

# **Agile Product Lifecycle Management**

Product Cost Management User Guide

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# Preface

Agile PLM is a comprehensive enterprise PLM solution for managing your product value chain.

## Audience

This document is intended for administrators and users of the Agile PLM products.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Related Documents

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The Oracle Technology Network (OTN) Web site <http://www.oracle.com/technetwork/documentation/agile-085940.html> contains the latest versions of the 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 Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

## Conventions

The following text conventions are used in this document:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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# Introduction

This chapter provides an introduction to the Agile Product Cost Management solution.

## Overview of the Agile PLM Suite

- Agile Product Collaboration (PC) - Management and collaboration of product record information throughout the product lifecycle, across internal organizations and the extended supply chain.
- Agile Product Governance & Compliance (PG&C) - Management and tracking of all substances and materials contained by any item or manufacturer part, allowing companies to meet substance restrictions and reporting requirements, design recyclable products, minimize compliance costs, and eliminate noncompliance on future products.
- Agile Product Portfolio Management (PPM) - Integration of project and product information in the context of overall product development in order to streamline business processes across the product portfolio and lifecycle.
- Agile Product Quality Management (PQM) - Management of customer, supplier and product quality issues, tied to the product design via a closed loop corrective action process.
- Agile Product Cost Management (PCM) - Management of product costs across the product lifecycle and synchronization of product cost and cost processes with both internal and external participants.
- Agile Engineering Collaboration - Management of CAD design data from the engineer's desktop directly in a central PLM product record, automating both the design and product BOM change processes and supporting IP reuse.
- Agile Enterprise Visualization - Visualization, markup, and analysis of native documents (MS Office, image, drawing, and CAD) through the Web across the extended enterprise, without the need for the original authoring tool or conversion to a neutral format.

## What is Product Cost Management

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

It addresses the requirements across a multi-tiered network of materials and resources consumed in the delivery of the product to the customer, and it allows key people

within sales/marketing, procurement, operations, engineering, and trading partners to collaborate on product design decisions.

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

- Commodity and Supplier Leveraging
- Co-Sourcing and Reprice Management
- Design for Total Cost and Margins
- New Business Acquisition

For examples of PCM use cases, see "[PCM Use Cases](#)" on page A-1.

## Commodity and Supplier Leveraging

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

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

## Co-Sourcing and Reprice Management

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

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

## Design for Cost and Supply

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

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

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

## New Business Acquisition

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

## Agile Client Applications

Oracle Agile PLM provides two clients:

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

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

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

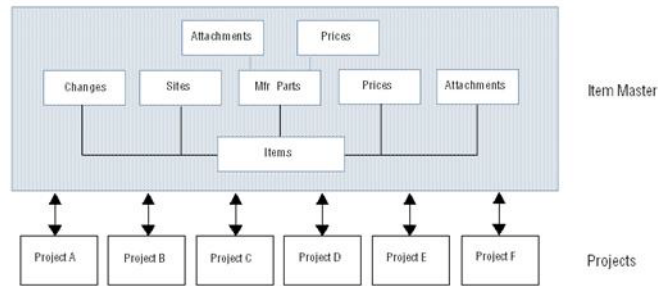
## Licenses

To set up licenses, the Agile administrator uses the Java Client to turn on licenses for the PLM solutions that your company has purchased. Once the PCM license is turned on, PCM-specific classes, such as Sourcing Projects, and other solution-based functions that pertain to your company's business will be enabled. For more information about licenses, see *Agile PLM Administrator Guide*.

## Item Master and Sourcing Projects

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

The Item Master figures prominently in Agile PCM. Most data that you bring into a Sourcing Project comes from the Item Master, as shown in the figure below. You can also create new project items or import them from external data files.



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

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

You can selectively import BOM Items using filters. For more information about publishing Items and Manufacturer Parts to the Item Master, see ["Publishing Items and Manufacturer Parts"](#) on page 4-9.

After negotiating prices with your suppliers, you can publish them to the Item Master. For more information about publishing prices, see ["Publishing Prices for Items and Manufacturer Parts"](#) on page 5-21.

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

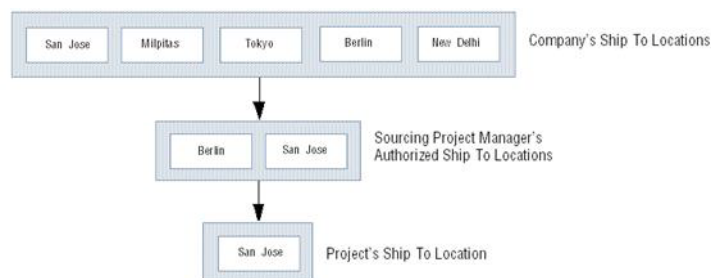
## Understanding Ship To Locations

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

- The Agile administrator defines system-wide Ship To locations in the Agile Java Client. For more information, see ["Ship To Location"](#) on page B-2.
- Sourcing Project managers must have at least one authorized Ship To location defined in their user profile. Otherwise, they will not be able to specify a Ship To location for Sourcing Projects.
- Each Sourcing Project must have a specific Ship To location. Without a Ship To location, project status cannot be changed from Draft to Open.
- When sourcing managers send RFQs to Suppliers, they can choose to disseminate the RFQs only to the Suppliers with manufacturer or commodity offerings that match the desired parts, ratings, and Ship To location.

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





## Searching Agile Objects

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

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

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

## Working with Customers, Suppliers, and Partners

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

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

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

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

## Top PCM User Tasks

In PCM, there are many activities that take place during the sourcing process. From creating suppliers to creating sourcing projects and RFQs to publishing prices, some of the top tasks that PCM users must complete include the following:

- Working with Sourcing Projects
  - To create a sourcing project, see ["Creating a New Sourcing Project"](#) on page 2-2.

- To add items to a sourcing project, see ["Adding Items to a Project"](#) on page 2-15.
- Creating RFQs
  - To create RFQs from a sourcing project, see ["Creating Request for Quote"](#) on page 6-7.
  - To request information from the suppliers, see ["Creating Request for Quote"](#) on page 6-7.
- Working with RFQs
  - To change the status of an RFQ to Open, see ["Changing the RFQ Status"](#) on page 6-16.
  - To share an RFQ, see ["Sharing an RFQ With Other Users"](#) on page 6-23.
  - To open an RFQ to suppliers, see ["Sending RFQs by Changing the Status"](#) on page 6-14.
  - To lock the responses in the Responses tab, see ["Editing Responses"](#) on page 6-21.
  - To request a requote, see ["Requesting Requotes"](#) on page 6-22.
- Analyzing Prices in a Sourcing Project
  - To set best responses for item response lines, see ["Setting the Best Response for an Item"](#) on page 5-15.
  - To view a Costed BOM comparison, see ["Viewing Costed BOM Comparisons"](#) on page 5-4.
- Managing Prices
  - To create prices, see ["Creating Prices"](#) on page 9-5..
  - To add price lines, see ["Creating Price Lines"](#) on page 9-8.
  - To release prices through a PCO, see ["Redlining Price Information"](#) on page 10-5.
- Managing Suppliers
  - To create suppliers, see ["Creating a Supplier"](#) on page 7-7.
  - To assign line cards, see ["Defining Manufacturer and Commodity Offerings"](#) on page 7-12..
- Managing Commodities
  - To create commodity objects, see ["Creating Commodities"](#) on page 7-4.
  - To add items to a commodity, see ["Associating Items with Commodities"](#) on page 7-6.
- Using Java Client for PCM administrative tasks
  - To map attributes between Product Collaboration and PCM, see ["Pulling Data from Item Master Flex Fields into Sourcing Projects"](#) on page B-8.
  - To set up RFQ Terms & Conditions, see ["RFQ Terms and Conditions"](#) on page B-3.

## What's New in PCM

The following sections list PCM new features by the product release in which they were introduced.

### New features in PCM 9.3.3

New features in Agile PCM Release 9.3.3 include the following:

- You can now update the Quantity Per Assembly (QPA) for an item in a sourcing project. You can also update the QPA field with data from the Item Master, as well as publish the QPA back to the Item Master when publishing the items. For more information see, ["Editing Quantity Per Assembly \(QPA\)"](#) on page 3-4.
- QPA can be edited in PCM via Import, SDK, and Web Services. See relevant documentation for more information.

Some new, general PLM features that affect PCM include the following:

- Several new list fields have been added to Page Two for only the Item object (Parts and Documents). Although these fields are not directly related to PCM, just like other P2 fields, they can be mapped to sourcing project attributes. For more information, see the *Agile PLM Administration Guide*.

### New features in PCM 9.3.2

New features in Agile PCM Release 9.3.2 include the following:

- You can now restrict suppliers from proposing alternates in an RFQ, by unchecking the Propose Alternates option in the RFQ's Data to Share options. See ["Selecting Data to Share with Suppliers"](#) on page 2-17. for more information.

Some new, general PLM features that affect PCM include the following:

- Additions have been made to routable object workflows, such as PCOs in PCM, to allow for greater efficiency when a user changes job functions. A new global list, Job Function, was created so that job functions, users, and user groups can be linked together to form functional teams. The functional team attribute was added to the following PCM-related objects:
  - Prices (General Information tab)
  - PCO (Cover Page tab)
  - Part Group (General Info tab)

Read and modify privileges for Prices, PCOs, and Part Groups now have the Functional Team(s) attribute. Functional teams that have been added in the Prices Cover page will be pulled into the PCO > Affected Prices tab as a read-through field. Functional teams can also be added to the PCO manually. Note that the Functional Team attribute is a read only field on an Item's Prices tab, Manufacturer Part's Prices tab, and PCO's Affected Prices tab. For more information about these workflow changes, see the *Getting Started with Agile PLM*.

- Also, in addition to approvers and observers, a new group of reviewers called acknowledgers, have been added to workflows. For the PCO workflow, acknowledgers need the Acknowledge PCOs privilege or the (Restricted) Acknowledge PCOs privilege for suppliers. Acknowledgers need to confirm that they performed what was expected of them when the object (PCO in PCM) was routed in the Price Review and Release status criteria. It is not an approval, but is required. For more information about these and other related changes, see *Getting Started with Agile PLM*.

- Audit windows now contain hyperlinks to unresolved issues, where the errors are highlighted, so that a user can correct errors more easily to pass the audit. In PCM, you can get audit warnings if:
  - there are manufacturer redlines that will be lost after the routable object is released.
  - there are conflicts due to another routable object being released first.
  - the DuplicateFindNumbers SmartRule is set to Warning or Disallow and there are duplicate numbers caused by a change release.
  - the DuplicateRefDes SmartRule is set to Warning or Disallow and there are duplicate reference designators caused by a change release.
  - the Item Release First SmartRule is set to Warning or Disallow and there are unreleased children.

There are additional circumstances that prompt audit warnings in PCM and elsewhere in PLM. To learn more about the audit warnings and how to resolve the issues, see *Getting Started with Agile PLM*.

## New features in PCM 9.3.1

New features in Agile PCM Release 9.3.1 include the following:

- Supplier users can now be authenticated through an LDAP server. For more information, see the *Agile PLM Administrator Guide*.
- The BOM filtering feature now allows filtering on fields other than BOM flex fields and BOM Quantity. All enabled cover page, P2, and BOM tab fields are available for filtering. See ["BOM Filtering"](#) on page 2-10 for details.
- All standard and flex fields are now bulk editable on the Analysis tab. See ["Bulk Editing"](#) on page 4-2 for details.
- Several features that were previously only available on the Items tab or the AML tab are now also available on the Analysis tab. For example, you can now add items to a sourcing project from the Analysis tab. See *Completing Non-Analysis Tasks on the Analysis Tab* for details.
- You can publish rolled up material costs for an assembly. See *Publishing Rolled Up Material Costs for an Assembly* for details.
- Multi-column sorting and filtering is available on Project-Analysis tab. *Configuring Project Tabs* on page 24 for details.
- Multi-column filtering is available on the RFQ-Responses tab and the RFQ Response-Responses tab.
- Using SDK, you can now export PCM data into a spreadsheet, apply your own price models, recalculate the costs using your own formulas and data from external sources, and finally import the recalculated costs back into PCM. Two new IProject APIs are available through web services to support this new price model feature. For more information, see the *SDK Developer Guide*.
- All dates related to prices are now in DateOnly format in GMT. Project periods, RFQ due dates, price line effective from/to dates, valid from, and valid until dates are all now in DateOnly format.
- A new configurable attribute is available on the RFQ Response Entry form to allow you to explicitly set a start date for prices that have quantity breaks. The new attribute, Valid From, has a default of the current date.

- Table Edit mode for editing response lines is unavailable.

Some new, general PLM features that affect PCM include the following:

- You now have the ability to choose which tabs you see with the "Manage Tab Display" privilege. See *Getting Started with Agile PLM* for details.
- Your Agile administrator now has the ability to configure a status in a workflow so that no password is required for approval or rejection. For PCM, this means that you may not need to enter your password in the approval/rejection window for a PCO. For more general information, see the *Agile PLM Administrator Guide*.
- There are a few new search features that affect PCM:
  - You can now access the advanced search palette from within the quick search window when you attempt to add objects to a table by search. You can also use saved searches to populate the advanced search palette. Once you have the results you need in the advanced search palette, you can directly add the objects to the table by drag and drop, etc. For more information about how this affects your ability to add items to a table, see ["Adding Items to a Project"](#) on page 2-15
  - When filling in list or multi-list fields, in addition to being able to either type in values or use the quick search, you can now use saved searches. A saved search button appears on the quick search palette. The saved search feature is available for all list and multi-list fields in cover pages, tabs, action dialogs, and wizards.
  - The ability to use advanced searches is now available when running reports that have a step in their wizard that requires you to add items or another object to a table. For example, in PCM, the Effective Cost Comparison report wizard requires that you add items or manufacturer parts to be analyzed in the report to a table. You can click the "Custom Search" button to launch the advanced search palette. Saved searches are also accessible from within the advanced search palette. You can add objects directly from the advanced search palette to the table.
  - Custom search is now also available during the export process scenarios, as well.

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**Note:** For detailed information about any of the new search features, see *Getting Started with Agile PLM*.

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## New features in PCM 9.3

Several new UI enhancements in Agile PLM help make the PCM experience more efficient and beneficial. Additionally, event functionality is now available to help automate certain actions. The following sections provide an overview of PCM-specific enhancements. For details about general UI enhancements that affect all Agile PLM modules, see *Getting Started with Agile PLM*.

### UI Enhancements

There are several new enhancements and changes to the UI in PCM. The following are some of the general changes:

- You can "drag and drop", or copy and paste, data into Sourcing Projects, PCOs, and Suppliers. For example, you can drag items from your My Bookmarks folder and drop them into the Items table on the Items tab of a sourcing project.

- When filling in list and multi-list fields in a form, you can type ahead values if you already know the value you want to enter. If you do not know the value to enter or if the value you enter displays in red, you can search for the value by clicking the search button.
- When filling in date fields, you can either type in the date manually or click on the calendar button to select a date.
- The Prices, PCO, and Commodity objects support full view personalization.
- The Supplier, Sourcing Project, RFQ, and RFQ Response objects support limited view personalization.

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**Note:** For more information about personalization in PCM, see ["Configuring Project Tabs"](#) on page 2-12.

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For details about view personalization and other general UI enhancements, such as the drag and drop feature, see the *Getting Started with Agile PLM*.

### UI Enhancements for Sourcing Projects

The following are enhancements that affect the Sourcing Project object:

- Some action buttons, and their menu options, have been rearranged and/or renamed in the Items, AML, and Analysis tabs.
- The Personalize button replaces the Configure Display button. The Personalize button launches the personalization palette.
- Multi-column filtering is supported in the AML tab through view personalization. Sorting is not supported.
- Filtering is supported in the Analysis tab through view personalization. Multi-column filtering is not supported. For more details about filtering in Sourcing Projects, see *Filtering Project Data*.
- On the Items tab and the AML tab, editing of Item/Manufacturer Part information is done through the Item/Manufacturer Part quick view palette. To access the quick view palette, click on the number of the Item or Manufacturer Part.
- Changes tab has 3 sub-tabs: Item Master Changes, Project Item Changes, and Supplier Response Changes. The content on the three tabs was previously available as three separate views.
- On the Analysis tab, view options for price details, that were previously accessed through Filter functionality, have been relocated to a View dropdown list.
- On the Analysis tab, the price lookup wizard was redesigned to improve efficiency. See *Looking Up Price Information*.
- When adding items from Product Collaboration to a sourcing project, you can now narrow down your search by item revision.
- Changes in the BOM filter UI and the process. See ["BOM Filtering"](#) on page 2-10
- Changes in the procedure for adding AML to an item in a project. See ["Adding an AML to an Item"](#) on page 4-3

### UI Enhancements in RFQs and RFQ Responses

The following are enhancements that affect the Requests For Quote object:

- Some action buttons, and their menu options, have been rearranged and/or renamed on the Responses tab.
- Filtering is supported in the Responses tab through view personalization. Multi-column filtering is not supported.
- Response Status tab has 2 sub-tabs - Supplier Response Status and Terms & Conditions. The content on the two tabs were previously displayed as tables on the same page.

The following are enhancements that affect the RFQ Response object:

- Some action buttons, and their menu options, have been rearranged and/or renamed on the Responses tab.
- Filtering is supported in the Responses tab through view personalization. Multi-column filtering is not supported.
- When using Advanced Table Edit mode, inline table editing is supported for editable fields.
- The wizard flow diagram in the left pane is no longer displayed. Instead, when using Basic edit mode, the diagram is replaced with a text version of the flow steps. The flow is not displayed while in other edit modes.

### **UI Enhancements in Prices and Price Change Orders**

The following enhancement affects the PCO object:

- On the Workflow tab, the Summary table and the Signoff History table have been combined into one table. Now, the two sections on this tab are the Summary section and the Workflow section, which contains the table.

### **Events in PCM**

In Agile PLM, a preconfigured event is an automation that occurs when a user performs a task that is specified by an event mask. The triggered event then results in an event outcome, such as the delivery of a notification to a user. There is limited event functionality for the PCM solution, however, some events can be configured for PCM objects, including Sourcing Projects. For more details about event functionality in PCM, see ["Managing Events in PCM"](#) on page B-23.





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## Working with Sourcing Projects

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This chapter provides information about working with sourcing project in PCM.

### About Sourcing Projects

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

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**Note:** The object previously known as the PPM Program was renamed as Project object. There is no relation between the PPM Project object and the PCM Sourcing Project. All references to projects in this guide are to PCM Sourcing Projects.

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

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

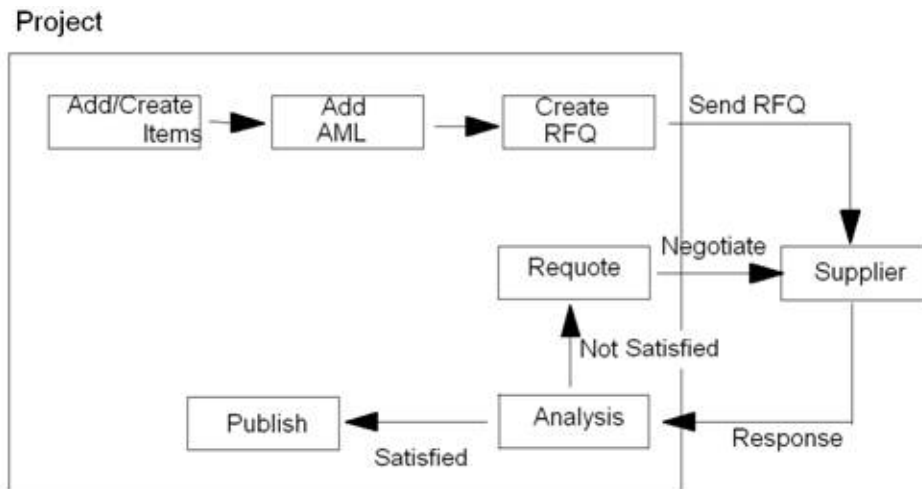
You can create a project from scratch or create a copy of an existing project using the Actions > Save As command. The copied projects will not contain information such as partners, RFQs, supplier responses, and history.

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

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



### Project Lifecycle Phases

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

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**Note:** You must complete the Ship To Location field on the General Information tab before you change the state of the project from Draft to Open.

---

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

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

### Creating a New Sourcing Project

This section describes different methods to create a new sourcing project.

#### Using the Project Creation Dialog

You can create a new project by choosing Create New > Sourcing Projects.

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**Note:** The Project object in the Create New menu is a PPM object. It is not the same as the PCM Sourcing Project object.

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## Creating a Project

1. Click Create New > Sourcing Projects. The *Create New Sourcing Projects* dialog appears.

---

**Note:** The fields in the *Create New Sourcing Projects* dialog that are marked in bold are required fields. Fill in required fields to proceed.

---

2. Select the type from the Type dropdown list.
3. Enter a unique identification number (unique identifier for the project) in the Number field, or click for the system to generate a number based on the Auto Numbering functionality defined for the Project Type.

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**Note:** The number field could also be filled in automatically and may not be editable. Numbering for sourcing projects is dependent on the configuration set up by your Agile administrator.

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**Note:** If your administrator has defined more than one auto-numbering source for Project Types, the Number Generation Button changes to .

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4. Define the price scenarios for the project. Select Quantity Breaks or Effectivity Periods. For more information, see ["Specifying the Price Scenario"](#) on page 2-6.
5. If you selected Quantity Breaks in step 4, select the number of quantity breaks you want from the dropdown list. You can set up to 6 Quantity Breaks per project.
6. If you selected Effectivity Periods in step 4, follow these steps:
  1. Select a number in the Number of Date Periods dropdown list. You can set up to 20 date periods.
  2. Select the period type from the Period Type dropdown list. Available values are Monthly, Quarterly, Semi-Annually, Yearly, and Variable.
  3. If you selected Monthly, Quarterly, Semi-Annually, or Yearly for the Period Type, select the effective start date from the Start Date dropdown list.
  4. If you selected Variable for the Period Type, specify the start and end dates for each period.
  5. Select a number from the Quantity Breaks per Period dropdown list.
  6. Click Save. The General Info tab of the new sourcing project appears.

The specified project is created in the Draft state.

## Entering Sourcing Project Information

Enter general information for a sourcing project from the General Info tab of the project. The following table describes sourcing project fields that are included on the General Info tab.

Field name	Constraint	Description
Number	Read-only	The unique identification number of the project.
Description	Optional	The description about the project.
Lifecycle Phase	Read-only	The current lifecycle phase of the project. The default state is Draft.
Program	Optional	The program to which the project applies. For example, you can define your programs and information needed for a specific program. You can select the program for which the project is being created from the dropdown list. If this field is blank, the project information applies to all the programs.
Customer	Optional	Customer to whom the project applies. You can select the customer by clicking the button next to this field and running a search. If this field is blank, the project information applies to all the customers.
Manufacturing Site	Optional	<p>The site where the project will be handled. You can select the site from the dropdown list.</p> <p>Select a site only if the project is site-specific. If it is, when adding an assembly from PC, only the bill of material (BOM) belonging to the specific site is added to the project; the rest of the items are ignored. For example, if a project is specific to "San Jose" and if you add an assembly which has a BOM from "San Jose", "Milpitas", and "global", only the BOM for San Jose is added to the project. It will not add the global/common BOM or Milpitas BOM.</p>
Ship To Location	Required (for RFQ creation)	<p>The location to which the items in the project are to be shipped. You must specify the location to move the project into the Open lifecycle phase.</p> <p>The list of Ship To locations is determined by the setting for the Authorized Ship To property in your user profile. If your user profile does not specify any authorized Ship To locations, you won't be able to select a value for this field.</p>
Project Currency	Required	<p>You can select the currency from the dropdown list.</p> <p>The project currency determines how other currency values (for example, price quotes entered by suppliers in an RFQ response) are normalized based on the system's currency exchange rate table. The default currency depends on the currency of the current user.</p>
Product Lines	Optional	The product line(s) the project is associated with.
Number of Periods	Read-only	Number of effectivity periods.
Number of Qty Breaks	Read-only	The number of quantity breaks in the project.

Field name	Constraint	Description
Data to Share	Optional	The data to share with the suppliers in all RFQs generated from the sourcing project. You can select the fields to expose to the supplier in the RFQ in the Data to Share with Suppliers window by clicking the button next to the Data to Share field. The Data to Share settings at the sourcing project level can be overridden at the RFQ level.
Response Required Fields	Optional	The response information required from the suppliers for all RFQs generated from the sourcing project. You can select the required fields from the Response Data Requirements window by clicking the button next to the Response Required Fields field. The Response Required Fields settings at the sourcing project level can be overridden at the RFQ level.
Supplier Instructions	Optional	Instructions that are communicated to suppliers via RFQs created from the project.
Owner	Required	The owner responsible for the project. Only the owner can create RFQs from the project. You can select the owner by clicking the button next to the Owner field.
Creator	Read-only	The creator of the project.
Created Date	Read-only	The date when the project was created.
Last Modified	Read-only	The date when the project information was last modified.
Project Type	Read-only	The type of the project. It is Sourcing Project by default.
Authorized Users	Optional	Users authorized to work with this project. You can select the authorized users by clicking the button next to the Authorized Users field.
Disallow AML Statuses	Optional	Specifies AML statuses for parts that you don't want brought into the project. Use this field to automatically filter out manufacturer parts that are not preferred, discontinued, or are disqualified for some other reason.

---

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

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To enter data into a sourcing project:

1. Open the sourcing project.
2. Click the Edit button on the General Info tab.
3. Modify fields, as needed.
4. Click Save.

### Adding Items to the Project

Once you have created a project, you can add items to a project in several ways. See ["Adding Items to a Project"](#) on page 2-15 for more details.

### Adding Attachments to the Project

1. Open a sourcing project and click on the Attachments tab.
2. Click Add > Add Files or Add > Add URLs or click Add > By Search to search for file folders.

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**Note:** For more information about adding an attachment, see *Getting Started with Agile PLM*.

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### Quick Step from an Item

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

1. Open an item.
2. Click Actions > Create New > Sourcing Project.
3. Select the *Sourcing Project Type*.
4. Enter Number.
5. Enter the Price Scenarios (either quantity breaks or effectivity periods).
6. Select the Manufacturing Site location from the dropdown list.

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**Note:** The Manufacturing Site field and the Disallow AML Statuses field (from the next step) only appear if they have been enabled by the Agile administrator.

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7. Select any AML status in the Disallow AML Statuses field that you want to exclude. An AML with the selected status will not be added from PC into the sourcing project.
8. Click Save.

### Specifying the Price Scenario

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

- Specify Quantity Breaks to capture prices based solely on quantities. You can determine how the cost of products might change based on different quantity scenarios. When you select the Quantity Breaks price scenario, you can capture prices for up to six quantity breaks. Although the system automatically generates a start date for this type of price, you can choose to specifically set the Valid From and Valid Until date fields on the RFQ Response entry form. See ["Response Entry Form"](#) on page 6-21
- Specify Effectivity Periods to capture prices based on future dates, which helps you assess the cost of products for future time periods. The Effectivity Periods scenario also supports quantity breaks per period, which allows you to create a combination of period and quantity scenarios. When you select the Effectivity

Periods price scenario, you can capture prices for up to 20 price periods, and potentially six quantity breaks per period.

### Quantity Break Example

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

Quantity breaks	Selected quantity breaks
500	X
200	X
100	X

### Effectivity Period Examples

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

Quantity breaks	01/01/09 to 03/31/09	04/01/09 to 06/30/09	07/01/09 to 09/30/09	10/01/09 to 12/31/09
500	This cell is blank.	This cell is blank.	X	This cell is blank.
350	This cell is blank.	This cell is blank.	This cell is blank.	X
200	This cell is blank.	X	This cell is blank.	This cell is blank.
100	X	This cell is blank.	This cell is blank.	This cell is blank.

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

Quantity breaks	01/01/09 to 03/31/09	04/01/09 to 06/30/09	07/01/09 to 09/30/09	10/01/09 to 12/31/09
500	This cell is blank.	This cell is blank.	X	X
350	This cell is blank.	X	X	X
200	X	X	This cell is blank.	This cell is blank.
100	X	This cell is blank.	This cell is blank.	This cell is blank.

## Dates for Price Periods

Agile PCM uses no fixed calendar for its dates, so technically all price periods that you specify can have any start and end date. All dates related to prices are in DateOnly format in GMT.

When you create a new project, the Sourcing Projects Creation dialog allows you to specify up to 20 price periods. However, there is no actual limit to the number of price periods in a project. If you open a project and choose Actions > Modify Price Scenarios, you can add more than 20 periods.

---

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

---

If you delete a price period, the period and any price information associated with it are removed. If the Auto Publish Quote History SmartRule is set to "Allow," the system automatically creates quote histories when you delete a price period from a sourcing project, if and only if, the sourcing project has an RFQ associated to it. For more information about SmartRules, see *Agile PLM Administrator Guide*.

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

When you modify price scenarios, you can delete price periods or add new price periods before or after the existing range of price periods. For more information, see ["Modifying Price Scenarios"](#) on page 2-20.

## Creating a Project Using Save As

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

If you want to reuse cover page information such as, Effective Periods, Data to Share, Response Required Fields, Supplier Instructions, etc., for all of your sourcing projects, you can create a sourcing project that has those fields set to specific values and use the project as a template. Every time you want to create a new sourcing project, you can do a save-as on the template project so that the new project automatically inherits all the cover page information and attachments.

To save a copy of a project:

1. Open the project you want to use as the basis for a new project.
2. Select Actions > Save As. The *Save As* dialog appears.
3. Select the Type of sourcing project from the dropdown list.
4. The next available number appears in the Number field. You can click to generate the next project number, or enter the project number.

---

**Note:** AutoNumber functionality is controlled at the subclass level in Java Client and may have been changed by your Agile PLM administrator.

---

5. Click Save.
6. Click Edit to modify the general project information. Click each tab in the project to verify and edit the information, as needed.

---

**Note:** You can modify the price scenarios of projects, which use Effectivity Periods and are created using the Actions > Save As feature. For more information, see ["Modifying Price Scenarios"](#) on page 2-20

---



## Sharing a Project with Other Users

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

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

---

---

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

---

---

To share project:

1. Open the project.
2. Choose Actions > Sharing. The *Share With Users* dialog appears.
3. Click Add. The *Add Users* dialog appears.
4. Click the button to the right of the Users field. The *Users* search palette appears.
5. Use the dropdown filter in the Users search palette to select all users (Users) or all groups (Groups) or any other specific groups.

Enter your search criteria and click Search. You may also type a user's name if you know exactly how it appears (in the system), but you must select a group first to populate the Available Users list.

6. Select the users one by one or select multiple users/user groups using the Ctrl button on your keyboard. Drag and drop your selected item(s) to the Users cell.
7. Click the button to the right of the Roles field. The *Roles* palette appears. Select the appropriate role or roles for your chosen users to have available in relation to the project. Drag and drop them into the Roles cell.
8. Click Save. Your additions are listed in the *Share With Users* window.
9. Click Close.

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

---

---

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

---

---

1. Open the project.
2. Choose Actions > Sharing. The *Access Control List: Share With Users* dialog appears.
3. Click the rows of users to remove.
4. Click Remove.

To see which objects have been shared with you:

1. Click the My Settings button in the Courtesy Controls area in the left pane.
2. Click the Share tab.

The Share tab lists the objects that have been shared with you by another user.

3. From your user profile, see if any objects have been shared with you via user groups.
4. Click the User Group tab.
5. Click a desired group.
6. Click on its Share tab.

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

## BOM Filtering

The BOM filtering feature allows you to set up filters to selectively add components in BOM structures. You can filter components based on any enabled attributes from the cover page, P2, and BOM tabs of the Item object. Note that since the Parts and Documents classes are based on the Items base class, the Parts and Documents cover page fields are also available for filtering.

---

---

**Note:** P3 fields, Document-P2 fields, as well as all read through fields, are unavailable for filtering.

---

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---

**Note:** Part-P2 fields are available for filtering.

---

---

To use BOM filtering, you must first enable and configure BOM filters via the Java Client Admin tab. For procedural steps to set up the BOM filters, see "[Configuring BOM Filters](#)" on page B-21.

BOM filters are inherited by top-level assemblies when the assemblies are added into a sourcing project from PC Item Master. Alternatively, when adding an assembly to a sourcing project, a BOM filter can be set up for that assembly, which overrides the inherited filter.

Content update uses the same filter settings that you use during the item additions. These filter settings display in the sourcing project Item table. You can update the project filters even after you add the items.

---

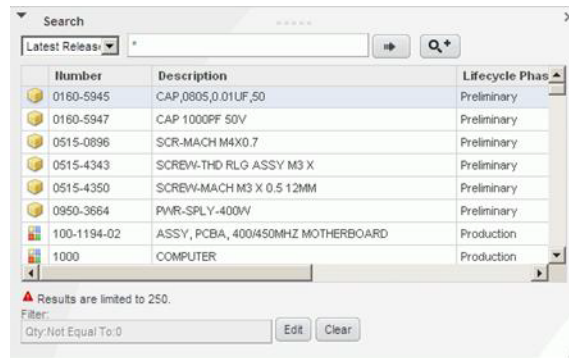
---

**Note:** The settings affect only the future item additions and have no impact on the added items.

---

---

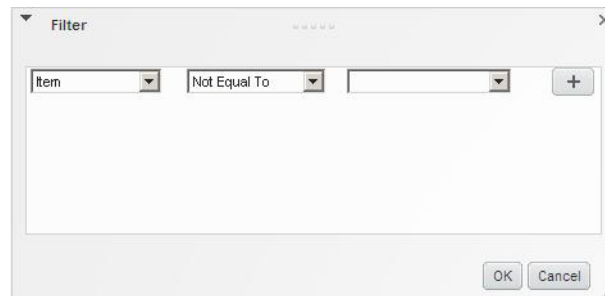
The BOM filter is updated through a special dialog that is similar to the controls of the general filter functionality. When adding items by search, you have access to BOM filtering from within the search palette, as shown below.



If you have BOM filters enabled and you try to add items using copy/paste or drag/drop, the BOM *Item Filter* pops up.



When you click the Edit button from within the search palette or the BOM *Item Filter* pop up window, the BOM filter window appears, as shown below.



## Adding BOM Components with Filters

You can set up filters to selectively add BOM components when you add items to a sourcing project.

To use BOM filters:

1. Attempt to add an item to a project by search, drag and drop, etc.
2. If enabled, the BOM Filter field appears when you attempt to add existing items to a sourcing project. Go to ["BOM Filtering"](#) on page 2-10 to see how the BOM filter appears in the UI.

---

**Note:** Your administrator must have enabled this field in the Java Client in order for it to appear when you add items by drag and drop or for it to be visible in the search palette (if you add by search).

---

3. Apply BOM filters during the item addition process.
4. After an item addition, the filter is associated with the item.
5. Content Update uses the filter settings that are used during the item addition.
6. BOM filter setting will be defaulted to the filter setting of the last import.

7. Alternate filters can be applied to each new item added to a single sourcing project.

## BOM Filter Examples

The following are examples of BOM filter usage.

### Example 1: No Filter Applied

When you add items from PC to a sourcing project, duplicate items are not added. Only one instance of an item is retained.

### Example 2: Apply a BOM Filter to exclude unwanted components

Assume that the assembly belongs to several product lines. If you are interested in components of only a specific product line, you can set up the filter criteria in the BOM filter to be *Product Line = 'X'*. As a result, only components of that product line will be added to the sourcing project.

Take the following assembly structure as an example.

Number	QPA
A1	1
P2	1
P3	0
P4	3

Assume, for example, that your organization uses a QPA of 0 to indicate unwanted parts or items. When adding this assembly, you could use the BOM filter to only add items with "QPA not equal to 0". In that case, everything except P3 is added, which had a QPA of 0 indicating that it is unusable.

## Configuring Project Tabs

On some tabs of PCM objects, you can select which fields to view (and how to view them) to obtain better performance and to meet your specific needs. The default view appears when you open the tab after login. Use the Personalize button, which brings up the *Table Personalization* palette to reconfigure the tab display.

---

---

**Note:** Although the Personalize button is available for other PCM objects, this section focuses on Sourcing Projects since it is the object that buyers most frequently use.

---

---

From the *Table Personalization* palette, depending on the tab that you are on, you *may* be able to:

- Sort table results by up to three attributes.

For example, on the *Discussions* tab, you can sort discussions by the Create Date field in ascending or descending order. You can further sort the results by discussion Subject in ascending or descending order.

---

**Note:** On the Analysis tab, primary sorting is done on the item number. You can further sort the rows according to manufacturer part fields (e.g. MPN #), AML fields (e.g. AML status), and manufacturer part response fields (e.g. transportation terms). You can not sort by item or item-level fields. You can only sort AML rows within the context of the parent IPN.

---

- *Filter* the information based on specified criteria.

For example, on the *AML* tab, you may want to view only the manufacturer parts that have a preferred status. To accomplish this, you can set your filter criteria to be "AML Status In Preferred". For details on how to filter table rows, see ["Filtering Project Data"](#) on page 2-14.

- *Format* /select the fields (columns) that appear on the tab and set the order of the fields

For example, on the *Attachments* tab, if the Modified Date field is not visible, you can make it visible, as well as change the location of the column to make it easier to find. For example, you could make the Modified Date the third column in the Attachments table by changing the order in which it appears.

You can also lock a particular column to ensure that it is always visible as you use the horizontal scroll bar. For example, you can lock the Number column so that it is always visible as you scroll to view other data to the right of the column.

The following table shows the personalization features that are available for each Sourcing Project tab.

Tab Name	Sort	Filter	Format	Properties
Items	X	X	This cell is blank.	This cell is blank.
AML	X	X	X	This cell is blank.
Changes	X	X	This cell is blank.	This cell is blank.
(All sub-tabs)				
Analysis	X	X	X	X
RFQs	X	X	This cell is blank.	This cell is blank.
Discussions	X	X	X	X
Relationships	X	X	X	X
Attachments	X	X	X	X
History	X	X	X	This cell is blank.

---

**Note:** In addition to being able to personalize the data you see on a particular tab, you can also personalize which tabs you see for an entire object. You must have the "Manage Tab Display" privilege in order to do this. See *Getting Started with Agile PLM* for more details.

---

## Configuring the Display of a Project Tab

To configure the display of a Sourcing Project tab

1. Open a project and select one of the configurable tabs.

2. Click Personalize. The *Table Personalization* palette appears.
  - To sort fields: On the *Sort* tab, you can select up to three fields by which the table rows should be sorted. For each field, choose whether the sort should be done in ascending or descending order.
  - To filter data: See ["Filtering Project Data"](#) on page 2-14.
  - To format fields: On the *Format* tab, select the fields that you want to view on the tab from the Hidden Fields list. Click to move fields into the Displayed Fields list. Use the up/down arrows to change the order of appearance of the columns.
  - To lock a field (column): To lock a field in the Displayed Fields list, go to the *Format* tab, select the column, and click the lock icon.

---

---

**Note:** If the selected field/column is not the first column in the table, all columns to the left of the selected column are also locked as you use the horizontal scroll bar.

---

---

3. Click Apply to apply the new display.

---

---

**Note:** Once you click Apply, only the current view is affected. Once you go away from the current page, the applied view will be lost unless you save the view. When you make a change to the base view or a pre-defined view, you must click Save and then Save As to save the view as a new view. Later on, if you make changes to a view that was not pre-defined, you only have to click Save and the changes are saved to the existing view.

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

---

---

For more information about configuring your display using the Personalize button, see *Getting Started with Agile PLM*.

## Filtering Project Data

The filter tool allows you to filter the rows of a table that is on an object tab, such as the table on the Items tab of a Sourcing Project object. This feature is not available on all tabs. Filtering is only available on the AML, Analysis, History, Attachments, and Discussion tabs of sourcing projects.

The Personalize button appears on most tabs and allows you to sort and format table content, as well as filter table content. Use the filter tab on the Table Personalization palette to display only the table rows you need.

To filter data on a tab:

1. Open the sourcing project and click on the desired tab.
2. Click Personalize. The *Table Personalization* palette appears.
3. Click the Filter tab.
4. Click the *Field* dropdown list to select a field by which to filter.

5. Click the *Operator* dropdown list to select a relational operator for the filter. The list of relational operators varies based on the type of attribute selected.
6. Select a value for the filter criteria.
  - For text attributes, type a value.
  - For list attributes, click to select a single or multiple values from available values list.
7. To add additional filters, click the button.

---

**Note:** Multi-column filtering is not available on all tabs.

---

8. Click Apply.

---

**Note:** If you want to save this filter for future use, click Save. You must then click Save As to save the settings as a new filter.

---

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

Only Text, Numeric, List, and Money fields are filterable. Date, Multi-list, and Multi-text fields are not filterable.

For complete information about the table personalization features, see *Getting Started with Agile PLM*.

## Adding Items to a Project

You can add items to a project while on the Items tab or while on the Analysis tab. You can add them using one or more of the following methods:

- Search and add items from the Item Master.
- Drag items from your *Bookmarks* folder, *Recently Visited* folder, *Navigator Drawer*, or search (advanced or quick) window and drop them into the table on the tab.
- Copy items from your *Bookmarks* folder, *Recently Visited* folder, *Navigator Drawer*, or search window and paste them into the table on the tab.
- Import items from an external document, such as an Excel Workbook or a text file. See ["Importing Item Data from a Spreadsheet"](#) on page 2-17.
- Create new items. For more information, see ["Creating Items to Add to a Project"](#) on page 2-17.

---

**Note:** You cannot create a BOM in a sourcing project.

---



---

**Note:** The newly created items are not automatically added to the Item Master. You can publish content by using the publish feature on the AML or Analysis tabs.

---



---

**Note:** If BOM filtering is enabled, the BOM filter appears when you attempt to add items by search, drag and drop, or copy/paste.

---

To add existing items to a project:

1. Open a sourcing project and select the Items or Analysis tab.
2. Click Add > Search for Items.
3. Search for existing items. You can use either the quick search or custom search.
  - Quick search: Enter your search criteria and click to do a quick search. Select the *revision state* from the dropdown to narrow your search
  - Custom search: Click to do a custom search. The custom search option launches the advanced search palette.

---

**Note:** From within the advanced search palette, you can also click to launch a palette that lists any saved searches that return objects of the same base class that is selected in the search criteria in the advanced search palette window. When you click on the name of a saved search, the results appear in the advanced search palette.

---

4. Once you have selected the row(s) you want to add, use your mouse to drag and drop them in the table. You can also double-click individual items to add them or select multiple rows and press Enter.

---

**Note:** You can also add items to a project by dragging items from the *Bookmarks* or *Recently Visited* folders or from the *Navigator Drawer* and dropping the items directly into the Items table. You can also copy and paste objects into the Items table. For general information about these shortcuts, as well as more details about searching for objects in Agile PLM, see *Getting Started with Agile PLM*.

---

---

**Note:** If there are any duplicate components in the selected items, the QPA (Quantity Per Assembly) attribute of the duplicated components are automatically added together and the duplicate components are represented as a single item in the sourcing project. This automatic aggregation occurs only when the DuplicateItemNumbers SmartRule is set to Allow or Warning. If the SmartRule is set to Disallow, and duplicates are selected, PCM does not aggregate the QPAs, but instead selects the QPA of the first BOM entry that is encountered.

---

## Adding Items with Filters

When adding items from PC to a sourcing project, if BOM filtering is enabled, you can use BOM filters to filter out unwanted items.

To use BOM filters with the Add Project Items dialog:

1. Open the Sourcing Project and click the Items tab.
2. Click Add > Search for Items. The *Search* palette appears.
3. Click Edit next to the Filter field, which is located at the bottom of the *Search* palette. The BOM *Filter* palette appears.
4. Select a field and an operator from the corresponding dropdown lists.
5. Enter a value.



---

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

---

6. Click to add more filter criteria.
7. Click OK. The BOM Filter appears in the Filter field in the page.

## Importing Item Data from a Spreadsheet

You can import item data into a sourcing project.

For complete details on the import process, see *Agile Import/Export Guide*.

## Creating Items to Add to a Project

You can create items in the project in the *Create Item* dialog. Items created in this dialog are not published to the Item Master automatically. However, you can publish them later. For more details about publishing items, see "[Publishing Items and Manufacturer Parts](#)" on page 4-9.

---

**Note:** You cannot add child items to an item created in a sourcing project until the item has been published to the Item Master.

---

To create new items:

See "[Creating New Items in a Project](#)" on page 3-2.

## Selecting Data to Share with Suppliers

You can decide on the data about the project that you want to share with suppliers. You can restrict the information available to a supplier in an RFQ.

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

The types of data to share include:

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

---

**Note:** You can modify these fields at a later time by editing the information in the sourcing project's General Information tab. Changes in the Data To Share attribute is reflected in all new RFQs created in the future from the project. You can also modify this attribute in the RFQ's CoverPage tab (to apply changes to only an RFQ).

---

Partners and suppliers can view the BOM structure only if the Content BOM View is shared with them. Partners can only see the Costed BOM, if the Costed BOM View is shared with them. These options provide partners and suppliers with more information before they submit their responses. Also note that suppliers can only

propose alternate parts if the Propose Alternates option is selected, which it is by default.

To select data to share with suppliers:

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

---

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

---

5. Click Apply.

## Requesting and Requiring Data from Suppliers

You can require suppliers to submit specific data that you have requested via an RFQ. The *Response Required Fields* palette allows you to request certain data and make some (if not all) of the requested data required. Lead Time and Inventory Available are a couple of the data items that you may require from a supplier.

---

**Note:** You can modify these fields at a later time by editing the information in the sourcing project's General Information tab. Changes in the Response Required Fields attribute are reflected in all new RFQs created in the future from the project. You can also modify this attribute in the RFQ's CoverPage tab (to apply changes to only an RFQ).

---

To select data to request and require from suppliers:

1. Open a project and go to General Information tab.
2. Click Edit.
3. Click next to the Response Required Field field. The *Response Required Fields* dialog appears.
4. Select the checkboxes next to the fields that you want to make Requested or Required.

---

**Note:** To be selected as Required, a field must also be marked as Requested. The system automatically marks the Requested checkbox, if not already checked, for any field that you mark as Required.

---

5. Click Apply.

## Updating Project Content from the Item Master

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

---

---

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

---

---

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

- BOM - Updates the BOM structure (additions or deletions), quantity requirement per assembly, and part revisions.
- AML - Maintains AML attributes you changed, or resets all attributes to Item Master values.
- Item attributes - Updates by selected attributes, including description, commodity, unit of measure, standard cost, custom part, and any flex fields that appear.
- Manufacturer part attributes - Updates descriptions and any flex fields that appear.

---

---

**Note:** Target cost is not present in Item Attributes in Content Update pop up. To update Target Cost, the user must opt for updating all objects. This is the only item attribute that you cannot update selectively. You can also choose to synchronize the AML with the Item Master.

---

---

To update project content:

1. Open a project and go to Items or Analysis tab.
2. Choose Edit > Update From Item Master. A caution message appears.
3. Click OK to update the content. The *Update Content from Item Master* dialog appears.
4. Select the All Content radio button to update all the objects associated in the project, or select the Selected Content radio button and select the attributes manually.
5. Regarding the Approved Manufacturer List, choose whether you want to update the sourcing project with AML information (Maintain AML changes made in Sourcing Project) or update the AML with the latest Item Master content (Synchronized AML with Item Master).
6. If you chose to update only "Selected Content", then you must also select the Item Part Attributes and Manufacturer Part Attributes that you want updated.
7. Click Update. The update is applied.
8. To view the update, click the Project Item Changes sub-tab on the Changes tab.

## Modifying Price Scenarios

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

---

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

---

To modify price periods:

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

The screenshot shows a web browser window with the URL <http://blueoneupk.qa.agilesoft.com:7777>. The page title is "Modify Price Periods" and the subtitle is "Sourcing Project • Project 1000". A blue information bar at the top states: "The Current Price Period will display as the default in Analysis and Response views. If you set a price period as required, then suppliers will not be able to submit response without entering information for that period. Help Link". Below this, the "Current Price Period" is displayed as "Price Period: 05/31/2005 To 06/29/2005 QuantityBreak1". Underneath, the "All Price Periods" section contains a table:

Start Date	End Date	Response Required	
06/01/2005	06/30/2005	<input checked="" type="checkbox"/>	-
07/01/2005	07/31/2005	<input checked="" type="checkbox"/>	-
08/01/2005	08/31/2005	<input checked="" type="checkbox"/>	- +

---

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

---

1. To delete a price period, click the Delete Row button to the right of a period's end date.
2. To insert a new price period, click the Insert Row button to the right of the last period's end date. Although the period is added after the last period in the project, you can specify any start date or end date.

---

**Note:** If you delete a price period, it is automatically deleted from the corresponding RFQ, as well. If you add a price period, you have to manually add it to the RFQ, if needed.

---

3. To make a price scenario required for supplier response check the Response Required box. By leaving the Response Required check box blank, users are providing the supplier the freedom to respond or not respond to the specified price scenario(s).

---

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

---

4. Click OK to confirm the changes.

## Quickstep to Costed BOM

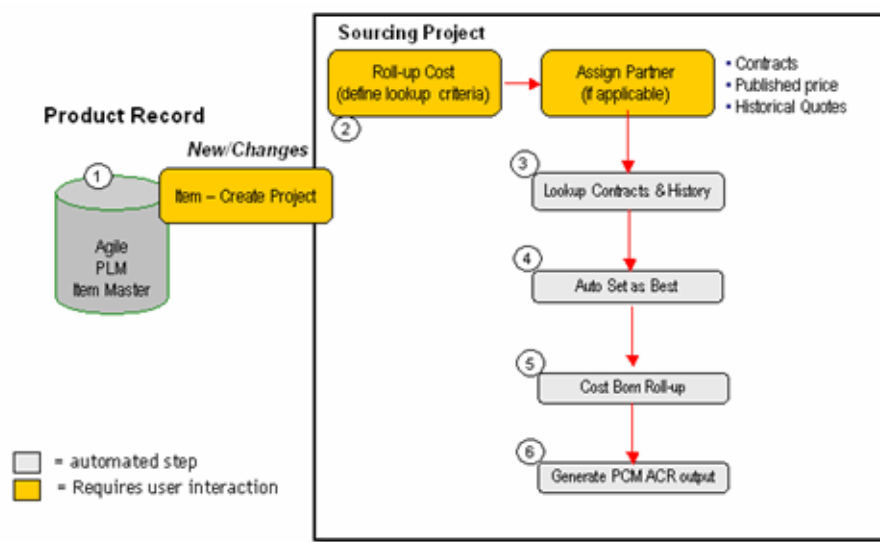
Non PCM users, such as Engineering, Marketing, Finance, NPI Teams, etc., require an intuitive mechanism to cost a BOM without going through PCM steps. This can be done using the Actions > Rollup Cost function.

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

---

**Note:** Any manually set best responses are over written when the Rollup Cost Report is run, since auto-set as best is executed as part of the report process. If you want to keep your manually set best responses, run the Assembly Cost Report instead.

---



To Rollup Cost:

1. Open the sourcing project.
2. Click Actions > Rollup Cost. You can opt for either:
  - the existing prices available in a sourcing project (Actions > Rollup Cost > Using Project Prices) or

- the latest prices that have been published in Item Master (Actions > Rollup Cost > Using Price Repository).

If you opt to use previously published prices (Using Price Repository):

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

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

4. You may specify the remaining parameters or use default settings.
5. If desired, click Optional Criteria to specify the Ship To location, Suppliers, Customers, or Programs.
6. Click Look-up to generate the report.

---

---

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

---

---

## Other Project Actions

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

- Bookmark - Save a bookmark so that you can return to the project quickly. To see bookmarks you have saved in an Agile client, open the My Bookmarks folder.
- Subscribe - Subscribe to the project and consequently receive notification of events that happen to that object.

---

---

**Note:** The subscription functionality is only for changes that happen to certain fields on the cover page of the sourcing project. It is not applicable to any changes on the other project tabs.

---

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

---

---

**Note:** PCM does not support hard-deleting a project.

---

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

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

---

## Managing Project Items

This chapter provides information about managing items in a sourcing project.

### About Project Items

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

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

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

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

### Managing Project Items

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

This section contains the following topics:

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

## Adding Existing Items to a Project

You can add items to a project when you create the project, or you can add them later. See ["Adding Items to a Project"](#) on page 2-15 for more details.

## Creating New Items in a Project

You can create items to add to a project either during or after project creation. When you create a new item, it is not automatically added to the Item Master. However, you can publish the item to the Item Master. For more information, see ["Creating New Items in a Project"](#) on page 3-2.

To create new items to add to a project:

1. Open a sourcing project and click on the Items tab.
2. Click Add > Create Items.
3. Select the Subclass of the item you want to create from the dropdown list.
4. If needed, change or enter the Number for the item. The system may automatically fill in this field.
5. Enter relevant text for the Description field.
6. Click to search for the Commodity lines, if any, that pertain to the item.
7. Click to select the related Product Lines.
8. Enter a value for the Standard Cost and select the currency from the dropdown list.

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**Note:** At this point, you can click Finish to create the item. If you want to add AML information for the item, continue with this procedure.

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9. Click the Add AML button.
10. Click to search for and select the Manufacturer Name, if needed, or begin to type in the name of the manufacturer and the system attempts to auto-complete your entry.
11. Enter the Manufacturer Part Number.
12. Enter details in the Manufacturer Part Description field.
13. Select the status of the manufacturer item from the dropdown list.
14. Click the Add to Table button.

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**Note:** You can add more parts to the AML by repeating steps 10-14 or you can add another item by clicking the Add Another Item button.

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15. Click Finish when you are done.

## Importing Items into a Project

You can import items into a project either during project creation or afterwards. Items imported into a project are not automatically added to the Item Master. However, you



can publish items to the Item Master. For more information, see ["Publishing Items and Manufacturer Parts"](#) on page 4-9.

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

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

---

---

**Note:** You must have the appropriate privileges to import objects.

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---

## Exporting Items from a Project

After you add items to a project, you may want to edit the item fields. Rather than editing each item individually, you may find it easier and more efficient to export project items and edit the exported document. BOM and AML data are not included in the export.

After you edit the file, you can import the revised items back into the project. See ["Importing Items into a Project"](#) on page 3-2.

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

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To export project items:

1. Open a project and select the Items tab.
2. Choose More > Export(csv) or Export(xls).

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**Note:** CSV is Comma Separated Values format, where a comma is used as an identifier of table columns. This ensures that when you export a CSV file, Agile PLM will place the data into its appropriate columns.

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

## Editing Item Information

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

To edit item information:

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

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---

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

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## Modifying Item Quantities

You can edit item quantities, or quantity breaks, on the Items tab or Analysis tab. Only root-level items can be modified.

To modify quantity breaks:

1. Open a project and select the Items or Analysis tab.
2. Select the row(s) of item(s) or click the All Rows Selection cell to select all the rows.

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**Note:** The Top Level Parts view on the Analysis tab displays only root-level items, which allows you to easily see which items you can edit.

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3. Choose Edit > Quantities. The *Edit Item Quantities* dialog appears.
4. Double-click in the field for each Quantity Break in each Effectivity Period that you want to modify and enter the new quantity.

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**Note:** You can click the Fill Up or Fill Down buttons to copy the value of a Quantity Break to several selected cells in the column.

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5. Click Save to update the quantities in the project.

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**Note:** Once your changes are saved, the quantities are automatically updated through sub-assemblies and components in the project.

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## Editing Quantity Per Assembly (QPA)

You can edit an item's Quantity Per Assembly (QPA) on the Item tab of a sourcing project. Only child level QPA's can be edited. A top level, parent item's QPA can not be edited. QPA is only editable when the sourcing project is in Draft or Open status.

To edit an item's QPA:

1. Open a project and select the Items tab.
2. Double-click the QPA field to make it editable.
3. Enter in the new value.
4. Click Save.

In order to avoid overwriting the updated QPA, when updating the sourcing project's content from the Item Master, you can choose to not have QPAs updated by un-selecting the QPA checkbox. By default, the QPA checkbox is selected, when either the All Content or BOM and AML options are selected. For more information, see ["Updating Project Content from the Item Master"](#) on page 2-19.

Additionally, you can publish the items in a sourcing project, including the QPA, to the Item Master. To publish the QPA, you must select the Bill of Materials option when

selecting content to publish. For more information, see ["Publishing Items and Manufacturer Parts"](#) on page 4-9.

## Updating Project Item Information

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

To update project item information:

1. Open a project and select the Items tab.
2. **Note** Choose Edit > Update From Item Master. For more information, see ["Updating Project Content from the Item Master"](#) on page 2-19.

## Calculating Item Quantities

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

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

---

**Note:** If partner splits have been specified, the project also applies the splits to the calculated quantities. See ["Calculating Quantities for Partner Splits"](#) on page 6-12 for more information.

---

At the top of the Items tab, the date and time when quantities were last calculated is displayed. When the calculated date and time is red, you need to click to recalculate quantities.

---

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

---

The following table shows a portion of a BOM. Assembly A1 has a Quantity of 1000.

Number	QPA	Quantity
A1	1	1000
P2	1	NA
P3	2	NA
P4	3	NA

The calculation to determine the quantities for sub-components P2, P3, and P4 is simple. For example, the following formula is used to calculate the quantity of P4:

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

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

To view sub-component quantities:

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

---

---

**Note:** You can choose to execute the action as a background process.

---

---

## Viewing Item Information

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

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

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

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To view item information from a project:

1. Open a project and select the Items tab. A list of items appears.
2. Click an item number to view the details of the item.

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**Note:** You can view the item information in the Item Master by clicking View in Item Master. The View in Item Master link appears when you mouse over the item number.

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To view item information from an RFQ:

3. Open an RFQ and select the Responses tab. The RFQ's line items appear.
4. Click an item number to view the details of the item.

## Deleting Items from a Project

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

Deleting an item from a project does not affect the Item Master. Published items exist in the Item Master even after deletion.

To delete items from a project:

1. Open a project and select the Items tab.
2. Select the item you want to delete.
3. Click Remove. A message appears to confirm the removal.

## Quote As and Cost Attributes

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

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

The Quote As and Cost attributes are not site-specific within a sourcing project. In PC, if you have the Sites tab enabled for the Items object, you can use Quote As and Cost in that tab and map the attributes into the sourcing project. Alternatively, you can map the attributes from Item-P2 into the project.

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

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

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1. Open a project and select the AML tab.
2. Select the row(s) of the item(s) for which you want to change the Quote As and Cost attribute information.
3. Choose Edit > Bulk Edit Items. The *Bulk Edit* dialog appears.
4. Change the attributes as necessary.
5. Click OK.

---

---

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

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---

Alternatively, you can change the Quote As and Cost attributes by clicking on the item number and changing them for that particular item.

## Expanding an Assembly

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

To expand an assembly:

1. Open a project and select the Items or Analysis tab. The content of the project appears.
2. **Note** Select the row of the assembly and choose More > Expanded Display. A window pops up with the assembly and its subassemblies expanded.

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**Note:** If you select another assembly and then click More > Expanded Display, a separate pop-up window appears.

---

On the Items tab, you can also expand an assembly, one level at a time, by clicking next to the icon.

Manufacturer part information is not displayed when you expand a BOM.

## Managing Partner Information for Items

You can assign partners to assemblies, which enables you to compare costs provided by multiple partners. Partners are really Supplier objects in PLM and there is no separate configuration that is required to make a Supplier as a Partner. Although a partner is fundamentally a supplier, if a partner is assigned to an assembly, the partner, unlike a supplier, is able to quote on all the parts in that assembly, assuming the parts are set to be costed.

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

You can select the Content BOM View checkbox in the *Data to Share With Suppliers* dialog to make the project BOM visible to the partner (on the General Information tab of a project, click the button next to the Data to Share field). If you want the partner to have access to the costed BOM analysis before they submit responses, for example, you can select the Costed BOM View checkbox.

---

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

---

## Adding Partners to Project Items

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

To add partners to projects:

1. Open a project and go to the Items or Analysis tab.
2. Select the row(s) of the item(s) to which you want to add partners.
3. Choose Edit > Partners. The *Assign Partners* dialog appears.
4. Click Add.
5. Search for and select the suppliers that you want to add. You can drag and drop them into the Partners table on the *Assign Partners* dialog.

6. Enter the Quantity Split percentage for each partner by editing the Splits % field. For more information about partner splits, see ["Calculating Quantities for Partner Splits"](#) on page 6-12.
7. Click Next Record to continue to edit partners for remaining items.
8. Optional: Select the Apply to all Remaining Selected Items checkbox to assign the partner and split percentage information to all the selected items in the project.
9. Click Finish. The partners appear in the Partner/Supplier list.

---

**Note:** You can also add partners and specify their AML splits from a project's AML tab. However, to display the partner splits on the AML tab, you must configure the tab's display properly. For more information, see ["Configuring Project Tabs"](#) on page 2-12

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## Removing Partners from Project Items

You can remove partners from selected items in a project.

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

---

To remove partners:

1. Open a project and go to the Items or Analysis tab.
2. Select the row(s) of the item(s) to which you want to add partners.
3. Choose Edit > Partners. The *Assign Partners* dialog appears.
4. Select the row of the partner you want to remove.
5. Click Remove.
6. Modify the split percentage for the remaining suppliers (if applicable).
7. Optional: Select the Apply to remaining records checkbox to assign the partner and split percentage information to all the selected items in the project.
8. Click Finish.





## Project AMLs

This chapter provides information about managing AML data in a sourcing project.

### About Project AMLs

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



An AML can have manufacturer parts of status preferred, alternate, or any additional status that has been configured in the Java Client. For each internal item, there can be multiple manufacturer parts. In such cases, you can specify AML percentage splits. For example, you may want to use 70% of one manufacturer part and 30% of another, based on cost or availability. The sum of the AML percentage splits must equal 100.

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

### Show or Hide AML

The AMLs of an item can be viewed, added, deleted, or modified in the AML tab. In the heading row, the icon marks the Has AML column. If an icon is present in the Has AML column, that item has AML.

You can view the AMLs by clicking on the icon next to the item number. To view AMLs of all the Items across the entire list simultaneously, click More > Display AML Rows. To hide all the AMLs across the entire list, click More > Hide AML Rows.

## Editing Item Attributes

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

The Quote As and Cost of the item define the type of price required for that item - material, non material or both. For more information, see "[Quote As and Cost Attributes](#)" on page 3-7.

## Bulk Editing

When you need to make a universal change in certain visible attributes, such as Cost, Make/buy or Quote As, across the entire list of items or a set of selected items, you may bulk edit them.

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---

**Note:** You cannot use bulk edit to modify all attributes of an item or manufacturer part. You can only edit flex fields and a few cover page standard attributes, such as Make/Buy, UOM, and Description.

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To bulk edit an attribute:

1. In a sourcing project, click on the AML or Analysis tab.
2. Select the desired row(s) of Items or all the rows on displayed page or all the pages.
3. Click Edit > Bulk Edit Items (or Edit > Bulk Edit Mfr Parts). The *Bulk Edit* dialog appears.

---

---

**Note:** On the Analysis tab, your only option is to click Edit > Bulk Edit.

---

---

4. Pick a field from the Attribute dropdown list and enter a corresponding Value.
5. If you want to change more attributes, click on the icon to open up more Attribute and Value rows.
6. Click OK to save the changes.

## Filtering AML Data

In the AML tab, you can use filters to see only a subset of data, instead of seeing the whole set. You can filter on any number of fields or you can use one of the pre-defined filters.

The pre-defined filters available via the Views dropdown list are:

- Invalid Data - Displays items or manufacturer parts that do not exist in the product record. Click More > Validate Items to identify which are valid and which ones are not.
- Items not in RFQ - Displays items that are not part of any RFQ.
- Items with Splits - Displays items with AML.

- Supplier proposed Alternates - Displays items that have alternate manufacturer parts that have been proposed by suppliers.

---

**Note:** The Views dropdown is located next to the Personalize button.

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Alternatively, you can make use of filters by clicking on the Personalize button.

To filter AML Data in a project:

1. Open a project and click the AML tab.
2. Click Personalize.
3. Click the *Field* dropdown list to select a field by which to filter.
4. Click the *Operator* dropdown list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected.
5. Select a value for the filter criteria.
  - For text attributes, type a value.
  - For list attributes, click to select a single or multiple values from available values list.
6. To add additional filters, click the.
7. Click Apply.

---

**Note:** If you want to save this filter for future use, click Save. You may have to click Save As to save the settings as a new filter. If you are unable to save, you may not have the proper privileges.

---

## Adding an AML to an Item

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

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

You can add an AML to items in three ways:

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

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**Note:** For information about updating the project with data from the Item Master, see ["Updating Project Content from the Item Master"](#) on page 2-19.

---

To add an AML to a project item manually:

1. Open the sourcing project and click on the AML tab.

2. Click on the number of the item to which you want to add an AML. The quick view window appears for the item.
3. Select the AML tab.
4. Click Add. The *Add AML to Item* dialog appears.
5. Click next to the Manufacturer Name field. The search palette appears.

---

**Note:** If you know the Manufacturer Name, begin typing it in the Manufacturer Name field and the system will attempt to auto-complete the name.

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6. Enter the search criteria and click Search. The search results appear.
7. Add the manufacturers by double-clicking the row you want to add.
8. Enter the manufacturer part number and description in the corresponding fields.
9. Select the status of the AML, e.g. Preferred or Alternate, from the Status dropdown list.
10. Click Finish.
11. Change the AML status and split percentage in the corresponding fields, as necessary.

---

**Note:** You can add an AML to other items from within this window, by clicking Next, finding the desired item, and then repeating steps 3-10 in this procedure.

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12. Click Close.

---

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

---

## Importing AML Data

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

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

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

---

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

---

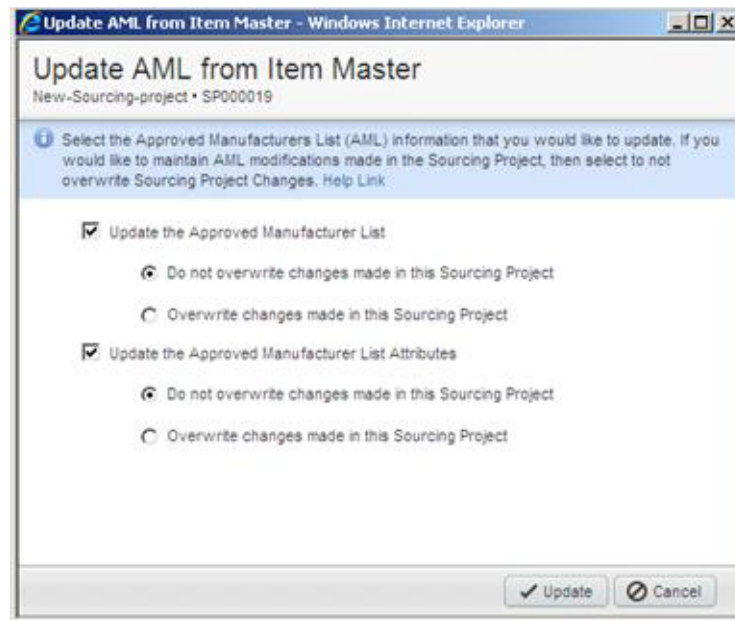
## Retrieving AML Data from the Item Master

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

To retrieve an AML from the Item Master:

1. Open a project and go to the AML or Analysis tab.
2. Select one or more items.
3. Chose Edit > Update AML from Item Master.

The *Update AML from Item Master* dialog, which facilitates you to "Update the Approved Manufacturers List" and/or "Update the Approved Manufacturers List Attributes", appears.



The checkboxes enable you to select "Do not overwrite changes made in this Sourcing Project" or "Overwrite changes made in this Sourcing Project", thus bringing forth four possible scenarios:

- Update the Approved Manufacturers List + Do not overwrite changes made in this Sourcing Project
  - AMLs added in the PC are brought into the Project.
  - AMLs deleted in the PC are deleted from the Project also, even if any of these AMLs were updated by the buyer.
  - AMLs added 'only' in the Project, and not in the PC, are retained.
  - AMLs deleted 'only' from the Project, and not in the PC, will not be added again.
- Update the Approved Manufacturers List + Overwrite changes made in this Sourcing Project
  - AMLs added in the PC are brought into the Project

- AMLs deleted in the PC are deleted from the Project also, even if any of these AMLs were updated by the buyer.
  - AMLs added 'only' in the Project, and not in the PC, are removed.
  - AMLs deleted 'only' from the Project, and not in the PC, will remain deleted, 'unless' they come again as part of PC.
  - Update the Approved Manufacturers List Attributes + Do not overwrite changes made in this Sourcing Project  
The system updates only those AMLs and Manufacturer Parts that have not been modified by the buyer. If, however, buyer has modified the AML Split of a Manufacturer Part, then only Mfr Part attributes, such as Description, flex fields, etc. will be updated, not the AML Split & AML Status.
  - Update the Approved Manufacturers List Attributes + Overwrite changes made in this Sourcing Project  
The system updates existing AML attributes, i.e., AML Splits & AML Status, besides updating Manufacturer Part attributes, such as, Manufacturer Part flex fields, Description, etc.
4. Click Update.

## Deleting an AML Row

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

To delete AML rows:

1. Open the sourcing project and click on the AML tab.
2. Click on the number of the item from which you want to delete an AML. The quick view window appears for the item.
3. Select the AML tab.
4. Select the row(s) of the AMLs you want to delete.
5. Click Remove.
6. Adjust the AML split percentage, if necessary.
7. Click Close.

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---

**Note:** You can also delete an AML by selecting the row(s) you want to delete in the AML table and then clicking the Remove button.

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## Validating Manufacturer Names

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

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

---

**Note:** If a supplier-proposed manufacturer exists in the Item Master, and you validate the manufacturer and manufacturer part once, the manufacturer will be shown as valid. There will be no need to create a new manufacturer.

---

To validate manufacturer names:

1. Open a project and go to the AML or Analysis tab.
2. Select the row(s) of the AML(s) you want to validate.
3. Click More > Validate Items. If the information is in the Item Master, the validation is successful.
4. If not successful, click the symbol next to the manufacturer name. The *Search Manufacturers* palette appears.
5. Enter in the search criteria and press Enter.
6. Select the correct manufacturer from the search results by double-clicking the row.

The AML table is updated with the manufacturer name.

## Validating Manufacturer Part Numbers

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

To validate MPNs:

1. Open a project and go to the AML or Analysis tab.
2. Select the row(s) of the AML(s) that you need to validate.
3. Click More > Validate Items. If the information is in the Item Master, the validation is successful.
4. If not successful, click the symbol next to the manufacturer part number. The *Search Manufacturer Parts* palette appears.
5. Enter the search criteria and press Enter.
6. Select the correct manufacturer part from the search results by double-clicking the row.

The AML table is updated with the manufacturer part information, including the name and number.

## Setting the Target Price

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

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

You can set a target price for an item and choose to share that price with the supplier. The target price can be different for each price scenario. For instance, if you have 2 quantity breaks, you can have different target prices for each quantity break.

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

- Auto - set the target price for selected items as a percentage of standard cost or any other price/cost field. For example, if you have multiple types of standard cost, one from an ERP system and one from an external source (which is stored as a price/cost field in the Items tab), you can set the target price to be a percentage of the actual standard cost or as a percentage of the cost from the external source.
- Manual - set the target price for each selected item manually.

To auto-set the target price:

1. Open a project and go to the AML or Analysis tab.
2. Select the row(s) of the item(s) for which you want to set the target price.
3. Choose Edit > Auto set Targets. The *Set Target Price* dialog appears.
4. From the dropdown list located after the phrase "*Set Target Price as a percentage of*", select the base cost, such as Standard Cost, to establish targets.

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**Note:** All money fields are listed as options in this dropdown list.

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5. In the Percentage of Base Cost field for each quantity break, enter the number that indicates the percentage of the standard cost you entered in the Item Master.
6. Click OK. The target price is updated on the AML tab of the project.

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---

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

---

---

To manually set the target price:

1. Open a project and go to the AML or Analysis tab.
2. Select the row(s) of the item(s) for which you want to set the target price.
3. Choose Edit > Target Costs. The *Set Target Price* dialog appears.
4. Enter the target cost for each item (if multiple items were selected) in the corresponding Target Cost field. You can copy and paste values, as needed.
5. Click Apply. The target price is updated on the AML tab of the project.

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**Note:** These target prices will be reflected in new RFQs. To apply these target prices to existing RFQs, choose More > Update RFQ Targets.

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## Updating Target Prices in RFQs

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

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

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**Note:** The target price is only updated for response lines that are locked and in draft mode.

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To update target prices in RFQs from a project:

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

## Publishing Items and Manufacturer Parts

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

When you publish data, you can use Redlining or Authoring mode. You can add redlines to a change order, such as an ECO, MCO, or SCO. In PCM, you most often will use Price Change Orders (PCOs).

To publish items and manufacturer parts:

1. Open a project and go to the AML or Analysis tab.
2. Select the row(s) of the item(s) you want to publish.
3. Click More > Publish Items to Item Master. The *Publish to Item Master* dialog appears.
4. Set the following options:
  - **Specify Contents to Publish** - Check the box for each content type to publish. Depending on the project data you have selected, you can select Item, Bill of Material, Approved Manufacturer List, and Manufacturer Part.
  - **Specify Default Types** - Select the default type for items, manufacturers, and manufacturer parts. Note that the items and manufacturer parts get published only to the types selected in this section. If the default type is different than the type that the item belongs to in the Sourcing Project, the item gets published based on the default type. For example, if the part is defined as a "Capacitor" in the Project-Items tab and during publish, if you choose "Resistor" as the default, the part is going to be published as a resistor and not as a capacitor.
  - **Publish Mode** - Select either Redlining or Authoring mode.

If you select Redlining mode, you must specify a change order. Redlining mode, as its name implies, highlights in red any existing BOMs or AMLs that have changed. All

items published in Redlining mode are placed on the Affected Items tab of the specified change order.

If you select Authoring mode, you can update unreleased items and create new preliminary items. Once an item has a pending change, you can no longer use Authoring mode to update it.

- Update Mode - Select "Only Add and modify data (do not delete it)" or "Add, modify, and delete data."

If you choose "Only Add or modify data (do not delete)," BOMs and AMLs are updated but no information is deleted. This is the default selection. If you choose "Add, modify, and delete data," new data will be added and existing BOMs and AMLs will be completely replaced with the published data.

1. If you selected *Redlining* mode, set the following option:
  - Change Order - You can select an existing change order or create a new one. Click to select an existing change order. Click to create a new change order.
2. Click Publish Items to Item Master. After the BOM and AML changes are published to the Item Master, the tab from which you launched the publish action appears.

If you published from the AML tab, the published date and time appear in the *Publish Date* field on the AML tab. If you published from the Analysis tab, the published date and time appear in the *Publish Item Date* field on the Analysis field. If the appropriate field is not visible, click Personalize to change the selected attributes.

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## Analyzing Project Data

This chapter provides information about analyzing sourcing project data.

### Analyzing Project Data

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

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

You can select which fields to view on the Analysis tab. You can also filter the data. For more information, see ["Filtering Project Data"](#) on page 2-14.

The Analysis tab provides support for several analysis features including:

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

### Completing Non-Analysis Tasks on the Analysis Tab

During the sourcing process, you may have to move from tab to tab within the sourcing project to accomplish specific tasks that are necessary to completing the sourcing process.

To improve the efficiency of the sourcing process, however, several key tasks that you could previously only complete on the Items or AML tabs are now available on the Analysis tab. This allows you to remain on the Analysis tab and use the same filters and views that you need to manage project items, AML, and project data analysis. Note that tasks that have been replicated on the Analysis tab from the AML or Items tabs are still also available on the original tabs.

The following table describes the tasks that have been replicated from the AML or Items tab to the Analysis tab.

Task	Description	Relevant sections
Add Items	Items can be added using the following methods: Create New Search & Add Import Copy/Paste Drag/Drop	See <a href="#">"Adding Items to a Project"</a> on page 2-15 for more information.
Remove Items	Remove items at the root level.	See <a href="#">"Removing Items"</a> on page 5-16 for more information.
Edit Quantities	Edit item quantities for all root items.	See <a href="#">"Modifying Item Quantities"</a> on page 3-4 for more information.
Expanded Display	Select a root item and click on More > Expanded Display to display the expanded BOM in a separate pop-up window.	See <a href="#">"Expanding an Assembly"</a> on page 3-7 for more information.
Edit Partners	Edit partners. Previously this was only available on the Items and AML tabs.	See <a href="#">"Adding Partners to Project Items"</a> on page 3-8 and <a href="#">"Removing Partners from Project Items"</a> on page 3-9 for more information.
Bulk Edit Items & Bulk Edit Mfr. Parts	Bulk edit items or manufacturer items by clicking Edit > Bulk Edit.	See <a href="#">"Bulk Editing"</a> on page 4-2 for more information.
Content Update	Update sourcing project content with the latest information from Item Master. Previously, this feature was only available on the Items tab.	See <a href="#">"Updating Project Content from the Item Master"</a> on page 2-19 for more information.
Update AML from Item Master	Get the latest information for the AML from the Item Master.	See <a href="#">"Retrieving AML Data from the Item Master"</a> on page 4-5 for more information.
Set Target Costs	Set target costs manually or automatically. Previously, this feature was only available on the AML tab.	See <a href="#">"Setting the Target Price"</a> on page 4-7 for more information.
Update RFQ Targets	Previously, this feature was only available on the AML tab.	See <a href="#">"Updating Target Prices in RFQs"</a> on page 4-9 for more information.
Validate Items	Validate items. Previously, this feature was only available on the AML tab.	See <a href="#">"Validating Manufacturer Names"</a> on page 4-6 and <a href="#">"Validating Manufacturer Part Numbers"</a> on page 4-7 for more information.

Task	Description	Relevant sections
Publish Content	Publish content by clicking Publish > Prices.	See " <a href="#">Publishing Items and Manufacturer Parts</a> " on page 4-9 for more information.

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**Note:** A few of the tasks mentioned in this table are only applicable to root-level items. You can use the Top Level Parts option in the Views dropdown to filter out non-root items.

---

## Filtering Project Data

In the Analysis tab, you can use filters to see only a subset of data, instead of seeing the whole set. You can use one of the pre-defined filters that are available via the Views dropdown.

The pre-defined filters available via the Views dropdown list are:

- Items not in RFQ - Displays those items that are not in an RFQ. If an item has multiple manufacturer parts and one of the parts is not in an RFQ, then the item and that particular part gets displayed.
- Items with Sourcing Exceptions - Displays those items that have supplier responses that have exceptions.
- Items with Split - Displays those items that have AML with splits among them.
- Parts with Best Price - Displays those items or manufacturer parts that have been flagged as "best". A part's price gets flagged as best when you use the Analyze > Set As Best option.
- Parts with Price - Displays those items or manufacturer parts that have prices.
- Parts without Best Price - Displays those items or manufacturer parts that have not been flagged as "best".
- Parts without Supplier - Displays those items that do not have prices from suppliers or from the price lookup.
- Parts awaiting Response - Displays those items or manufacturer parts that have been sent to a supplier through an RFQ, but have not received a response from the supplier.
- Supplier Proposed Alternates - Displays manufacturer parts that have been proposed as alternates.
- Top Level Parts - Displays the root-level items.

Alternatively, if you want to specify attributes by which the data should be filtered, you can use the filter functionality that is available via the Personalize button. Multi-column filtering is available on the Analysis tab.

To filter data in a project:

1. Open a project and click the Analysis tab.
2. Click Personalize.
3. Click the *Field* dropdown list to select a field by which to filter.

4. Click the *Operator* dropdown list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected.
5. Select a value for the filter criteria.
  - For text attributes, type a value.
  - For list attributes, click to select a single or multiple values from available values list.
6. To add additional filters, click the button.
7. Click Apply.

If you want to save this filter for future use, click Save. You must then click Save As to save the settings as a new filter.

## Filtering Published Prices

When the prices are published from the Analysis tab in a sourcing project, the system stamps its publishing date. If, and when, a publish operation fails, the Publish Date field remains empty, however, the Publish Status field will contain an icon. The reason for failure is displayed when you mouse over the icon in that column.

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

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

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

You could also, for example, filter for "Publish Price Date Is Null" to display all the prices that have not been published or that failed to publish.

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

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

## Viewing Costed BOM Comparisons

To view the costed BOM comparison:

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

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**Note:** If your project includes price periods, the lowest cost is based on the current price period. Best Response is selected based on the criteria mentioned while performing Set As Best. But Lowest Price Response will not be provided across all the Partners & Suppliers, each Partner/Supplier will have his own Response Line. If there are multiple quantity breaks per price period, the first quantity break is used. For information about how to calculate costs for a different price period, see ["Modifying Price Scenarios"](#) on page 2-20.

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

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3. To view information for a selected price scenario, click the Price Scenarios dropdown list and select either Default Price Scenario, All Price Scenarios, or Selected Price Scenarios.

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

4. Click OK to return to the Analysis tab.

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

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## Exporting a Costed BOM

After you have created a costed BOM comparison, you can quickly export the results to a text file.

To export a costed BOM comparison:

1. Open a project and go to Analysis tab.
2. Choose Analyze > Costed BOM Comparison. The Costed BOM table appears showing duplicate item rows, one for each partner or supplier.
3. Click the Export button. The *Export Assembly Cost (Sourcing Project)* dialog appears.

To recalculate costs, make sure the *Recalculate Costs Upon Report Execution* box is checked.

1. Select the Assembly Lines, Suppliers, and Price Scenarios to export.
2. Click Finish to generate the report.
3. The File Download dialog box appears.
4. Click Save to save the costed BOM comparison information as an Excel Comma Separated Value (CSV) or Worksheet (XLS) format file to your computer.
5. Click Close.
6. Click Return to return to the Analysis tab.

## Viewing Non-Material Cost Comparisons

The non-material cost comparison displays the non-material total cost and the non-material cost breakdown. Prices could be taken from associated RFQs or from price lookups. This view lets you compare the non-material costs provided by various suppliers.

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

Quantity break 1	Quantity break 2	These cells are blank					
Number	Rev	Commodity	Supplier	Quantity	Total Non-Materials	Quantity	Total Non-Materials
A1	A	ASSY	EMS1	100	2.50 USD	200	5.0 USD
A1	A	ASSY	EMS2	100	2.25 USD	200	4.0 USD
A1	A	ASSY	EMS3	100	2.00 USD	200	4.0 USD
A2	B	ASSY	EMS1	500	8.00 USD	1000	16.00 USD
A2	B	ASSY	EMS2	500	6.00 USD	1000	12.00 USD
A2	B	ASSY	EMS3	500	5.00 USD	1000	10.00 USD
A3	C	ASSY	EMS1	200	20.00 USD	400	40.00 USD
A3	C	ASSY	EMS2	200	15.00 USD	400	30.00 USD
A3	C	ASSY	EMS3	200	12.00 USD	400	24.00 USD

When you run a non-material comparison, AML-related columns like MPN number, manufacturer, AML status, etc. can be displayed for those items that have AML and are set to custom component. Each manufacturer part is displayed in its own row in context with its parent item. If an item does not have any AMLs, but was quoted as custom component, it still appears in this view.

To view a non-material cost comparison:

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

If you chose Selected Price Scenarios, select price scenarios in the Hidden Fields list, and then Click to add them to the Displayed Fields list. Click OK.

4. Click Return to return to the Analysis tab.

---

**Note:** If you want to see a breakdown of any non-material fields (apart from totals), those fields need to be enabled in the Java Client in the Sourcing Projects Class > Analysis Tab > Attributes:Non Material Price Entry. Only the attributes that are enabled in this tab in the Java Client are visible in the Non-Material Comparison view.

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## Understanding PCM Analysis Reports

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

The following table describes the analysis reports:

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

**Note:** The Unit Cost Comparison, Effective Cost Comparison, and Response Comparison reports enable comparison of response lines against selected target cost(s). You have the option to select target cost(s).

## Use Case Scenarios

There are a few business use cases that may require you to run specific analysis reports. The following table provides a breakdown of which reports to run according to the use case scenario.

Use Case Scenario	Description of Scenario	Time Frame of Analysis	Reports to Run
-------------------	-------------------------	------------------------	----------------

Commodity Management	This is a common business scenario in which you need to evaluate the aggregate volume costs and supplier/material risks of items and AMLs.	Quarterly or forward pricing (4 qtrs)	<p>To analyze costs:</p> <p>Unit Cost Comparison</p> <p>Cost Pareto</p> <p>(Optional) Response Comparison</p> <p>To analyze risk:</p> <p>Sourcing Exceptions</p> <p>(optional) AML Differences</p>
Co-Sourcing	In this scenario, you are faced with the need to evaluate product cost leverage and risk across suppliers and manufacturing partners.	Single period (1 qtr) or sometimes multiple periods, e.g. current + 2-3 quarters forward cost	<p>To analyze material costs:</p> <p>Assembly Cost Report</p> <p>Unit Cost Comparison</p> <p>Cost Pareto</p> <p>(optional) Response Comparison</p> <p>To analyze risk:</p> <p>Sourcing Exceptions</p> <p>(optional) Effective Cost Comparison</p> <p>(optional) AML Differences</p>
Design for Cost & Supply	In this scenario, you are faced with the need to evaluate product cost and risk across product lifecycle.	1-3 years forward cost (proto period, pilot, early product or full production ramp)	<p>To analyze costs:</p> <p>Assembly Cost Report</p> <p>Unit Cost Comparison</p> <p>Cost Pareto</p> <p>(optional) Response Comparison</p> <p>(optional) Effective Cost Comparison</p> <p>(optional) Supply Base Analysis</p> <p>To analyze risk:</p> <p>Sourcing Exceptions</p> <p>(optional) AML Differences</p>

External Manufacturing: New Business Acquisition	In this scenario, you must analyze pricing to win new business.	If trying to win new business: Quantity-based.  If re-pricing: Time-based, 1 quarter.	To analyze costs:  Assembly Cost Report  Unit Cost Comparison  Cost Pareto  Effective Cost Comparison  (optional) Response Comparison  To analyze risk:  Sourcing Exceptions  (optional) AML Difference  (optional) Supply Base Analysis
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## Generating Analysis Reports

You can run reports directly from within an open sourcing project.

To generate an analysis report from within a sourcing project:

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

Alternatively, you can run sourcing reports without having to open a project. This is useful in situations where you need to run several reports, but do not need to interact with any particular sourcing projects. You can run reports without opening a sourcing project, by accessing the *Reports* drawer in the left pane.

To generate an analysis report from the Reports drawer:

1. Click on the Reports drawer in the left pane.
2. Navigate to sourcing reports by clicking Reports and Analytics > Standard Reports > Sourcing Reports.
3. Click on the name of the report that you want to run.
4. Click Execute. In some cases, as part of the report wizard, you will have to select the project that you want to run the report on.

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

The following four sections describe, in more detail, the procedures for generating the four most commonly used reports:

- Assembly Cost
- Cost Pareto
- Sourcing Exceptions
- Unit Cost Comparison

## Running the Assembly Cost Report

You can use the Assembly Cost Report to understand the total cost of a BOM. You can also use the report to compare total costs between multiple manufacturers and determine the impact of non-material and material cost differences.

To run the Assembly Cost Report

1. Open a sourcing project and select the Analysis tab.
2. Select the item rows you want to include in the report, by clicking the corresponding row selection cells or the All Rows Selection cell.
3. Select Analyze > Reports and Analytics > Assembly Cost Report. The *Assembly Cost Report* wizard appears.
4. On the *Select Layout and Configuration* page, select the Layout you want to use.
5. Click Next.
6. Select the Assembly Lines you want to include in the report. Only top-level assemblies are available for selection.

---

---

**Note:** If running this report for a supplier response, rather than a project, both top-level and subassemblies are available for selection.

---

---

7. Select the Suppliers you want to include in the report. Project partners and best of suppliers are available for selection.
8. Select the Price Scenarios. All available price scenarios from the project are available for selection.
9. **Optional:** If desired, select the checkbox to "Recalculate costs upon execution."

---

---

**Note:** If this option is selected, the report dynamically runs a new costed BOM roll-up.

---

---

10. Click Finish.

The following is an example of the report output:

Report Output - Windows Internet Explorer

ORACLE Assembly Cost (Sourcing Project) Page 1 of 2

Project Name: ED\_012909  
 Assembly Lines: 1001BE  
 Suppliers: Best of Supplier  
 Currency: USD (United States Dollar)

Summary Section

suppliers.name	Assembly	Description	GPA	Target Cost	Quantity	Total Materials Price	Total Non-Materials Price	Total Unit Cost	HIRE
Best of Supplier	1001BE	COMPUTER	1	500	2.40	0.00	2.40		

The highlight for total unit cost indicates that the rollup is incomplete.

Created By: Analyst 14, Agnes  
 Create Time: 04/30/2009 01:41:09 PM PDT

## Running the Cost Pareto Report

You can use the Cost Pareto report to identify key items or commodities with the greatest impact on total cost. Based on report results, you can then focus your price negotiation efforts on those items and commodities that have the greatest impact on total cost.

To run the Cost Pareto report

1. Open a sourcing project and select the Analysis tab.
2. Select the item rows you want to include in the report, by clicking the corresponding row selection cells or the All Rows Selection cell.
3. Select Analyze > Reports and Analytics > Cost Pareto Report. The *Run Cost Pareto Report* wizard appears.
4. On the *Select Layout and Configuration* page, select the Layout that you want to use.
5. Click Next.
6. Select the Grouping Options that you want to include in the report. The grouping options that are available depends on the layout you chose in the previous step.

---

**Note:** All leaf-level items from selected commodities or items are included in the analysis.

---

7. **Optional:** Enter a percentage value (0 to 100) to filter the results of the analysis based on the commodities' contribution to the total cost.
8. Select the Cost for Analysis options. You can select up to four different criteria, such as Standard Cost, by which the costs should be compared.

---

**Note:** If the system finds a price for an item based on the first option, it returns that price. If not, the system continues to try the other criteria. Items/commodities without a value for any of the four costs, are then displayed with empty cost fields in the report.

---

- Select the Price Scenario that should be considered in the analysis.

---

**Note:** Only price scenarios from the project are available for selection.

---

- Click Finish.

The following is an example of the report output:

Report Output - Windows Internet Explorer

ORACLE Cost Pareto Report

Project Name: ED\_012909  
 Currency: USD(United States Dollar)  
 Price Point: QuantityBreak1

Page 1 of 1

Commodity	Item	Description	Quantity	Total Unit Price	Extended Price
ASIC	4244	ASIC4500	1,500	0.05	75.00
ASIC	4760	ASIC4000	1,000	0.05	50.00
ASIC Total Extended Price					125.00
700-RES	510-1003-06	RES, FILM 100K 1/8 5%	500	0.05	25.00
700-RES Total Extended Price					25.00
100-CAPS	0160-5947	CAP 1000PF 50V	1		0.00
100-CAPS Total Extended Price					0.00
All Commodities Total Extended Price					150.00

Created By: Analyst 14, Agnes  
 Create Time: 04/28/2009 02:07:35 PM PDT

## Running the Sourcing Exceptions Report

The Sourcing Exceptions report allows you to identify exceptions that are a signal of high risk, such as parts approaching end-of-life, parts with long lead times, or parts with no alternate sources. Once you have identified the high risk situations, you can take appropriate measures to eliminate the risks.

To run the Sourcing Exceptions report

- Open a sourcing project and select the Analysis tab.
- Select the item rows you want to include in the report, by clicking the corresponding row selection cells or the All Rows Selection cell.
- Select Analyze > Reports and Analytics > Sourcing Exceptions Report. The *Run Sourcing Exceptions Report* wizard appears.
- On the *Select Layout and Configuration* page, select the Layout that you want to use.
- Click Next.
- Select the checkbox for the sourcing exceptions, such as Obsolete Parts, that you want to report.

---

**Note:** Some sourcing exception options also require that you enter a time period (in days). For example, to find parts that are near their end of life date, you must enter a number to indicate how close the parts are to that date.

---

7. **Optional:** Select specific Price Scenario(s) to include in the report.

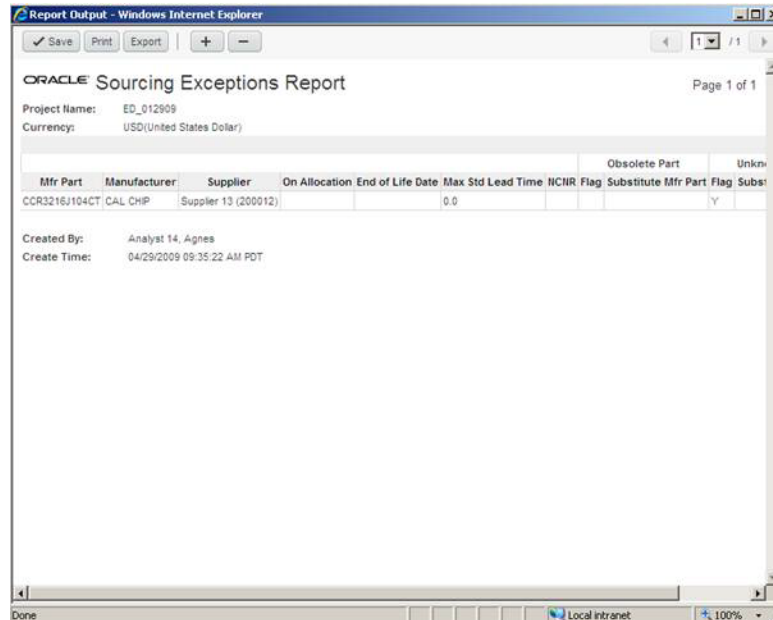
---

**Note:** Only price scenarios from the project are available for selection.

---

8. Click Finish.

The following is an example of the report output:



## Running the Unit Cost Comparison Report

The Unit Cost Comparison report allows you to monitor costs to identify opportunities for proactive cost management with suppliers and partners. You can compare costs between suppliers, as well as compare costs to existing reference costs, such as standard costs, target costs, contracts, etc. Based on results from the analysis, you may want to renegotiate with suppliers to realign prices and set targets to match market prices.

To run the Unit Cost Comparison report

1. Open a sourcing project and select the Analysis tab.
2. Select the item rows you want to include in the report, by clicking the corresponding row selection cells or the All Rows Selection cell.
3. Select Analyze > Reports and Analytics > Unit Cost Comparison Report. The *Unit Cost Comparison Report* wizard appears.
4. On the *Select Layout and Configuration* page, select the Layout that you want to use.
5. Click Next.
6. Select the Suppliers and Price Scenarios you want to include in the report. The project prices that will be included in the report are based on the suppliers and price scenarios chosen here.

---

**Note:** In the Suppliers field, the Best of Suppliers/Partners option is available for selection.

---

7. Click Next. The *Compare Against Reference Prices* page appears.
8. Click Add. You must add reference prices from the Item Master to compare to the sourcing project prices that were provided by the suppliers you selected in the previous step.
9. On the *Add Scenario* page, complete the fields, as desired. Some fields, such as Price Type, are required for defining the price comparison scenario.

---

**Note:** You can narrow down the comparison scenario by specifying the desired Program, Customer, Ship To location, etc.

---

10. Click Finish. The reference prices from the added scenarios appear on the *Compare Against Prices* page.
11. Click Next.
12. Choose one base price to which all other prices listed should be compared. Select the row by clicking its row selection cell.

---

**Note:** All of the sourcing project prices, as well as the prices from the Item Master, that you selected in the previous steps are listed here.

---

13. Click Finish.

The following is an example of the report output:

Report Output - Windows Internet Explorer

ORACLE Unit Cost Comparison Report

Project Name: ED\_012909

Currency: USD (United States Dollar)

Page 1 of 3

Number	Standard Cost	Manufacturer	Target Cost	Total Unit Price	Price Delta %	Price Delta %	Price Delta %
0160-5947	0.00			0.00			
1001BE	0.00			2.40			
1067	0.00			0.00			
1194	0.00			1.95			
2	0.00			0.05			
2040	0.00			0.25			
2450	0.00			0.05			
2510	0.00			0.05			

Done



## Setting the Best Response for an Item

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

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**Note:** Any manually set best responses are over written when the Rollup Cost Report is run, since auto-set as best is executed as part of the report process.

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

The best response is indicated by a icon in the Best Response field. If the Best Response field is not visible, click Personalize to add it to the list of selected attributes.

You can also apply constraint factors, e.g. lead-time, so that only qualified responses can be set as best.

To set the best response manually:

1. Open a sourcing project and select the Analysis tab.
2. Select the row(s) of one or more response lines in the Analysis table.
3. Choose Analyze > Set As Best. The system automatically selects the lowest price among all the suppliers and flags it as best.

To auto-select the best response:

1. Open a sourcing project and select the Analysis tab.
2. Select the row(s) of the response lines in the Analysis table from which you wish to find the best response.
3. Choose Analyze > Auto-set as Best. The *Auto-Select Responses* dialog appears.
4. Select the Content Selection Criteria.

Choose the price scenario to which the rules should be applied. You can apply the auto-select to all Items, or just selected Items. By default, the All Items option is selected.

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

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

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5. Select the additional criteria for finding the best response:

- Alternate Parts - Select this checkbox to find the best response for the selected items and manufacturer parts among the preferred and alternate parts in the Analysis table.
  - Historical Quote Responses - Select this checkbox to find the best response for the manufacturer part from the item's quote history (if any).
6. From the Best Response Selection Criteria dropdown, select up to three of the following criteria by which to auto-select best responses:
    - Lowest Cost - Selects the best response based on which has the lowest cost.
    - Lowest Cost Within Lead Time Constraint - Selects the best response based on the lowest cost within a specified lead time constraint (in days).
    - Shortest Lead Time - Selects the best response based on which has the shortest lead time.
    - Supplier Rating - Selects the best response based on supplier ratings. You can prioritize the list of ratings. Your Agile administrator can customize the supplier ratings as required. The default ratings are Approved, Offered Active, Offered Inactive, and Strategic.
    - AML Preferred status - Select the best response based on AML status. You can prioritize the list of AML status types. The Agile administrator can customize the AML status types as required. The default AML status types are Preferred and Alternate.
  7. Click Auto-Select.

## Removing Responses

Before you send out an RFQ to suppliers, you may choose to do a price lookup on items in your sourcing project. The lookup process retrieves prices from the Item Master and creates responses on the Analysis tab. These prices can then be used as base prices for the suppliers.

When you no longer need these responses, you can remove these responses or any other responses from a sourcing project as long as they are not part of an active RFQ.

To remove responses from a project:

1. Open a project and select the Analysis tab.
2. Select the response line(s) you want to delete.
3. Click Edit > Remove > Responses.

## Removing Items

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

Deleting an item from a project does not affect the Item Master. Published items exist in the Item Master even after deletion.

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**Note:** Only root-level items can be selected for removal.

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To remove items from a project:

1. Open a project and select the Analysis tab.
2. Select the item you want to delete.

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**Note:** You may choose to use the Top Level Parts view to display only root-level items, which allows you to easily see which items you can remove.

---

3. Click Remove > Items.

## Applying Price Adders to Responses

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

Price adder fields can be enabled for suppliers or for buyers (for internal purposes). In the Analysis tab, a buyer can only set price adders that have been enabled for internal purposes. If there are price adders that are enabled for suppliers, only suppliers can set them during the RFQ process; those fields cannot be set by the buyer. For more information, see *Agile PLM Administrator Guide*.

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

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

- Commodity - Each commodity is listed so that you can include a unique price adder percent or a fixed amount for each one.

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**Note:** Price adders are automatically inherited by the parts that belong to a commodity.

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- Part - The price adders are applied only to the parts that you select.

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

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

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

---

Using SmartRules, you can also regulate whether or not price adders can have zero or negative values. You can use the Zero Value For Material Price Adder Fields SmartRule and the Negative Value For Material Price Adder Fields SmartRule to either "Allow" or "Disallow" a user from setting a price adder to 0 or a negative value, respectively. You can also set the SmartRules to "Warning", which is the default value.

To Apply Price Adders:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the items for which you need to add price adders.
3. Choose By Part, By Commodity, or By Supplier in Analyze > Apply Price Adder. The corresponding *Apply Price Adders* dialog appears.
4. Enter the price adder information for each item for each quantity break.
5. Click Apply.

---

**Note:** You can use the Fill-up and Fill-down buttons to copy a price from one row to the rows above or below it.

---

## Looking Up Price Information

You can verify the existence of a price for a specified period and quantity in the Item Master. If a part already has a price, you can decide whether you still want to create an RFQ for that part, or whether you want to use the price you already have. You can either use the price information of the item, or you can modify the price information and send the RFQ to suppliers for quote.

In Agile PCM, there are three types of prices that are available out-of-box:

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

When you look up data for a particular item or manufacturer part, the price and response fields are updated with data that you can leverage in your analysis process. You can have any number of price types, which are configured in the Java Client as Price subclasses. All those price types are displayed when you do a price lookup so that you can choose the price type the application should be searching for when it does a price lookup.

## Looking Up Contracts, Published Prices, or Quote Histories

You can look up prices of any type of price that is configured in the Java Client.

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

Price information associated with items in the Item Master is called published prices. Prices for a part can be published after you have finished price negotiations with a

supplier. For more information about publishing prices, see ["Publishing Prices for Items and Manufacturer Parts"](#) on page 5-21. You can use the published price for items in the project.

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

When deciding on how to populate the prices, consider the following example. Assume that an RFQ has two price scenarios, Q1 & Q2, and you want to look up prices for Q1. The system will try to find a price based on the "base scenario," which is Q1. If the All Price Scenarios option was selected, once the system finds a price, it will use the same price (Q1's price) for Q2 and update both scenarios with the same price. If just one scenario was chosen, only that one is updated.

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

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To look up prices:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the item for which you want to look up pricing information.
3. Choose Edit > Price Lookup. The *Price Lookup from Item Master* dialog appears.
4. Select a price scenario from the Base Scenario dropdown list.
5. Click the button next to the Price Types field. Select either Contract, Published Price, or Quote History.
6. Decide whether to Populate Price to all scenarios or just one.
7. Enter the quantity deviation, in percentage, if you select that option, or select the Ignore Quantities button to ignore the quantity.
8. Enter the number of days from the RFQ date range, plus or minus, within which the quotes have been received or select the Ignore the date ranges button to ignore the date of quote.

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**Note:** This date range criterion is only applied to sourcing projects with effectivity periods. In sourcing projects with quantity breaks, all prices are considered regardless of the date range.

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9. Enter the number of days before the current date to consider quotes that occurred within that period of time.
10. Select the Lowest Price, Lead time, or Most recent response button to filter the results if multiple rows are retrieved.
11. Optional: You can also specify the following search criterion:
  - Ship To Location
  - Supplier(s)
  - Program(s)
  - Customer(s)

12. Click Look Up.

## Looking Up Partner Pricing

You can look up partner pricing for all pricing that you are authorized to view. For example, you can look up pricing information before creating an RFQ.

There are two ways to use this feature:

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

### Price Lookup Precedence

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

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

## Looking Up Prices From a Sourcing Project

Instead of looking for prices from the price repository, you can look for prices from parts in another sourcing project. In this case, you must pick which price scenario you want to look up in the other project. If the same part exists in both projects, the system gets the best price from the other project and applies it to the current project.

To look up prices:

1. Open a project and select the Analysis tab.
2. Select the row(s) of the item for which you want to look up contract pricing information.
3. Choose Edit > Lookup Prices From a Project. The *Price Lookup from Sourcing Project* dialog appears.
4. Select a sourcing project from which you want to look up prices.
5. Optional: Select a supplier(s) to which you want to narrow down your search.
6. Optional: You can choose to include or not include the following:
  - a. Prices that are not flagged as best
  - b. Items that do not have matching revisions
7. Click Continue.
8. Using the dropdowns, select the price points from the source sourcing project that you want to map to each of the target sourcing project's price points.
9. Click Look-up.

## Publishing Prices for Items and Manufacturer Parts

You can publish as much price information as you get for each item or manufacturer part. You can use the published price information for items and manufacturer parts in other sourcing projects.

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

When you publish prices, you can use Redlining or Authoring mode. To create redlines for price line data, you must specify a PCO. Once prices are published to the product record, they are searchable and viewable from the Prices tab in an item or manufacturer part.

### Publishing Rolled Up Material Costs for Assemblies

When you attempt to publish a price, the manner in which prices are published is based on how the part was quoted during the quoting process.

If a part is quoted as a:

- *component*, only material prices get published.
- *assembly*, non-material prices get published. (See note below.)
- *custom-component*, both material and non-material prices get published.

If you choose to publish an assembly, and if that assembly has rolled up material prices, the application publishes both the rolled up material prices and the non-material prices. The rolled up price is published even if it is partial, however, there will be no indication in the price repository that the price is partial. The supplier that provided the non-material prices is also used when publishing the rolled up prices. Note that if the assembly does not have non-material prices, the prices for the assembly will not be published, regardless of whether or not there is a partial rolled up material price.

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**Note:** Regardless of how the part was quoted, rolled up prices are partner-specific. Only the values corresponding to the assigned partner are rolled-up and published.

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### Price Publishing Process

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

Each failure is reflected in the Published Price Status column with a icon.

In addition to publishing prices contained in a project, you can publish items and manufacturer parts. For more information, see ["Publishing Items and Manufacturer Parts"](#) on page 4-9

To publish item prices:

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

---

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

---

3. Choose Publish. The *Publish to Item Master* dialog appears.
4. Set the following options:
  - Publish - Select specific price scenarios or you can choose to publish for all price scenarios.
  - Price Type - Select a Price type. The price types provided with Agile PLM are Contract, Published Price, and Quote History, but your company may implement other types.
  - AutoNumber Source - This dropdown list appears once you select a Price Type. If a Price Type has more than the default AutoNumber Sources, the list facilitates selection of one.
  - AML Prices - Select Publish AML Pricing to Manufacturer Parts to only publish the AML price(s). Select Publish AML Pricing to Items to publish AML price(s) to Item(s). This will display the Item price and AML prices in Prices tab under Item Master. This feature is beneficial when Agile PCM extracts/feeds an ERP system, enabling other users (such as a different manufacturing site) to refer Item prices and their AML prices.
  - Publish Mode - Select either Update (redlining) or Authoring mode.

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

If you select Redlining mode, you must specify a PCO to publish updated prices. Redlining mode, as its name implies, highlights in red any price lines that have changed. All prices imported in Redlining mode appear on the Affected Prices tab of the specified PCO.

Change Order - Click to select a PCO. You can select an existing PCO or create a new one.

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---

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

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Update Mode - The "Only add and modify data only (do not delete it)" setting updates price lines without deleting rows. If you choose "Add, modify, and delete data," existing price lines are completely replaced with the published price lines, potentially deleting price line data.

- Publish Error Stops - The publishing prices process can stop due to errors resulting from a PCO that is not closed, or a manufacturer part number in the sourcing project that does not exist in the Item Master, etc. Once the system encounters an error, it terminates the price publishing process immediately. You can choose from 50 or None.

To minimize the amount of stops due to publish errors, you can select 50 from the Publish Error Stops dropdown list. This makes the system carry on with the publishing of the prices subsequent to all errors, and stops the process only when the 50th error occurs.



If you select the None option from the dropdown list, the system continues to attempt publishing for all responses, irrespective of the number of errors it encounters.

5. Click Publish items to Item Master.

---

**Note:** If an error occurs when you publish prices, a icon is displayed in the Published Price Status () column. When you mouse over the icon, you can see a description of the error. If the Published Price Status field is not visible, click Personalize to change the selected attributes on the Format tab.

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**Note:** When you re-publish a response that has been modified, instead of overwriting the existing price line, a new price line is created. One of the attributes that determines price line uniqueness is the *Date Effective From* field. This field is automatically set once a supplier sends in a response. Therefore, once the response line is published, if the modified price line needs to be published again, the Date Effective From field will not be the same as the original, so the system creates a new price line.

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## Converting Currency Values

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

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

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

---

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

---

### Viewing Responses in the Normalized Currency

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

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

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To view normalized currency rates:

1. Open a project and select the Analysis tab.
2. Select More > View in Project Currency. The information in the table is refreshed.

### Viewing Responses in the Original Currency

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

To view original currency rates:

1. Open a project and select the Analysis tab.
2. Select More > View in Project Currency. The information in the table is refreshed.

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**Note:** By default, the currency view is Original.

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### Refreshing Currency Conversion Rates

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

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

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

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To refresh currency conversion rates:

1. Open a project and select the Analysis tab.
2. Choose More > View Latest Currency Rates. The *View Conversion Rates* dialog appears.
3. Click Update to update response line prices other than the published item prices in the project.

## Exporting Price Information from a Project

After you have completed your sourcing activities, you can quickly export the results to an Excel file. You can export the responses as a flat list of responses and prices.

To export price information:

1. Open a project and select the Analysis tab.

2. Select the item response line(s) you want to export.
3. Choose More > Export (xls) or More > Export (csv), depending on the file type you want to export (Microsoft Excel Workbook or CSV). The File Download dialog box appears.
4. Click the Save button to download the file.

## Bulk Editing

You can use the bulk edit feature to edit an entire list of items or a set of select items when you need to make a universal change to any of the following:

- standard item fields
- flex item fields
- standard manufacturer part fields
- flex manufacturer part fields
- flex response fields

Data can be edited in bulk in the following two locations:

- AML tab - allows you to edit item and manufacturer part fields. Standard fields (like item description, manufacturer part description, etc.) and flex fields are bulk-editable in this view.
- Analysis tab - allows you to edit standard and flex item and manufacturer part fields. Additionally, flex response fields are bulk-editable in this view.

---

**Note:** You can edit AML status and split percentage on a per-item basis, by clicking on the item number.

---

To Bulk Edit in the Analysis tab:

1. Open the sourcing project and select the Analysis tab.
2. Select the desired row(s) of item(s) or select all rows by clicking the All Rows Selection cell.
3. Select Edit > Bulk Edit. It opens up *Bulk Edit* dialog.
4. Select a field from the Attributes dropdown list and enter a value in the corresponding Value field.
5. If you want to change more attributes, click to open up more Field and Value rows.

---

**Important:** The Attributes dropdown list contains only those attributes, such as RESPONSE\_TEXT01, that have been set Visible in Java Client. For more information on enabling Flex Field Attributes, see the *Agile PLM Administrator Guide*.

---

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

The attributes will only be updated when the attributes are applicable to the row. For example, item flex attributes will only be applied to item rows and will not have

effects on manufacturer rows. Response flex attributes will only be applied when there are suppliers associated with the item.

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## Requests for Quotes (RFQs)

This chapter provides information about working with requests for quotes (RFQs).

### About RFQs

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

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

You can use RFQs to do the following:

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

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

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

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

## RFQ Terminology

This section provides definitions of important terminology related to RFQs.

Terms	Descriptions
RFQ	Request for quote. A medium for requesting quotes for items from suppliers.
RFQ Response (or Supplier Response)	The medium through which the supplier can respond to the RFQ. Multiple responses are created in the RFQ when multiple suppliers send responses.
Response line	The response medium between you and the supplier for negotiating the price terms. Each item has a response line in the response depending on the Quote As attribute set for the item.
Standard Cost	Applies to an item. This is the market cost of the item. It is site-specific. The standard cost is for a single unit.
Target Cost	Applies to item. This is the expected cost of the item by you or the supplier. This can be a percentage of the standard cost. Target cost is for a single unit.
Quote As	Applies to an item. This is used in the RFQ for getting the quote according to the option you set. There are three Quote As options: Assembly - The supplier quotes only the non-material price. Component - The supplier quotes only the material price. Custom Component - The supplier quotes both the material price and non-material price. Non-material fields, including labor rate and sales tax, are flex fields and are not available out-of-box.

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

## RFQ Terms and Conditions

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

### Configuring RFQ Terms & Conditions in Agile Java Client

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

---

**Note:** For information on how to configure your RFQ Terms & Conditions form, read the section RFQ Terms and Conditions on page 149.

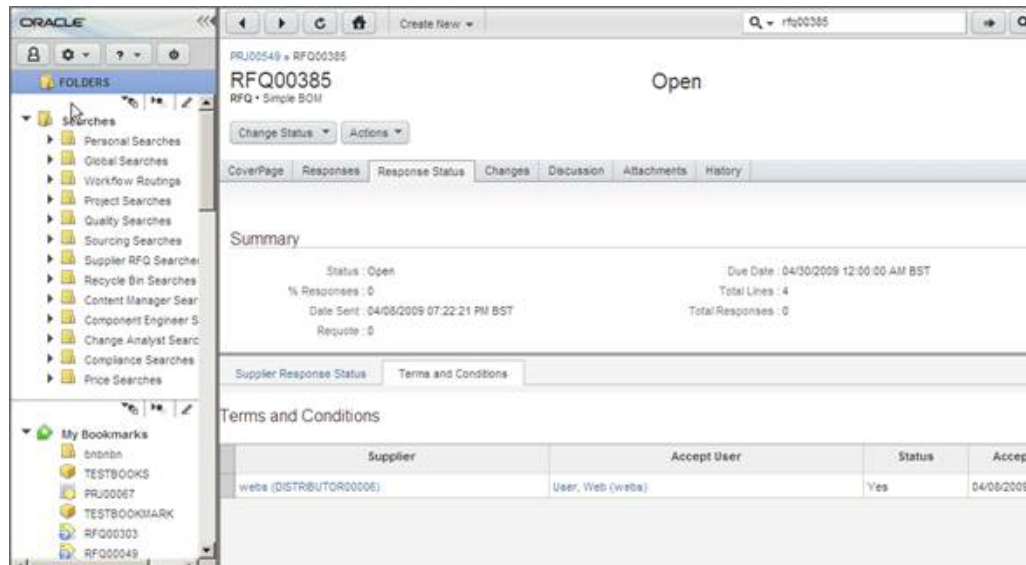
---

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

### Buyer Side RFQ Terms and Conditions Set Up

Users can make RFQ Terms & Conditions mandatory at the sourcing project level. To do this, select Yes for the "Require RFQ Terms and Conditions" field when you create the sourcing project. This setting automatically applies to all RFQs created from the sourcing project, however, you can override this at the RFQ level by altering the setting for "Require RFQ Terms and Conditions" on the RFQ cover page. You must have the correct privileges to do this.

You can maintain status of the Terms and Conditions acceptance status. As supplier users accept the Terms and Conditions, you can see their acceptance status on the Terms and Conditions sub-tab on the Response Status tab of the RFQ.



## Supplier View

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

---

**Note:** If a supplier does not accept the Terms and Conditions the first time he tries to open an RFQ, the Terms and Conditions form continues to open every time he attempts to open the RFQ, until the terms are accepted.

---

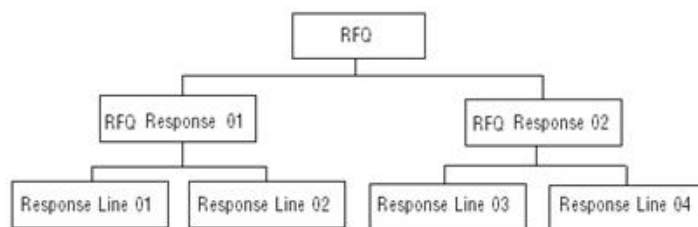
If a supplier user forwards the RFQ to another supplier user, the new user will also have to first accept the terms in order to open the RFQ.

## RFQ Process Flow

The RFQ process involves three related objects:

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





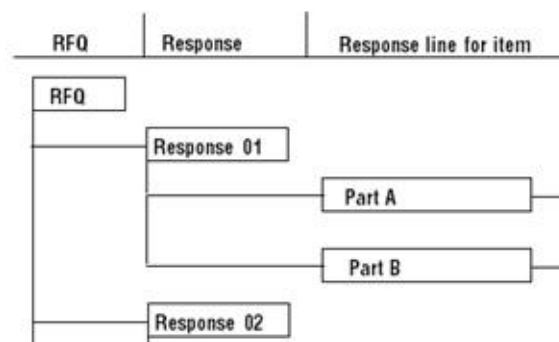
## How RFQ Responses and Response Lines are Determined

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

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

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

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














## RFQ Tasks


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

1. Create an RFQ.
2. Add items to the RFQ.
3. Assign suppliers and partners.
4. Change RFQ status to Open.
5. Send the RFQ to suppliers and partners.
6. Review response lines from suppliers.

7. Negotiate or requote (if needed).
8. Publish prices to the Item Master.

The following table lists PCM symbols that help you quickly identify the status of RFQs. These symbols appear on tabs in either the sourcing project or the RFQ.

Symbol	Represents	Description
	RFQ	This icon represents an RFQ.
	Quoted	On Items and AML tabs of a sourcing project, this icon appears for items that are added to the RFQ.
	Error	This icon indicates that there is an error in the response line. When you enter invalid data, such as text data in a numeric field, or when you leave a required field unfilled, this icon appears.
	Not Read	On the RFQs tab of a sourcing project, this symbol indicates that the RFQ has still not been opened to the Supplier.
	Pending	On the Responses tab of an RFQ, this icon appears for items in RFQs to indicate that the RFQ for the item has been sent to the supplier and a response is pending.
	Expedite	On the Responses tab of an RFQ, this symbol represents that a message to expedite the RFQ Response has been sent to the supplier.
	Locked	This icon appears for items in RFQs to indicate that the supplier cannot make any changes to the response lines they have sent. Once you open the RFQ line to a supplier, you can edit it only when it is subsequently Unlocked.
	Response	On the Responses tab of an RFQ, this icon appears for items that have received a response from the supplier.
	Requote	On Responses tab of an RFQ, this icon appears for items that are sent to suppliers for requote.
	Details	On the Responses tab of an RFQ, this icon marks the Has Price Information (price details) column. If a line item has a icon in this column, it means that it has price information available for it. You can click this dot icon to view the quoted amount.
	View Response Changes	On the Responses tab of an RFQ, this icon indicates that some changes were made to the quotes since the first response. You can click the icon to view the changes that have been made to the quote.

Symbol	Represents	Description
	Alternate/Proposed manufacturer part	On the Responses tab of an RFQ, this icon indicates that the supplier has proposed an alternate part for the quoted manufacturer part. The response line displays the icon and the part information. Note: Suppliers can not propose alternates unless the Propose Alternates option is selected in the Data To Share in the RFQ.

## RFQ Status

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

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

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

## Creating Request for Quote

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

- Sourcing Administrator
- RFQ Manager

If you have not been assigned either of these roles, someone with appropriate privileges can share a sourcing project with you, thereby allowing you to create RFQs. For more information, see ["Sharing a Project with Other Users"](#) on page 2-9.

---

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

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To create an RFQ:

1. Open a sourcing project and select either the Items, AML, or Analysis tab.
2. Select the row(s) of the item(s) for which you want to create an RFQ.
3. Choose RFQ > Create. The *Create Requests for Quote with Identify RFQ Number* wizard appears.
4. Enter a unique identification number for the RFQ in the Number field, or click to get an automatically generated number.
5. Click Next. The *Enter RFQ Information* page appears.

---

**Note:** On any page of this wizard, you can click Finish instead of Next. The system will create the RFQ, but you must go in and fill in details at a later time.

---

6. Enter mandatory information
  - A brief description about the RFQ in RFQ Description field.
  - Click the Due Date calendar and select a date. Suppliers should send responses by this date.
7. Enter optional information
  - Click the button next to the Data to Share field, and select the data that you would like your suppliers to see.
  - Click the button next to the Response Requirements field, and select the response data that you need from the suppliers.
  - Enter any instructions that you find important or useful for the suppliers in the Supplier Instructions field.

---

**Note:** The Data to Share, Response Requirements, and Supplier Instructions settings are all automatically inherited from the sourcing project.

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- Select the Owner of the RFQ. The owner, by default, is the one who created the RFQ. Only users with the appropriate privileges can create RFQs.
  - Select the RFQ Type.
  - Add users to the Authorized Users field. These users will have access to the RFQ.
8. Click Next. The *Select Part Addition Rule* page appears. See ["Part Addition Rule"](#) on page 6-9 for details.
  9. Click Next. The *Select Suppliers* page appears.

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

---

**Note:** This option to select partner appears only if the items have partners associated to them. See ["Assigning Suppliers and Partners"](#) on page 6-12.

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10. Click the button next to the Suppliers field to open the supplier search palette. You can narrow down your search by selecting Suppliers, Supplier Groups, or any other user-defined category of supplier. For easy identification of suppliers, see ["Supplier Identification"](#) on page 7-9.
11. Select the dissemination method from the Dissemination Method dropdown list. For more information, see ["Dissemination Methods"](#) on page 6-9.
12. Filter the selected suppliers based on their ratings, by selecting the desired checkboxes next to the listed ratings. For example, if you want the RFQ to be responded to only by the Approved Suppliers, select the checkbox next to Approved. This filter eliminates the rest of the suppliers.
13. Click Next. The *Add Attachments* page appears.
14. Add attachments, and click Finish.

---

**Note:** Errors on the page are marked by the icon.

---

## Part Addition Rule

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

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

The figure displayed for each option is a representation of the effect that the option has on the items in the RFQ. Use the figures to determine which option is best for you.

## Dissemination Methods

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

You can also apply a rating to the Product - Ship To location relationship, which lets you specify whether or not the supplier is strategic or approved to sell a product for

your ship-to location. It can also specify that they offer the product, but that you have not approved it.

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

The dissemination method involves the supplier ratings. The pre-defined supplier ratings provided with Agile PLM are:

- Approved
- Strategic
- Offered Active
- Offered Inactive

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

---

The RFQ dissemination methods include:

- Manufacturer - The RFQ is assigned to suppliers based on their manufacturer offerings.
- Commodity - The RFQ is assigned to suppliers based on their commodity offerings.
- All - The RFQ is assigned to all suppliers regardless of their manufacturer or commodity offerings.

### Example - Dissemination by Manufacturer

Project: PRJ

Part: Part A

Manufacturer: Acme

Ship To Location: San Jose

Supplier Rating: Strategic

Here is a list of suppliers and their manufacturer offerings:

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

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

### Example - Dissemination by Commodity

Project: PRJ

Part: Part A

Commodity: Comm1

Ship To Location: San Jose

Rating: Approved

Here is a list of suppliers and their commodity offerings:

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

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

## Routing RFQs

Information that you enter when you create an RFQ determines which suppliers receive the RFQ. This can help you get the best deal from suppliers. To be sure an RFQ is sent to the correct supplier organizations, make sure all manufacturer and commodity offerings are current and suppliers are rated.

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

## Adding Items to an RFQ

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

To add items to an RFQ:

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

# Assigning Suppliers and Partners

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

A partner is essentially a supplier that has the advantage of access to AMLs of the top level assemblies. A supplier only sees the Assemblies, and not its AMLs. You can assign partners to the items on the Items tab of a sourcing project. See ["Adding Partners to Project Items"](#) on page 3-8 for details.

You can also assign suppliers to items on the RFQ Responses tab. See ["Assigning Suppliers"](#) on page 6-18 for details.

## Calculating Quantities for Partner Splits

Although partner splits are defined within the sourcing project, they do not directly impact the quantities within a sourcing project. Once you create an RFQ, the system splits the quantities in the RFQ based on the split percentages you had defined.

**Note:** Although partner splits do not affect quantities in a sourcing project, analysis on the Analysis tab does get impacted by the splits.

If you have split desired quantities amongst partners using percentages, quantity calculations are automatically done within the RFQ. The following table shows a portion of a BOM. Assembly A1 has a Quantity of 1000. Two partners, P1 and P2, have been assigned to the assembly with percentage splits of 60% and 40%, respectively.

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

[Quantity of P4 for P1] = 3000 \* 0.60 = 1800

[Quantity of P4 for P2] = 3000 \* 0.40 = 1200

Number	QPA	Quantity	Partners/ Splits	Blank cell
P1 (60%)	P2 (40%)	These cells are blank		
A1	1	1000	600	400
P2	1	1000	600	400
P3	2	2000	1200	800
P4	3	3000	1800	1200

There is no restriction on the sum of the partner percentage splits. The sum does not have to equal 100 and can exceed a total of 100, if desired.

# Updating Target Prices of Items

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



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**Note:** You can edit the target price of the item in the AML tab of the project. For information about how to publish prices to the Item Master, see "[Publishing Prices for Items and Manufacturer Parts](#)" on page 5-21..

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### Project-Level Update

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

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

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

### RFQ-Level Update

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

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

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

---

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

---

## Deleting Items from RFQs

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

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

---

To delete items from RFQs:

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

---

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

---

## Sending RFQs

You can send RFQs to Web suppliers, or you can export an RFQ to an Excel Worksheet or Comma Separated Value (CSV) file and send it as an email attachment or as a hardcopy to non-Web suppliers. Note that if an RFQ is sent to a non-Web supplier via Agile PLM, the RFQ originator receives the new RFQ notification since the non-Web supplier has no web contact to whom the system can send the notification.

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

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### Sending RFQs by Changing the Status

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

To send RFQs by changing the status:

1. Open a sourcing project and select the RFQ tab
2. Open an RFQ by clicking the RFQ number.
3. Choose Change Status > Open.

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---

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

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The RFQ notification is sent to Web suppliers.

### Sending Line Items in RFQs

You can send out line items that are ready for quoting, rather than waiting until all the items in the RFQ are ready to send out for quotes.

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**Note:** Make sure that each line item has an assigned supplier.

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To send line items in an RFQ:

1. From the Responses tab of an RFQ, select the row(s) of the items that you want to send out.
2. Choose Response > Send Requests to Suppliers.

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**Note:** This sends only the selected line items to suppliers.

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### Exporting RFQs for Non-Web Suppliers

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

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

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---

To export RFQs for non-Web suppliers:

1. Open an RFQ and go to Response Status tab.
2. In the Supplier Response Status section, select the row(s) of the non-Web supplier to whom the RFQ should be sent.
3. Click Export > Export (csv) or Export > Export (xls), depending on the file type you want to export (Microsoft Excel Workbook or CSV). The File Download dialog box appears.
4. Click the Save button to download the file.

---

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

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## Working with RFQs

This section consists of the following:

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

### Finding RFQs

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

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

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

To find RFQs assigned to you:

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

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**Note:** A user must have the *(Restricted) RFQ Responder* role to be able to view the Supplier RFQ Searches.

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### Viewing RFQs

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

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

To view the RFQ in the project:

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

## Changing the RFQ Status

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

To change the status of the RFQ:

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

## Deleting RFQs

You can delete an RFQ only if its status is Draft or Closed. You cannot delete open or locked RFQs. When you delete an RFQ, any prices previously published from the RFQ to the Item Master remain unaffected. Since there is no recycle bin search available for RFQs, once deleted, there is no way to bring an RFQ back.

To delete an RFQ:

1. Open an RFQ.
2. Click Change RFQ Status. The status of the RFQ must be either Draft or Closed.

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

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

## Viewing RFQ Changes

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

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

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

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To view RFQ changes:

1. Open an RFQ and click on the Changes tab.
2. Click the sub-tab that you want to view.

You can select the *Unapplied Item Changes* tab (default view), the *Project Item Changes* tab, or the *Supplier Responses* tab.

3. You can change the view on the sub-tabs by selecting a view from the Views dropdown list.

In the *Project Item Changes* tab, you can choose to see *Items Added*, *Items Deleted*, or *Items Modified*.

### Viewing RFQ History

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

To view RFQ history:

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

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

## Working with RFQ Responses

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

This section consists of the following:

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

### Filtering RFQ Responses

On the Responses tab of an RFQ, the filter toolbar allows you to isolate the responses you want to see. You can use pre-defined filters/views, as well as filter by specific attributes.

---

**Note:** Alternatively, you can use one of the pre-defined filters, such as *Items Without Price* and *Items With Split*, which are listed in the Views dropdown list. This dropdown is located next to the Personalize button.

---

To filter the Responses tab of an RFQ:

1. Open an RFQ and go to the Responses tab.

2. Click Personalize.
3. Click the *Field* dropdown list to select a field by which to filter.
4. Click the *Operator* dropdown list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected.
5. Select a value for the filter criteria.
  - For text attributes, type a value.
  - For list attributes, click to select a single or multiple values from available values list.
6. To add additional filters, click the button.
7. Click Apply.

---

**Note:** If you want to save this filter for future use, click Save. You must then click Save As to save the settings as a new filter.

---

### Assigning Suppliers

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

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

#### Assigning Suppliers Manually

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

To assign suppliers manually:

1. From the Responses tab of an RFQ, select the row(s) of the items to which you want to add suppliers.
2. Choose Add > Suppliers. The *Search Suppliers* palette appears.
3. Search for and select the suppliers you want to add. Double click the suppliers or press Enter to add them to the Suppliers table.
4. Close the search palette.

---

**Note:** To distinguish suppliers, see "[Supplier Identification](#)" on page 7-9.

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#### Assigning Suppliers at AML Level

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

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

To assign Suppliers at the AML Level:

1. From the Responses tab of an RFQ, select the row(s) of the AML(s) in an Item, including the Item row, to which you want to add suppliers.
2. Choose Add > Suppliers. The *Search Suppliers* palette appears.
3. Search for and select the suppliers you want to add. You can double-click to add a supplier or drag and drop the supplier(s) to the Suppliers table.
4. Close the search palette.

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**Note:** To distinguish suppliers, see "[Supplier Identification](#)" on page 7-9.

---

### Auto-Assigning Suppliers

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

To Auto-assign suppliers to items:

1. From the Responses tab of an RFQ, select the row(s) of the item(s) to which you want to add suppliers.
2. Choose Add > Auto-Assign Suppliers. The *Auto-Assign Suppliers* dialog appears.
3. Click button next to the Suppliers field. The *Suppliers Groups* search palette appears.
4. Search, and select the suppliers from the results. Double-click individual suppliers or select multiple rows and press Enter to add suppliers into the Suppliers cell.

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**Note:** To distinguish suppliers, see "[Supplier Identification](#)" on page 7-9.

---

5. Select a dissemination method from the RFQ Dissemination Method dropdown list.
6. Select ratings from the list of available ratings. Only suppliers with the selected ratings will be used.
7. Click OK.

---

**Note:** The auto-assign suppliers functionality only works on IPN levels, and is not applicable to the AML level.

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### Expediting RFQ Responses

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

To expedite RFQ responses:

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

---

**Note:** A notification is sent to the supplier who has not responded to the RFQ. An expedited symbol appears in the Expedite column of the Supplier Response Status table.

---

### Importing Responses from Non-Web Suppliers

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

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

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

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

### Viewing Responses in Different Currencies

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

When you select the view, Agile PLM calculates and displays the price information based on the currency conversion rates. You select currency views and refresh currency conversion rates from the Responses tab the same way you do from the Analysis tab of a project. For more information, see "[Converting Currency Values](#)" on page 5-23.

### Looking Up Price Information

You look up price information in the Responses tab the same way you look up for price information in Analysis tab of a project. See "[Looking Up Price Information](#)" on page 6-20.

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

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## Editing Responses

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

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

To lock response lines:

1. From the Responses tab of an RFQ, select the row(s) of the response line(s) to lock.
2. Choose Response > Lock Response. A message may appear to warn you that a quote history will be created when the RFQ is locked.

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

To edit the response line:

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

---

**Note:** When you select the "Apply to all the selected response lines" checkbox, the Next button is disabled.

---

In the Responses tab, "Sourcing Manager Edited" appears in the Source column of the response line you edited.

### Response Entry Form

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

On this form there is an Apply to all the selected response lines checkbox. When you select this box, 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.

### Setting Response Lines as Pre-Quoted

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

To set response lines as pre-quoted:

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

### Requesting Requotes

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

To request Requotes:

1. From the Responses tab of an RFQ, select the row(s) of the response line(s) that require a requote.
2. Choose Response > Lock Responses.
3. Choose Response > Edit. See Response Entry Form for more details.

4. Click Next if you have selected multiple response lines, or click Finish.
5. Select the Apply to all the selected response lines checkbox to use the price and terms information of the current item for all the response lines selected. (Optional.)
6. Choose Response > Requote.

---

**Note:** The icon in the Response Status column indicates that a requote has been requested for the response line.

---

### Viewing Requote Status

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

To view requote status:

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

You can see the total number of requotes in the Requote column of the RFQ Status section and the number of open requotes that need responses from suppliers in the Open Requotes column of the Supplier Response Status section.

## Sharing an RFQ With Other Users

You can share an RFQ with another user. Sharing an RFQ means that you are granting another user or user group one or more of your roles.

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

---

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

---

To share an RFQ:

1. Open the RFQ.
2. Choose Actions > Sharing. The *Share With Users* dialog appears.
3. Click Add. The *Add Users* dialog appears.
4. Click the button to the right of the Users field.
5. Use the dropdown filter in the Users search palette to select all users (Users) or all groups (Groups) or any other specific group.

Enter your search criteria and click Search. You may also type a user's name if you know exactly how it appears (in the system), but you must first select a group to populate the Available Users list.

1. Select the users one by one, or select multiple users/user groups using the ctrl button on your keyboard. Drag and drop your selected item(s) to the Users cell.
2. Click the button to the right of the Roles field. The *Roles* palette appears. Select the appropriate role or roles for your chosen users to have available in connection with the RFQ. Drag and drop them into the Roles cell.

3. Click Save. Your additions are listed in the *Share With Users* window.
4. Click Close.

To remove users from an RFQ's Access Control List:

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

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1. Open the RFQ.
2. Choose Actions > Sharing. The *Access Control List: Share With Users* dialog appears.
3. Click the rows of users to remove.
4. Click Remove.

To see which objects have been shared with you:

1. Click the My Settings button in the Courtesy Controls area in the left pane.
2. Click the Share tab.

The Share tab lists the objects that have been shared with you by another user.

3. From your user profile, see if any objects have been shared with you via user groups. Click User Group tab. Click a desired group. Click on its Share tab.

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

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# Managing Customers, Commodities, and Suppliers

This chapter provides information about managing customers, commodities, and suppliers.

## Collaborating with External Organizations

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

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

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

## Before You Begin

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

## Roles Required to Manage Customers and Suppliers

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

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

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

## Managing Customers

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

### Creating a Customer

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

To create a customer object in Java Client:

1. Click the New Object button.  
The New dialog box appears. Agile PLM remembers what type of object you created last and displays that type in the Type field.
2. Select a customer type from the Type list.
3. In the Customer Number field, type a number, or click the AutoNumber button to enter a system generated number.
4. In the Customer Name field, type a name. Click OK. The customer is created and the General Info tab is displayed.
5. Complete the fields on this tab. For more information about the Customer Name, and other fields, see customer General Info tab fields table in "[Customer Fields and Attributes](#)" on page 7-3.

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

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

1. In an open customer, right click anywhere on the dialog and choose Save As.  
The *Save As* dialog box appears. Java Client automatically fills in the Type and Customer Number fields as they appear in the original customer.
2. If required, select a different customer type from the Type list. Click OK. The customer is created.
3. You can change the information in the fields as necessary. For more information about the Customer Name and other fields, see "[Customer Fields and Attributes](#)" on page 7-3.

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

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

To create a customer object in Web Client:

1. Click Create New Customers > Base Class from the main toolbar. The *Create New Customers Base Class* dialog appears.

2. Select a customer type from the dropdown list.
3. In the Number field, use the automatically system-generated number or type a new number. Alternatively, you can click the AutoNumber button, if set up by your Agile administrator, to get a system generated number.
4. In the Customer Name field, type a name.
5. Click Save. Web Client creates the customer and displays the customer with the General Info tab on top.
6. Click the other tabs to add additional information about the customer.

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

1. In an open customer object window, choose Actions > Save As. The *Save As* dialog appears.
2. In the Customer Number field, type a number or click the AutoNumber button to get a system generated number. The Web Client may automatically fill in both the Customer Number and the Type fields.

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**Note:** The way your Agile administrator has set up your system affects how things work in this step. You may be able to modify both fields, if needed.

---

3. Type a new Customer Name.
4. Click Save. The newly created customer appears.

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

## Customer Fields and Attributes

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

Field	Completed...	Contains...
Customer Number	When created; type the number or use the AutoNumbers button. Customer is uniquely identified by the number. (Required)	The number assigned to the customer when you create it.
Customer Type	Manually (Required)	Dropdown list of the customer types.
Customer Name	Manually (Required)	The name of the customer.
Description	Manually	The description of the customer. The maximum number of bytes is set by the Agile administrator; can be up to 1023 bytes, including space and carriage returns (which count as two bytes).
D-U-N-S Number	Manually	The industry standard Data Universal Numbering System (DUNS) number.

Field	Completed...	Contains...
Address	Manually	The mailing address of the customer.
City	Manually	The city where customer is located.
Zip Code	Manually	The zip code of the customer.
Contact	Manually	The name of contact person from the customer side.
Email	Manually.	The email address of the customer.
Phone	Manually	The customer contact phone number.
Fax	Manually	The customer fax number.
URL	Manually	The URL of the customer Web site.
Lifecycle Phase	Manually	The lifecycle phase of the customer. For example, the customer is Active or Inactive in this lifecycle phase.

## Editing a Customer

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

To edit a customer:

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

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

See "[Customer Fields and Attributes](#)" on page 3 for details.

3. Click Save.

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

## Creating Commodities

A part group can be one of the following:

- Commodity - used only in PCM
- Part Family - used only in PG&C
- Item Group - used only in PC

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

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



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

When creating a commodity, there is a Make Available As attribute that allows you to decide how the commodity should be treated. The options are:

- Commodity Only - only for PCM
- Part Family Only - only for PG&C
- Commodity and Part Family - can be used for PG&C & PCM
- Item Group - only for PC

---

**Note:** If the part group is only for PCM, the part group cannot have compliance information. If it is only for PG&C, the part group cannot be used for RFQ dissemination.

---

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

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**Note:** To create commodities, you must have the create privilege for commodities. If needed, contact your Agile administrator to obtain privileges.

---

To create a commodity in Web Client:

1. Choose Create New > Part Groups from the global menu bar. The *Create New Part Groups* dialog appears.
2. In the Type list, select Commodity. Other types of Part Family subclasses may also be available.
3. Specify a unique commodity name, which can be a short abbreviation (such as "Trans" for Transistor). The name is not case-sensitive.
4. **Note** Specify how you want the commodity to be treated using the Make Available As option.
5. Click Save. The new commodity appears with the General Info page.
6. Click Edit. Enter general information, such as a description. Make sure the Lifecycle Phase field is set to Active. The weight field is optional; it is only relevant for Product Governance & Compliance. Click Finish.
7. Click the other tabs to add additional information about the commodity.

---

**Note:** You cannot delete an item that is associated with a Part Group, or in other words, an item that appears on the Parts tab of a Part Group object. If the Commodity field is populated, the Actions > Delete command is disabled.

---

## Commodity Tabs

Commodities have the following tabs:

- General Info - provides general information about the commodity
- Parts - lists the parts that belong to this commodity category
- Compliance - lists the Specifications and Compositions of the commodity
- Suppliers - lists the suppliers who supply this commodity
- Attachments - lists the attached files for the commodity
- History - shows the history of events related to a commodity

---

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

---

## Associating Items with Commodities

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

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

---

To associate an item with a commodity in Web Client:

1. Open the commodity you want to work with and select the Parts tab.
2. Click Add. A new row appears in the Parts table.
3. Click and search for existing items.
4. Select items by double-clicking them or dragging and dropping them into the Parts table.

If not successful, any errors or warnings appear in the error message bar on the Parts tab. If there is no error, the added items appear as rows in the Parts table.

## Managing Suppliers

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

### Supplier Types

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

- Component Manufacturer - sells individual parts or components
- Contract Manufacturer - manufactures products but does not necessarily own the engineering design
- Distributor - purchases and resells products
- Manufacturer Representative - direct customer representative for a manufacturer

- Broker - responsible for the supply of goods and services to trading partners

## Partners and Suppliers

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

## Supplier Lifecycle Phases

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

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

## Creating a Supplier

Use the Supplier Creation dialog to create a supplier organization.

To create a supplier in Web Client:

1. Choose Create New > Supplier from the global menu bar. The *Create New Supplier* dialog appears.
2. In the Type list, select the appropriate supplier type, for example Broker. Once selected, all of the required fields will be displayed in the dialog.
3. Specify a unique supplier Name.
4. Enter details for the remaining fields, including flex field details.

See ["Supplier Fields and Attributes"](#) on page 8 for descriptions of the fields that appear in this dialog.

---

**Note:** In the Number field, use the automatically system-generated number or type a new number. You can also click the AutoNumber button to get a different system generated number, if needed.

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**Note:** Your Agile administrator may have altered the way the Number field is populated.

---

5. Click Save.

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

Click the other tabs, including the Contact Users tab, to add additional information about the supplier. See the corresponding sections in this chapter for information.

## Supplier Fields and Attributes

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

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**Note:** Some tabs may not be enabled by your administrator.

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

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

Field	Description
Maximum Number of Power Contact Users	The maximum number of supplier users that can be assigned a power user license
Default RFQ Recipient	The user in the supplier organization who gets the notification when an RFQ gets sent to the supplier.
Default Declaration Recipient	The user in the supplier organization who gets the notification when a declaration gets sent to the supplier.

### Buttons on the General Info tab

The General Info tab contains the following buttons:

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

The following sections describe the additional tabs.

## Supplier Identification

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

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

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

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

Agile1 (A0001)

Agile1 (AG015)

Agile1 (SJ001)

Agile1 (sup001)

## Adding Contact Users

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

To create a new supplier user in Web Client:

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

3. Click the button. The *Create New* dialog appears.
4. Enter the Username. Type the Login Password, and retype it to confirm.
5. Enter the Approval Password and retype it to confirm.

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**Note:** If you want to use the same password as the Login Password, select the Use Login Password for Approval checkbox. This will disable the Approval Password fields.

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6. Enter user details: First Name, Last Name, and Email.
7. Click Add.

Once the contact user is created, you may consider changing some of the following contact user fields:

- Status - Make sure the status field is set to Active.
- Role - The user's role assignments. This property determines a user's access to the objects in Agile PLM from the point of discovery forward.
- User Category - Agile PLM has three types of user licenses: Power, Concurrent, and Restricted. Restricted users are people outside your company (such as suppliers) who are given limited access to the Agile PLM system. Power users are not subject to concurrency counts and can therefore log in at any time. Both Restricted and Power users can respond to RFQs, but only Power users can generate and view reports.
- Sites and Default Site - Sites are used for distributed manufacturing, and indicate all of the company's locations where the user is involved. Default Site is the user's main base of work.
- Authorized Ship To and Home Ship To - The Authorized Ship To field indicates all company locations where the user can initiate sourcing activity. The Home Ship To location is the primary location where the user is responsible for sourcing activities.

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

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

---

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

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3. If you know the first name, last name, or user ID, enter it into the User ID field, which auto-completes as you type. Instead of using the auto-complete feature, you can search for the user and add it to the Supplier's Contact Users tab.
4. If applicable, on RFx Routing tab, select the user as the Default Recipient.
5. Under the Users Preferences - Display Preferences change Response Edit Mode to either Advanced Wizard Edit or Basic.

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

---

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

1. Open a supplier, and then click the Contact Users tab.
2. Click Add.
3. Search for an existing user by first name, last name, or username.
4. Add the user by double-clicking the row you want to add or by using the drag and drop feature.

---

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

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## Creating and Modifying RFx Routing Rules

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

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

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

To add a new routing rule:

1. Open a supplier, and then click the RFx Routing tab.
2. Click Add. The *Add Routing Rule* dialog appears.
3. Select a user from the Contact dropdown list.
4. Specify the Geography by selecting the continent, country/area, and state/province/region to associate with the contact user.
5. Click Add.

To edit a rule:

1. Select the routing rule that you want to modify on the RFx Routing tab.
2. Make required changes by directly editing the fields within the table.
3. To save the changes that you made to the RFx Routing tab, click Save. To undo the changes that you made to the RFx Routing tab while it was in edit mode, click Cancel.

To delete a rule:

1. Open a supplier, and then click the RFx Routing tab.

2. Select the routing rule that you want to delete.
3. Click Remove button.

To change the default recipient:

1. Open a supplier, and then click the General Info tab.
2. Click Edit.
3. Select the Default RFQ Recipient from the list of contact users.
4. Click Save.

## Defining Manufacturer and Commodity Offerings

Each supplier can have different manufacturer and commodity offerings.

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

RFQs can be sent to suppliers based on the type of manufacturer or commodity offerings they have.

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

- Approved
- Strategic
- Offered Active
- Offered Inactive

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

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

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### Creating a New Manufacturer Offering

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



If you choose to add a manufacturer offering by Geography, rather than Ship To location, an offering is only added if there is a Ship To location defined in that particular region.

For example, assume that the following are the only Ship To locations defined in the system:

- Santa Clara, CA, USA
- Los Angeles, CA, USA
- Bangalore, India, Asia

If a user uses the Geography option and selects *San Jose, CA, USA* as the geographical location, the system does not add any rows to the Manufacturers table, because there are no Ship To locations defined for that specific location. On the other hand, if the user selects *CA, USA* as the location, the *Santa Clara, CA, USA* and *Los Angeles, CA, USA* Ship To locations are added, because those locations are included in the broader region of *CA, USA*.

To create a new manufacturer offering in the Web Client:

1. Open the supplier you want to work with, and click the Manufacturers tab.
2. Click Add.
3. For Manufacturers, click the button to select one or more manufacturers. You can add manufacturers by using the drag and drop feature or by double-clicking the row of the manufacturer to be added.
4. Select the appropriate option to base the offering on the geographic location or ship-to locations
5. Follow either step 5.a or 5.b, depending on the option you chose in the previous step.
  - a. If you selected Ship To option, click the button next to the Ship To field to select the locations.
  - b. If you selected the Geography option, click the button to select the geographical area.
6. Select a supplier rating (for example, Approved or Offered Active).
7. Click Add. The new manufacturer line card definition appears in the list.

### Creating a New Commodity Offering

Before you can specify commodity offerings for a supplier, commodities must be defined in your Agile PLM system. See ["Creating Commodities"](#) on page 7-4.

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

Similar to manufacturer offerings, if you choose to add a commodity offering by Geography, rather than Ship To location, an offering is only added if there is a Ship To location defined in that particular region. See the example in ["Creating a New Manufacturer Offering"](#) on page 7-12. for more information.

To create a new commodity offering in Web Client:

1. Open the supplier you want to work with and select the Commodities tab.
2. Click Add.
3. For Commodities, click the button to select one or more commodities. You can add commodities by using the drag and drop feature or by double-clicking the row of the commodity to be added.
4. Select the appropriate radio button to base the offering on the geographic location or ship-to locations
5. Follow either step 5.a or 5.b, depending on the option you chose in the previous step.
  - a. If you selected Ship To option, click the button next to the Ship To field to select the locations.
  - b. If you selected the Geography option, click the button to select the geographical area.
6. Select a supplier rating (for example, Approved or Offered Active).
7. Click Add. The new commodity line card definition appears in the list.

### Updating Manufacturer and Commodity Ratings

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

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

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To update manufacturer and commodity ratings in the Web Client:

1. Open the supplier you want to work with, and click the Commodities tab or Manufacturers tab.
2. Click in the Ratings column of the row that needs to be updated.
3. Select a new rating from the dropdown list.
4. If desired, select any other rows that need to have their rating similarly updated. Use the Fill-up/Fill-down options by clicking the More button.

## Working with the PSRs Tab

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

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

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

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



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## Changes, Discussions, and Attachments

This chapter provides information about changes, discussions, and attachments as they relate to PCM.

### Item and Response Changes

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

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

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

To view unapplied item changes:

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

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

To view item changes:

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

3. Select Items Added, Items Deleted, or Items Modified from the Views dropdown list to view the added, changed, or deleted items in the project.

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**Note:** You can view the item changes made in the project since the project was created.

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To view response changes:

1. Open a project and select the Changes tab.
2. Click the Supplier Response Changes tab to view response changes. The table displays response changes made in the project.
3. Click the item number to edit the project item information.

## Discussions

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

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

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

## Adding Discussions

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

To create and add discussions:

1. Open the object, e.g. sourcing project, and select the Discussions tab.
2. Click Add. A new row appears in the Discussions table.
3. Click the button. The *Create New* dialog appears.

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**Note:** You can also add an existing discussion by clicking the button and searching for it.

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4. Select the type of discussion from the Discussion Type field.
5. Enter the subject in the Subject field.
6. Enter discussion text in the Message field.
7. Select the priority of the message from the Priority dropdown list.
8. Click the button next to the Notify List field, and select the names of recipients.
9. Click Add. Users in the Notify List are sent a notification for the discussion.

## Replying to Discussions

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

You can access a discussion by clicking on the Discussion tab of the Agile PLM object, e.g. RFQ, that is associated to the discussion. Alternatively, you can access the discussion from your Notifications inbox. From within your inbox, click the subject in the *Regarding* column to open the discussion.

To reply to discussions:

1. On the Discussion tab of the discussion object, click Reply. The *Reply to Discussion* dialog appears.
2. Enter the reply in the Message field.
3. To change the list of recipients, click the button next to the Notify List field. Select the names of recipients.
4. Click Send.

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**Note:** You can send any number of replies in a discussion.

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## Removing Discussions

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

To remove discussions:

1. Open the project, and click the Discussions tab.
2. Click the row selection cell for the discussion that you want to remove.
3. Click Remove.

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

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## Attachments

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

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

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

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

## Project Objects that Can Have Attachments

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

- Items
- Manufacturer parts
- RFQs

## Working with Attachments

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

For example, if the file is a Microsoft® Excel (.XLS) file, you need to have Microsoft® Excel installed to view the file. The Attachments tab information shows the file description, name, version, type, and size, as well as the dates the file was modified and viewed.

For more details about working with attachments, see *Getting Started with Agile PLM*.

## Viewing Attachments

You can either view a file attachment from Agile Web Client, or you can download it to your computer for viewing or editing.

To view an attachment in the AutoVue for Agile viewer:

1. Open the object for which you want to view an attachment.
2. Display the Attachments tab.
3. Select the row of the file that you want to view.
4. Click View > View. The file is opened in the AutoVue for Agile viewer.

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**Note:** AutoVue for Agile viewer does not support all file types. An error appears if you attempt to view an unsupported file type.

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To save the attachment:

1. Open the object for which you want to view an attachment.
2. Display the Attachments tab.
3. Click the Get button for the attachment you want to download. Use can choose to use the Java tool or the standard browser capabilities to download the file.
4. Save the file to the desired location.

For more information on working with attachments, see *Getting Started with Agile PLM Guide*.



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## Managing Price Information

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This chapter provides information about managing price information.

### About Contract Management

Contract Management is a key component of managing product costs. To effectively reduce the cost of products, you should be able to assess and leverage price and terms information as established throughout the organization. Agile PCM provides you with a single controlled process for doing this.

You can store information about prices for items. From the sourcing project, you can publish price information to the Item Master. Users in departments throughout the organization can access this information to use in finalizing the prices for an item or manufacturer part. You can share the new price information from one company with other companies as part of the process of finalizing prices.

For example, the price manager might get information from a supplier about a price change for a particular item (a new, reduced item price). The price manager changes the price information by creating a new price line, publishes it to the repository, and routes it through the workflow for signoff.

Price objects are created automatically when you perform the following actions in a sourcing project:

- Publish prices - By publishing prices from a project to the Item Master, you automatically create price objects associated with Item Master items and manufacturer parts. You can select which type of price objects to create, such as contracts, published prices, or quote histories. You can publish prices in Authoring or Redline mode; if you use Redline mode, you must specify a PCO. For more information about publishing prices, see ["Publishing Prices for Items and Manufacturer Parts"](#) on page 5-21.
- Lock or close an RFQ response line - When you lock or close a response line in an RFQ, you automatically create a snapshot of that quoted price by generating a Quote History object.

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**Note:** Whether or not Quote Histories are created automatically depends on how the SmartRule called Auto Publish Quote History is configured. If the SmartRule is set to Disallow, Quote Histories are not automatically created when you lock or close an RFQ response line. For more information about SmartRules, see the *Agile PLM Administrator Guide*.

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Additionally, you can manually create a new price in for an item or manufacturer part in the Web Client. For more information, see "[Creating Prices](#)" on page 9-5.

## Pricing Overview

This section covers the following topics:

- Objects in Price Routines
- Associated Roles and Privileges
- Price Types

### Objects in Price Routines

A price routine is the flow of the price information of any item or manufacturer part. Pricing information is provided by the supplier. You can publish this information to the respective item or manufacturer part. A price routine involves:

- Prices
- Price Lines
- Price Change Orders (PCOs)

#### Prices

The Price is an object where you record the price and terms conditions of items and manufacturer parts with relation to the supplier, customer, program, and manufacturing site. You create prices for items or manufacturer parts. The uniqueness of a price is controlled by the item/manufacturer part number and item revision number (if applicable) combined with the supplier, customer, program, and the manufacturing site.

A price is a routable object, so it follows a workflow via price change orders. A price object can have multiple price lines. You can add it to any PCO without having to create a new PCO.

The Price objects have certain limitations:

- A price object can have only one pending PCO. You cannot create PCOs for a price object when a PCO for the same price object already exists and is pending.
- A price line cannot be added to a price object that already has a pending PCO.
- The (Restricted) Price Collaborator role is intended for supplier users. Price Collaborators can create published prices and PCOs for their items and manufacturing parts only.

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**Note:** Price Collaborators can only create prices for only their suppliers.

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#### Price Lines

Price lines contain the core price information about an item or manufacturer part, which is unique by quantity, Ship To location, and Effectivity Period. You can create any number of price lines within a price object, but they should be uniquely identified. Price lines share the general information that defines the price object.

Price lines have certain limitations:

- Users with the Price Administrator or Price Manager role can create price lines, since they are also responsible for creating prices.
- Price collaborators can create price lines for their items and manufacturing parts only.

### Price Change Orders (PCOs)

A Price Change Order, or PCO, is a process for revising, or deleting, the price information about an object. A PCO follows a workflow from the Preliminary through the Signoff phase. A PCO can have multiple Price objects, and a price can be added to any existing PCO. You can use a PCO to redline the price line information of any price object.

## Associated Roles and Privileges

You can control price information for items in Agile PCM through three important roles. The privileges for these roles are assigned by the Agile administrator.

The Contract Management related roles are:

- (Restricted) Price Collaborator - Users with this role have limited privileges for managing pricing information through price and price change order creation. This role is typically provided to suppliers.
- Price Administrator - Users with this role have privileges allowing them to control contract management activities, including the price change order process. Users with this role are also called as Approvers. They have the privilege to review and release PCOs.
- Price Manager - Users with this role have privileges for managing pricing information through price and price change order creation. These users cannot review or release PCOs, and so they are not the approvers of PCOs.

## Price Types

The Price base class is divided into two classes, Quote Histories and Published Prices. These classes are further divided into the following three subclasses:

- Contract - This is a subclass of the Published Prices class. Contract prices are prices provided by the supplier for a specific item or manufacturer part. This price information applies only for the specified duration and can apply to any project.
- Published Price - This is a subclass of the Published Prices class. Published prices are prices provided by the suppliers in response to an RFQ and published from the project. The published price information can also be used in other projects.
- Quote History - This is a subclass of the Quote Histories class. Quote history prices are the stored prices from supplier responses that you can use. Any change in the response line of an RFQ is stored in the historical response and can be used at any time.

Note the following points about price types:

- An item cannot have more than one price of the same type subclass with the same unique keys, i.e. supplier, customer, program, etc.
- Only prices of type contract and published price can be changed using a PCO.
- To create additional price types, the Price base class can be subclassed further into additional classes. Your Agile administrator can create multiple price types to group different prices according to business logic.

## Managing Price Information

Managing price information is a critical task for any organization. The price administrator should closely follow the pricing information about items and update it in the Item Master.

This section covers the following topics:

- Accessing Price Information
- Creating Prices
- Price Page Tabs

### Accessing Price Information

Each item or manufacturer part has associated price information. Any number of price objects can be created for an item, and any number of price lines, which are identified by their unique combinations of ship-to location, ship-from location, quantity, and effectivity period, can be created in a price object. The Prices tab of an item or manufacturer part lists all prices for that item or part.

To access the price information for an item:

1. Open an item and select the Prices tab. The prices are displayed (if any).
2. Click the Price Number in a row. It opens a General Information page of the Price. Go to Price Lines tab to view more details.

### Price Fields

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

Field	Description
Item Number ( <i>or Mfr. Part Number</i> )	Identification number of the item or manufacturer part.
Mfr. Name ( <i>if price is for Mfr. Part</i> )	Name of the manufacturer who makes the part.
Item Rev ( <i>if price is for an Item</i> )	Revision number of the part.  Note: This field is displayed, even if the user does not have privileges to read the item itself.
Supplier	Supplier who submitted the price for the item or manufacturer part, or the supplier for which a price is created.
Price Type	Type can be Quote History, Published Price, Contract, or a customized price subclass.
Number	Unique identification number for the price.
Description	Brief description of the price terms.
Lifecycle Phase	Current state in the price object workflow.
Owner	By default, the user who created the price. The ownership of a price can be transferred to another user who has the same privileges.

Field	Description
Customer	If a Customer is selected, the price will only apply to that customer.
Program	If a Program is selected, the price will only apply to that program.
Manufacturing Site	Location in which the item or part is manufactured.
Authorized Suppliers	Suppliers other than the primary supplier who are authorized to use this price. Authorized suppliers have the same viewing privileges as the primary supplier for the price.
Part EOL Date	End of life date for the part or item, as given by the supplier.
Min	Minimum quantity that should be ordered from the supplier
Mult	Number of units in a package
NCNR	Non-Cancelable Non-Returnable. Applies to an item. NCNR can be Yes or No, depending on the supplier.
Inventory	Available stock.
Version	Version of the price. A new version of a price is created when that price is part of PCO that was released.
Version Release Date	Version release date.
Effectivity Date	Date the price goes into effect.
Allow Qty Breaks	Whether or not to allow quantity breaks for the manufacturer part or item at the given price. Can be Yes or No.
Contract Number	Number of a contract or document supplier by the supplier.
Functional Team(s)	Group(s) of users and/or user groups who work as a team while performing specific job functions.

## Creating Prices

Agile PCM creates prices automatically when you publish prices from a project to the Item Master or when you lock or close an RFQ response line, if the Auto Publish Quote History SmartRule is set to "Allow".

You can also use the Price Creation dialog to create prices for items and manufacturer parts.

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**Note:** To create prices, you must have the Create privilege for price objects. Agile provides two roles that let users create prices - Price Administrator and Price Manager. On the supplier side, the same privileges are available via the Restricted Price Collaborator role.

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To create a price for an item or manufacturer part:

1. Open the item or manufacturer part.
2. Click Actions > Create New > Price. The *Create New* dialog appears.

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**Note:** Alternatively, you can choose to create a new price using the Create New button in the top menu bar.

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3. Select a price type from the Type dropdown list. Once you select a price type, additional fields appear on the page.
4. A unique, system generated number may automatically be filled in the Number field on the basis of Price Type you selected. You may also be able to modify this number, give one of your own or click to generate a new number.

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**Note:** Auto-numbering settings, such as the automatic generation of an AutoNumber, are set by the Agile administrator. These settings can limit the options you have for the Number field. See the *Agile PLM Administrator Guide* for more information.

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5. Select the Part Type, e.g. Item or Manufacturer Part, from the dropdown list.

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**Note:** The Part Type and Item or Manufacturer Part fields are automatically filled in if you create the price from within an item or manufacturer part.

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6. Type in the Item or Manufacturer Part or click the icon to search and select an item or manufacturer part from the search palette.

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**Note:** As you type in the item/manufacturer part, if there are multiple entries that match what you have typed so far, a dropdown list appears from which you can select a value.

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7. If you had selected Item from the Part Type list, select the revision from the Rev dropdown list.
8. If you had selected Manufacturer Part from the Part Type list, select the Manufacturing Site from the dropdown list.

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

9. Type in the supplier or click the icon to search and select Suppliers through *Suppliers* search palette.

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**Note:** As you type in the item/manufacturer part, if there are multiple entries that match what you have typed so far, a dropdown list appears from which you can select a value.

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10. Select a Program from its dropdown list.

If a program is selected, the item price information applies only to that program. If All is selected, then the item price information applies to all programs.

11. Select a Customer from its dropdown list.

If a customer is selected, the item price information applies only to that customer. If All is selected, the item price information applies to all the customers.

12. Click Save. The new price's cover page appears in edit mode.

13. To add a new price line, go to the Price Lines tab. For more information about adding price lines, see ["Creating Price Lines"](#) on page 9-8.

14. To add a new attachment, go to the Attachments tab. For information about adding attachments, see *Getting Started with Agile PLM*.

## Price Page Tabs

The tabs on the Price page store information about price and term attributes. Attachments and change orders related to the price can also be found on the Price page tabs. The following table describes each tab on the Price page.

General Information	This tab displays basic information about the price, including information controlled by the workflow, item and manufacturer part attributes, and supplier-supplied information. Click Edit to edit the information on this tab.
Changes	<p>This tab displays pending and historical changes that affect the price. Any unreleased price change orders (PCOs) where this price is listed on the Affected Prices tab are listed in the Pending Changes table. The Change History table displays any released PCOs where this price is listed on the Affected Prices tab. Agile PCM automatically fills in the information on this tab.</p> <p>The changes listed are those that apply to the revision specified in the Rev field at the top of the page.</p> <p><b>Note</b> Although its name is similar, the History tab shows all actions taken on a price, while the Change History table on the Changes tab lists released and canceled changes for the price. The Changes tab is not displayed if the price type is Quote History.</p>
Price Lines	<p>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.</p> <p>Overlapping price lines can occur when all or some of the effectivity periods of one price line fall within the effectivity periods of a second price line, and all other attributes are the same. Check with your Agile administrator to determine if overlapping price lines have been set as allowed using SmartRules.</p>
Attachments	This tab lists the files and URLs attached to the price. For more information, see <i>Getting Started with Agile PLM</i> .
History	This tab shows a summary of actions taken on the price object. History records are not captured for preliminary prices.

## Managing Price Lines

Price lines contain unique price information about the item. Price lines store information about prices and terms that apply to specific quantity breaks.

You can change price lines after they are published through price change orders (PCOs). However, you can also redline price information, which is sent for review and

release before you use the changed information. For more information about redlining, see "[Redlining Price Information](#)" on page 10-5.

You can see price line information on the Price Lines tab of the price object. The price line information is created or modified in the Add Price Line dialog.

## Creating Price Lines

You create price lines from the Price Lines tab of a price.

**Note** Users with the Price Administrator and Price Manager roles can create price lines for any item or manufacturer part. Users with the Price Collaborator role can create price lines only for items or manufacturer parts they supply.

To add price lines:

1. Open a price object and go to Price Lines tab.
2. Click Add. The *Add Price Line* dialog appears.
3. Enter the mandatory fields:

Select the Ship To locations from its dropdown list.

1. Select a date from the Price Effective From Date calendar.

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**Note:** Overlapping effectivity periods for a price line are allowed if the SmartRule, Allow Overlapping Price Effectivity Periods, is enabled.

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2. Enter Quantity for which the price line information applies in the Qty field.
3. Select the supplier currency from the Currency Code dropdown list.
4. Enter the optional data  
Change the currency conversion date, if necessary, in the Conversion Date calendar.
  4. Enter the material price per unit in the Material Price field.
  5. Enter the non-recurring cost in the Non Recurring Cost field.
  6. Enter the lead time for supply in the Lead Time field.
  7. Select the Transportation Terms from the dropdown list.
  8. Select the Country of Origin of the item from the dropdown list.
  9. Enter any comments or additional information in the Price Line Notes field.

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**Note:** Any flex fields that have been enabled will also be displayed.

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5. Click Finish.

## Modifying Price Lines

You can modify the price line information on the Price Lines tab.

To modify the price line information:

1. Open a price object and go to Price Lines tab.



2. Edit the price line information in the Price Line table by directly editing the field.
3. Click Save.

## Removing Price Line Information

You can remove price line information from the Price Lines tab.

To remove the price line information:

1. Open a price object and go to Price Lines tab.
2. Select the row(s) of the price lines(s) you want to remove.
3. Click Remove.

## Importing Price Lines

You can import the Price Lines from the responses submitted in an Excel workbook. The responses in a workbook belong to a particular Price object. When you import them, the system appends the associated price objects, and not elsewhere.

For complete details on import process, see *AgileImport/Export Guide*.

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**Note:** The number of price lines that can be imported in a single import process depends upon the system/server configuration. See *Capacity Planning Guide* for more on server sizing.

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**Important:** If the number of price lines is high, Agile recommends you to split them into multiple Excel workbooks for import. In the Authoring mode, each workbook should not exceed 5000 price lines, and in the Redlining mode, it should be less than 1000.

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## Price Change Orders

This chapter provides information about working with price change orders (PCOs).

### About Price Change Orders

You control any changes that need to be made to prices through a price change order (PCO). PCOs are routed through workflows, from the Pending phase through the Released phase. Through a PCO, you can release a price, redline the price information, and track the history of the price information.

You create PCOs for price objects only. A PCO can contain multiple prices that can be associated with different items, but a price cannot contain more than one pending PCO.

### Managing PCOs

Price change orders control changes to the prices of items or manufacturer parts. The price administrator can create PCOs, and the price collaborators can publish the prices of items from the response lines of RFQs.

This section covers the following topics:

- Creating PCOs
- Adding Price Objects to PCOs
- Workflows
- Adding Objects to the Relationships Tab

#### Creating PCOs

You can create PCOs from prices or from the Create New menu on the main menu bar. When you create a PCO from the Actions menu of a price, the price is associated with the PCO by default. When you create the PCO from the Create New menu, you must associate the price with the PCO manually.

To create a PCO from the Create New menu:

1. Click Create New > Changes > Price Change Orders. The *Create New Price Change Orders* dialog appears.
2. Select the Type of PCO from the dropdown list.
3. A unique, system generated number may automatically be filled in the Number field on the basis of Price Type you selected. You may also be able to modify this number, give one of your own or click to generate a new number.

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**Note** Auto-numbering settings, such as the automatic generation of an AutoNumber, are set by the Agile administrator. These settings can limit the options you have for the Number field. See the *Agile PLM Administrator Guide* for more information.:

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1. Click Save. The cover page of the newly created PCO appears.
2. Select a category from the Change Category dropdown list.
3. Enter the Description of Change and the Reason for Change in the corresponding fields.
4. Select a Reason Code, Workflow, and Price Admin from the corresponding dropdown lists.
5. Click next to the Originator. It opens a search palette to find and select an originator from the list of users. By default, the originator is the user who creates the PCO.
6. Change the Date Originated using the calendar to stamp the date of origination of the PCO, if it is different from today's date.
7. Click next to the Product Lines to select the affected product lines.
8. Click Save. The updated cover page appears.

Add affected prices or attachments to the PCO by clicking on the corresponding tabs.

To create a new PCO from a Price object:

1. Open a Price object.
2. Choose Actions > Add to Change > Create New. The *Create Changes* window appears.
3. Select a PCO from the Change Type dropdown list.
4. Click to have a system-generated unique number inserted in the Number field. You can also choose to enter in your own unique number.

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**Note:** Your Agile administrator may have modified the way that the Number of a PCO is set. AutoNumbers may not be available or it may be required. Check with your administrator for more information.

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5. Click Save.
6. To add details to the newly created PCO, follow *steps 4 through 11* from the preceding procedure, *To create a PCO from the Create New menu*.

### Cover Page Tab

This tab displays general information about the PCO, including the unique identification number of the PCO, the current workflow status of the PCO, the description of the change, and the reason for the change.

You can edit the Cover Page tab by clicking the Edit button.

## Affected Prices Tab

The Affected Prices tab displays information about the prices associated with the PCO. You can make changes to the price information through redlining. You can see the history of the redlined information on this tab.

You can click the Price Number in the table to view the price information.

You can redline price information on this tab. For information about redlining, see Redlining Price Information on page 141.

## Adding Price Objects to PCOs

You can add any number of price objects to a PCO, but a price object can be associated with only one pending PCO. Once a price is published, you must create a PCO to make even a small change in the price information.

You can add an existing price to the PCO. Alternatively, you can create a new price for any item or manufacturer part and add it to the PCO. You can also create price lines for the item or manufacturer part, but this is not required.

To add existing prices to a PCO:

1. Open a PCO and select the Affected Prices tab.
2. Click Add. A new row appears with an editable Price Number field.
3. Type in the Price Number directly or search for it by clicking . For information about searching for Agile objects, see *Getting Started with Agile PLM*. Alternatively, you can create a new price object, if needed, by clicking .

If you try to add a price object that already has a pending PCO, the attempt to add fails and an error message appears.

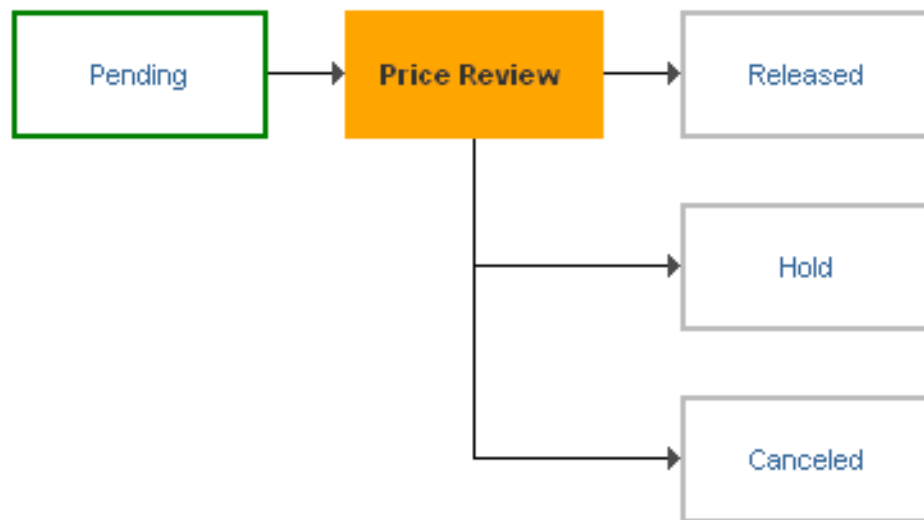
## Applying the Effective Date

You can apply the effective date of the price using the *Auto Populate Effective Date* dialog.

To apply the effective date:

1. In the Affected Prices tab of a price object, select the row(s) of the price rows in the table.
2. Click Auto Populate Effective Date. The *Auto Populate Effective Date* dialog appears.
3. Select the date from the Enter a Date calendar.
4. Check Apply to All Items to apply the selected date to all the selected price objects.
5. Click Set Date.

## Workflows



The Workflow tab displays information about the workflow of the PCO in the form of a flow chart. A PCO begins in the Unassigned phase and ends in the Released phase. The price information in the PCO takes effect when the PCO reaches the Released phase. However, the PCO can be canceled or put on hold during any phase.

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**Note:** Actions are not captured on the History tab for unassigned PCOs.

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A user with the appropriate role submits the PCO and forwards it to the next phase by notifying the price reviewer. The price reviewer receives the notification, reviews the price information, makes any necessary modifications, and then notifies approvers, observers, and acknowledgers. They review the price information sent by the price reviewer, make any necessary changes, and pass it on to the next stage for implementation.

You can view sign off history and the workflow diagram for the PCO in the Workflow tab.

Only price administrators, who are also approvers, can approve or reject a PCO. Observers are those who analyze the PCO and give their comments. Acknowledgers are those who need to be aware of the change. Notifications regarding the PCO can be sent to other users such as suppliers and customers.

Functional teams help determine which users should be used as approvers, acknowledgers, and observers. You can add or remove approvers, acknowledgers, and observers by clicking Add Reviewers or Remove Reviewers. The reviewers can approve, acknowledge, or reject the PCO by clicking the Approve, Acknowledge, or Reject buttons.

The workflow may have multiple phases depending on your requirements. The Agile administrator can customize the workflow. For more information about workflows, including functional teams, see *Getting Started with Agile PLM*.

## Adding Relationships

In the Relationships tab, you can add the information about objects that affect the PCO status and add Rules to those objects. You can add multiple objects but objects in their Released state cannot be added to either table.

To relate existing objects to a PCO:

1. Open a PCO and select the Relationships tab.
2. Click Add > Search. The search window appears.
3. Search for and select object(s). Drag and drop (or double-click) objects you want to add into the Relationships table.

## Applying Relationship Rules

Once you have added relationship objects, you can select them one by one and add their relationship rules.

## Redlining Price Information

You can publish price information to the Item Master in two modes-Authoring and Redlining.

- Authoring mode allows you to publish price information directly to the Item Master. You can publish prices in Authoring mode from the Analysis tab of a sourcing project and from the Response tab in an RFQ. In Authoring mode, changes do not go through an approval process.
- Redlining mode keeps track of all the previous price information. You redline price information when you want to make changes to the published information, but want to go through an approval process. You use PCOs to deal with changes to prices that have been published. A PCO contains multiple price objects, which in turn contain multiple price lines. You can redline the price line information of any price object in the PCO.

You can also add price lines to the price object or delete them in Redline mode. Adding price lines in Redline mode is similar to adding price line information to the price object.

Price managers submit the redlined price information to price administrators to approve (Price Review stage) and release. The price administrators review the redlined price information and release the PCO with or without the changes.

To redline price lines:

1. Open a PCO and select the Affected Prices tab.
2. In the Affected Prices table, select the row of the price that needs to be redlined. The price lines for that price are displayed in the Redlines table below.
3. In the Redlines table, click Add. The *Add Price Line* dialog appears.
4. Edit information as required.
5. Click Finish. The newly added price line appears in the Redlines table in red.

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**Note:** You can view the original information as it was originally published from the redline dialog by selecting the price lines and clicking the Undo Redlines button.

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### **Deleting Price Lines in Redlining Mode**

You can delete a price line and send it for price review. The approvers can accept or reject the deletion.

To delete the price line in Redlining mode:

1. Open a PCO and select Affected Prices tab.
2. In the Affected Prices table, select the row of the price that has a price line that must be removed. The price lines for the selected price are displayed in the Redlines table below.
3. In the Redlines table, select the row of the price line that must be removed.
4. Click Remove.

The system keeps the deleted price line in the table, but strikes it through with a red line. You can undo the "deletion" by selecting the row and clicking the Undo Redlines button.



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## PCM Use Cases

There are four main use cases for PCM functionality. They are as follows:

- New Product Introduction (NPI) or New Product Development (NPD)
- Reprice Management
- Electronics Manufacturing Services
- Commodity Management

### New Product Introduction

The New Product Integration/Development (NPI/NPD) process consists of all the work an organization puts into preparing a new product for the market. This process includes the development, prototyping, and manufacturing of the product. Normally there are four phases in this process: physical design, prototype manufacture, pre-production, and volume ramp. PCM can be used during the NPI process to gather pricing information for the new product.

In the NPI use case, the general procedure is as follows:

- Design product in Product Collaboration (PC).
- Determine parts and add them to PC.
- Create sourcing project.
- Add BOM to sourcing project.
- Send sourcing project to suppliers via RFQ.
- Get prices at part level.
- Negotiate prices.
- Publish prices to PC.

### Reprice Management

Reprice management is a common PCM use case that allows you to refresh prices, as needed. Prices change for many reasons, including:

- environmental variables
- market
- demand
- sales

- time
- quantity

During price refreshes, PCM helps maintain BOM accuracy across a multi-tier network of manufacturing partners and suppliers. It allows for efficient renegotiation and resetting of prices.

In the Reprice Management use case, the general procedure is as follows:

- Create sourcing project.
- Add BOM to sourcing project.
- Do price lookup for existing published prices for BOM items.
- Send sourcing project to suppliers via RFQ.

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**Note:** Usually, the RFQ is sent to the suppliers that were used previously, however, sometimes the RFQ is sent to additional suppliers for new quotes. This is often the case when there is a top-level mandate for price reduction.

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- Get prices at part level.
- Negotiate prices.
- Publish prices to PC.

## Design for Cost and Supply

Electronic Manufacturing Services (EMS) is a term used for companies that design, test, manufacture, distribute, and provide return/repair services for electronic components and assemblies for Original Equipment Manufacturers (OEM). PCM allows an EMS company to start with PCM and work with design partners to design and build a BOM.

In the EMS use case, the general procedure is as follows:

- Start with top-level idea or design with some minimal part requirements.

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**Note:** For example, you may know that you want to use a specific part, but have not determined the rest of the BOM items.

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- Collaborate with design partner to design a product and build its BOM.
- Create sourcing project.
- Add BOM to sourcing project.
- Send sourcing project to suppliers via RFQ.

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**Note:** Partners are often provided the Content BOM view in the RFQ, which allows them to see the complete, expanded BOM view

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- Get prices at part level.
- Negotiate prices.

- Publish prices to PC.

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**Note:** You may choose not to publish the prices to PC and instead keep the prices in the sourcing project. This is often done with manufacturer BOMs.

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## Commodity Management

A commodity is a good, such as a resistor or diode, for which there is demand, but which is supplied without qualitative differentiation across a market. The manufacturer of commodity goods is not considered to be very important, since the commodity is similar regardless of who produces it. Commodity management is the process of developing a systematic approach to the entire usage cycle for a group of items. PCM allows you to consolidate commodity sourcing and reduce commodity prices.

In this use case, the general procedure is as follows:

- Commodity manager is informed of a commodity that is needed.
- He/she checks where the part is used in other BOMs and then uses a sales tool to see future demand forecasts.
- Based on the forecasts, the commodity manager creates a sourcing project for the target amount of the commodity.
- Add commodity part group to sourcing project.
- Send sourcing project to suppliers via RFQ.
- Get prices at part level.
- Negotiate prices.
- Publish prices to PC.



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## Configuring Product Cost Management

This section provides information about nodes in the Product Cost Management folder under System Settings.

### Product Cost Management Configuration Checklist

Use the following checklist to configure Agile PLM server settings for Product Cost Management:

- Define your company profile - Specify the name, address, phone number, URL, and the corporate currency for your company. For more information, see the *Agile PLM Administrator Guide*.
- Define currency exchange rates - Suppliers may quote prices in different currencies. You must maintain a table of currency exchange rates so that you can view normalized prices that have been converted to the project currency. For more information, see the *Agile PLM Administrator Guide*.
- Define your company's Ship To locations - Ship To locations are essential to take advantage of Product Cost Management features. For more information, see ["Ship To Location"](#) on page B-2.
- Configure SmartRules - Make sure you properly configure SmartRules related to price fields, effectivity periods, automatic publishing of quote histories, and commodities. For more information, see the *Agile PLM Administrator Guide*.
- Configure the Product Cost Management class - Configure the Agile PLM classes for Product Cost Management. For more information, see ["Configuring Product Cost Management Classes"](#) on page B-7.
- Configure the Sourcing Projects class - There are several things you can do to customize the Sourcing Projects class, which affects all of its subclasses. For example, you can enable flex fields on different tabs, configure AML tab attributes to pull values from other Item and Manufacturer Part attributes, and define price adders and non-material price fields for RFQ responses. For more information, see ["Configuring Product Cost Management Classes"](#) on page B-7.
- Define Suppliers - Define the suppliers with whom sourcing project managers and RFQ managers will be working. This may be the responsibility of another user, someone with the Organization Manager role. For more information about creating and managing suppliers, see *Getting Started with Agile PLM*.

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**Note:** Separately, supplier managers should define the contact users and line cards for their particular suppliers. Supplier users have restricted access to Product Cost Management functionality.

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- Define Supplier Offering Ratings - In the Agile PLM List Library, there is a list called Supplier Offering Rating, which is used to rate each supplier offering. You can customize the list of ratings. By default, the ratings are Approved, Strategic, Offered Active, and Offered Inactive. For more information, see the *Agile PLM Administrator Guide*.
- Define Product Cost Management Users and Roles - Define the users who will create and manage sourcing projects, RFQs, and prices. Assign those users appropriate roles, such as Sourcing Administrator, Sourcing Project Manager, RFQ Manager, and Price Administrator. For more information, see "[Product Cost Management Roles](#)" on page B-3. Make sure every user who will create sourcing projects has at least one authorized Ship To location. Otherwise, the user will not be able to move a project from Draft to Open status. For more information about the available PCM roles, see the *Agile PLM Administrator Guide*.
- Configure Administrator Privilege - In order to see the RFQ Terms and Conditions node on the Admin tab in Java Client, you must configure the Administrator privilege. This is covered in "[Configuring the RFQ Terms and Conditions Node](#)" on page B-4.
- Define new subclasses of the Sourcing Projects class - Agile PLM provides one subclass of the Sourcing Projects class called Sourcing Project, but you can extend Sourcing Projects and define any number of subclasses for specific types of projects. For more information, see the *Agile PLM Administrator Guide*.
- Configure BOM Filters - In order to use the BOM filtering feature in PCM, you must create and configure certain attributes in Data & Workflow Settings > Classes > Parts. For more information about how to use this feature after it is set up, see Configuring BOM Filters on page 168.
- Establish Relationships between Objects - For information about how to establish relationships between fields, refer to *Getting Started with Agile PLM*, "Working with Business Objects" chapter.

## Ship To Location

Ship To locations are important for differentiating sourcing projects and for disseminating requests for quotes (RFQs) to suppliers.

To add a Ship To location:

1. Under System Settings > Product Cost Management, double click Ship To Location. The *Ship To Locations* window opens.
2. Click New icon. The *Create Ship To Location* dialog box appears.
3. Type the name and location code of the new Ship To location. Fill in other fields as needed.
4. Click OK. The new Ship To location appears on the list.

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**Note:** Sourcing project managers must have at least one Ship To location defined in their user profiles. Otherwise, the projects they create cannot be opened. Similarly, each sourcing project must have a specified Ship To location. A project's Ship To location determines how RFQs are disseminated to suppliers based on their line cards.

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**Note:** When a Ship To Location is being used (referenced to) in any Sourcing Project, be the project in Draft or Open stage, it cannot be deleted in Java Client. When you attempt deleting, system issues a warning message "Fail to delete Ship To; one of the Ship To(s) is referenced to other objects".

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## Configuring SmartRules For PCM

The following are PCM-specific SmartRules:

- Negative Value For Material Price Adder Fields - See "[Applying Price Adders to Responses](#)" on page 5-17.
- Zero Value For Material Price Adder Fields - See "[Applying Price Adders to Responses](#)" on page 5-17.
- Negative Value For Material Price Fields
- Zero Value For Material Price Fields
- Negative Value For Non-Material Price Fields
- Zero Value For Non-Material Price Fields
- DuplicateItemNumbers - See "[Adding Items to a Project](#)" on page 2-15.
- Auto Publish Quote History

See the *Agile PLM Administrator Guide* for more details about SmartRules.

## Product Cost Management Roles

Agile PLM provides pre-defined roles you can assign to Product Cost Management users. These roles grant users the privileges for working with sourcing projects, RFQs, prices, discussions, suppliers, customers, and PCOs.

Roles with names that start with the prefix (*Restricted*) are intended for Suppliers. For a complete list of the predefined Agile PLM roles, see the *Agile PLM Administrator Guide*.

---

**Note:** Although the Agile PLM administrator may not have assigned you the privileges needed to work with a sourcing project, other users with access to a project can share them with you, thereby granting you the same privileges that apply to the project and all the objects contained within it. However, you cannot access other projects that are not shared with you.

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## RFQ Terms and Conditions

You can limit a supplier's access to an RFQ until they electronically agree to RFQ Terms and Conditions that you specify in Java Client. The RFQ Terms and Conditions node must be enabled in Java Client, then you can set and store the content of the Terms and Conditions page.

To use the RFQ Terms and Conditions feature, you will need to complete several tasks.

Tasks to Enable RFQ Terms and Conditions:

1. Enable the RFQ Terms and Conditions node in Java Client. For a detailed description of this task, see ["Configuring the RFQ Terms and Conditions Node"](#) on page B-4.
2. Set up and enter the content of the RFQ Terms and Conditions that you want the supplier to read and accept. For a detailed description of this task, see ["Setting and Storing the RFQ Terms & Conditions Content"](#) on page B-5.
3. Make the Require RFQ Terms and Conditions attribute visible in the Sourcing Project class. For a detailed description of this task, see ["Making the Attribute visible in Sourcing Project class"](#) on page B-5.
4. Make the Require RFQ Terms and Conditions attribute visible in the Requests for Quotes class. For a detailed description of this task, see ["Making the Attribute Visible in Requests for Quote Class"](#) on page B-5.
5. Update Modify My Sourcing Project General Info privilege to include Applied To field value: *Sourcing Projects.Sourcing Project.Require RFQ Terms and Conditions*. For a detailed description of this task, see ["Adding criteria to Modify My Sourcing Project privilege"](#) on page B-6.
6. Update Read RFQs privilege to include Applied To field value: *Requests for Quote.RFQHeader.Require RFQ Terms and Conditions*. For a detailed description of this task, ["Adding Criteria to Read RFQs Privilege in Sourcing Project Manager Role"](#) on page B-6.
7. Update Read RFQs privilege to include the following Applied To field values: *Status Accept Date, Status Accept User, Status Status, and Status Supplier*. For a detailed description of this task, see ["Adding Criteria to Read Privilege"](#) on page B-7.

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**Note:** Optionally, you can make Terms mandatory at the project level.

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## Configuring the RFQ Terms and Conditions Node

In order to see RFQ Terms and Conditions node in Java Client, you must configure the user's Administrator privilege. By default, it is disabled.

For more information about the Administrator Privilege, and how Administrator nodes are made available to a user, see the *Agile PLM Administrator Guide*.

Configuring the Administrator Privilege

1. Go to Settings > User Settings > Privileges.
2. Double-click Administrator privilege key to open Administrator window.
3. Select Show All in Match If dropdown list and click Apply.
4. Double-click Administrator privilege line. The *Privilege:Administrator* window opens.
5. Click the Arrow button in the Applied To field.
6. Select the RFQ Terms and Conditions option in the choices list and move it to the Selected list. Click OK.
7. Make sure the Enabled field is set to Yes.
8. Click Save and Close.
9. Close the *Privileges for Administrator* window.



10. Log out of Java Client and log back in. You should see RFQ Terms and Conditions node under Settings > System Settings > Product Cost Management.

## Setting and Storing the RFQ Terms & Conditions Content

After you have enabled the RFQ Terms & Conditions node, you can set and store the content.

Create RFQ Terms & Conditions Content

1. Under Settings, expand System Settings node, and then the Product Cost Management node.
2. Double-click RFQ Terms and Conditions. The *RFQ Terms and Conditions* window appears.
3. Enter the content for your RFQ's Terms and Conditions in the text field.
4. Click Save followed by Close.

## Making the Attribute visible in Sourcing Project class

You must make the Require RFQ Terms and Conditions attribute visible in the Sourcing Project class General Information tab.

To make the attribute visible:

1. Double-click Settings > Data Settings > Classes.
2. Double-click Sourcing Projects class.
3. Double-click General Information in User Interface Tabs tab.
4. Go to Attributes: General Information tab and double-click Require RFQ Terms and Conditions.
5. Select Yes in the Visible field.
6. Click Save followed by Close.

To enable the attribute for search:

1. Double-click Classes in Settings > Data Settings.
2. Double-click Sourcing Projects class.
3. Double-click General Information in User Interface Tabs tab.
4. Go to Attributes:General Information tab and double-click Require RFQ Terms and Conditions.
5. Select Yes in Enable for Search Criteria.
6. Click Save followed with Close.

## Making the Attribute Visible in Requests for Quote Class

You must make the "Require RFQ Terms and Conditions" attribute visible in the Requests for Quote class.

To make the attribute visible:

1. Double-click Classes in Settings > Data Settings.
2. Double-click Requests for Quote class.
3. Go to User Interface Tabs tab and double-click Cover Page.

4. Go to Attributes:Cover Page tab and double-click Require RFQ Terms and Conditions.
5. Select Yes in the Visible field.
6. Click Save and Close.

## Bid Decision attribute in RFQ Responses

The List entries of Bid Decision attribute are pre-defined by Agile. You can neither add a new list item, nor modify or delete any.

To see the available list items:

1. In Request for Quote class, go to User Interface Tabs tab.
2. Double-click Responses row and go to Attributes:Response tab.
3. Double-click Bid Decision attribute.
4. In Attributes:Bid Decision window, click View Details button. The List:Response\_Bid\_Decision window opens.
5. Go to List tab to see the pre-defined entries.

## Adding criteria to Modify My Sourcing Project privilege

You need to add criteria to "Modify My Sourcing Project General Information" privilege.

To add criteria to Modify My Sourcing Project General Information Privilege:

1. Go to Settings > User Settings > Privileges.
2. Double-click All Privileges.
3. Type *Modify My Sourcing Project* in the Value field and click Apply.
4. Double-click Modify My Sourcing Project row.
5. Click the arrow button next to the Applied To field.
6. From Choices cell, pick Sourcing Projects.General Information.Require RFQ Terms and Conditions and move it in Selected cell.

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**Note:** If you do not find Sourcing Projects.General Information.Require RFQ Terms and Conditions in the Choices list, clear the 'Show visible attributes only' checkbox.

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## Adding Criteria to Read RFQs Privilege in Sourcing Project Manager Role

To add criteria to Read RFQs Privilege in Sourcing Project Manager Role:

1. Double-click Roles in Settings > User Settings.
2. Type *Sourcing Project Manager* in the value field and click Apply.
3. Double-click Sourcing Project Manager.
4. Go to Privileges tab.
5. Double-click Read RFQs in Name column.
6. Click the arrow button next to the Applied To field.

7. From Choices cell, pick Requests for Quote.RFQHeader.Require RFQ Terms and Conditions and move it to Selected cell
8. Click OK.

## Adding Criteria to Read Privilege

To add criteria to Read Privilege:

1. Double-click Read privilege key in Settings > User Settings > Privileges.
2. Type *Read RFQs* in the Value field and click Apply.
3. Double-click Read RFQs.
4. Click the arrow button next to the Applied To field.
5. From Choices cell, pick the following and move them to Selected cell
  - Requests for Quote.Terms and Condition Status.Accept Date
  - Requests for Quote.Terms and Condition Status.Accept User
  - Requests for Quote.Terms and Condition Status.Status
  - Requests for Quote.Terms and Condition Status.Supplier
6. Click OK.

## Configuring Product Cost Management Classes

This section describes ways to configure Product Cost Management specific Agile PLM classes. For details on how to configure Agile PLM classes, see the *Agile PLM Administrator Guide*.

Product Collaboration and Product Cost Management automatically exchange data between the Item Master and Sourcing Projects. If your Agile PLM system has enabled custom flex fields, you must configure the fields consistently and map them correctly to make sure the data exchange occurs successfully between the Item Master and sourcing projects for those fields.

If you require help customizing your Agile PLM system, contact your Oracle Consulting - Agile Practice representative.

If your company has purchased both Product Cost Management and Product Governance & Compliance solutions, you must decide how to configure the Part Groups class.

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**Note:** If you have set the *Force Commodity and Part Family to be Identical* SmartRule to No, enable the *Make Available As* attribute in Class:Part groups > User Interface Tabs tab > General Info > Attributes:General Info tab (set Visible to Yes). The Make Available As attribute allows you to specify whether a part group is used as a commodity in PCM, a part family in Product Governance & Compliance (PG&C), or both.

---

## Disabling Flex Fields

Class	Flex Fields Supported
Page Two	Page Three
Sourcing Project	Yes
Yes	
Request for Quote	Yes
No	
RFQ Responses	No
No	

To avoid Create New Attribute buttons being disabled (grayed out) in an RFQ or Sourcing Project's Page Two, you must set the Page Two tab as invisible in Java Client.

The creation of a new flex field in Page Two or Page Three is not supported for Request of Quote and Sourcing Projects classes. By default, the Icon "New" in their corresponding Attributes Tabs is disabled (grayed out), however, the Page Two/Page Three attributes can be enabled or disabled in Java Client.

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**Note:** User-defined flex fields can be created in Prices and PCO classes.

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To make Page Two invisible in Java Client:

1. Go to Settings > Data Settings > Classes.
2. Double-click either Sourcing Projects or Request for Quotes class.
3. Click User Interface Tabs, and double-click Page Two.
4. Select the attribute Visible as No.
5. Click Save and Close.

## Tips for Configuring Flex Fields

When you configure flex fields to share data between the Item Master and sourcing projects, make sure you configure the fields consistently across classes. Otherwise, the *Map Data To* and *Publish* actions in a sourcing project may not work. If you map a list field to another list field, both fields must be configured to use the same list.

Remember to name flex fields consistently across classes. Before modifying the Name of an attribute, copy the original name into the Description field so that you can identify the original attribute name later.

Product Cost Management does not support user-defined flex fields, except for Product Collaboration classes such as Parts and Manufacturer Parts. Consequently, you cannot map sourcing project attributes to any user-defined flex fields.

## Pulling Data from Item Master Flex Fields into Sourcing Projects

Sourcing projects can contain items and manufacturer Parts added directly from the Item Master. They are added as a copy of the part in Item Master, and not as a

reference. The item or manufacturer part inside a sourcing project supports only a few flex fields, as opposed to an unlimited amount in the Item Master.

Standard fields on the Title Page tab of Items and the General Info tab of Manufacturer Parts are mapped automatically to related sourcing project AML fields. You may, however, also want to pull data from item and manufacturer part flex fields (such as those on Page Two or Page Three) into the AML and Analysis tab of sourcing projects and the Responses tab of RFQs. You can map custom fields so that sourcing projects automatically pull data from them correctly when you import those objects.

List flex fields (SingleList or MultiList) in a sourcing project have both a *List* property and a *Map Data To* property. If you select a value for the Map Data To property, the List property is automatically disabled (you cannot pull data from two places into one field). You can subsequently reconfigure the list field to pull data from another item master field, even after items have already been added to the project. However, when you change the value of the Map Data To property, you'll see a message warning that application data already exists with the current settings. If you decide to continue, the original flex field mapping is purged and cannot be recovered.

---

**Note:** There are a limited number of flex fields provided for the AML tab of sourcing projects, so you cannot map AML attributes to all the flex fields that exist for item and manufacturer part attributes.

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Field Type	Number of Fields
Date	5
List	5
Money	5
Multi-list	2
Multi-text	2
Number	5
Text	10

You can map these fields to flex fields in Item-Page Two & Item-Page Three.

Similarly, a Manufacturer Part in a Sourcing Project has the same number of flex fields. You can map them to flex fields in Manufacturer Parts > Page Two or Page Three.

When you map attributes from Project to the Page Three attributes of Items or Manufacturer Parts, you must ensure that they comply with the names of Page Three attributes and point to the same list (for List attributes) across all subclasses of the Item or Manufacturer Part.

To map sourcing project flex fields to Item and Manufacturer flex fields:

1. Enable and configure any of the following item, manufacturer part, and sites flex fields:
2. Enable and configure similar flex fields (that is, of the same data type) in the Sourcing Projects class. Make sure the fields are configured consistently with their related Item and Manufacturer Part flex fields. Otherwise, the data transfer between Product Collaboration and Product Cost Management won't work. For more information, see "[Tips for Configuring Flex Fields](#)" on page B-8.

The mapping of flex fields for Items & Manufacturer Parts can be done only in Sourcing Projects > AML tab. For each flex field that you enable in Sourcing Projects > AML > Items and in Sourcing Projects > AML > AML, specify the Map Data To property. This establishes the mapping between Product Collaboration and Product Cost Management.

The following table lists the Sourcing Projects flex fields that you can map to Item and Manufacturer Part flex fields.

Class/Tab	Attributes	Pull From
Sourcing Projects > AML > Items	Date (5)	Items.Page Two fields
	List (5)	Page Three fields
	MultiText (2)	
	Text (10)	
Money (5)	This cell is blank.	This cell is blank.
Number (10)		
MultiList (2)		
Sourcing Projects > AML > AML	Date (5)	Manufacturers Parts.Page Two fields
	List (5)	Page Three fields
	Money (5)	
	MultiList (2)	
	MultiText (2)	
	Number (10)	
	Text (10)	

- You can also enable flex fields on the Sourcing Projects > Analysis > Analysis and Requests for quote > Responses tabs. Fields with an "ipn" prefix and an "mpn" prefix automatically map to the Map Data To fields you've selected for Sourcing Projects > AML.

For example, the Sourcing Projects > AML > Items > Date01 field shares its Map Data To mapping with Sourcing Projects > Analysis > Analysis > ipnDate01 and Requests for quote > Responses > ipnDate01.

The following table lists IPN and MPN flex fields.

Class/Tab	Item flex fields	Manufacturer Part flex fields
Sourcing Projects > Analysis > Analysis	ipnDate (5)	mpnDate (5)
	ipnList (5)	mpnList (5)
	ipnMoney (5)	mpnMoney (5)
	ipnMultiList (2)	mpnMultiList (2)
	ipnMultiText (2)	mpnMultiText (2)
	ipnNumber (10)	mpnNumber (10)
	ipnText (10)	mpnText (10)
Requests for quote > Responses	NA	NA

### Example: Mapping Sourcing Project Flex Fields to Item Master Flex Fields

The following example shows how to configure sourcing projects to map data to flex fields, a Page Two field for items and a Page Two field for manufacturer parts. You can follow these steps to configure other item or manufacturer part flex fields for Product Cost Management.

Step 1: Enable a Page Two field for the Parts class

1. Under Data Settings, double-click the Classes node. The Classes page appears.
2. Double-click the Items > Parts class.
3. Click User Interface Tabs.
4. Double-click Page Two.
5. Click the Attributes: Page Two tab.
6. Double-click Text01.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, change the value to Part Dimensions.
9. In the Visible field, select Yes.
10. Click Save.

---

**Note:** In Java Client, when you, for example, map *part.pagetwo.Text01* to *Sourcing Project.AML.Items.Text05*, this data will be pulled to Text05 in *sourcing project.AML* tab. If the *sourcing project.item.Text05* is enabled, this value will be pulled to *sourcing project.items.Text05*.

---

Step 2: Enable a Page Two field for the Manufacturer Parts class

1. Under Data Settings, double-click the Classes node. The Classes page appears.
2. Double-click the Manufacturer Parts > Manufacturer parts class.
3. Click User Interface Tabs.
4. Double-click Page Two.
5. Click the Attributes: Page Two tab.
6. Double-click Text01.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, change the value to Mfr Part Dimensions.
9. In the Visible field, select Yes.
10. Click Save.

Step 3: Map a sourcing project AML attribute to a Page Two attribute for items

1. Under Data Settings, double-click the Classes node. The Classes page appears.
2. Double-click the Sourcing Projects class.
3. Click User Interface Tabs.
4. Double-click AML.

5. Click the Attributes: Items tab.
6. Double-click text1.

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---

**Note:** If you want to map a List or a Multi List field, make sure it points to the same list as pointed by the Page Two field in Items

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1. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
2. In the Name field, change the value to Part Dimensions.
3. In the Visible field, select Yes.
4. Click Map Data To field. Select Parts.Page Two.Part Dimensions. The AML tab attribute will pull its data from that Page Two attribute.
5. Click Save.

Step 4: Map a sourcing project AML attribute to a Page Two attribute for manufacturer parts

1. Go to Data Settings > Classes.
2. Double-click Sourcing Projects class.
3. Click User Interface Tabs.
4. Double-click AML.
5. Click the Attributes: AML tab.
6. Double-click text1.

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---

**Note:** If you want to map a List or Multi List field, make sure it points to the same list as pointed by the Page Two field in Manufacturer Parts.

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---

1. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
2. In the Name field, change the value to Mfr Part Dimensions.
3. In the Visible field, select Yes.
4. Click Map Data To field. Select Manufacturer Parts.Page Two.Mfr Part Dimensions. The AML tab attribute will pull its data from that Page Two attribute.
5. Click Save.

Step 5: Enable corresponding text attribute in Sourcing Project > Analysis tab

1. Go to Data Settings > Classes.
2. Click User Interface Tabs.
3. Double-click Analysis.
4. Click the Attributes: Analysis tab.
5. Double-click ipnText1.



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---

**Note:** If you want to map a List or Multi List field, make sure it points to the same list as pointed by the Page Two field in Items.

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**Note:** Each flex field with the "ipn" prefix is automatically mapped to the same Item flex field as its related Sourcing Projects > AML > Items flex field.

---

---

6. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
7. In the Name field, change the value to Part Dimensions.
8. In the Visible field, select Yes.
9. Click Save.
10. Double-click mpnText1.

---

---

**Note:** If you want to map a List or multiList field, make sure it points to the same list as pointed by the Page Two field in Manufacturer Parts

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**Note:** Each flex field with the "mpn" prefix is automatically mapped to the same Manufacturer Part flex field as its related Sourcing Projects > AML > AML flex field.

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11. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
12. In the Name field, change the value to Mfr Part Dimensions.
13. In the Visible field, select Yes.
14. Click Save.

Step 6: Enable corresponding text attributes in RFQ Responses > Response tab

1. Go to Data Settings > Classes.
2. Double-click the Requests for Quote > Requests for quote class.
3. Click User Interface Tabs.
4. Double-click Responses.
5. Click the Attributes: Responses tab.
6. Double-click ipnText 1.

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---

**Note:** If you want to map a List or Multi List field, make sure it points to the same list as pointed by the Page Two field in Items

---

---

7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, change the value to Part Dimensions.

9. In the Visible field, select Yes.
10. Click Save.
11. Double-click mpnText 1.

---

**Note:** If you want to map a List or Multi List field, make sure it points to the same list as pointed by the Page Two field in Manufacturer Parts.

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12. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
13. In the Name field, change the value to Mfr Part Dimensions.
14. In the Visible field, select Yes.
15. Click Save.

## Pushing Price Flex Fields from Sourcing Projects into the Item Master

Your company can enable custom price fields, such as additional material or non-material prices, for Item Master classes, such as Parts and Manufacturer Parts, as well as the Sourcing Project class. After you receive price quotes from a supplier, you can publish the prices from the project back to the Item Master. For subsequent sourcing projects, you can verify existing price scenarios by doing price lookups from the Analysis tab.

The Price Details tab of a sourcing project provides several price flex fields that you can enable for Product Cost Management. There are both Material Price Adder fields and Non Material Price Adder fields.

Price adders are essentially overhead rates. Price adders can be the additional cost of an item such as the intellectual property value, the royalty value, and so on, apart from the material cost. You are limited to seven price adder fields, which are common to all projects. Price adder fields can be enabled for suppliers or buyers, that is, for Supplier or Internal only (Buyer) purposes.

---

**Important:** There are seven Material Price Adder fields. All the material price adders can be set to visible "internally" (these will not be visible to suppliers) or to suppliers (suppliers will be able to view and edit these fields). These fields also can be configured if they have to store a "fixed" value or a "percent" value.

---

Non-material prices are prices that include the labor rate, sales tax, and other overhead costs.

The following table lists Material Price and Non-Material Price flex fields you can enable in different classes. Make sure you configure the fields consistently from one class to another.

The fields are automatically mapped to one another based on ID. For example, Non Material Price 1 in one class is automatically mapped to other Non Material 1 fields. For more information about configuring flex fields, see "[Tips for Configuring Flex Fields](#)" on page B-8.

Class/Tab	Material Price Attributes	Non-Material Price Attributes
Sourcing Projects > Price Details	7 Material Price Adders	Non Material Price (25)
Sourcing Projects > Analysis > Non Material Price Entry	n/a	nonMaterialModifier (20) Non-Material Price (5)
Prices > Published Prices > Price Lines	Material Price (7)	Non Material Price (25)
Prices > Quote Histories > Price Lines	Material Price (7)	Non Material Price (25)
Items > Documents > Prices	Material Price (7)	Non Material Price (25)
Items > Parts > Prices	Material Price (7)	Non Material Price (25)
Manufacturer Parts > Prices	Material Price (7)	Non Material Price (25)

## Price Adders

Price Adders can be either material or non-material. Many customers require partners/suppliers to apply adders to the top level of assemblies, not at the individual line items. Often, these adders are represented as a percent (%) value instead of a fixed value.

Most non-material costs can only be a fixed value, so to use a percent value, configure one of the percent-specific Non-Material Adders that are configurable.

The price adders that can be configured are:

- Material Adders-numbers 1 through 7 can be configured as Internal or Supplier.
- Non-Material Adders-numbers 20 through 25 can be configured as a calculation type of either percent (%) or a fixed value.

When a supplier enters a percent value, the system will multiply the percentage with the material cost and the result is added to the non-material price.

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**Note:** Non-material percent types are useful only if a material price exists.

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The attributes are added to the total cost and are not associated with the non-material costs as shown in the table below.

Non-Material Price	Material Price
Non-Material Price_1 (fixed value) = 50	Material Price = 100
Non-Material Price_20 (percent value) = 25	NA
Total Non-Material Price = 75 ((0.25 * 100) + 50)	Total Material Price = 100
Total Extended Cost = 175	NA

### Configuring Material Price Adders

You can configure Material Adders numbered 1 through 7 as Internal or Supplier, with a fixed or percent value. The Material Adders function as Cost Elements that are

added to every Cost Estimate after the initial Estimate of Costs for material and labor. Adders typically include General and Administrative Cost, Overhead and Profit.

---

**Note:** The Material Adders can be given a fixed or percent value.

---

#### Configuring Material Adders

1. Go to Data Settings > Classes.
2. Double-click the Sourcing Projects class and go to User Interface Tabs tab.
3. Double-click Price Details and go to Attributes: Price Details tab.
4. Double-click Material Price Adder 1.
5. Select either *Fixed* or *Percent* from the Calculation Type dropdown list
6. Select either *Internal Only* or *Supplier* from the Visible To dropdown list
7. Click Save and Close.

#### Non-Material Adders

Non-material costs support a percent value of Material Costs. Some costs that are added to a Cost Estimate, such as royalties, warranties, and guarantees.

You can configure Non-Material Adders 20 through 25 to support a percent value of Material Costs.

---

**Note:** Sometimes the Non-Material Adders are referred to as Non-Standard Adders in the industry.

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#### Configuring Non-Material Adders as a Percent value:

1. Go to Data Settings > Classes.
2. Double-click the Sourcing Projects class and go to User Interface Tabs tab.
3. Double-click Price Details and go to Attributes: Price Details tab.
4. Double-click Non-Material Price 20.

---

**Note:** You can only configure Non-Material Price Adders 20 to 25 as "Percent." All others are set to "Fixed" and are not configurable.

---

5. Select either *Fixed* or *Percent* from the Calculation Type dropdown list.
6. Select Yes in the Visible list.
7. Click Save and Close.

#### Example: Enabling a Labor Cost Per Unit Field

The following example shows how to enable a Non-Material Price flex field called Labor Cost Per Unit for several Agile PLM classes. You can follow these steps to configure other price flex fields for Product Cost Management.

##### Enabling a Labor Cost Per Unit Field

1. Go to Data Settings > Classes.

2. Complete steps 3 through 9 for *each* of the following steps:
  - a. For Parts: Double-click the Items > Parts class
  - b. For Documents: Double-click the Items > Documents class
  - c. For Manufacturer Parts: Double-click the Manufacturer Parts > Manufacturer parts class
  - d. For Published Prices: Double-click the Prices > Published Prices class
  - e. For Quote Histories: Double-click the Prices > Quote Histories class
  - f. For Sourcing Projects: Double-click the Sourcing Projects > Sourcing projects class.
3. Go to User Interface Tabs tab.
4. Double-click Prices and go to Attributes: Prices tab.
5. Double-click Non-Material Price1.
6. Cut the text from the Name field and paste it in the Description field. This will help you identify the original attribute name.
7. In the Name field, type Labor Cost Per Unit.
8. Select Yes in the Visible list.
9. Click Save.

---

**Note:** In all the above, if you want to use a specific price field (like Non-Material Price1), you have to use the same Non-Material Price1 field in all corresponding classes (Parts, Documents, Manufacturer Parts, Published Prices, Quote Histories & Sourcing Projects). You cannot use Non-Material Price1 to capture Labor Cost in Parts Class and Non-Material Price 2 to capture the same in Manufacturer Parts Class.

---

## Pushing Response Flex Fields from Project-Analysis into Published Prices & Quote Histories

RFQ Responses contain a header area that can include several flex fields. If you enable any flex fields on the Responses tab of RFQs, you can map to Page Two fields in Published Prices & Quote Histories. When you publish the responses to the Item Master, the flex fields that you map will be updated.

To map Response flex fields in Project-Analysis tab to Page Two or Price Line fields in Published Prices & Quote Histories

1. Enable and configure any of the following flex fields in the Sourcing Projects class. The same set of flex fields is also available in "Requests for Quote" class and can be filled by the Suppliers when responding to RFQs.
2. Enable and configure similar flex fields (that is, of the same data type) listed in the tables below. Make sure the fields are configured consistently with their related Requests for Quote flex fields. Otherwise, the data transfer between Product Collaboration and Product Cost Management won't work. For more information, see ["Tips for Configuring Flex Fields"](#) on page B-8.

Class/Tab	Attributes
Sourcing Projects > Analysis > Analysis	resp Date (5) resp List (5) resp Money (10) resp MultiList (2) resp MultiText (2) resp Number (10) resp Text (10)
Items > Documents > Prices	Date (5) List (5) Money (5) MultiList (2) MultiText (2) Number (10) Text (10)
Items > Parts > Prices	NA
Manufacturer Parts > Prices	NA
Prices > Published Prices > Page Two	NA
Prices > Published Prices > Page Three	NA
Prices > Published Prices > Price Lines	NA
Prices > Quote Histories > Page Two	NA
Prices > Quote Histories > Page Three	NA
Prices > Quote Histories > Price Lines	NA

- Finally, enable and configure flex fields on the Sourcing Projects > Projects > Analysis > Analysis tab. Make sure you specify the Map Data To property. This establishes the mapping between Product Cost Management and Product Collaboration.

### Pushing Data in Flex Fields from Sourcing Project to Item Master

To publish data from Flex Fields in Sourcing Project to Item Master, you can use the Map Data To field. This field actually functions to "push" data to that location, and requires a value.

Class/Tab	Attributes	Push Data To
Sourcing Projects > Analysis > Analysis	respDate (5) respList (5) respMoney (10) respMultiList (2) respMultiText (2) respNumber (10) respText (10)	Prices.Price Lines fields Prices.Page Two fields Page Three fields

**Example: Mapping a Response Flex Field**

The following example shows how to enable a Response flex field called Supplier Note in Sourcing Project so that it is mapped to "Published Price" or "Quote History" classes. You can follow these steps to configure other RFQ flex fields for Product Cost Management.

Step 1: Enabling a Supplier Note field for the Responses tab of RFQs

1. Go to Data Settings > Classes.
2. Double-click the Requests for Quote > Request for quote class.
3. Click User Interface Tabs.
4. Double-click Responses.
5. Click Attributes: Responses.
6. Double-click resp MultiText 1.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, type Supplier Note.
9. In the Visible field, select Yes.
10. Click Save.

Step 2: Enabling a Supplier Note Field for Published Prices

1. Go to Data Settings > Classes.
2. Double-click the Prices > Published Prices class.
3. Click User Interface Tabs.
4. Double-click Price Lines.
5. Click the Attributes: Price Lines tab.
6. Double-click MultiText01.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, type Supplier Note.
9. In the Visible field, select Yes.
10. Click Save.

Step 3: Enabling a Supplier Note Field for Quote Histories

1. Go to Data Settings > Classes.
2. Double-click the Prices > Quote Histories class.
3. Click User Interface Tabs.
4. Double-click Price Lines.
5. Click the Attributes: Price Lines tab.
6. Double-click MultiText01.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, type Supplier Note.

9. In the Visible field, select Yes.

10. Click Save.

#### Step 4: Enabling a Supplier Note Field for Parts

1. Go to Data Settings > Classes.

2. Double-click the Items > Parts class.

3. Click User Interface Tabs.

4. Double-click Prices.

5. Click the Attributes: Prices tab.

6. Double-click MultiText01.

7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.

8. In the Name field, type Supplier Note.

9. In the Visible field, select Yes.

10. Click Save.

#### Step 5: Enabling a Supplier Note Field for Documents

1. Go to Data Settings > Classes.

2. Double-click the Items > Documents class.

3. Click User Interface Tabs.

4. Double-click Prices.

5. Click the Attributes: Prices tab.

6. Double-click MultiText01.

7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.

8. In the Name field, type Supplier Note.

9. In the Visible field, select Yes.

10. Click Save.

#### Step 6: Enabling a Supplier Note Field for Manufacturer Parts

1. Go to Data Settings > Classes.

2. Double-click the Manufacturer Parts > Manufacturer parts class.

3. Click User Interface Tabs.

4. Double-click Prices.

5. Click the Attributes: Prices tab.

6. Double-click MultiText01.

7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.

8. In the Name field, type Supplier Note.

9. In the Visible field, select Yes.

10. Click Save.



Step 7: Enabling a Supplier Note field for the Analysis tab of sourcing projects

1. Go to Data Settings > Classes.
2. Double-click the Sourcing Projects > Sourcing projects class.
3. Click User Interface Tabs.
4. Double-click Analysis.
5. Click the Attributes: Analysis tab.
6. Double-click resp MultiText 1.
7. Copy the text in the Name field and paste it into the Description field. This will help you identify the original attribute name.
8. In the Name field, type Supplier Note.
9. In the Visible field, select Yes.

In the Map Data To field, select "Published Prices.Price Lines.MultiText01". Even though the dropdown will list the fields from both Published Prices & Quote Histories, you can choose only one.

You can also map the above flex field to a Multi Text field in Page Two tab of "Published Prices" class. The above example maps it to the Price Lines tab of the "Published Prices" class.

---

**Note:** Although the field is named Map Data To, in this case it *pushes* data to the selected field when you publish responses to the Item Master.

---

10. Click Save.

## Configuring BOM Filters

This section explains how to set up the BOM filters. For more details on concepts and usage of BOM filters, see the "Working with Sourcing Projects" chapter which contains a section, "Adding Items to a Project," that explains how to set up the BOM filter in Web Client.

Set up a Sourcing Project Class BOM attribute:

1. Go to Data Settings > Classes.
2. Double-click Sourcing projects class.
3. Go to User Interface Tabs tab and double-click Items in the list.
4. Go to Attributes: Items tab.
5. Double-click Filter in the Attributes name list.
6. Select Yes from the Visible dropdown list.
7. Rename the Filter for your purposes. For example: "Production BOM."

## Setting up Names of BOM Filters

To distinguish between BOM items that you will filter for import, you must first set up and name certain attributes for each specific BOM that you plan to import.

For example, if you have two versions of the same BOM, one called "Production" and another called "Prototype," you would need to set up a list attribute for each BOM. It is suggested that you name the list attribute based on your use case scenario. You can use any existing attribute as a template; this example uses "BOM List 3" as a template.

---

**Note:** BOM Filters are supported in the Parts class, but not in the Documents class.

---

---

**Note:** A BOM Filter supports filtering on multiple BOM flex fields only. It supports only Text1-5, Numeric1-5, List1-5 that are defined in Item.BOM tab, besides Qty from the Item.BOM tab. It does not support filtering on date fields, multi-list fields, and multi-text fields.

---

Set up a Parts Class BOM attribute:

1. Go to Data Settings > Classes.
2. Double-click Parts class.
3. Go to User Interface Tabs tab and double-click BOM.
4. Go to Attributes: BOM tab.
5. From the list of attribute names, double-click the attribute you will use as a template. For example, "BOM List 3."
6. Copy the original attribute's name into the description field and rename the attribute according to your use case scenario, for example: "Prod Load."
7. In the Visible field, select Yes.
8. To the right of the List field, click the New List button to create a new list. A *Create List* window pops up.
9. Name the list the same as the new attribute, and give a description. For example, name it "Prod Load" and give it the description, "Filter."
10. You may Enable or Disable the New List by making appropriate selection in Enabled dropdown list.
11. Chose Yes or No from Cascade dropdown list to create a cascaded List.
  - a. If you select No for Cascade, the *List* window (the New List name window) appears along with the *Create a new list value* pop-up. Enter a name in Name field and click Add button, or click Add Another button to continue adding more list values.
  - b. You can also add the list values later. For more information on adding or configuring Lists, see Lists.
  - c. If you select Yes for Cascade, the *List* window (the New List name window) appears. In the List tab, you will find the New List Name as the first item, denoting that it is the base value of the Cascade List. Click New button to add cascade list values under this.
  - d. The *Create a new list value* pops up. Enter a name in Name field and click Add button, or click Add Another button to continue adding more list values. These list values appear as a cascaded under the New List name.

e. You can add list values to these list values to get any level of cascaded lists. To do so, select a List Value and click New button. Follow step 3 above.

f. Click Save and Close to return to BOM List 3.

**12. Click Save and Close.**

For detailed instructions on how to create a sourcing project using this new BOM filter, refer to Chapter 2, "Working with Sourcing Projects".

## Managing Events in PCM

In Agile PLM, a preconfigured event is an automation that occurs when a user performs a task that is specified by the event mask. The triggered event then results in event outcome, such as the delivery of a notification to a user. An Agile administrator, with the appropriate privileges, can manage the different components of the event process.

There is limited event functionality for the PCM solution, however, some events can be configured for PCM objects including Sourcing Projects, RFQs, RFQ Responses, Suppliers, Prices, and PCOs. Additionally, some events are supported only for certain tabs of an object.

The following content breaks down the PCM objects tab by tab to show you which event types are supported.

For the Commodity object:

- (at object level) - Create Object, Delete Object, Export Object, Save As Object
- General Info Tab - Update Table
- Parts Tab - Update Table
- Relationships Tab - Update Table
- Attachments Tab - Check In Files, Check Out Files, Get File, Update Table

For the Price object:

- (at object level) - Create Object, Delete Object, Export Object, Save As Object
- General Information Tab - Update Table
- Relationships Tab - Update Table
- Attachments tab - Check In Files, Check Out Files, Get File, Update Table

For the PCO object:

- (at object level) - Create Object, Delete Object, Export Object, Save As Object, Change Status For Sourcing Object
- Cover Page Tab - Update Table
- Relationships Tab - Update Table
- Attachments tab - Check In Files, Check Out Files, Get File, Update Table

For the RFQ object:

- (at object level) - Delete Object, Change Status For Sourcing Object
- Cover Page Tab - Update Table
- Relationships Tab - Update Table
- Attachments tab - Check In Files, Check Out Files, Get File, Update Table

For the RFQ Response object:

- Cover Page Tab - Update Table
- Relationships Tab - Update Table
- Attachments tab - Check In Files, Check Out Files, Get File, Update Table

For the Sourcing Project object:

- (at object level) - Create Object, Delete Object, Save As Object, Change Status For Sourcing Object
- General Information Tab - Update Table
- Relationships Tab - Update Table
- Attachments tab - Check In Files, Check Out Files, Get File, Update Table

For the Supplier object:

- (at object level) - Create Object, Delete Object, Export Object, Save As Object
- General Info Tab - Update Table
- Relationships Tab - Update Table
- Attachments Tab - Check In Files, Check Out Files, Get File, Update Table

The following are examples of practical situations in which events could be used in PCM:

- Once a sourcing buyer sets authorized users for a sourcing project or an RFQ, notifications can be sent to the users by using the Update Table event type.
- The Create Object event type can be used to automatically open a project for RFQ creation.
- The Create Object event type can be used to carry prices over to a newly created MCO.
- A global commodity manager imports parts into a sourcing project. Some of the parts are associated with specific regional commodity managers. The Change Status for Sourcing Object event type can be used to send notifications to the regional managers once the project is open and ready for RFQ creation.

There are many other situations in which the use of events may be a useful and efficient way to achieve a certain outcome. For more details about events and how to configure and manage them, see the *Agile PLM Administrator Guide*.

---

## Deleting Agile Objects

Java Client and Web Client support "soft" and "hard" deletes for many Agile object classes. When you soft-delete an object in the database, it is not permanently deleted. A soft-deleted object is marked "Deleted" in the database, and its object number or name is reserved. You cannot create another object with the same type and number or name as a soft-deleted object.

When you run a search, soft-deleted objects do not appear in the search results table. To locate soft-deleted objects, you must run the predefined deleted object searches in the Recycle Bin Searches folder.

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**Note:** You have access to the Recycle Bin Searches folder if Recycle Bin Searches is included in the Searches field of your user profile. If you have the appropriate privileges, then you can edit your user profile and add Recycle Bin Searches to the list of searches in the Searches field. If you do not have the appropriate privileges to modify the Searches field in your user profile, then ask the Agile administrator to modify your user profile.

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A hard-deleted object is permanently removed from the database.

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**Caution:** You *cannot* undelete a hard-deleted object.

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In order to soft-delete, hard-delete or undelete an Agile object:

- You must have the appropriate Delete or Undelete privileges for that object.
- All relationships and subscriptions must be removed.
- The object must meet any additional conditions that determine whether it can be deleted or undeleted.

In general, if deleting or undeleting an object would cause the compromise of data integrity, the delete or undelete action is disabled.

For detailed information about deleting specific object types, see ["Notes about Deleting Specific Agile Object Types"](#) on page C-3.

### Soft-Deleting an Object

When an object is soft-deleted, it is no longer available for use. However, until it is hard-deleted, its number or name is reserved in the Agile PLM database and cannot be reused.

To soft-delete an object in Web Client:

1. Select and open the object you want to delete.
2. Choose Actions > Delete, and respond OK to the confirmation prompt.

The object is soft-deleted.

To soft-delete an object in Java Client:

1. Select and open the object you want to delete.
2. Click the Delete button , and respond Yes to the confirmation prompt.

The object is soft-deleted.

See also: "[Deleting Agile Objects](#)" on page C-1, "[Undeleting an Object](#)" on page C-2 , and "[Hard-Deleting an Object](#)" on page C-2.

## Undeleting an Object

If you have the appropriate privileges, then you can undelete soft-deleted objects.

To undelete an object in Java Client:

1. Run the appropriate Deleted *objects* search from the Recycle Bin Searches folder.
2. Open the deleted object you want to restore.
3. Click the Undelete button .

To undelete an object in Web Client:

1. Run the appropriate Deleted *objects* search from the Recycle Bin Searches folder.
2. Open the deleted object you want to restore.
3. Choose Actions > Undelete.

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**Note:** You can click the Navigator button in the search results table to display the search result object links in the left pane NAVIGATOR drawer

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## Hard-Deleting an Object

Soft-deleted objects still exist in the database. To remove an object permanently, you must hard-delete it. While an object is still only soft-deleted, you can undelete it. Run the appropriate Deleted *object* search from the Recycle Bin Searches folder.

To hard-delete a soft-deleted object (if you have the appropriate privileges) in Java Client:

1. Run the appropriate Deleted objects search from the Recycle Bin Searches folder.
2. Open the object.
3. Click the Delete Object button, and respond Yes to the confirmation prompt.

To hard-delete a soft-delete object (if you have the appropriate privileges) in Web Client:

1. Run the appropriate Deleted objects search from the Recycle Bin Searches folder.
2. Select the one or more object rows in the search results table.
3. Click the Delete button.

4. In response to the warning prompt, choose Continue and then click Finish.
5. Or, you can hard-delete one object at a time:  
Open the object.  
Choose Actions > Delete, and respond OK to the confirmation prompt.

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**Note:** You can click the Navigator button in the search results table to display the search results object links in the left pane NAVIGATOR drawer.

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See also: "[Undeleting an Object](#)" on page C-2 and "[Soft-Deleting an Object](#)" on page C-1

## Notes about Deleting Specific Agile Object Types

The following sections show notes about deleting specific Agile Object Types.

### Notes about Deleting Item Objects

Before you can delete an item object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The item has no released changes against it.
- The item is not listed on the Affected Items tab of any pending changes.

You must first remove the item from the Affected Items tab of each pending change before you can delete the item.

- The item has not been added to PSR.
- The item has not been added to QCR.
- The item has not been added to Material Declaration.
- The item has not been added to Price.
- The item has no content on its BOM tab for the current revision or any pending revisions.
- The item has no content on its Manufacturers tab for the current revision or any pending revisions.
- The item is not used on the Bill of Materials of any other item, that is, the item to be deleted is not a child item on the BOM tab of a parent item revision, including the latest released revision, past released revisions, or pending revisions of the parent item.
- The item is not associated with a Part Family, that is, the item does not appear on the Parts tab of a Part Family object. On the Title Page of the item to be deleted, the Part Family field must be empty. If the Part Family field is populated, then the Actions > Delete command is disabled.

### Notes about Deleting Change Objects

Before you can delete a change object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges. For example, you are the change analyst or component engineer, and the Agile administrator has given change analysts or component engineers the appropriate privileges to delete a change.
- All relationships and subscriptions have been removed.
- The change is at the Pending status type or the Unassigned status.
- You have Discovery and Read privileges for any items on the Affected Items table, otherwise, you cannot delete the change.

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**Note:** To delete a change that has already been released, you must first unrelease the change. You need the appropriate privileges to unrelease a change by using the Workflow tab to switch it to a different status.

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- When you soft-delete a change that has items on the Affected Items tab, all redlines associated with that change are discarded. To preserve data integrity, a soft-deleted change with items on the Affected Items tab cannot be undeleted. That is, a soft-deleted change can be undeleted only if there are no items on the Affected Items tab.

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**Note:** If you think you might want to undelete a soft-deleted routable object in the future, then be sure to clear its Affected Items tab before you delete it. You can undelete only routable objects with no entries on the Affected Items tab. If you want to keep the record of affected items but still want to delete the change object, then use the Save As command to copy it under another change object number before deleting it.

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## Notes about Deleting Transfer Order Objects

Before you can delete a Transfer Order object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The transfer order is at the Pending status type or the Unassigned status.

## Notes about Deleting PSR or QCR Objects

Before you can delete a Product Service Request (PSR) or Quality Change Request (QCR) object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The PSR or QCR is at the Pending status type or the Unassigned status.
- You have Discovery and Read privileges for any items on the Affected Items table; otherwise, you cannot delete the PSR or QCR.



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**Note:** To delete a PSR or QCR that has already been released, you must first unrelease it. You need the appropriate privileges to unrelease a PSR or QCR by using the Workflow tab to switch it to a different status.

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You *cannot* delete a PSR if:

- It appears on the Relationships tab of a QCR.
- It is currently part of a corrective action process. Remove the PSR from the QCR and then delete the PSR.
- It appears in the Related PSR tab of another PSR.
- It is currently part of a larger problem. Remove this PSR from the parent PSR and then delete it.
- It appears on the Related PSR tab.
- It is being used to aggregate multiple problems. Remove the related PSRs and then delete it.

You *cannot* delete a QCR if:

- It has any PSRs on the Relationships tab.
- If the corrective action process contains Problem Reports. Remove the PSR from the QCR and then delete the QCR.
- It has any Changes on its Relationships tab.
- If the corrective action process is already routed through engineering changes. Remove the Changes from the QCR and then delete the QCR.

## Notes about Deleting Sourcing Project, RFQ and RFQ Response Objects

Agile Product Cost Management (PCM) objects include: Sourcing Project, RFQ, and RFQ Response. Before you can delete any Agile PCM object it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- Sourcing Project

The sourcing project has no RFQs.

If the sourcing project has RFQs, the RFQs are in the closed state.

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**Note:** Sourcing project objects can be soft deleted, but soft-deleted sourcing project objects cannot be undeleted or hard deleted.

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- RFQ

The RFQ has no released changes against it.

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**Note:** RFQ objects can be soft deleted, but soft-deleted RFQ objects cannot be undeleted or hard deleted.

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- RFQ Response

The delete action is not supported for RFQ response objects.

## Notes about Deleting Package Objects

Before you can delete a Package object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The package is at the Pending status type or the Unassigned status.

## Notes about Deleting Manufacturer Objects

Before you can delete a manufacturer object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- It is not listed on the Manufacturers tab of an item. (Check the Where Used tab of the manufacturing object.)
- If the object is a manufacturer, no manufacturer parts are associated with it.

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**Note:** If all manufacturer parts associated with a manufacturer have been deleted, then the manufacturer can be deleted as well. However, you will not be allowed to undelete the soft-deleted manufacturer parts until the soft-deleted manufacturer object is undeleted.

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## Notes about Deleting Site Objects

Before you can delete a Site object, it must meet the conditions described below.

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**Note:** Site objects can be soft deleted, but soft-deleted sites cannot be undeleted or hard deleted. If you are no longer using a site, then Agile recommends that you disable it.

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- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- The site does not appear on any item's Sites tab.
- The site is not associated with any other Agile object.
- The site has a lifecycle of Disabled.

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**Note:** If it meets the conditions listed above, then a disabled site can be soft-deleted even when it is listed in the Sites or Default Site field of user profiles. The deleted site is automatically removed from the Sites list in any user profile where it is listed.

§ Once the site has been associated with an item, you can change its status to Disabled, but you cannot delete it.

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## Notes about Deleting User Objects

Before you can delete a User object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.

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**Note:** User objects *cannot* be hard-deleted.

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User access to Agile PLM can also be controlled by using the user profile Status property. For example, if someone leaves the company, or will no longer be using Agile PLM, or you need to prevent a user from logging in to the Agile PLM system, then disable the user object by setting the Status property to Inactive. The user remains listed on the Java Client Administrator Users node and on the Web Client Address Book Users tab, and the name still appears on existing workflows, escalations, and so forth, but the user will no longer appear in the Address Book for other users to select. You can re-set the user to Active status at any time.

In Java Client Administrator, to display the list of deleted users, you can use either the Deleted Users node or the Recycle Bin search Deleted Users. In Agile Web Client, to display the list of deleted users, use the Recycle Bin search Deleted Users.

For detailed information about managing Agile PLM users, see *Agile PLM Administrator Guide*.

## Notes about Deleting User Group Objects

You can delete a user group that is no longer needed.

Before you can delete a user group object, it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.

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**Note:** If you set a user group Status to Inactive, then the inactive group appears in the search results table. In contrast, a soft-deleted user group does not appear in the search results table.

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If you delete a user group to which users have been assigned, then you can do so without removing the users who were in the user group:

- Global User Groups - when you soft-delete a global user group, the group is listed in the group members' user profile Groups tabs as an inactive group. When you

hard-delete a global user group, the user assignments to that global user group are also deleted and do not appear on the user profile Groups tab.

- Personal User Groups - For personal user groups, whether active or inactive, assignments are not listed on the group members' user profile Groups tabs.'

When you delete a user group, it is removed from the Agile PLM address book. You cannot delete a user group if it is in use in these cases:

- It is on any routable object signoff list on the routable object Workflow tab.
- It is listed in any workflow definition Notify properties.
- It is used as a designated escalation person for any users, user groups, and partners.

In Java Client Administrator, to display the list of deleted user groups, you can use either the Deleted User Groups node or the Recycle Bin search Deleted User Groups. In Agile Web Client, to display the list of deleted users, use the Recycle Bin search Deleted User Groups.

## Notes about Deleting PG&C Objects

Agile Product Governance & Compliance (PG&C) objects include: Declarations, Specifications, Substances, and Part Groups. Before you can delete any Agile PG&C object it must meet the conditions described below.

- The Agile administrator has assigned to you a role that has the appropriate Delete privileges.
- All relationships and subscriptions have been removed.
- Substances, Specifications, and Part Groups

If the substance, specification or part group object is in use, then it cannot be deleted.

- Declaration

The Declaration is at the Pending status type or the Unassigned status.