



Agile Product Lifecycle Management

Product Cost Management Supplier 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) (<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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Readme

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Introduction

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Overview

Traditional methods for managing and analyzing total product costs throughout the product lifecycle are complex, time consuming, and often ineffective. Agile Product Cost Management (PCM) supports, enhances, and simplifies these processes, allowing organizations to effectively manage and manipulate sourcing content, collaborate with suppliers to establish new sourcing content, and analyze the data to drive the best sourcing decision across each product's lifecycle.

The Supplier Interface of Agile PCM helps you manage your RFQ Responses. Depending on your assigned roles, you can submit responses to the sourcing manager, view attachments, participate in threaded discussions, view the history of your RFQ Responses, import or export RFQ Responses, discover previously submitted pricing information, and run reports.

What is Product Cost Management?

Agile Product Cost Management (PCM) is an Internet-based solution suite that includes Product Sourcing and Contract Management capabilities.

Product Sourcing manages the preparation and dissemination of Requests for Quotes to suppliers and allows analysis of supplier responses. It provides you, the supplier, with a secure, easy-to-use interface from which you can receive RFQs, enter your responses, and submit them to your customer.

Contract Management provides the visibility of Contract and Pricing attributes throughout the organization and provides workflow approval processes for the release of new contracts, or changes to previously released pricing. It also provides visibility to you, the supplier, and allows you to participate in workflow processes, as well as proactively initiate a change to contract pricing.

Introducing Agile Objects

Note For a complete description of Program Execution.1 concepts and tasks, see *Getting Started with Agile PLM*. From the menu bar, select Help | Manuals to display the Program Execution.1 documentation web page.

In the Agile system, you work with *objects*. Examples of objects are parts, documents, RFQs, RFQ Responses, and change orders.

The objects you can view and the actions you can perform are determined by the roles and privileges you are granted to access those objects. Privileges can vary from field to field. If you have questions about your roles and privileges, contact the Supplier Manager user in your organization or contact the Agile administrator.

When you open an object, it appears with a number of tabs. Different types of objects have different tabs. Each tab contains fields that provide information about that object. For example, a part's Title Block tab includes Number, Part Category, and Description fields, and a change's Cover Page tab includes Originator, Status, and Reason For Change fields.

Some tabs have fields and tables where you enter data; some fields and tables are filled in automatically. Some objects and commonly found tabs are mentioned in the discussions later in this chapter.

Sourcing Process

Supplier users do the following:

- Propose alternate parts
- Analyze historical quoting information
- Configure quote routing so that appropriate supplier users receive RFQ Responses
- Receive proactive reminders and alerts from the buyer organization to prevent missed opportunities
- Update your line card offerings
- Create your own supplier users
- Assign alternate users
- Costed BOMs, if applicable

Login Security and Passwords

Depending on how the Agile administrator has configured your password settings, you may have two separate passwords for login and approval, or you may have one password for both login and approval.

For system security, the Agile administrator may configure the Agile system so that you are not

allowed to log in after a specified number of password failures (entering the wrong password). The lockout applies to both your login password and your approval password.

Depending on system settings, one of the following occurs:

- The login lockout lasts until a specified time has passed (for example, one minute).
After the specified time has passed, a small Login dialog box appears, telling you that there have been too many login failures. Click OK and continue.
- The login lockout lasts until your Agile administrator unlocks your account by changing your password. If you are locked out, Web Client hangs for the time period specified by the Agile administrator (for example, one minute) each time you attempt to log in.

Discovery and Read Privileges

Together, the Discovery privilege, the Read privilege, and the Enforce Field Level Read privilege determine which Agile objects you can find and open, and which object fields you can view.

When you search for objects, you may see a message indicating that a number of rows are not displayed in the search results table due to insufficient privilege. This indicates that you do not have the appropriate privileges to find or discover those objects. You may see that some fields in the search results table contain the notation “No Privilege.” This indicates that you do not have the appropriate privileges to view the information in that field.

When you open an object, you may see the notation “No Privilege” in one or more fields. This indicates that you do not have the appropriate privileges to view the information in that field.

If you have questions about your assigned privileges, contact the supplier manager user at your supplier organization or contact the Agile administrator.

The Discovery privilege lets you discover the existence of an object in the Agile database. If you do not have Discovery privilege for an object, you cannot view the object, and you cannot find, or discover, the object in the Agile database. This includes viewing users in the address book; there may be some users that you cannot view due to lack of privileges.

Once you have the privilege to discover an object, your Read and Enforce Field Level Read privileges for that object determine whether you can open and view it, and which individual fields you can view. You may be able to read an object, but you may not have Read privilege for every field of that object. So it is possible for you to open an object and, at the same time, be unable to view specific fields of that object.

For more information about the Discovery and Read privileges, see the *Program Execution Administrator Guide*.

Viewing, and Working with, Attachments

On the Attachments tab of an object, you can attach files and URLs to the current object by referencing those files and URLs in a file folder object. On this tab, you can view, copy (Get), print, check out and check in attached files if you have the appropriate privileges. Individual attached files are stored in File Folder objects and can be attached to multiple objects.

Note	All attachment tasks (including check in, check out, and add) can be performed from the Attachments tab of the object you are working with, if you have the appropriate privileges for that object type (for example, RFQ Response objects).
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For detailed information about file folders and attachment files, see *Getting Started Guide*.

To view a file using Agile Viewer, click its File Name link. If the file is viewable in the Agile Viewer, it opens in the viewer. If the file is not viewable in the Agile Viewer, it opens in the native application (for example, Microsoft Excel) if it is installed on your computer. If the attachment is a URL, a browser window opens and displays the contents of the URL.

If you have the appropriate privileges, the Get, Print, Checkout, Checkin, and Cancel Checkout buttons are displayed in the attachment table rows.

The Add button above the table allows you to add attachments by several methods. Add > Files attaches one or more files and creates a file folder object containing those files. In the Add File dialog window, use Browse button to locate the files you want. When you are through, click OK in the dialog window. Add > URLs attaches URLs and creates a file folder object for each URL. In the Add URL dialog window, enter the URLs. Click Preview to test each URL. When you are through, click OK. Add > By Search allows you to search existing file folders for the files or URLs you want to attach. Follow the instructions in the Add Files By Search dialog window to search for and select the file folder you want, then select files or URLs in that file folder that you want.

Searching for Objects

When you want to find objects in the Agile system (for example, RFQ Responses or Manufacturer Parts), you perform a search. Agile provides several types of searches:

- Simple searches find objects of all types that match the text you specify.
- Advanced Object Searches find all the objects with fields that match the conditions of the search. For example, you could search for parts where the Description field contains "Computer."
- Parametric searches extend the Advanced Object search to include multiple conditions
- Where-used searches find the assemblies in which the BOM contains the items that match the search criteria.
- Relationship searches find objects related to the objects that meet the search criteria. For example, you can search for the problem reports that appear on the Relationships tab of changes that meet search criteria.


For complete information about searching for Agile objects, see *Getting Started with Agile PLM*.

Using the Filter Tool

The filter tool allows you to filter objects in an object tab table, for example, the table on Responses tab of an RFQ Response object.

Some object tabs include a Show Filter button. When you click this button, the filter tool is displayed. Use the filter tool to display only the table rows you are interested in.

To use the filter tool:

1. Click Show Filter button to display the tool.
2. From the Attribute drop-down list, select the table attribute on which you want to filter. For example, Commodity.
3. In the Match If drop-down list, select a filter operator, for example, Equal To or Not Equal To.
4. In the Value field, click the  button and select a value to match, for example, Resistors.
5. After you select the filter criteria, click Apply.

Only the rows selected by the filter criteria appear in the table.

Note	To see all rows in the table, select Show All in the Attribute drop-down list, then click Apply.
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Numeric Search and Entry Using Special Characters

When data is entered in a numeric field (either in search criteria or on Page Two or Page Three (custom tabs or sections defined by the Agile administrator), if the number is followed by a special character, the number is multiplied by the appropriate scaling factor and entered in the database.

For example, if you enter 25k in a numeric field, the Agile system stores 25000 in the database. Also, if you enter 25k in search criteria, the Agile system searches for 25000.

For a list of all the special characters and what they represent, see *Getting Started with Agile PLM*.

Managing Your User Profile

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Managing Your User Settings

You access Web Client settings by choosing Tools > My Settings from the main menu bar.

This section includes the following topics:

- Changing Your User Profile
- Changing Your Password
- Viewing Signoff Authority Transfers
- RFQ Response Edit Mode

The following options under My Settings are discussed in *Getting Started with Agile PLM*.

- Organize Bookmarks
- Organize Searches
- Organize Reports
- Personal Groups
- Deleted Personal Groups
- Personal Criteria

Note Supplier managers can see and modify additional information on the Administrator page. For details, see [Managing Supplier Details](#) (on page 11).

When you are working with Agile settings, a navigation path appears at the top of the right pane, indicating how you arrived at the current Web Client page (for example, Settings Home > User Profile). You can click a link in the path to return to the corresponding location.

Changing Your User Profile

Your user profile contains a variety of information about how to contact you, your date and time

preferences, and several Agile Web Client onscreen display preferences. You have an opportunity to enter information when you first log in to Agile Web Client.

To edit, or add information to, your user profile:

1. Open your user profile by clicking User Profile in Tools > My Settings.
2. Click the tab on which you want to make changes.
3. To make changes to the General Info and Preferences tabs, click Edit and use the lists, browse buttons, and text boxes to enter the requested information.
4. To make changes in the Escalations tab, select the row(s) you want to edit, and click the appropriate button: Edit or Delete. Or click Create for new Escalations.
5. To make changes in the Attachments tab, click Edit or Remove. Or click Add to add Files, URLs.

Changing Your Password

If you have a separate approval password, the process to change your approval password is similar using the Change Approval Password option.

To change your login password:

1. Click Change Password in Tools > My Settings.
The *Change Login Password* page appears.
2. Type your old login password in the Login Password field.
3. Type your new login password in the New Login Password and Confirm Login Password fields. (Passwords are case-sensitive.)
4. Click OK.

If you have not followed the rules defined in your Agile system for selecting passwords, you are prompted to correct your password.

Viewing Sign-off Authority Transfers

An Agile user with the appropriate privileges can have sign-off authority transferred from you to another user, or from another user to you. This is useful when, for example, you are out of the office and unavailable to sign-off on changes, such as price change orders (PCOs).

To view transfers that have been set up for you, click Transfer Authority in Tools > My Settings.

If you are a price collaborator (you have the ability to approve PCOs), you may have the ability to create sign-off authority transfers for yourself. For information about how to create, modify, and delete sign-off authority transfers, see *Getting Started with Agile PLM*, in the topic about routing objects with workflows.

RFQ Response Edit Mode

You can enter RFQ line item responses in three ways. You select which response entry mode you want to use on the Preferences tab of your User Profile. You can change your selection at any time. If

you like, experiment with each response entry mode to discover which one you prefer.

For more details about the various methods for entering response information, see [Entering and Modifying RFQ Response Information](#) (on page 30).

▫ **Basic**

If you select Basic, when you open an RFQ, you see only the Cover Page. You do not see the other tabs. However, you can still respond to the RFQ.

The Basic entry mode displays a single page for each line item. You fill out the fields for one line item, then click a button to save your entries and go to the next line item in the RFQ. See [Basic Edit](#) (on page 33).

▫ **Advanced Wizard Edit**

The Advanced Wizard Edit mode lets you display the Responses tab of the RFQ Response object, where the line items are displayed in a table. Select the line items you want, then, from the tab menus, choose the action you want to perform. When you choose Responses > Enter/Modify, the selected line items are displayed in a page at a time, similar to the Basic entry mode. However, Advanced Wizard Edit mode provides additional features and shortcuts. See [Advanced Wizard Edit](#) (on page 33).

▫ **Advanced Table Edit**

The Advance Table Edit mode lets you display the Responses tab of the RFQ Response object, where the line items are displayed in a table. Select the line items you want, then, from the tab menus, choose the action you want to perform. When you choose Responses > Enter/Modify, you can enter and modify information in the table cells. Of the three entry modes, the Advanced Table Edit mode is the most similar to a spreadsheet program (for example, Microsoft Excel). See [Advanced Table Edit](#) (on page 32).

To switch between entry modes:

1. Choose User Profile in Tools My Settings.
2. Go to Preferences tab, and click Edit.
3. From the Response Edit Mode drop-down list under Display Preferences, select the method you want to use, and click Save.

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Managing Your Supplier Profile

The Supplier Interface of Agile PCM helps you manage your RFQ Responses. The sourcing manager creates the RFQ and sends it to the suppliers. As a supplier user, you can submit responses to the sourcing manager, view attachments, view the history of your RFQ Responses and (with the appropriate privileges) import or export responses, run reports, and collaborate in price management. See [Responding to Request for Quotes](#) (on page 21), and [Collaborating on Pricing and Contract Information](#) (on page 47).

About the Supplier Manager

The supplier manager is the user at a supplier organization who maintains his supplier organization's profile, line card offering, users, and RFQ routing setup.


If you have the (Restricted) Supplier Manager role, you can perform administrative tasks. You can view or modify the profile details of your supplier organization. The supplier profile records important manufacturer and commodity information for your company.

Viewing Your Supplier Profile

Note For more information about supplier profiles, see the chapter about working with suppliers and supplier groups in *Getting Started with Agile PLM*. From the menu bar, select Help > Manuals to go to the [Agile PLM 9.2.2 Documentation Web site](http://docs.agile.com) (<http://docs.agile.com>).

The easiest way to view your supplier profile is to search for it, and bookmark it. Whenever you need to view or modify your supplier profile, click its bookmark in the navigation pane on the left side of the Agile Web Client window.

To bookmark your supplier profile:

1. Select Supplier from the drop-down list, and enter your company name in its search field. Or simply enter * for a wildcard search.
2. Click Run Simple Search button .
3. In the search results (if more than one supplier name appears), click the link for your supplier organization in the Name/Number column.

The tabbed object for your supplier profile is displayed.

4. From the Actions drop-down list, select Bookmark.

In Shortcuts in the navigation pane on the left, a bookmark for your supplier organization appears under My Bookmarks. You can use this bookmark at any time to open your supplier profile.

Just as your user profile object displays information about you and your user preferences, the supplier profile object displays information about your supplier organization and the settings you choose to use. The appropriate buyer user (Organization Manager) creates suppliers. You can view this information and edit some of the information on the tabs of your Supplier profile.

The following table shows the tabs and the default fields for suppliers.

Supplier tab name	Default fields include	Tab information includes
General Info	Name, DUNs, Description, Web Supplier, Address, City, Country/Area, Region/Province/State, Postal/Zip Code, Phone, Fax, URL, Corporate Currency, Create User	General information about the supplier organization.
Contact Users	User Name, Created By	Contains all supplier users associated or created.
RFx Routing	Continent, Ship-To	RFQ routing information.
Manufacturers	Manufacturer Name, Ship-To, Rating	Manufacturer line information.
Commodities	Manufacturer Name, Ship-To, Rating	Commodity information.
PSRs	PSR Number and other related fields	PSR information Note This info is visible only if you have the requisite privileges.
Relationships	Name, Description, Current Status, Rule and Type	View Completed, Pending, and Rules not Specified, or All Relationships
Attachments	File Description, File Name, Checkout User, Checkout Date, Checkout Folder, Modified Date, File Version, File Size, File Type, Last View Date	Add files, URLs; Get Shortcuts to Files; View Files, URLs.
History	Action, User, Local Client Time, Details and Comments	Track changes and events.

The General Info tab has fields that contain the general information about the supplier profile object. Some fields are filled in automatically; you complete the rest.

To edit supplier information, click the Edit button. You cannot edit the contents of some fields.

Fields on the General Info Tab

The General Info tab contains the fields listed in the following table. The Agile administrator can add custom fields to the General Info tab.

Field	Description	Editable?
Name	Name of the supplier.	No
Supplier Type	Indicates if the supplier is of the following types: <ul style="list-style-type: none"> Component Manufacturer Contract Manufacturer Broker Distributor Manufacturer Representative 	No. Note that the Agile administrator can create or rename supplier types as needed. The supplier type assigned to your supplier organization may not appear on this list. Contact the Agile administrator or the Agile Organization Manager if you have questions about your supplier type.
Lifecycle Phase	Indicates if this supplier is active or not.	No
Number	Supplier number assigned to the supplier when it was created.	No
DUNS	The industry standard Data Universal Numbering System (DUNS) number.	Yes. If your supplier organization uses a DUNS number, enter that number here.
Display Name		No
Description	Text that describes the supplier. The maximum length is set by the Agile administrator.	Yes.
Web Supplier	Indicates if this supplier logs in to the Web Client or receives offline communication (Yes / No).	Yes. To use the Agile Web Client to complete and submit RFQ Responses, you must set this field to Yes.
Corporate Currency	The default currency for this corporation.	Yes. Select a currency from the drop-down list.
Address	Address.	Yes. Enter the correct contact information for your supplier organization.
Geography	Your Country / Continent	No.
City	City.	Yes
Postal/Zip Code	Postal or Zip code.	Yes

Field	Description	Editable?
Phone	Phone number.	Yes
Fax	Fax number.	Yes
URL	URL for supplier Web site.	Yes
Maximum Number of Contact Users	The maximum number of supplier users that can be created for this supplier.	No
Maximum Number of Licensed Contact Users	The maximum number of supplier users that can be assigned a concurrent user license.	No
Max Number of Named Contact Users	The maximum number of supplier users that can be assigned a power user license.	No
Default RFQ Recipient		
Default Declaration Recipient		

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.

Managing Contact Users

If you have the (Restricted) Supplier Manager role, you can perform administrative tasks. You can view or modify the profile details of your supplier organization. The supplier profile records important manufacturer and commodity information for your company.


The Contact Users tab of your supplier organization profile lists all the users associated with or created for your supplier organization. Open your supplier profile object and click the Contact Users tab. For details, see [Viewing Your Supplier Profile](#) (on page 11).

You can click Show Filter button to specify criteria for viewing only certain information on this tab. For details, see [Using the Filter Tool](#) (on page 4).

Creating a Contact User

Users with the (Restricted) Supplier Manager role can create new contact users.

To create a contact user:

1. In the Contact Users tab, click Create Users. The *Create Users* window appears.
2. Fill up Username, Login Password and other fields. If you wish to use a different password for Approvals, uncheck User Login Password for Approval.
3. If you checked the "Continue Creation in Wizard", click <continue> to proceed to *Enter Information for "General Info" tab* page.
4. Enter/modify details of the user, such as Mobile Phone, City, etc.
5. Click  next to the Roles field in Profile section to add roles. Fill up other data, such as, Authorized Ship To, Sites, etc.
6. Click Next to proceed to *Add Contact Users* page for modifying System, Format and Display Preferences.
7. Click Finish

Important Profile Fields

- Roles – the user's role assignments, which determine a user's access to Agile objects.
- Lists – the routable object manager lists on which the user's name appears, for example, the Change Analyst list (depending on your privileges, this field may not be editable).
- Searches – determines which predefined search folders are available to the user, for example, the Change Analyst searches (depending on your privileges, this field may not be editable).
- User Login Password for Approval – if set to Yes, use one password (login password) for both login and routable object (PCO) approval.
- Allow Escalation Designation Approval – this setting determines whether the user's designated escalation persons can approve a routable object (PCO) for the user only After Escalation or Always.
- Sites, Default Site – Sites is the list of manufacturing sites the where the user is involved. The Default Site is the user's main base of work.

The General Info tab also includes fields for contact information such as mailing address and phone numbers.

For detailed information about all the User object fields, see the *Administrator Guide*.

Modifying a Contact User's Information

You can modify the contact user information, including changing the password and specifying whether the user is active or inactive.

To modify contact user information:

1. Search your Supplier. For details, see [Viewing Your Supplier Profile](#) (on page 11).

2. Click on your Supplier Name/Number. Go to Contact Users tab.
3. Click the User ID link. The User page appears.
4. To modify General Info tab data, click Edit. Make changes as required.
5. To enable or disable the user, select Active or Inactive in the Status drop-down list. A inactive user cannot log in to Agile and, therefore, cannot respond to RFQs.
6. To save the changes that you made to the User page while it was in edit mode, click Save. To undo the changes that you made to the User page while it was in edit mode, click Cancel.

Changing a Contact User's Password

You might need to change or reset a user's password when he has forgotten it.

To reset a user password:

1. Click the User ID link. The User page appears.
2. In the General Info tab, Click the Reset Password button. A Password window appears.
3. Type the new password in the Password and Confirm Password fields, and Click OK.

Deleting a Contact User

You may want to delete a contact user if that person no longer works at your organization.

To delete contact user information:

1. Click the user ID link. The User page appears.
2. In the Actions menu, choose Delete.
3. When the confirmation prompt appears, Click OK.

Managing RFQ Routing

The RFx Routing tab defines which contact users respond to RFQs coming from given Ship To locations. You can create RFQ routing rules from this tab.

If you do not specify RFQ routing rules, all RFQs will be sent to the default recipient. The default recipient must then forward each RFQ to the appropriate contact user.

Note You must have the (Restricted) Supplier Manager role to set up RFQ routing.

To create an RFQ routing rule:

1. On the RFx Routing tab, click Create. The *Add RFx Routing Wizard* appears.
2. Select Continent, Country/Area, and State/Province/Region from the corresponding drop-down lists.
3. Select the Owner who should receive RFQs based on this geography, and click Finish.

To edit an RFQ routing rule:

1. On the RFx Routing tab, select a row of RFx Routing rule that you want to modify. Click Edit

button.

2. Make the required changes. You can edit only the geographical information. 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, click Cancel.

To delete an RFQ routing rule:

1. Select a row of the RFX Routing rule that you want to delete.
2. Click the Remove button.

A message appears for you to confirm whether or not you want to delete the routing rule.

3. Click OK to delete.

Changing the Default Recipient

After a supplier is created, the first contact user added becomes the default RFQ recipient. The default recipient receives any RFQs that could not be routed based on a routing rule. You can change the default recipient at any time.

To change the default recipient:

1. In the RFX Routing tab, Click  button next to the Default Recipient field.

The *Select User* window appears.

2. Type a name or select one from the drop-down list, and Click OK.

The changed default recipient is displayed in the Default Recipient field.

Defining Manufacturer Offerings

Suppliers have two types of line cards—manufacturer and commodity. Manufacturer offerings define which product lines are carried by a manufacturer. Commodity offerings define which product lines are associated with a commodity.

The manufacturer line card is a detailed list that maps each manufacturer whose goods you carry to a specific geographic location where those goods are available. This is a way to indicate the manufacturers whose goods you are franchised to offer in certain geographic regions.

For example, a supplier called ACME Corp. might sell Motorola and Kemet products.

The manufacturer line card is one of the settings that determine which RFQs you receive from buyers.

Note	When you update the geographical information or Ship To locations for a manufacturer or commodity for a line card, the organization manager receives a notification in his inbox so that he can approve the line card offering.
------	---

Creating a New Manufacturer Offering



You can specify general information about the manufacturer offerings from the Manufacturers tab.

Each manufacturer line card definition is a unique combination of manufacturer, supplier, and Ship To locations. You can have multiple lines for each manufacturer, each line for a manufacturer associated with a different Ship To location. If there are changes to the geographic locations where the goods are offered, then you can edit the manufacturer line cards.

Note When you create an offering, make sure the geographical data you specify is not narrower than an existing offering for the same manufacturer or commodity.

For example, if the Region/Province/State field for an existing offering is set to All, you can't create a new offering for the same manufacturer or commodity with the Region/Province/State field set to California because the existing offering covers a broader region.

To create a new manufacturer offering:

3. In the Manufacturers tab, click the Create button. The *Create Manufacturer Offerings Wizard* appears.
4. Click  button to select the Manufacturer Name. Searches are provided to lead you through the process of selecting a manufacturer.
5. Select the Geography or Ship To radio button to define the offering by geographical location or ship-to location.
6. If you selected Geography, then specify the continent, country/area, state/province/region. If you selected Ship To, specify one or more locations by clicking  button.
7. Click Finish to complete the operation. The new manufacturer line card definition appears in the list.

Filtering the Manufacturers Tab

You can filter the Manufacturers tab to display only certain information. Click the Show Filters button to specify what information you want to see. For more information, see [Using the Filter Tool](#) (on page 4).

Deleting a Manufacturer Offering

You can delete a manufacturer offering.

To delete an offering:

1. In the Manufacturers tab, select the row(s) of manufacturer(s) that you wish to delete. Click Remove button.
2. A message appears for you to confirm whether or not you want to delete the offering. Click OK to delete the offering.

Defining Commodity Offerings


Your commodity offerings define the categories of product you sell. For example, a supplier called ACME Corp. might sell commodities such as fuses, integrated circuits, and resistors. The commodity line card is a detailed list that maps each commodity you carry to a specific geographic

location where those goods are available.

Creating a New Commodity Offering

You can specify general information about the commodity offerings from the Commodities tab. Each commodity line card definition is a unique combination of manufacturer and Ship To locations. You can have multiple lines for each commodity, each line of a commodity associated with different Ship To locations. If there are changes to the geographic locations where the goods are offered, the supplier manager can edit the commodity line cards for your supplier organization.

To create a new commodity offering:

1. Click Create button. The *Create Commodity Offerings Wizard* appears.
2. Click  button to select the Commodities Codes. Searches are provided to lead you through the process of selecting the commodities. Click Next.
3. Select the Geography or Ship To button to define the offering by geographical location or ship-to location.
4. If you selected Geography, then specify the continent, country/area, state/province/region. If you selected Ship To, specify one or more locations.
5. Click Finish to complete the operation. The new commodity line card definition appears in the list.

Deleting a Commodity Offering

You can delete a commodity offering.

To delete a commodity offering:

1. Select the commodity offering that you want to delete. Click the Remove button.
2. A message appears for you to confirm whether or not you want to delete the offering. Click OK to delete the offering.

Filtering the Commodities Tab

You can filter the Commodity tab to display only certain information. Click the Show Filters button to specify what information you want to see. For more information, see [Using the Filter Tool](#) (on page 4).

Responding to Request for Quotes

This chapter includes the following:

▪ Working with RFQ Responses.....	21
▪ Completing RFQ Responses	26
▪ Using the Responses Tab to Respond to RFQs.....	27
▪ Creating Online Responses.....	30
▪ Creating Offline Responses.....	36
▪ Viewing BOM Attachments	39
▪ Reviewing RFQ Response Changes	42
▪ Using Discussions	43

Working with RFQ Responses

Buyers send requests for quotes (RFQs) to their suppliers to get price quotes. The sourcing manager assigns you the (Restricted) RFQ Responder role so you can respond with the requested price information and submit your responses.

As an RFQ responder, you can:

- Determine the bid or no-bid decision for each part, and complete the requested response information for the parts you have chosen to bid.
- Propose alternate parts from a manufacturer not in Agile database instead of the part specified in the RFQ.
- Provide material and non-material price information.

When a buyer creates an RFQ, one or more RFQ Response objects are created for your supplier organization. If you are the owner of the RFQ Response, a notification appears in your Notification Inbox.

You can respond to RFQs within PCM, or you can export the RFQ Response lines to a text file and use an external text editor to respond, such as Microsoft Excel. You view RFQ response information on a set of tabs on the RFQ Response object page.

Note For information about entering and submitting RFQ response information, see [Completing RFQ Responses](#) (on page 26).

Before you can proceed with an RFQ, you are required to Accept the Terms and Conditions, if set mandatory by the buyer. Should you chose to Decline, you will not be able to view the RFQ and you will be returned to your Notifications Inbox. These Terms and Conditions prescribe buyer's expectations and RFQ specific stipulations.

If you forward an RFQ to another user in your organization, s/he will also 'have to' accept the Terms and Conditions to proceed further with it.

The following table describes each RFQ Response object tab and the actions you can perform from each one.

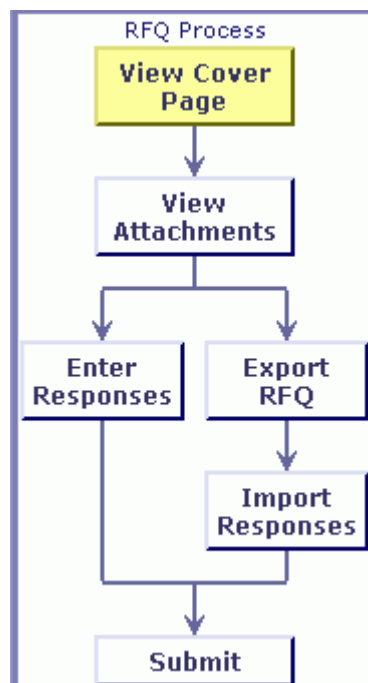
Note When you view the RFQ Response, the Actions menu appears above the tabs. This menu applies actions to the entire RFQ Response object. Use the Actions menu commands to send or forward the RFQ Response or to create a bookmark.

Note

Tab	Description	Actions
Cover Page	Displays general details about the RFQ Response.	View RFQ Response details.
Responses	Displays response line details, and lets you filter the response information to view specific details, and perform various response entry tasks.	Filter how to view response details. Propose alternate manufacturer parts. Enter or modify response details. Set expiration dates. Export or import response line details. Submit selected response lines.
Changes	Displays changes made to the RFQ Response by the sourcing manager.	View change details by item view or response view. View item change summary by items that were added, deleted, or changed. Select a date that determines the response and change summaries.
Discussion	Displays the discussion objects related to the RFQ Response.	View the list of discussions in the table to reply, delete, and add discussions.
Attachments	Displays any file attachments for the RFQ Response.	View file attachment details. Edit, remove, and add attachments.
History	Displays a list of actions performed during the life of the RFQ Response.	View user, date, time, and description for each action.

About the RFQ Response Process Flow

In PCM, process flow diagrams appear in the navigation pane when you are working with RFQ Responses. The process flow diagram displays the actions you can perform.



- **View Cover Page** — Takes you to the RFQ Cover Page where you will find general information about the RFQ.
- **View Attachments** — Opens the RFQ Response Attachments tab so you can view attachments.
- **Enter Responses** — Selects all items in the RFQ and lets you fill in cost information using your preferred mode. You can select a preferred entry mode in Settings > User Profile > Preferences.
- **Export RFQ** — Selects all items in the RFQ and lets you export the RFQ so that you can work offline on your response.
- **Import Responses** — Opens the import wizard so that you can import the work you have completed offline.
- **Submit** — Saves your work if you have not already done so, then sends all valid responses to the sourcing project manager.

Click an action in the process flow diagram to initiate that action. If the action requires a selection, you will be redirected to the appropriate page to make the selection.

Note In some instances you cannot go to a step in the process until you have completed the previous step.

About RFQ Response Lifecycle Phase

The lifecycle phases of RFQ Response are listed in the table below.

Lifecycle Phase	Description
New	New indicates that you have not yet opened and reviewed the RFQ Response. This is the lifecycle phase of an RFQ Response when it first appears in your inbox.
Open	Open indicates that you can modify and work with the RFQ Response. When you open a new RFQ Response, the lifecycle phase changes to Open. You can modify an open RFQ Response, including entering response information on the Responses tab and submitting responses.
Locked	Locked indicates that the sourcing manager has locked the RFQ associated with this RFQ Response. Supplier cannot do any modifications to the Responses if the Buyer has locked an RFQ; all actions on the Supplier side of the RFQ will be deactivated.
Closed	Closed indicates that the sourcing manager has closed the RFQ associated with this RFQ Response. You cannot make any modifications to an RFQ Response in the closed lifecycle phase.

RFQ Response Actions

The RFQ Response Actions menu allows you to:

- Bookmark the RFQ Response for fast, convenient access.
- Send the RFQ Response to other users.
- Forward your RFQ Response to another user within your company.
- Subscribe to an RFQ Response so you can be notified when the RFQ Response is modified.
- Share the RFQ Response with another user by granting one or more of your roles to another Agile PLM user for the current RFQ Response object.

See *Getting Started with Agile PLM* for more information about Actions menu choices.

Bookmarking RFQ Responses

Bookmarks are links you create for quick access to open the RFQ Responses you are working on. To create a bookmark for an RFQ Response, open the RFQ Response and choose Bookmark from the Actions menu. The RFQ Response number is saved in the Bookmarks list in the navigation pane on the left side of the Agile Web Client page.

You can delete bookmarks you no longer need.

To delete a bookmark:

1. Click Organize Bookmarks in Tools > My Settings.
2. If the bookmark you want to delete is in a bookmark subfolder, navigate to that folder.
3. Check the bookmarks you want to delete.
4. Click Remove.

Sending RFQ Responses

You can send any Agile PLM object to another user listed in the Agile PLM address book, if you have the appropriate send privilege for the object type. The object is sent as an email, which contains a link to the mailed object, and the recipient can click the link to view the object in Agile PLM.

Note When you send an RFQ Response, the ownership of the RFQ Response is not changed. If you want to transfer ownership of an RFQ Response to another user in your supplier organization, use the Forward action, described in [Forwarding RFQ Responses](#) (on page 25).

To send an RFQ Response:

1. Open an RFQ Response.
2. Choose Actions > Send. The *Send* page appears.
3. Click Send To button to find and select the users or groups, whom you want to send the RFQ Response.
4. Enter any comments you wish.
Your comments are included in the body of the email message.
5. Click Send.

Forwarding RFQ Responses

You can forward an RFQ Response to another user in your supplier company. This is helpful when several people are involved in answering and returning a response to the buyer.

Once you forward a response, you cannot retrieve it. However, the person you forward the RFQ Response to can forward it back to you. When an RFQ Response is forwarded, the initial supplier remains the primary contact. If the buyer modifies the RFQ Response in any way, it automatically reverts to the initial supplier contact and disappears from the second contact user's workflow routings. You can specify a comment to accompany the notification when forwarding a response.

Note It is recommended that when using RFQ Forward, the additional Contact Users' Preferred Inbox View be set to Notifications. This will allow the user to view any instructions that may be included in the body of each notification.

To forward an RFQ Response:

1. Open an RFQ
2. Choose Actions > Forward. The *Forward Response* page appears.
3. Select the user to whom you want to forward the RFQ Response in the Notify drop-down list.
4. Enter any comments you wish.
5. Click OK.

Important If the RFQ has Terms and Conditions associated with it, any supplier user who opens up the forwarded RFQ is required to accept the terms in order to open the RFQ. A record of forwarding is maintained in the history.

Subscribing to an RFQ Response

Subscribing to an Agile PLM object sets you up to receive notification of events that happen to that object.

For example, you might subscribe to an RFQ Response to be notified when the response is forwarded to another user.

To subscribe to an RFQ Response:

1. Display the RFQ Response object.
2. Choose Actions > Subscribe.
3. Indicate when you want to be notified by selecting the appropriate Subscriptions check boxes.
4. Click Save.

Sharing an RFQ Response

Sharing lets you grant one or more of your roles to another Agile PLM user or user group for specific objects. The capability to share a given role includes your assigned roles (as displayed in your user profile) and roles that have been shared with you by virtue of belonging to a user group to which the role has been shared.

To share an RFQ Response:

1. Display an RFQ Response object.
2. Choose Actions > Sharing. The *Access Control List | Share with Users* page appears.
3. Click Add. The *Add to Access Control List Wizard | Identify Users* window appears.
4. Find and select the users or groups you want.
5. Click Next. The *Apply Roles* page appears.
6. Select appropriate role(s) for your chosen users or groups.
7. Click Finish. The *Access Control List | Share with Users* page appears again displaying the selected users and their selected roles.
8. Click Return. This returns you to the RFQ Response.

To remove a user from the share list:

1. Choose Actions > Sharing to display the *Access Control List | Share with Users* page.
2. Select the user you want to remove.
3. Click Remove.
4. Click Return to go back to the RFQ Response.

Completing RFQ Responses

The sourcing manager in a buyer organization sends a request for quotes (RFQ) to your company. The RFQ responder receives the request and provides a response to the requester. The responder

becomes the owner of an RFQ Response object. You can access an RFQ Response in two ways:

- From the Notifications tab in your Inbox — You receive notifications about subscriptions or completed processes and requests to accept ownership of an action item or activity. Click the new notification message. Click the RFQ number on the Notifications & Requests page to open the RFQ Response object.
- From RFQ Response searches — Search for RFQ Responses. On the search results page, click the RFQ number you want.

The Cover Page tab of an RFQ Response displays general information about that RFQ Response. Review the Cover Page for information such as the response due date, instructions, contact information, who owns the RFQ Response in your organization, percent of progress, and lifecycle phase.

Using the Responses Tab to Respond to RFQs

Note Whether or not you can view the Responses tab of an RFQ Response object depends on the Response Edit Mode selected on the Preferences tab of your user profile. If the Response Edit Mode is set to Basic, you will not see any tabs when you open the RFQ Response. For information about changing your Response Edit Mode, see [RFQ Response Edit Mode](#) (on page 8).

The Responses tab is where you do most of your work. You can check the RFQ item responses, negotiate prices and terms, and submit bids to the buyer.

In order to see the supplier's view of an RFQ, you must login to Agile PLM as the user who is the supplier's contact person with RFQ response permissions.

Responses Tab

When you click the Responses tab, you can view the responses to the RFQ in the response table. The columns displayed on the Responses tab can vary in different RFQs, depending on how the sourcing manager decides to create each RFQ. The fields selected by the sourcing manager will show up as columns in the table on the response tab.

Responses Table

The Responses tab includes at least the following fields:

AML Status	The status of the manufacturer part for the item, for example, whether the manufacturer part is the preferred part or the alternate part.
Number	The part number for the item listed. Manufacturer part numbers (MPNs) are indented under associated internal part numbers (IPNs). If the buyer has opted to not share IPNs, you are notified, and you cannot view the BOM. If an IPN leaf level or assembly does not have an associated AML, or if the buyer sets the quote level at an assembly level without an AML, the IPN appears.
Rev	The revision of the item.
Description	The description of the item.
Manufacturer	The name of the manufacturer for the MPN.

Commodity	The commodity name, for example, ICs, Resistors, or Diodes.
Bid Decision	The decision to bid or not bid, and the reason for not bidding.
UOM	Displays the quantity unit of measure.

To view an object listed on the Responses tab, click its number.

Responses Drop-down Lists

The three drop-down lists available from the RFQ Response Responses tab are:

- Responses — You can Enter/modify, Copy, Paste, Enter Expiration Date, Export, Import or Submit an RFQ Response.
- Alternates — Propose alternate parts, delete alternate parts or add attachments.
- Look Up— Find Historical Response, if any, for any item(s) in the table.

Note All three are available only for select response lines.

Responses Buttons

These buttons are optional and configurable by the “data to share with suppliers” section when the RFQ is created. Right next to the Responses drop down lists, there are two optional buttons:




Costed BOM— The limited view of BOM items and prices; only the part of the BOM that is actually quoted to this supplier. It will not display parts in the hierarchy that have not been quoted.









Content BOM— The view of BOM and each item’s children parts. If an assembly is quoted as a custom/component, the BOM tree underneath the assembly will not appear in the costed BOM view, but this will be visible in the BOM Content view.

Response Line Lifecycle Status

In addition to the RFQ Response object lifecycle phase, each Response line has its own unique lifecycle status. This allows each response line to be managed and tracked separately.

The following table lists symbols related to RFQ response lines. These symbols are displayed for each line on the Responses tab.

Symbol	Represents	Description
	Pending	This icon indicates that the response information for the item has not yet been submitted. No submissions have been made for the item.
	Ready	This icon indicates that all requested response information has been entered for the item and it is ready to be submitted.
	Invalid	This icon indicates that some requested response information has not been entered for the item (or has been entered incorrectly); more information is needed. Click the icon to enter the needed information.

Symbol	Represents	Description
	Submitted	This icon indicates that the response for this item has been submitted.
	Error	This icon indicates that there is an error in the response line. Click the icon to see more information about the error.
	Locked	This icon indicates that you cannot make any changes to the response line; the response line is locked.
	Requote	This icon appears for the items that are sent to you for requote.
	Details	You can click this icon to view the response price details for the item.
	Supplier Proposed	This icon indicates that this is an alternate manufacturer part that you proposed.
	Quantity Changed or New Line Added	The buyer has changed quantities or added a new line to the response since it was submitted.
	View Response Changes	You can click this icon to view the history of the changes that have been made to the response for this item.

RFQ Price Scenarios

When you first display the Responses tab, the information appears according to the default price scenario. You can select another type of price scenario from the Price Scenarios drop-down list.

- All Price Scenarios — View all price scenarios associated with the response.
- Default Price Scenario — View the default price scenario associated with the response. The default is defined as the lowest quantity break of the effectivity period that falls within today's date, or the earliest effectivity period.
- Selected Price Scenarios — Select from a list of price scenarios.

To view information for a selected price scenario:

1. Open an RFQ Response, and go to Responses tab.
2. In the Price Scenarios drop-down list, select Selected Price Scenario. In the window that appears, select the price scenarios you want to show from the Available Values list. Click the right arrow to add them to the Selected Values list.
3. Click OK.

Each price scenario represents either one quantity break or one quantity per price period. The following table shows examples of quantity breaks and target prices for one period for several different items.

Item number	10/01/04 - 12/31/04 QuantityBreak1 - Quantity	10/01/04 - 12/31/04 QuantityBreak1 - Target Price
10-007	1	0.04

Item number	10/01/04 - 12/31/04 QuantityBreak1 - Quantity	10/01/04 - 12/31/04 QuantityBreak1 - Target Price
10-008	10	12.80
10-009	1	0.04
10-010	10	16.60
10-011	1	0.04
10-012	1	0.09
10-013	5	2.95
10-014	100	122.00

Note To set a price value to 0, you must explicitly enter 0.

The Agile PLM system supports different price scenarios, so RFQ response fields vary based on the price periods and quantity breaks specified for a particular RFQ. Prices can be based on multiple quantity breaks (up to 6) or on multiple price periods, with one or more quantities per price period.

Entering and Modifying RFQ Response Information

There are two basic ways to enter your response information into PCM:

- **Online** — Enter the information online in the Agile Web Client. For details, see [Creating Online Responses](#) (on page 30).
- **Offline** — Export the selected response lines of the Responses tab to a file, edit the exported file in a spreadsheet program, such as Microsoft Excel, and then import the edited file, with your data, into Agile PLM. For details, see [Creating Offline Responses](#) (on page 36).

Creating Online Responses

In Agile PLM, the process flow appears in the navigation pane when you work with an RFQ. The process flow diagram displays each step in the response process, and you can click the diagram to move to the corresponding page or step. For more information on process flow, see [About the RFQ Response Process Flow](#) (on page 23)

When you receive an RFQ notification email and click the URL link to access the Product Cost Management system, you are taken automatically to the Cover Page of that new RFQ. Once there, you can click any step in the process flow diagram to move to that corresponding page or step. The step you select is highlighted in the diagram, so that you can always tell where you are in the process.

Online Edit Methods

You can enter response information online in three ways. You specify the method you want to use in your user profile. For information about setting the Response Edit Mode preference, see [RFQ](#)

[Response Edit Mode](#) (on page 8).

- Advanced Table Edit
- Advanced Wizard Edit
- Basic Edit

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.

Response Entry Form

RFQ
RFQ00261

Item 1 of 2 BL1458-01 Go To... < > Cancel Finish

For each response line, fill out the form below. Click the View link at the top right to see the list of responses in a table view. From the table view, you can access item-level attachments, comments, and costed BOM views. Click the Go To... button to jump directly to another response line.

☐ Apply to all the selected response lines

Number: BL1458-01
Description: SPRING STYLUS - SLV
Rev:
Manufacturer: BELKIN
Commodity:
UOM:
Bid Decision: Bid
Currency: USD (United States Dollar)
Inventory Available: 200
Valid Until: 07/26/2007 12:00:00 AM BST
Attachment: No

Cost Category	QuantityBreak1
Quantity:	1
Target Cost:	
Recurring Costs	3,000
Total Material Price	3,000
Material Price:	3,000
Total Non-Material Price	

Item 1 of 2 BL1458-01 < > Cancel Finish

In this form, you will notice three Checkboxes

- Apply to all the selected response lines - When you check this, the data (Inventory Available, 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.

Advanced Table Edit

You can enter bids for multiple line items in a single view. You can select a single line item and copy your entries, then paste them to another line item. You can enter responses directly in the fields on the Responses tab.

To enter response information using the Advanced Table Edit method:

Note	Make sure your Response Edit Mode preference is set to Advanced Table Edit. For details, see RFQ Response Edit Mode (on page 8).
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1. Open the RFQ Response that you want to work with, and go to Responses tab.
2. Select the row(s) that you want to work with, and choose Responses > Enter / Modify. You can also Click Enter Responses box in the Response Process displayed in left navigation pane. The selected row(s) appear in table form.
3. Select a different bid decision from the Bid Decision drop-down list, if appropriate.
4. For each quantity break, provide the material price and non-material price (if applicable).




Note	Edit function for Material and Non-material prices depends on the Quote As method set by the buyer -
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Assembly - You can edit only the Non-material price.

Component - You can edit only the Material price.

Custom - You can edit both Material and Non-material prices.

5. Enter or change the quantity in the Inventory Available field.
6. Change the expiration date in the Valid Until field, if appropriate.
7. When you are finished, click Save, or click <cancel> to return to the previous page without saving your entries.

An symbol appears next to any line item that has not been correctly completed. All valid fields are saved to the database, but you cannot submit a response to the sourcing manager until invalid required fields are completed. To complete an invalid entry, click the  symbol. That entire row switches to editable mode, with the invalid fields marked by  symbol and highlighted. Click on  symbol to know the reason.

8. Once you save a valid response, the Ready symbol  appears in the Response Readiness Status field.



Note You can copy response data values from one cell to another. Selecting the value to be copied and press Ctrl + C. Place the cursor on the destination cell, and press Ctrl + V to paste the copied value. For more information on working with responses, see [Response Entry Form](#) (on page 31).

Advanced Wizard Edit

You can enter your bid for a single line item at a time. You can also enter identical bids for all line items at one time.

To enter response information using the Advanced Wizard Edit method:

Note Make sure your Response Edit Mode preference is set to Advanced Wizard Edit. For details, see [RFQ Response Edit Mode](#) (on page 8).

1. Open the RFQ Response that you want to work with, and go to Responses tab.
2. Select the response line(s) that you want to work with, and choose Responses > Enter / Modify. You can also Click Enter Responses box in the Response Process displayed in the left navigation pane. The *Response Entry Form* page appears. See [Response Entry Form](#) (on page 31) for more details.
3. Complete the fields the same way as you do using the Basic method. For details, see [Basic Edit](#) (on page 33).
4. You can click Propose Alternate if you want to propose an alternate part. For information, see [Proposing an Alternate Manufacturer Part](#) (on page 34).
5. The Fill Right button  can save you time. If you want the same value to appear in every column to the right of where you are entering a value, check the box beside the current value (for example, Material Price), and click the Fill Right button at the top of that column. The value is copied into the columns to the right.
6. Click  to save your entries and go on to the next item in the RFQ Response (if you selected more than one line item on which to bid).

Note To apply your entries to all the selected response lines, check the box labeled Apply to all the selected response lines and click Finish.

7. When you have finished entering or editing the information, click Finish.

The Responses tab appears. The information you entered is included in the table.

Basic Edit

This method is similar to the Advanced Wizard Edit method. When you open an RFQ, you see only the Cover Page. You do not see the other tabs. You must click Enter Responses in the process flowchart to display the Response Entry Form wizard.

Copying and Pasting Entries

A quick way to enter lines of similar quote information is to enter your bid information for one line and then copy and paste it to similar line items.

To copy and paste an entry:

1. In the Responses tab, select the line item with the completed bid information.
2. Choose Responses > Copy. The line item you selected is highlighted with a dotted line.
3. Select the line items you want to copy the bid information to.
4. Choose Responses > Paste.

Setting the Expiration Date

You can specify an expiration date for each line of your response.

Note	This option is available only when the RFQ Response uses quantity breaks. This option is not available when the RFQ Response uses price periods.
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To set the expiration date:

1. Select one or more line items in the RFQ Response Responses tab.
2. Choose Responses > Set Expiration Date. The Set Expiration date window appears.
3. Enter the expiration date in the Expiration Date field, or select a date from the calendar.
4. Click Set Date.

Proposing an Alternate Manufacturer Part



Suppliers are often requested to quote on parts they are unable to supply for various reasons. For example, the part may be obsolete or on allocation. You can suggest alternate parts in the RFQ Response.

You can add alternate part information for one or more items in an RFQ Response. This alternate part information is visible to the sourcing project manager when you submit your responses. If you propose an alternate part, you can add attachments such as data sheets.

To propose an alternate manufacturer part:

1. On the Responses tab of the RFQ Response, select the parts for which you want to propose alternates.



Note	You can propose alternates only for IPNs with an AML; you cannot propose an alternate for an IPN only.
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2. Choose Alternates > Propose.
3. Enter the alternate manufacturer part Number and Description.
4. Click the  button next to the Manufacturer list to search and select for the part's manufacturer. Click Go.
5. Fill up all the required information.
6. Click  to save the information and go on to the next item. Or click Finish to return to the Responses tab.

7. The added manufacturer part is identified by the  Supplier Proposed symbol.

Note If the proposed manufacturer is not currently in the Agile database, follow the workaround procedure.

To propose an alternate manufacturer part for a manufacturer not in the Agile Database:

1. Create a manufacturer and name it "New." For more information on how to create a manufacturer, see *Agile Product Cost Management User Guide*.
2. On the Responses tab of the RFQ Response, select the parts for which you want to propose alternates.
3. Choose Alternates > Propose, or from the Response Entry Form wizard, click Propose Alternates.
4. Click the  button next to the Manufacturer list to search for the part's manufacturer.
5. In the Search Objects wizard, Enter "new" in the Search field.
6. Click Next. You should see the manufacturer listed. Click Finish.
7. Click Go.
8. Fill out all the required information.
9. Click  to save the information and go on to the next item. Or click Finish to return to the Responses tab.

10. The added manufacturer part is identified by the  Supplier Proposed icon.

Adding an Attachment for an Alternate Part

The process of adding an attachment for an alternate part is the same as adding an attachment for any Agile PLM object.

To add an attachment:

1. On the Responses tab, select the alternate part to which you want to add an attachment.
2. Choose Alternates > Add Attachments. The *Project Manufacturer Part Information* page appears.
3. Click Add > Files, Add > URLs, or Add > By Search.
4. If you chose Add > Files, the *Add File* dialog appears.

Note Before reaching the Add File dialog box, you may see a dialog box asking if you prefer to use the advanced file productivity components method. If you chose Yes, further steps are carried out in a Java based dialog box. If you chose No, you will be led to the standard HTML based file search and add window.

Once you decide on a type of method, select the "Do not show this dialog again" checkbox.

- a. In the Add File dialog window, use the Browse button to locate the files you want.
- b. A file folder containing the attached files is created automatically. To add the selected files in one file folder object, check the Add All Files to a Single File Folder checkbox. (If you do not use this checkbox, a file folder object is created for each file you have selected.)

- c. When you have selected the files you want, click Finish in the dialog window. The file name and the newly created file folder object are listed in the Attachments table.
5. If you chose Add > URLs, the Add URLs dialog appears.
 - a. Enter the URLs. (You can copy a URL from your browser and paste it here.)
 - b. Click Preview to test each URL.
 - c. When you are through, click OK. The URLs and newly created file folder objects are listed in the Attachments table.
6. If you chose Add > By Search, the *Add Files By Search* window appears.
 - a. Follow the instructions in the Add Files Wizard dialog window to search for and select the file folder you want, then Select files or URLs in that file folder that you want.
 - b. After the file folders have been added to the table, you can select them and click Edit, which allows you to modify the file folder version and files you want to attach.
7. To return to the Responses tab, click the RFQ Response link in the navigation path, at the top left of the pane.

Deleting Proposed Alternate Parts

You can delete alternate parts that you have proposed.

To delete alternate parts:

1. On the Responses tab, select the alternate part you want to remove.

When you select an item, all its alternate parts are selected automatically. If an item has multiple alternate parts, you can select the item row itself and then go about deselecting the alternate parts you want to keep.
2. Choose Alternates > Delete.

Creating Offline Responses

You can export the items on the Responses tab to prepare a response. When you export items, Agile PLM generates a Comma-delimited text (CSV) file or an Excel workbook. The exported response file is named *RFQNumber.csv* or *RFQNumber.xls*.

You can use a spreadsheet program, such as Microsoft Excel, to edit a CSV file. You can also use a quoting tool to complete responses offline. After you complete the fields in a response file, you can import the file back into the Agile PLM system to submit the response to the sourcing manager.

Exporting RFQ Response Lines

You can export response lines to your local hard drive as a comma-delimited file (CSV) or Excel Workbook (XLS) file. You can modify these response lines in a spreadsheet application, such as Microsoft Excel, and import them back into PCM.

To export RFQ Response lines:

1. Select and open the RFQ Response you want to work with.
2. Go to Responses tab.

Note If you use Basic edit mode, the RFQ Response does not display tabs. You can click Export RFQ in the Response Process flowchart to export the entire RFQ Response.

3. Select the items you want to export.
4. In the tab menu, choose Responses > Export.
5. Select either CSV (Comma Separated) or Microsoft Excel Workbook, and then click Continue. The file type selection dialog box appears.
6. Select a file type and Click Continue. The File Download dialog box appears.
7. Click Save to save the file to your computer.
8. When the download is complete, click Close in the File type selection window.

Importing Previously Exported RFQ Response Files

Unlike other types of objects that you can import, supplier responses do not require that you map import fields to PCM fields. Since the response is a modified version of the exported text file, the mapping is automatic. For more information about Agile PLM import and export capabilities, see *Getting Started with Agile PLM*.

To import a RFQ Response file:

1. Select and open the RFQ Response you want to work with.
2. Click the Responses tab.
3. Choose Responses > Import. The Import wizard appears.
4. Click Browse; select the file you want to import.
5. If you are importing a CSV file, click Configuration to select the encoding type. You must select the same encoding type used to export the file. Click OK.
6. Click Import.

Editing Supplier Response Fields in Exported Supplier Response Files

The exported supplier response file is an Excel spreadsheet with a structured layout of RFQ header information and supplier response fields. The RFQ header rows are collapsible, while row & column headings are frozen panes that enable ease-of-reference to off-view fields.

Required fields are yellow colored, with bold headings and 'must be' filled for the response acceptance. *Requested* fields too are yellow colored however with normal headings, and are optional. Gray colored fields should not be filled at all, while the white colored fields are informational.

To successfully import an supplier response text file, you must follow these guidelines when you edit the file:

- You can reorder column headings, but do not edit or add any data to the headings. If you modify column headings, the file cannot be imported.
- Do not add new columns of data.

- Do not modify any date fields except for EOL Date and Expiration Date.

	AM	AN	AO	AP	AQ	AR	AS
22	Min *	Mult *	Lead Time (days) *	Inventory *	Terms of Sale *	Country of Origin *	NCNR *
23	4	6	27	97	CFR - COST AND FREIGHT	United States	No
24		6	7	29	CFR - COST AND FREIGHT	United States	No
25	7	5	38	24	CFR - COST AND FREIGHT	United States	No
26	9	2	57	39	CFR - COST AND FREIGHT	United States	No
27	4	8	39	31	CFR - COST AND FREIGHT	United States	No
28	3	9	66	61	CFR - COST AND FREIGHT	United States	No
29	8	2	63	57	CFR - COST AND FREIGHT	United States	No
30	1	7	86	29	CFR - COST AND FREIGHT	United States	No

Important If you fail to complete all required fields, you can still successfully import the file. However, you won't be able to submit the responses to the sourcing manager. Required and requested fields are specified by the sourcing manager who set up the project and RFQ.

- Empty fields are not imported. They are not equal to 0. To set a numeric field or a price field to 0, you must explicitly enter the value 0.
- If you prefer, you can remove the <HEADER> section at the top of the file since it is not imported. To remove this section, make sure you remove the two rows containing the <HEADER> and </HEADER> tags and all rows in between.
- When you import the supplier response file, the imported data replaces existing response field data.

When you edit a supplier response file, make sure you edit only fields you are allowed to edit. Generally, this means the columns from Bid Decision to Material Price, inclusive. Other fields are for viewing only.

You can import the supplier response file multiple times. Each time you import the file, only the editable fields are imported, replacing the previous values. The fields that appear in a supplier response file depend on whether the sourcing manager specified them as requested and required.

Valid Values for Supplier Response Fields

Certain supplier response fields require specific values that must be spelled correctly. If you type an invalid value in the field, it won't be imported. The following table shows the valid values for the supplier response fields that require specific values.

Note The header for the supplier response file also lists values for these fields.

Field	Valid values	Note
Bid Decision	Bid Bid - Alternate Part No Bid - Non-Franchise No Bid - Obsolete Part No Bid - On Allocation No Bid - Other No Bid - Unknown Part Not Responded	

Field	Valid values	Note
Country of Origin		Enter a valid country name. Make sure the spelling is correct.
NCNR	Yes, No	Non Cancellable Non Returnable
Terms of Sale	CFR	Cost and Freight
	CIF	Cost, Insurance, and Freight
	CIP	Carriage and Insurance Paid To
	CPT	Carriage Paid To
	DAF	Delivered at Frontier
	DDP	Delivered Duty Paid
	DDU	Delivered Duty Unpaid
	DEQ	Delivered Ex Quay (Duty Paid)
	DES	Delivered Ex Ship
	EXW	Ex Works
	FAS	Free Alongside Ship
	FCA	Free Carrier
	FOB	Free on Board Vessel

Note In addition to the three-letter abbreviations for Terms of Sale, you can enter the full Terms of Sale value, for example, “CFR - COST AND FREIGHT” or “CIF - COST, INSURANCE AND FREIGHT.” The value must be all uppercase.

Viewing BOM Attachments

To view items that are custom components with attached critical documents, use the Content BOM view to expand item attachments to the BOM. This feature needs to be setup by the author of the RFQ. For more information on setting up and enabling suppliers to view the Content BOM, refer to *Agile PLM Product Cost Management User Guide*.

Note Some custom components have critical information attached such as Test Specifications and Packaging Specifications that could influence the cost that suppliers will bid.

Costed BOM View

A Costed BOM view shows your bids on each item and the rolled up cost for the assembly.

Note The Costed BOM button that displays the Costed BOM view is available if your supplier organization is designated as a partner for the sourcing project or if the buyer has explicitly shared the BOM in order for you to see it.

To use the Costed BOM View:

1. Login as the supplier's contact person and open the RFQ.
2. On the Responses tab, Click the Costed BOM button. The Costed BOM View appears.
3. To view a specific price scenario:
 - a. Select Selected Price Scenario in the Price Scenarios drop-down list. The Price Scenarios dialog box appears.
 - b. Select the price scenario information from the Available Values, and then click right arrow to add to the Selected Values list.
 - c. Click OK.
4. To return to the Responses tab, click Back.

Content BOM View

The Content BOM view will be available on the RFQ Response's Responses tab if configured in the project or RFQ as "data to share with suppliers."

With the Content BOM option available, it permits children nodes in the BOM to show up in the supplier's view. This can be very helpful if some of the BOM's nested items are documents that would influence the supplier's cost bid. Some documents like Test Specs and Packaging Specs will be available in the Content BOM page.

To access the Content BOM view:

1. Login as the contact person of the supplier, and open the RFQ.
2. In the RFQ, click on the Responses tab.
3. Click the Content BOM button.
4. The BOM Content page opens, so that you can see all of the BOM items and children nodes, including important documents.

Assembly Cost Report

The Assembly Cost (Supplier Response) report shows the costs at each level of the BOM structure for one or more top-level assemblies. The results of the Supplier Assembly Cost report mirror what the sourcing manager sees.


The following task provides a simple guideline to running and viewing the Assembly Cost (Supplier Response) report.


Note	For more information about working with reports, see the Agile Reports section of <i>Getting Started with Agile PLM</i> .
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To run the Assembly Cost (Supplier Response) report:

1. In the navigation pane on the left, click the button that opens the Reports Folders.
2. In the Sourcing Reports folder, select the Assembly Cost (Supplier Response) Report.


The tabbed report object page appears in the right pane.

3. To run a report, click the Execute button. The report wizard page appears.
4. In the *Select Layout and Configuration* step, select Default Layout from Layout type drop-down list. Click Next.
5. In the *Select Response* step, select the RFQ Response you want to use from the drop-down list. Click Next.
6. In the *Select Items* step, Click  next to the Assembly Lines field to choose the assembly lines (BOMs) you want.
7. Select the assemblies you want and use the arrow buttons to move them to the Selected Values list. Click OK.

8. Click  next to the Price Scenarios field to choose the price scenarios you want in the report. Your choices are outlined below.

To select one or more price scenarios:

Price scenarios can include quantity breaks and/or price periods. You may want to run reports about all or only selected price scenarios.

- a. Select the first radio button option.
- b. Click  to select the price scenarios you want to use. Use the arrow buttons to move them to the Selected Values list.
- c. Click OK.

To select the current and previous price periods:

You might want to run reports about the current price period or the current period combined with some previous price periods.

- d. Select the second radio button option.
- e. In the drop-down list, select the number of price periods you want to use. PCM starts with the current price period, so select 1 to use only the current price period. For example, if you select 3, the current price period and the 2 previous price periods are used in the report.

To select price periods, starting with an offset from the current price period:

- f. Select the third radio button option.
- g. In the first drop-down list, select the number of price periods you want to use in the report. Define the starting price period by showing how it relates to the current price period.
- h. Use the second drop-down list to select + or -. (Plus means you want to start after the current price period. Minus means you want to start prior to the current price period.)
- i. Enter a number in the field to show how many price periods + or - the current price period to start.

As an example, consider a project with weekly price periods. You select 3 price periods, starting -5 price periods from the current price period. In this case, the starting price period is the 5th week before the current week. The price periods in the report will include the 5th, 4th, and 3rd weeks before the current week.


9. When you have completed the Select Items wizard step, click Finish to run the report.

The report is generated and displayed in a separate window. You can use the buttons in the window to print, export, or save the report. Saved reports can be viewed on the Historical Reports tab of the tabbed report object page. For more information about working with reports, see


Getting Started with Agile PLM.

Submitting Responses

You can make changes and resubmit RFQ response lines anytime, and as many times as you wish, until the response line is closed by the sourcing manager.

The system shows you which lines are incomplete. When lines have incomplete information, they appear on the Responses tab with an Invalid icon  in the Supplier Response Status column to the left of the item number.

To fill in an incomplete response line:

1. Click the Invalid icon  in the Response Line Status column to the left of the item number. The Response Entry Form for the item appears, or the page switches to edit mode, depending on which response entry method is specified. The invalid fields are highlighted. For details, see [RFQ Response Edit Mode](#) (on page 8).
2. Modify the invalid fields.
3. When you are finished, click Finish.

When you have finished entering or modifying response lines, you can submit the response.

To submit a line item:

1. Select one or more RFQ response lines on the Responses tab. If you're using the Basic method, all items are automatically selected.
2. In the tab menu, choose the Responses > Submit. If there are lines with incomplete information, an error message appears on the Responses tab. The completed lines are immediately submitted to the sourcing manager. The invalid or incomplete lines are not submitted.

To submit the complete RFQ:

1. Select the checkbox at the top of the column to select all response lines.
2. In the tab menu, choose the Responses > Submit. If there are lines with incomplete information, an error message appears on the Responses tab. The completed lines are immediately submitted to the sourcing manager. The invalid or incomplete lines are not submitted.

Reviewing RFQ Response Changes

The Changes tab of the RFQ Response allows you to review RFQ content changes or modifications made by the sourcing manager.

You can see the RFQ line items that have been added or deleted by choosing Views > Items on the Changes tab.


You can see RFQ line items with changes by choosing Views > Responses on the Changes tab, and then clicking the change icon at the line item level.

Reviewing Changes to Response Lines

After you create responses, you can review them to ensure that all response line items are

complete and correct. You can filter the response line to show only the lines you want to view. The most useful filter options are Decision, which displays the line item details by the bid decision, and Response Status. The RFQ Response lines with a decision of BID are validated to ensure that all required fields have been filled in. Even if you fill in part of the information, the sourcing project manager will not see a line item that is not filled out completely.

Once the sourcing project manager closes a response line, it can no longer be submitted to the buyer.

On the Responses tab of the RFQ Response object, click the View Response Changes icon  in the Response Changes column to view changes you have made to the response information for that item.

Click the Details icon  in the Price Details column of the response table to view details about the response line.

Changing Submitted Responses

If you have the appropriate privileges, you can make changes to submitted line items. Usually, you cannot make changes if the line item or RFQ status is locked or closed. See [Entering and Modifying RFQ Response Information](#) (on page 30). You cannot submit responses if the RFQ status is locked or closed.

Occasionally, a supplier manager modifies RFQ Responses because of the following:

- Data correction requirements
- Due date changes
- Addition of new RFQ line items
- Request for requote

You receive notifications about changes that have been performed. You can display the Changes tab of an RFQ Response to view the changes.

Based on the type of change, you might need to complete a new response line, provide a requote for an existing line item, or provide additional data.

Using Discussions

When you are negotiating with the buyers who send you requests for quotes, you often need to have informal, threaded dialogue to share information and to finalize quotes. You can also carry on discussions with other users in your organization. You can reply to messages and add and remove discussions.

Discussions replace the conventional email messaging service. Like email, discussions have a subject line, message area, priority, and a notification list. You can reply to the discussion as you reply to an email. Recipients receive the discussion as a notification in their inbox. Only Agile PLM users can participate in discussions.

Adding a Discussion


You can add discussions based on different subjects.

To add existing discussions:

1. Open the RFQ Response, and click the Discussions tab.
2. Click Add. The Add Discussions wizard appears. You can search for existing discussions, or you can create a new discussion.
3. To add an existing discussion, choose one of the search methods and Click Next.
4. Depending on the search method you choose, if needed select the appropriate criteria, saved search, or bookmark and Click Next
5. In the search results table, select one or more discussions. Click Finish.

The discussions are added to the Discussions tab of the RFQ Response object.

To create a new discussion:


1. Open the RFQ Response, and click the Discussions tab.
2. Click Add. The *Add Discussions Wizard* appears.
3. In the *Enter General Information* page, select the Discussion type from the drop-down list.
4. Enter the subject in the Subject field.
5. Enter discussion text in the Message field.
6. Select the priority from the Priority drop-down list.
7. Click the  button next to the Notify List field, and select the names of recipients.
8. Click Finish.

The discussion is sent as a notification to the specified users. It is also added to the Discussions tab of the RFQ Response object.

Replying to a Discussion

You can reply to discussions that you are included in. Replying to a discussion is similar to replying to an email. You can find the discussion notification in your inbox. You need to have the (Restricted) Discussion Participant role assigned to you to reply to a discussion.


To reply to a discussion from the Discussions tab of the RFQ Response object:

1. Open the RFQ Response and go to the Discussions tab.
2. Select the row of the discussion you want to reply and Click the Reply button. The *Discussion Reply* window appears.
3. Enter the reply in the Message field.
4. Click the  button next to the Notify List field to remove or add the names of recipients.
5. Click Save.

If you click the Subject, the Discussion window appears.

In the Discussions tab on this page, you will see the Message Threads and Action Items.

To reply to discussions:


1. Open your inbox.
2. Click the text in the Regarding field to open the discussion notification. 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. Click the  button next to the Notify List field, and select the names of recipients.
7. Click Save. The reply is added to the list on the Replies tab.

Note You can reply to a message any number of times.

Removing Discussions

After you finish all your discussions, you can remove them from the Discussions tab of the RFQ Response object. If you have the (Restricted) Discussion Participant role, you can delete the individual discussion messages.

To remove discussions or discussion lines from the Discussions tab of an RFQ Response object:

1. Open the RFQ Response and click the Discussions tab to bring it forward.
2. Click the radio button to select the discussion you want.
Or, expand the discussion (click ) and select the specific discussion lines you want.
3. Click Delete on the Discussions tab.

Note The child discussion lines are deleted if parent is deleted.

To work directly with the discussion object, you can open it from your inbox and delete the discussion lines you choose on the discussion object Replies tab.

Collaborating on Pricing and Contract Information

This chapter includes the following:

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▪ Creating Prices	48
▪ About Price Change Orders.....	52
▪ Creating PCOs.....	53

About Prices

The Agile PLM system can store information about different prices for different items. Users in departments throughout the buyer organization can access this information to use in finalizing the prices for an item or manufacturer part.

The process of managing prices involves three objects:

- **Price** — This is where you record the 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.
- **Price Line** — 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. A Price object may have multiple Price Lines, because several of the price and terms attributes are dependent on the context (for example, Ship-To Location).
- **Price Change Order (PCO)** — A price change order is the route for revising or deleting the price information about an object. A price change order 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.

If you have the (Restricted) Price Collaborator role, you can participate in the price management process, including creating price objects, creating and submitting PCOs, modifying price lines, and approving PCOs

An item can have many revisions due to the content change, manufacturing change orders, engineering change orders, and so on. Each change is called a revision, and this page displays the price information for the specific revision of the item. All the price lines associated with the price object are for the specified revision of the item only.

Creating Prices


Agile users with the appropriate privileges can create or modify a price object. You can create a price in the following ways:

- From the Create menu.
As a supplier user, this is the method you will use to create price objects. This is the method discussed in this manual.
- Using the Import command.
For more information about using the Import command, see *Getting Started with Agile PLM*.


To create a price:

1. Choose Create > Price > Published Price. The *Create Published Prices* window appears.

Important When you create a price, you must select the subclass type, an Item or MFR part, Supplier, Customer, and Program associations. The Price Creation wizard leads you through all the steps.

2. Select either Contract or Published Price from the Price Type drop-down list.
3. Enter the unique identification number for the price, or click to assign a system-generated number for the price.
4. Select the type of object (Item or Manufacturer Part) from the drop-down list. Click the  button to select the item(s) or manufacturer part(s). Select the revision of the item or manufacturer part (if any) from Rev drop-down list.
5. Select the manufacturing site from the drop-down list.

Note If a manufacturing site is selected, the item price information applies to the items or manufacturer parts manufactured at that site only. If the field is left blank, the price information applies to the item or manufacturer part regardless of the manufacturing site.

6. Click  to find and select the supplier. As a supplier users, select your own supplier organization.
7. Select a program from the drop-down list.



Note If the 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.

8. Select the customer from the drop-down list.

Note 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 programs.

9. Click <continue>. The *Published Price Creation Wizard :: Enter Title Block Information* page appears.

To enter "General Information" tab information:

1. Enter any information about the price in the Description field.
2. Click the  button next to the Owner field, and select the owner from the list.
3. Click the  button next to the Authorized Suppliers field, and select the authorized suppliers of the item from the list.
4. Select the end of life date of the item or manufacturer part from the Part EOL Date calendar.
5. Enter the minimum quantity that should be ordered in the Min field.
6. Enter the number of units in a package in the Mult field.
7. Enter the available stock in the Inventory field.
8. Select Yes or No from NCNR drop down list.

NCNR stands for Non-Cancelable Non-Returnable and it applies to an item. This is one of the critical factors that a buyer uses 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.

9. Click Next. The *Add Price Line* window appears. For information about adding price lines, see [Adding Price Lines](#) (on page 52).
10. Click Next in the Add Price Line window. The *Add Attachments* page appears. Add attachments as necessary, and click Finish. For information about adding attachments, see *Getting Started with Agile PLM*.

General Information Tab

The General Information tab has fields that contain the general information about the price. It includes the following fields:

Field	Editable?	Description
Mfr. Part Number	No	The unique identification number of the item for which the price is intended for.
Mfr. Name	No	The name of the manufacturer
Supplier	No	The supplier of the item.
Price Type	No	The type (subclass) of the price object. The default types are Contract, Published Price, and Quote History. The Agile administrator can rename the price types or create additional price types.
Number	No	The unique identification number of the price object.
Description	Yes	The description of the price object.

Lifecycle Phase	No	The lifecycle phase of the price.
Version	No	The version of the price.
Allow Qty Breaks	Yes	A flag indicating whether the price information applies to quantity breaks or not.
Owner	Yes	The user responsible for the price information
Customer	No	The customer to which the price information applies. If customer is not specified, the price information applies to all customers.
Program	No	The program for which the price information applies. If program is not specified, the price information applies to all programs.
Manufacturing Site	No	The site where the item is being manufactured. The price information applies only to the item manufactured at that site.
Authorized Suppliers	Yes	The other authorized suppliers supplying the item.
Part EOL Date	Yes	The end of life date of the item.
Min	Yes	The minimum quantity for which the price information applies.
Mult	Yes	Indicates that the packaging delivers the item in multiple units; this value states how many are in each package.
NCNR	Yes	The Non Cancelable Non Returnable flag for the item.
Inventory	Yes	The available inventory.
Version Release Date	No	The date the price was released.
Effectivity Date	No	The date the price information comes into effect.
Contract Number	No	The number of the associated contract.
Flex fields	Yes/No	The other flex fields, visible only if defined by your system administrator.

To edit the information, click the Edit button.

Changes Tab

The Changes tab displays pending and historical changes that affect the price. Agile 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.

▫ Pending Changes Table

The Pending Changes table displays any unreleased PCOs in which the given price is listed on the Affected Prices tab. You can click the link to a pending change to see what it proposes.

▫ Changes History Table

The Change History table displays any released PCOs where the price is listed on the Affected Prices tab. You can click the link to a released PCOs to see what it contains and what price changes were made.

To open a change listed on the Changes tab, click its number. The change opens with the Cover Page tab on top.

Note Although its name is similar, the History tab shows actions taken on a price, while the Change History table on the Changes tab lists released and canceled changes for the price.

Price Lines Tab

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.

Note The Agile administrator can configure the Agile system to disallow overlapping price lines. Contact the sourcing manager or the Agile administrator to determine if overlapping price lines are allowed.

The Price Lines tab includes the following fields:

Required Fields	
Ship To	The place the item will be shipped to.
Price Effective From Date	The date the price takes effect.
Currency Code	The unique identification code for the currency.
Optional	
Ship From	The place the item is shipped from.
Price Effective To Date	The date the price no longer applies.
Qty	The quantity (in its own unit of measure) for which the price applies.
Conversion Date	The currency conversion date.
Material Price	The per unit material cost of the item.
Non Recurring Cost	The one time cost which shall be applicable when the buyer first buys the item.
Lead Time	The number of days required to supply the item.
Transportation Terms	The terms and conditions for transporting the items.
Country of Origin	The country where the item is manufactured.
PriceLine Notes	Any specific information about the price line.

The following are not any field names, but

- Conversion Rate — The rate at which the currency will be normalized to the project currency.
- Total Price — The total price is sum of Total Material Price and Total Non Material Price.
- Total Material Price — The total material price of the item.
- Total Non Material Price — The cost of the item not associated with materials, for example, labor rate, sales tax, and other over heads.
- Project Number — The unique identification number of the project if the price line is associated with the project.

Adding Price Lines

You can add a price line if the price object is in the Preliminary lifecycle phase. If an associated PCO has been released, you can add the price line only through the current or a new PCO.

To add a price line, click Add on the Price Lines tab to display the *Add Price Line* wizard. Enter the price and terms information as required in the wizard. Click Add More to add another price line. Click Finish when completed.

Removing Price Lines

You can remove a price line if the price object is in a Preliminary lifecycle phase. If the associated PCO has been released, you can remove the price line only through the current or a new PCO.

To remove a price line, select the row(s) of the price line(s) and click Remove.

Editing Price Lines

You can edit a price line if the price object is in the Preliminary lifecycle phase. If the associated PCO has been released, you can modify the price line only through the current or a new PCO.

To edit a price line, select the row(s) of the price line(s) and Click Edit. Modify the price line details, and click Save.

Price Lifecycle Phases

By default, price object have the following lifecycle phases. The Agile administrator can rename lifecycle phases or create new lifecycle phases.

- Preliminary
- Active
- Inactive
- Obsolete

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 include on its Affected Prices tab multiple price objects that can be associated with different items, but a price object cannot be included on the Affected Prices tab of more than one pending PCO.

The following table shows the tabs and the default fields for changes. The Agile administrator may have added additional tabs, called Page Two and Page Three by default. These tabs contain custom fields defined by the administrator. The Relationships tab appears only if the Agile administrator has enabled them.

Tab name	Tab information includes
Cover Page	General information about the PCO plus any unique fields defined by the Agile administrator. See Cover Page Tab.
Affected Prices	Which price objects are affected by the PCO. PCOs include redlined price lines, and file folders (attachments). Affected Prices Tab (on page 57).
Workflow	Approvers and observers of the PCO and the results of their reviewing the PCO. For more information about working with routable objects and workflows, see the chapter about routing objects with workflows in <i>Getting Started with Agile PLM</i> .
Relationships	Lists objects that affect the status of the PCO and lists objects whose status is affected by the PCO. For more information about relationships, see the section about relationships and references between objects in <i>Getting Started with Agile PLM</i> .
Attachments	Lists the references to attached files and URLs contained in file folder objects. For more information about file folders and attachments, see the chapter about working with file folder objects and attachment files in <i>Getting Started with Agile PLM</i> .
History	All actions taken on the change.

The following sections describe the tabs that display information about changes and the information you can find on them.

Creating PCOs


If you have the appropriate privileges, you can create or modify a PCO. This section describes two ways you can create a PCO:

- From the Create menu on the main menu bar
- From the Actions menu on the Price page

You can also import PCOs into Agile. For information about importing, see *Getting Started with Agile PLM*.

You can create PCOs from prices or from the Create menu on the main menu bar. When you create a PCO from the price (Actions | Add to Change), 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  > Change > Price Change Orders. The *Create Price Change Orders* window appears.
2. Select PCO from the Type drop-down list.
3. Enter a unique identification number for the PCO, or click to assign a system-generated number.
4. Click <continue>, if you have selected the "continue creation in Wizard" checkbox. The window closes, returning you to *PCO Creation Wizard | Enter Information for "Cover Page" tab* page on the main browser. Else Click Finish
5. Select a category from the Change Category drop-down list.
6. Enter the Description of Change and the Reason for Change in the corresponding fields.
7. Select the Reason Code and Workflow from the corresponding drop-down lists.
8. Find and Select the Price Administrator to whom the PCO should be forwarded.
9. Find and Select the Originator By default, the originator is the user who creates the PCO.
10. Find and Select the affected Product Lines.
11. Click Next. The *Add Affected Prices* page appears.
12. Click Add to add the price of the item. The *Add Affected Prices Wizard* window appears.
13. Search for the price and <lick> OK. The *Edit Newly Added Rows* page appears.
14. Change the Lifecycle Phase and Effective Date, if required.
For information about searches, see *Getting Started with Agile PLM*. For information about creating prices, see [Creating Prices](#) (on page 48).
15. Click Next. The *Add Attachments* page appears.
16. Click Add to add references to files related to the PCO. For more information about attachments and file folders, see the chapter about working with file folder objects and attachment files in *Getting Started with Agile PLM*.
17. Click Finish.

To create a PCO from the price object:

1. Open the Price object.
2. Choose Actions > Add to Change. The *Create Changes* window appears.
3. Select PCO from the Type drop-down list.
4. Enter a unique identification number for the PCO, or click to assign a system-generated number.
5. Click <continue> and follow the #4 through #17 given in "To create a PCO from Create menu"

After you create a PCO, the Cover Page tab appears with general information about the PCO.

On the Attachments tab you can add references to files related to the PCO. For more information about attachments and file folders, see the chapter about working with file folder objects and

attachment files in *Getting Started with Agile PLM*.

You can view the log of actions that were taken on the PCO since it was created on the History tab. For more information, see *Getting Started with Agile PLM*.

Adding the Current Price Object to an Existing PCO

To add the current price object to the Affected Prices tab of an existing PCO:

1. Open a Price Object
2. Click Add to Change > Search in Actions drop-down list. The *Add to Change* window
3. Use a search method you want and select a PCO from the Results.
4. Click OK. The *Edit Newly Added Rows* page appears.
For more information about searches, see *Getting Started with Agile PLM*.
5. Make requisite changes, if required. Click Save to Finish. The PCO page appears.
6. The price object is listed in Affected Prices tab.

Cover Page Tab

The Cover Page tab shows the information traditionally shown on a paper PCO form. Agile completes some of the fields; you complete the rest.

Buttons on the Cover Page Tab

The Cover Page tab has the following buttons:

- Edit — appears when the Cover Page is not in edit mode. To edit the Cover Page, click Edit.
- Save — appears when the Cover Page 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 Cover Page is in edit mode. To undo the changes that you made to the tab while it was in edit mode, click Cancel.

Validate — appears when the Cover Page is in edit mode. After you enter field values on the Cover Page, click this button to update the list of matching workflows available in the Workflow field.

Sometimes you cannot edit a field. A field may be uneditable for two reasons:

- The change has been released.
- You do not have sufficient privileges or the appropriate license to modify that field.

Fields on the Cover Page Tab

The following table summarizes the Cover Page fields of the Price Change Order, how each field is completed, and what each field contains.

The Cover Page can contain two additional sections, called Page Two and Page Three by default; the Agile administrator determines whether these sections are enabled, and what they are called.

Field	How completed	Contents
Number	Automatically, when created.	The number assigned to the change when you create it.
Status	Automatically, when created; updated as the change moves through the assigned workflow.	Change status, described in "Status on the Cover Page Tab"; if no workflow has been selected, this field is Unassigned.
Change Type	Automatically, when created.	The type (subclass) of change selected when you create the change.
Change Category	Usually manually; can contain a default.	Drop-down list of categories defined by the Agile administrator.
Description Of Change	Usually manually; can contain a default.	Enter a meaningful description of the PCO.
Reason For Change	Usually manually; can contain a default.	Enter the reason you are changing the price objects.
Reason Code	Usually automatically, when created (with the default set by the Agile administrator).	Drop-down list of categories defined by the Agile administrator.
Workflow	Automatically (if only one workflow applies to the change), when the change is moved to the next status from the Unassigned status. If more than one workflow applies to the change, the workflow is selected manually; the workflow selection can be changed as long as the change is in the Pending status type. Selecting the blank field in the Workflow drop-down list switches the change to the Unassigned status.	The name of the workflow being used to move this change through the change control process.
Price Admin	May be provided automatically by the workflow; otherwise selected manually from a drop-down list. User groups appear first in the list, followed by individual usernames.	Default routing manager. If the workflow is defined to notify the default price administrator, the user group or user in this field receives notifications about the PCO. If this field is left blank, then the notifications are sent to every price administrator on the list. If the notification definition in the workflow is blank, no notifications are sent.
Originator	Usually automatically, when created (with the default set by the Agile administrator).	The user who created the change (can be selected from a drop-down list).
Date Originated	Usually automatically, when created.	The date the change was created.
Date Released	Automatically, when released.	The date the change was released.
Final Complete Date	Automatically, when the change enters the Complete status type.	The date the change moved into the Complete status type.

Field	How completed	Contents
Product Line(s)	Usually manually; can contain a default.	Drop-down list of categories defined by the Agile administrator.

Status on the Cover Page Tab

A “stamp” in the top right corner of a change indicates the status of the change. The Agile administrator defines the name of each status in each workflow. The workflow status is also listed in the Status field on the Cover Page tab.

Note The Agile administrator may have created customized workflows and status stamps for your company. The table below lists only the Agile default workflow statuses for PCOs.

Status stamp name	Status definition
Unassigned (no status type)	No workflow has been assigned to this change. The originator may still be developing the change. No statuses are displayed on the Workflow tab.
Pending (Pending status type)	The originator may still be developing the change. It has not yet been submitted to the price administrator.
Submitted (Submit status type)	The change has been routed to the price administrator for review and analysis.
CCB (Review status type)	The change has been routed to the members of the Change Control Board (CCB) for approval.
Released (Released status type)	The change has been signed off by the CCB members and released.
Implemented (Complete status type)	The PCO has been implemented or incorporated into new drawings.
Hold (Hold status type)	The change has been placed on hold while information is being gathered by the price administrator.
Canceled (Cancel status type)	The change has been cancelled due to a fundamental flaw or rejection by several people.

The Workflow tab shows all the statuses the change has been through and the statuses remaining to complete the change control process. (See Workflow Tab)

Affected Prices Tab

The Affected Prices table for PCOs has the following columns by default; the Agile administrator may have modified the table:

- Price Number — the number assigned to the price.

- Price Description — the description of the price.
- Item Number — the number assigned to the item associated with the price.
- Item Rev — the revision of the item associated with the price.
- Manufacturer Part Number — the number assigned to the part by the manufacturer. The manufacturer name and manufacturer part number comprise the unique identifier for the manufacturer part associated with the price.
- Mfr Name — the name of the manufacturer of the part associated with the price.
- Old Lifecycle Phase — the lifecycle phase of the price before the change was released.
- New Rev — the revision (of the affected price) that will be created when the change is released.
- Effective Date — the date on which the change takes effect.
- Lifecycle Phase — the lifecycle phase that the price will be in after the change is released.
- Change Function — provides these choices: Interchangeable (new revision of a price that is compatible with the old revision), Non Functional (no change to a price, only to price documentation), and Release (new price).
- Redline column — can include the following buttons, which you can click to create or edit redlines:
 - (Has been redlined): indicates that there are redlines on the BOM, manufacturers, or attachments for that item.
 - (Do redlining): lets you add redlines.

These additional columns are present for PCOs by default. These fields are filled in automatically.

- Customer — the sourcing manager's customer.
- Program — the program associated with this price object. "All" is a valid entry. A program is a group of BOMs that are managed together. The Agile administrator defines programs.
- Supplier — the supplier of the item affected by the price object. In this case, it is your supplier organization.
- Inventory — the number of units currently in inventory.
- Min — the minimum number of units that can be purchased at one time.
- Mult — if the units must be purchased as a package of multiple parts, the number of units in each package, for example a dozen, 50, or 100.
- EOL Date — end of life date of the part.
- Manufacturing Site — the manufacturing site (as defined by the sourcing organization) where the part will be used.

Adding Prices

To add a price to the Affect Prices tab:

1. In the Affected Prices tab, click Add.

The *Add Affected Prices Wizard* window appears.

2. Select a search method to find the price you want, or create a new price.
3. From the search results, select the PCO you want and Click OK. The *Edit Newly Added Rows* page appears.
4. Make changes in the Lifecycle Phase and Effective Date, if required. Click Save to Finish. The Price object appears in the Affected Prices table.

Auto-populating Effective Date

Through a price change order, the price of an item is affected. However, the affected price does not come into effect until an Effective Date is defined. You can set this date either by editing prices selectively or by populating a common date to a number of price objects.

To Auto Populate an Effective Date:

1. In the Affected Prices tab, select the row(s) of price(s) that you wish to make effective from a desired date.
2. Click Auto Populate Effective Date button. The *Auto Populate Effective Date* window appears.
3. Click the calendar button next to Enter a Date field and select a date.
4. Click Set Date.
5. Select Apply to All Items checkbox if you wish to set the date to all the prices in Affected Prices tab.

Removing Prices

To remove a price from the Affected Prices table:

1. On the Affected Prices tab, select the row(s) of the price(s) you want to remove.
2. Click Remove.
3. When you are prompted to confirm the removal, Click OK.

Editing Prices


To edit affected prices information in the Affected Prices table:

1. In the Affected Prices tab, select the row(s) of the price(s) you want to edit.
2. Click Edit.
You can now modify the editable fields in the table rows you selected.
3. When you are finished, click Save.

Creating and Editing Price Redlines

On the Price List Redline tab, you can redline the price list of an affected price listed on a PCO.

To open the Price List Redline tab:

1. On the Affected Prices tab, Click the Do Redlining icon  in the row of the price you want to redline. The Price List Redline tab page appears.
2. To add price lines to the price, click Add. The *Add Price Line | Enter Price Line Details* window

appears. For details, see [Adding Price Lines](#) (on page 52).

3. To redline an existing Price Line, select the desired row(s) in the table and Click Edit. Editing, deleting, and undoing redlines affects only the selected rows of prices on the Price List Redline tab.

Note	You must have the required privileges to redline prices.
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4. When you are finished, click the Back to PCOxxxxx button to return to the Affected Prices tab of the PCO.

The Price List Redline tab has the following buttons:

- Edit – lets you redline the selected rows of the Redline price table.
- Delete – redline-deletes the selected price line from the price.
- Undo Redlines – clears the redlines from the selected rows.
- Add – lets you redline-add price line to the price.

Workflow Tab

The Workflow tab shows all the statuses the PCO has passed through, and which statuses remain to be completed. It also shows all the approvals and rejections made during each approval cycle.

Note	For detailed information about working with the Workflow tab of routable objects, see the chapter about routing objects with workflows in <i>Getting Started with Agile PLM</i> .
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For example, if a PCO is returned to the originator, reworked, and then resubmitted for a second approval cycle. The Workflow tab shows the approvals and rejections of the PCO made during the first approval cycle and during the second approval cycle.

Depending on where the PCO is in the workflow, the Workflow tab can have up to three sections:

- Workflow Overview Section
- Summary Table
- Signoff History Table

Workflow Overview Section

The top section in the Workflow tab (visible for all changes that have been assigned a workflow) displays the name of the assigned workflow and a flow chart of the workflow, highlighting the current status of the change.

Some of the statuses in the flow chart are links, which are identifiable by their underline. You can switch the change to one of these statuses by clicking the link and filling in the Notify field. You need sufficient privileges to do this.

The status with an orange background is the current status.

Signoff Summary

The Signoff Summary (visible for changes in a Review or Released status) lists the signoff

information for the current state. It has the following columns by default; the Agile administrator may have modified the table:

- Reviewer — the user who reviewed the change. This can be an approver or an observer, and it can be a single user or a user group.
- Req'd — whether the reviewer is a required reviewer (approver) or not (observer).
- Action (Image) — icon indicating whether the user approved or rejected the change.
- Action — the action taken by the reviewer.
- Signoff User — the name of the user who actually approved or rejected the change.
- Local Client Time — the date and time of the action.
- Signoff Comments — any comments made by the reviewers (approvers and observers) during signoff.

Signoff History

The Signoff History table in the Workflow tab lists past workflow(s) and signoff information for the change. It has the following columns by default; the Agile administrator may have modified the table:

- Workflow — the name of the workflow that the change is following.
- Workflow Status — the name of the status.
- Reviewer — the user who reviewed the change. This can be an approver or an observer, and it can be a single user or a user group.
- Req'd — whether the reviewer is a required reviewer (approver) or not (observer).
- Action — the action taken by the reviewer.
- Action (Image) — icon indicating whether the user approved or rejected the change.
- Signoff User — the name of the user who actually approved or rejected the change.
- Status Changed By — the name of the user who switched the status.
- Local Client Time — the date and time of the action.
- Signoff Comments — any comments made by the reviewers (approvers and observers) during signoff.

The ability to use Add Approvers/Observers and Remove Approvers/Observers buttons is controlled by the settings in each workflow. In addition, you must have the appropriate privileges to add or remove approvers and observers. If you do not have the appropriate privileges, the buttons are disabled.

User Action Timestamp

Agile provides two ways to record the date and time of any action taken against the change:

- Local Client Time — this is the date and time as shown on the local client computer of the user who is viewing the timestamp. Local client time is the default method of viewing timestamps.

For example, if Mary approves a change at 12 noon in New York (Eastern time), when John

looks at the Workflow tab of the change in California, he sees the time Mary approved the change as 9 o'clock in the morning (Pacific time).

- User Action Time — this is the date and time on the computer where the action was performed. User action time is optional.

If Mary approves a change at 12 noon in New York, when John in California looks at the Workflow tab of the change, he sees the following:

- In the Local Client Time column, the time Mary approved the change is 9 o'clock in the morning (Pacific time).
- In the User Action Time column, the time Mary approved the change is 12 noon (Eastern time).

When Mary looks at the Workflow tab of the change, she sees the following:

- In the Local Client Time column, the time she approved the change is 12 noon (Eastern time).
- In the User Action Time column, the time she approved the change is 12 noon (Eastern time).

Local Client Time always appears on the Workflow tab and the History tab. User Action Time is optional, and is displayed on the Workflow tab of changes and the History tab of any Agile object only if the Agile administrator specifies this.