

- Document Management



## Document Management Training Document



- Document Management

# Training document: Structure & Overview

What is it?	
This document will guide users through general information and specific topics and serves as a handbook for further functionalities by using “Use Cases” as guidance.	
What is a Use Case?	
A use case illustrates possible functionalities and provides step-by-step guidance.	
How are Use Cases structured?	
Use Cases include one slide with main information as overview, followed by a detailed click guide.	
Use Case Overview	Overview of the use case content including description, content, notes, and screenshot
Headline	A brief introduction to the use case
System View	Shows screenshots for the related step
Click Guide	Detailed guidance through the functionalities
Note	Relevant information to the use case

### Example for: Structure, Use Cases and Click Guide

• POM – Purchase Order Management

#### New Purchase Order Arrived for Suppliers Without Portal Access

Use Case Overview

##### Overview

Dear Mr. Huber,

Your order is available for you in the Knorr-Bremse supplier portal.

Order number: 4567890123

Please confirm the order soon.

Link: [https://www.knorr-bremse.com/portal/order/4567890123](#)

Customer: 4567890123

Reference: 4567890123

Please confirm the order soon.

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

##### Use Case Description

The supplier received an email about a new order but has no access to the supplier portal.

• Login to view order

##### Purchase Order Management & Processing

- Purchase Order Overview
- Purchase Order Access & Processing
- New Purchase Order
- Access the Supplier Portal with Portal Access
- View Existing Purchase Orders
- Confirm Purchase Order
- Confirm Purchase Order Changes

#### New Purchase Order Arrived for Suppliers Without Portal Access

The supplier received an email about a new order but does not have access to the supplier portal.

Dear Mr. Huber,

Your order is available for you in the Knorr-Bremse supplier portal.

Order number: 4567890123

Please confirm the order soon.

Link: [https://www.knorr-bremse.com/portal/order/4567890123](#)

Customer: 4567890123

Reference: 4567890123

Please confirm the order soon.

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

Questions? We are happy to help!

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1. You have received an email with the header "New Order (Order No.) available" from us.

2. To login, use the login data provided in the email.

3. Once you are logged in, you will see the order. To confirm orders or order changes, please refer to Use Cases "Confirming Orders" and "Confirming Order Changes".

Questions? We are happy to help!

Search for us

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4. Purchase Order Management & Processing

- Purchase Order Overview
- Purchase Order Access & Processing
- New Purchase Order
- Access the Supplier Portal with Portal Access
- View Existing Purchase Orders
- Confirm Purchase Order
- Confirm Purchase Order Changes

General Information

Regarding Purchase Orders

\*Visible functions/buttons may differ depending on the roles & rights assigned

## General Functions

### In this chapter we will see...

- Edit document data
- Supplier Portal: Document overview

- Document Management

# Edit Documents

Use Case Overview

Overview

KNORR-BREMSE

Multi

Setup

GeneralSuppliersLinksPermissionsNotificationsActionsLogExtension Table

Name\*

multi

Custom ID

Keywords

Purchasing organization

Plant

Purchasing group

Category

Category cluster

Notice

Responsible Supplier Contacts

Portal Admin

Files\*

Drag and Drop files or Browse

PAT\_Export\_18705.xml

DOCUMENT FIELDS

Permanent document

☐

Validity\*

2025-07-11

Valid to

Owner

Aneon Partner

Use Case Description

Learn how to edit a document.

- Initially edit a new document when adding it.
- Edit existing documents.
- Use the different functions, connected with a document.
- Activate documents.

Notes

- The editing possibilities may differ due to your role's permissions, the document status and whether you are Owner of the document yourself.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

- General Functions
- Edit Document Data
  - Supplier Portal: Document overview
- Document Types
- Support

- Document Management

## Edit Documents

How to be informed about changes in active documents

Supplier View

Dear Mr. Andreas Hofer,

the document has been updated. See further details in the link below:

Type: Confirmation Test Document (for e.g. SCoC)

Name: test

Link: <https://demo.app11.jaggaer.com/documents#document/general/41622>

1

Questions? We are happy to help!

**Reach out to us**



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### How to be informed about changes in active documents:

If an active document you need to interact with is changed, you will be informed via email.

General Functions

Edit Document Data

Supplier Portal: Document overview

Document Types

Support

# Supplier Portal: Document Overview

Use Case Overview

Overview

KNORR-BREMSE

Documents Overview2 Results

Document Type	Feature type	Document	Status	Owner	Validity	Files	Task Required
Multi Document	Multi Document	multi	New	PA Aneon, Pa... stefan.mat...	-	P4T_Export_18678...	Yes
Document Exchange	Document Exchange	Exchange of Contra...	New	PA Aneon, Pa... stefan.mat...	-	Download.jpg	Yes

Use Case Description

Learn how to navigate the Documents Overview in the JAGGAER Connect supplier portal and how to interact with documents.

- Navigate the document overview.
- Interact with documents provided by CVS.

Notes

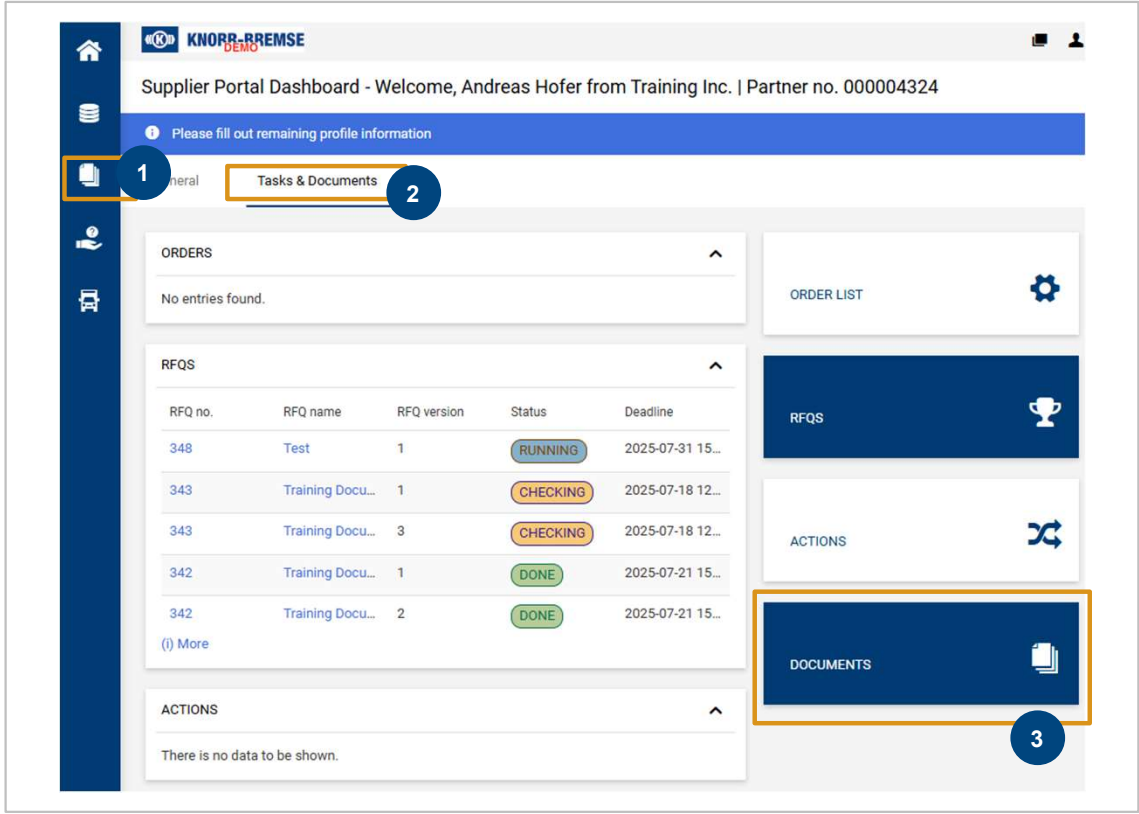
- You will see more details in the specific document types.
- The Dashboard can vary between users because of its customization characteristics.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

General Functions
Edit Document Data
Supplier Portal: Document overview
Document Types
Support

■ Document Management

# Supplier Portal: Document Overview

How to navigate the supplier portal for documents



## How to navigate the supplier portal for documents

1. Click on the Documents icon on the navigation bar to open the Overview.
2. Alternatively, click "Tasks & Documents"
3. Then click Documents to open the Overview

Supplier View

### General Functions

Edit Document Data

### Supplier Portal: Document overview

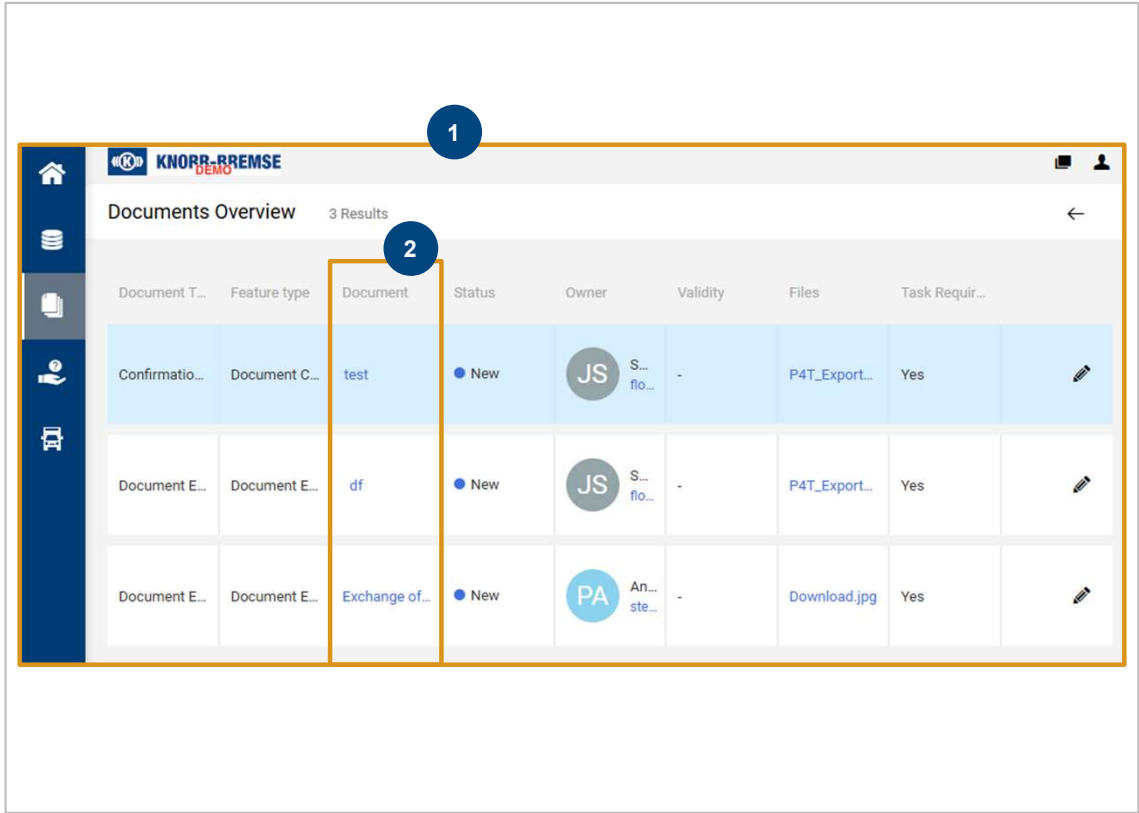
Document Types

Support

■ Document Management

# Supplier Portal: Document Overview

How to navigate the supplier portal for documents



Supplier View

## How to navigate the supplier portal for documents

1. In the Document Overview, you see all the documents, provided, requested or exchanged with CVS with you. From here, you can open and edit them.
2. Click on the name of the document located in the column Document to see detailed information about the document (e.g. Base Data, Document Fields, Supplier fields, and Comments)

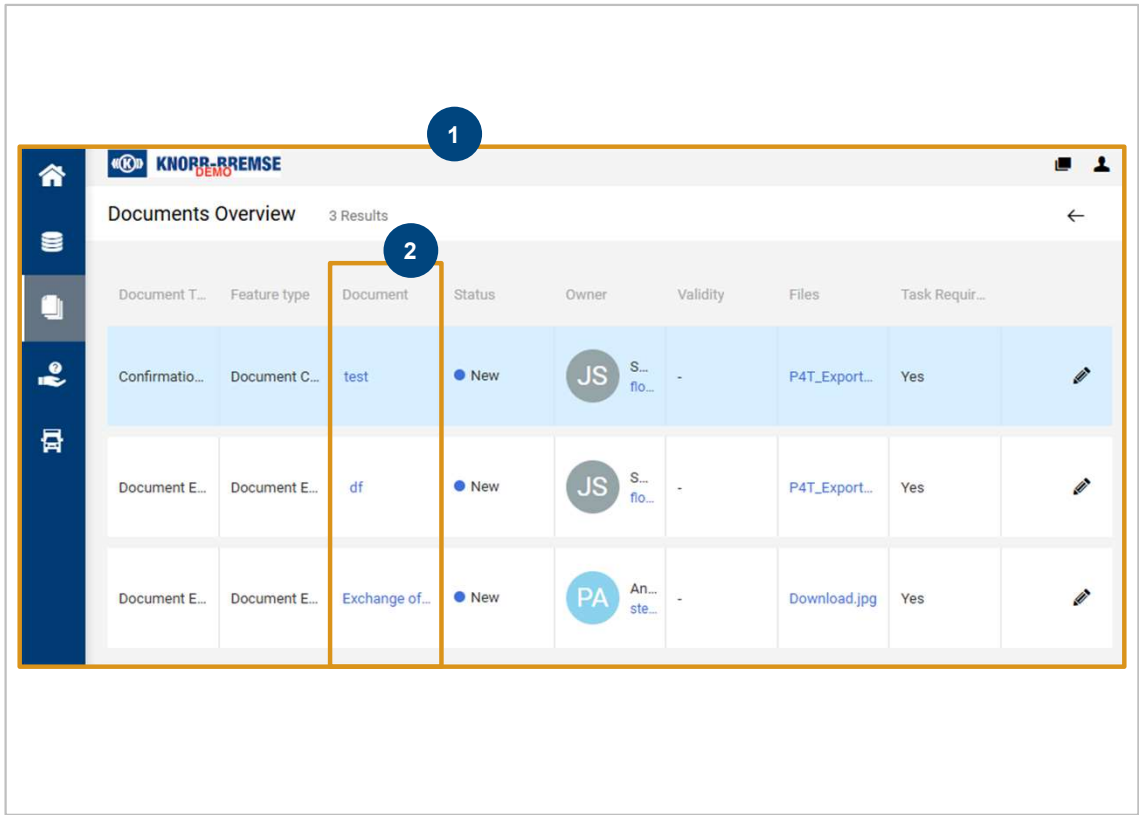
General Functions
Edit Document Data
Supplier Portal: Document overview
Document Types
Support



■ Document Management

# Supplier Portal: Document Overview

How to navigate the supplier portal for documents



Supplier View

## How to navigate the supplier portal for documents

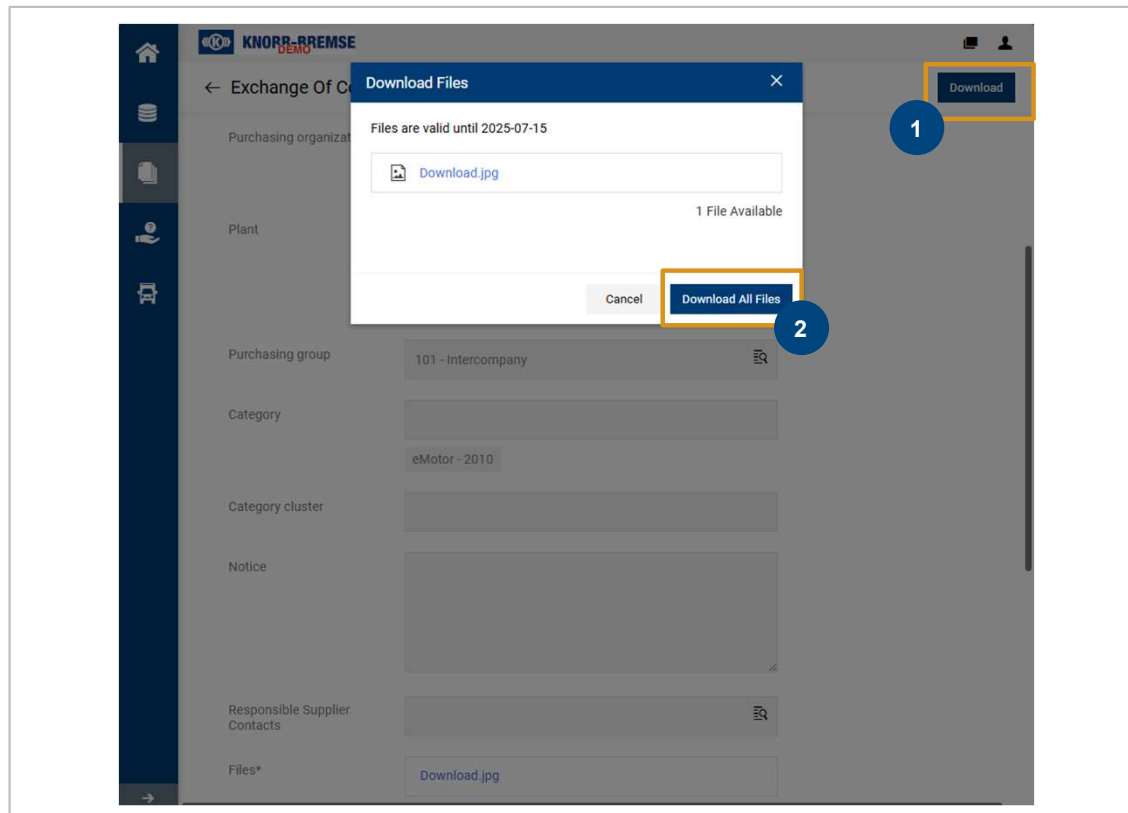
1. In the Document Overview, you see all the documents, provided, requested or exchanged with CVS with you. From here, you can open and edit them.
2. Click on the name of the document located in the column Document to open it and see detailed information about the document (e.g. Base Data, Document Fields, Supplier fields, and Comments).

General Functions
Edit Document Data
Supplier Portal: Document overview
Document Types
Support

- Document Management

## Supplier Portal: Document Overview

How to use documents



Supplier View

### How to use documents:

1. Click the download button in the top right corner.
2. Here, you click download all files. For more specific information, refer to the relevant Document Type section.

#### General Functions

Edit Document Data

#### Supplier Portal: Document overview

Document Types

Support

## Document Types

**In this chapter we will see...**

- Document Type: Document
- Document Type: Multi Document
- Document Type: Confirmation Document
- Document Type: Request Document
- Document Type: Exchange Document

# Document Type: Document

## Use Case Overview

Overview

← Test Standard Document Public - Owner Standard User Test

Active

General

Links

Permissions

Notifications

Actions

Log

Extension Table

BASE DATA

Name\*

test standard document public - Owner Standard User Test

Files

Drag and Drop files or Browse

Custom ID

000161

Keywords

standard User x

Purchasing organization

Plant

Purchasing group

Subcommodity

Use Case Description

Learn how to use the document type “Document”. “Documents” are used, to provide files to the supplier (one-way). Use cases: Meeting minutes, training documents

■ Add Documents to share information with a supplier.

Notes

■ The Dashboard can vary between users because of its customization characteristics.

■ All emails you may receive are sent by no-reply@app11.jaggaer.com.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

Document Management

Document Type: Document

How to open a document as a supplier

Supplier View

How to open a document as a supplier:

- 1. Click on the document icon in the navigation area or use the tile on the home page.
- 2. Click on the view icon to open and view the document.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

1

Supplier Portal Dashboard - Welcome, Andreas Hofer from Training Inc. | Partner no. 000004324

Please fill out remaining profile information

GeneralTasks & Documents

WELCOME

Welcome to the Knorr Bremse Commercial Vehicles Supplier Portal

Dear Sir or Madam,

with the new Supplier Portal, Knorr Bremse Commercial Vehicles wants to ensure more efficient and transparent cooperation with its suppliers.

Your replies help us create profiles that will make it easier for our employees to place requests more correctly and to take well-informed decisions in future.

BLACKBOARD

There is no data to be shown.

COMPANY PROFILE

CONTACT PEOPLE

BANK ACCOUNTS

Documents Overview7 Results

Document T...	Feature type	Document	Status	Owner	Validity	Files	Task Required
Document	Document	KBR Logo	Active	TU Us... geo...			<div>2</div>
Document Re...	Document Re...	Company pre...	Verification	TU Us... geo...	- 2025-03-07		

- Document Management

## Document Type: Multi Document

### Use Case Overview

Overview									
<div> <div>← Documents Overview</div> <div> <div>NEW FILTER</div> <div>DOCUMENT TYPE Document Exchange</div> <div>Add Criteria</div> <div>OR</div> </div> <div> <div>Showing results 1 - 58 of 58</div> <div>(0 selected)</div> <div>100</div> </div> </div>									
	TYPE	DOCUMENT	STATUS	TASK REQUIRED	MAIN DOCUMENT	SUPPLIER	PROGRESS	OWNER	VALIDITY
<input type="checkbox"/>	Document Exchange	NDA Frehner Gar...	Active	No		Frehner Garage G...	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	Aneon File	Active	No		Testcompany2	1	Admin, Aneon	2025-01-01
<input type="checkbox"/>	Document Exchange	Abbauplan 3	Setup	No				Silva-Simonetti, ...	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA Fashion Mo...	Active	No		Fashion Moment...	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA Loya couns...	Active	No		Loya Consulting	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	Signed NDA	Active	No		HUEBNER GmbH	1	User, Training	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA request Fas...	Active	No		ABC Test	1	Frehner, Tobias	2025-01-01

### Use Case Description

Provide a document to multiple supplier (one-way).  
This can be used for policy distribution (e.g. packaging requirements) or onboarding documents.

- Add a new document.
- Select multiple suppliers.
- Open the document as a supplier.

### Notes

- The Dashboard can vary between users because of its customization characteristics.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

### General Functions

### Document Types

Document Type:  
Document

Document Type:  
Multi Document

Document Type:  
Document Confirmation

Document Type:  
Document Request

Document Type:  
Document Exchange

### Support

■ Document Management

# Document Type: Multi Document

How to open a multi document as a supplier


Dear Mr. Andreas Hofer,

The document "multi" with validity date 28 July 2025 was updated and a task was assigned to you.  
Please find more details about the document here:

Type: Multi Document  
Name: multi  
Link: [https://demo.app11.jaggaer.com/portals/9b\\_truck/](https://demo.app11.jaggaer.com/portals/9b_truck/)

Questions? We are happy to help!

Reach out to us



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Documents Overview 2 Results

Document Type	Feature type	Document	Status	Owner	Validity	Files	Task Required
Multi Document	Multi Document	multi	New	PA Aneon, Pa-stefan.mat...	-	PHI_Export_18678...	Yes
Document Exchange	Document Exchange	Exchange of Contra...	New	PA Aneon, Pa-stefan.mat...	-	Download.jpg	Yes

KNORR-BREMSE

Multi New

Please download the provided files from the customer by activating the "Download" button.

BASE DATA

Name\*

multi

Custom ID

Quick Navigation

Base Data

Document Fields

Supplier Fields

Supplier View

- How to open a multi document as a supplier:
1. You receive an email notification.
  2. You can edit the document clicking the pencil icon.
  3. In the document click on download to receive the attached file.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

# Document Type: Document Confirmation

## Use Case Overview

Overview

Check

Files

Supplier+Declaration+for+non-russian+origin+of+iron+...

1 File Available

Accept

Decline

Comment\*

Reason for decline

Cancel

Save

Use Case Description

Upload a document to the 'Supplier Portal' and request the supplier to download and confirm it. As supplier, then act on this confirmation request.

- Upload a document to the supplier portal.
- Answer the request for confirmation.
- Act on behalf of the supplier.

Notes

- The Dashboard can vary between users because of its customization characteristics.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support



Document Management

# Document Type: Document Confirmation

How to open a document as a supplier

Dear Mr. Andreas Hofer,

The document "test" with validity date 29 July 2025 was updated and a task was assigned to you. Please find more details about the document here:

Type: Confirmation Test Document (for e.g. SCnG)  
Name: test  
Link: [https://demo.app11.jaggaer.com/portals/kb\\_truck/](https://demo.app11.jaggaer.com/portals/kb_truck/)

Questions? We are happy to help!

Reach out to us

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IMPRINT ABOUT US DATA PRIVACY

1

3

4

2

Supplier View

How to open a document as a supplier:

1. You receive an email notification about a new document that requires confirmation.
2. Open the document by clicking the edit icon.
3. Review the document and decide whether to accept/confirm or decline it.
4. Download the document to review it before deciding.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

■ Document Management

# Document Type: Document Confirmation

How to confirm or decline a document as a supplier

Supplier View

1

EU Sanctions Against Russia - L...

Check

Download

Please accept or decline the provided files from the customer by activating the "Check" bu... X

BASE DATA

Name\*EU sanctions against Russia - Law requireme...

Custom IDConfirmation 000031

KeywordsRussia Sanctions

2

Check

Files

Supplier+Declaration+for+non-russian+origin+of+iron+...

1 File Available

Accept

Decline

Cancel

Save

3

Check

Files

Supplier+Declaration+for+non-russian+origin+of+iron+...

1 File Available

Accept

Decline

Comment\*

Reason for decline

Cancel

Save

## How to confirm or decline a document as a supplier:

1. Check the document to decide whether to accept/confirm or decline the document.
2. Accept the document and save the decision.
3. Decline the document and provide a comment before saving it. The status of the documents gets automatically set to "declined".

### General Functions

### Document Types

Document Type:  
Document

Document Type:  
Multi Document

### Document Type: Document Confirmation

Document Type:  
Document Request

Document Type:  
Document Exchange

### Support

■ Document Management

## Document Type: Document Request

### Use Case Overview

Overview									
← Documents Overview - <span>🔍</span> <span>🔗</span> <span>🔽</span> <span>Add</span> <span>...</span>									
NEW FILTER <span>📄</span> <span>🔍</span> <span>Apply</span> <span>Reset</span>									
DOCUMENT TYPE <span>Document Exchange</span> <span>×</span> <span>Add Criteria</span> <span>↔</span> OR									
Showing results 1 - 58 of 58 <span>(0 selected)</span>   100 <span>⏪</span> <span>1</span> <span>⏩</span>									
<input type="checkbox"/>	TYPE	DOCUMENT	STATUS	TASK REQUIRED	MAIN DOCUMENT	SUPPLIER	PROGRESS	OWNER	VALIDITY
<input type="checkbox"/>	Document Exchange		Active	No		Frehner Garage G...	<div><div>1</div></div>		2025-01
<input type="checkbox"/>	Document Exchange	Aneon File	Active	No		Testcompany2	<div><div>1</div></div>		2025-01
<input type="checkbox"/>	Document Exchange	Abbauplan 3	Setup	No					2025-01
<input type="checkbox"/>	Document Exchange	NDA Fashion Mo...	Active	No		Fashion Moment...	<div><div>1</div></div>		2025-01
<input type="checkbox"/>	Document Exchange	NDA Loya counsi...	Active	No		Loya Counselling	<div><div>1</div></div>		2025-01
<input type="checkbox"/>	Document Exchange	Signed NDA	Active	No		HUEBNER GmbH	<div><div>1</div></div>		2025-01
<input type="checkbox"/>	Document Exchange	NDA request Fas...	Active	No		ABC Test	<div><div>1</div></div>		2025-01

### Use Case Description

Request a document from the supplier.

- Request a document from the supplier.
- Download the requested document.
- Decide if a document should be accepted or declined.
- Act on behalf of the supplier.

### Notes

- The Dashboard can vary between users because of its customization characteristics.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

### General Functions

### Document Types

Document Type:  
Document

Document Type:  
Multi Document

Document Type:  
Document Confirmation

Document Type:  
Document Request

Document Type:  
Document Exchange

### Support

■ Document Management

# Document Type: Document Request

How to open a document request as a supplier


Dear Mr. Andreas Hofer,

The document "Document Request" with validity date 29 July 2025 was updated and a task was assigned to you. Please find more details about the document here:

Type: CO2 reduction plan - Request  
Name: Document Request  
Link: [https://demo.asp11.jaggaer.com/portal/3b\\_truck/](https://demo.asp11.jaggaer.com/portal/3b_truck/)



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Documents Overview6 Results

Document Type	Feature type	Document	Status	Owner	Validity	Files	Task Required
Document Re...	Document Re...	Company pres...	New		-		Yes
Document Exc...	Document Exc...	Signed NDA	Accepted		2025-02-21 - 2...	DAF1400M.we...	

Supplier View

### How to open a document request as a supplier:

1. You get informed via email that a new document is requested.
2. Open the document request by clicking the edit icon.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

■ Document Management

## Document Type: Document Request

How to send a document or decline the request as a supplier

← Company Presentation

New

Decline

Upload

Please upload the requested files with a validity date by activating the "Upload" button or d... X

BASE DATA

Name\*Company presentation

Custom IDRequest 000047

Keywords

Purchasing organization

Plant

Decline

Comment\*  
Write a comment here

CancelSave

Upload Files (by clicking on "Upload" it is send to KB)

Files\*  
Drag and Drop files or Browse

Valid to\*  
Calendar icon

Comment  
Write a comment here

CancelUpload

### How to send a document or decline the request as a supplier:

1. You decide either to decline the request or to provide the requested document.
2. After reading the information about the request, you can upload the requested document.
3. After reading the information about the request, you can decline the request, but a comment must be provided.

Supplier View

General Functions

Document Types

Document Type:  
Document

Document Type:  
Multi Document

Document Type:  
Document Confirmation

Document Type:  
Document Request

Document Type:  
Document Exchange

Support

■ Document Management

# Document Type: Document Exchange

## Use Case Overview

Overview

← Documents Overview

NEW FILTER

DOCUMENT TYPE Document Exchange

Showing results 1 - 58 of 58

Apply

Reset

OR

	TYPE	DOCUMENT	STATUS	TASK REQUIRED	MAIN DOCUMENT	SUPPLIER	PROGRESS	OWNER	VALIDITY
<input type="checkbox"/>	Document Exchange	NDA Frehner Gar...	Active	No		Frehner Garage G...	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	Aneon File	Active	No		Testcompany2	1	Admin, Aneon	2025-01-01
<input type="checkbox"/>	Document Exchange	Abbauplan 3	Setup	No				Silva-Simonetti, ...	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA Fashion Mo...	Active	No		Fashion Moment...	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA Loya couns...	Active	No		Loya Consulting	1	Frehner, Tobias	2025-01-01
<input type="checkbox"/>	Document Exchange	Signed NDA	Active	No		HUEBNER GmbH	1	User, Training	2025-01-01
<input type="checkbox"/>	Document Exchange	NDA request Fas...	Active	No		ABC Test	1	Frehner, Tobias	2025-01-01

Use Case Description

Upload a document to the JAGGAER Connect 'Supplier Portal' and request the supplier to download and upload the edited version.

- Upload a document to the supplier portal.
- Exchange documents with the supplier.
- Verify documents uploaded by the supplier.
- Renew the request for confirmation.
- Act on behalf of the supplier.

Notes

- The Dashboard can vary between users because of its customization characteristics.
- All emails you may receive are sent by no-reply@app11.jaggaer.com.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

■ Document Management

# Document Type: Document Exchange

How to open a document as a supplier


Dear Mr. Andreas Hofer,

The document "df" with validity date 29 July 2025 was updated and a task was assigned to you. Please find more details about the document here:

Type: Document Exchange  
Name: df  
Link: [https://demo.apo11.jaggaer.com/portals/5b\\_truck/](https://demo.apo11.jaggaer.com/portals/5b_truck/)

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 Knorr-Bremse Group

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← Signed NDA

New

Download

Please download the provided files from the customer by activating the "Download" button.

BASE DATA

Name\*

Signed NDA

Custom ID

Exchange 000075

Keywords

NDA

Purchasing organization

Plant

Documents Overview

5 Results

Document Type	Feature type	Document	Status	Owner	Validity	Files	Task Required
Document Exc...	Document Exc...	Signed NDA	New	TU User, ... georg...	-	DAF1400M.we...	Yes
Document Exc...	Document Exc...	edefwf	Expired	AA Admi... julian...	2025-02-11 - 2...	leer.png	

Supplier View

## How to open a document as a supplier:

1. You are informed via email that a new document needs to be exchanged.
2. Open the document by clicking the edit icon.
3. Download the document to review and edit it.

General Functions
Document Types
Document Type: Document
Document Type: Multi Document
Document Type: Document Confirmation
Document Type: Document Request
Document Type: Document Exchange
Support

■ Document Management

## Document Type: Document Exchange

How to upload a document or decline a document as a supplier

← Signed NDA   Downloaded   Decline   Download   Upload

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

BASE DATA

Name\*   Signed NDA

Custom ID   Exchange 000075

Keywords   NDA

Purchasing organization

Plant

Purchasing group

Decline

Comment\*

Write a comment here

Cancel   Save

Upload Files (by clicking on "Upload" it is send to KB)

Files\*

Drag and Drop files or Browse

Valid to\*

Comment

Write a comment here

Cancel   Upload

### How to upload a document or decline a document as a supplier:

1. Only after downloading the document, you can either upload the edited document or decline.
2. After editing the document like requested, you can upload the file. Provide a validity date and if useful provide a comment.
3. After downloading the document, you can decline the document and provide a comment for the rejection.

Supplier View

General Functions

Document Types

Document Type:  
Document

Document Type:  
Multi Document

Document Type:  
Document Confirmation

Document Type:  
Document Request

Document Type:  
Document Exchange

Support