

Documents Pure Document management module

Document management on the **JAGGAER** supplier portal

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Terms and abbreviations

JD	Jaggaer Direct (formerly Pool4Tool)
POM	Purchase Order Management (module in Jaggaer)
RFQ	Request For Quotation (module in Jaggaer)
SRM	Supplier Relationship Management (module in Jaggaer)

1 General information

Please note that the English version is considered the master document.

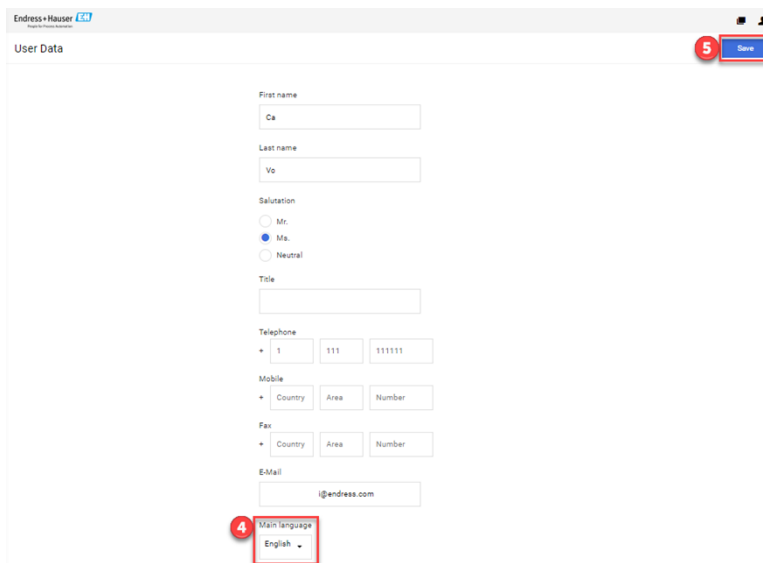
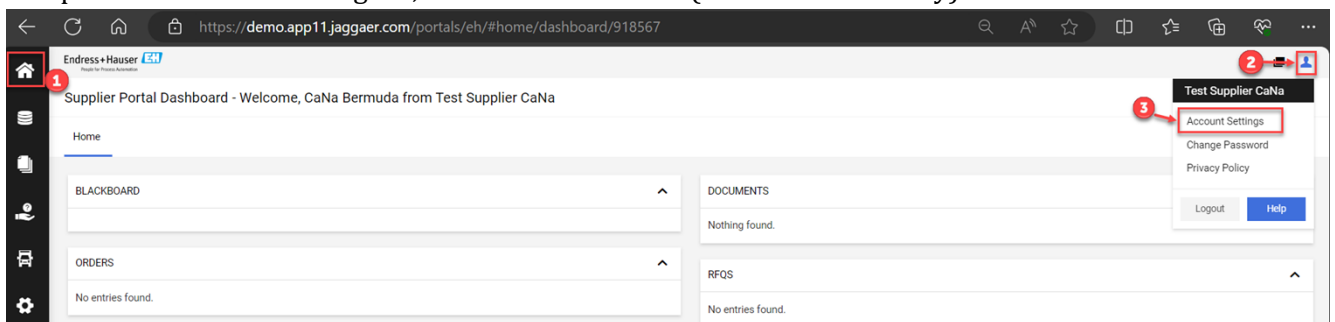
2 Endress+Hauser supplier portal

Endress+Hauser uses the Jaggaer digital supplier portal for collaboration with its suppliers in the fields of supplier relationship management (SRM module), automatic purchase order management (POM module), requests for quotations (RFQ module), document management (Documents Pure module) and much more.

Link to platform:

<https://app11.jaggaer.com/portal/eh>

The portal is available in English, German and Chinese (main functions only).



☞ Please note that the document generally refers to one document (i.e. singular). However, several documents and suppliers can be included in a campaign.

3 Documents Pure module

Documents Pure facilitates document management between you and Endress+Hauser.

The module includes the exchange, storage and updating of documents. Using Documents Pure means we can provide you with an easier way to handle document management. At the Endress+Hauser Group, we use the functions “Exchange”, “Confirmation” and “Request”.

☒ Document campaigns are always initiated by Endress+Hauser. As a supplier, you have no option to initiate a campaign.

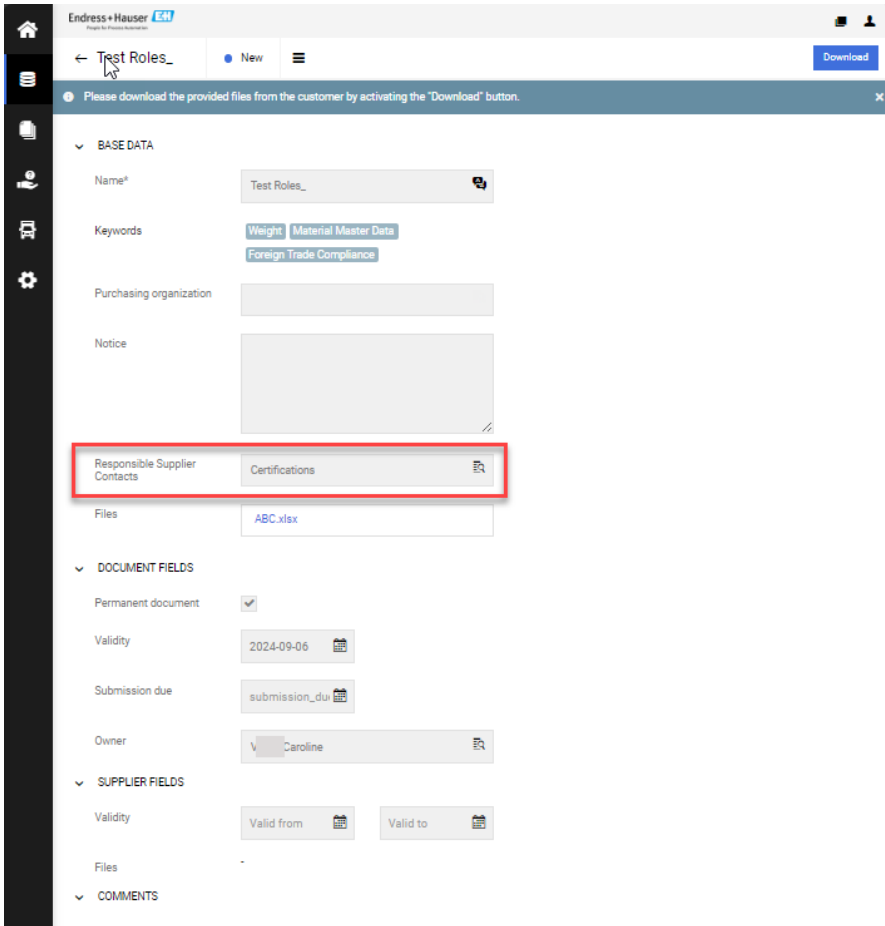
3.1 Prerequisite for using the module

The prerequisite for using the Documents Pure module is full registration for Jaggaer SRM. If you do not have access to the Endress+Hauser supplier portal, please get in touch with your Endress+Hauser contact.

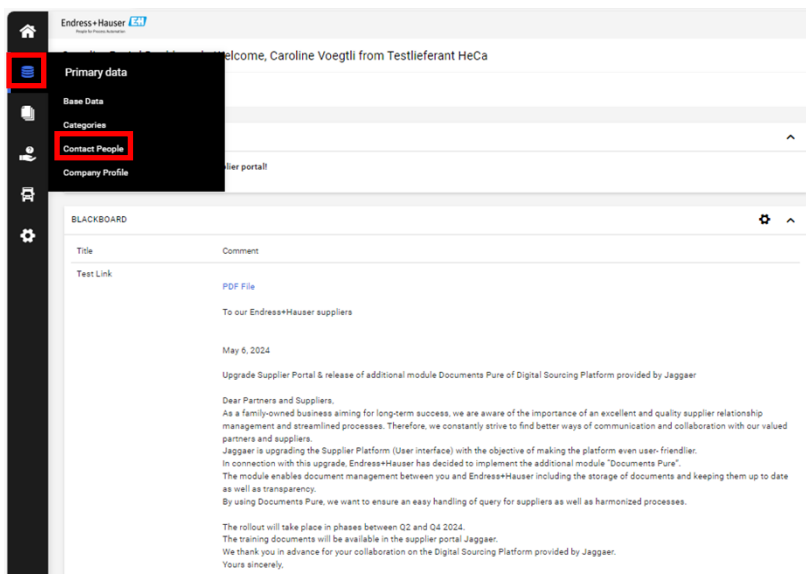
3.2 Role management

In order to assign a role to a person, the person in question must have access to the Endress+Hauser supplier portal. Maintenance of roles is described in the “SRM supplier management module” training document.

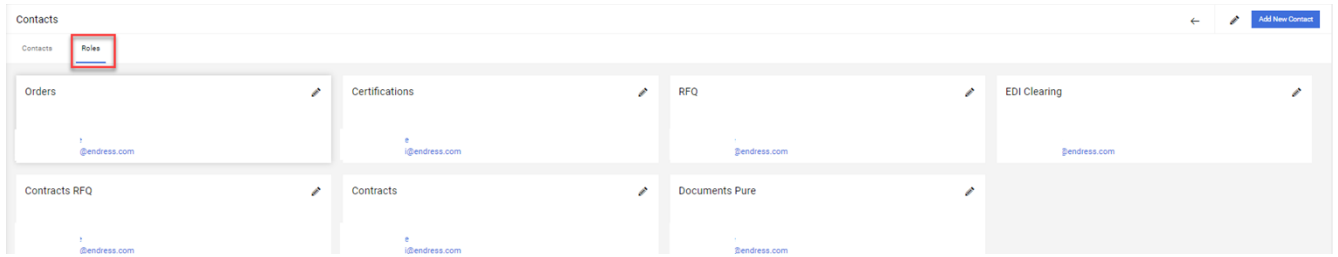
Role management is important for the editing authorization of the campaign. For a campaign, Endress+Hauser can define which role or which persons on supplier side can edit it. The role can be found in the campaign under “Responsible Supplier Contacts”.



Several people can be assigned to one role. The role assignment is visible in Jaggaer. Click on the “Primary Data” icon and select “Contact People”.



Click on roles at the top of the bar to see the role distribution.

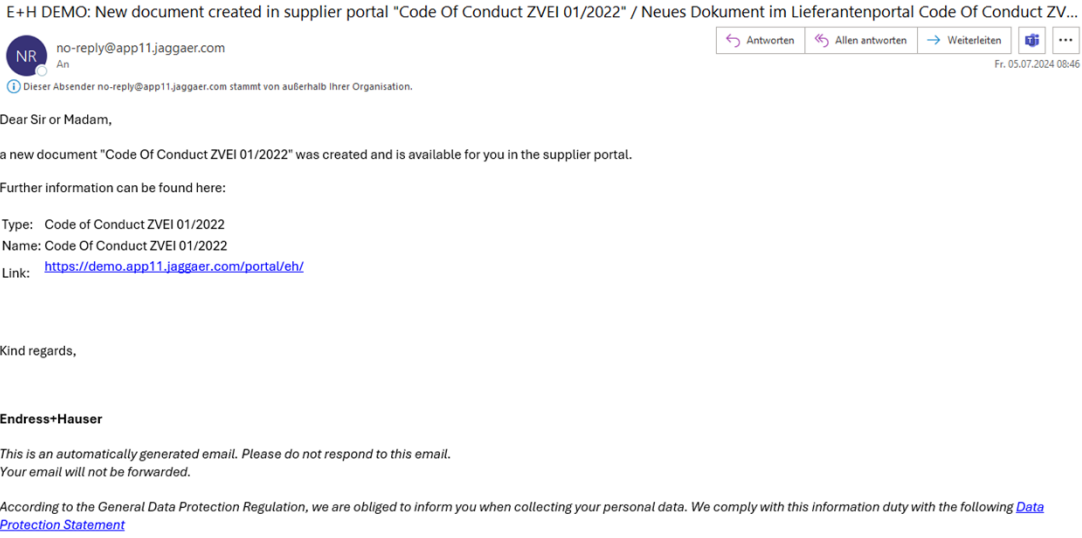


The roles can also be changed during a campaign if another person in the company is to work on it.

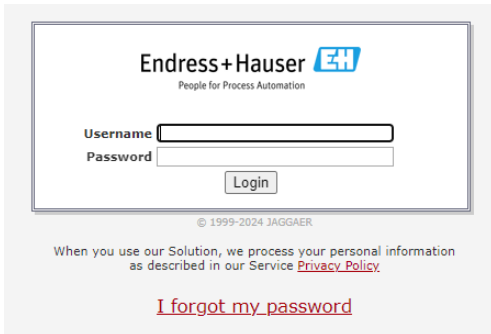
4 Using the Documents Pure module

4.1 Document campaign and registration

If Endress+Hauser has started a document campaign, you will receive an e-mail requesting further processing.



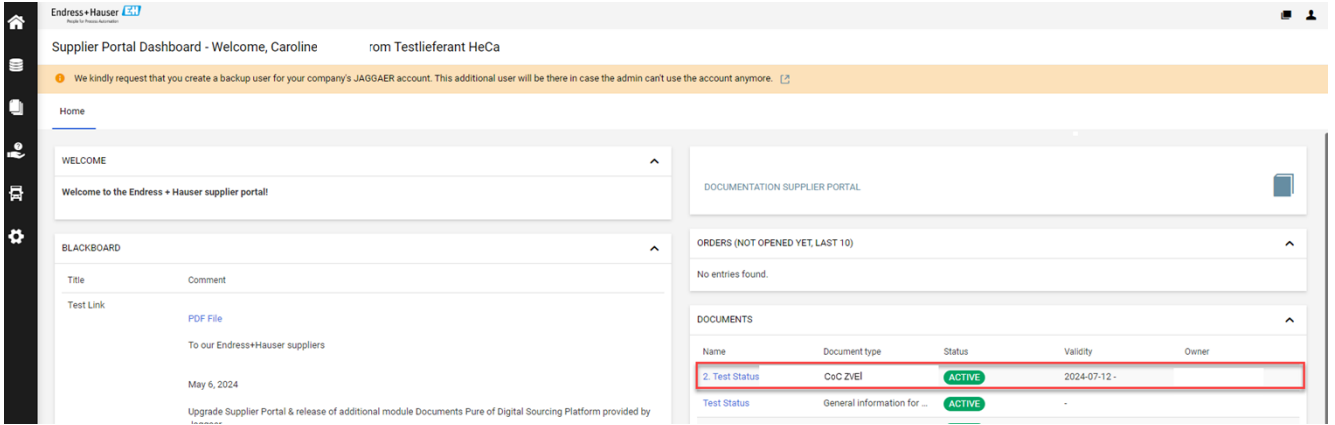
To enable further processing of the document campaign, you must click on the link provided in the e-mail.



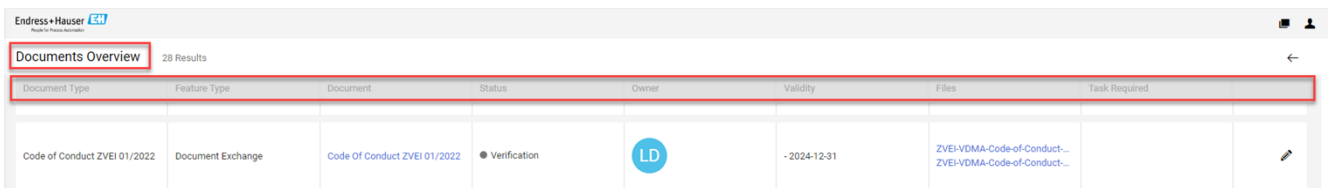
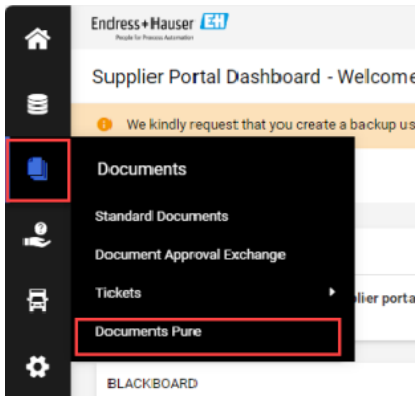
Once you have logged into the portal, you will see your dashboard.

4.2 Supplier portal dashboard

All documents assigned to your company are listed in your supplier portal dashboard:



Alternatively, you can access the Documents Pure module and then the overview of all documents via the navigation bar on the left-hand side (Documents → Documents Pure). Here, you will be able to see all documents and information assigned to you by Endress+Hauser.



The following areas are available in the overview:


Field	Description
Document type	The name of the document type is displayed here. This can be any kind of agreement, contract, certificate or other contractual amendment. The document type is named individually by Endress+Hauser. Therefore, no specific name can be added here.
Feature type	Each document (see “Document type” above) is assigned one of the available feature types. Endress+Hauser uses four feature types: Exchange, confirmation, request and multi documents. A detailed explanation of these feature types is provided later in this manual.
Document	The document name is displayed here.
Status	The document status is displayed. This can be “New”, “Active”, “Verification”, “Valid”, “Downloaded”, “Accepted”, “Update”, and “Expired”.
Owner	The Endress+Hauser owner/author of the campaign is specified here.
Validity	Every campaign either has a validity period or is permanently valid and does not expire. This information is displayed in this field.
Files	The attached files are listed here and can be opened directly.
Action required	Any tasks assigned to you will be displayed in this field. Only the standard document is for information only and requires no action from you. All other feature types must at least be uploaded or downloaded.

Regardless of which path you choose, you can now access and process campaigns via the link in the e-mail or via the navigation bar on the left. In each case, click on the document to start active editing. The information, fields and data to be displayed or edited depend on the respective feature type.

Endress+Hauser uses the following feature types:

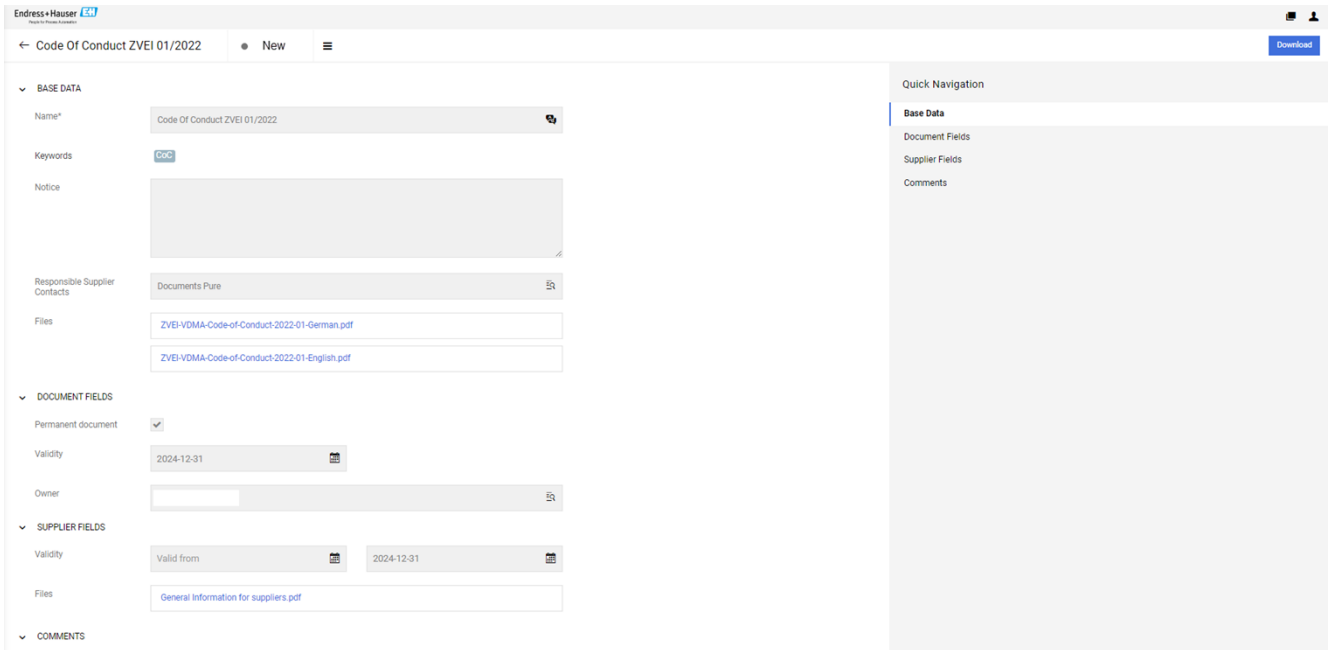
- Exchange
- Request
- Confirmation
- Multi Documents

The use of the different feature types is explained in the following chapters.

 The displayed fields can differ in different campaigns.

4.3 Exchange feature type

In this case, the Endress+Hauser purchaser expects an exchange of documents, i.e. Endress+Hauser provides you with a document that you download for editing and then upload back into the portal. The purchaser can decline your document or ask questions after the document has been updated.




The screenshot displays the 'Code Of Conduct ZVEI 01/2022' document entry in the Endress+Hauser portal. The interface includes a breadcrumb trail, a 'New' button, and a 'Download' button. The document is categorized under 'BASE DATA' and includes the following fields:

- Name:** Code Of Conduct ZVEI 01/2022
- Keywords:** DOC
- Notice:** (Empty text area)
- Responsible Supplier Contacts:** Documents Pure
- Files:**
 - ZVEI-VDMA-Code-of-Conduct-2022-01-German.pdf
 - ZVEI-VDMA-Code-of-Conduct-2022-01-English.pdf
- DOCUMENT FIELDS:**
 - Permanent document:**
 - Validity:** 2024-12-31
 - Owner:** (Empty text field)
- SUPPLIER FIELDS:**
 - Validity:** Valid from 2024-12-31
 - Files:** General Information for suppliers.pdf
- COMMENTS:** (Empty section)

A 'Quick Navigation' sidebar on the right lists: Base Data, Document Fields, Supplier Fields, and Comments.

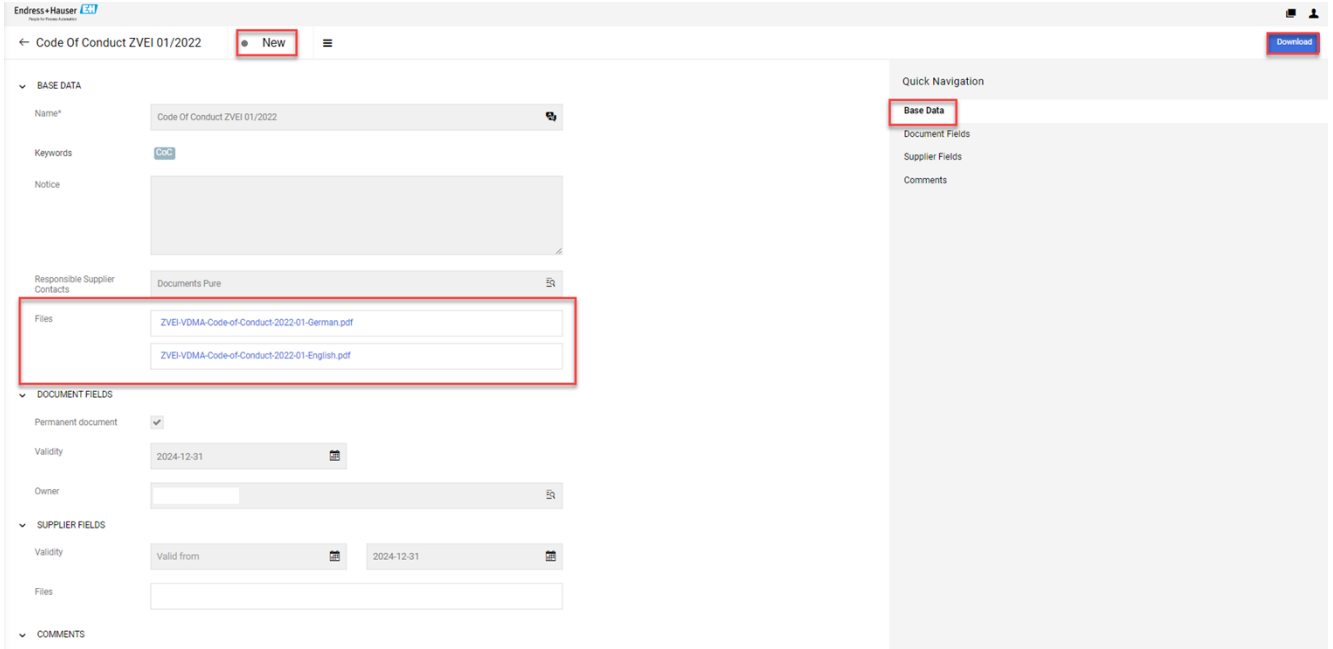
Various fields are available for the Exchange feature type. The fields that are displayed for you depend on the respective campaign and can vary. Some fields are not intended for editing. They are for information only.

Base data, document fields and supplier fields

Field	Description
Name	The name of the selected document is displayed. This information can be displayed in different languages, if provided by Endress+Hauser.  Click on the speech bubble symbol to view the document name in other languages.
Notice	The purchaser can leave a message for you.
Responsible Supplier Contact	For each campaign, Endress+Hauser determines the role to which the campaign is assigned on the supplier side. You can check the role assignment in your company in the SRM manual, chapter x and adjust if necessary. If you have received a campaign and want to delegate it internally for processing, you may need to allocate the role specified to your colleague.
Files	All files attached by Endress+Hauser purchasing are displayed in this field.
Permanent document	If the campaign is permanently valid and therefore does not expire, the Endress+Hauser purchaser sets the checkmark here, which is then displayed to you.
(Document) validity	If the campaign is not permanently valid, the validity period from-to is displayed in these fields. After the validity date has expired, the document status changes to "Expired".
(Supplier) validity	Document validity at the supplier end

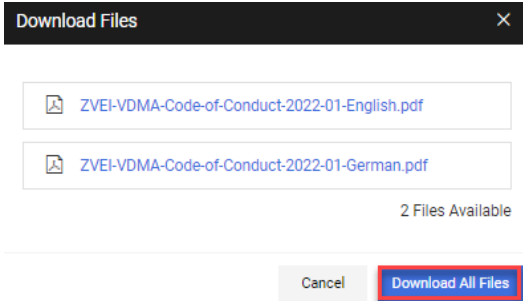
4.3.1 Edit document

Now click on the “Download” button at the top right of the toolbar to start editing.

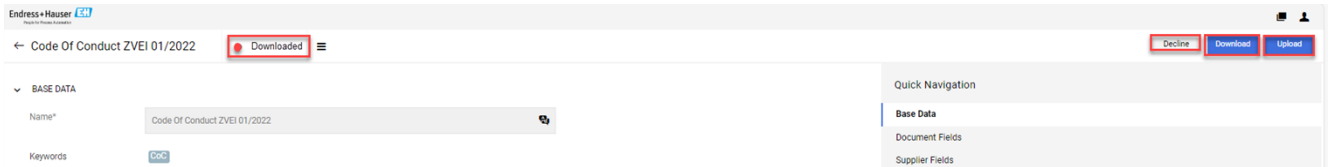


It is not possible to edit the documents directly in the “Files” field. The documents here are read-only.

To download all files, click on the “Download all files” field. Select the document and download for further editing in your local file structure.

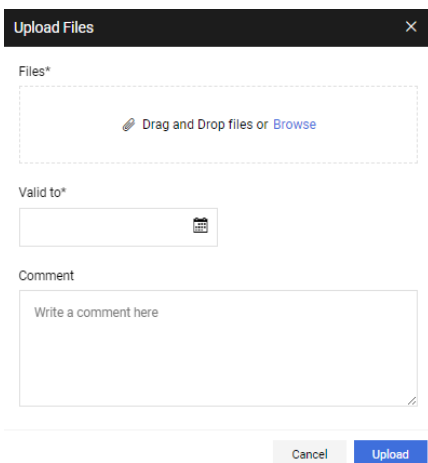


As soon as you have downloaded the attached files, the document status changes from “New” to “Downloaded”. Additional options now appear in the toolbar. To save the document on the Jaggaer portal, use the “Upload” button.

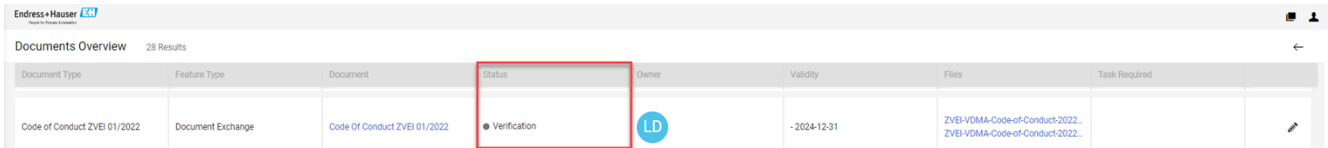


During the upload process, you can leave a message in the form of a comment for the Endress+Hauser purchaser. The “Validity*” field, unlike the “Comment” field, is a required field and the expiry date of the document must be entered. You determine for how long the document is valid.

Confirm your upload with the “Upload” button:



As soon as you have uploaded the document, the document status changes from “Upload” to “Verification”. The Endress+Hauser purchaser must now check your document and confirm it. Only then is it released.



Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
Code of Conduct ZVEI 01/2022	Document Exchange	Code Of Conduct ZVEI 01/2022	Verification	LD	- 2024-12-31	ZVEI-VDMA-Code-of-Conduct-2022... ZVEI-VDMA-Code-of-Conduct-2022...	

You will receive an e-mail notification as soon as your Endress+Hauser purchaser has confirmed your document:

Von: no-reply@app11.jaggaer.com <no-reply@app11.jaggaer.com>
Gesendet: Mittwoch, 10. Juli 2024 09:16
An
Betreff: E+H DEMO: Document Request "Code of Conduct ZVEI 01/202" finished

Dear Sir or Madam,

The document "Code of Conduct ZVEI 01/2022 Accept" was accepted.

Type: Code of Conduct ZVEI 01/202
 Name: Code of Conduct ZVEI 01/2022 Accept
 Link: <https://demo.app11.jaggaer.com/documents#document/general/39264>

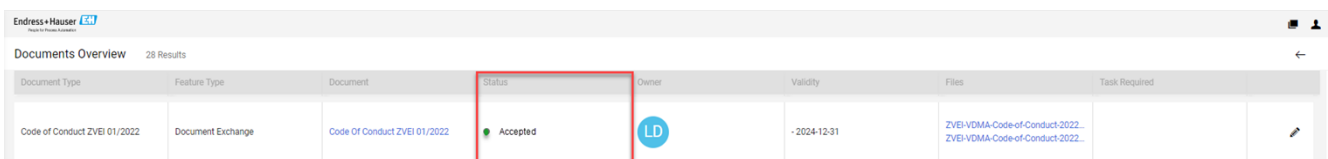
Kind regards,

Endress+Hauser

*This is an automatically generated email. Please do not respond to this email.
 Your email will not be forwarded.*

According to the General Data Protection Regulation, we are obliged to inform you when collecting your personal data. We comply with this information duty with the following [Data Protection Statement](#)

If the document is accepted, the request is automatically closed and no further action is required at your end. The document status changes from “Verification” to “Accepted”.




Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
Code of Conduct ZVEI 01/2022	Document Exchange	Code Of Conduct ZVEI 01/2022	Accepted	LD	- 2024-12-31	ZVEI-VDMA-Code-of-Conduct-2022... ZVEI-VDMA-Code-of-Conduct-2022...	

4.3.2 Change/update document

If your Endress+Hauser purchaser requests a change/update to your document, you will receive a notification and the document status will change from “Verification” to “Update”.

E+H DEMO: Document :: Open Task has been assigned to you

 no-reply@app11.jaggaer.com
An

 Dieser Absender no-reply@app11.jaggaer.com stammt von außerhalb Ihrer Organisation.

 Nachricht übersetzen in: Deutsch | Nie übersetzen aus: Englisch | [Übersetzungseinstellungen](#)

[← Antworten](#) [↶ Allen antworten](#) [→ Weiterleiten](#)  

Mi, 17.07.2024 08:24

Dear Sir or Madam,

The document "Code Of Conduct ZVEI 01/2022" with validity date was updated and a task was assigned to you. Please find more details about the document here:

Type: Code of Conduct ZVEI 01/2022

Name: Code Of Conduct ZVEI 01/2022


Link: <https://demo.app11.jaggaer.com/portal/eh/>

Kind regards,

Endress+Hauser

*This is an automatically generated email. Please do not respond to this email.
Your email will not be forwarded.*

According to the General Data Protection Regulation, we are obliged to inform you when collecting your personal data. We comply with this information duty with the following [Data Protection Statement](#)

Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
Code of Conduct ZVEI 01/2022	Document Exchange	Code Of Conduct ZVEI 01/2022	Update		-	ZVEI-VDMA-Code-of-Conduct-2022... ZVEI-VDMA-Code-of-Conduct-2022...	Yes

The confirmation process starts from the beginning again. Now open the document again and check whether the purchaser has left you a message or explanation in the “Notice” field. Correct your document accordingly and upload it again.

← Code Of Conduct ZVEI 01/2022
Update

Decline Download Upload

Please upload the requested files with a validity date by activating the "Upload" button or decline the exchange by activating the "Decline" button.

BASE DATA

Name*

Keywords

Notice

Responsible Supplier Contacts

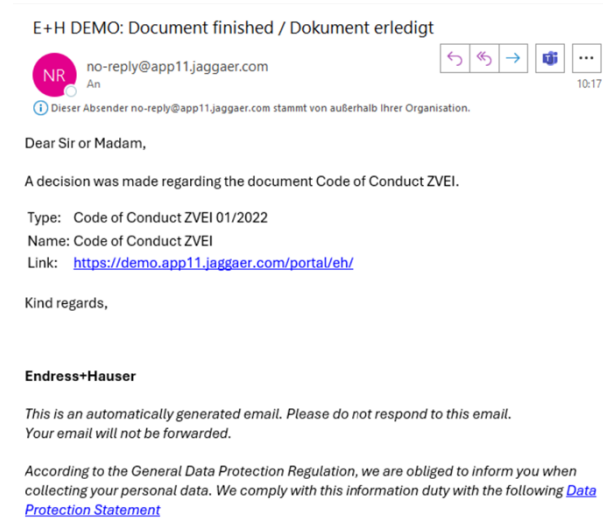
Quick Navigation

- Base Data
- Document Fields
- Supplier Fields
- Comments

As soon as the purchaser has accepted and confirmed your document, the status will change to “Accepted” and the request will be closed automatically.

4.3.3 Decline document

If Endress+Hauser declines your document, you will receive an e-mail informing you that the document has been declined.



An overview of the document type status is provided in the supplier portal dashboard:

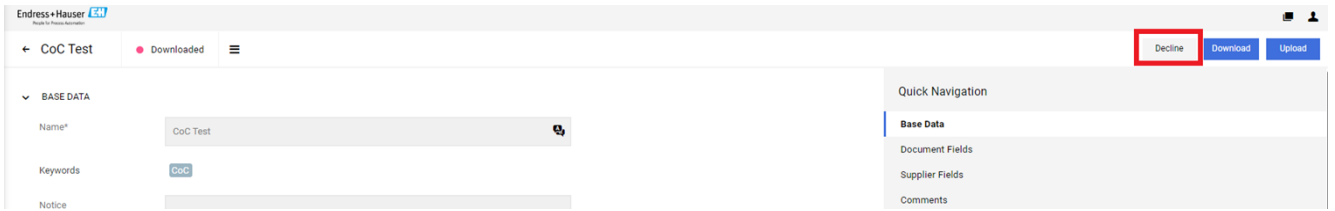
Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
Code of Conduct ZVEI 01/2022	Document Exchange	Code Of Conduct ZVEI 01/2022	Declined	LD	-	ZVEI-VDMA-Code-of-Conduct-2022- ZVEI-VDMA-Code-of-Conduct-2022...	

The exact reason for the rejection is provided in the “Comments” field:

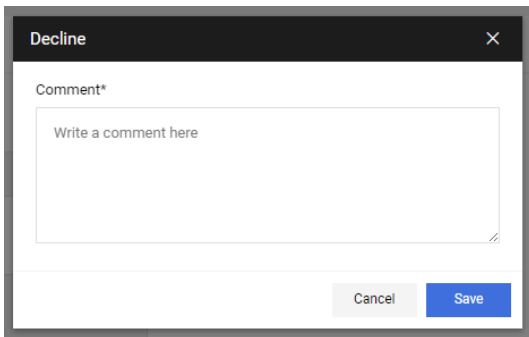
The screenshot shows the details for the document 'Code Of Conduct ZVEI 01/2022', which is marked as 'Declined'. The 'COMMENTS' section contains the following entry:

Wrong file 2024-07-17 08:30

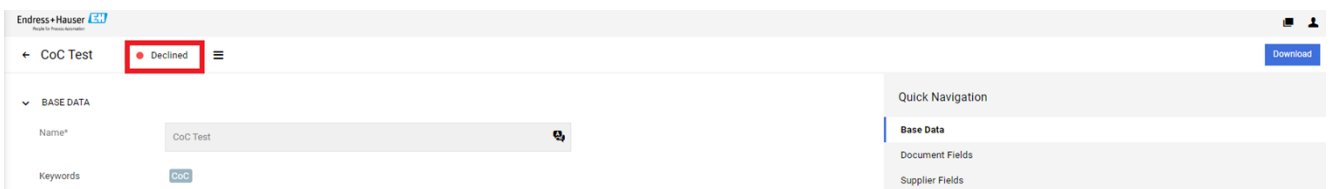
As a supplier, you too can decline the document exchange. To do this, click on “Decline”.



An input field will then be displayed, in which you must explain why you do not accept the document. This is a required field.



As soon as you click on “Save”, Endress+Hauser will receive an e-mail notifying them that you have declined. The status in the Jaggaer portal changes from “Downloaded” to “Declined”.

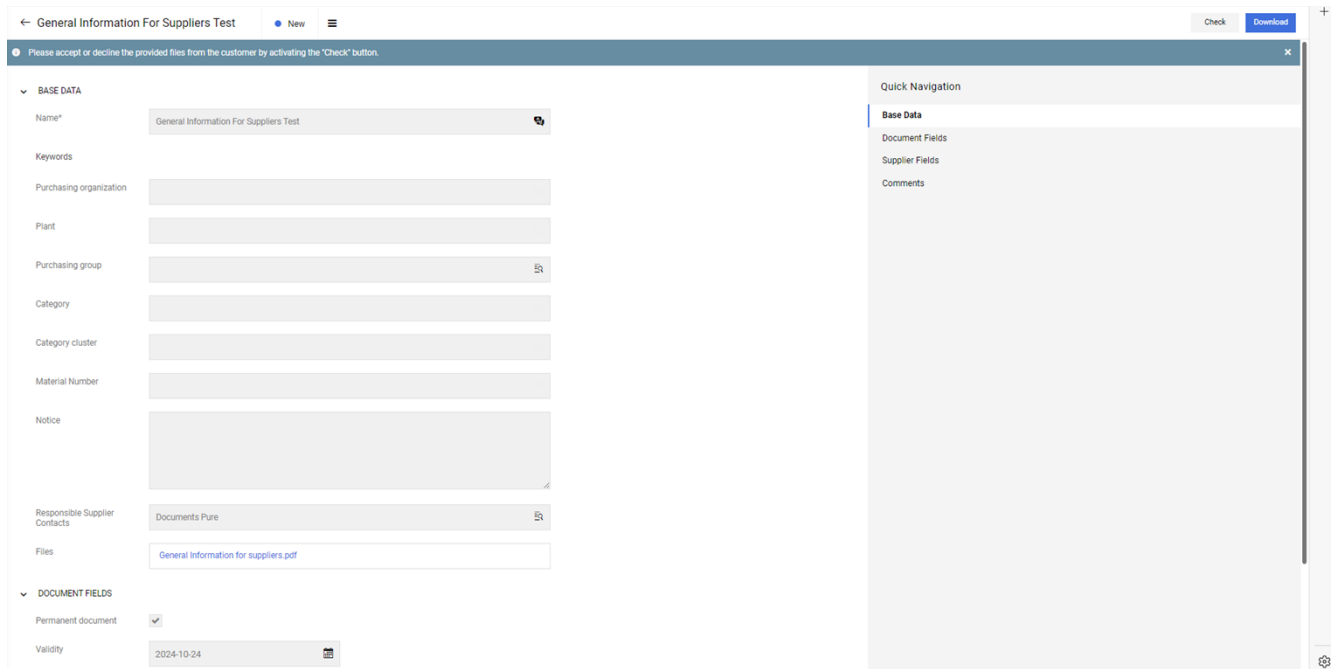


⚠ Please note, if you decline the request, the request process will automatically close and no further editing will be possible.


4.4 Confirmation feature type

The Confirmation feature type is used to confirm documents. For document confirmation, Endress+Hauser sends one or more documents to you for confirmation.

Click on the document name to start editing the document campaign. The editing screen then opens:



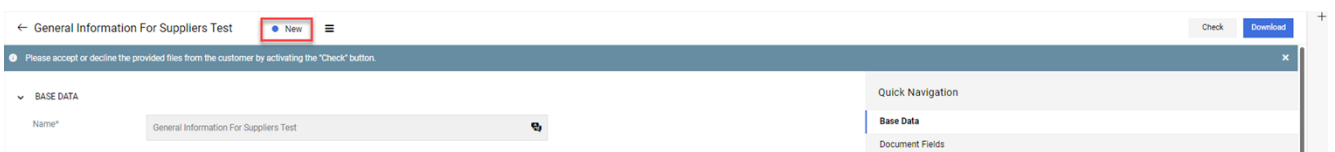
Various fields are displayed in the overview for the Confirmation feature type. The fields that are displayed for you depend on the respective campaign and can vary. Some fields are not intended for editing. They are for information only.

Field	Description
Name	The name of the selected document is displayed. This information can be displayed in different languages, provided Endress+Hauser has saved different languages.  Click on the speech bubble symbol to view the document name in other languages.
Keywords	Endress+Hauser-specific standard template for feature type
User-defined ID	This field is not activated at Endress+Hauser.
Purchasing organization	The documents can be assigned to purchasing organizations, after which they are valid for these organizations.
Plant	The documents can be assigned to different Endress+Hauser plants. They are then valid for the respective specified plant(s)

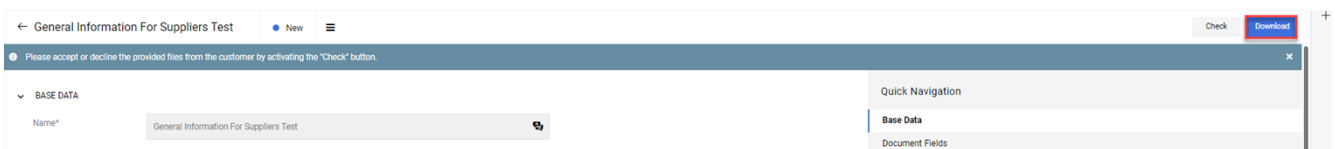
Field	Description
Purchaser group	The documents can be assigned to Endress+Hauser purchaser groups. They are then valid for these purchaser groups
Category	The campaign can relate to individual product groups of Endress+Hauser
Product group clusters	The campaign relates to one or more Endress+Hauser product group clusters
Comment	The purchaser can leave a message for you.
Responsible supplier contacts	Role in the Jaggaer portal for the Documents Pure module. The maintenance of roles is described in the training document for Jaggaer registration.
Files	All files attached by Endress+Hauser Purchasing are displayed in this field.
Permanent document	If the campaign is permanently valid and therefore does not expire, the Endress+Hauser purchaser sets the checkmark here, which is then displayed to you.
(Document) validity	If the campaign is not permanently valid, the validity period from-to is displayed in these fields. After the validity date has expired, the document status changes to "Expired".
(Supplier) validity	Document validity at the supplier end

4.4.1 Edit document

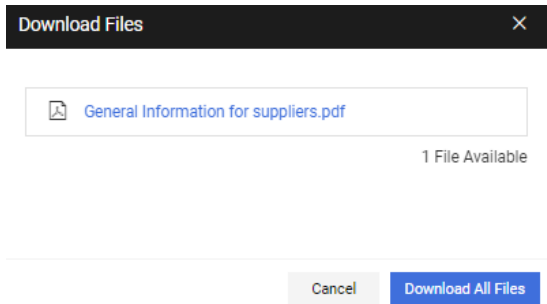
The status in the header indicates the editing status of the opened document. The documents sent by Endress+Hauser, which you have not yet edited, have the initial status "New".



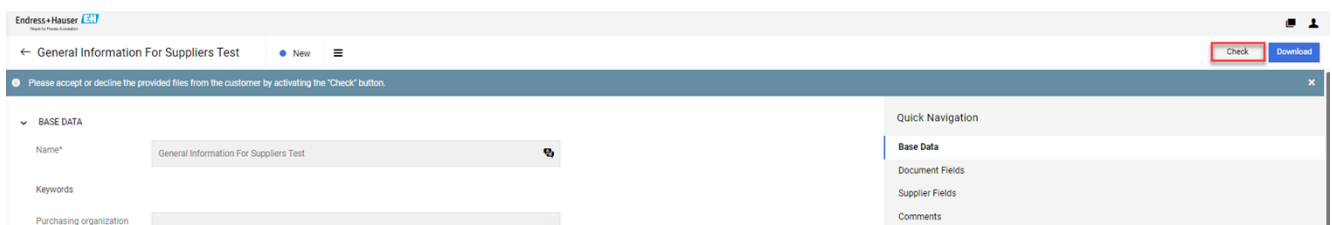
Now click on the "Download" button in the top right of the toolbar to start editing.



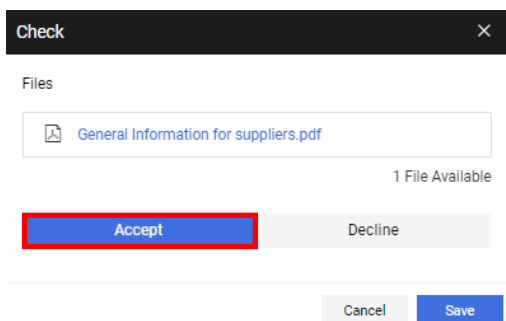
To download all files, click on the “Download all files” field. Select the document and download for further editing in your local file structure.



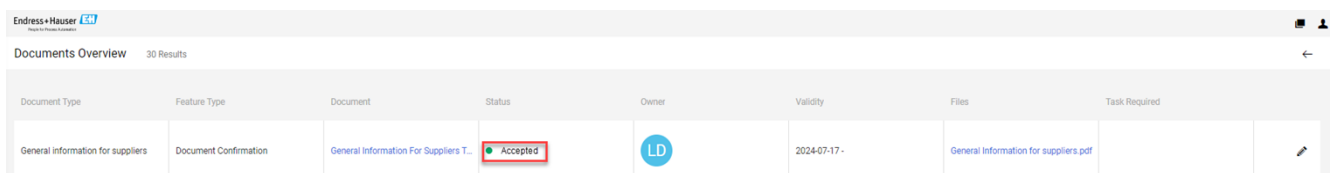
After you have checked the document, the document must be confirmed via the “Check” function.



After clicking on this button, a further window opens. Confirm with “Accept” and “Save”.

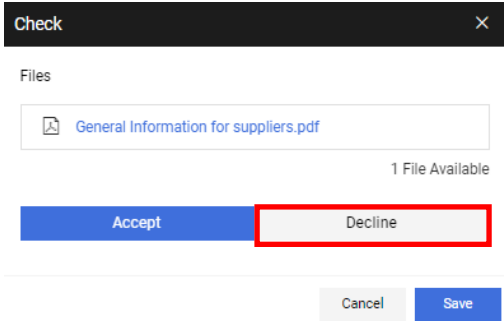


As soon as you have done this, the status of the request changes from “New” to “Accepted”. At the same time, the owner of the request (Endress+Hauser purchaser) receives an e-mail informing them that you have confirmed the document. The request is now complete.



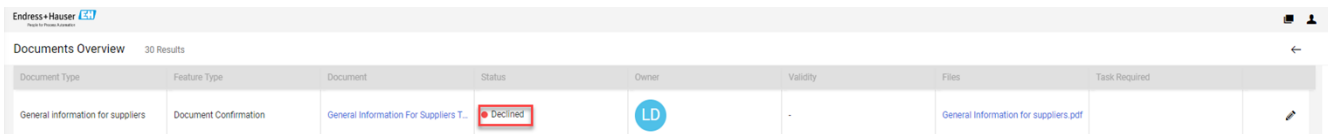
4.4.2 Decline document

You can also decline the document confirmation campaign. To do this, click on “Decline”.



In the “Comment” input field, you must explain why you do not accept the document. This is a required field.

As soon as you click on “Save”, Endress+Hauser receives an e-mail notifying them that you have declined. The status in the Jaggaer portal changes from “New” to “Declined”.



The screenshot shows a 'Documents Overview' table with 30 results. The table has columns for Document Type, Feature Type, Document, Status, Owner, Validity, Files, and Task Required. The first row shows a document with the following details:

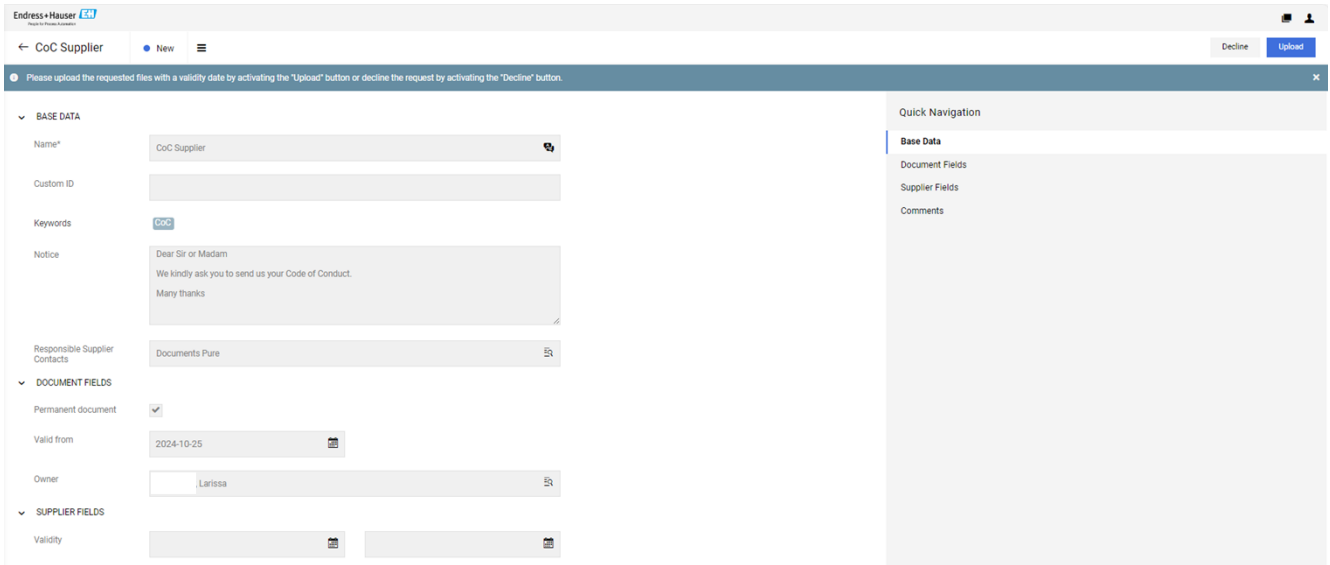
Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
General information for suppliers	Document Confirmation	General Information For Suppliers T...	Declined	LD	-	General Information for suppliers.pdf	

⚠ Please note, if you decline the request, the request process will automatically close and no further editing will be possible.


4.5 Request feature type

The Request feature type is used to request documents. Endress+Hauser requests one or more documents from you. After you have provided the document, you can return the document to Endress+Hauser via the Documents Pure module.

Click on the document name to start editing the document campaign. The editing screen then opens:



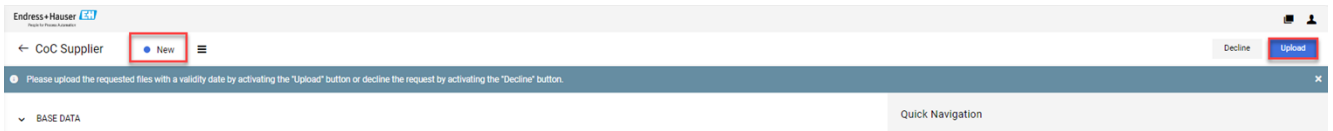
Various fields are available for the “Request” feature type. The fields that are displayed for you depend on the respective campaign and can vary. Some fields are not intended for editing. They are for information only.

Field	Description
Name	The name of the selected document is displayed. This information can be displayed in different languages, provided Endress+Hauser has saved different languages.  Click on the speech bubble symbol to view the document name in other languages.
Comment	The purchaser can leave a message for you.
Permanent document	If the campaign is permanently valid and therefore does not expire, the Endress+Hauser purchaser sets the checkmark here, which is then displayed to you.
(Document) validity	If the campaign is not permanently valid, the validity period from-to is displayed in these fields. After the validity date has expired, the document status changes to “Expired”.
(Supplier) validity	Document validity at the supplier end

4.5.1 Edit document

The header at the top indicates the editing status of the opened document. The document sent by Endress+Hauser, which you have not yet edited, have the initial status “New”.


Use the “Upload” function to upload one or more documents.




After you have provided your document, you can save it on the Jaggaer Documents Pure platform using the “Upload” function. During the upload process it is possible to add notes. The “Validity*” field, unlike the “Comment” field, is a required field and must be completed with the validity date of the document.

Dateien hochladen ✕

Dateien*

 Dateien hier ablegen oder [Hochladen](#)

Gültig bis*

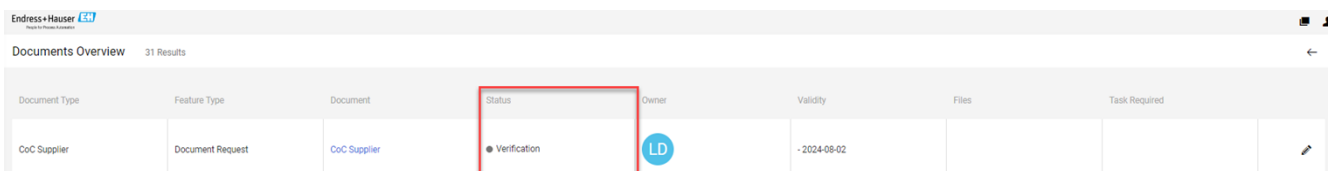


Bemerkung

Schreiben Sie hier einen Kommentar

Abbrechen
Hochladen


As soon as you have uploaded the document, the document request status changes from “Upload” to “Verification”. Only after the status change process is the uploaded document available for verification. At the same time, an e-mail is sent to the owner of the request (responsible Endress+Hauser purchaser) with information that you have edited the requested document and they can now be verified.



Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
CoC Supplier	Document Request	CoC Supplier	Verification	LD	- 2024-08-02		

Once the verification process is complete, you will receive feedback from the Jaggaer portal in the form of an e-mail notifying you whether the document have been accepted or declined or if an update is required.

E+H DEMO: Document Request "CoC Supplier" finished

 no-reply@app11.jaggaer.com
An Larissa

Dieser Absender no-reply@app11.jaggaer.com stammt von außerhalb Ihrer Organisation.

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Mi, 17.07.2024 09:59

Dear Sir or Madam,

The document "CoC Supplier" was processed.

Type: CoC Supplier
Name: CoC Supplier
Link: <https://demo.app11.jaggaer.com/documents#document/general/39322>

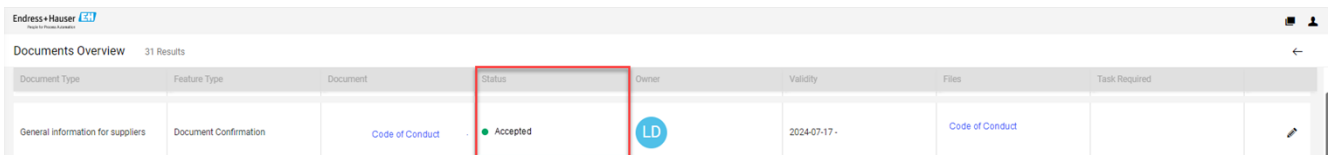
Kind regards,

Endress+Hauser

This is an automatically generated email. Please do not respond to this email.
Your email will not be forwarded.

According to the General Data Protection Regulation, we are obliged to inform you when collecting your personal data. We comply with this information duty with the following [Data Protection Statement](#)

If the document is accepted, the request is automatically closed and no further action is required at your end. The document status changes from "Verification" to "Accepted".




Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
General information for suppliers	Document Confirmation	Code of Conduct	Accepted	LD	2024-07-17	Code of Conduct	

4.5.2 Change/update document

Endress+Hauser can also request an update to the document you have sent. You will receive a notification by e-mail.

E+H DEMO: Document :: Open Task has been assigned to you

 no-reply@app11.jaggaer.com
An

Dieser Absender no-reply@app11.jaggaer.com stammt von außerhalb Ihrer Organisation.

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Mi, 17.07.2024 09:46

Dear Sir or Madam,

The document "CoC Supplier" with validity date was updated and a task was assigned to you. Please find more details about the document here:

Type: CoC Supplier
Name: CoC Supplier
Link: <https://demo.app11.jaggaer.com/portal/eh/>

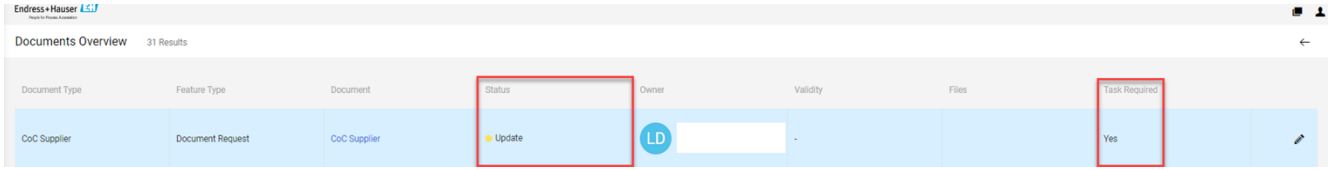
Kind regards,

Endress+Hauser

This is an automatically generated email. Please do not respond to this email.
Your email will not be forwarded.

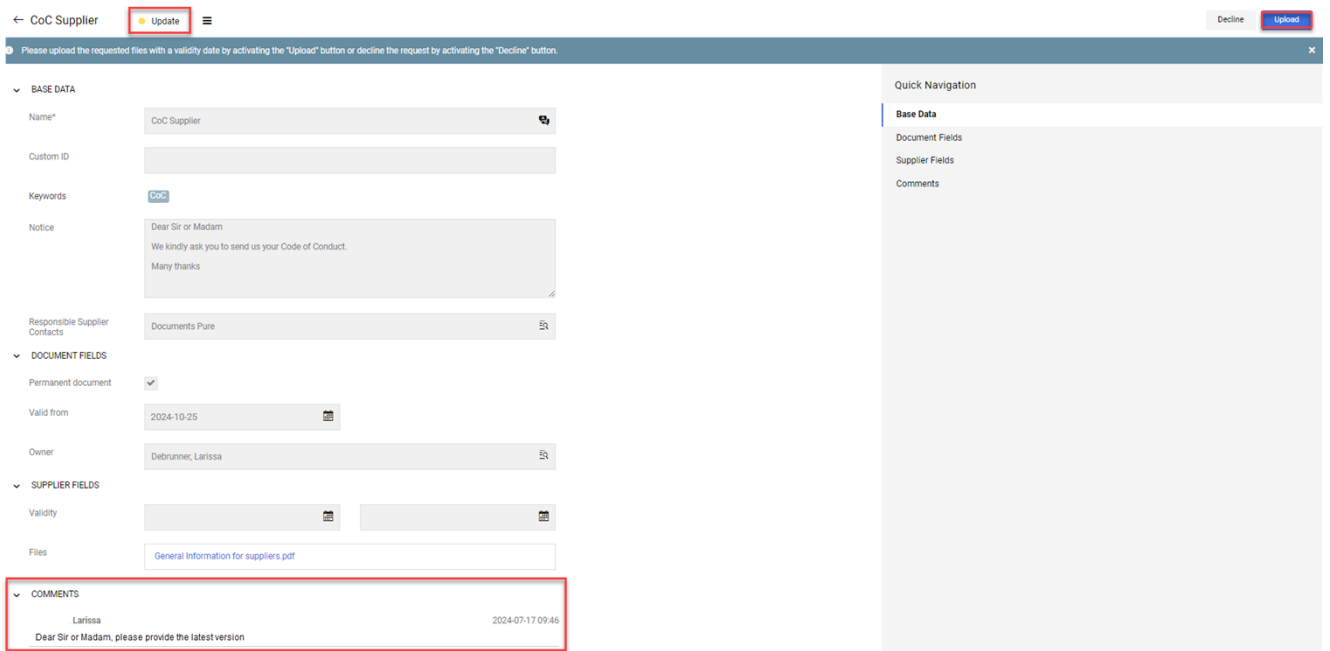
According to the General Data Protection Regulation, we are obliged to inform you when collecting your personal data. We comply with this information duty with the following [Data Protection Statement](#)

The status of the document request also changes from "Verification" to "Update" and the need for action is displayed.



Document Type	Feature Type	Document	Status	Owner	Validity	Files	Task Required
CoC Supplier	Document Request	CoC Supplier	Update	LD	-		Yes

Click on the document name to start updating the document request. The editing screen then opens:



← CoC Supplier Update Decline Upload

Please upload the requested files with a validity date by activating the "Upload" button or decline the request by activating the "Decline" button.

BASE DATA

Name* CoC Supplier

Custom ID

Keywords DOC

Notice Dear Sir or Madam
We kindly ask you to send us your Code of Conduct.
Many thanks

Responsible Supplier Contacts Documents Pure

DOCUMENT FIELDS

Permanent document

Valid from 2024-10-25

Owner Debrunner, Larissa

SUPPLIER FIELDS

Validity

Files General Information for suppliers.pdf

COMMENTS

Larissa 2024-07-17 09:46
Dear Sir or Madam, please provide the latest version

Quick Navigation


- Base Data
- Document Fields
- Supplier Fields
- Comments

In the "Comments" field, you can see the reason why Endress+Hauser is asking you for an update. For example, if you are asked to update document here, proceed with the upload in the same way as described in the previous sections.

4.5.3 Decline document

If declined, you will receive a notification by e-mail.

E+H DEMO: Document :: Open Task has been assigned to you

 no-reply@app11.jaggaer.com
An

ⓘ Dieser Absender no-reply@app11.jaggaer.com stammt von außerhalb Ihrer Organisation.

[🌐 Nachricht übersetzen in: Deutsch](#) | [Nie übersetzen aus: Englisch](#) | [Übersetzungseinstellungen](#)

Dear Sir or Madam,

The document "CoC Supplier" with validity date was updated and a task was assigned to you.
Please find more details about the document here:

Type: CoC Supplier
Name: CoC Supplier
Link: <https://demo.app11.jaggaer.com/portaleh/>

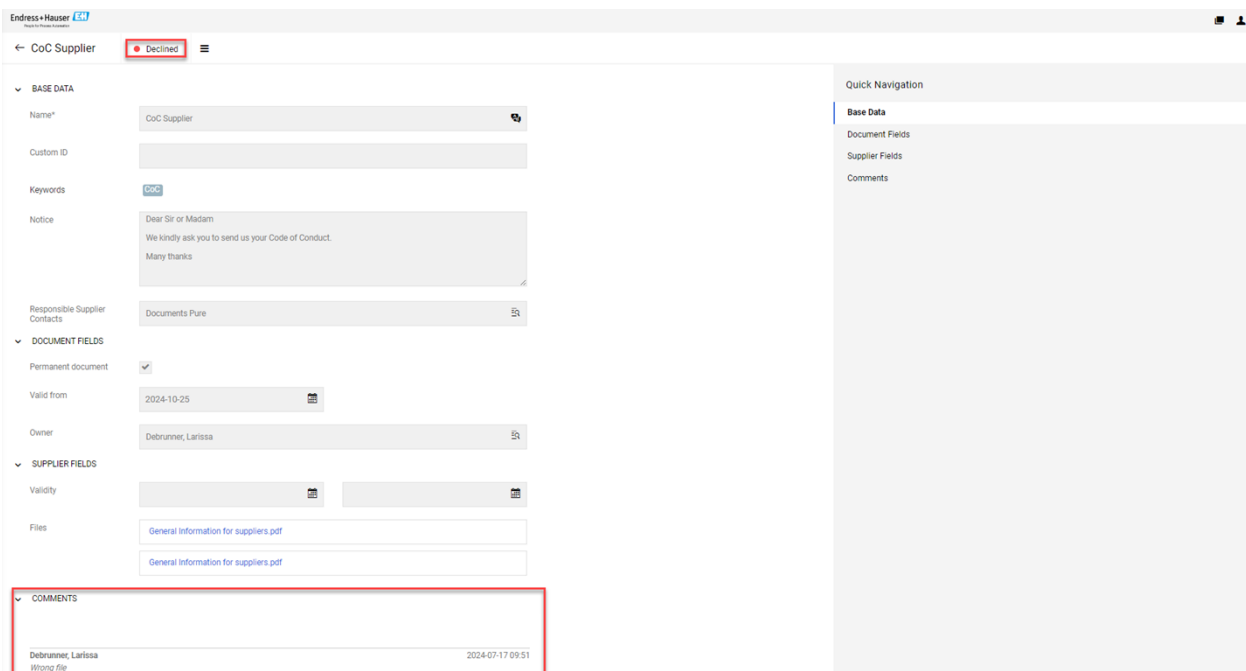
Kind regards,


Endress+Hauser

*This is an automatically generated email. Please do not respond to this email.
Your email will not be forwarded.*

According to the General Data Protection Regulation, we are obliged to inform you when collecting your personal data. We comply with this information duty with the following [Data Protection Statement](#)

The status of the document request changes from "Verification" to "Declined". In the "Comments" field, you can see the reason why Endress+Hauser declined the request. Further editing is not possible. The process is closed.



Endress+Hauser 

← CoC Supplier Declined

BASE DATA

Name* CoC Supplier

Custom ID

Keywords CoC

Notice Dear Sir or Madam
We kindly ask you to send us your Code of Conduct.
Many thanks

Responsible Supplier Contacts Documents Pure

DOCUMENT FIELDS

Permanent document

Valid from 2024-10-25

Owner Debrunner, Larissa

SUPPLIER FIELDS

Validity

Files
General Information for suppliers.pdf
General Information for suppliers.pdf

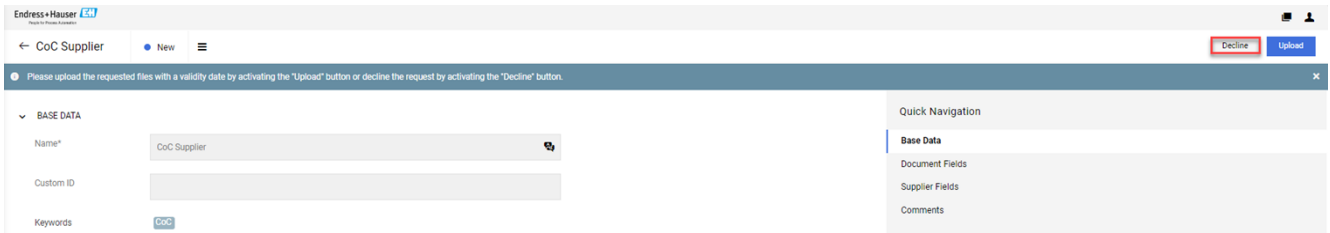
COMMENTS

Debrunner, Larissa 2024-07-17 09:51
Wrong file

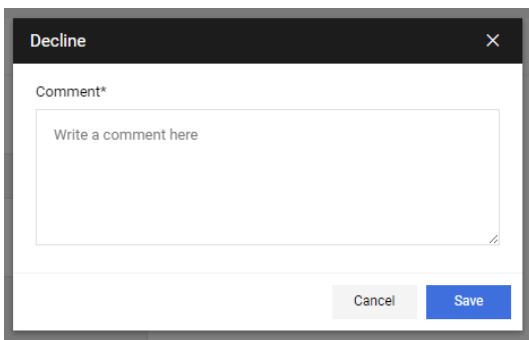
Quick Navigation

- Base Data
- Document Fields
- Supplier Fields
- Comments

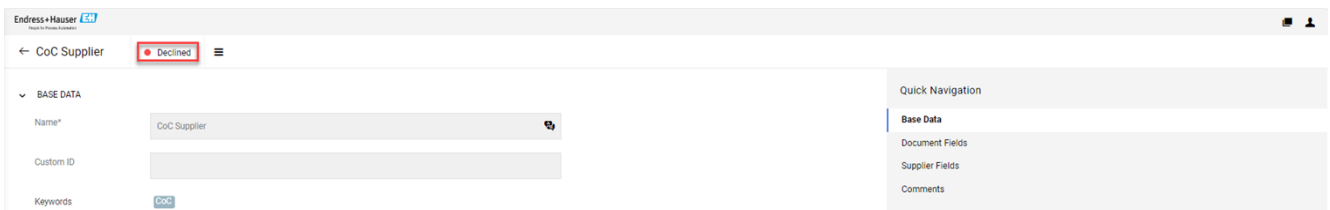
You can decline the requested document of the campaign. To do this, click on “Decline”.



An input field will then be displayed, in which you must explain in more detail why you do not accept the document. This is a required field.



As soon as you click on “Save”, Endress+Hauser receives an e-mail notifying them that you have declined. The status in the Jaggaer portal changes from “New” to “Declined”.

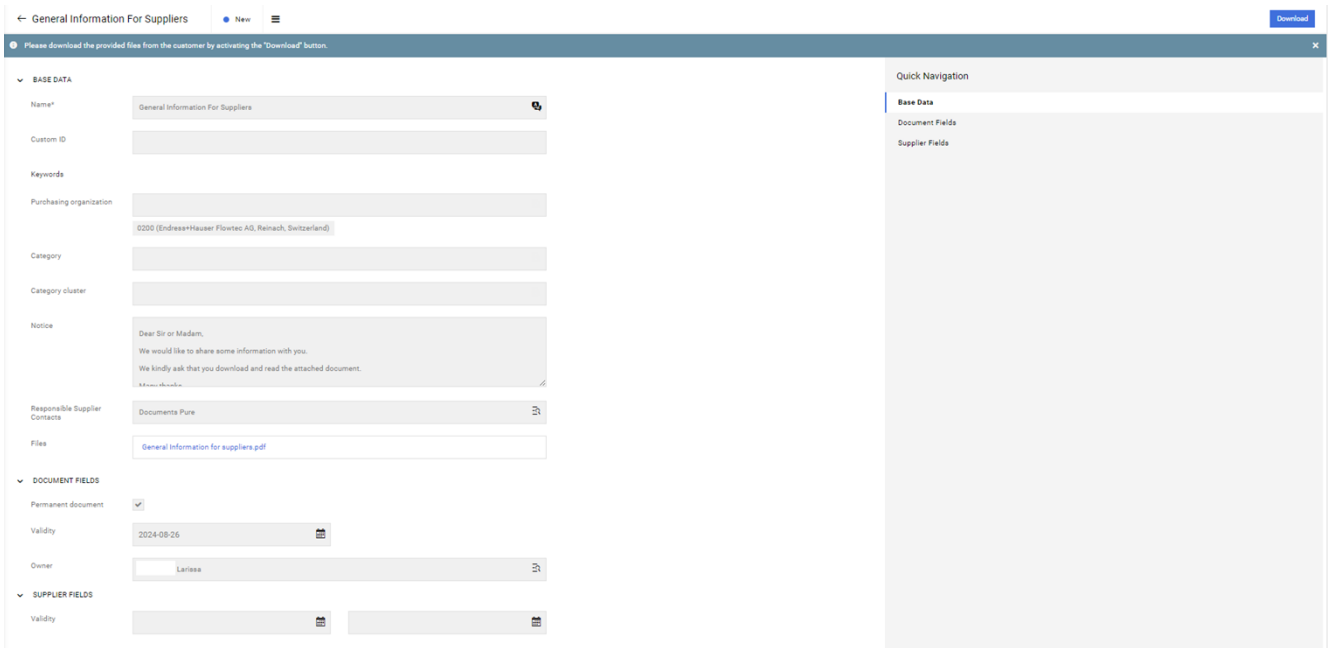


⚠ Please note, if you decline the request, the request process will automatically close and no further editing will be possible.

4.6 Multi Documents feature type

The Multi Documents feature type is used to send you a document only for information. The campaign is successfully completed as soon as you have downloaded the document. In contrast to the feature type Confirmation, you do not have to confirm the document.

Click on the document name to start editing the document campaign. The editing screen then opens:




The screenshot shows a web application interface for editing a document campaign. The main area is titled 'General Information For Suppliers' and contains several sections:

- BASE DATA:** Includes fields for Name (General Information For Suppliers), Custom ID, Keywords, Purchasing organization (0200 Endress+Hauser Flowtec AG, Reinach, Switzerland), Category, Category cluster, Notice (Dear Sir or Madam, We would like to share some information with you. We kindly ask that you download and read the attached document.), Responsible Supplier Contacts (Documents Pure), and Files (General information for suppliers.pdf).
- DOCUMENT FIELDS:** Includes a checkbox for Permanent document, a date field for Validity (2024-08-26), and an Owner field (Larissa).
- SUPPLIER FIELDS:** Includes a date field for Validity.

A 'Quick Navigation' sidebar on the right lists 'Base Data', 'Document Fields', and 'Supplier Fields'.

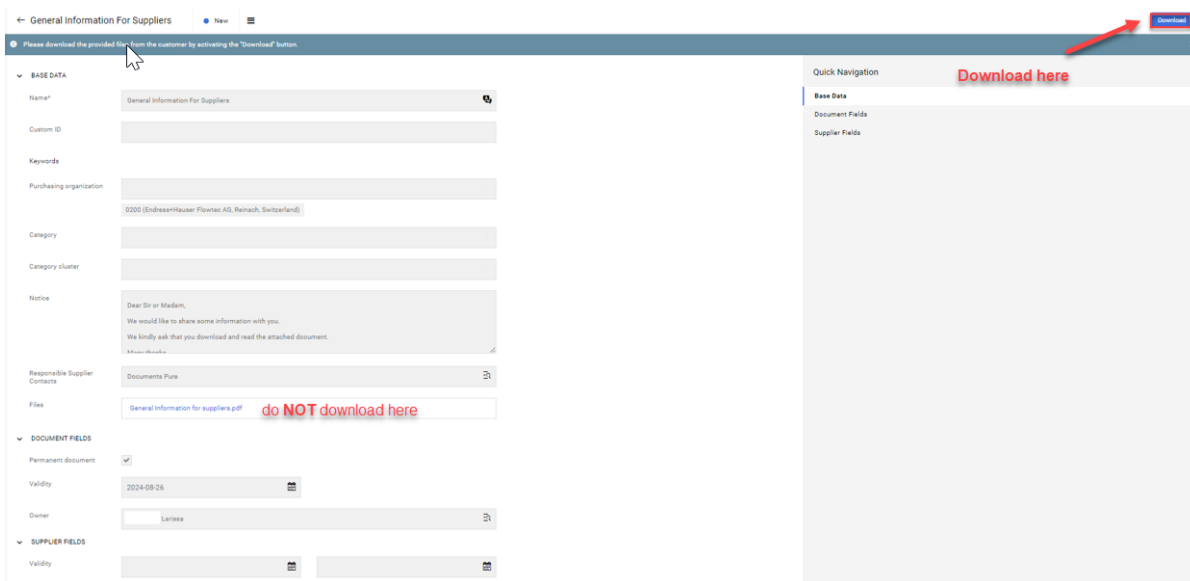
Various fields are available for the “Multi Documents” feature type. The fields that are displayed for you depend on the respective campaign and can vary. Some fields are not intended for editing. They are for information only.

Field	Description
Name	The name of the selected document is displayed. This information can be displayed in different languages, provided Endress+Hauser has saved different languages.  Click on the speech bubble symbol to view the document name in other languages.
Keywords	Endress+Hauser-specific standard template for feature type
Purchasing organization	The documents can be assigned to purchasing organizations, after which they are valid for these organizations.
Category	The campaign can relate to individual product groups of Endress+Hauser
Category clusters	The campaign relates to one or more Endress+Hauser category clusters
Notice	The purchaser can leave a message for you.
Responsible supplier contacts	Role in the Jaggaer portal for the Documents Pure module. The maintenance of roles is described in the training document for Jaggaer registration.
Files	All files attached by Endress+Hauser Purchasing are displayed in this field.


Field	Description
Permanent document	If the campaign is permanently valid and therefore does not expire, the Endress+Hauser purchaser sets the checkmark here, which is then displayed to you.
(Document) validity	If the campaign is not permanently valid, the validity period from-to is displayed in these fields. After the validity date has expired, the document status changes to “Expired”.
(Supplier) validity	Document validity at the supplier end

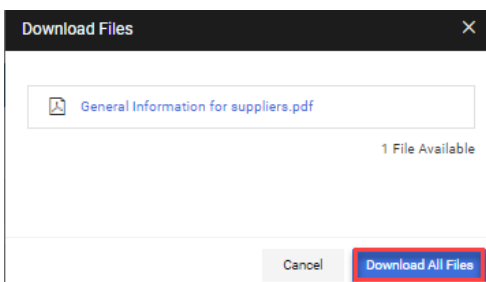
4.6.1 Edit document

In this feature type, the only thing you must do to complete this campaign is download the document. Click on the “Download” button.



Click on “Download All Files”


 Attention, do not open the document under “Files”.



The Endress+Hauser purchaser gets a notification email. The status changes from “New” to “Downloaded”.

← General Information For Suppliers Downloaded ☰

▼ **BASE DATA**

Name* 

Custom ID

Keywords

Purchasing organization

Category

Category cluster


Notice

Dear Sir or Madam,

We would like to share some information with you.

We kindly ask that you download and read the attached document.


Many thanks,


Responsible Supplier Contacts 

Files



▼ **DOCUMENT FIELDS**

Permanent document

Validity 

Owner 

▼ **SUPPLIER FIELDS**

Validity  

No further actions are required. The campaign is completed.