE: Consignment Suppliers must tick DISPLAY CONSIGNMENT (circled in blue below)

Labeled Inventory - Ship				
Supplier:	Received Range: [▼]	Add Date: 19-May-2012 [ ] - 18-Jun-2012 [ ]
Part: [ ] 🔍	Heat: [ ] 🔍	Tracking No: [ ]
Building: [▼]	Sort: Heat [▼]	PO: [ ] 🔍
Status: [ ] 🔍	Serial No: [ ] 🔍 Supplier Packing Slip No: [ ]
☐ Display Consignment				**Search**

Select each Shipment with a TICK (circled red below) and press **Ship**.

Part/Matl	Description	Heat No	PO No	Supplier Name	Supplier Serial No	Supplier Packing Slip No	Tracking No	Serial No	Status	Containers	Quantity	Weight	Added	✓
MC9999	Item Desc 1111		PO1234	Supplier X		SPS1001	TN1001	TRN1375311	Supplier Labeled	1	500	0	Dove, Jason 18-Jun-12	☑
Heat Subtotal										1	500	0		
Material Subtotal										1	500	0		
Part SubTotal										1	500	0		
Receipt Total										1	500	0	Print Ticked Labels	

- Enter your Bill of Lading number and press **Submit**.

Question -- Webpage Dialog	✕
❓ Please enter the BOL Number	
[ ] Submit	

- Packing Labels are automatically generated, click **Print** or **Email** as required.
- The Labeled Inventory – Ship screen will now only show the remaining outstanding shipments.
- Click **◄ Back** to return to Online Releases.
- Within the Quantity Created column you will see the value of your Shipment(s), click on the value (circled red below) to view your Shipment(s).

Supplier Note	Quantity Created	Online Labeling
Test Notes	500	Label and Ship

- Shipment Status is displayed (circled red below).

Supplier Labeled Containers
Part No: MC89C192   PO No: 200200

Packing Slip No	Serial No	Quantity	Status
BOL1001 📄	TRN1375311	500	Supplier Shipped
	Totals:	500	

NOTE: From Online Releases click **Ship** to view any shipments that have been "labeled" but not "shipped"

Consignment Orders Overview

Plex accommodates two forms of Consignment Orders as follows:

Release Consignment Orders
- These orders are characterised as having Purchase Order Releases which must be acknowledged, in line with the Purchase Order Acknowledgement and Release Acknowledgement processes detailed previously in the manual.
- Consumption information is shown on the Supplier Consignment Consumption report below.
- MRP Forecast Demand is shown on the Supplier Planning Schedule (page 10).

Vendor Managed Min/Max Consignment Orders
- These orders are characterised as having agreed minimum and maximum levels, and Purchase Order Releases

NOTE: Purchase Order Releases do not need to be acknowledged.

- Consumption information is shown on the Supplier Consignment Consumption Report below.
- MRP Forecast Demand is shown on the Supplier Planning Schedule (page 10).
- Status of parts against minimum and maximum levels is provided by the Inventory Summary by Part (page 10).

Supplier Consignment Consumption Report

- Select the Supplier Consignment Consumption Report ![Supplier Consignment Consumption Report].
- Within the Search Pane,l select the appropriate Usage Date Range.

- Click **Search**.
- The status of your Consignment Items will be displayed (circled red below) as either OK or Consignment Accepted.
  "OK" = added to Invensys stock
  "Consignment Accepted" = included within the Consignment Area

Supplier	Part Number & Rev	PO Number	Serial Number	Quantity Received	Receipt Date	Shipper Number	Container Status	Active	Beginning Balance	Usage Date	Voucher No	Serial No Used	Quantity Used
Test Supp	379-01013-0	Cons00072	GOS003694	53000	6/28/2012 11:57:00 AM	take over	Consignment Accepted	✔	0				0.00
				0	6/28/2012 11:57:00 AM	take over	OK			0	7/2/2012	GOS-2013-04-0000000048	GOS005183	2,000.00
					6/28/2012 11:57:00 AM	take over	OK			0	7/2/2012	GOS-2013-04-0000000048	GOS005183	2,000.00
					6/28/2012 11:57:00 AM	take over	OK			0	7/3/2012	GOS-2013-04-0000000112	GOS005517	1,000.00
					6/28/2012 11:57:00 AM	take over	OK			0	7/3/2012	GOS-2013-04-0000000137	GOS005615	1,000.00
												Beginning Balance	0.00
												Total Received	53,000.00
												Total Used	6,000.00
												Consignment Balance	47,000.00

- Click on Purchase Order number (circled in blue above) to display PO details.

- Click on Serial Number (circled in red above) to display Inventory Container Details.

Supplier Planning Schedule

Suppliers can view MRP Forecast demand to assist with their planning. However, these are not Releases.

- Select Supplier Planning Schedule [Supplier Planning Schedule] .
- Within the Search Panel select criteria as appropriate.

- Click **Search**.
- Plex displays the Forecast demand per item.

Part No	Name	Supplier	Past Due	Week												
				2-Jul-12	9-Jul-12	16-Jul-12	23-Jul-12	30-Jul-12	6-Aug-12	13-Aug-12	20-Aug-12	27-Aug-12	3-Sep-12	10-Sep-12	17-Sep-12	24-Sep-12
Item #1234	ENERGY REGULATOR	Test Supp.	10.800	0	0	0	0	0	0	0	5.100	0	0	0	11.400	0

Inventory Summary by Part

Suppliers can view the status of their items in relation to the agreed minimum & maximum limits.

- Select Inventory Summary by Part [Inventory Summary by Part] .
- Within the Search Panel select STATUS = "Consignment Accepted" (circled in red below).
- Click **Search**.

- Plex displays the Forecast demand per item.

Part No	Revision	Description	No	Operation	Containers	Quantity	Weight	Minimum Inventory Quantity	Maximum Inventory Quantity
00102		ITEM DESCRIPTION	10	OPERATION	1	1,000	0	200	500
				Subtotal	1	1,000	0		
				Totals:	1	1,000	0		

Contact Management

NOTE: Suppliers must use this function to ensure their contact information is up to date.

- Select Contact Management [Contact Management] .

- Select a contact to view / amend details (circled in red below) or click **Add** to create a new entry.

Name	Title	Company Name	Office Phone	Category	Mobile Phone	Note	Groups
Surname, First name		Supplier X					👬

- Click **Update** to commit any amendments or new entries.

Payment Status

Suppliers can use this panel to view the status of their Invoices.

- Select Payment Status [Payment Status] .

- Within the Search Panel, suppliers must make specific searches such as Invoice Number, Purchase Order Number or Invoice Date Range.

Invoices Across Multiple Locations

Supplier:		Amount:	Group By: Currency/Status/Check
Invoice Date Range: Custom	Invoice Date Begin:		Invoice Date End:
Paid Date Range: Custom	Paid Date Begin:		Paid Date End:
Invoice No:	Check No:		PO No:

Search

- Click **Search**.

- Results are displayed grouped by Status (Fulfilled, On Hold or To Be Paid).

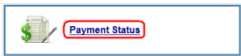| Part Information	Location Name	Status	PO No	Invoice No	Invoice Received	Invoice Date	Terms	Due Date	Paid Date	Discount Due Date	Discount	Amount	Currency Code	Payment Type	Payment No.	Clear Date	Doc	Email Address
🗐	TRN	Fulfilled	POxxx	INVxxx	Y	30-Mar-12	Net 120		25-Jul-12		0.00	1,477.72	EUR	Wire	COxxx		🖐	
🗐	TRN	Fulfilled	POxxx	INVxxx	Y	30-Mar-12	Net 120		25-Jul-12		0.00	723.38	EUR	Wire	COxxx		🖐	
					Fulfilled Subtotal							**0.00**						
🗐	TRN	Hold	POxxx	INVxxx	Y	02-Aug-12	Net 120	10-Jan-13			0.00	692.29	EUR				🖐	
🗐	TRN	Hold	POxxx	INVxxx	Y	02-Aug-12	Net 120	10-Jan-13			0.00	239.82	EUR				🖐	
					Hold Subtotal							**0.00**						
🗐	TRN	Pay	POxxx	INVxxx	N	27-Aug-12	Net 120	25-Dec-12			0.00	239.82	EUR				🖐	
					Pay Subtotal							**0.00**						

Receiving Report

Suppliers can use this Report to view parts Received by Invensys.

- Select Receiving Report [Receiving Report] .

- Within the Search Panel, suppliers must make specific searches such as Purchase Order Number, Receipt Date range or Part Number (circled in red below).

Note: The Result Sort sequence can be changed as required by clicking the SORT hyperlink (circled in blue below).

Purchasing Receipts

PO No:		Receipt Dates:	To	Item No:	
Description:		PO Type:		Part No:	
Supplier:		Sort:	PO No,Line Item No,Release No	Matl Code:	
Building:		Equipment ID:			Search

- Click **Search**.

- Results are displayed in the specified sequence, in line with the Search criteria.

PO Building	PO No	Supplier	Line Item No	Rel No	Invensys Plymouth Item Reference No	Description	Equipment ID	Order Qty	Due Date	Receive Qty	Receive Date	Unit Price	Total
	PO 123	TEST SUPPLIER #1	1	17	400 100 200			4,000	12-Nov-12	4,000	8-Nov-12	£ .21 / each	£ 854.56
	PO 124	TEST SUPPLIER #1	1	21	400 100 300			4,850	5-Nov-12	4,850	6-Nov-12	£ .05 /	£ 243.66
							Total:	8,850		8,850			£ 1,098.22

Weekly Online Releases

This Report summarises daily Releases in 8 weekly groups.

- Select Weekly Online Releases .

NOTE: All Releases will be displayed, but suppliers can refine the Search as necessary by entering specific criteria such as Purchase Order Number or Part number (circled in red below) within the Search panel.

Weekly Online Releases

Supplier:		Part No		
PO No		Item No	Supplier Part No	
Ship To		Order By:	PO No	Search

- Click **Search**.
- Results are displayed in the specified sequence, in line with the Search criteria.

| | | | | | | Weekly Releases | | | | | | | |
PO No	Part	Description	Last Receipt	Unit	Arrears	47 12-Nov-12	48 19-Nov-12	49 26-Nov-12	50 3-Dec-12	51 10-Dec-12	52 17-Dec-12	53 24-Dec-12	2 31-Dec-12
PO 500	500 100 122		9-Nov-12 0010035456		2000		2000 Firm	2000 Cancelled			2000 Firm	2000 Forecast	
PO 501	500 100 366		9-Nov-12 0010035456		2000		1000 Firm	2000 Cancelled			3000 Firm	2000 Forecast	

Inventory List

This Report details the status of every container, sorted by Part number.

- Select Inventory List .

Note: All Containers will be displayed, but suppliers can refine the Search as necessary by entering specific criteria such as Part number or Status (circled in red below) within the Search panel.

Inventory

Job No:	Serial No:	Part Type:	Heat No:
Building:	Part No:	Operation:	Status:
Location:	Operation Type:	Active: ☑	Sort Order: Part, Add Date
Supplier: BRAWO BRASS	Tracking No:		Search

- Click **Search**.
- Results are displayed in the specified SORT ORDER, in line with the Search criteria.

Op No	Operation	Serial No	Job	Heat	Tracking No	Quantity	Weight	Location	Container	Status	Add Date	Expiration Date	Note
					Part No: 400 111 222		Revision:		Part Name: Part Description #1				
10	Receive (ea)	PO 201				6	0	MValve2	Bin	OK	7-Sep-12		:
		PO 202				1,440	0	CONSIGN	Wood Pallet	Consignment Accepted	10-Oct-12		:
		PO 203				1,440	0	CONSIGN	Bin	Consignment Accepted	10-Oct-12		:

Supplier Kanban Manager

Through this facility suppliers can manage their Kanban parts (where applicable).

- Select Supplier Kanban Manager   .

Rack Details			Setup				Current Cards		
			Level		Cards		Current Cards		
Part No	Part Operation	Std Pack Size	Yellow	Red	Kanban	Build	Rack	Used	Note
Test BOM rev A	Receiving ea		0	4	7	10	0	4.85	5	

- To view the Kanban Rack for a specific Part click the number under Setup in the Cards Kanban column (circled in red above).
- To view the Kanban Rack as a graph, click the number in the Current Cards Rack column (circled in blue above).

Part Test BOM rev A - Receiving ea
Test Component Part for BOM

Kanban Rack

Current Inventory

	Serial No	Location	Quantity	Status	Updated
10	S000171	Test Press	15	OK	24-Oct-11 08:02
9	S000327	INTERPLANT BLDG2	50	OK	21-Oct-10 08:54
8	S002783	Test Assembly	50	OK	25-Nov-10 19:19
7	TST004244	FASSY03A	100	OK	10-Nov-11 05:28
6	TST004868	Receiving area	100	OK	2-May-12 10:39
5	TST004869	Receiving area	100	OK	2-May-12 10:39
	TST004870	Receiving area	100	OK	2-May-12 10:39
	7 containers in inventory				

Current Releases

Supplier	PO No	Due Date	Quantity	Cards	In Transit	Cards	Balance
Test	000096	3-Feb-11	100000	1000	5077	51	94923
		Total:	100000	1000	5077	51	94923

- Select a Date Range (circled in red below).

Kanban Card Graph

| Part: | Test BOM rev A | 🔍 | Start Date: | | 📅 | Range: | ▼ |
| Operation: | Receiving ea | 🔍 | End Date: | | 📅 | | Search |

- Click **Search** .

Supplier Documentation

All supplier documentation can be downloaded from this repository
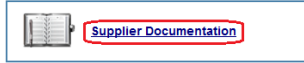
- Select Supplier Documentation Supplier Documentation
- Click on the required document or folder to download or open respectively (circled in red below).

Document Name	Doc ID	Note
Invensys Supply Chain Code of Conduct.pdf		
7.4.2-2 Global Supplier Handbook Revision E.pdf		
7 4 1-5 Supplier Profile and Self Assessment Rev H.xls		
ES-10633 Critical to Quality Procedure.pdf		
PPAP		
Restricted Material Compliance		

Useful Links

Plex

www.plexus-online.com

Supplier Presentations

Click here to download the Supplier Introduction to the Plex System.pdf (4.4mb)

Click here to download the PO Acknowledgement video.mp4 (4.3mb)

Click here to download the Release Acknowledgement video.mp4 (5.0mb)

Click here to download the ASN Label Ship video.mp4 (8.0mb)

Supplier Documentation

Click here to download the current iGlass Supplier User Manual.pdf (500k)

Click here to download the current iGlass Supplier FAQ.pdf (70k)

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