



bertrandt

dccc

Xtanio for suppliers

Training Material

V1.2 24.03.2023



**Registration &
Administration**

Registration on Xtanio



Your personal invitation to Xtanio

Dear Christian Krenn,
as already communicated Bertrandt AG will use the Xtanio platform for sharing quality certificates and proofs. Your company has already been onboarded to the platform and your existing documents have been added.

To finalize onboarding please reset your password via the following [link](#).

After resetting your password you can logon with your email address.

Note that by 01.06.2022 every certificate request must be fulfilled via the Xtanio platform. Please keep all your certificates up-to-date. Thus, you can also actively provide additional quality certificates via Xtanio. As a service, you will be notified for renewal.

In case of questions please contact xtanio@bertrandt.com



Change Password (Christian Krenn)

Password

Confirm Your New Password

Cancel Save

Log in

Email Address

Password

Log in Forget password

Steps to register on Xtanio

- 1 Click on link in invitation mail
- 2 Set a new password
- 3 Logon with email address and new password
- 4 Now you are in and can manage your company profile (next slide)

Manage company profile

Notes on company profile administration

- Company meta data shown in header section is taken from head quarter location, edit there
- For deleting a company location, please contact Xtanio support via contact form

Your profile NO

SIGNED IN AS
CHRISTIAN KRENN
christian.krenn@dccc.de

My Company Page 1

Contact Us!
Get Help!
Account Settings
Change Password
Sign Out

Xtanio NO NO

Inbox 3 Dashboard 1 **Your profile** NO

DCCS GmbH NO

Information Technology/IT
Sternäckerweg 44, Graz, 8041, Austria
Your public profile link

This is your site 1
You can preview how other companies see it here.

2 General Information **8** My Documents **7** Users

Description DCCS is a successful provider of future-proof IT business solutions and digitization partner for corporations as well as large and medium-sized companies with more than 30 years of experience in the automotive and industrial sectors.

DUNS 098765432
VAT BB12345678
Industry Information Technology/IT
Employees 359
Website <http://www.dccc.at> 3

4 Locations + 5

DCCS GmbH Graz 6
Head office
Sternäckerweg 44
8041 Graz
Austria

DCCS Deutschland GmbH
Sub office
Isaac-Fulda-Allee 5
55124 Mainz
Germany

DCCS d.o.o. PJ Tuzla
Sub office
Mitra Trifunovića Uče 9
75000 Tuzla
Bosna i Hercegovina

DCCS GmbH Standort Stuttgart
Sub office
Wankelstraße 14
70563 Standort Stuttgart
Germany 9

Managing the company profile

- 1 Move to company profile
- 2 Company general information
- 3 Company name & logo
- 4 Company locations
- 5 Add company new location
- 6 Edit company new location
- 7 Useradministration
- 8 Provide your documents (e.g., ISO 9001)
- 9 Contact form to contact Xtanio support

User Management

Roles of users

- Company user: is allowed to manage documents
- Company administrator: is allowed to manage company profile and users

The screenshot shows the Xtanio user management interface. At the top, there's a navigation bar with the Xtanio logo, 'Inbox 1 Dashboard', and 'Your profile' with a 'NO LOGO' indicator. Below this, there's a section for 'DCCS GmbH' with contact information and a public profile link. A 'This is your site' message is also present. The main content area has tabs for 'General Information', 'My Documents', and 'Users'. An 'ADD USER' button is visible. Below this, there's a list of users: Christian Krenn (christian.krenn@dccc.at), Erol Paric (erol.paric@dccc.at), and Nedim Mrkaljevic (nedim.mrkaljevic@dccc.at), all with 'Active' status and edit icons.

Managing users

1 Add new user of company

The 'Add User' form contains the following fields: First Name, Last Name, Email, Phone, Function in Company, and Role. There are 'Cancel' and 'Save' buttons at the bottom.

- Role can be company administrator or company user
- By adding a new user, the new user gets an invitation email to set a password and can afterwards logon to the platform

2 Edit User (change role, change other information, set inactive)

- Inactive users cannot logon anymore
- Deleted users cannot be reactivated

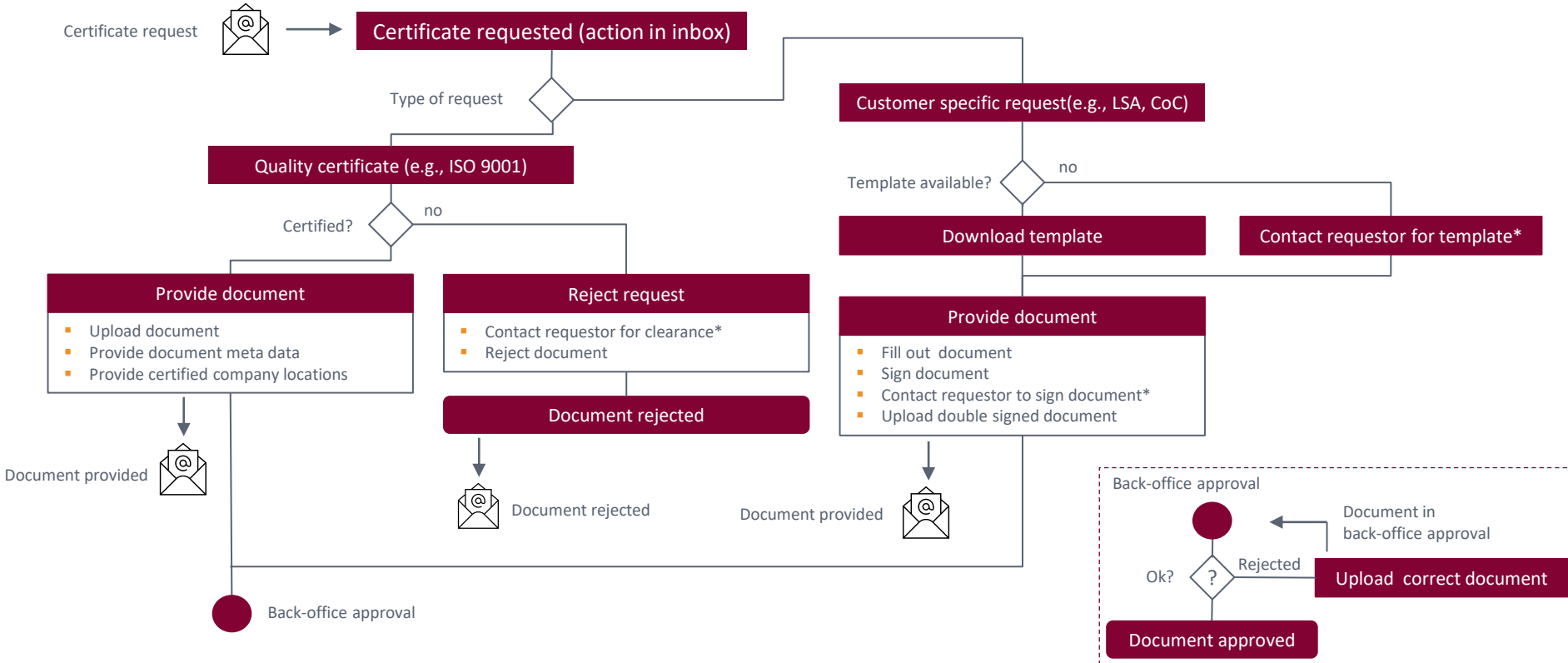
3 Reset password for user


- By resetting the password for a user, the user gets an email to set a new password
- User can logon again after setting a new password



**Providing
documents
process overview**

Process flow document management (supplier side)





**Providing
documents
in more details**

Inbox – Todos and Notifications

The screenshot shows the Xtanio user interface. At the top, there is a navigation bar with the Xtanio logo, 'Inbox' (with a red notification badge '3'), 'Dashboard', and 'Your profile' (with a 'NO' badge). Below the navigation bar, there are two main sections: 'Inbox' and 'Import demands'. The 'Inbox' section contains a description: 'This is an overview of your open tasks and the activities of your business partners.' The 'Import demands' section has a downward arrow icon and the text: 'You may request documents with the bulk excel upload'.

The 'Actions' section is divided into four tabs: 'Requested / 3' (with a red badge '1'), 'Rejected / 0' (with a red badge '2'), 'Expiring / 0' (with a red badge '3'), and 'Users / 0'. Below the tabs, there is a note: 'Note that rejected documents (listed as red) stay in the inbox until requesting company approves rejection.' There are four document request entries, each with a 'NO' status badge and icons for actions:

- ISO 9001**: Bertrand AG requested the certificate ISO 9001 for your location TestCompany. Icons: reject (X), download, upload.
- Code of Conduct (CoC)**: Bertrand AG requested the certificate Code of Conduct (CoC) for your location TestCompany. Icons: reject (X), download, upload.
- Lieferantenselbstauskunft (LSA)**: Bertrand AG requested the certificate Lieferantenselbstauskunft (LSA) for your location TestCompany. Icons: reject (X), download, upload.
- OHSAS 18001**: Bertrand AG requested the certificate OHSAS 18001 for your location TestCompany. Icon: upload.

 Red badges '7', '6', and '5' are placed over the reject, download, and upload icons of the Code of Conduct entry, respectively. A red badge '8' is placed over the upload icon of the OHSAS 18001 entry.

The 'Notifications' section (with a red badge '4') contains three notification cards:

- Bertrand AG - Lieferantenselbstauskunft (LSA)**: The document Lieferantenselbstauskunft (LSA) was requested for location TestCompany by company Bertrand AG.
- Bertrand AG - Code of Conduct (CoC)**: The document Code of Conduct (CoC) was requested for location TestCompany by company Bertrand AG.
- Bertrand AG - ISO 9001**: The document ISO 9001 was requested for location TestCompany by company Bertrand AG.

Actions (Todos) Notifications (information)

- 1 Requested documents by customer
- 2 Uploaded but rejected documents by Xtanio backoffice
- 3 Soon expiring documents – new version to be provided
- 4 Keep track about requests & updates via notifications

Document requests - action details

- 5 Upload a document
- 6 Download doc. template if available (e.g. Code of Conduct)
- 7 Reject document with reason (e.g. not certified)
- 8 Rejected document requests stay open until customer accepts reject – meanwhile uploading a document stays possible (e.g. in case of misunderstandings)

Uploading a document

Xtario Inbox ³ Dashboard Your profile ^{MS}

Inbox

This is an overview of your open tasks and the activities of your business partners.

Import demands

You may request documents with the bulk excel upload

Actions

Requested / 3 Rejected / 0 Expiring / 0 Users / 0

Note that rejected documents (listed as red) stay in the inbox until requesting company approves rejection.

- NO** **ISO 9001**
Bertrand AG requested the certificate ISO 9001 for your location TestCompany
- NO** **Code of Conduct (CoC)**
Bertrand AG requested the certificate Code of Conduct (CoC) for your location TestCompany
- NO** **Lieferantenselbstauskunft (LSA)**
Bertrand AG requested the certificate Lieferantenselbstauskunft (LSA) for your location TestCompany
- NO** **EN 16636**
Bertrand AG requested the certificate EN 16636 for your location Alsum Europe GmbH

Notifications

- NO** **Bertrand AG - Lieferantenselbstauskunft (LSA)**
The document Lieferantenselbstauskunft (LSA) was requested for location TestCompany by company Bertrand AG
- NO** **Bertrand AG - Code of Conduct (CoC)**
The document Code of Conduct (CoC) was requested for location TestCompany by company Bertrand AG
- NO** **Bertrand AG - ISO 9001**
The document ISO 9001 was requested for location TestCompany by company Bertrand AG

2 Upload the appropriate document

Upload screen for certificates (e.g. ISO9001)

Upload new document

Document type: ISO 9001

Upload Files
Download the file to upload or drag here

Cancel Next Step

- Either click and select or use drag and drop to the document

3 Document is parsed by platform

- Can take some seconds, optionally click "proceed" to manually move to next step

4 Provide document meta data

Upload new document

Document type: ISO 9001

Valid for Locations

Valid from Valid until

Certificate number

Cancel Next Step

- Meta data depends on document type
- Provide valid company locations

Upload screen for document forms (eg CoC)

Upload new document

Document type: Code of Conduct (CoC)

Download Document Template

Upload Files
Download the file to upload or drag here

Cancel Next Step

- Download template via link
- Fill out template sign it
- Send it via mail for signature to your customer contact
- Upload double signed document
- If no template is available, contact your customer contact for providing it

5 Upload finished

Documents are successfully uploaded.
It can take up to 30 minutes until your document is visible since we run automated test to verify your data.

Okay

- Document is automatically approved or in Back-office approval for manual checks
- Back-office rejections appear in action tab
- Check for reason and upload new version

Rejecting a document

Xtanio Inbox ³ Dashboard Your profile

Inbox

This is an overview of your open tasks and the activities of your business partners.

Import demands

You may request documents with the bulk excel upload

Actions

Requested / 3	Rejected / 0	Expiring / 0	Users / 0
Note that rejected documents (listed as red) stay in the inbox until requesting company approves rejection.			
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <p>ISO 9001</p> <p>Bertrandt AG requested the certificate ISO 9001 for your location TestCompany</p> <div style="display: flex; align-items: center; gap: 10px;"> </div> </div> </div>			
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <p>Code of Conduct (CoC)</p> <p>Bertrandt AG requested the certificate Code of Conduct (CoC) for your location TestCompany</p> <div style="display: flex; align-items: center; gap: 10px;"> </div> </div> </div>			
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <p>Lieferantenselbstauskunft (L SA)</p> <p>Bertrandt AG requested the certificate Lieferantenselbstauskunft (LSA) for your location TestCompany</p> <div style="display: flex; align-items: center; gap: 10px;"> </div> </div> </div>			
<div style="display: flex; align-items: flex-start;"> <div style="margin-right: 10px;"></div> <div> <p>EN 16636</p> <p>Bertrandt AG requested the certificate EN 16636 for your location Altium Europe GmbH</p> <div style="display: flex; align-items: center; gap: 10px;"> </div> </div> </div>			

Notifications

Bertrandt AG - Lieferantenselbstauskunft (L SA)

The document Lieferantenselbstauskunft (LSA) was requested for location TestCompany by company Bertrandt AG

Bertrandt AG - Code of Conduct (CoC)

The document Code of Conduct (CoC) was requested for location TestCompany by company Bertrandt AG

Bertrandt AG - ISO 9001

The document ISO 9001 was requested for location TestCompany by company Bertrandt AG

- 1 If you can not provide a document for whatever reason, inform your customer contact
- 2 Reject it via platform

Reject certificate request. ✕

Provide a reason for rejecting request

Document not available - not certified

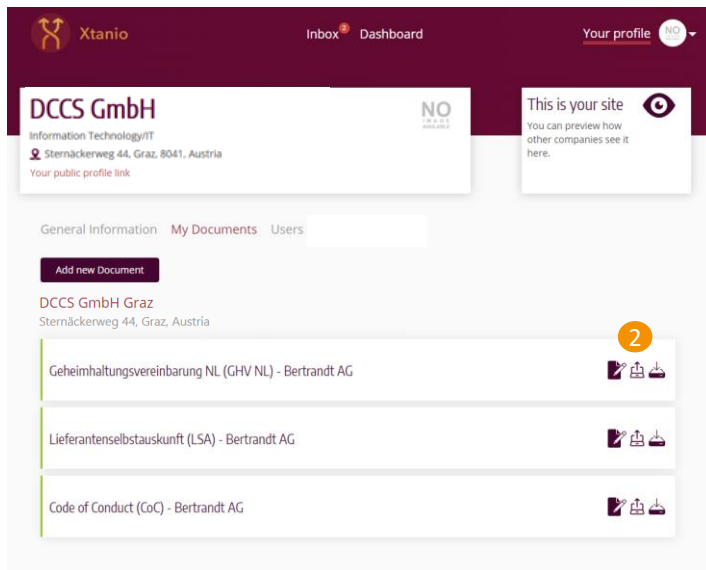
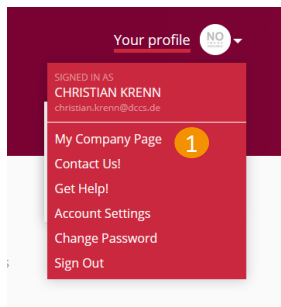
Cancel
Reject request

- Provide reason for rejection
- Rejected documents stay read in requested action until customer accepts rejection

Providing new version of a document

Provide a new version of a document if

- you have a new version (e.g., recertification, new company locations included)
- you get reminded by the platform that current version will expire / is not valid any more



- 1 Move to company profile
- 2 Add a new document version
 - Also possible via dashboard

Actively provide company certificates

Publish actively a document / a certification

- If customer needs it, it is automatically provided by the platform

The screenshot displays the Xtanio user interface. On the left, a navigation menu is open, showing options like 'My Company Page' (marked with a '1'), 'Contact Us!', 'Get Help!', 'Account Settings', 'Change Password', and 'Sign Out'. The main content area shows the profile for 'DCCS GmbH', an Information Technology/IT company located at Sternäckerweg 44, Graz, 8041, Austria. A 'NO IMAGE AVAILABLE' placeholder is shown. Below this, there are tabs for 'General Information', 'My Documents', and 'Users'. The 'My Documents' tab is active, showing an 'Add new Document' button (marked with a '2') and a document titled 'IATF 16949 (12345678)' valid from 11/01/2022 until 11/03/2024. A 'This is your site' preview box is also visible.

1 Move to company profile

2 Add the document

Dashboard

The dashboard shows your compliance state

- Thus, it allows you uploading new document versions

Compliance Status
This is an overview of all the documents you have requested from other companies

Export List
Export all Documents as .xlsx including request status

Direction: My customers

Status: All

Document Name: [Input field]

Company Name: [Input field]

Search

Overall Status 1
3 / 60% (Green) 2 / 40% (Red)

Selected Certificates 3 / 60% (Green) 0 / 0% (Yellow) 2 / 40% (Red) 2

Bertrand AG

DCCS GmbH Graz
Sternäckerweg 44, Graz, Austria

Geheimhaltungsvereinbarung NL (GHV NL)	[Upload] [Delete] 4
EN 16636	[Upload] [Delete]
ISO 9001	[Upload] [Delete]
Lieferantenselbstauskunft (LSA)	[Upload] [Delete]
Code of Conduct (CoC)	[Upload] [Delete]

- 1 Overall status
- 2 Filtered status
- 3 Filter options
- 4 Uploading new document version, download a document



dccs

Jointly successful!

www.dccs.eu