Agile Product Lifecycle Management

Product Cost Management User Guide

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Preface

The Oracle|Agile documentation set includes Adobe® Acrobat™ PDF files. The Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html) contains the latest versions of the Oracle|Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Oracle|Agile Documentation folder available on your network from which you can access the Oracle|Agile documentation (PDF) files.

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The Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html) can be accessed through Help > Manuals in both the Agile Web Client and the Agile Java Client. If you need additional assistance or information, please contact support (http://www.oracle.com/agile/support.html) (http://www.oracle.com/agile/support.html) for assistance.

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Readme

Any last-minute information about Oracle|Agile PLM can be found in the Readme file on the Oracle Technology Network (OTN) Web site (http://www.oracle.com/technology/documentation/agile.html)

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Chapter 1

Introduction

This chapter includes the following:

- What is Product Cost Management 1
- Commodity and Supplier Leveraging 1
- Co-sourcing and Re-price Management 2
- Design for Cost and Supply 2
- New Business Acquisition 2
- Agile Client Applications 2
- Licenses 3
- Item Master and Sourcing Projects 3
- Understanding Ship To Locations 4
- Searching Agile Objects 5
- Working with Customers, Suppliers, and Partners 5

What is Product Cost Management

Agile Product Cost Management (PCM) enables companies to manage direct material sourcing across the product cost lifecycle, from product inception to the product's end-of-life. It is designed to continuously manage a product's lifecycle cost against a company's target cost objectives and maximize lifecycle profitability.

It addresses the requirements across a multi-tiered network of materials and resources consumed in the delivery of the product to the customer, and it allows key people within sales/marketing, procurement, operations, engineering, and trading partners to collaborate on product design decisions.

There are four distinct levels of cost reduction that you can achieve by implementing Agile PCM:

- Commodity and Supplier Leveraging
- Co-sourcing and Re-price Management
- Design for Total Cost and Margins
- New Business Acquisition

Commodity and Supplier Leveraging

A company can reduce product costs by identifying the leverage opportunities across suppliers and manufacturing partners. Agile PCM provides a forward and comprehensive lifecycle view of the product forecast, new product bills of material, product changes, and cost/quote history. It fully automates the creation of the bid package, the bidding and negotiation process, and supplier/customer contract management.

Agile PCM lets you abstract and aggregate the appropriate view of product usage across all relevant product records. You can analyze the potential cost impact of a change collaboratively, in real-time, across all partners and suppliers. A successful sourcing strategy enables a company to reduce sourcing cycle time and direct materials spending while improving overall sourcing efficiency.

Co-sourcing and Re-price Management

In addition to reducing sourcing cycle time and direct materials spending, companies can use Agile PCM to develop sourcing strategies that extend across their network of manufacturing contractors and suppliers. With Agile PCM, companies can ensure BOM accuracy across their multi-tier network of manufacturing partners and suppliers.

With Agile PCM, all business partners are assured they are using the current bills of material while responding to and analyzing material and non-material cost adders. Inter-enterprise sourcing teams collaboratively uncover savings opportunities through co-sourcing analysis, which identifies the strongest collective negotiation position. On a regularly scheduled basis, you can renegotiate and reset prices as the market dictates.

Design for Cost and Supply

Agile PCM improves New Product Introduction (NPI) processes by aligning design objectives with sourcing strategies to achieve product cost targets and minimize supply risks. Companies that design for cost and supply analyze each design selection against downstream supply and manufacturing objectives.

During the early design phase, your supply and cost planning teams stay current against dynamically changing product structures. They are provided the capabilities to cost each program, factor sourcing alternatives, forward cost projections and time-based constraints. Within a project-based environment, design and sourcing teams can establish an audit trail of bi-directional changes against the bills of material, sourcing alternative recommendations, and price updates.

Agile PCM allows you to achieve target costing, manage component obsolescence, identify at-risk items and suppliers earlier in the process, and drive sourcing preference management into the design phase.

New Business Acquisition

Agile PCM can be used to support the new business acquisition process across the front and back office. Automating the re-use of a rich repository of contract prices, previous quotes and ERP cost feeds, with the ability to gather new cost information (deltas), you can dramatically reduce average customer response time to new business requirements. The results include the ability to process a higher volume of price quotes faster, improving operating efficiency and customer win rates.

Agile Client Applications

Agile PLM provides two clients:

- Web Client — HTML-based client that you run from a Web browser. It requires no client-side installation. The Web Client provides full access to Agile PCM functionality, but limited access to administration features.
- Java Client — Java application that provides advanced UI features, such as multiple windows, and full access to Agile administration features. You install Java Client locally, and it is updated automatically over the network via Java WebStart. The Agile Java Client allows you to search for Agile PCM objects, such as projects and RFQs, but not create them.

Use the Web Client to access most Agile PCM functionality, such as creating sourcing projects, RFQs, and RFQ responses. Use the Java Client to administer the Agile PLM server.

Unless otherwise noted, the Web Client is used throughout this manual to perform Agile PCM procedures. For general information about Agile Web Client functionality, see *Getting Started with Agile PLM*.

Licenses

The Agile PLM suite consists of many product solutions and server licenses. The following server licenses enable Product Cost Management functionality:

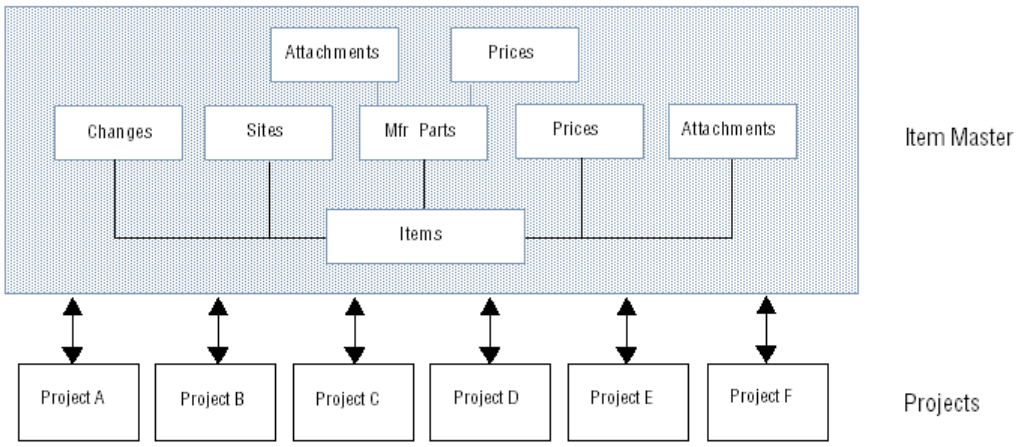
- Products — the basic Agile license for all companies, provides access to Item objects (including BOMs), Engineering Change Objects, Commodities, and Product & Process Reports.
- Sourcing — provides access to Sourcing Projects, RFQs, RFQ Responses, and Sourcing Reports.
- Price Management — provides access to Price, Price Change Orders (PCOs), and Sourcing Reports.
- Organization — allows you to create and manage Suppliers and Customers.
- Sites — provides access to Site objects, which allows you to define multiple manufacturing sites. You can also use Site Change Orders to control changes to Sites. The Sites license is not needed for Product Cost Management, but with it you can create site-specific sourcing projects.

For a complete list of Agile PLM server licenses, see *Administrator Guide*.

Item Master and Sourcing Projects

The Item Master is also known as the product record. It is the entire collection of Items — Parts, Documents, and any other user-defined subclasses of the Items class maintained under change control in the Agile system. If you run a search for all Items in Agile PLM, the search results would essentially be from the Item Master. However, the Item Master also includes all objects associated with Item revisions, such as changes (ECOs, MCOs, SCOs), sites, manufacturer parts, and prices.

Although the Item Master is not visible in the Agile PLM client user interface, it figures prominently in Agile PCM. Most data that you bring into a Sourcing Project comes from the Item Master, as shown in the figure below. You can also create new project items or import them from external data files.



When you add data to a Sourcing Project, you can select objects from the Item Master. If you make changes to Items or Manufacturer Parts contained within a project, you can publish the changes to the Item Master to update the following content:

- Items
  - Bills of Material
  - Approved Manufacturer Lists
- Manufacturer Parts

You can selectively import BOM Items using filters. For more information about publishing Items and Manufacturer Parts to the Item Master, see "Publishing Items and Manufacturer Parts (on page 44)".

After you finish negotiating prices with your suppliers, you can also publish them to the Item Master. For more information about publishing prices, see "Publishing Prices for Items and Manufacturer Parts (on page 60)".

Each project can have a specific manufacturing site, which constrains the project to include only items associated with that site.

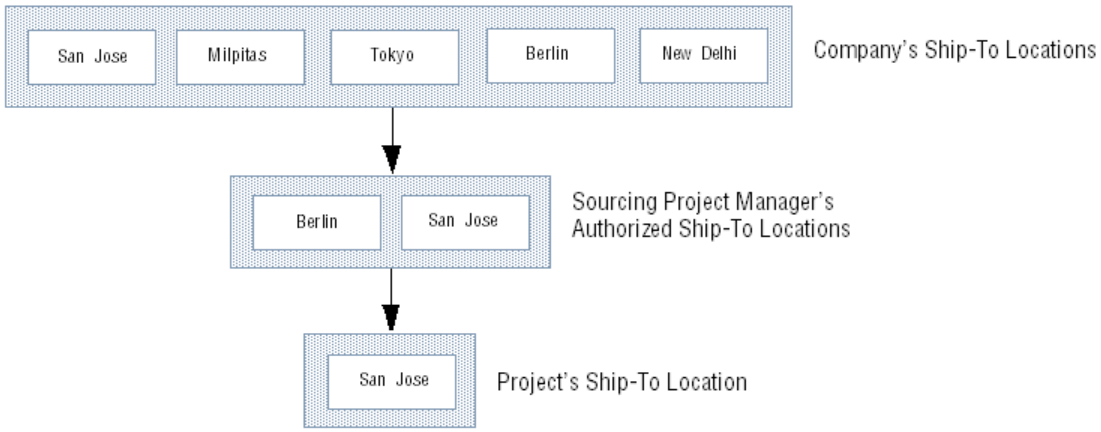
Understanding Ship To Locations

When the Agile PLM administrator configures system settings for Agile PCM, one of the things he must do is define the Ship To locations. As the name implies, a Ship To location is one place where suppliers can ship materials directly to fulfill orders made by your company. Ship To locations are important to the product sourcing process for several reasons:

- The Agile administrator defines system-wide Ship To locations in the Agile Java Client. For more information, see *Administrator Guide*.

- Sourcing Project managers must have at least one authorized Ship To location defined in their user profile. Otherwise, they won't be able to specify a Ship To location for Sourcing Projects.
- Each Sourcing Project must have a specific Ship To location. Without a Ship To location, the project status cannot be changed from Draft to Open.
- When sourcing managers send RFQs to Suppliers, they can choose to disseminate the RFQs only to the Suppliers with manufacturer or commodity offerings that match the desired parts, ratings, and Ship To location.

The following Figure is an example of how a company's Ship To locations are assigned to a Sourcing Project manager, who selects a specific Ship To location for a Sourcing Project.



Searching Agile Objects

When you use Agile PLM, you will need to find existing objects in the Agile system, such as sourcing projects, suppliers, items, and manufacturer parts, and RFQs. You can search objects in the following ways:

- Simple Search — Searches objects by Name, Number, or Description.
- Advanced Search — Searches all objects with fields that match the conditions you have defined. For example, you could search for parts where the Description field contains "Computer."
- Saved Searches — Pre-defined searches that have been saved for later use.
- Bookmarks — A list of frequently visited Agile objects. You can Click a bookmark to quickly display that object.

For complete information about how to search for Agile objects, see *Getting Started with Agile PLM*.

Working with Customers, Suppliers, and Partners

You can use Agile PLM to manage organizations that exist outside your company, such as Customers, Suppliers, and Partners. These outside organizations participate in business processes such as sourcing, quality management, and design engineering, and are involved throughout various phases and activities of a program.

Customers and Suppliers are two Agile PLM classes you can use to define organizations. Partners are the Suppliers with whom your company has a special relationship. Partners are given access to complete project BOMs, whereas ordinary suppliers can view only the information about assigned Items in an RFQ.

Each Sourcing Project can be associated with a Customer, Supplier, and/or Partner. These objects must exist in the Agile system before you create a project.

For details on how to create and manage Customers and Suppliers, see the chapter called “Managing Customers and Suppliers” in *Getting Started with Agile PLM*.

Chapter 2

Working with Sourcing Projects

This chapter includes the following:

- About Sourcing Projects 7
- Creating a New Sourcing Project 8
- Sharing a Project with Other Users 14
- BOM Filtering 15
- Configuring Project Tabs 18
- Using the Filter Toolbar 19
- Adding Items to a Project 20
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- Selecting Data to Share with Suppliers 22
- Updating Project Content from the Item Master 23
- Modifying Price Scenarios 24
- Quickstep to Costed BOM 25
- Other Project Actions 26

About Sourcing Projects

A sourcing project is the entry point of sourcing and product pricing. A sourcing project tracks data required for sourcing and pricing, to perform data analysis for effective pricing.

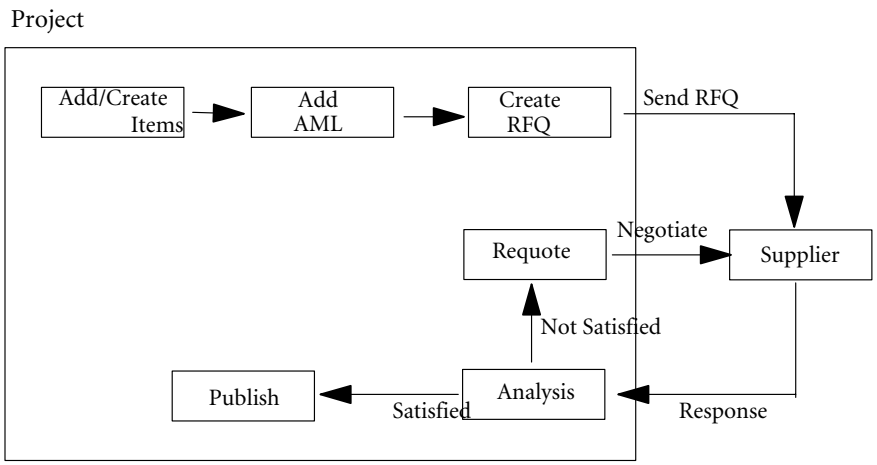
The project data includes Items and Assemblies, Bills of Material (BOMs), and Approved Manufacturers Lists (AML). Multiple users can work as a team to complete sourcing and pricing activities, since the project lets multiple users view and modify the same components. Projects allow you to execute sourcing activities, including Request for Quotes (RFQs), depending on the lifecycle phase and analysis of your Item Master content.

The Product Cost Management (PCM) consists of the Product Sourcing solution in combination with the Price Management solution to integrate and leverage valuable price and cost information within your business processes. In PCM, projects are indicated by .

You can create a project from scratch or copy it using the Actions > Save As command. The copied projects will not contain information such as partners, RFQs, supplier responses, and history.

Note You access Sourcing Projects primarily through the Agile Web Client.

The following diagram shows how a project functions in the RFQ, supplier response, and analysis flow in Product Cost Management.



Project Lifecycle Phases

The lifecycle phases of a project are Draft, Open, and Closed. A project is in the Draft state when it is created. You can create RFQs and receive supplier responses when the project state is Open. You can change the status of the project from the Change Status menu.

Note The Ship To Location field on the General Information tab must be filled in before you can change the state of the project from Draft to Open.

A project remains open until the project owner changes the status to Closed.

Status	Description
Draft	This is the initial lifecycle phase of a project. In this state, you can edit only the Cover Page attributes, Item component data, and Attachments. However, in this state, you cannot create RFQs from the project.
Open	The RFQ creation and supplier responses are active after the project is moved to the Open state.
Closed	Set by the project owner when all tasks for the project are completed.

Creating a New Sourcing Project

Quick step from an Item

You can create a new project directly from Item page within Agile Product Collaboration (PC).

1. Search and select an Item, or create new.

2. Select Create Sourcing Project from Actions drop-down Menu
3. Select the *Sourcing Project Type*.
4. Enter Number, if auto-assign is not available
5. Enter the Price Scenarios (either quantity breaks or effectivity periods)
6. Select *Continue Creation* in Wizard to enter any optional fields

Using the Project Creation Wizard

You can create a new project by choosing Create > Sourcing Project, which launches the Project Creation Wizard. The wizard has the following steps:

1. Create the project
2. Enter sourcing project information
3. Add Items to the project
4. Add attachments to the project

Steps 2, 3 and 4 are optional. You can add items and attachments to the project later.

Note	The fields in the Project Creation Wizard marked in bold are required fields. Fill in required fields to proceed.

Project Creation Wizard: Creating a Project

1. Click Create > Sourcing Project. The *Sourcing Project Creation Wizard* appears.
2. Select a type from the Sourcing Project Type drop-down list.
3. Enter a unique identification number (unique identifier for the project) in the Number field, or Click 123 for the system to generate a number based on pre-defined numbering pattern in accordance with a Project Type.

Note	When there are more than one Project Types defined by your Administrator, the Number Generation Button changes to 123 >

4. Define the price scenarios for the project. Select Quantity Breaks or Effectivity Periods. For more information, see Specifying the Price Scenario (on page 12).
5. If you selected Quantity Breaks, select the number of quantity breaks you want from the drop-down list. You can set up to 6 Quantity Breaks per project.
6. If you selected Effectivity Periods, follow these steps:
   1. Select a number in the Number of Date Periods drop-down list. You can set up to 20 date periods.
   2. Select the period type from the Period Type drop-down list. Available values are Monthly, Quarterly, Semi-Annually, Yearly, and Variable.
   3. If you selected Monthly, Quarterly, Semi-Annually, or Yearly for the Period Type, select the effective start date from the Start Date drop-down list. This date correlates to your

company's fiscal year, which was set during configuration.

4. If you selected Variable for the Period Type, specify the start and end dates for each period.
5. Select a number from the Quantity Breaks per Period drop-down list.

7. Click Continue. The *Entering Sourcing Project Information* page appears.
8. Continue to the next section.

Project Creation Wizard: Entering Sourcing Project Information

1. On the Enter Sourcing Project Information page, enter general information about the project. The following table describes the fields on the Enter Sourcing Project Information page:

Field name	Constraint	Description
Number	Read-only	The unique identification number of the project.
Description	Optional	The description about the project.
Lifecycle Phase	Read-only	The current lifecycle phase of the project. The default state is Draft.
Program	Optional	The program to which the project applies. For example, you can define your programs and information needed for a specific program. You can select the program for which the project is being created from the drop-down list. If no program is selected, the item information such as response lines will be made available to all the projects.
Customer	Optional	Customer to whom the project applies. You can select the customer by clicking the button next to this field and running a search. If you leave this field blank, the project information is applied to all the customers.
Manufacturing Site	Optional	The site where the project will be handled. You can select the site from the drop-down list. Select a site only if the project is site-specific. If so, only items that belong to that site can be added to the project. Otherwise, any item can be added to the project.
Ship To Location	Required (for RFQ creation)	The location to which the items in the project are to be shipped. You must specify the location to move the project into the Open lifecycle phase. The list of Ship To locations is determined by the setting for the Authorized Ship To property in your user profile. If your user profile does not specify any authorized Ship To locations, you won't be able to select a value for this field.

Field name	Constraint	Description
Project Currency	Required	The default currency used for calculations of the project revenues and expenditures. You can select the currency from the drop-down list. The project currency determines how other currency values (for example, price quotes entered by suppliers in an RFQ response) are normalized based on the system's currency exchange rate table. The default currency depends on the currency of the current user.
Product Lines	Optional	The product line(s) the project is associated with.
Number of Periods	Read-only	Number of effectivity periods selected on the first page of the Sourcing Project Creation Wizard.
Number of Qty Breaks	Read-only	The number of quantity breaks in the project.
Data to Share	Optional	The data to share with the suppliers in the RFQ. You can select the fields to expose to the supplier in the RFQ in the Data to Share with Suppliers window by clicking the button next to the Data to Share field.
Response Required Fields	Optional	The response information required from the suppliers for the RFQs. You can select the required fields from the Response Data Requirements window by clicking the button next to the Response Required Fields field.
Supplier Instructions	Optional	Instructions that will be communicated to suppliers on RFQs created from the project.
Owner	Required	The owner responsible for the project. Only the owner can create RFQs from the project. You can select the owner by clicking the button next to the Owner field.
Creator	Read-only	The creator of the project.
Created Date	Read-only	The date when the project was created.
Last Modified	Read-only	The date when the project information was last modified.
Project Type	Read-only	The type of the project. It is Sourcing Project by default.
Authorized Users	Optional	Users authorized to work with this project.
Disallow AML Statuses	Read-only	Specifies AML statuses for parts that you don't want brought into the project. Use this field to automatically filter out parts that are not preferred, discontinued, or are disqualified for some other reason.

Note The Project Number, Lifecycle Phase, Number of Periods, Number of Qty Breaks, Creator, Created Date, and Last Modified Date fields are updated automatically.

2. You may save the Project by clicking Finish to Add Items later. Or Click Next to Add Items. The *Add Items* page appears.
3. Continue to the next section.

Project Creation Wizard: Adding Items to the Project

1. On the Enter Sourcing Project Information page, Click Next. The *Add Items* page appears.
2. Click .
3. The *Add Project Items Wizard* appears.

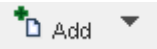
Note	When you hover the mouse on down arrow of this button, or Click on it, you get a drop down list of Create New..., Search or Import...
Note	The button stores the last action in its memory. For example, instead of clicking on the button, you selected Create New... from the drop down list, the next time you Click on the Add button, it will pop up *Specify Item Details* window.

4. Search for existing items using Basic or advanced Searches, or from Saved Searches or from Shortcuts. You can also create or import new items by selecting the Create New... or Import.. from the Add drop-down list.

   For information about searching or importing, see *Getting Started with Agile PLM* and *Agile Import Export Guide.*

   For information about using Create New..., see Creating Items in the Add Project Items Wizard (on page 22).
5. If you prefer, Click Finish to save the new project. Otherwise, Click Next to add attachments to the project. The *Add Attachments* page appears.
6. Continue to the next section.

Project Creation Wizard: Adding Attachments to the Project

1. Click  button to Add Files or Add URLs. Or Click Add > By Search... to search for file folders.

Note	When you Click on Add button, it pops up Add File... window by default.
Note	The button stores the last action in its memory. For example, instead of clicking on the button, you selected Add URLs... from the drop down list, the next time you Click on the Add button, it will pop up Add URLs... window.

2. Click Finish to display the General Information tab of the project.

Note	The specified project is created in the Draft state.

Specifying the Price Scenario

The two types of project price scenarios are Quantity Breaks and Effectivity Periods.

- Specify Quantity Breaks to capture prices based solely on quantities, such as for new products. You can determine how the cost of products might change based on different quantity scenarios. When you select the Quantity Breaks price scenario, you can capture prices for up to 6 Quantity Breaks.
- Specify Effectivity Periods to capture prices based on future dates, which helps you assess the cost of products for future time periods. The Effectivity Periods scenario also supports Quantity

Breaks per period, which lets you create mix of period and quantity scenarios. When you select the Effectivity Periods price scenario, you can capture prices for up to 20 price periods, and potentially 6 Quantity Breaks per period.

Quantity Break Example

The following table provides an example of the Quantity Breaks price scenario, using three quantity breaks.

Quantity breaks	Selected quantity breaks
500	X
200	X
100	X

Effectivity Period Examples

The following table provides an example of the Effectivity Periods price scenario, using four date periods and one quantity break per period.

Quantity breaks	01/01/05 to 03/31/05	04/01/05 to 06/30/05	07/01/05 to 09/30/05	10/01/05 to 12/31/05
500			X	
350				X
200		X		
100	X			

The following table gives an example of the Effectivity Periods price scenario, using four price periods and two quantity breaks per period.

Quantity breaks	01/01/05 to 03/31/05	04/01/05 to 06/30/05	07/01/05 to 09/30/05	10/01/05 to 12/31/05
500			X	X
350		X	X	X
200	X	X		
100	X			

Dates for Price Periods

Agile PCM uses no fixed calendar for its dates, so technically all price periods that you specify can have any start and end date. All effectivity dates are time-stamped at 12:00 P.M. GMT. When you publish prices to the system, you can see the effectivity dates as well as the time stamps.

When you create a new project, the Sourcing Projects Creation Wizard allows you to specify up to 20 price periods. However, there is no actual limit to the number of price periods in a project. If you

open a project and choose Actions> Modify Price Scenarios, you can add more than 20 periods.

Note	Modify Price Scenarios option appears in the Actions drop-down list only when the project has price periods. This option is not available when project is created with quantity breaks.

If you delete a price period, the period and any price information associated with it are removed. If the Auto Publish Quote History SmartRule is set to “Allow,” the system automatically creates Quote Histories when you delete a price period. For more information about SmartRules, see *Administrator Guide*.

Because there is no fixed calendar in Agile PCM, effectivity periods can overlap. However, if the Overlap Price Line Effectivity Periods SmartRule is set to “Disallow,” the system rejects any overlapping periods when you publish prices.

When you modify price scenarios, you can delete price periods or add new price periods before or after the existing range of price periods. For more information, see Modifying Price Scenarios (on page 24).

Creating a Project Using Save As

At times, you might want to create a project that requires the same general information and items as an existing project. To save time, search for the existing project and save it with a different name. Saving an existing project with different name saves the general information about the project, the items it includes, and any attachments to the project. The partners, RFQs, responses, response lines, and history are not saved.

To save a copy of a project:

1. Open the project you want to use as the basis for a new project.
2. Choose Actions > Save As. The *Save Sourcing Project As* window appears.
3. The next available number appears in the Number field. You can Click 123 to generate the next project number, or enter the project number.
4. Click Save.
5. Click Edit to modify the general project information. Click each tab in the project to verify and edit the information as needed.

Note	If a new project you create using Actions > Save As uses Effectivity Periods, you can modify the price scenarios. For more information, see Modifying Price Scenarios (on page 24).

Sharing a Project with Other Users

Sharing is how you define the people who have access to a project. When you share a project, you grant one or more of your roles to another Agile user or user group. The roles that you can share with a user include your own assigned roles and roles that have been shared with you by virtue of belonging to a user group. Any users or user groups you share a project with can perform actions permitted by the role(s) for that project only.

For general information about sharing Agile objects with other users, see *Getting Started with Agile*

PLM.

Note You cannot share those roles that have been shared with you by another user.

To share a project:

1. Open a project.
2. Choose Actions > Sharing. The *Access Control List: Share With Users* page appears.
3. Click Add. The *Add to Access Control List Wizard* with *Identify Users* page pops up.
4. Use the Filter By drop-down list in Find Users section to select All Users or All Groups or any other groups. Click Find button. The list of users/user groups appears in Available Users cell under Select Users section. You can select the users one by one or multiple users/user groups.

   You may type a user's name if you know exactly how it appears (in the system), but you have to select a group first to populate the Available Users list.

   The Save As Group button allows you to create a group of the users that appear in the Selected Users list. That process creates a new user group (personal or global) but does not add it to the Share list.
5. Click Next. The *Apply Roles* page appears. Select appropriate role or roles for your chosen users to have available in connection with the project and move them to the Selected Roles cell using the right arrow button.
6. Click Finish to return to the *Access Control List: Share with Users* page, which now displays the selected users and their selected roles.
7. Click Return. This returns you to the project.

Note To see the Access Control List for a project, choose Actions > Sharing again. The Access Control List shows the complete list of users who have access to the project.

To remove users from a project's Access Control List:

1. Open a project.
2. Choose Actions > Sharing. The *Access Control List: Share With Users* page appears.
3. Click the rows of users to remove.
4. Click Remove. Click OK in the caution window to confirm.

To see which objects have been shared with you:

1. Click Share tab in Tools > My Settings > User Profile.

   The Share tab lists the objects that have been shared with you by another user.
2. From your user profile, see if any objects have been shared with you via user groups. Click User Group tab. Click a desired group. Click on its Share tab.

   The Share tab lists the objects for which the group and all its users have been granted shared roles by another user.

BOM Filtering

The BOM filtering feature allows you to set up filters to selectively import the components in BOM

structures.

There are two specific uses for BOM filtering:

1. To Remove duplicated components

   You can selectively filter duplicate components out when importing items into PCM from PC.

   For example, you may have two BOM versions such as Prototype and Production that you want to combine into one single BOM. However, you can cost one specific version of the same BOM by using filters.

   This feature supports dual BOMs with part numbers that overlap.

   To combine two versions of a BOM, for example, a prototype BOM and a production BOM, and cost only one or the other, filter out the duplicate items. An example BOM in PC might have several duplicate items.

2. To Aggregate duplicate components

   To aggregate the duplicated components, the QPA (Quantity Per Assembly) attribute of the duplicated components are added together and the duplicate components are represented as a single item in the Sourcing Project.

To use BOM filters, you must first configure them in with the Java Client Admin tab. For procedural steps to set up the BOM filters, see “Configuring Product Cost Management” chapter in *Agile PLM Administrator Guide*.

Note	By default, duplicate components are overwritten. If you are using a smart rule in PC that enables BOM structure creation that allows duplicate components, you must configure PCM to allow the duplicate components to be imported.

When you import duplicate items from a PC BOM, and you want to filter out the replicated items, you need to configure the BOM component filters in the Sourcing Project Cover Page. Use the Admin tab in the Java Client to configure the BOM filters.

The filter will be inherited to top-level assemblies when the assemblies are imported into the source project from PC item master.

This behavior is similar to fields for Data to Share With Suppliers in an RFQ. The fields are configurable in the sourcing project in Java Client. Once an item is imported, the filter settings will be associated with that item.

Content update will use the filter settings that are used during the item import. These filter settings will be displayed in the sourcing project Item table. The project filters can be updated even after the items are imported.

Note	The settings affect only the future item imports and have no impact on the imported items.

The filter is updated through a special pop-up dialog that is similar to the controls of the Project AML and Analysis filters. During the import of the items in the Add Item Wizard, users are allowed to change the filter settings in the last step of the import. By default the filter settings inherit from the sourcing project filters.

Note	The Equals operator is the only option for BOM list attributes. You must select “Equal To” from the”Match If” drop-down list.

Importing BOM Components with Filters

You can set up filters to selectively import BOM components when you import items with the Add Project Items wizard. By default, when you import BOM components, any duplicate components are overwritten and produce inconsistent BOM structures.

How to use BOM filters:

1. Apply BOM filters during the import process using the Add Project Items Wizard. Use Search or Advanced Search and apply the BOM filter.
2. After item import, the filter will be associated with the item.
3. Content Update will use the filter settings that are used during the item import.
4. PCM retains the filter settings for the project. There is a BOM Filter field that shows up in the Add Project Items wizard.

5. BOM filter setting will be defaulted to the filter setting of the last import.
6. The pop-up edit control will only support the BOM List attributes with the Equal To operator.
7. Alternate filters can be applied to each new item added to a Single Sourcing Project.

When you import content to the item master, the publishing of the contents on the filtered items will be as if the BOM are defined as unique items and are imported into the item masters. You can import in either authoring or redline modes.

Authoring Mode

When you import in the authoring mode, the content will be updated with the filtered items and the other duplicated items will be removed from the content.

Redline Mode

When you import in the redline mode, the content will be updated with the redline-add of the filtered items and with the redline-remove of the duplicated items.

Duplicate Component Part Numbers

PC supports a smart rule that enables BOM structures to allow duplicate components. To import the duplicate components, you can either: filter out the duplicates, and import only one of each unique component part number; or you can aggregate the duplicate components and setup filters to mark the different BOMs with a specific filter name for each BOM version.

When the items are listed, there is a column for each BOM filter that shows item quantities. One usage example customers have set up their BOM structures to allow duplicate components.

Note	By default, these duplicated components are overwritten to allow the earliest IPN created to remain in the BOM.

To allow for duplicate components, you need to set up BOM attribute filters in Java Client using the Admin tab. For more detailed information on how to set up the BOM filters in Java Client, s*ee Agile Administrator Gu*ide.

After the BOM filter attributes are set up by the Administrator, you can set up BOM filters using the Add Item wizard.

Once the items are imported, filters will be associated with each item. Content update will use the settings that correspond with the previously set up filters that are used during the item import process.

If you are using a smart rule in PC that enables BOM structure creation that allow duplicate components, you must configure PCM to allow the duplicate components to be imported.

If you want to filter data brought into PCM from the value of the BOM data in PC, you need to configure BOM component filters in the sourcing project Cover Page. This filter will be inherited to top-level assemblies when the assemblies are imported into the source project from PC item master.

This behavior is similar to fields for Data to Share With Suppliers in an RFQ. These fields are configurable in the sourcing project in Java Client. Once the items are imported, the filter settings will be associated with the item.

Content update will use the filter settings that are used during the item import. The filter settings will also be displayed in the sourcing project Item table. The project filters can be updated even after the items are imported.

Note	Be aware that settings only affect the future item imports and have no impact on the imported items.

The filter is updated through a special pop-up dialog that is similar to the controls of the Project AML and Analysis filters. During the import of the items in the Add Item Wizard, users are allowed to change the filter settings in the last step of the import. By default the filter settings inherit from the sourcing project filters.

Note	BOM list attributes are supported only with Equals operators.

BOM Filter Examples

Example 1: No Filter Applied

If you create a Sourcing Project, add items from PC, and search for the duplicate items, the result is that duplicated items are arbitrarily deleted. Only the first instance of an item is retained.

Example 2: Apply a BOM Filter

Apply “Proto Load” filter, and only items with BOM list “Proto” and value of “Any” are displayed in the Web Client.

Configuring Project Tabs

On certain tabs in a sourcing project, you can select which fields to view to obtain better performance and meet your specific needs. Only the information in the selected fields will be visible. When you open these tabs for the first time after logging in, the *Display Configuration* window appears automatically. After that, reconfigure the tab display by clicking Configure Display.

You can configure the display of the following project tabs:

- AML
- Analysis
- Responses (in RFQs)

From the *Display Configuration* page, you can:

- Select the fields to appear on the tab
- Set the order of the fields
- Filter the information to display only the data Items and Response Lines

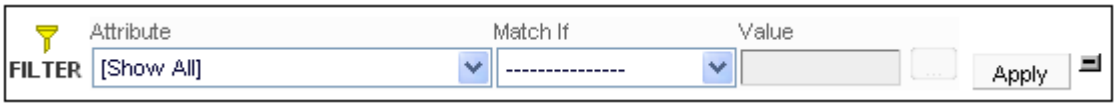
To configure the display of a project tab

1. Open a project and select one of the configurable tabs (AML, Analysis, or Responses tab of an RFQ). If the Display Configuration window doesn't appear, Click Configure Display.
2. Selecting Fields: On the Display Configuration page, select the fields that you want to view on the tab from the Available Attributes list. Click ➡ to move fields into the Selected Attributes list.
3. Sorting Fields: The order of the attributes in the Selected Attributes list is also the order in which they are displayed in the tab. To change the order of attributes, select an attribute in the Selected Attributes list, Click ⬆ to move it up or ⬇ to move it down.
4. Filtering Data: See Using the Filter Toolbar.
5. Click Continue to set the new display.

The attributes available for the AML, Analysis, and Responses tabs vary based on how your Agile PLM system has been configured.

Using the Filter Toolbar

1. Open a project and select one of the configurable tabs (AML, Analysis, or Responses tab of an RFQ).
2. Click Show Filter The Filter appears. It can be collapsed by clicking on "-" button next to Apply button.



   a. Select an attribute from Attribute drop-down list. The list also contains some pre-defined filters such as [Show All] and [Items not in an RFQ].
   b. Select an operator to use for the filter in the Match If drop-down list, and then specify a value in the Value field. An operator and a value are not needed if you selected a pre-defined filter such as [Show All] in the Attribute list.

   Note In the Match If drop-down list, the actions of operators Like and Not Like behave same as Equal To and Not Equal To, respectively.

Note Filters are specific to each tab and do not affect other tabs.

Adding Items to a Project

You can add items to projects when you create the project or later.

If you chose not to add items during the creation of a sourcing project, you can add them using one or more of the following methods

- Search and add items from the Item Master
- Import items from an external documents, such as an Excel Workbook or a text file. See Importing Item Data from a Spreadsheet (on page 21).
- Create New items

Note	You cannot create BOM in a sourcing project.

The new items created will not be automatically added in Item Master. You will need to use Publish in Items tab to update the Item Master.

When you change items, you also need to update the Item Master. For details, see Items ("Managing Project Items" on page 27).

To add items to an existing project:

1. Open a project and select the Items tab.
2. Click Items > Add > Search to pick and add items from Items Master. Or Click Items > Add > Create New... if you want to create new Items, be it a Part or a Document.The *Add Project Items Wizard* appears. For details, see Creating Items in the Add Project Items Wizard (on page 22).
3. Search for the existing items using basic, advanced, saved searches, or item bookmarks.

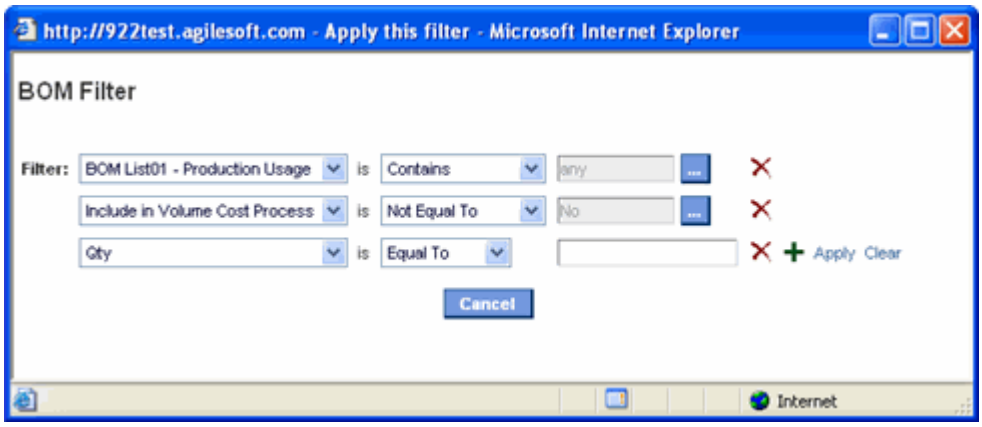
Adding Items with Filters

To add PC items to a sourcing project, use the BOM filters in the Add Project Items wizard.

Using the BOM filters with the Add Project Items wizard:

1. Open the Sourcing Project.
2. Click Items tab.
3. From the Items drop-down menu select Add > Search. The *Add Project Items Wizard* window opens.

4. Click ... next to the BOM Filter field below Selected cell to open the *BOM Filter* window.



5. Select a filter in the Filter: drop-down list.
6. Select an operator in the Match If drop-down list.
7. Click ... to select a Value

   Note The ... button does not appear when you are required to input a value.

8. Click + to add more filter criterion.
9. Click Apply.

   You will see your BOM Filter listed in the BOM Filter field in the Add Project Items Wizard page.Now your searched Items will automatically be filtered and listed in the Selected cell. You can also apply the filters after you have searched the items.

   Note Click X to remove a particular filter; Click Clear to remove all the filters

Note To use filters, you must search for the item that was recently added. Create New... and Import options *do not support* BOM filtering in the Add Project Items wizard. Only Search and Advanced Search options support BOM filters.

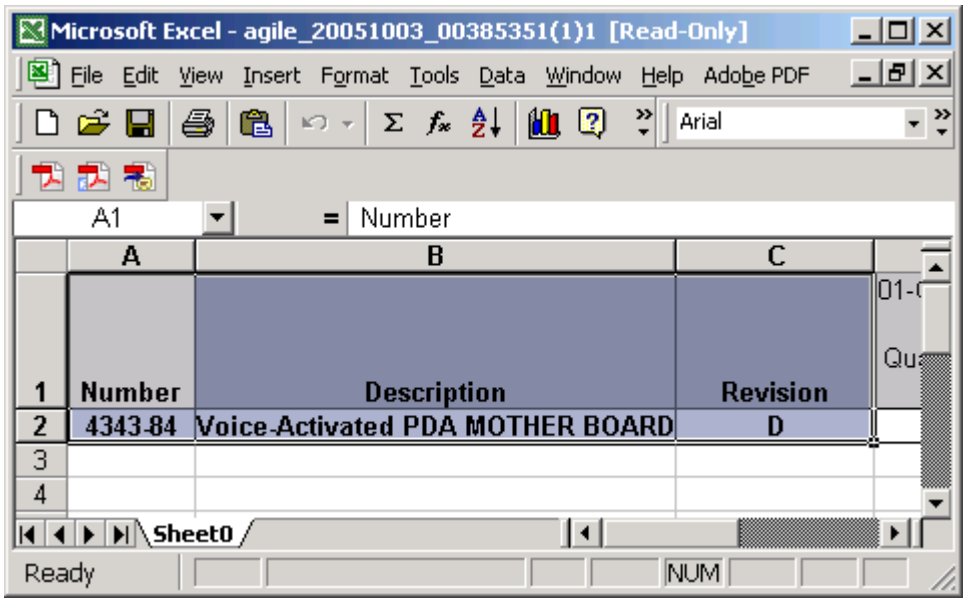
Importing Item Data from a Spreadsheet

You can import item data into a Sourcing Project in XLS format.

To import an XLS spreadsheet into a Sourcing Project:

1. Open the Sourcing Project.
2. Under the Items tab, select Items > Import.
3. Under File type, select Excel Worksheet.
4. Select the *Project Item Only* option.
5. The forecast information will show up in the sourcing project.

Note	Make sure that the spreadsheet contains the correct item number with the current revision letter or number. Otherwise, there will be import errors. For example, in the figure below, notice the spreadsheet has a Revision letter in Column C.



After the import is complete, you should see the revision number or letter populated in the Sourcing Control under the Revision column.

Creating Items in the Add Project Items Wizard

You can create items in the project in the Add Project Items Wizard. Items created in the wizard are not published to the Item Master automatically. However, you can publish them later. See Publishing Items and Manufacturer Parts (on page 44)

Note	You cannot add BOMs to items created in the project.

To Create New Items:

See Creating New Items in a Project (on page 28)

Selecting Data to Share with Suppliers

You can decide on the data about the project that you want to share with suppliers. You can restrict the information visible to the supplier in the RFQ. Suppliers will respond only to the information visible to them.

You can use the Data to Share with Suppliers window to restrict the visibility of information to the supplier.

The types of data to share include:

- Cover Page fields
- Item and AML fields (including AML split percentages)
- Other information (BOM view, RFQ attachments, and item and manufacturer part attachments, and other information)

Note	You can modify these fields at a later time by editing the information in the Project General Information tab. Changes in Data To Share attributes will be reflected in all new RFQs created in the future from the project. You can also modify the RFQ CoverPage tab (to apply to an RFQ only).

To select data to share with suppliers:

1. Open a project and go to General Information tab.
2. Click Edit.
3. Click ... next to the Data to Share field. The Data to Share With Suppliers window appears.
4. Select the checkboxes next to the fields and other information to make them visible to the supplier in the RFQ.

Note	You can restrict the visibility of internal part numbers and internal part information by clearing the IPN Info checkbox in the Items & AML Fields section. Doing so makes the BOM invisible to suppliers receiving RFQs for this project. However, if no AML is associated with a given IPN, suppliers can still view part of the IPN information so that they can respond to the RFQ.

5. Click Save.

Note	Partners and Suppliers can view the BOM structure and Costed BOM only if the BOM View is shared with them. There is no difference between Suppliers and Partners in Agile PCM 9.2, except for Assemblies with AMLs. This lets the supplier not only view the BOM structure, but also review a costed BOM before submitting a response.

Updating Project Content from the Item Master

You can update the content of the project with information about the latest revisions. For example, your manufacturing division might have added a part in an assembly in the Item Master, and you may have the older version of the assembly in the project. You can update the assembly with the part in the Item Master on the Items tab of the Project page. You can specify to update all BOMs, AMLs, and item and manufacturer part information, or just specific attributes, such as standard cost.

Note	If the project content update includes new components in assemblies, be sure to calculate new quantities after you do the update.

The content update modifies the attributes of selected objects as follows:

- BOM — Updates the BOM structure (additions or deletions), quantity requirement per assembly, and part revisions.
- AML — Maintains AML attributes you changed, or resets all attributes to Item Master values.
- Item attributes — Updates by selected attributes, including description, commodity, unit of

measure, standard cost, custom part, and any flex fields that appear.

- Manufacturer part attributes — Updates descriptions and any flex fields that appear.

Note	Target cost is not present in Item Attributes in Content Update pop up. To update Target Cost, the user must opt for updating all objects. This is the only item attribute that cannot be selectively updated.

To update project content:

1. Open a project and go to Items tab.
2. Choose Items > Update From Item Master. A caution window appears.
3. Click OK to update the content. The *Content Update* window appears.
4. Select the Update All Objects button to update all the objects associated in the project, or select the Update Objects button and select the attributes manually.
5. Click Save. The update is applied.
6. To view the update, Click the Changes tab and select Views > Items.

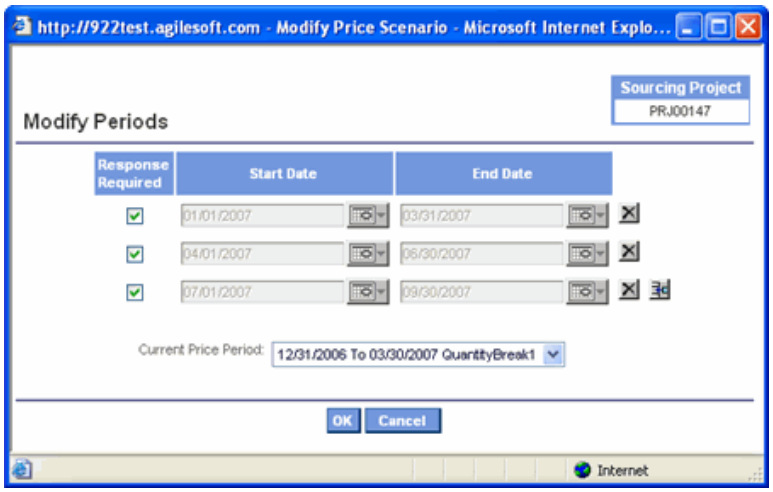
Modifying Price Scenarios

When a project uses the Effectivity Periods price scenario, you can remove old price periods, add new ones, and reset the current period. A notification lets you know when the current price period is about to expire so you can add new ones.

Note	You cannot change the set price scenario for a project. If you want to change from a price period–based to a quantity-based scenario, you need to create a new project.

To modify price periods:

1. Open a project.
2. From any tab, choose Actions > Modify Price Scenarios. The *Modify Periods* window appears.



Note	The Modify Price Scenario command does not appear on the Actions menu if there are no price periods in the project.

3. To delete a price period, Click the Delete Row button to the right of a period's end date.
4. To insert a new price period, Click the Insert Row button to the right of the last period's end date. Although the period is added after the last period in the project, you can specify any start date or end date.
5. To Make a price scenario required for supplier response check the Response Required box. By leaving the Response Required check box blank, users are providing the supplier the freedom to respond or not respond to the specified price scenario(s).

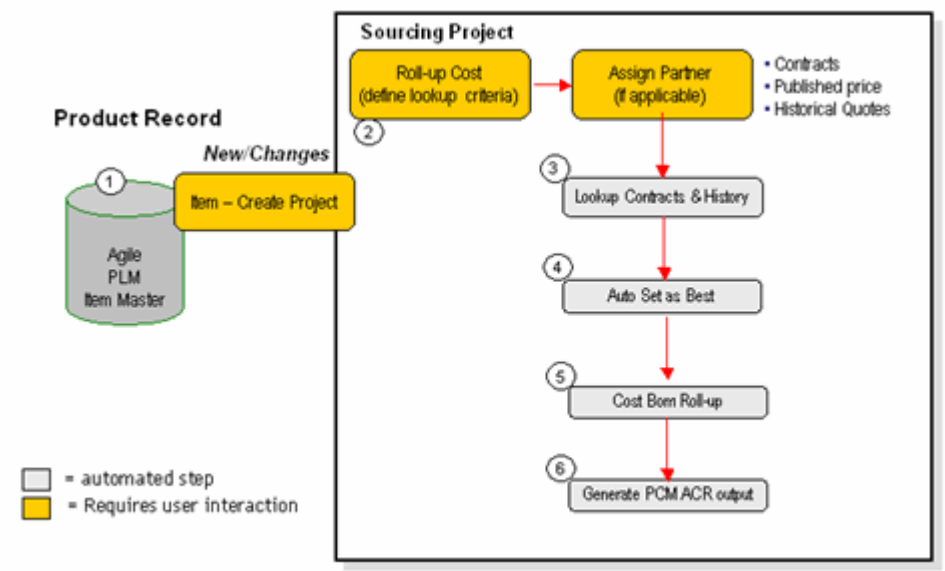
Note	If you are modifying the current price period for analysis purposes only, be sure to change it back before creating any new RFQs for the project.

6. Click OK to confirm the changes.

Quickstep to Costed BOM

Non PCM users, such as Engineering, Marketing, Finance, NPI Teams, etc., require an intuitive mechanism to cost a BOM without going through PCM steps. This can be done using Actions > Rollup Cost... function.

Rollup cost generates an Assembly Cost Report based on available prices using automated background processes. It picks up lowest costs from filtered data, performs Set as Best (on user defined or default parameters) and performs costed BOM rollup (aggregation) to generate an ACR.



To Rollup Cost

1. Search and select a Sourcing Project or create a new one.

2. Once in project (in any of the tabs), Click Actions > Rollup Cost...

In the Run Rollup Cost Report

In the *Run Rollup Cost Report* screen, you can opt for either the existing prices available in a sourcing project or the latest prices that have been published in Items Master.

If you opt for Latest prices -

1. Click ... next to Price Types field to select one or more available values.

   This features helps you base your BOM costing for varying sourcing situations, such as temporary requirements.

2. Click ... next to Suppliers field to select a supplier.

Note	To distinguish suppliers, see Supplier Identification (on page 97).

   This option is useful when, for example, you want to source items from a supplier closer to Ship To location.

Note	Should you want to include Partners in the project costs, you must add them to Item(s) under Items tab. See Adding Partners to Project Items (on page 34).

3. You may specify the rest of parameters or use default settings.
4. Click Finish to generate the report.

Note	Time taken for report generation depends upon the size of project. It is advisable to run it as a background process by clicking on *Generate this report as a background process* checkbox.

Other Project Actions

Earlier in this chapter we described how to use the Sharing and Save As actions, which both appear on the Actions menu. The Actions menu for projects also includes the following commands:

Bookmark — Save a bookmark so that you can return to the project quickly. To see bookmarks you've saved in an Agile client, open the My Bookmarks folder.

Subscribe — Subscribe to the project and consequently receive notification of events that happen to that object.

Delete — Deletes the project. You can delete a project at any lifecycle phase (Draft, Open, or Closed). Deleting a project does not in any way affect the product record.

Send — Sends an email message containing a link to the project. You can send a project to any user listed in the Agile PLM address book.

For more information on how to perform these actions, see *Getting Started with Agile PLM*.

Chapter 3

Managing Project Items

This chapter includes the following:

- About Project Items 27
- Managing Project Items 27
- Quote As and Cost Attributes 33
- Expanding an Assembly 33
- Managing Partner Information for Items 34

About Project Items

You add items to a project so you can get information about terms and prices from your suppliers based on the quantities required. You can add items that exist in the Item Master, and you can create items within the project. The items created in the project are not updated to the Item Master automatically. You have to manually publish the item information to the Item Master.

When you add an item to a project, all the sub-components and manufacturer parts are added to the project by default. An assembly item is any item that has a BOM.

Unlike the Item Master, sourcing projects hold only one revision of an item. When you import items into a project, any existing items are replaced with the source data even if it is for a previous revision.

The information you require about an item can be sent as a request for quotes (RFQ) to suppliers. Updated prices that you receive from suppliers can be published to the Item Master.

Managing Project Items

You can add, create, import, view, and delete items in the project. You can also set the critical quote and cost attributes of items for a response.

This section contains the following topics:

- Adding Existing Items to a Project
- Creating New Items in a Project
- Importing Items into a Project
- Exporting Items from a Project
- Editing Item Information
- Modifying Item Quantities
- Updating Project Item Information

- Calculating Item Quantities
- Viewing Item Information
- Deleting Items from a Project

Adding Existing Items to a Project

You can add items to a project when you create the project, or you can add them later. Use the following method to add items that exist in the Item Master.

To add items to a project:

1. Open a project and select the Items tab.
2. Click Items > Add > Search. The *Add Project Items Wizard* appears.
3. Select the item(s) in the search results window to add them to the project.
4. Click OK. The items are added to your project.

Creating New Items in a Project

You can create items to add to a project when you create the project or later. When you create a new item, it is not automatically added to the Item Master. However, you can publish the item to the Item Master. For more information, see Publishing Items and Manufacturer Parts (on page 44).

To create items in a project:

1. In a project, go to the Items tab.
2. Select Items > Add > Create New... The *Add Project Items Wizard* with *Specify Item Details* page appears.
3. Select the object type from the Type drop-down list. An item object can be either a part or a document.

Note	You do not need to specify a number; a unique identifier is created automatically for the item in the Number field based on which subclass you selected.

4. Enter the revision number (if any) of the item. A revision is a change in the item specification.

Note	An item with the same number can have multiple revisions in it. Each revision will have a change in its content.

5. Enter the description of the item in the Description field.
6. Select a commodity from the drop-down list.
7. Click next to the Product Lines field, and select from the Available Values list.
8. Enter the standard cost of the item, and select the currency from the drop-down list.

Note	The standard cost of the item is site-specific.

9. Click Next. The *Add AML* page appears.

To add AML information on the Add AML page:

1. Click ... next to the Manufacturer Name field, and search for the manufacturer you want.
2. Enter the manufacturer's number for this part in the Manufacturer Part Number field.
3. Enter a description of the manufacturer part.
4. Select the status of the AML from the Status drop-down list.
5. Click Add.
6. Click Finish. The item is listed on the Items tab.

Importing Items into a Project

You can import items into a project when you create the project or later. Items imported into a project are not automatically added to the Item Master. However, you can publish items to the Item Master. For more information, see Publishing Items and Manufacturer Parts (on page 44)

You can't add duplicate top-level assembly items to a project. An assembly is any item that has a BOM. Each project can have multiple top-level assemblies as long as they are unique. The item number alone determines an item's uniqueness.

However, If the smart rule DuplicateItemNumbers has been set to Allow, the Quantities (QPA) of the duplicated items will be aggregated into a single item within each affected assembly.

To import items into a project:

1. In a project, go to the Items tab.
2. Choose Items > Import.... The *Import Wizard* with Import Source page appears.

   For complete information about how to import items into a project, see *Agile Import Export Guide*.

Note	You must have the appropriate privileges to import objects.

Exporting Items from a Project

After you add items to a project, you may want to edit the item fields. Rather than editing each item individually, you may find it easier and more efficient to export project items and edit the exported document. After you edit the file, you can import the revised items back into the project. See Importing Items into a Project (on page 29).

Note	Some exported item fields, such as State and Is Validated, are not useful. Do not map such fields when you import the data into a project.

To export project items:

1. Open a project and select the Items tab.
2. Choose Items > Export(CSV)... or Export(Excel)... The *Download File* window appears.

   CSV is Comma Separated Values format, where a comma is used as an identifier of table columns. So that, when you import a CSV file, Agile PLM will place the data into its appropriate columns.

3. Save the file to your computer.
4. Click Close in the download window to return to project

Editing Item Information

You can edit item information, such as the commodity, description, unit of measure, buyer, and planner, at any time.

To edit item information:

1. Open a project and select the Items tab.
2. Click the Number of the item you want to edit. The *Project Item Information* page appears.
3. Click Edit.
4. Edit the information in the fields as necessary.
5. Click Save.

Note	The item information edited on the Project Item Information page does not affect the Item Master. You can view the Item Master details by clicking View in Item Master.

Modifying Item Quantities

You can edit item quantities, or quantity breaks, on the Items tab.

To modify quantity breaks:

1. Open a project and select the Items tab.
2. Select the row(s) of Item(s) or use Global Select button to select all the rows.

Note	Although the Global Select button selects all the Items across all the pages, the Enter Quantities page after you choose Items > Edit Quantities displays the Items of current page only. Once you Click Finish after editing the quantities, it returns you to back to the same page. To edit the Items of next page(s), you are required to Edit Quantities page by page. The Global Select continues to remain active, thus keeping all the Items in every page selected.

3. Choose Items > Edit Quantities. The *Enter Quantities* page appears.
4. Enter the quantity in the field for each Quantity Break in each Effectivity Period.

   You can use the Fill Right button in the column header to fill the value of a Quantity Break to all the next Quantity Breaks.

   You may use Fill Above/Below buttons next to a Quantity to fill its values in Quantities of all the selected rows above or below the current row.
5. Click Finish to update the quantities in the project.

Note	Make sure the Calculate Quantities through sub-assemblies and components checkbox is selected. If the checkbox is cleared, the quantities will not be updated for the project items.

Updating Project Item Information

Sometimes item information changes due to Engineering Change Order (ECO). You can update the items in a project with the information available in the Item Master.

To update project item information:

1. Open a project and select the Items tab.
2. Choose Items > Update From Item Master. For more information, see Updating Project Content from the Item Master (on page 23).

Calculating Item Quantities

When an item is added to a project, whether it's entered manually or imported, its BOM and the associated manufacturer parts are also added. An item may contain many sub-components. Any item that has a BOM is called an assembly. Each assembly has a specified quantity. When an assembly is quoted for a specific quantity, the quote includes quantities for all its sub-components.

Within a sourcing project, you specify quantities only for top-level assemblies, not for BOM components. However, you can calculate component level quantities based on the assembly quantities and the Quantity Per Assembly (QPA) specified for each component. The project aggregates the quantities across assemblies for common items. If partner splits have been specified, the project also applies the splits to the calculated quantities.

At the top of the Items and AML tabs, it shows the date and time when quantities were last calculated. When the calculated date and time is red, you need to Click to recalculate quantities.

Note: If you choose Items > Edit Quantities to change quantities, you can check the box named Calculate quantities through sub-assemblies and components to calculate quantities. Calculated quantities affect the items only in the project, not items in other projects or in the Item Master.

The following table shows a portion of a BOM. Assembly A1 has a Quantity of 1000. Two Suppliers, S1 and S2, have been assigned to the assembly with percentage splits of 60% and 40%, respectively. When you calculate the quantities for sub-components P2, P3, and P4, the results are shown in the following table.

Number	QPA	Quantity	Suppliers / Splits	
			S1 (60%)	S2 (40%)
A1	1	1000	600	400
P2	1		600	400
P3	2		1200	800
P4	3		1800	1200

The calculation is fairly simple. For example, the following formula is used to calculate the quantity of P4:

[Quantity of P4] = [QPA of P4] * [QPA of A1] * [Quantity of A1]

[Quantity of P4] = 3 * 1 * 1000 = 3000

To find quantities for each partner assigned to a sub-component, the total quantity for the sub-component is multiplied by the split percentage:

[Quantity of P4 for S1] = 3000 * 0.60 = 1800

[Quantity of P4 for S2] = 3000 * 0.40 = 1200

To view sub-component quantities:

1. Open a project and select the Items tab.
2. Click to calculate quantities for all BOM components.

Viewing Item Information

You can view item information from the Item Master or the project. Any change to an item at the project level will not be reflected in the Item master, whereas changes in the Item Master affect the project items when you update the item content in the project.

For example, if you set a target price for an item by editing the item at the project level, it differs from the target price information stored in the Item Master.

Note	You can also view item information using the search function in the navigation pane or using an item bookmark. For details, see *Getting Started with Agile PLM*.

To view item information from a project:

1. Open a project and select the Items tab. The items are listed.
2. Click an item Number to view the details of the item on the Project Item Information page.

Note	You can view the item information in the Item Master by clicking View in Item Master on the Project Item Information page.

To view item information from an RFQ:

1. Open an RFQ and select the Responses tab. The BOM of the RFQ page appears.
2. Click an item Number to view the details of the item on the Project Item Information page.

Deleting Items from a Project

You delete items from a project to eliminate items that were added or imported by mistake or are now obsolete. You can delete an item from a project at any time, as long as it is not a sub-item within a BOM structure. You cannot change the BOM structure within Agile PCM. When you delete an item from a project, it is removed from all RFQs in the project.

Deleting an item from a project does not affect the Item Master. If the item was published, it still exists in the Item Master even after deletion.

To delete items from a project:

1. Open a project and select the Items tab.

2. Select the item you want to delete.
3. Choose Items > Remove. A message appears for you to confirm the deletion of the items.
4. Click OK to delete the selected items. The items are removed from the items list and from all RFQs in the project.

Quote As and Cost Attributes

When you send RFQs, you can seek Quotes of an item as an assembly, component, or custom component. These are the Quote As options available in the sourcing project for items. The price information for the items depends on the Quote As and Cost attributes.

- Cost defines whether the specified item will have a price in the quote project.
  - Yes: If you select Yes, a response line will be created for the item.
  - No: If you select No, no response line is created for the item or its associated manufacturer parts, and so the supplier cannot quote a price.
- Quote As defines the response line in the RFQ. material price and non-material price of the items in the response lines.
  - Assembly: If an item is quoted as an assembly, the supplier specifies only the non-material price for the item in the response line. Non-material price is the price that includes the labor rate, sales tax, and other overheads.
  - Component: If an item is quoted as a component, the supplier specifies only the material prices in the response line.
  - Custom Component: If an item is quoted as a custom component, the supplier specifies both the material and the non-material price in the response line.

The Quote As and Cost attributes are site-specific and are specified when the item is created. You can change the attribute information in the project later.

To change the Quote As and Cost attribute information of an item in the project:

Note	Once a RFQ is created for an item, the Quote As and Cost attributes cannot be edited or changed.

1. Open a project and select the AML tab.
2. Select the row(s) of the item(s) for which you want to change the Quote As and Cost attribute information.
3. Choose Items > Edit. The *Edit Project Items Wizard* appears.
4. Change the attributes as necessary.
5. Click if you selected multiple items, or Click Finish.

Note	You can change these attribute values from Items and Analysis tabs, as well.

Expanding an Assembly

Assemblies and parts make up a bill of material (BOM). An assembly can contain items and subassemblies. An assembly is denoted by in Agile PCM.

To expand an assembly:

1. Open a project and select the Items tab. The BOM of the project appears.
2. Click + next to the icon to expand the assembly, or select the row(s) of the assembly and choose Items > Expand BOM. The subitems are displayed.

Note	Choosing Items > Expand BOM expands all the assemblies and subassemblies associated with the item, whereas clicking the + next to the icon expands only that particular assembly.

The manufacturer part information is not displayed on the Items tab when you expand the BOM.

Managing Partner Information for Items

Partners can view complete project BOMs, whereas suppliers can view only the information about assigned items in an RFQ. Partners can also view the BOM Items present in the RFQ only if the BOM View is shared to them. You can assign partners to an item in the project when you add the item to the RFQ that will be sent to the partners. However, you can avoid sending the RFQ to partners when you assign suppliers to the RFQ items.

If multiple partners are selected, you can split the quantity among the partners by specifying what percentage of the items you want to receive from each supplier. For example, if you require 100 ship anchors, and two partners supply ship anchors to you, you can add both partners to the list and assign 50% to each.

You can select the BOM View checkbox in the Data to Share With Suppliers window to make the project BOM visible to the partner (on the General Information tab of a project, Click the button next to the Data to Share field). When you let partners view the BOM, the partners can also do a costed BOM analysis before submitting their responses.

Note	If you have not added partners to your project, no partners appear on the Select Suppliers page during RFQ creation.

Adding Partners to Project Items

You can add partners to items in the project. You can assign the partners to all the items in the RFQ.

To add partners to projects:

1. Open a project and go to the Items tab.
2. Select the row(s) of the item(s) to which you want to add partners.
3. Choose Partners > Add/Modify. The *Assign Partners Wizard* appears.
4. Click Add/Remove Partners. A selection list appears.
5. Select the suppliers in the Available Partners list, and Click to add them to the Selected Partners list.
6. Click OK. The partners appear in the Partner/Supplier list.

7. Enter the Quantity Split percentage for each partner.
8. Select the Apply to all Remaining Selected Items checkbox to assign the partner and split percentage information to all the selected items in the project.
9. Click Finish. The partners appear in the Partner/Supplier list.

Note You can also add partners and specify their AML splits from a project's AML tab. However, to display the partner splits on the AML tab, you must configure the tab's display properly. For more information, see Configuring Project Tabs (on page 18).

Removing Partners from Project Items

You can remove partners from selected items in a project. When you remove the partners, the suppliers still appear in the Available Suppliers list during RFQ creation.

Note When you delete the partners for an open RFQ, all the partner names are listed on the RFQ's Responses tab because the RFQs were sent to the suppliers when the state of the RFQ is changed from Draft to Open.

To remove partners:

1. Open a project and select the Items tab.
2. Select the row(s) of the items for which you want to remove partners.
3. Choose Partners > Add/Modify. The Assign Partners Wizard appears.
4. Click Add/Remove Partners. A selection list appears.
5. Select the suppliers to be removed, and Click ⬅ to remove them from the Selected Partners list.
6. Click OK.
7. Modify the split percentage for the remaining suppliers (if applicable).
8. Select the Apply to all Remaining Selected Items checkbox to assign the partner and split percentage information to all the selected items in the project.
9. Click Finish.

Chapter 4

Project AMLs

This chapter includes the following:

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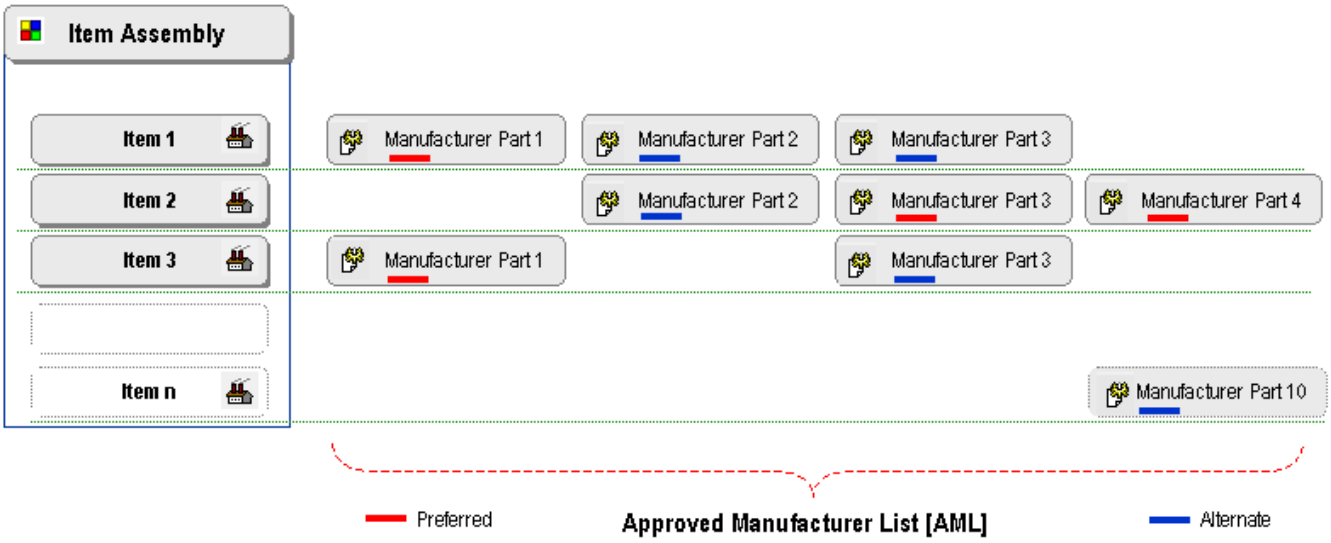
About Project AMLs

An AML is the Approved Manufacturer List for an item. It lists all of the preferred or alternate manufacturer parts that correspond to an internal part. When you source parts for a project, you can choose to source them by assembly, by AML, or both.



An AML can have preferred or alternate manufacturer parts. For each internal item, there can be multiple manufacturer parts. In such cases, you can specify AML percentage splits. For example, you may want use 70% of one manufacturer part and 30% of another, based on cost or availability.

Manufacturers listed in a project AML must already exist in the Item Master. You can validate both project manufacturers and manufacturer parts, correctly matching the information to objects in your system. After performing cleanup of project AMLs, you can publish them to the Item Master.

Show or Hide AML

The AMLs of an Item can be viewed, added, deleted or modified in AML tab. A + sign before an Item indicates that it has AML(s).

In a sourcing project, business decisions are usually based on Items data, and not on manufacturer parts data. For this reason, the AML(s) of an Item are not displayed by default. Moreover, working on large list of Items, some of which may have AMLs, often affects system performance.

You can view the AMLs by clicking on + sign of the desired Items, selectively. To view AMLs of all the Items across the entire list in one go, Click Show AML button. Upon display, this button automatically turns to Hide AML, thus enabling you to hide all the AMLs across the entire list with just one Click.

Editing Item Attributes

The approved manufacturers list shows all manufacturer parts at the lowest internal part number across all bills of material and assemblies in this project. You can edit the item attributes such as Quote As and Cost on the AML tab to get the responses you need from the supplier. The Quote As and Cost attributes are site-specific.

The Quote As and Cost of the item define the RFQ response object. For more information, see Quote As and Cost Attributes (on page 33).

Bulk Editing

When you need to make a universal change in certain visible attributes, such as Cost, Make/buy or Quote As, across the entire list of Items or a set of select Items, you may Bulk Edit them.

1. In a Sourcing Project, Click on AML tab.
2. Select the desired row(s) of Items or all the rows on displayed page or all the pages.
3. Click on Bulk Edit in Items drop-down Menu. It opens up *Bulk Edit* window.
4. Pick an Attribute under Fields drop-down list and a value from corresponding Value drop-down list.
5. If you want to change more attributes, Click on Add to open up more Field and Value rows.

Filtering AML Data

In a Project AML, you can purge out AML data across any Attribute and its desired values using the Filter toolbar. This toolbar also facilitates use of Predefined Filters, such as *[Items not in an RFQ]*.

Numeric data can be filtered using advanced numeric operators, such as, *"Less than or Equal to"*, *"Is Not Null"*, and more, thus allowing you to apply numeric values to relevant Attributes.

To filter AML Data in a project:

1. Open a project and Click the AML tab.
2. Click Show Filter.
3. Click the Attribute drop-down list and select one of the Attributes or Predefined Filters.
4. If you select a predefined filter, Click Apply. The other fields, *Match if* and *Value*, get redundant when you select a predefined filter.
5. If you select an attribute instead of a predefined filter:
   a. Click the Match If drop-down list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected.
   b. Select a value for the filter criteria. For text attributes, type a value. For list attributes, Click ... to select a single or multiple values from available values list.
   c. Click Apply.

Adding an AML to Items

Each project item can have multiple manufacturer parts, and you can specify percentage splits to use for those parts. An AML represents a manufacturer part made by a particular manufacturer. You can add AMLs to an item by specifying a manufacturer part, manufacturer, and its AML status (Preferred or Alternate).

When you add an AML, the manufacturer you specify must exist in your system. Otherwise, the AML will be invalid and you won't be able to quote on it. Manufacturer parts, on the other hand, do not have to exist in your system; you can publish them to the Item Master later.

To add an AML to an item:

You can add an AML to items in three ways:

- Manually
- By importing
- By updating the project with data from the Item Master

Note	For information about updating the project with data from the Item Master, see Updating Project Content from the Item Master (on page 23).

1. Open a project and select the AML tab.
2. Select the row(s) of the item(s) to which you want to add the AML. Continue with the following procedure.

To add an AML to a project item manually:

1. Choose AML > Add/Modify... > Manual. The *Add AML Wizard* appears.
2. Click Add. The *Add AML for Item* window appears.
3. Click ... next to the Manufacturer Name field. The *Identify Manufacturer* window appears.
4. Enter the search criteria and Click Search. The search results appear.
5. Move the required manufacturers from Results cell to the Selected cell. Click OK. The manufacturer name appears in the Manufacturer Name field in the Add AML for Item window.
6. Enter the manufacturer part number and description in the corresponding fields.
7. Select the status of the AML (Preferred or Alternate) from the Status drop-down list, and Click Add. The manufacturer and part information appear in the *Add AML Wizard* table.
8. Change the AML status and split percentage in the corresponding fields, as necessary.
9. Click Finish.

Note	If the manufacturer part information is not available in the Item Master, an error symbol ! appears in the Number field on the project AML tab. Click the error symbol to search for the existing manufacturer part information.

Importing AML Data

Using Agile PCM, it is easy to import manufacturer information, manufacturer part numbers, and commodity codes to add an AML row for an IPN. The Import wizard walks you through the steps to import AML data.

You can import AML data into the Item Master or directly into a project, depending on your specific business process. If you import AML data directly into a project, it is not automatically added to the Item Master.

For complete information about how to import AML data, see *Agile Import Export Guide*.

Note	AML data often needs validation after it is imported into projects. A ? symbol indicates the data that needs to be validated.

Retrieving AML Data from the Item Master

The AML data for an project item may have been updated in the Item Master. At any time, you can retrieve AML data from the Item Master into a project.

To retrieve an AML from the Item Master:

1. Open a project and go to the AML tab.

2. Select one or more items.
3. Chose AML > Add/Modify... > Retrieve from Item Master.

   It opens up *Retrieve AML Content from Item Master* window, which facilitates you to “Update AML attributes from Item Master” and/or “Add/Delete AML content from Item Master”. The checkboxes enable you to select “Update Options” and/or “Overwrite Project Changes”, thus bringing forth 4 combinations:

   a. Update AML attributes from Item Master

      The system updates only those AMLs and Manufacturer Parts that have not been modified by the buyer. If, however, buyer has modified the AML Split of a Manufacturer Part, then only Mfr Part attributes, such as Description, flex fields, etc. will be updated, not the AML Split & AML Status.

   b. Update AML attributes from Item Master + Overwrite Project Changes

      The system updates existing AML attributes, i.e., AML Splits & AML Status, besides updating Manufacturer Part attributes, such as, Manufacturer Part flex fields, Description, etc.

   c. Add/Delete AML content from Item Master
      - AMLs added in the PC are brought into the Project.
      - AMLs deleted in the PC are deleted from the Project also, even if any of these AMLs were updated by the buyer.
      - AMLs added ‘only’ in the Project, and not in the PC, are retained.
      - AMLs deleted ‘only’ from the Project, and not in the PC, will not be added again.

   d. Add/Delete AML content from Item Master + Overwrite Project Changes
      - AMLs added in the PC are brought into the Project
      - AMLs deleted in the PC are deleted from the Project also, even if any of these AMLs were updated by the buyer.
      - AMLs added ‘only’ in the Project, and not in the PC, are removed.
      - AMLs deleted ‘only’ from the Project, and not in the PC, will remain deleted, ‘unless’ they come again as part of PC.

Calculating Item Quantities on the AML Tab

At the top of the Items and AML tabs, it shows the date and time when quantities were last calculated. When the calculated date and time is red, you need to Click to recalculate quantities.

If you import data, add AML rows, or change AML split percentages, you should recalculate quantities. For more information, see Calculating Item Quantities (on page 31).

Deleting an AML Row

You can delete AML rows of the item in the project.

To delete AML rows:

1. Open a project and go to the AML tab.
2. Select the row(s) of the item(s) whose AMLs you want to delete
3. Choose AML > Add/Modify... > Manual. The *Add AML Wizard* appears with AML table.

4. Select the row(s) of the AMLs you want to delete.
5. Click Remove. Click OK to confirm that you want to remove the row.
6. Adjust the AML split percentage, if necessary. Click Finish.

Note	You can also delete an AML by using the Delete AML in AML drop down list option.

Validating Manufacturer Names

Validating is the process of checking the existence of the manufacturer in the Item Master. Validating can be useful when manufacturers are imported from an external source. For example, after importing data into a project, you need to validate it manually. A ? symbol appears next to the manufacturer names that you need to validate. First you attempt to validate all similar items in a batch. Manually entered manufacturers are validated automatically.

After you have validated a group of imported manufacturers against the Item Master, a ! symbol appears beside each item that you need to validate individually.

Note	If the Supplier proposed MFR exists in the IM, and you validate the MFR & MFR part once; the MFR will be shown as valid, no need to create a new MFR.

To validate manufacturer names:

1. Open a project and go to the AML tab.
2. Select the row(s) of the AML(s) you want to validate.
3. Click Validate. If the information is in the Item Master, the validation is successful.
4. Click the ! symbol next to the manufacturer name. The *Identify Manufacturer* window appears.
5. Select a method to search for an existing manufacturer. You can type a manufacturer name, or use an advanced search, a saved search, or an item bookmark. Click <search>
6. Select the manufacturers from the search results.
7. Click Finish.

Validating Manufacturer Part Numbers

At times, you may require a new manufacturer part number for an item in a specific project. You can enter the new manufacturer part number while adding the AML row to the item. You can validate the MPNs against the MPNs in the Item Master. The invalid MPNs (the MPNs not found in the Item Master) are identified and marked by a ! . You can Click the icon to change the information. The new manufacturer part number is marked by a ! because it does not yet exist in the Item Master.

To validate MPNs:

1. Open a project and go to the AML tab.
2. Select the row(s) of the AML(s) that you need to validate.

3. Click Validate. If the information is in the Item Master, the validation is successful. If the validation is not successful for any of the selected manufacturer part numbers, proceed to step 5.
4. Click the ! symbol next to the manufacturer part number. The *Identify Manufacturer Parts* window appears.
5. Select a method to search for an existing manufacturer part. You can type a manufacturer name, or use an advanced search, a saved search, or an item bookmark. Click Search
6. Select the matching manufacturer part from the search results.
7. To apply all instances of the manufacturer part number to this manufacturer part, select the Apply to all instances of this Manufacturer Part Number checkbox.
8. Click Finish.

Setting the Target Price

Target price is the price you quote for an item with the standard cost in mind. Standard cost is the market cost per unit of the item or the manufacturer part. The target cost of an item or the manufacturer part can be a percentage of the standard cost. In general, the target cost will be less than the standard cost.

The target price is specified when items are ordered in large quantities. When items are sent to suppliers for quotes, the suppliers may quote the price a bit lower or higher for the item according to their pricing conditions.

You can enter the target price of items in two ways:

- Auto — set the target price for selected items as a percentage of the standard cost.
- Manual — set the target price for each selected item manually.

To set the target price:

1. Open a project and go to the AML tab.
2. Select the row(s) of the item(s) for which you want to set the target price. Continue with one of the following procedures.

To auto-set the target price:

1. Choose Items > Target Price > Set Auto. The *Enter/Modify Target Price Percentages of Standard Cost* page appears.
2. In the % of Std. Cost field for each quantity break, enter the percentage of standard of cost that you entered in the Item Master.
3. Click Finish. The target price is updated on the AML tab of the project.

Note	This overwrites the existing target price displayed in the project.

To manually set the target price:

1. Choose Items > Target Price > Set Manual. The *Set Target Price - Manual* page appears.
2. Enter the target cost for each of the item (if multiple items were selected) in the corresponding Target Cost field.

3. Click Finish. The target price is updated on the AML tab of the project.

Note	These target prices will be reflected in new RFQs. To apply these target prices to existing RFQs, choose Items > Target Price > Update RFQ Targets.

Updating Target Prices in RFQs

You can update the target price of items that you have set in the project in RFQs. When you set the target price for an item at the project level, the change is not applied to any associated RFQs until you update the target price in the RFQs. You can update target prices in RFQs from the project.

Note	The target price stored in the Item Master may be different from the target price set in the project for items.

To update target prices in RFQs from a project:

1. Open a project and go to the AML tab.
2. Select the row(s) of the items that you want to update in all RFQs in the project.
3. Choose Items > Target Price > Update RFQ Targets. The target price of the selected items is updated in all the RFQs in the project.

Publishing Items and Manufacturer Parts

If you make changes to items or manufacturer parts, you can publish those changes to the Item Master. You can publish objects that already exist in the Item Master or that only exist in a project.

When you publish data, you can use Redlining or Authoring mode. To create redlines for BOMs and AMLs, you must specify a change order (such as an ECO, MCO, or SCO).

To publish items and manufacturer parts:

1. Open a project and go to the AML tab.
2. Select the row(s) of the item(s) you want to publish.
3. Click Publish. The *Publish to Item Master Wizard* appears.
4. On the *Set Publishing Options* page, set the following options:
   - Specify Contents to Publish — Check the box for each content type to publish. Depending on the project data you've selected, you can select Item, Bill of Material, Approved Manufacturer List, and Manufacturer Part.
   - Specify Default Types — Select the default type for items, manufacturers, and manufacturer parts.
   - Publish Mode — Select either Redlining or Authoring mode.

     If you select Redlining mode, you must specify a change order. Redlining mode, as its name implies, highlights in red any existing BOMs or AMLs that have changed. All items imported in Redlining mode are placed on the Affected Items tab of the specified change order.

     If you select Authoring mode, you can update unreleased items and create new

preliminary items. Once an item has a pending change, you can no longer use Authoring mode to update it.

5. If you selected Authoring mode, click Finish. Otherwise, continue by clicking Next to set redlining options.
6. On the *Set Redlining Options* page, set the following options:
   - Change Order — Click to select a change order (ECO, MCO, or SCO). You can select an existing change order or create a new one.
   - Redlining Mode — Select “Only Add and modify data (do not delete)” or “Add, modify, and delete data.”

     If you choose “Only Add or modify data (do not delete),” BOMs and AMLs are updated but no information is deleted. This is the default selection. If you choose “Add, modify, and delete data,” existing BOMs and AMLs are completely replaced with the published data, deleting BOM or AML.
7. Finish publishing. After the BOM and AML changes are published to the Item Master, the AML tab of the project appears.

Note	The published date and time appear in the Publish Date field on the AML tab. If the Publish Date field is not visible, click Configure Display to change the selected attributes.

Chapter 5

Analyzing Project Data

This chapter includes the following:

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Analyzing Project Data

In Agile PCM, you can review and analyze the project item content, including price information and RFQ response information. On the Analysis tab of a project, you can view the item information across all RFQs in the project along with response lines. You can create RFQs and send them to suppliers. The price information in the response line can be published as well. Costed BOM analysis and other analysis can be performed on product cost information and RFQ response lines.

The table on the Analysis tab displays information such as the supplier name, the item or the manufacturer part number, the revision (if any), the manufacturer, the manufacturer status, and the response line information.

You can select which fields to view on the Analysis tab. You can also filter the data. For more information, see Filtering the Project Data.

The Analysis tab provides support for several analysis features including:

- Best Response selection
- Costed BOM analysis
- Sourcing exceptions
- Other cost analysis views and reports

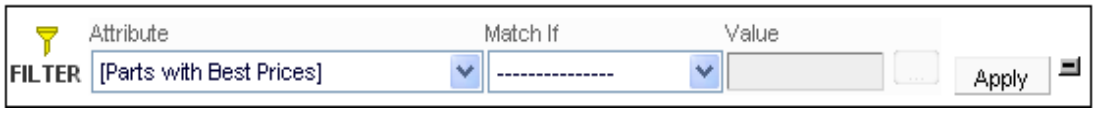
The following table describes the menus and list boxes on the project Analysis tab for both the supplier response summary and supplier price details view.

Menu/list box	Description
Analysis	Analyze details by costed BOM comparison or and non-material cost comparison. Run analysis reports.

Menu/list box	Description
Responses	Auto-select and export responses, set the best responses, look up price information, and publish prices for selected items.
RFQ	Create RFQs and add items.
Show AML	View or hide AML(s) and corresponding Supplier Responses, if any, of all the Items across the entire list in one go.
Configure Display	Click to select and sort the fields displayed on the tab.
Show Filter	Click to specify filter criteria. See the next section.
Price Scenarios	Select the price scenario to use for analysis. Select either Default Price Scenario, All Price Scenarios, or Selected Price Scenarios.
Currency	View normalized and original currencies.

Filtering the Project Data

On the Analysis tab of a project, the filter toolbar allows you to isolate the project data you want to see. The filter toolbar includes predefined filters as well as several attributes that you can use to filter data.



To filter the Analysis tab of a project:

1. Open a project and go to Analysis tab.
2. Click Show Filter.
3. Click the Attribute list and select one of the predefined filters (such as [Show All], [Items with Splits], or [Parts with Pricing]) or a specific attribute (such as Price Source or Supplier). The following table lists both predefined filters and attributes you can select.

Pre-defined Filters	Attributes
[Show All]	Item Number
[Items with Splits]	Item Description
[Items not in an RFQ]	Commodity
[Parts with Pricing]	Cost
[Parts w/o Supplier]	Quote As
[Parts waiting for Response]	Make/Buy
[Parts with Best Prices]	Manufacturer Part
[Parts w/o Best Prices]	Manufacturer
[Parts with Sourcing Exceptions]	AML Status
[Supplier Proposed Alternate Parts]	Source
	Response Status
	Bid Decision
	Supplier
	Supplier Rating
	Transportation Terms
	Buyer
	Planner
	Publish Price Date
	Published Price Status

4. If you select a *Pre-defined* filter, click Apply. The other fields of the filter toolbar are not applicable to the pre-defined filters.
5. If you selected an *Attribute:*
   a. Click the Match If list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected. Examples include Equal To, Not Equal To, Is Null, and Is Not Null, Starts With, and Contains.
   b. Select a value for the filter criteria. For text attributes, type a value. For list attributes, Click ... to select a single or multiple values from available values list.
   c. Click Apply.

Filtering Published Prices

When the prices are published from Analysis tab in a sourcing project, the system stamps its publishing date. In an unlikely event of failed publishing, the Publish Date and the Publish Status would be empty. You will not be able to know which prices did not publish unless you happen to come across them while browsing through the pages of responses.

To be able to identify the failed, or successful, instances, you can filter the Published Prices across their Date and Status using the attributes Publish Price Date and Published Price Status, respectively.

- Publish Price Date - You can filter the prices published before, on or after a particular date.

For example, if a few users in your organization published a certain number of responses today, and you want to know how many they were, this attribute lets you do so.

- Published Price Status - You can filter the prices that got published or did not.

  If you want to see the list of all the responses that failed to publish, select this filter attribute and "Is not Null" parameter. If you want to see all the responses (published and never published), select "Is Null" parameter.

Viewing Costed BOM Comparisons

A costed BOM comparison displays the responses of multiple partners or multiple suppliers. Duplicate item rows show the various responses. When you run the Costed BOM Comparison analysis, the system calculates material and non-material costs for each Cost Roll Up.

- For material costs, the system takes the materials price and applies any price adders specified in the response line. Price adders can be fixed costs or percentages. If the item has AML splits, the system calculates an average for the material costs.
- For non-material costs, the system sums all non-material flex fields.

If there are multiple BOM levels, the system rolls up material costs for each level of the BOM hierarchy to calculate the Total Materials Price for each subassembly and assembly.

Note If you modify the current price period for analysis purposes only, be sure to change it back before creating any new RFQs for the project.

The following table shows an example of a costed BOM with a subassembly:

Number	Cost	Quote As	QPA	Total Unit Cost	Total Materials Price	Total Non-Materials Price
A1	Yes	Assembly	1	20.50	18.00	2.50
P2	Yes	Component	1	2.00	2.00	0.00
P3	Yes	Component	2	3.00	3.00	0.00
P4	Yes	Component	3	1.00	1.00	0.00
A2	Yes	Assembly	2	3.50	2.50	1.00
P5	Yes	Component	1	1.50	1.50	0.00
P6	Yes	Component	1	1.00	1.00	0.00

The Cost and Quote As fields determine how prices are rolled up for the Costed BOM. If the Cost field is set to No, pricing information cannot be entered for that item and it appears gray. The Quote As field sets whether the item is quoted as an assembly, component, or custom component.

- If Quote As is set to Assembly, the Total Materials Price field will be the sum of the Total Materials

Price fields for all its sub-components.

- If Quote As is set to Component, the Total Materials Price field is entered on the response line and is not calculated. Total Non-Materials Price is not entered for components.
- If Quote As is set to Custom Component, the Total Materials Price field is entered on the response line and is not calculated. The Total Non-Materials Price field also becomes enabled. The Total Unit Cost field equals the sum of the Total Materials Price and the Total Non-Materials Price fields.

To view the costed BOM comparison:

1. Open a project and go to Analysis tab.
2. Choose Analysis > Costed BOM Comparison. The Costed BOM table appears showing duplicate item rows, one for each partner or the best supplier. All Partners and only the Best Supplier will displayed in the Costed BOM View.
   - For items with a split percentage, an average is calculated.
   - For items with no split percentage, the lowest price response is provided across all partners or suppliers.

   Note: If your project includes price periods, the lowest cost is based on the current price period. Best Response is selected based on the criteria mentioned while performing Set As Best. But Lowest Price Response will not be provided across all the Partners & Suppliers, each Partner/Supplier will have his own Response Line. If there are multiple quantity breaks per price period, the first quantity break is used. For information about how to calculate costs for a different price period, see Modifying Price Scenarios (on page 24).

3. To calculate costs using the latest supplier quotes, click .

   Note: When you perform Cost Roll Up, Costs will be calculated for all the Price periods present in the Project. For selecting the Best supplier for a specific Price period, you need to mention Price Period in "Select the Price Scenario To Analyze".

4. To view information for a selected price scenario, click the Price Scenarios drop-down list and select either Default Price Scenario, All Price Scenarios, or Selected Price Scenarios.

   If you chose Selected Price Scenarios, select price scenarios in the Available Values list, and then click to add them to the Selected Values list. Click OK.

5. Click Return to return to the Analysis tab.

Note: If pricing information is missing for any BOM components, the Total Materials Price field has two asterisks after the value, which indicates an incomplete roll-up of component prices.

Exporting a Costed BOM

After you have create a Costed BOM Comparison, you can quickly export the results to a text file.

To export a costed BOM comparison:

1. Open a project and go to Analysis tab.
2. Choose Analysis > Costed BOM Comparison. The Costed BOM table appears showing duplicate item rows, one for each partner or supplier.

3. Click Export button. The *Export Assembly Cost (Sourcing Project)* page appears.

   To recalculate costs, make sure the *Recalculate Costs Upon Report Execution* box is checked.
4. Select the Assembly Lines, Suppliers, and Price Scenarios to export.
5. Click Finish to generate the report.
6. The File Download dialog box appears.
7. Click Save to save the Costed BOM Comparison information as a Excel Comma Separated Value (.CSV) or Worksheet (XLS) format file to your computer.
8. Click <close>.
9. Click Return to return to the Analysis tab.

Viewing Non-Material Cost Comparisons

The non-material cost comparison displays the non-material total cost and the non-material cost breakdown for the relevant items included in all RFQs in the project and also for manufacturer part response lines. This view lets you compare the non-material costs provided by various suppliers.

The following table shows an example of a Non-Material Comparison.

				Quantitybreak1		Quantitybreak2	
Number	Rev	Commodity	Supplier	Quantity	Total Non-Materials	Quantity	Total Non-Materials
A1	A	ASSY	EMS1	100	2.50 USD	200	5.0 USD
A1	A	ASSY	EMS2	100	2.25 USD	200	4.0 USD
A1	A	ASSY	EMS3	100	2.00 USD	200	4.0 USD
A2	B	ASSY	EMS1	500	8.00 USD	1000	16.00 USD
A2	B	ASSY	EMS2	500	6.00 USD	1000	12.00 USD
A2	B	ASSY	EMS3	500	5.00 USD	1000	10.00 USD
A3	C	ASSY	EMS1	200	20.00 USD	400	40.00 USD
A3	C	ASSY	EMS2	200	15.00 USD	400	30.00 USD
A3	C	ASSY	EMS3	200	12.00 USD	400	24.00 USD

To view a non-material cost comparison:

1. Open a project and select the Analysis tab.
2. Choose Analysis > Non-Material Comparison. The non-material costs appear.
3. To view information for a selected price scenario, Click the Price Scenarios drop-down list and select either Default Price Scenario, All Price Scenarios, or Selected Price Scenarios.

   If you chose Selected Price Scenarios, select price scenarios in the Available Values list, and

then Click ➡ to add them to the Selected Values list. Click OK.

4. Click Return to return to the Analysis tab.

Generating Analysis Reports

Agile PCM offers a selection of analysis reports, which provide information directly from a project. You generate analysis reports from the project Analysis tab. These Analysis reports include flex fields from Items, Manufacturer Parts, and RFQ Response lines.

Note For more detailed information about each of the analysis reports and how to generate them, see *Getting Started with Agile PLM*.

The following table describes the analysis reports:

Report	Description
AML Differences Report	Displays changes made to the AML through validation or from supplier responses.
Assembly Cost Report	Establishes a total costed BOM, including material and non-material costs, and displays assembly-level and component-level breakdowns. The Supplier Assembly Cost Report has QPA and Total Extended Cost (UnitCost*QPA) fields additionally.
Cost Pareto	Identifies the items or commodities in a project that have the greatest impact on total cost; also known as the 80/20 analysis.
Effective Cost Comparison	Compares the effective extended cost accounting for minimum order and package quantity requirements.
Supply Base Analysis	Evaluates the price differences between multiple suppliers and applies discounts to strategic suppliers for further analysis.
Sourcing Exceptions	Establishes potential sourcing issues by letting you quickly view sourcing exceptions for project items. The exceptions are based on supplier responses, displaying obsolete and long lead-time items, EOL dates, or unknown part numbers.
Unit Cost Comparison	Compares the material and non-material unit costs between multiple suppliers and internal reference cost sources, highlighting the lowest price across all price sources.

Note Unit Cost Comparison, Effective Cost Comparison, Response Comparison Report enable comparison of response lines against selected target cost(s). You have an option to select target cost

To generate an analysis report:

1. Open a project and select the Analysis tab.
2. Select the checkbox for the item(s) you want to include in the report, and then choose Analysis > Reports & Analytics (*report name*). The Report wizard appears.

For complete instructions for generating a report, see *Getting Started with Agile PLM*.

Setting the Best Response for an Item

You can analyze the supplier responses to find out which supplier response is the best for a given item. By setting the best response, you flag it to track your selection and make that selection available for use in other analysis features and reports. You can set best responses either manually or by the auto-select process.

You can have only one response per Item (and its AMLs) as 'best' , with an exception for when AML splits are utilized. In such a case, each AML with non-zero splits can have a best response.

The best response is indicated by in the Best Response field. If the Best Response field is not visible, click Configure Display to change the selected attributes.

Note	If the Item has Multiple AMLs without splits, Only ONE of the AMLs can have a Best Response. If the AMLs have splits, each AML with non zero splits can have a Best Response.

You can also apply 'constraint' factors, e.g. leadtime, so that only 'qualified' responses can be 'set as best'.

Important You can select a sourcing object from the search results after performing an "object search".

To set the best response manually:

3. Open a project and select the Analysis tab.
4. Select the row(s) of one or more response lines in the Analysis table.
5. Choose Responses > Set As Best > Manual.

To auto-select the best response:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the response lines in the Analysis table from which you wish to find the best response.
3. Choose Responses > Set As Best > Auto-Select. The Auto-Select Responses Wizard appears.

   The user will select the Price Scenario that they will apply the rules to. The user shall select to apply the auto-select to all Items, or just selected Items. By default, All Items shall be selected.
4. Select the price scenario to analyze from the drop-down list.

   Only a single scenario can be selected, however the Best Response flag is applied to the Response Line as a whole. Only one Response Line shall be set as the "best" per Item. This means that only a single supplier / partner can be selected as having the "best" Response Line for that Item. If another Response Line had previously been set as the Best Response for an Item, the new selection shall override the previously selected Best Response.

Note	There is one exception to the rule of having one "best" per Item, and this is in the case where an Item has an AML split percentage. In this case, the system shall support two "best" response selections, one per AML entry with a non "0" split percentage.

5. Identify the items from which you need a best response:
   - All IPNs — Find the best response from all the items and manufacturer parts in the Analysis table.
   - Selected IPNs only — Find the best response among the manufacturer parts in the Analysis table.
6. Select the additional criteria for finding the best response:
   - Alternate Parts — Select this checkbox to find the best response for the selected items and manufacturer parts among the preferred and alternate parts in the Analysis table.
   - Historical Quote Responses — Select this checkbox to find the best response for the manufacturer part from the IPN's quote history (if any).
7. Click Next. The Selection Criteria page appears.
8. Select up to three of the following criteria from the drop-down lists by which to auto-select best responses:
   - Lowest Cost — Selects the best response based on which has the lowest cost.
   - Lowest Cost Within Lead Time Constraint — Selects the best response based on the lowest cost within a specified lead time constraint (in days).
   - Shortest Lead Time — Selects the best response based on which has the shortest lead time.
   - Supplier Rating — Selects the best response based on supplier ratings. You can prioritize the list of ratings. Your Agile administrator can customize the supplier ratings as required. The default ratings are Approved, Offered Active, Offered Inactive, and Strategic.
   - AML Preferred status — Select the best response based on AML status. You can prioritize the list of AML status types. The Agile administrator can customize the AML status types as required. The default AML status types are Preferred and Alternate.
9. Click Finish.

Applying Price Adders to Responses

Price adders are basically overhead rates. Price adders can be the additional cost of an item such as the intellectual property value, the royalty value, and so on, apart from the material cost. You can add as many price adders as you want. Your Agile administrator can customize the price adder fields to meet your needs. The price adder fields are common to all projects.

Price adder fields can be enabled for suppliers, or for buyers (for internal purposes). Only those price adder fields that are enabled for internal purposes can be applied to RFQ responses. Other price adder fields that are visible to suppliers are completed when the suppliers respond to RFQs. For more information, see *Administrator Guide*.

If a price adder field is enabled for suppliers, the field must also be selected as one of the Response Required Fields in the RFQ or project. Suppliers can enter price adders for each quantity break in the response line.

You can apply internal price adders by Part, Commodity or Supplier. When you apply internal price adders by

- commodity, each commodity is listed so that you can include a unique price adder percent or a fixed amount for each one.
- part, the price adders are applied only to the parts that you select.

Note	You cannot select multiple parts to apply price adders universally.

- supplier, you get the list of all the suppliers that have been associated to the current project, not necessarily only to the part that you selected. Price adders will be applied to all response lines associated with the supplier, as in the case of a penalty for the selected supplier(s)' performance.

Note	All costed BOM rollups and reports apply the price adders to the total material cost, regardless of whether or not suppliers can see the field.

To Apply Price Adders:

10. Open a project and select the Analysis tab.
11. Select the row(s) of the items for which you need to add price adders.
12. Choose By Part or By Commodity or By Supplier in Responses > Apply Price Adder. Corresponding *Apply Price Adders* window appears.
13. Enter the price adder information for each item for each quantity break.
14. Click Finish.

Looking Up Price Information

You can verify the existence of a price scenario for a specified period and quantity in the Item Master. If it exists, you do not have to create an RFQ for the specified item. You can either use the price information of the item, or you can modify the price information and send the RFQ to suppliers for requote.

In Agile PCM, there are three types of prices:

- Contracts — Predefined agreements with your suppliers for item prices over a specified time period.
- Published Prices — Item price information that has been published from other projects to the Item Master.
- Quote Histories — Quoted prices that were previously received for an item.

When you look up data for a particular item or manufacturer part, the price and response fields are updated with data that you can leverage in your analysis process.

Note	An item can have multiple types of prices. When you do a price lookup for an item, Agile PCM selects a price in the following order of preference: *contracts, published prices, and quote histories*.

Looking Up Contracts

Contract prices are pre-defined prices from the potential contractors or suppliers for a specified period of time. By looking up existing contracts with suppliers, you can save time by pulling contract-pricing information from the Item Master directly into the project BOM. The contract information is specific to suppliers, sites, programs, and effectivity periods. If multiple contracts meet the required criteria, the information from the contract with the lowest unit price appears. However, when you view the contract information, you can view all the contracts for the supplier

and part.

Note	Selection of the Price details depends on the Look Up criteria mentioned. It can be Lowest Price or Shortest lead time or Most recent Response.

To look up contracts:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the item for which you want to look up contract pricing information.
3. Choose Responses > Look Up. The *Look Up Responses Wizard* page appears.
4. Click the button next to the Price Types field and select Contract in the Available Values list, and then Click to add it to the Selected Values list. Click OK.
5. Select a price scenario from Specify best Price scenario to lookup drop-down list.
6. Select Yes or No for Populate Price for all scenarios, if you want want to see all price scenarios instead of just one them. Selection of Yes overrides any selection in the Specify best Price scenario to lookup drop-down list.

   Optional

   1. You can narrow down your look up criterion across
      - specific Supplier(s)
      - a particular Ship To Location
      - specific Program(s)
      - specific Customer(s)
   2. Enter the quantity deviation, in percentage, to search for in the Item Master if you select that option, or select the Ignore quantity button to ignore the quantity.
   3. Enter the number of days from the RFQ date range, plus or minus, within which the quotes have been received or select the Ignore start/end date range button to ignore the date of quote.
   4. Select the Lowest Price, Shortest lead time, or Most recent response button to filter the results if multiple rows are retrieved.
   5. Enter the number of days before the current date to consider quotes that occurred within that period of time.
7. Click Finish.

Looking Up Published Prices

Price information associated with items in the Item Master is called published prices. Prices for a part can be published after you've finished price negotiations with a supplier. For more information about publishing prices, see Publishing Prices for Items and Manufacturer Parts (on page 60). You can use the published price for items in the project.

To look up published responses:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the item for which you want to look up contract pricing information.
3. Choose Responses > Look Up. The *Look Up Responses Wizard* page appears.

4. Click the button next to the Price Types field and select Published Prices in the Available Values list, and then Click to add it to the Selected Values list. Click OK.
5. Select a price scenario from Specify best Price scenario to lookup drop-down list.
6. Select Yes or No for Populate Price for all scenarios, if you want want to see all price scenarios instead of just one them. Selection of Yes overrides any selection in the Specify best Price scenario to lookup drop-down list.

   Optional

   1. You can narrow down your look up criterion across
      - specific Supplier(s)
      - a particular Ship To Location
      - specific Program(s)
      - specific Customer(s)
   2. Enter the quantity deviation, in percentage, to search for in the Item Master if you select that option, or select the Ignore quantity button to ignore the quantity.
   3. Enter the number of days from the RFQ date range, plus or minus, within which the quotes have been received or select the Ignore start/end date range button to ignore the date of quote.
   4. Select the Lowest Price, Shortest lead time, or Most recent response button to filter the results if multiple rows are retrieved.
   5. Enter the number of days before the current date to consider quotes that occurred within that period of time.
7. Click Finish.

Looking Up Partner Pricing

Users can look up Partner pricing for all pricing that they are authorized to view.

For example, if the user wants to look up pricing information before creating an RFQ.

There are two ways to use this feature:

- Price object has two suppliers; a primary supplier and an authorized supplier. Project lookup will create a response price line for the primary supplier if both suppliers are present in the lookup criteria's supplier list and this price is picked up during Project Lookup.
- Multiplier suppliers are present in the lookup criteria, and they all appear in the authorized supplier list of a price object and that price is used during lookup, the first qualifying supplier appearing in the price object's authorized supplier list will be picked up for response priceline creation in the project. The authorized supplier list on the price object will be used as a priority list to determine which supplier gets picked up during Project Price Lookup.

Price Lookup Precedence

Primary Supplier takes precedence over Authorized Suppliers during the price lookup process wherein one price can be returned from the query.

Order for price lookup precedence is defined in the Authorized Suppliers list.

For more information on how to configure the price lookup precedence, see the “Configuring Product Cost Management” chapter in *Administrator Guide*.

Looking Up Quote Histories

Quote histories are created automatically from supplier responses when you lock or close a response line. Therefore, you have a record of price quotes from suppliers even if those prices are not published to the Item Master.

You can set any or all of the following options:

- Specific suppliers, Ship To locations, programs and customers from which you want to pull quote histories
- Date range
- Quantity range
- Lowest price, shortest lead time, and most recent response

Note	Agile PCM saves quote histories from a project and its RFQ response lines. Quote histories are available even if the project is deleted.

To look up quote histories:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the item for which you want to look up contract pricing information.
3. Choose Responses > Look Up. The *Look Up Responses Wizard* page appears.
4. Click the button next to the Price Types field and select Quote History in the Available Values list, and then Click to add it to the Selected Values list. Click OK.
5. Select a price scenario from Specify best Price scenario to lookup drop-down list.
6. Select Yes or No for Populate Price for all scenarios, if you want want to see all price scenarios instead of just one them. Selection of Yes overrides any selection in the Specify best Price scenario to lookup drop-down list.

   Optional

   1. You can narrow down your look up criterion across
      - specific Supplier(s)
      - a particular Ship To Location
      - specific Program(s)
      - specific Customer(s)
   2. Enter the quantity deviation, in percentage, to search for in the Item Master if you select that option, or select the Ignore quantity button to ignore the quantity.
   3. Enter the number of days from the RFQ date range, plus or minus, within which the quotes have been received or select the Ignore start/end date range button to ignore the date of quote.
   4. Select the Lowest Price, Shortest lead time, or Most recent response button to filter the results if multiple rows are retrieved.
   5. Enter the number of days before the current date to consider quotes that occurred within

that period of time.

7. Click Finish.

Publishing Prices for Items and Manufacturer Parts

Agile PCM provides a shortcut for publishing prices to the Item Master. When you receive responses from suppliers for different items and manufacturer parts, publishing them manually can be time-consuming. You can publish as much price information as you get for each item or manufacturer part. You can use the published price information for items and manufacturer parts in other sourcing projects.

On the Analysis tab, you can publish response line information only for the selected items and manufacturer parts. However, you cannot publish the response line information when the response is pending ( ).

When you publish prices, you can use Redlining or Authoring mode. To create redlines for price line data, you must specify a PCO.

Price Publishing Process

The price publishing process supports large amounts of price items. Each item is published in a single transaction so that if one price item fails to publish, it will not affect the publishing of the other items.

Each failure is reflected in the Price Publish Status attribute with an exclamation point icon (!).

Note	There is a maximum limit of 50 failures in order to improve the response time in case of large failure numbers. The price publish process will terminate when the maximum number of 50 failures is reached.

In addition to publishing prices contained in a project, you can publish items and manufacturer parts. For more information, see Publishing Items and Manufacturer Parts (on page 44).

To publish item prices:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the response lines that you want to publish to the Item Master.

Note	You should look for the best responses and publish those to the Item Master.

3. Choose Responses > Publish Selections. The *Publish to Prices Wizard* with *Set Publishing Options* page appears .
4. Set the following options:
   - Price Type — Select a Price type. The price types provided with Agile PLM are Contract, Published Price, and Quote History, but your company may implement other types.
   - AutoNumber Source — This drop-down list appears once you select a Price Type. If a Price Type has more than the default AutoNumber Sources, this list facilitates selection of one.
   - Publish Mode — Select either Redlining or Authoring mode.

     If you select Redlining mode, you must specify a PCO to publish updated prices. Redlining mode, as its name implies, highlights in red any price lines that have changed. All prices

imported in Redlining mode are placed on the Affected Prices tab of the specified PCO.

If you select Authoring mode, you can update existing price lines if the parent price is unreleased and does not have a pending PCO. Authoring mode is helpful when you are importing price lines for preliminary prices. Once a price has a pending PCO, you can no longer use Authoring mode to update its price lines.

- Update Mode — If you .
- Price Scenarios to be Published — Select All Price Scenarios or Selected Scenarios. If you select Selected Scenarios, click to specify which price scenarios to publish.
- Publish AML Price to Item — Select Yes to publish AML price(s) to an Item. This will display the Item price and AML prices in Prices tab under Item Master. If you select No, only the AML price(s) will be published and Not the Item price. This feature is beneficial when Agile PCM extracts/feeds an ERP system, enabling other users (such as a different manafacturing site) to refer Item prices and their AML prices.
- Stop After — The publishing prices process can stop due to various errors. These errors can be due various reasons, such as, a PCO is not closed, or a manufacturer part number in the sourcing project is does not exist in the item master, etc. Once the system encounters an error, it terminates the price publishing process immediately.

  For example, if you selected 100 responses for publishing prices and the system encountered an error with response #9, the process stops. This requires you to first fix the error and start the process all over again. Now, if the the system encounters an error with response #17, it will stop again, requiring you to fix it and restart the process. And so on. This hampers the publishing of all error free prices.

  To overcome these 'publish, fix error, republish' cycles, select 50 from Stop After drop-down list. This makes the system carry on with the publishing of the prices subsequent to all errors, and stops the process only when the 50th error occurs.

  If you select "none" from the drop-down list, the system will publish all the responses irrespective of the number of errors it encounters.

5. If you selected Authoring mode, click Finish. Otherwise, continue by clicking Next to set redlining options.
6. On the Set Redlining Options page, set the following options:
   - Change Order — Click to select a Price Change Order (PCO). You can select an existing PCO or create a new one.

Note	If any existing prices to which you are publishing are already subject to a pending PCO, you can't publish updated prices until the PCO is released.

   - Redlining Mode — Select "Add or modify Price Line data only (do not delete)" or "Add, modify, and delete Price Line data."

     The "Add or modify Price Line data only (do not delete)" setting updates price lines without deleting rows. If you choose "Add, modify, and delete Price Line data," existing price lines are completely replaced with the published price lines, potentially deleting price line data.
7. Click Finish.

Note	If an error occurs when you publish prices, the Published Price Date value appears red. You can click the date to see a description of the error. If the Published Price Date field is not visible, click Configure Display to change the selected attributes.

Converting Currency Values

In Agile PCM, you can convert any currency to the project currency by the currently prevailing conversion rates. Suppliers can quote the rates in their currency, which can be converted to the project currency for calculations. You can track and view normalized and original conversion rates.

Some of the currency conversion features provided with Agile PCM include the following:

- System-wide currency conversion table for storing conversion rates.
- Ability to create snapshots of project conversion rates for analysis purposes.
- Supplier responses are stored in their original quoted currency.
- Prices in historical responses and contracts are normalized based on the snapshot conversion rate.
- Ability to refresh conversion rates.

Note	The only place currency exchange rates affect Agile PCM is on the Analysis tab of a sourcing project. Currency conversion is not an automatic process. From the Analysis tab, you can switch between normalized currency rates and the original currency values entered by suppliers. Elsewhere in Agile PCM, currency conversion rates don't apply. For example, your system can be configured to have money fields on Page Two or Page Three of items. If you change the currency for a money field (for example, from USD to GBP), the field value isn't automatically recalculated for the new currency.
	User can switch between Original & normalized currencies in RFQ Responses tab also.

Viewing Responses in the Normalized Currency

Normalized currency is the project currency. Normalizing the currency is converting the value of the supplier's response quote to the project currency. Agile PCM normalizes response currencies to the default currency specified in the project by applying the conversion rate.

Note	Conversion calculations are performed in the background based on the prevailing conversion rates.

To view normalized currency rates:

1. Open a project and select the Analysis tab.
2. Select Normalize from the Currency drop-down list at the top of the window. The information in the table is refreshed.

Viewing Responses in the Original Currency

The original currency is the currency the supplier uses in quotes. When you view supplier responses, you view them in the suppliers' currency by default.

To view original currency rates:

1. Open a project and select the Analysis tab.

2. Select Original from the Currency drop-down list at the top of the window. The information in the table is refreshed.

Note	By default, the currency view is Original.

Refreshing Currency Conversion Rates

When you refresh conversion rates in a project, all currencies are normalized based on any new rates stored in the conversion rate table. However, this does not apply to the published response items in the project.

In addition, Agile PCM makes a snapshot of the latest conversion rates used to re-normalize the project currency fields.

Note	The Agile administrator can update the conversion rates. For more information, see *Administrator Guide*.

To refresh currency conversion rates:

1. Open a project and select the Analysis tab.
2. Choose Responses > View/Refresh Conversion Rates. The *View/Refresh Conversion Rates* window appears.
3. Click Update to Current to update the response line prices other than the published item prices in the project.

Exporting Price Information from a Project

After you have completed your sourcing activities, you can quickly export the results to an Excel file. You can export the responses as a flat list of price data or as a costed BOM.

Note	There is a separate column for displaying Publish Status. If the Prices are not Published, no Date will be displayed, but the Reason for publish failure will be displayed in Publish Status column.

To export price information:

1. Open a project and select the Analysis tab.
2. Select the item response line(s) you want to export.
3. Choose Responses > Export. An Export process window pops up.
4. Select the file format - CSV or Microsoft Excel Workbook, to save the price information to your computer.
5. Click Continue. The File Download dialog box appears.
6. Click Save button.
7. Upon completion, click Close to close the Export dialog box.

Bulk Editing

When you need to make a universal change in IPN, MPM and Response Flex Attributes across the entire list of Items or a set of select Items, you can Bulk Edit them. Also you can add bookmark for Bulk Edit.

There are 2 places where the data can be edited in bulk -

- In AML tab allows you to edit all Item and Mfr Part fields. Standard fields (like item description, mfr part description etc) and flex fields are bulk-editable in this view.
- In Analysis tab allows you to edit flex fields of Item, Mfr Part & Response fields. Standard fields (item desc, mfr part desc etc) cannot be bulk-edited in this view.

To Bulk Edit:

1. In a Sourcing Project, go to Analysis tab.
2. Select the desired row(s) of Item(s) or all the rows of the displayed page or click Global Select button.
3. Select Responses > Bulk Edit. It opens up *Bulk Edit* window.
4. Select an Attribute from Fields drop-down list and a value from corresponding Value drop-down list.
5. If you want to change more attributes, click Add to open up more Field and Value rows.

Important The Fields drop-down list contains only those Attributes, such as RESPONSE_TEXT01, that have been set Visible in Java Client. For more information on enabling Flex Field Attributes, see *Adminstration Guide*.

On the flex attributes enabled in the source table such AML.ITEMS, AML.AML, RFQ.RESPONSE and in ANALYSIS table are available for bulk edit. For example, resp text01 must be enabled in both Analysis and RFQ Response tables, ipn text01 must be enabled in both Analysis and AML.Items tables in order to be editable.

The attributes will only be updated when the attributes are applicable to the row. For example, IPN flex attributes will only be applied to IPN rows and will not have effects on MPN rows. Response flex attributes will only be applied when there are suppliers associated with the item.

Chapter 6

Requests for Quotes (RFQs)

This chapter includes the following:

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- RFQ Terminology 66
- RFQ Terms and Conditions 67
- RFQ Process Flow 68
- Creating Request for Quote 71
- Working with RFQs 78
- Editing Responses 84

About RFQs

You establish your sourcing contact with your suppliers through Requests For Quotes (RFQs). Using RFQs, you can request quotes for any items involved in a project, and the suppliers can respond to your requests. To create RFQs, you must have the Create privilege for RFQ objects. Generally, this means you must either be assigned the Sourcing Administrator or RFQ Manager roles, or someone with similar privileges must share a sourcing project with you.

Once an RFQ is created, sourcing project managers can send it to one or more suppliers for quotes. The rich features in Agile PLM help you negotiate prices and terms with suppliers. You can analyse responses from multiple suppliers and select the best terms.

You can use RFQs to do the following:

- Create, prepare, and target RFQs to one or more suppliers.
- Leverage contract and historical response information to eliminate unnecessary supplier requests.
- Review and adjust RFQs when they are in the Draft state.
- Send the RFQs to suppliers, and track their response status.
- Review, compare, and analyze supplier responses.
- Negotiate to establish better pricing or terms with specified suppliers and line items.
- Mandate suppliers to accept RFQ Terms and Conditions before viewing an RFQ.

The following table describes the RFQ tabs and the actions you can perform from each one.

Tab	Description	Actions
Cover Page	Displays general details about the RFQ.	View and edit RFQ details.

Tab	Description	Actions
Responses	Displays response details.	View by Supplier Response Summary. Select a Price Scenario to view responses. Filter how to view response details. Delete items. Add, auto-assign, and remove suppliers. Manage responses. View currencies.
Response Status	Displays a summary of the RFQ and supplier response.	Expedite the RFQ. Export or import the RFQ for non-Web suppliers.
Changes	Displays item or response changes in the RFQ.	View response details. View the item change summary by items that were added or changed. Select a date that determines the response and change summaries. View Unapplied Item Changes in RFQ Changes tab.
Discussion	Displays the discussion objects created related to the RFQ.	View the list of discussions in the table with the options to reply, delete, and add discussions.
Attachments	Displays a list of any file attachments for the RFQ.	View file attachment details. Edit, remove, and add attachments.
History	Displays a list of actions performed during the life of the RFQ.	View user, date, time, and description for each action.

RFQ Terminology

This section provides definitions of important terminology related to RFQs.

Terms	Descriptions
RFQ	Request for quote. A medium for requesting quotes for items from suppliers.
Response	The medium through which the supplier can respond to the RFQ. Multiple responses are created in the RFQ when multiple suppliers send responses.
Response line	The response medium between you and the supplier for negotiating the price terms. Each item has a response line in the response depending on the Quote As attribute set for the item.
Standard Cost	Applies to an item. This is the market cost of the item. It is site-specific. The standard cost is for a single unit.
Target Cost	Applies to item. This is the expected cost of the item by you or the supplier. This can be a percentage of the standard cost. Target cost is for a single unit.
Quote As	Applies to an item. This is used in the RFQ for getting the quote according to the option you set. There are three Quote As options: ▫ Assembly - The supplier quotes only the non-material price. ▫ Component - The supplier quotes only the material price. ▫ Custom Component - The supplier quotes both the material price and non-material price. The non-material price includes the labor rate, sales tax, and so on.

Terms	Descriptions
Cost	Applies to the item. This is site-specific. You can set the Cost to Yes or No to specify whether the item has a price in the Item Master. You can edit this setting in the project later. If the Cost is neither Yes nor No when an item is added to a project, it is set to Yes in the project by default. ▫ Yes - Suppliers must quote a price for the item. ▫ No - Suppliers cannot quote a price for the item. A response line will not be created in the RFQ for the item.
NCNR	Non-Cancelable Non-Returnable. Applies to an item. NCNR can be Yes or No, depending on the supplier. You can ask for the NCNR information in the supplier response. This is one of the critical factors in finding the best deal among the supplier responses. ▫ Yes - The item ordered or purchased cannot be canceled or returned to the supplier even if the item is not needed or is defective. ▫ No - The item ordered or purchased can be canceled or returned to the supplier if the item is not needed or is defective.
UOM	Unit of measure. The standard unit of measure of the item. For example, fuel is measured in gallons.

RFQ Terms and Conditions

You can bind the suppliers to accept specialized terms and conditions before they can open an RFQ.

Configuring RFQ Terms & Conditions in Agile Java Client

If you want to specify Terms and Conditions for the supplier to accept before they can open an RFQ, you must configure the Java Client node, Product Cost Management > RFQ Terms & Conditions from the Admin tab in the Java Client to activate this feature.

Note For information on how to configure your “RFQ Terms & Conditions” form, read the section, “RFQ Terms & Conditions,” in the chapter, “Configuring Product Cost Management” in *Agile PLM Administrator Guide*.

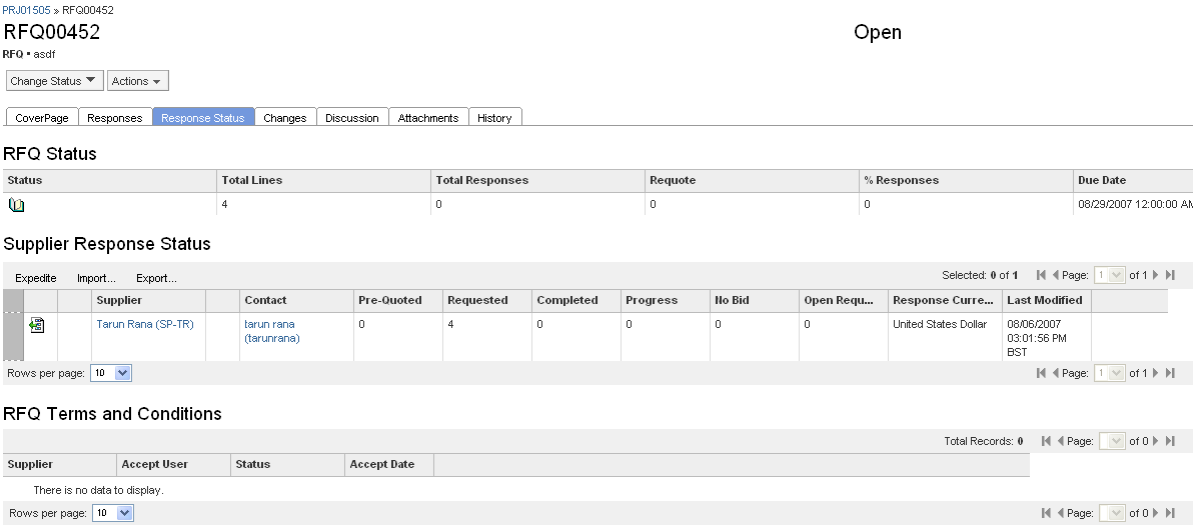
After you have configured the RFQ Terms & Conditions in the Java Client, you can set up the Buyer side to see RFQ Terms & Conditions.

Buyer Side RFQ Terms and Conditions Set Up

Users can make RFQ Terms & Conditions mandatory at the Project level, which will automatically apply this to all RFQs created. Select Yes for the “Require RFQ Terms and Conditions” field when you create the Sourcing Project.

Users can override RFQ level “Require RFQ Terms and Conditions” on the RFQ cover page if they have the correct privileges.

The buyer maintains status of the Terms and Conditions acceptance status. As supplier users accept the Terms and Conditions, the buyer will see their “yes or no” status in the RFQ Status page.



Supplier View

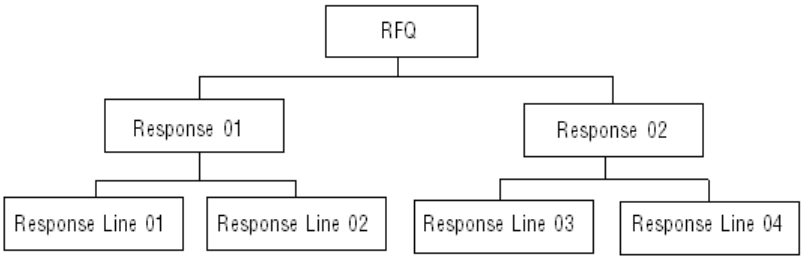
When a supplier opens an RFQ, the Terms and Conditions form opens with Accept and Decline buttons. If the supplier declines, the RFQ will not open, and hence, the supplier user will not be able to see its contents. All avenues to the RFQ are blocked: search, link from notification and from Workflow Routings. The supplier needs to accept the Terms and Conditions only once in order to proceed with the RFQ. The Terms and Conditions form does not appear again.

If a supplier user forwards the RFQ to another supplier user, the new user will also have to accept the terms first for once in order to open the RFQ.

RFQ Process Flow

The RFQ process involves three related objects:

- RFQ — You can ask for quotations for an item from suppliers and partners. You can send an RFQ to multiple suppliers.
- RFQ response — A medium of communication between you and the supplier. One response from a supplier can contain multiple response lines for different items. Price data is added to the project automatically when the supplier submits the response.
- Response line — Each response line has information about only one item. The negotiation of price and terms for items is dealt with in the response line.



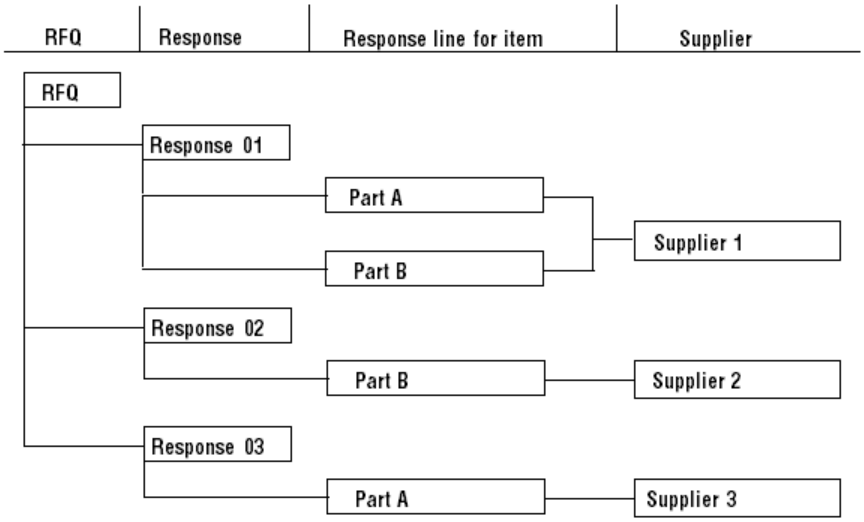
How RFQ Responses and Response Lines are determined

RFQ responses and response lines are based on the items in an RFQ and the selected suppliers. Although you can select specific suppliers for items, Agile PLM can also automatically disseminate RFQ responses based on suppliers' manufacturer and commodity offerings and the selected routing rules for the RFQ. Consequently, suppliers can be sent an RFQ response to quote on one or more items, depending on their offerings.

The following table shows an example of two items being quoted by three suppliers. Part A is being quoted by Supplier 1 and Supplier 3. Part B is being quoted by Supplier 1 and Supplier 2.

Item	Supplier 1	Supplier 2	Supplier 3
Part A	Yes		Yes
Part B	Yes	Yes	

The following diagram shows the responses, response lines, and suppliers for Part A and Part B.



RFQ Tasks

The goal of an RFQ is to establish pricing and availability of parts from various suppliers. When you are finished with the RFQ process, you can publish negotiated prices to the Item Master. Here are the steps needed to complete the RFQ process:

1. Create an RFQ.

2. Add items to the RFQ.
3. Assign suppliers and partners.
4. Send the RFQ to suppliers and partners.
5. Review response lines from suppliers.
6. Negotiate or requote (if needed).
7. Publish prices to the Item Master.

The following table lists PCM symbols that help you quickly identify the status of RFQs. These symbols appear Responses Tab when you open an RFQ.

Symbol	Represents	Description
	RFQ	This icon represents an RFQ.
	Quoted	This icon appears for items that are added to the RFQ.
!	Error	This icon indicates that there is an error in the response line. When you enter an invalid data, for example, when you enter text data in a numeric field, or leave a 'required' field unfilled, it appears on left of the field row besides highlighting the row in Light Magenta color. Click the icon to see more information about the nature of error.
	Not Read	This symbol represents that the RFQ has still not been opened to the Supplier.
	Pending	This icon appears for items in RFQs to indicate that the RFQ for the item has been sent to the supplier and a response is pending.
	Expedite	This symbol represents that a message to expedite the RFQ Response has been sent to the supplier
	Locked	This icon appears for items in RFQs to indicate that the supplier cannot make any changes to the response lines they have sent. Once you open the RFQ line to a supplier, you can edit it only when it is subsequently Unlocked.
	Response	This icon appears for items that have received a response from the supplier.
	Requote	This icon appears for items that are sent to suppliers for requote.
	Details	This icon displays the quoted amount for the particular item. You can click the icon to view the quoted amount.
	View Response Changes	This icon indicates that some changes were made to the quotes since the first response. You can click the icon to view the changes that have been made to the quote.
	Alternate/Proposed manufacturer part	This icon indicates that the supplier has proposed an alternate part for the quoted manufacturer part. The response line displays the icon and the part information.

RFQ Status

The lifecycle statuses of RFQs are Draft, Open, Locked, and Closed. The following table provides information about these statuses and the icons that represent them.

These symbols appear between RFQ Number and RFQ Description columns in RFQs Tab of a Sourcing Project

Status	Description
Draft (in progress)	The default status of the RFQ upon creation is Draft. You can add items and assign suppliers to items manually or using the auto-assignment tool. Look up contract and response history. Flag items as pre-quoted to not send to the suppliers, but to keep those items for analysis.
Open (in progress)	When the status of the RFQ is changed to Open, the RFQ is sent to the assigned suppliers. The suppliers see the RFQ notification in their inbox and can then quote for the RFQ items. You can send RFQs to suppliers for requote when the RFQ is open.
Locked (in progress)	You can analyze or make any changes to the response from the supplier for requote or acceptance. It temporarily blocks suppliers from updating the RFQ (supplier responses are not accepted). Quote Histories are created even if the RFQ is locked.
Closed	The final state of the RFQ. You can close the RFQ when you have received satisfactory responses. Suppliers cannot make changes to the RFQ. Note When you close an RFQ, you automatically trigger the creation of a Quote History object to preserve a snapshot of quoted prices (if any). For more information about SmartRules, see *Administrator Guide*.

Creating Request for Quote

You can create RFQs in the project from Items, AML, or Analysis tab. You can create multiple RFQs and send them to multiple suppliers and partners for a quote. To create RFQs, you must have the Create privilege for RFQ objects. Agile provides two roles that let users create RFQs:

- Sourcing Administrator
- RFQ Manager

If you have not been assigned either of these roles, someone with appropriate privileges can share a sourcing project with you, thereby allowing you to create RFQs. For more information, see Sharing a Project with Other Users (on page 14).

Note You can create RFQs only when the project status is Open.

To create an RFQ:

1. Open a project and go to either the Items, AML, or Analysis tab.
2. Select the row(s) of the item(s) for which you want to create an RFQ.
3. Choose RFQ > Create. The *Create Requests for Quote* with *Identify RFQ Number* page appears.

4. Enter a unique identification number for the RFQ in the Number field, or click 123 to get an automatically generated number.
5. Click Next. The *Enter RFQ Information* page appears.
6. Enter mandatory information
   - A brief description about the RFQ in RFQ Description field.
   - Click the Due Date calendar and select a date. Suppliers should send responses by this date.
7. Enter optional information
   - Click button next to the Data to Share field, and select the data that you would like your suppliers to see.
   - Click button next to the Response Requirements field, and select the response data that you need from the suppliers.
   - Enter any instructions that you find important or useful for the suppliers in the Supplier Instructions field.
   - Select the owner of the RFQ from the Owner drop-down list. The owner, by default, is the one who created the RFQ. Only users with the appropriate privileges can create RFQs.
8. Click Next. The *Select Part Addition Rule* page appears.See Part Addition Rule (on page 73) for details.
9. Click Next. The *Select Suppliers* page appears.

   All the partners associated with the item(s) appear under Select Partners. By default, all the partners are selected to receive the RFQ. If you want to send the RFQ only to some of them, you may clear the checkboxes of the rest. You can decide to send the RFQ only to the partners or only to the suppliers or to both.

Note	This option to select partner appears only if the items have partners associated to them. See Assigning Suppliers & Partners ("Assigning Suppliers and Partners" on page 75)

10. Click button next to the Suppliers field to open the supplier search window. You can narrow down your search by selecting Suppliers, Supplier Groups or any other user-defined category of supplier. Select the desired suppliers, or supplier groups, from the Results list and move them to the Selected cell. For easy identification of suppliers, see Supplier Identification.
11. Select the dissemination method from the Dissemination Method drop-down list. For more information, see Dissemination Methods (on page 73).
12. You can filter the selected suppliers across their ratings by moving the desired ratings from the Available Ratings list to the Selected Ratings list. For example, if you want the RFQ to be responded only by the Approved Suppliers, this filter helps you eliminate the rest of the suppliers.
13. Click Next. The *Add Attachments* page appears.
14. Add attachments, and click Finish.

Note	Errors on the page are marked by a ! symbol. <double-click> the icon to view a description of the error.

Part Addition Rule

In the *Select Part Addition Rule* page, you can select specific items for the RFQ. The following table describes the options.

Option	Description
Add selected items and all sub-components	Adds selected assemblies, sub-assemblies, and items, and any of their sub-components.
Add selected items only, without sub-components	Adds only selected assemblies, sub-assemblies, items, and sub-components. If an assembly is selected, its sub-components aren't added unless they are also selected.
Add only sub-components of selected items	Adds only sub-components of the selected assemblies and sub-assemblies. The sub-components include the BOM components and their associated manufacturer parts.

Note Check the Create this RFQ as a background process checkbox

The figure that you see as Key is a dynamic representation of affects that the options under Parts to Add have on the items in RFQ. This helps you decide which of the options is best for you.

Dissemination Methods

Dissemination is the process of assigning RFQs to the respective suppliers based on the methods you specify. The manufacturer or commodity offerings that a supplier sets up indicate what products they sell. Agile PLM supports the creation of these offerings by geographic regions that can be associated with the project's specified Ship To location.

You can also apply a rating to the Product - Ship To location relationship, which lets you specify whether or not the supplier is strategic or approved to sell a product for your ship-to location. It can also specify that they offer the product, but that you have not approved it.

When RFQs are disseminated, Agile PLM looks at the manufacturer and commodity offerings for each supplier and assigns parts to suppliers according to the selected routing rules for the RFQ.

The dissemination method involves the supplier ratings. The out-of-the-box supplier ratings provided with Agile PLM are:

- Approved
- Strategic
- Offered Active
- Offered Inactive

Note Agile PLM administrators can define additional supplier ratings. There is no implied order to the supplier ratings. When you disseminate an RFQ, you can select multiple supplier ratings.

The RFQ dissemination methods include:

- Manufacturer — The RFQ is assigned to suppliers based on their manufacturer offerings.
- Commodity — The RFQ is assigned to suppliers based on their commodity offerings.

- All — The RFQ is assigned to all suppliers regardless of their manufacturer or commodity offerings.

Example — Dissemination by Manufacturer

Project: PRJ

Part: Part A

Manufacturer: Acme

Ship To Location: San Jose

Supplier Rating: Strategic

Here is a list of suppliers and their manufacturer offerings:

Supplier	Manufacturer	Ship To Location	Rating
Supplier A	Acme	San Jose	Approved
Supplier B	Acme	Bangalore	Strategic
Supplier C	Acme	San Jose and Bangalore	Strategic

When the dissemination method is Manufacturer and the supplier rating is Strategic, the RFQ is assigned to Supplier C, since it is has a matching manufacturer offering.

Example — Dissemination by Commodity

Project: PRJ

Part: Part A

Commodity: Comm1

Ship To Location: San Jose

Rating: Approved

Here is a list of suppliers and their commodity offerings:

Supplier	Manufacturer	Ship To Location	Rating
Supplier A	Comm1	San Jose	Approved
Supplier B	Comm1	Bangalore	Strategic
Supplier C	Comm1	San Jose	Strategic

When the dissemination method is Commodity and supplier rating is Approved, the RFQ is assigned to Supplier A since it has a matching commodity offering. Although Supplier B supplies the commodity Comm1 for San Jose, it is not assigned the response line because its rating is Strategic.

Routing RFQs

Information that you enter when you create an RFQ determines which suppliers receive the RFQ. This can help you get the best deal from suppliers. To be sure an RFQ is sent to the correct

supplier organizations, make sure all manufacturer and commodity offerings are current and suppliers are rated.

Every supplier organization has an RFx Routing table that defines how RFQs should be routed to specific users based on their region. When an RFQ is sent to a supplier, it is automatically routed to the appropriate user within the organization. If the Ship To location does not match any of the specified locations in a supplier's RFx Routing table, the RFQ response is routed to the supplier's default recipient.

Adding Items to an RFQ

After you create an RFQ, you can add more items to it even if you have already sent the RFQ to suppliers for quotes.

To add items to an RFQ:

1. Open a project and go to the Items tab.
2. Select the row(s) of the item(s) you want to add to the RFQ.
3. Choose RFQ > Add Items. The *Add Items to RFQ* with *Select RFQ* page appears.
4. Select the row(s) of the RFQ(s) to which you want to add the selected items.
5. Click Next. The *Select Part Addition Rule* page appears. For information, see Part Addition Rule (on page 73).
6. Click Next. The *Select Suppliers* page appears.
7. Select the suppliers or supplier groups.
8. Select the dissemination method from the Dissemination Method drop-down list. For more information, see Dissemination Methods (on page 73).
9. Click Finish.

Assigning Suppliers and Partners

For any item in the RFQ, you need to assign the supplier or partner information. This is the procedure that sets up RFx routing.

A Partner is basically a supplier with an advantage of access to AMLs of the Top Level Assemblies. A Supplier is gets to see just the Assemblies, and not its AMLs. You can assign partners to the items on the Items tab. See Adding Partners to Project Items (on page 34) for details.

You can also assign suppliers to items on the RFQ Responses tab. See Assigning Suppliers (on page 81) for details.

Updating Target Prices of Items

When you set the target price for an item at the project level, the change is not applied in any associated RFQs until you update the target price in the RFQs. You can update the target price of items in RFQs from the project or in the RFQ.

Note	You can edit the target price of the item in the AML tab of the project. For information about how to publish prices to the Item Master, see Publishing Prices for Items and Manufacturer Parts (on page 60).

Project-Level Update

The project-level update affects all the RFQs in the project that include the selected items.

To update target price of items in RFQs from the project:

1. Open a project and go to AML tab.
2. Select the row(s) of the item(s) for which you want to update the target price in the RFQ.
3. Choose Items > Target Price > Update RFQ Targets.

RFQ-Level Update

The RFQ-level update affects only the items in the selected RFQ with the project-level target price.

To update target price of items in RFQs from within the RFQ:

1. Open an RFQ and go to Responses tab.
2. Select the row(s) of the item(s) for which you want to update the target cost from the project.
3. Select Items > Update Target From Project.

Note	You can set target prices only on draft or locked responses, or responses in a locked RFQ.

Deleting Items from RFQs

You can delete items from RFQs when you decide to continue with the same price information available for an item and no longer need to request quotes from suppliers.

Note	You cannot delete items from RFQ that have already been sent to a supplier for quoting.

To delete items from RFQs:

1. Open an RFQ and go to Responses tab.
2. Select the row(s) of the item(s) you want to delete.
3. Choose Items > Delete.

Note	The items are deleted only from the RFQ. They are not removed from the project.

Sending RFQs

You can send RFQs to Web suppliers, or you can export an RFQ to an Excel Worksheet or Comma Separated Value (CSV) file and send it as an email attachment or as a hardcopy to a non-Web suppliers.

Note	You can send individual line items that are ready for a quote before all the items in the RFQ are ready.

Sending RFQs by Changing the Status

RFQs are sent to suppliers and partners when the status is changed to Open.

To send RFQs by changing the status:

1. In a project, go to RFQ tab
2. Open an RFQ.
3. Choose Change Status > Open.

The RFQ notification is sent to Web suppliers.

Sending Line Items in RFQs

You can send items that are ready out for quoting. You do not have to wait until all the items in the RFQ are ready to send out for quotes.

Important Make sure that each line item has an assigned supplier.

To send line items in an RFQ:

4. From the Responses tab of an RFQ, select the row(s) of the items that you want to send out.
5. Choose Responses > Open Response Line to Supplier.

Note	This sends only the selected line items to suppliers.

Exporting RFQs for Non-web Suppliers

Non-Web suppliers are those who do not perform transactions online. They do not have Web access and therefore cannot use the Agile Web Client to respond to RFQs. You cannot send RFQs to non-Web suppliers by changing the status of the RFQ to Open or by opening the line items. To send RFQs to non-Web suppliers, you need to export the RFQ and send it as an attachment in email or as hardcopy through any appropriate channel.

Note	If a supplier is a non-Web supplier, the Web Supplier status on the supplier General Info tab should be set to *No*

To export RFQs for non-Web suppliers:

1. Open an RFQ and go to Response Status tab.
2. In the Supplier Response Status section, select the row(s) of the non-Web supplier to whom the RFQ should be sent.
3. Click Export. A *Export File Type* window appears giving you option to select either CSV (Comma Separated) or Microsoft Excel Workbook.
4. Click Continue.The File Download dialog box appears.
5. Click Save to save the file to your computer.
6. When the download is complete, click Close in the *Export File Type* window.

Note	You can send the file as an attachment through email, or send a hardcopy of the RFQ through any appropriate channel to the non-Web supplier.

Working with RFQs

This section consists of the following:

- Finding RFQs
- Viewing RFQs
- Changing the RFQ Status
- Deleting RFQs
- Viewing RFQ Changes
- Viewing RFQ History

Finding RFQs

All RFQs are associated to a specific sourcing project. To see the list of RFQs for a project, open the project and go to RFQs tab.

Like any other Agile object, you can also find an RFQ through a search. You can use the simple search, advanced search, saved search, or bookmarks to find the RFQ.

The search result displays the name and the identification number of the RFQ, the description of the RFQ, and the status of the RFQ. You can click the RFQ Number to view and edit the information about the RFQ.

To find the RFQ assigned to you:

1. In the left pane, under Searches, expand Supplier RFQ Searches and click on RFQ Requests that I Own. You may also use any of other preset search criteria as required.

Viewing RFQs

You can view the RFQs created in a particular project in its RFQs tab. A dot symbol on RFQ tab denotes that the project has RFQs.

The table in the RFQs tab lists information including the RFQ description, status, response percentage, and the number of suppliers who responded.

To view the RFQ in the project:

1. Open a project and go to RFQs tab.
2. Click the RFQ number to view the RFQ information.

Changing the RFQ Status

You should change the status of the RFQ when you want to edit the response line, send the response to suppliers, or close the RFQ.

To change the status of the RFQ:

1. Open a project and to to RFQs tab.
2. Select the row(s) of the RFQ(s) whose status you want to change.
3. Click Change RFQ Status, and choose the status you want.

Deleting RFQs

You might occasionally want to delete RFQs. For example, if you want to requote items with different target costs or different AMLs, you can delete the RFQ, update the project, and then create a new RFQ. You can delete an RFQ only if its status is Draft or Closed. You cannot delete open or locked RFQs. When you delete an RFQ, any prices previously published from the RFQ to the Item Master remain unaffected.

To delete an RFQ:

1. Open an RFQ.
2. Click Change Status and change the status of the RFQ to Draft or Closed.

   Note When you change an RFQ status to Draft or Closed, all suppliers and partners associated with the RFQ are automatically notified.

3. Choose Actions > Delete. A message appears for you to confirm whether or not you want to delete the RFQ.

   Note Once you open an RFQ it cannot be changed to Draft state again.

4. Click OK to delete the RFQ.

Viewing RFQ Changes

You can view RFQ changes to track items that were added, deleted, or changed, as well as to monitor response changes. The Changes tab displays a list of changes that have occurred to the RFQ because of project item updates. When a change is made to items in the project, and that change affects the contents of an existing RFQ, an RFQ change notice is generated.

You can view the item changes and the response changes made to the RFQ on the Changes tab. The filters are available in the Changes tab for viewing the added, changed, and deleted items individually. You can also view the Unapplied Items changes, if the Items are present in the RFQ.

Note The content of the Changes tab are refreshed automatically when an action is performed on it.

To view RFQ changes:

1. In the Changes tab of an RFQ, choose Views > Responses to view the response changes in the RFQ, or choose Views > Items to view the item changes in the RFQ.

   Note The default view is Unapplied Item Changes

2. You can view changes based on the date.
   - In the Items view, select a date and time from the Changes Since list at the top of the page.
   - In the Responses view, select the date from the Changes Since calendar.

3. To filter the changes, choose Filters > Added, Filters > Changed, or Filters > Deleted.

Note	You can filter the changes only in the Items view.

Viewing RFQ History

The History tab shows information about each action for this RFQ, including the name of the person who performed the action, the date and time of the action, and a description of each action.

To view RFQ history:

1. Open an RFQ.
2. Click History tab.

You can view the actions and transactions that happened in the RFQ since it was created.

Working with RFQ Responses

Suppliers enter and submit their quotes for items in responses. The Responses tab of an RFQ displays all the items, BOMs, and the manufacturer parts of the items in the RFQ. The status of each response line, the details of the response from the supplier, and the changes made to the response are displayed.

This sections consists of the following:

- Filtering RFQ Responses
- Assigning Suppliers
- Expediting RFQ Responses
- Viewing Responses in Different Currencies
- Looking Up Price Information

Filtering RFQ Responses

On the Responses tab of an RFQ, the filter toolbar allows you to isolate the responses you want to see. The filter toolbar includes pre-defined filters as well as several attributes that you can use to filter data.

To filter the Responses tab of an RFQ:

1. Open an RFQ and go to Responses tab.
2. Click Show Filter.
3. Click the Attribute list and select one of the pre-defined filters (such as [Show All], [Items with Splits], or [Parts with Pricing]) or a specific attribute (such as Price Source or Supplier). The following table lists both pre-defined filters and attributes you can select.

Predefined Filters	Attributes
[Show All]	Item Number
[Items with Splits]	Item Description
[Parts with Pricing]	Commodity
[Parts w/o Supplier]	Cost
[Parts waiting for Response]	Quote As
[Parts with Sourcing Exceptions]	Make/Buy
[Supplier Proposed Alternate Parts]	Manufacturer Part
[Supplier Proposed Alternates]	Manufacturer
[Items with incomplete pricing]	AML Status
	Source
	Response Status
	Bid Decision
	Supplier
	Supplier Rating
	Transportation Terms
	Buyer
	Planner

4. If you select a pre-defined filter, click Apply. The other fields of the filter toolbar are not applicable to pre-defined filters.
5. If you selected an attribute instead of a pre-defined filter:
   a. Click the Match If list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected. Examples include *Equal To, Not Equal To, Is Null, and Is Not Null, Starts With, and Contains*.

Note	The Match if operator *Contains* enables multiple selection of values on list attributes such as Supplier, Manufacturer and Commodity, Supplier Rating, etc.

   b. Select a value for the filter criteria. For text attributes, type a value. For list attributes, click button to select a value from a list.
   c. Click Apply.

Assigning Suppliers

The Responses tab lists all response lines from suppliers for items, BOMs, and Manufacturer parts. The response line consists of the data that you requested from the supplier, such as the pricing information and the price change information. The suppliers receive the RFQ for the items to which they have been assigned.

You can add suppliers to items from the Responses tab either manually or automatically.

Assigning Suppliers Manually

You can add any supplier to any item manually. Agile PLM ignores the dissemination method and assigns the selected suppliers to all the selected items.

To assign suppliers manually:

1. From the Responses tab of an RFQ, select the row(s) of the items to which you want to add suppliers.
2. Choose Supplier > Add.
3. Select the suppliers from the Available Suppliers list and click the right arrow to move them to the Selected Suppliers list.
4. Click OK

Note	To distinguish suppliers, see Supplier Identification (on page 97).

Assigning Suppliers at AML Level

Suppliers can be assigned at AML level in an Item. This makes the RFQ process more efficient and effective, as the Supplier receives an RFQ, and has to respond, only for those Items that it supplies.

From the buyer's perspective, this function helps secure the information about other AMLs in an Item that need not be seen by a Supplier who does not supply them.

To assign Suppliers at AML Level:

1. From the Responses tab of an RFQ, select the row(s) of the AML(s) in an Item, including the Item row, to which you want to add suppliers.
2. Choose Supplier > Add. The *Identify Suppliers and Supplier Groups* window appears.
3. Search, and select the suppliers from the Results. Click right arrow to move them to the Selected list.
4. Click OK

Note	To distinguish suppliers, see Supplier Identification (on page 97).

Auto-Assigning Suppliers

When you auto-assign suppliers to items in an RFQ, the application looks for all the suppliers satisfying the dissemination and rating constraints that you selected. When you auto-assign suppliers to items after the original RFQ creation, you can specify additional auto-assignment rules. Auto-assignment does not remove any current supplier assignments, but adds any additional assignments based on the criteria you define.

To Auto-assign suppliers to items:

1. From the Responses tab of an RFQ, select the row(s) of the item(s) to which you want to add suppliers.
2. Choose Supplier > Auto-Assign. The *Auto-Assign Supplier* window appears.
3. Click button next to the Suppliers field. The *Identify Suppliers and Supplier Groups* window

appears.

4. Search, and select the suppliers from the Results. Click right arrow to move them to the Selected list.

Note	To distinguish suppliers, see Supplier Identification (on page 97).

5. Select a dissemination method from the RFQ Dissemination Method drop-down list.
6. Select ratings from the Available Ratings list. Clickthe right arrow to move them to the Selected Ratings list.
7. Click Ok.

Note	Auto-assign suppliers works only on IPN levels, and is not applicable to AML level.

Expediting RFQ Responses

Tracking supplier response status and expediting delinquent supplier responses is an important part of the RFQ process. You can quickly view the progress of your RFQ and send email notifications to suppliers to remind them that the RFQ response is pending. You can request responses even after the specified due date.

To expedite RFQ responses:

1. From the Response Status tab of an RFQ, select the row(s) of the supplier(s) from whom you require a response.
2. Click Expedite. The Expedite window appears.
3. Enter the subject in the Subject line and the message in the Message field.
4. Click Send.

Note	A notification is sent to the supplier who has not responded to the RFQ. An Expedited ⇧ symbol appears in the 2nd column of the Supplier Response Status table.

Importing Responses from Non-Web Suppliers

Non-Web suppliers are those who do not use the Internet or Agile Web Client. Therefore, RFQs have to be sent to them either as an email attachment or as hardcopy through any appropriate channel. They may return the response lines as an attachment or as hardcopy.

To specify that a supplier does not have Web access, the Supplier Manager sets the Web Supplier field to No on the supplier's General Info tab. In the Agile Web Client, a non-Web supplier is indicated by the icon.

If a non-Web supplier sends you a response line as an email attachment, you can import the file directly into a project. If a non-Web supplier sends you the response line as hardcopy, you need to enter the information in an electronic file and import it. You can import response lines only from non-Web suppliers. If, for any reason, you want to import response lines for a supplier with Web access, ask the Supplier Manager to set the Web supplier status to No temporarily on the supplier's General Info tab.

For information about importing responses from non-Web suppliers, see *Agile Import Export Guide.*

Viewing Responses in Different Currencies

You can view the response lines on the Responses tab of the RFQ. The supplier can respond to an RFQ in their own currency, which can be different from the project currency. You can view and analyze the quote information in either the supplier (original) currency or the project (normalized) currency. Using the normalized currency lets you analyze all responses in a single currency.

When you select the view, Agile PLM calculates and displays the price information based on the currency conversion rates. You select currency views and refresh currency conversion rates from the Responses tab the same way you do from the Analysis tab of a project. For more information, see Converting Currency Values (on page 62).

Looking Up Price Information

You look up price information in the Responses tab the same way you look up for price information in Analysis tab of a project. See Looking Up Price Information (on page 56) for details.

Note	You can look up prices and bring them into an RFQ response only if suppliers are assigned to the items.

Editing Responses

At times, you might need to edit supplier responses so you can negotiate or request that the supplier quote again for the same item. For example, you can ask for a shorter lead time or lower cost by specifying the changes in the response line. The supplier can choose to re-quote or stay with their previous quote.

You can edit a response line when the RFQ and Response lines are in draft state. Otherwise, only the assigned supplier can edit a response line.

To lock response lines:

1. From the Responses tab of an RFQ, select the row(s) of the response line(s) to lock.
2. Choose Responses > Change Response Line Status > Lock.

Once you have locked the response, you can edit the response line.

To edit the response line:

1. From the Responses tab of an RFQ, select the row(s) of the locked response line that you need to edit.
2. Choose Responses > Edit. The *Response Entry Form* page appears. See Response Entry Form (on page 85) for more details.
3. Edit the information as necessary.
4. Click if you have selected multiple response lines, or click Finish.

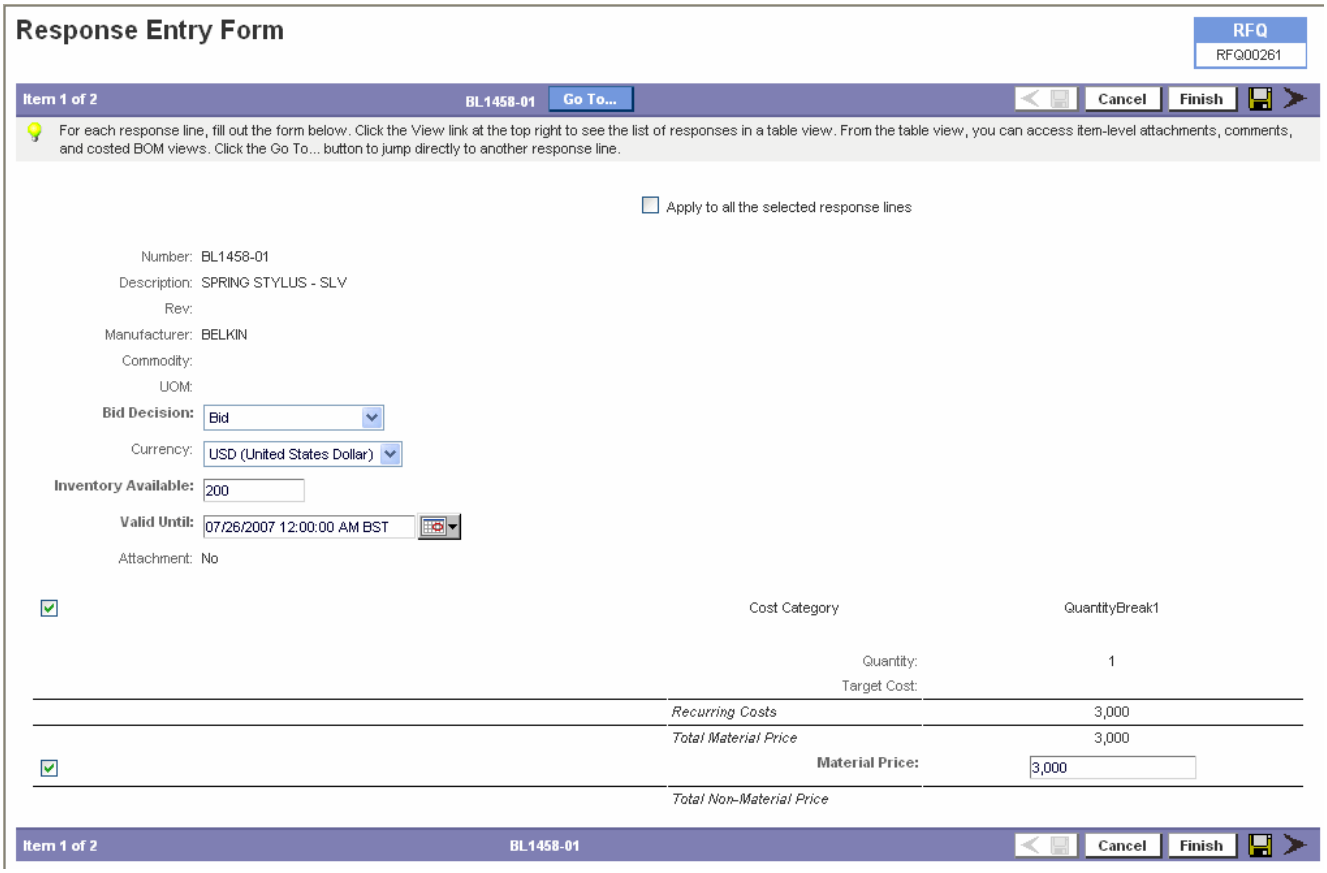
Note	When you check the "Apply to all the selected response lines" checkbox, the Save & Go to Next button turns gray.

Note	If you selected multiple response lines, you can select and edit the response information of any item by clicking Go To on the Response Entry Form page.

In the Responses tab, “Sourcing Manager Edited” appears in the Source Column of the response line you edited. This indicates that this response line has been edited.

Response Entry Form

This is a dynamic entry form, which performs requisite calculations instantly. For example, when you fill a certain amount in Material Price field, and then change it to another amount, the Total Material Price figures change immediately.



In this form, you will notice three Checkboxes

- Apply to all the selected response lines - When you check this, the data (Inventory Avaiable, Material Price, Valid Until, etc.) that you fill in for the current item, is applied to all the other response lines that you selected for editing.
- The Checkbox to the left of Cost Category is for selecting/de-selecting all the Price Fields. It can be called as Check-All-Price-Fields checkbox.
- There is a checkbox for each of the Price Fields (eg, Material Price). If you have checked the Check-All-Price-Fields checkbox, you can selectively deselect the Price Fields whose values you do not want to apply to the other response lines.

When Check-All-Price-Fields checkbox is not checked, or when all the checkboxes across Price Details are unchecked, and you check the Apply to all the selected response lines checkbox, all other values, such as Inventory Available, are applied to the rest of response lines.

This feature is useful when you have to edit many response lines that have more than one Price Details Attributes.

Setting Response Lines as Pre-Quoted

A pre-quoted response line is one for which you don't need a quote from suppliers, perhaps because you are using published prices or existing contract pricing. When you set response lines to be pre-quoted, they are not sent out to suppliers for new quotes.

To set response lines as pre-quoted:

1. From the Responses tab of an RFQ, select the rows of the response lines to mark as pre-quoted.
2. Choose Responses > Change Response Line Status > Set As Pre-Quoted.

Requesting Requotes

You can negotiate with suppliers by requesting that they quote again for an item.

To request Requotes:

1. From the Responses tab of an RFQ, select the row(s) of the response line(s) that require a requote.
2. Choose Responses > Change Response Line Status > Lock.
3. Choose Responses > Edit. The *Response Entry Form* window appears.See Response Entry Form (on page 85) for more details.
4. Click if you have selected multiple response lines, or Click Finish.
5. Select the Apply to all the selected response lines checkbox to use the price and terms information of the current item for all the response lines selected. (Optional.)
6. Choose Responses > Change Response Line Status > Requote.

Note The icon indicates requoted response lines.

Viewing Requote Status

You can view the status of the items that are sent for requote on the Response Status tab of the RFQ. The Open Requotes field in the Supplier Response Status section displays the number of requotes that suppliers have not yet responded to.

To view requote status:

1. Open an RFQ.
2. Select the Response Status tab.

You can see the total number of requotes in the Requote column of the RFQ Status section and the

number of open requotes that need responses from suppliers in the Open Requotes column of the Supplier Response Status section.

Chapter 7

Managing Customers, Commodities, and Suppliers

This chapter includes the following:

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- Roles Required to Manage Customers and Suppliers 89
- Managing Customers 90
- Creating Commodities 92
- Managing Suppliers 94
- Working with the PSRs Tab 102

Collaborating with External Organizations

An organization could be a company, division, department, group, or team. These organizations participate in business processes such as sourcing, quality management, and design engineering and are involved throughout various phases and activities of a program. You can manage organizations outside your own boundaries (such as your customers, your suppliers, your partners, and so on).

As competition increases, customers demand quality product on time and at a lower cost while the product lifecycle time decreases. Agile allows you to effectively support the following business processes in which multiple organizations may be involved:

- Obtain pricing quotes and sourcing proposals for your customers.
- Send out RFQs to obtain pricing quotes from suppliers.
- Capture quality issues reported from your customers.
- Report quality issues resulting from parts or services provided by your suppliers.

Before You Begin

This chapter assumes that you are informed about Product Service Requests (PSRs) for managing problem reports and Non Conformance Reports (NCRs). For more details on PSRs, see the *Product Quality Management (PQM) User Guide*.

Roles Required to Manage Customers and Suppliers

The roles a user requires to manage customers and suppliers are:

- Organization Manager — create and manage customers and suppliers

- Supplier Administrator — manage the organization profile, users, RFx routings, and line cards for a supplier organization
- Compliance Manager — responsible for routing material declarations to suppliers; also create and manage PG&C objects and run PG&C reports

For more details on roles and privileges, see the *Agile PLM Administrator Guide*.

Managing Customers

Customers are clients of your company. You can associate product service requests (PSRs), quality change requests (QCRs), sourcing projects and RFQs, and prices with a customer. You can use the Agile SDK or the Import tool to import customers from CRM systems.

Creating a Customer

You must have the necessary privileges to create customers. These privileges are part of the Organization Manager role. You create a customer the same way you create other Agile PLM objects. You can use the New Object button, the Create icon, or the Save As feature.

To create a customer object in Java Client:

1. Click the New Object button.

   The New dialog box appears. Agile PLM remembers what type of object you created last and displays that type in the Type field.
2. Select a customer type from the Type list.
3. In the Customer Number field, type a number, or Click the Autonumber button to enter a system generated number.
4. In the Customer Name field, type a name. Click OK. The customer is created and the General Info tab is displayed.
5. Complete the fields on this tab. For more information about the Customer Name, and other fields, see customer General Info tab fields table in Customer Fields and Attributes (on page 91).

   You can attach files and URLs to the customer from the Attachments tab. To attach a file, click the down arrow next to the Add Folder Reference icon, and click Add File. To attach a URL, click the down arrow next to the Add Folder Reference icon, and click Add URL.

To create a customer object using the Save As feature in Java Client:

1. In an open customer, right-click anywhere on the window and choose Save As.

   The *Save As* dialog box appears. Java Client automatically fills in the Type and Customer Number fields as they appear in the original customer.
2. If required, select a different customer type from the Type list. Click OK. The customer is created.
3. You can change the information in the fields as necessary. For more information about the Customer Name and other fields, see Customer Fields and Attributes (on page 91)

To create a customer object in Web Client:

1. Click Create > Customer from the main toolbar. The *Create Customers* window appears.
2. Select a customer type from the drop-down list.
3. In the Number field, type a number, or click the Autonumber 123 button to get a system generated number.
4. In the Customer Name field, type a name. Click Continue. The *Customer Creation Wizard* with *Enter Title Block Information* page appears.
5. Complete the fields on this page. For more information about the fields, see Customer Fields and Attributes (on page 91).
6. Click Next to display the *Add Attachments* page. Or Click Finish to create the customer and display the customer with the General Info tab.

   You can attach files and URLs to the customer from the Attachments tab. To attach a file, click Add > Files... To add a URL, click Add > URLs...You also can search for existing attachments to add.

To create a customer object using the Save As feature in Web Client:

1. In an open customer object window, choose Actions > Save As... The *Save Customer (name) As...* page appears.
2. In the Customer Number field, type a number or click the Autonumber button 123 to get a system generated number.
3. Type a new Customer Name.
4. Click Save. Web Client creates the customer and displays the customer with the General Info tab on top.

In Java Client, these buttons are available at the bottom of the customer window:

- The Save button saves modifications made to the fields in the active window.
- The Refresh button updates the window to show the latest information from the Agile database.
- The Close button closes the active window.

In Web Client, use the Edit button in General Info tab on the customer page to edit the general customer information.

Customer Fields and Attributes

The following table lists and describes the fields in the customer General Info tab in Web Client

Field	Completed...	Contains...
Customer Number	When created; type the number or use the Autonumber button. Customer is uniquely identified by the number. (Required)	The number assigned to the customer when you create it. May be an autonumber.
Customer Type	Manually (Required)	Drop-down list of the customer types.
Customer Name	Manually (Required)	The name of the customer.

Field	Completed...	Contains...
Description	Manually	The description of the customer. The maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including space and carriage returns (which count as two bytes).
D-U-N-S Number	Manually	The industry standard Data Universal Numbering System (DUNS) number.
Address	Manually	The mailing address of the customer.
City	Manually	The city where customer is located.
Zip Code	Manually	The zip code of the customer.
Contact	Manually	The name of contact person from the customer side.
Email	Manually.	The email address of the customer.
Phone	Manually	The customer contact phone number.
Fax	Manually	The customer fax number.
URL	Manually	The URL of the customer Web site.
Lifecycle Phase	Manually	The lifecycle phase of the customer. For example, the customer is Active or Inactive in this lifecycle phase.

Editing a Customer

After you have created a customer, you can go back and edit the customer's information at any time.

To edit a customer:

1. Open the customer you want to edit, and display the General Info tab.
2. In Web Client, click the Edit button, and fill out the appropriate fields.

   In Java Client, change the information in the fields as necessary.

   See Customer Fields and Attributes (on page 91) for details.
3. When you are finished, click Save.

Customers are not under change control. Anyone with the necessary privileges can edit a customer at any time. The changes take effect immediately.

Creating Commodities

Commodities let users categorize parts for sourcing and analysis processes. Commodities are associated with items (parts and documents), and a commodity code is part of an item's Approved Manufacturers List (AML). It is a way of grouping similar types of items. By associating each item with a commodity, your users can distribute RFQs to suppliers based on the commodities they offer.

Commodities can be active or inactive. Unlike other Agile PLM business objects, commodities do not have workflows. They are simply used to categorize groups of items.

If your company has a Product Governance & Compliance (PG&C) license, you can use commodities to collect information on restricted substances for part families. For more details on how to use Commodity objects for PG&C, see the separate *Product Governance & Compliance User Guide*.

You can create commodities using Web Client. You can search for commodities in Java Client, but not create them.

Note	To create commodities, you must have the Create privilege for commodities. If you don't, see your Agile administrator.

To create a commodity in Web Client:

1. Choose Create > Part Groups from the global menu bar. The *Create Part Groups* window appears.
2. In the Type list, select Commodity. Other types of Part Groups subclasses may also be available.
3. Specify a unique commodity name, which can be a short abbreviation (such as "Trans" for Transistor). The name is not case-sensitive. Click Continue. The *Commodity Creation wizard appears.*
4. Enter general information, such as a description. Make sure the Lifecycle Phase field is set to Active. The weight field is optional; it is only relevant for Product Governance & Compliance. Click Finish.

   The new commodity appears with the General Info page.
5. Click the other tabs to add additional information about the commodity.

Commodity Tabs

Commodities have the following tabs:

- General Info – Provides general information about the commodity.
- Parts – Lists the Parts that belong to this commodity category.
- Compliance – Lists the Specifications and Compositions of the commodity.
- Attachments – Lists the suppliers who supply this commodity.
- Attachments – Lists the attached files for the commodity.
- History – Shows the history of events related to a commodity.

Note	The Compliance tab is used only for Product Governance & Compliance (PG&C). If your company does not have the PG&C license, this tab may be hidden.

Associating Items with Commodities

A commodity's Parts tab lists all items that are associated with it. This association between commodities and items is important because it determines which parts a supplier will be asked to

quote on when an RFQ is disseminated by commodity.

Note	In the Title Block tab of a Part, the Part Family or Commodity attributes indicates which Part Group this part is associated with. Either of these attributes can be enabled. Both are read-only.

To associate an item with a commodity in Web Client:

1. Open the commodity you want to work with, and go to Contents tab.
2. Click Add. The *Add Content Wizard* window opens.
3. Search for existing items, select items from the Results and move them to Selected cell to associate them with the commodity. Click OK.
4. The Warnings and Errors window appears Edit Newly Added Rows page appears.
5. Once you have search results, select items to associate with the commodity, and then click Next. The Information page appears.
6. The Information page lets you enter a conversion factor for each item. The conversion factor is optional; it is only relevant for PG&C. Click Finish.

Managing Suppliers

An organization manager checks in the organization's PSRs and sets up global supplier groups that can be leveraged by users with the appropriate roles. They can obtain pricing quotes and sourcing proposals for your customers and send out RFQs to obtain pricing quotes from suppliers.

For information on administering PCM supplier organizations, see the chapter "Configuring Product Cost Management" in *Administrator Guide*.

Supplier Types

There are five out-of-the-box supplier types (but you can add more to your Agile PLM system):

- Component Manufacturer — sells individual parts or components
- Contract Manufacturer — manufactures products but does not necessarily own the engineering design
- Distributor — purchases and resells products
- Manufacturer Representative — direct customer representative for a manufacturer
- Broker — responsible for the supply of goods and services to trading partners

Partners and Suppliers

Suppliers may be either partners or suppliers. A partner is one who will receive the complete bill of material (BOM) of the items in the RFQ, and the supplier is one who will receive only the assigned parts. Partners are created by the Agile administrator. The administrator can also create supplier groups, which permit you to easily select multiple suppliers during the RFQ process.

Supplier Lifecycle Phases

The lifecycle phase of the supplier can be either Active or Inactive.

Status	Description
Active	The supplier is currently active and able to receive RFQs.
Inactive	The supplier currently not active. In this status, the supplier cannot be included in new RFQs or price objects.

Creating a Supplier

Use the Supplier Creation wizard to create a supplier organization.

To create a supplier in Web Client:

1. Choose Create > Supplier from the global menu bar. The Supplier Creation wizard appears.
2. In the Supplier Type list, select Broker, Component Manufacturer, Contract Manufacturer, Distributor, or Manufacturer Representative. All of the required fields will be displayed in the supplier creation wizard.
3. Specify a unique supplier number and name. Click Next.
4. Enter general information, including flex field details.

   See Supplier Fields and Attributes (on page 95) describes the fields that appear on the next pages of the wizard. Click Next to add contact users. On any page, you can click Finish to complete this operation. You can view the newly created supplier on the General Info tab.
5. Click the other tabs to add additional information about the supplier. See the corresponding sections in this chapter for information.
6. On the Attachments tab, you can attach files and URLs to the supplier that you are creating. To attach a file, click Add > File. To attach a URL, click Add > URL. When you are finished adding attachments, click Finish.

To edit fields of a supplier, click the Edit button. You may not be able to edit the contents of some fields.

Supplier Fields and Attributes

As with other Agile objects, information about the supplier is displayed on a series of tabs. Each tab contains information about, or related to, that supplier.

Note Some tabs may not be enabled by your administrator.

By default, the General Info tab contains the fields listed in the following table. Agile administrators can add custom class and subclass fields to the General Info tab.

Field	Description
Name	Name of the supplier.

Field	Description
Supplier Type	Indicates one of the following supplier types; configurable by the customer: ▫ Component Manufacturer ▫ Contract Manufacturer ▫ Broker ▫ Distributor ▫ Manufacturer Representative
Lifecycle Phase	Indicates if this supplier is Active or Inactive. Note: Only active Suppliers can participate in product sourcing activities.
Number	The supplier number assigned to the supplier when you create it.
DUNs	The industry standard Data Universal Numbering System (DUNS) number.
Display Name	Indicates the display name
Description	Text that describes the supplier. The maximum length is set by the Agile administrator.
Web Supplier	Indicates if this supplier logs in to the Web Client (Yes or No). If No, they receive offline communication.
Corporate Currency	The default currency for this corporation. By default, RFQs will be responded to in the assigned corporate currency. Supplier users can set their own default currency.
Address	Address
City	City
Postal/Zip Code	Postal or zip code
Phone	Phone number
Fax	Fax number
URL	URL for supplier Web site
Maximum number of Contact Users	The maximum number of supplier users that can be created for this supplier
Maximum Number of Licensed Contact Users	The maximum number of supplier users that can be assigned a concurrent user license
Maximum Number of Power Contact Users	The maximum number of supplier users that can be assigned a power user license

Buttons on the General Info tab

The General Info tab contains the following buttons:

- Edit — appears when the General Info tab is not in edit mode. To edit the General Info tab, click Edit.

- Save — appears when the General Info tab is in edit mode. To save the changes that you made to the tab while it was in edit mode, click Save.
- Cancel — appears when the General Info tab is in edit mode. To undo the changes that you made to the tab while it was in edit mode, click Cancel.

The following sections describe the additional tabs.

Supplier Identification

Sometimes, an organization may have more than one suppliers with identical names. The system does not stop you from giving a name to a supplier that already exists, as internally, they are differentiated by their unique identification numbers. However, as a user, it is difficult to distinguish the desired supplier from a list of identical supplier names.

In Agile PLM 9.2.2.2, the suppliers listings display their identification numbers, in brackets, next to their names. You can notice this in Responses and Analysis tabs in a Sourcing Project, in Supplier Response Export files and in Supplier search results.

When you wish to sort a suppliers list in ascending or descending order, it sorts first on supplier name and then its number.

For example, if a list has supplier Agile1 (SJ001), Agile1 (AG015), Agile1 (sup001), Agile1 (A0001), the ascending order will appears as

Agile1 (A0001)

Agile1 (AG015)

Agile1 (SJ001)

Agile1 (sup001)

Adding Contact Users

The Contact Users tab defines which users can log into Agile PLM to represent a supplier. Supplier users have restricted privileges to the Agile PLM system that allow them to respond to RFQs.

To create a new supplier user in Web Client:

1. Open a supplier and click the Contact Users tab.
2. Click Create User.
3. The *Create User* window appears.
4. Enter the Username. Type the Login Password, and retype it.
5. Enter user details - first name, last name, and email.
6. Click Finish. If you checked the "Continue Creation in Wizard", Click <continue>. The *Create User* window with *Enter Information for "General Info" tab page* appears. Fill the requisite fields (in Bold) and Click Next.

   Make sure the Status field is set to Active. Here are other fields you should consider changing:

   - Role — The user's role assignments. This property determines a user's access to the objects in Agile PLM from the point of discovery forward.
   - User Category — Agile PLM has three types of user licenses: Power, Concurrent, and

Restricted. Restricted users are people outside your company (such as suppliers) who are given limited access to the Agile PLM system. Power users are not subject to concurrency counts and can therefore log in at any time. Both Restricted and Power users can respond to RFQs, but only Power users can generate and view reports.

- Sites and Default Site — Sites are used for distributed manufacturing, and indicate all of the company's locations where the user is involved. Default Site is the user's main base of work.
- Authorized Ship To and Home Ship To — Authorized Ship To indicates all company locations where the user can initiate sourcing activity. Home Ship To is the primary location where the user is responsible for sourcing activities.

When you finish setting user details, click Next. The *Add Contact Users* page appears.

7. Specify System Preferences, Format Preferences and Display Preferences. Click Finish to create the contact user.

To add an existing PC Supplier as a PCM Supplier in Web Client:

1. Assign the desired restricted Supplier role to the User.
2. Open the Supplier.

Note	Power Users can be added to the Contact Users tab only if the Maximum Number of Contact Power Users field has been set to other than 0 (or blank) on the General Info tab of the supplier. Otherwise, only users with a Restricted user license can be assigned to a supplier.

3. Search for the user and add it to the Supplier's Contact Users tab.
4. If applicable, on RFx Routing tab, select the user as the Default Recipient.
5. Under the Users Preferences - Display Preferences change Response Edit Mode to either Advanced Wizard Edit or Advanced Table Edit.

Note	If the Response Edit Mode is set to Basic, the user will not have access to PC related tasks.

To add an existing user to a supplier in Web Client:

1. Open a supplier, and then click the Contact Users tab.
2. Click Add Users.

   The Single Value Selection window appears.
3. Search for an existing user by first name, last name, or username.

Note	Power Users can be added to the Contact Users tab only if the Maximum Number of Contact Power Users field has been set to other than 0 (or blank) on the General Info tab of the supplier. Otherwise, only users with a Restricted user license can be assigned to a supplier.

4. Select a user, and click OK.

   The user appears on the Contact Users tab.

Creating and Modifying RFx Routing Rules

The RFx Routing tab defines which supplier contacts are responsible for which RFQs. You can specify which supplier contact will respond to RFQs coming from a given ship-to location. These routing rules are geography-based.

When you specify a routing rule, you associate a supplier contact user with a geography. That contact user is then responsible for RFQs coming from ship-to locations in the specified geography. Geographies are defined as a Continent, Country, and Region. A rule can be specified broadly, by continent, or specific to a region.

When you create a supplier, the first contact user you add becomes the default RFQ recipient. The default recipient will receive any RFQs that could not be routed based on a routing rule. You can change the default recipient at any time.

To add a new routing rule:

1. On the RFx Routing tab, select the default recipient. Click the Create button. The Add RFQ Route wizard is displayed.
2. Specify the continent, country/area, state/province/region, and owner to associate the contact user with a geography, and click Finish.

To edit a rule:

1. Select the routing rule that you want to modify on the RFx Routing tab. Click the Edit button.
2. Make the required changes. To save the changes that you made to the RFx Routing tab while it was in edit mode, click Save. To undo the changes that you made to the RFx Routing tab while it was in edit mode, click Cancel.

To delete a rule:

1. Select the routing rule that you want to delete.
2. Click Delete button on the RFx Routing tab. A message appears for you to confirm whether or not you want to delete the routing rule. Click OK in the confirmation message to delete the routing rule.

To change the default recipient:

1. Click the button in the Default Recipient field on the RFx Routing tab.
2. The Select User window opens. Select the default recipient, and click OK. The changed default recipient is displayed in the Default Recipient field on the RFx Routing tab.

Defining Manufacturer and Commodity Offerings

Each supplier can have different manufacturer and commodity offerings.

- Manufacturer offerings map each manufacturer whose goods a supplier carries to a specific geographic location where those goods are available. This is a way for suppliers to indicate the manufacturers whose goods they are franchised to offer in certain geographic regions. For example, a supplier called ACME might sell Motorola and Kemet products.
- Commodity offerings define the product categories that a supplier sells. For example, a supplier called ACME might sell commodities such as fuses, integrated circuits, and resistors. The

commodity offerings map each commodity a supplier carries to a specific geographic location where those goods are available.

You can filter manufacturer and commodity offerings based on criteria that you specify. For example, you may want to see only the offerings for a particular region.

The ratings for manufacturer and commodity offerings determine which suppliers receive RFQs. The out-of-the-box supplier ratings provided with Agile PLM are:

- Approved
- Strategic
- Offered Active
- Offered Inactive

Note	Agile PLM administrators can define additional supplier ratings. There is no implied order to the supplier ratings. When you disseminate an RFQ, you can select multiple supplier ratings.

Creating a New Manufacturer Offering

You can specify general information about the manufacturer offerings that you are creating from the Manufacturers tab. Each manufacturer line card definition is a unique combination of manufacturer, supplier, and ship-to locations. A supplier can have multiple lines for one manufacturer, each line associated with a different ship-to location. If there are changes to the geographic locations where the goods are offered, the supplier manager can edit the manufacturer line cards for the supplier organization.

To create a new manufacturer offering in the Web Client:

1. Open the supplier you want to work with, and click the Manufacturers tab.
2. Click the Create button.

   The Define Manufacturer Offerings page appears, the first page of the Create Manufacturer Offerings wizard.
3. For Manufacturer Name, click the button to select one or more manufacturers. Once you've searched for and selected manufacturers, click Finish to return to the Create Manufacturer Offerings wizard.
4. For Define By, select the appropriate radio button to base the offering on the geographic location or ship-to locations.
5. If you selected "Geography" for Define By, click the button next to Continent, Country/Area, and State/Province/Region to select the geographical area. To include all regions included within a geographical area, make sure the All box is checked.
6. If you selected "Ship To" for Define By, click the button next to Ship To to select the locations.
7. Select a supplier rating (for example, Approved or Offered Active).
8. Click Finish to complete the operation. The new manufacturer line card definition appears in the list.

Creating a New Commodity Offering

From the Commodities tab of a supplier, you can specify information about the commodity offerings for that supplier. Each commodity line card definition is a unique combination of commodity, supplier, and ship-to locations. A supplier can have multiple lines for one commodity, each line associated with a different ship-to location. If there are changes to the geographic locations where the goods are offered, the supplier manager can edit the commodity line cards for the supplier organization.

Before you can specify commodity offerings for a supplier, commodities must be defined in your Agile PLM system. See Creating Commodities (on page 92).

To create a new commodity offering in Web Client:

1. Open the supplier you want to work with, and click the Commodities tab.
2. Click the Create button.

   The Define Commodity Offerings page appears, the first page of the Create Commodities Offerings wizard.
3. For Commodity Code, click the button to select one or more commodities.
4. For Define By, select the appropriate radio button to base the offering on the geographic location or ship-to locations.
5. If you selected “Geography” for Define By, click the button next to Continent, Country/Area, and State/Province/Region to select the geographical area. To include all regions included within a geographical area, make sure the All box is checked.
6. If you selected “Ship To” for Define By, click the button next to Ship To to select the locations.
7. Specify a supplier rating (for example, Approved or Offered Active).
8. Click Finish to complete the operation. The new commodity line card definition appears in the list.

Updating Manufacturer and Commodity Ratings

Each line on the Manufacturers tab and the Commodities tab represents the combination of a supplier, manufacturer or commodity, ship-to locations, and ratings. You can change ratings one line at a time, or you can change multiple lines at once.

Note	You can rate the manufacturer or commodity offerings only when ship-to locations are specified and the type is Rating.

To update manufacturer and commodity ratings in the Web Client:

1. On the Manufacturers tab or Commodities tab of the supplier, select the checkbox for each line in the table that you want to update.
2. Click Update Ratings. The Select Rating window appears.
3. Select the rating you want from the drop-down list. The updated line card definition appears in the list with the new rating.

Working with the PSRs Tab

The PSRs tab of a customer or supplier lists all product service requests reported by a customer. It can help gauge customer satisfaction with your products. This tab is read-only and is automatically completed whenever this customer is added to a PSR.

PSRs can be closed (promoted to their Complete type status) in the following ways:

- The Agile administrator can set up the system so that a problem report closes automatically when the related issue closes.
- The Agile administrator can set up the system so that a PSR (problem report or issue) closes automatically when the related PSR closes.
- An organization manager or supplier administrator with the appropriate privileges can manually close a PSR.

Refer to the *Product Quality Management (PQM) User Guide* for more details on PSRs, including initiating and managing PSRs.

Chapter 8

Changes, Discussions, and Attachments

This chapter includes the following:

- Item and Response Changes 103
- Discussions 104
- Attachments 106

Item and Response Changes

Sourcing projects serve as a knowledge repository of the items, BOMs, AMLs, RFQs, responses, as well as changes related to those objects. Changes to the items and responses in a project can be tracked on the Changes tab. You can view the changes made to the items and responses separately, and you can filter the data to view only items that have been added, deleted, or changed.

Changes to items and responses can be made in several ways:

- When new change orders (ECOs, MCOs, and SCOs) are submitted for Item Master items contained in the project. Until you update the project with information from the Item Master, these changes are *Unapplied Changes*.
- When you update the Quantity Per Assembly (QPA) for items with information from the Item Master. Other changes to item descriptions or flex fields are not recorded on the Changes tab.
- When you add, modify, or remove project items either manually or using the Import wizard.
- When RFQ responses are submitted by suppliers.

To view unapplied item changes:

1. Open a project and select the Changes tab.
2. The default view of the Changes tab is Unapplied Item Changes. All the unapplied changes like ECO, MCO, SCOs are listed in the table. Affected items for each change are listed in the Affected Item(s) column.

   If for any reason, the manufacturing division changes the item content in a project for specific output, the changes are recorded in this view. You can link to the details of the ECO, MCO, or SCO. After viewing details of the change, you can decide whether to update the project with latest information from the Item Master.

To view item changes:

1. Open a project and select the Changes tab.
2. Choose Views > Items to view item changes. By default, the changes summary table and the added items are displayed. The Changes Summary table displays the number of changes made to the items in the project.

3. Select the date from the Changes Since drop-down list to view the changes made to the project items since the date selected.
4. Click Added, Changed or Deleted to view the added, changed, or deleted items in the project.

Note	You can view the item changes made in the project since the project creation.

To view response changes:

1. Open a project and select the Changes tab.
2. Choose Views > Responses to view response changes. The response changes made in the project are displayed in the table. You can click the item number to edit the project item information.
3. Select the date from the Changes Since Calendar drop-down list to view the response changes made since the date selected.

Note	You can update the Responses table by selecting a date from the Changes Since calendar. The changes made since the date selected are displayed in the table.

Discussions

When you are negotiating with your suppliers and customers, you often need to conduct informal, threaded dialogue to finalize the quotes, discuss issues related to your projects and RFQs, and to share various other information.

Discussions in Agile PLM replace the conventional email messaging service. Discussions have features similar to the email model, which has a subject line, message area, priorities you can specify, and a notification list. You can reply to discussions the way you reply to an email. The discussion is sent to the recipients as a notification in their inbox. Only Agile users can participate in discussions.

The Discussions tab lists information about each message, including the number of replies, the message, the creator, and the notification list.

Adding Discussions

You can add discussions about different subjects. For example, MMY Suppliers have bought Agile PLM, and you need to send project information along with a welcome letter. You can send the welcome letter through the project discussion. You can add any number of discussions in a project.

To add discussions:

1. Open a project and select the Discussions tab.
2. Click Add. The Add Discussions Wizard appears.
3. Select the Create button, and select the discussion type from the drop-down list.
4. Click Next. The Enter General Information page appears.
5. Enter the subject in the Subject field.
6. Enter discussion text in the Message field.

7. Select the priority of the message from the Priority drop-down list.
8. Click the button next to the Notify List field, and select the names of recipients.
9. Click Finish. The discussion is sent as a notification to the respective suppliers or customers.

Replying to Discussions

Replying to a discussion is similar to replying to an email. You can find the discussion notification in your Inbox. You must have the Discussion Participant role assigned to you to reply to an discussion.

To reply to discussions:

1. In the navigation pane, click Notifications & Requests under your inbox.
2. On the Notifications & Requests page of your inbox, click the subject in the Regarding column. The Cover Page tab of the discussion appears.
3. Display the Replies tab.
4. Click Add. The Discussion Reply window appears.
5. Enter the reply in the Message field.
6. To change the list of recipients, click the button next to the Notify List field.Select the names of recipients, and click OK.
7. Click Save.

Note	You can send any number of replies in a discussion. On the Discussion tab of the project, click + next to the subject to view a list of the replies.

Removing Discussions

You should be the owner of the project to remove a discussion from the project. If you have the [Restricted] Discussion Participant role, you can delete the individual messages, or replies, in a discussion.

To remove discussions:

1. Open the project, and click the Discussions tab.
2. Select the option button next to the discussion to be removed.
3. Click Remove.

Note	When you delete a discussion, any replies are also deleted.

To remove messages in a discussion:

1. Open the project, and click the Discussions tab.
2. Click + to the left of a discussion subject to expand the list of its messages.
3. Select the option button next to the message to be removed.
4. Click Remove.

Attachments

Attachments are electronic files that contain related information about a project, item, change, or other object. An attachment can be of any file type, such as a blueprint (a CAD diagram) of a mechanical device, the architecture explanation flow chart (an MS Word file), or a presentation file related to the object (.PPT, audio, or video). Agile supports viewing any type of file using Agile Viewer. You can either download it or view it from its own location.

The attachments added to the object are stored in a unique folder by default. You can add different versions of the same file and view the appropriate versions at any time.

You can reference the files and URLs related to a project on the Attachments tab of the project.

Attachment features are described in detail in *Getting Started with Agile PLM*. This section provides a brief summary of how attachments can be used in sourcing projects.

Project Objects that Can Have Attachments

In addition to the project itself, the following objects contained within a project can have attachments:

- Items
- Manufacturer parts
- RFQs

Adding Attachments

You can attach most file types, but users viewing the file can open it only if the appropriate software is installed on their computers.

For example, if the file is a Microsoft® Excel (.XLS) file, you need to have Microsoft® Excel installed to view the file. The Attachments tab information shows the file description, name, version, type, and size, as well as the dates the file was modified and viewed.

To add an attachment:

1. Open the object for which you want to add an attachment.
2. Display the Attachments tab.
3. Choose Add > Add File. The Add File window appears.
4. Type the filename, and continue with step 6. Or click Browse. The Choose File dialog box appears.
5. Select the file and click Open to upload the file.
6. In the Add File window, enter the description for the file attachment in the Description field.
7. Click Browse to add more files.
8. Check the Add All Files to a Single Folder check box to add all the selected files to a single folder.
9. Click Finish.

Viewing Attachments

You can either view a file attachment from Agile Web Client, or you can download it to your computer for viewing or editing.

To view an attachment in Agile Viewer:

1. Open the object for which you want to view an attachment.
2. Display the Attachments tab.
3. Click the name of the file you want to view. The file is opened in the Agile Viewer.

To save the attachment:

1. Open the object for which you want to view an attachment.
2. Display the Attachments tab.
3. Click the Get button for the attachment you want to download. The Get Attachment window appears, followed by the File Download dialog box.
4. Select Save this file to disk, and click OK. The Save As dialog box appears.
5. Select the location, and click Save. The file is saved.

Chapter 9

Managing Price Information

This chapter includes the following:

- About Contract Management 109
- Pricing Overview 110
- Managing Price Information 111
- Managing Price Lines 114

About Contract Management

Contract Management is a key component of managing product costs. To effectively reduce the cost of products, you should be able to assess and leverage price and terms information as established throughout the organization. Agile PCM provides you with a single controlled process for doing this.

You can store information about different prices for different items. From the sourcing project, you can publish price information to the Item Master. Users in departments throughout the organization can access this information to use in finalizing the prices for an item or manufacturer part. You can share the new price information from one company with other companies as part of the process of finalizing prices.

For example, the price manager might get information from a supplier about a price change for a particular item (a new, reduced item price). The price manager changes the price information by creating a new price line, publishes it to the repository, and routes it through the workflow for signoff.

Price objects are created automatically when you perform the following actions in a sourcing project:

- Publish prices — By publishing prices from a project to the Item Master, you automatically create price objects associated with Item Master items and manufacturer parts. You can select which type of price objects to create, such as contracts, published prices, or quote histories. You can publish prices in Authoring or Redline mode; if you use Redline mode, you must specify a PCO. For more information about publishing prices, see Publishing Prices for Items and Manufacturer Parts (on page 60).
- Lock or close an RFQ response line — When you lock or close a response line in an RFQ, you automatically create a snapshot of that quoted price by generating a Quote History object.

Note	Whether Quote Histories are created automatically depends on how the SmartRule called Auto Publish Quote History is configured. If the SmartRule is set to Disallow, Quote Histories are not automatically created when you lock or close an RFQ response line. For more information about SmartRules, see *Administrator Guide*.

Pricing Overview

This section covers the following topics:

- Objects in Price Routines
- Associated Roles and Privileges
- Price Types

Objects in Price Routines

A price routine is the flow of the price information of any item or manufacturer part. Pricing information is provided by the supplier. You can publish this information to the respective item or manufacturer part. A price routine involves three basic objects in Agile PCM:

- Prices
- Price Lines
- Price Change Orders (PCOs)

Prices

The Price is an object where you record the price and terms conditions of items and manufacturer parts with relation to the supplier, customer, program, and manufacturing site. You create prices for items or manufacturer parts. A price is a routable object, so it follows a workflow. A price object can have multiple price lines. You can add it to any PCO without having to create a new PCO.

The Price objects have certain limitations:

- A price object can have only one pending PCO. You cannot create PCOs for a price object when a PCO for the same price object already exists and is pending.
- The (Restricted) Price Collaborator role is intended for supplier users. Price Collaborators can create published prices and PCOs for their items and manufacturing parts only.

Price Lines

Price lines contain the core price information about an item or manufacturer part, which is unique by quantity, Ship To location, and Effectivity Period. You can create any number of price lines within a price object, but they should be uniquely identified. Price lines have the general information of the price object.

Price lines have certain limitations:

- Users with the Price Administrator or Price Manager role can create price lines, since they are also responsible for creating price objects.
- Price collaborators can create price lines for their items and manufacturing parts only.

Price Change Orders (PCOs)

A Price Change Order, or PCO, is a process for revising, or deleting, the price information about an object. A PCO follows a workflow from the Preliminary through the Signoff phase. A PCO can have multiple Price objects, and a price can be added to any existing PCO. You can use a PCO to redline the price line information of any price object.

For more information about PCOs, see Price Change Orders (on page 117)

Associated Roles and Privileges

You can control price information for items in Agile PCM through three important roles. The privileges for these roles are assigned by the Agile administrator and can be different for different users with the same role.

The Contract Management related roles are:

- (Restricted) Price Collaborator — Users with this role have limited privileges for managing pricing information through price and price change order creation. This role is typically provided to suppliers.
- Price Administrator — Users with this role have privileges allowing them to control contract management activities, including the price change order process. Users with this role are also called as Approvers. They have the privilege to review and release PCOs.
- Price Manager — Users with this role have privileges for managing pricing information through price and price change order creation. These users cannot review or release PCOs, and so they are not the approvers of PCOs.

Price Types

The prices in Product Cost Management are categorized into three different types:

- Contract — Contract prices are prices provided by the supplier for a specific item or manufacturer part. This price information applies only for the specified duration and can apply to any project.
- Published Price — Published prices are prices provided by the suppliers in response to an RFQ and published from the project. The published price information can also be used in other projects.
- Quote History — Quote history prices are the stored prices from supplier responses that you can use. Any change in the response line of an RFQ is stored in the historical response and can be used at any time.

Managing Price Information

Managing price information is a critical task for any organization. The price administrator should closely follow the pricing information about items and update it in the Item Master.

This section covers the following topics:

- Accessing Price Information

- Creating Prices
- Price Page Tabs

Accessing Price Information

Each item or manufacturer part has associated price information. Any number of price objects can be created for an item, and any number of price lines can be created in a price object, which are identified by their unique combinations of ship-to location, quantity, and effectivity period.

To access the price information for an item:

1. Open an item and select the Prices tab. The prices are displayed (if any).
2. Click the Price Number in a row. It opens a General Information page of the Price. Go to Price Lines tab to view more details.

Creating Prices

Agile PCM creates prices automatically when you publish prices from a project to the Item Master or when you lock or close an RFQ response line. You can also use the Price Creation Wizard to create prices for items and manufacturer parts.

Note	To create prices, you must have the Create privilege for price objects. Agile provides two roles that let users create prices - Price Administrator and Price Manager.

To create a price for an item:

1. Open an item and go to Prices tab.
2. Click Create. The *Create Prices* window appears.
3. Select Subclass, Identify Name page of the Price Creation Wizard appears.
4. Select a price type from the Price Type drop-down list. A unique, system generated number is automatically filled in the Number field on the basis of Price Type you selected. You may modify this number or give one of your own. Or click 123 to generate a new number.
5. Select the type of object (Item or Manufacturer Part) from Item/Manufacturer Part drop-down list.
6. Click button to search and select an item or manufacturer part from *Search Object* window. It fills up the field with corresponding part number.

   If you selected Item from Item/Manufacturer Part list, a Rev drop-down list appears for you to select its Revision, for example, Introductory.

   If you selected Manufacturer Part in Item/Manufacturer Part list, the Rev drop-down list does not appears as its revision is not in your control.
7. Select the Manufacturing Site from the drop-down list.

   If a manufacturing site is selected, the item price information applies to the items or manufacturer parts manufactured only at that site. If the field is left blank, the price information applies to the item or manufacturer part regardless of their manufacturing site.
8. Click button to search and select Suppliers through *Identify Suppliers* windows.

You can select ONLY those suppliers who submitted the price information. The system does not permit selection of any other supplier(s). It pops up an Error message when you do so.

9. Select a Program from its drop-down list.

   If a program is selected, the item price information applies only to that program. If All is selected, then the item price information applies to all programs.

10. Select a Customer from its drop-down list.

    If a customer is selected, the item price information applies only to that customer. If All is selected, the item price information applies to all the customers.

11. Click <continue>. The *Enter Title Block Information* page appears.
    a. Enter any information about the price in the Description field.
    b. Click the button next to the Owner field, and select the owner from the list.
    c. Click the button next to the Authorized Suppliers field, and select the authorized suppliers of the item from the list.
    d. Select the End of Life Date, of the item or manufacturer part as given by the supplier from the Part EOL Date calendar drop-down list.
    e. In the Min field, enter the minimum quantity that should be ordered from the supplier.
    f. In the Mult field, enter the number of units in a package.
    g. In the Inventory field, enter the available stock.
    h. Enter other information as required.

12. Click Next. The *Add Price Line* page appears. For information about adding price lines, see Creating Price Lines (on page 114).

13. Click Next. The *Add Attachments* page appears.

14. Add attachments as necessary, and click Finish. For information about adding attachments, see *Getting Started with Agile PLM*.

Price Page Tabs

The tabs on the Price page store information about price and term attributes, attachments for an item or manufacturer part that is associated with a supplier, customer, and program, and other information.

General Information	This tab displays basic information about the price, including information controlled by the workflow, item and manufacturer part attributes, and supplier-supplied information. Click Edit to edit the information on this tab.

Changes	This tab displays pending and historical changes that affect the price. Any unreleased price change orders (PCOs) where this price is listed on the Affected Prices tab are listed in the Pending Changes table. The Change History table displays any released PCOs where this price is listed on the Affected Prices tab. Agile PCM automatically fills in the information on this tab. The changes listed are those that apply to the revision specified in the Rev field at the top of the page. Note Although its name is similar, the History tab shows all actions taken on a price, while the Change History table on the Changes tab lists released and canceled changes for the price. The Changes tab is not displayed if the price type is Quote History.
Price Lines	A price line is a unique combination of Ship To location, ship-from location, effective-from date, effective-to date, and quantity that applies to a price. A price can have multiple price lines, based on specific contexts. Overlapping price lines can occur when all or some of the effectivity periods of one price line fall within the effectivity periods of a second price line, and all other attributes are the same. Check with your Agile administrator to determine if overlapping price lines are allowed.
Attachments	This tab lists the files and URLs attached to the price. The History tab shows a summary of actions taken on the price object. For more information, see *Getting Started with Agile PLM*.

Managing Price Lines

Price lines contain unique price information about the item. Price lines store information about prices and terms that apply to specific quantity breaks.

You can change price lines after they are published through price change orders (PCOs). For more information about PCOs, see Price Change Orders (on page 117). However, you can also redline price information, which is sent for review and release before you use the changed information. For more information about redlining, see Redlining Price Information (on page 121).

You can see price line information on the Price Lines tab of the price object. The price line information is created or modified in the Add Price Line window.

Creating Price Lines

You create price lines from the Price Lines tab of an Item.

Note	Users with the Price Administrator and Price Manager roles can create price lines for any item or manufacturer part. Users with the Price Collaborator role can create price lines only for items or manufacturer parts they supply.

To add price lines:

1. Open a price object and go to Price Lines tab.

2. Click Add. The *Add Price Line* window appears.
3. Enter the mandatory fields
    1. Select the Ship To locations from its drop-down list.
    2. Select a date from the Price Effective From Date calendar.
    3. Enter Quantity for which the price line information applies in the Qty field.
    4. Select the supplier currency from the Currency Code drop-down list.
4. Enter the optional data
    1. Change the currency conversion date, if necessary, in the Conversion Date calendar.
    2. Enter the material price per unit in the Material Price field.
    3. Enter the non-recurring cost in the Non Recurring Cost field.
    4. Enter the lead time for supply in the Lead Time field.
    5. Select the Transportation Terms from the drop-down list.
    6. Select the Country of Origin of the item from the drop-down list.
    7. Enter any comments or additional information in the Price Line Notes field.
5. Click Finish.

Modifying Price Lines

You can modify the price line information on the Price Lines tab.

To modify the price line information:

1. Open a price object and go to Price Lines tab.
2. Select the row(s) of the price line(s) that you want to change, and click Edit.
3. Edit the price line information in the Price Line table.
4. Click Save.

Removing Price Line Information

You can remove price line information from the Price Lines tab.

To remove the price line information:

1. Open a price object and go to Price Lines tab.
2. Select the row(s) of the price lines(s) you want to remove.
3. Click Remove.
4. Click OK in the confirmation message box.

Importing Price Lines

You can import the Price Lines from the responses submitted in an Excel workbook. The responses in a workbook belong to a particular Price object. When you import them, the system appends the

associated price objects, and not elsewhere.

To import an Excel worksheet -

Note For complete details on import process, see Agile Import Export Guide. The following steps give you only a quick start.

1. Select Import from Tools drop-down list on the main menu bar. The *Import Wizard | Import Source* page opens.
2. Click the Browse button to select the Excel workbook that contains the supplier responses.
3. Click the radio button of Excel Workbook to select a File Type. You may Click Configure to make any modifications in its configuration.
4. Click Next. The *Select Contents to Import* page appears.
5. Select Published Price and Published Price Lines radio buttons and Click Next. The *Select Change Order and Mapping* page appears.
6. Select or create a mapping file. Click Finished. The Price Lines tab page of the Price object appears, listing all the price lines that were in the Excel workbook.

Note The number of price lines that can be imported in a single import process depends upon the system/server configuration. See Capacity Planning Guide for more on server sizing.

Important If the number of price lines is high, Agile recommends you to split them into multiple Excel workbooks for import. In the Authoring mode, each workbook should not exceed 5000 price lines, and in the Redlining mode, it should be less than 1000.

Chapter 10

Price Change Orders

This chapter includes the following:

- About Price Change Orders 117
- Managing PCOs 117
- Redlining Price Information 121

About Price Change Orders

You control any changes that need to be made to prices through a price change order (PCO). PCOs are routed through workflows, from the Pending phase through the Released phase. Through a PCO, you can release a price, redline the price information, and track the history of the price information.

You create PCOs for price objects only. A PCO can contain multiple prices that can be associated with different items, but a price cannot contain more than one pending PCO.

Managing PCOs

Price change orders control changes to the prices of items or manufacturer parts. The price administrator can create PCOs, and the price collaborators can publish the prices of items from the response lines of RFQs.

This section covers the following topics:

- Creating PCOs
- Adding Price Objects to PCOs
- Workflows
- Adding Objects to the Relationships Tab

Creating PCOs

You can create PCOs from prices or from the Create menu on the main menu bar. When you create a PCO from the Actions menu of a price, the price is associated with the PCO by default. When you create the PCO from the Create menu, you must associate the price with the PCO manually.

To create a PCO from the Create **menu:**

1. Click Create > Changes > Price Change Orders. The *Create Price Change Orders* window appears.
2. Select PCO Type from its drop-down list. A unique number is automatically generated and

inserted in the Number field, which can be modified, if required. Or click 123 to get another system-generated number.

3. Click <continue>. The *PCO Creation Wizard* page appears with *Enter Cover Page Information* page.
4. Select a category from the Change Category drop-down list.
5. Enter the Description of Change and the Reason for Change in the corresponding fields.
6. Select a Reason Code and Workflow from the corresponding drop-down lists.
7. Click ... next to the Price Admin. It opens a window to find and select a price administrator from the list of users to whom the PCO should be forwarded.
8. Click ... next to the Originator. It opens a window to find and select a originator from the list of users. By default, the originator is the user who creates the PCO.
9. Change the Date Originated from the calendar to stamp the date of origination of the PCO, if it is different from today's date.
10. Click ... next to the Product Lines to select the affected product lines.
11. Click Next. The *Affected Prices* page appears.
12. Click Add to add the price of the item. The *Add Affected Prices Wizard* window appears.
13. Search and select the affected prices using simple or advanced search.
14. Click Next. The *Add Attachments* page appears.
15. Click Add to add relevant files to the PCO. For more information about attachments, see *Getting Started with Agile PLM*.
16. Click Finish.

To create a new PCO from the Price object:

1. Open a Price object.
2. Choose Actions > Add to Change > Create New ... The Create Changes window appears.
3. Select a PCO from the Change Type drop-down list.A unique Number is generated by the system and inserted in the Number field.
4. Click <continue>. The *PCO Creation Wizard* with *Enter PCO Information* page appears.
5. Follow *steps 4 through 16* from the procedure To create a PCO from the Create menu

Upon completion, the PCO Cover Page tab appears. Go to Affected Prices tab to see the current values for the price object. Edit the values as required.

You can add relevant attachments to the PCO on the Attachments tab. You can view the log of actions on the History tab. For more information, see *Getting Started with Agile PLM*.

Cover Page Tab

This tab displays general information about the PCO, including the unique identification number of the PCO, the current workflow status of the PCO, the description of the change, and the reason for

the change.

You can edit the Cover Page tab by clicking the Edit button.

Affected Prices Tab

The Affected Prices tab displays information about the prices associated with the PCO. You can make changes to the price information through redlining. You can see the history of the redlined information on this tab.

You can click the Price Number in the table to view the price information.

You can redline price information on this tab. For information about redlining, see Redlining Price Information (on page 121).

Adding Price Objects to PCOs

You can add any number of price objects to a PCO, but a price object can contain only one pending PCO. Once a price is published, you must create a PCO to make even a small change in the price information.

You can add an existing price to the PCO. Or you can create a new price for any item or manufacturer part and add it to the PCO. You can also create price lines for the item or manufacturer part, but this is not required.

To add existing prices to a PCO:

1. Open a PCO and go to Affected Prices tab.
2. Click Add. The *Add Affected Prices Wizard* window appears.
3. Select a method to search for existing prices. For information about searching for Agile objects, see *Getting Started with Agile PLM*.
4. Select one or more price objects, and click OK.The *Edit Newly Added Rows* page appears.
5. Click Add More to add more price objects, if necessary, and click Finish.

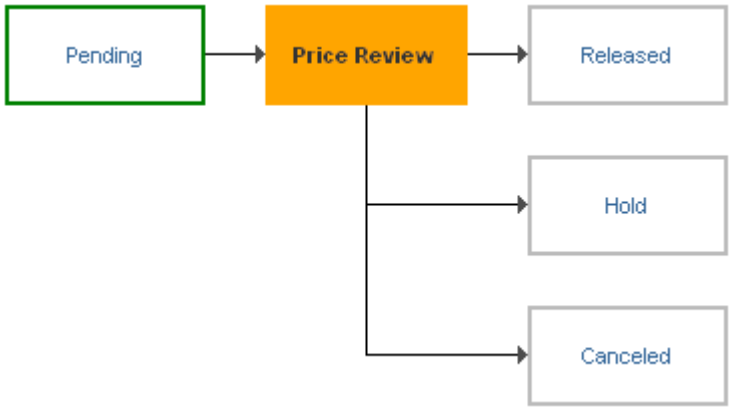
Applying the Effective Date

You can apply the effective date of the price using the Auto Populate Effective Date window.

To apply the effective date:

1. In the Affected Prices tab of a price object, select the row(s) of the price rows in the table.
2. Click Auto Populate Effective Date. The *Auto Populate Effective Date* window appears.
3. Select the date from the Enter a Date calendar.
4. Check Apply to All Items to apply the selected date to all the selected price objects.
5. Click Set Date.

Workflows



The Workflow tab displays information about the workflow of the PCO in the form of a flow chart. A PCO begins in the Pending phase and ends in the Released phase. The price information in the PCO takes effect when the PCO reaches the Released phase. However, the PCO can be cancelled or put on hold during any phase.

A user with the appropriate role submits the PCO and forwards it to the next phase by notifying the price reviewer. The price reviewer receives the notification, reviews the price information, makes any necessary modifications, and then notifies approvers, observers, and other appropriate users. They review the price information sent by the price reviewer, make any necessary changes, and pass it on to the next stage for implementation.

You can view the Sign off Summary Status of Price Review and Sign off History tables of the PCO in the Workflow tab. You can view the workflow by clicking the Show Workflow Overview button. This button changes to Hide Workflow Overview to close the view.

Only price administrators, who are also approvers, can approve or reject a PCO. Observers are those who analyze the PCO and give their comments. Notifications regarding the PCO can be sent to other users such as suppliers and customers.

You can add or remove approvers and observers by clicking Add Approvers/Observers or Remove Approvers/Observers. The approvers can approve or reject the PCO by clicking the Approve or Reject button.

The workflow may have multiple phases depending on your requirements. The Agile administrator can customize the workflow. For more information about workflows, see *Getting Started with Agile PLM*.

Adding Relationships

In the Relationships tab, you can add the information about objects that affect the PCO status and add Rules to those objects. You can add multiple objects but objects in their Released state cannot be added to either table.

You can add objects either by Creating new or by performing a search.

To add objects by Search:

1. Open a PCO and go to Relationships tab.
2. Click Add > Search. The *Add Relationship* window appears.
3. Search for an object by selecting a object Type from Search for drop-down list and entering a search parameter.
4. Select the object(s) from the results table and Click Add Selections button. The selected object(s) appear in the column below.
5. Check the Edit Rows after adding box if you wish to make any changes in the added objects.
6. Click OK. If you checked the Edit Rows after adding box, it will lead you Edit page. Else it will bring you to the Relationships tab.

Applying Relationship Rules

Once you have added relationship objects, you can select them one by one and add their relationship rules.

Redlining Price Information

You can publish price information to the Item Master in two modes—Authoring and Redlining.

- Authoring mode allows you to publish price information directly to the Item Master. You can publish prices in Authoring mode from the Analysis tab of a sourcing project.
- Redlining mode keeps track of all the previous price information. You redline price information when you want to make changes to the published information. You use PCOs to deal with changes to the published prices. A PCO contains multiple price objects, which in turn contain multiple price lines. You can redline the price line information of any price object in the PCO.

You can also add price lines to the price object or delete them in Redline mode. Adding price lines in Redline mode is similar to adding price line information to the price object.

Price managers submit the redlined price information to price administrators to approve (Price Review stage) and release. The price administrators review the redlined price information and release the PCO with or without the changes.

To redline price lines:

1. Open a PCO and select the Affected Prices tab.
2. Click Do Redlining in the price row that needs to be redlined. The price lines are displayed on the Price List Redline tab.
3. Select the row(s) of the price line that needs to be redlined.
4. Click Edit. The checked row becomes editable.
5. Edit information as required.
6. Click Save.

Note	You can view the original information as it was originally published from the redline window by checking the price lines and clicking the Undo Redlines button.

Deleting Price Lines in Redlining Mode

You can delete the price lines and send it for the price review. The approvers will accept or reject the deletion.

To delete the price line in Redlining mode:

1. Open a PCO and select Affected Prices tab.
2. Click Do Redlining in the price row that needs to be redlined. The price lines are displayed in the Price List Redline tab.
3. Click Delete.
4. Click OK in the confirmation message.