# Product Cost Management Supplier Handbook

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# REVISIONS

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# PREFACE

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

To read the PDF files, you must use the free Adobe Acrobat Reader™ version 7.0 or later. This program can be downloaded from the www.adobe.com.

The Oracle Technology Network (OTN) Web site can be accessed through **Help > Manuals** in both the Agile Web Client and the Agile Java Client. If applicable, earlier versions of Oracle|Agile PLM documentation can be found on the www.agile.com/support.

If you need additional assistance or information, please contact **support@agile.com** or phone (408) 284-3900 for assistance.

Before calling Agile Support about a problem with an Oracle|Agile PLM manual, please have ready the full part number, which is located on the title page.

## Readme

Any last-minute information about Oracle|Agile PLM can be found in the Readme file on the Oracle Technology Network (OTN) Web site.

Agile Training Aids

Go to the Agile Training Web page for more information on Agile Training offerings.

# Chapter 1
# Introduction

*This chapter provides an overview of Agile Product Cost Management (PCM) features and processes and the various user roles a supplier can have. It has the following sections:*



## Overview

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

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

## What is Product Cost Management?

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

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

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

## What's New in Agile Product Cost Management

The following list describes the new capabilities that Agile PCM provides to supplier users:

- Visibility and participation in the contract award and management process.
- RFQ responders can use discussions to have threaded dialogues with their customers.
- RFQ responders can add attachment files to RFQs.

  **Note** All functionality depends upon the user having the proper roles and privileges to execute the action or access content.

## Introducing Agile Objects

**Note** For a complete description of Agile 9.2.1.1 concepts and tasks, see *Getting Started with Agile PLM*. From the menu bar, select **Help | Manuals** to display the Agile 9.2.1.1 documentation web page.

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

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

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

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

## Sourcing Process

Supplier users do the following:

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

## Login Security and Passwords

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

For system security, the Agile administrator may configure the Agile system so that you are not allowed to log in after a specified number of password failures (entering the wrong password). The lockout applies to both your login password and your approval password.

Depending on system settings, one of the following occurs:

- The login lockout lasts until a specified time has passed (for example, one minute).

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

## Discovery and Read Privileges

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

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

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

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

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

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

For more information about the Discovery and Read privileges, see the *Agile 9.2.1 Administrator Guide*.

## Viewing and Working with Attachments

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

> **Note** All attachment tasks (including check in, check out, and add) can be performed from the **Attachments** tab of the object you are working with, if you have the appropriate privileges for that object type (for example, RFQ Response objects).

For detailed information about file folders and attachment files, see *Getting Started with Agile PLM*.

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

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

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

## Searching for Objects

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

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

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

## Using the Filter Tool

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

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

**To use the filter tool:**

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

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

   **Note** To see all rows in the table, select **Show All** in the **Attribute** drop-down list, then click **Apply**.

## Numeric Search and Entry Using Special Characters

When data is entered in a numeric field (either in search criteria or on **Page Two** or **Page Three** (custom tabs or sections defined by the Agile administrator), if the number is followed by a special character, the number is multiplied by the appropriate scaling factor and entered in the database. For example, if you enter `25k` in a numeric field, the Agile system stores `25000` in the database. Also, if you enter `25k` in search criteria, the Agile system searches for 25000.

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

# CHAPTER 2
# Managing Your User Profile

*This chapter describes how to manage your user settings. It includes the following topics:*

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

## Managing Your User Settings

You access Web Client settings by choosing **Settings** from the main menu bar.

This section includes the following topics:

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

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

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

**Note** Supplier managers can see and modify additional information on the Administrator page. For details, see Chapter 3, “Managing Supplier Details.”

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

## Changing Your User Profile

Your user profile contains a variety of information about how to contact you, your date and time preferences, and several Agile Web Client onscreen display preferences. You have an opportunity to enter information when you first log in to Agile Web Client.

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

1. Open your user profile by clicking **Settings > User Profile.**
2. Click the tab on which you want to make changes.
3. To make changes to the **General Info** and **Preferences** tabs, click **Edit** and use the lists, browse buttons, and text boxes to enter the requested information. To make changes to the **Escalations** and **Attachments** tabs, select the checkbox for the row you want to edit, and click the appropriate button: **Edit**, **Delete**, or **Remove.**

## Changing Your Password

These instructions describe how to change your login password. If you have a separate approval password, the process to change your approval password is similar using the **Change Approval Password** option.

**To change your login password:**

1. Click **Settings > Change Login Password.**

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

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

## Viewing Signoff Authority Transfers

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

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

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

## RFQ Response Edit Mode

You can enter RFQ line item responses in three ways. You select which response entry mode you want to use on the **Preferences** tab of your User Profile. You can change your selection at any time. If you like, experiment with each response entry mode to discover which one you prefer.

For more details about the various methods for entering response information, see “Entering and Modifying RFQ Response Information” on page 4-8.

- Basic

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

The Basic entry mode displays a single page for each line item. You fill out the fields for one line item, then click a button to save your entries and go to the next line item in the RFQ. See “Basic Edit” on page 4-10.

- Advanced Wizard Edit

  The Advanced Wizard Edit mode lets you display the **Responses** tab of the RFQ Response object, where the line items are displayed in a table. Select the line items you want, then, from the tab menus, choose the action you want to perform. When you choose **Responses | Enter/Modify**, the selected line items are displayed in a page at a time, similar to the Basic entry mode. However, Advanced Wizard Edit mode provides additional features and shortcuts. See “Advanced Wizard Edit” on page 4-9.

- Advanced Table Edit

  The Advance Table Edit mode lets you display the **Responses** tab of the RFQ Response object, where the line items are displayed in a table. Select the line items you want, then, from the tab menus, choose the action you want to perform. When you choose **Responses | Enter/Modify**, you can enter and modify information in the table cells. Of the three entry modes, the Advanced Table Edit mode is the most similar to a spreadsheet program (for example, Microsoft Excel). See “Advanced Table Edit” on page 4-9.

**To switch between entry modes:**

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

# CHAPTER 3

# Managing Supplier Details

*This chapter describes how to maintain the supplier organization profile, add contact users, add manufacturer and commodity line card offerings, and maintain RFQ routing specifications for suppliers. It has the following sections:*



## Managing Your Supplier Profile

The Supplier portion of Agile PCM helps you, the supplier user, manage your RFQ Responses. The sourcing manager creates the RFQ and sends it to individual suppliers. As a supplier user, you can submit responses to the sourcing manager, view attachments, view the history of your RFQ Responses and (with the appropriate privileges) import or export responses, run reports, and collaborate in price management. See Chapter 4, “Responding to Request for Quotes,” and Chapter 5, “Collaborating on Pricing and Contract Information.”

## About the Supplier Manager

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

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

## Viewing Your Supplier Profile

**Note** For more information about supplier profiles, see the chapter about working with suppliers and supplier groups in *Getting Started with Agile PLM*. From the menu bar, select **Help | Manuals** to display the Agile PLM 9.2.1 documentation web page.

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

**To bookmark your supplier profile:**

1. In the main menu, enter an asterisk character * in the Run Simple Search field. (Asterisk is a search wildcard character that stands for any group of characters.)
2. Click the **Show Search Options** icon.
3. In the drop-down list, select Supplier.
4. Click the **Run Simple Search** button.
5. In the search results, click the link for your supplier organization in the Name/Number column.

   The tabbed object for your supplier profile is displayed.
6. In the Actions menu, select **Bookmark**.
7. In **Shortcuts** in the navigation pane on the left, a bookmark for your supplier organization appears under **My Bookmarks**. You can use this bookmark at any time to open your supplier profile.

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

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

Table 3-1: Suppliers tabs

| Supplier tab name | Default fields include | Tab information includes |
|---|---|---|
| **General InfoTab** | **Name**, **DUNs**, **Description**, **Web Supplier**, **Address**, **City**, **Country/Area**, **Region/Province/State**, **Postal/Zip Code**, **Phone**, **Fax**, **URL**, **Corporate Currency**, **Create User** | General information about the supplier organization. |
| **Contact Users Tab** | **User Name**, **Created By** | Contains all supplier users associated or created. |
| **RFQ Routing Tab** | **Continent**, **Ship-To** | RFQ routing information. |
| **Manufacturers Tab** | **Manufacturer Name**, **Ship-To**, **Rating** | Manufacturer line information. |
| **Commodities Tab** | **Manufacturer Name**, **Ship-To**, **Rating** | Commodity information. |
| **PSRs Tab** | **PSR Number and other related fields** | PSR information |
| **Attachments Tab** | **File Description**, **File Name**, **Checkout User**, **Checkout Date**, **Checkout Folder**, **Modified Date**, **File Version**, **File Size**, **File Type**, **Last View Date** | Attached files. |

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

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

## Fields on the General Info Tab

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

Table 3-2: Cover Page tab fields

| Field | Description | Can be edited by the supplier manager? |
|---|---|---|
| **Name** | Name of the supplier. | No |
| **Supplier Type** | Indicates if the supplier is of the following types:<br>• Component Manufacturer<br>• Contract Manufacturer<br>• Broker<br>• Distributor<br>• Manufacturer Representative | No.<br>Note that the Agile administrator can create or rename supplier types as needed. The supplier type assigned to your supplier organization may not appear on this list. Contact the Agile administrator or the Agile Organization Manager if you have questions about your supplier type. |
| **Lifecycle Phase** | Indicates if this supplier is active or not. | No |
| **Number** | Supplier number assigned to the supplier when it was created. | No |
| **DUNs** | The industry standard Data Universal Numbering System (DUNs) number. | Yes. If your supplier organization uses a DUNs number, enter that number here. |
| **Display Name** | | No |
| **Description** | Text that describes the supplier. The maximum length is set by the Agile administrator. | Yes. You may edit the description of your supplier organization. |
| **Web Supplier** | Indicates if this supplier logs in to the Web Client or receives offline communication (Yes / No). | Yes. To use the Agile Web Client to complete and submit RFQ Responses, you must set this field to Yes. |
| **Corporate Currency** | The default currency for this corporation. | Yes. Select a currency from the drop-down list. |
| **Address** | Address. | Yes. Enter the correct contact information for your supplier organization.<br>You *must* select a Country/Area. |
| **City** | City. | |
| **Country/Area** | Country. | |
| **Region/Province/State** | Region, Province, or State. | |
| **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. | No |
| **Maximum Number of Licensed Contact Users** | The maximum number of supplier users that can be assigned a concurrent user license. | No |
| **Max Number of Power Contact Users** | The maximum number of supplier users that can be assigned a power user license. | No |

## Buttons on the General Info Tab

The **General Info** tab contains the following buttons:

- **Edit** — appears when the **General Info** tab is not in edit mode. To edit the **General Info** tab, click **Edit**.
- **Save** — appears when the **General Info** tab is in edit mode. To save the changes that you made to the tab while it was in edit mode, click **Save**.

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

# Managing Contact Users

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

The **Contact Users** tab of your supplier organization profile lists all the users associated with or created for your supplier organization. Open your supplier profile object and click the **Contact Users** tab. (See "Viewing Your Supplier Profile" on page 3-1.)

Open your supplier profile object and click the **Contact Users** tab. The **Contact Users** tab displays all users in your supplier organization. You can click **Show Filter** to specify criteria for viewing only certain information on this tab. See "Using the Filter Tool" on page 1-4.

## Creating a Contact User

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

**To create a contact user:**

1. On the **Contact Users** tab, click **Create Users**. The Select Subclass Identify Name page of the Create User wizard is displayed.
2. The Enter General Information page appears. Enter all user details: the user's first name, last name, country, and email are required fields. Click **Next.**
3. Enter the username. Type the login password and retype it. Click **Next**.
4. The Define Preferences page appears. Specify system, format, and display preferences. Click **Finish** to create the contact user.

### *Required Fields*

- **User ID** – the username entered when the user logs in.
- **First Name, Last Name** – the user's name. The combination of the first name and last name is the Display Name, which appears in many objects when the user performs an action, for example, creating a discussion object, or is selected to perform an action, for example, an approver of a PCO.
- **Country/Area** – the country to which the user is assigned.
- **Email** – the user's valid email address. If the address is not valid, the user will not receive any email notifications.

### *Important Profile Fields*

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

- **Sites**, **Default Site** – Sites is the list of manufacturing sites the where the user is involved. The Default Site is the user's main base of work.

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

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

### Modifying a Contact User's Information

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

**To modify contact user information:**

1. Click the user ID link. The User page appears.
2. To change any information, click **Edit**.
3. Edit the information as necessary.
4. To enable or disable the user, select Active or Inactive in the **Status** drop-down list. A inactive user cannot log in to Agile and, therefore, cannot respond to RFQs.
5. To save the changes that you made to the User page while it was in edit mode, click **Save**. To undo the changes that you made to the User page while it was in edit mode, click **Cancel**.

### Changing a Contact User's Password

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

**To reset a user password:**

1. Click the user ID link. The User page appears.
2. Click the button. The Reset Password window appears.
3. Type the new password in the **Password** and **Confirm Password** fields, and click **OK**.

### Deleting a Contact User

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

**To delete contact user information:**

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

## Managing RFQ Routing

The **RFQ Routing** tab defines which contact users respond to RFQs coming from given ship-to locations. You can create RFQ routing rules from this tab.

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

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

**To create an RFQ routing rule:**

1. On the **RFQ Routing** tab, click **Create**. The Add RFQ Route wizard appears.
2. Select continent, country/area, and state/province/region in the corresponding drop-down lists.

3 Select the owner who should receive RFQs based on this geography, and click **Finish**.

**To edit an RFQ routing rule:**

1 On the **RFQ Routing** tab, select the routing rule that you want to modify. Click **Edit**.

2 Make the required changes. You can edit only the geographical information. To save the changes that you made to the **RFQ routing** tab while it was in edit mode, click **Save**. To undo the changes that you made, click **Cancel**.

**To delete an RFQ routing rule:**

1 Select the routing rule that you want to delete.

2 Click the **Delete**.

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

3 Click **OK** to delete the routing rule.

## Changing the Default Recipient

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

**To change the default recipient:**

1 Click the ... button next to the **Default Recipient** field on the **RFQ Routing** tab.

The Select User window appears.

2 Select the default recipient, and click **OK**. The changed default recipient is displayed in the **Default Recipient** field on the **RFQ Routing** tab.

## Defining Manufacturer Offerings

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

The manufacturer line card is a detailed list that maps each manufacturer whose goods you carry to a specific geographic location where those goods are available. This is a way to indicate the manufacturers whose goods you are franchised to offer in certain geographic regions. For example, a supplier called ACME Corp. might sell Motorola and Kemet products.

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

**Note** When you update the geographical information or ship-to locations for a manufacturer or commodity for a line card, the organization manager receives a notification in her inbox so that she can approve the line card offering.

### Creating a New Manufacturer Offering

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

**Note** When you create an offering, make sure the geographical data you specify isn't narrower than an existing offering for the same manufacturer or commodity. For example, if the **Region/Province/State** field for an existing offering is set to **All**, you can't create a new offering for the same manufacturer or commodity with the **Region/Province/State** field set to California because the existing offering covers a broader region.

**To create a new manufacturer offering:**

1 On the **Manufacturers** tab, click the **Create** button. The Create Manufacturer Offerings wizard appears.

2 On the Define Manufacturer Offerings page of the wizard, click the ... button to select the manufacturer. Searches are provided to lead you through the process of selecting a manufacturer. Click **Next**.

3 Select the **Geography** or **Ship To** radio button to define the offering by geographical location or ship-to location.

4 If you selected **Geography**, then specify the continent, country/area, state/province/region. If you selected **Ship To**, specify one or more locations.

5 Click **Finish** to complete the operation. The new manufacturer line card definition appears in the list.

### Deleting a Manufacturer Offering

You can delete a manufacturer offering.

**To delete an offering:**

1 On the **Manufacturers** tab, select the manufacturer offering that you want to delete. Click the **Delete** button.

2 A message appears for you to confirm whether or not you want to delete the offering. Click **OK** to delete the offering.

### Filtering the Manufacturers Tab

You can filter the **Manufacturers** tab to display only certain information. Click the **Show Filters** button to specify what information you want to see. For more information, see “Using the Filter Tool” on page 1-4.

## Defining Commodity Offerings

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

### Creating a New Commodity Offering

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

**To create a new commodity offering:**

1 Click the **Create** button. The Create Commodity Offerings wizard appears.

2 On the Define Commodity Offerings page, click the ... button to select the commodities. Searches are provided to lead you through the process of selecting the commodities. Click **Next**.

3 Select the **Geography** or **Ship To** button to define the offering by geographical location or ship-to location.

4 If you selected **Geography**, then specify the continent, country/area, state/province/region. If you selected **Ship To**, specify one or more locations.

5 Click **Finish** to complete the operation. The new commodity line card definition appears in the list.

### Deleting a Commodity Offering

You can delete a commodity offering.

**To delete a commodity offering:**

1 Select the commodity offering that you want to delete. Click the **Delete** button.

2 A message appears for you to confirm whether or not you want to delete the offering. Click **OK** to delete the offering.

## Filtering the Commodities Tab

You can filter the **Commodity** tab to display only certain information. Click the **Show Filters** button to specify what information you want to see. For more information, see "Using the Filter Tool" on page 1-4.

# CHAPTER 4
# Responding to Request for Quotes

*This chapter provides information about RFQs and RFQ Responses. It has the following sections:*



## Working with RFQ Responses

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

As the RFQ responder, you can:

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

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

You can respond to RFQs within PCM, or you can export the RFQ Response lines to a text file and use an external text editor to respond, such as Microsoft Excel. You view RFQ response information on a set of tabs on the RFQ Response object page. The following table describes each RFQ Response object tab and the actions you can perform from each one.

> **Note** For information about entering and submitting RFQ response information, see “Completing RFQ Responses” on page 4-5.

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

Table 4-1: RFQ Response tabs

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

## About the RFQ Response Process Flow

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

- View the Cover Page
- View attachments
- Enter responses
- Export responses (if you do not enter them in PCM)
- Import responses (if you exported them)
- Submit the response

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

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

## About RFQ Response Lifecycle Phase

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

Table 4-2: RFQ Response lifecycle phases

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

## RFQ Response Actions

The RFQ Response **Actions** menu allows you to:

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

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

### *Bookmarking RFQ Responses*

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

You can delete bookmarks you no longer need.

**To delete a bookmark:**

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

### *Sending RFQ Responses*

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

> **Note** When you send an RFQ Response, the ownership of the RFQ Response is not changed. If you want to transfer ownership of an RFQ Response to another user in your supplier organization, use the Forward action, described in “Forwarding RFQ Responses”.

**To send an RFQ Response:**

1. Choose **Actions > Send**. The send page appears.
2. Select the users or groups to whom you want to send the RFQ Response.
3. Enter any comments you wish.

   Your comments are included in the body of the email message.
4. Click **Send**.

### *Forwarding RFQ Responses*

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

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

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

**To forward an RFQ Response:**

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

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

### *Subscribing to an RFQ Response*

Subscribing to an Agile PLM object sets you up to receive notification of events that happen to that object. For example, you might subscribe to an RFQ Response to be notified when the response is forwarded to another user.

**To subscribe to an RFQ Response:**

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

### *Sharing an RFQ Response*

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

**To share an RFQ Response:**

1. Display the RFQ Response object.
2. Choose **Actions > Share**. The Access Control List: Share with Users page appears.

3 Click **Add**. The Identify Users page appears.

4 Select the users or groups you want.

5 Click **Next.** The Assign Roles page appears. Select appropriate role or roles for your chosen users or groups to have available in connection with this RFQ Response.

6 Click **Finish**. The ACL: Share with Users page appears again displaying the selected users and selected roles.

7 Click **Return**. This returns you to the original RFQ Response.

**To remove a user from the share list:**

1 Choose **Actions > Sharing** to display the Access Control List: Share with Users page.

2 Select the user you want to remove.

3 Click **Remove**.

4 Click **Return** to return to the original RFQ Response.

# Completing RFQ Responses

The sourcing manager in a buyer organization sends a request for quotes (RFQ) to your company. The RFQ responder receives the request and provides a response to the requestor. The responder becomes the owner of an RFQ Response object. You can access the RFQ Response in two ways:

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

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

# Using the Responses Tab to Respond to RFQs

**Note** Whether or not you can view the **Responses** tab of an RFQ Response object depends on the Response Edit Mode selected on the **Preferences** tab of your user profile. If the Response Edit Mode is set to Basic, you will not see any tabs when you open the RFQ Response. For information about changing your Response Edit Mode, see “RFQ Response Edit Mode” on page 2-2.

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

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

## Responses Tab

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

### *Responses Table*

The **Responses** tab includes at least the following fields:

- **AML Status** — The status of the manufacturer part for the item, for example, whether the manufacturer part is the preferred part or the alternate part.
- **Number** — The part number for the item listed. Manufacturer part numbers (MPNs) are indented under associated internal part numbers (IPNs). If the buyer has opted to not share IPNs, you are notified, and you cannot view the BOM. If an IPN leaf level or assembly does not have an associated AML, or if the buyer sets the quote level at an assembly level without an AML, the IPN appears.
- **Rev** — The revision of the item.
- **Description** — The description of the item.
- **Manufacturer** — The name of the manufacturer for the MPN.
- **Commodity** — The commodity name, for example, ICs, Resistors, or Diodes.
- **Bid Decision** — The decision to bid or not bid, and the reason for not bidding.
- **UOM** — Displays the quantity unit of measure.

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

### *Responses Drop-down Lists*

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

- **Responses** — Selections available are enter/modify, copy, and paste.
- **Alternates** — Suggests alternate parts, add attachments, and delete alternate parts.
- **Look Up**— Find pricing information.

### *Responses Buttons*

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

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

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

### *Response Line Lifecycle Status*

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

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

Table 4-3: Icons in the Response Line Status and Response Readiness Status columns of the RFQ responses table

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

Table 4-3: Icons in the Response Line Status and Response Readiness Status columns of the RFQ responses table (continued)

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

### *RFQ Price Scenarios*

On the **Responses** tab, you can select, in the **Price Scenarios** drop-down list, which price scenarios you want to display.

When you first display the **Responses** tab, the information appears according to the default price scenario.

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

**To view information for a selected price scenario:**

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

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

Table 4-1: Quantity breaks and target prices per period

| Item number | 10/01/04 - 12/31/04 QuantityBreak1 - Quantity | 10/01/04 - 12/31/04 QuantityBreak1 - Target Price |
|---|---:|---:|
| 10-007 | 1 | 0.04 |
| 10-008 | 10 | 12.80 |
| 10-009 | 1 | 0.04 |
| 10-010 | 10 | 16.60 |
| 10-011 | 1 | 0.04 |
| 10-012 | 1 | 0.09 |
| 10-013 | 5 | 2.95 |
| 10-014 | 100 | 122.00 |

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

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

## Entering and Modifying RFQ Response Information

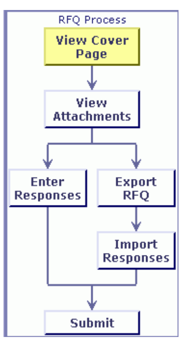
There are two basic ways to enter your response information into PCM:

- Online — Enter the information online in the Agile Web Client. (See "Creating Online Responses" below.)
- Offline — Export the selected response lines of the **Responses** tab to a file, edit the exported file in a spreadsheet program, such as Microsoft Excel, then import the edited file, with your data, into Agile PLM. (See "Creating Offline Responses" on page 4-12.)

## Creating Online Responses

In Agile PLM, the process flow appears in the navigation pane when you work with an RFQ. The process flow diagram displays each step in the response process, and you can click the diagram to move to the corresponding page or step.

Figure 4-2: RFQ process




The RFQ process diagram displays every step in responding to an RFQ:

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

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

### Online Edit Methods

You can enter response information online in three ways. You specify the method you want to use in your user profile. For information about setting the Response Edit Mode preference, see “RFQ Response Edit Mode” on page 2-2.

- Advanced Table Edit
- Advanced Wizard Edit
- Basic Edit

### Advanced Table Edit

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

**Note** You need to specify “Advanced Table Edit” in your user preferences.

**To specify user preferences:**

1. In Web Client, click My Settings.
2. Click User Profile link.
3. Click Preferences tab.
4. Click Edit.
5. Select Advanced Table Edit from the Display Responses Mode drop-down list.

**To enter response information using the Advanced Table Edit method:**

1. Make sure your Response Edit Mode preference is set to Advanced Table Edit.

   (See “RFQ Response Edit Mode” on page 2-2.)
2. Open the RFQ Response that you want to work with, and display the **Responses** tab.
3. Select the line or lines that you want to work with, and choose **Responses > Enter / Modify**. Or you can click **Enter Responses** in the navigation pane. The page is redisplayed in edit mode.
4. Select a different bid decision from the **Bid Decision** drop-down list, if appropriate.
5. For each quantity break, provide the material price and non-material price (if applicable).
6. Enter or change the quantity in the **Inventory Available** field.
7. Change the expiration date in the **Valid Until** field, if appropriate.
8. When you are finished, click **Save**, or click **Cancel** to return to the previous page without saving your entries.

   An icon appears next to any line item that has not been correctly completed. All valid fields are saved to the database, but you cannot submit a response to the sourcing manager until invalid required fields are completed. To complete an invalid entry, click the ? icon. That entire row switches to editable mode, with the invalid fields highlighted.
9. Once you save a response, the Ready icon appears in the Response Readiness Status field.

   **Note** You can copy response data values from one cell to another. Selecting the value to be copied and press Ctrl + c. Place the cursor on the destination cell, and press Ctrl + v to paste the copied value.

### Advanced Wizard Edit

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

**To enter response information using the Advanced Wizard Edit method:**

1. Make sure your Response Edit Mode preference is set to Advanced Wizard Edit.

   (See "RFQ Response Edit Mode" on page 2-2.)

2. Open the RFQ Response that you want to work with, and display the **Responses** tab.
3. Select the line or lines that you want to work with, and choose **Responses > Enter / Modify**. Or you can click **Enter Responses** in the navigation pane. The Response Entry Form wizard appears.
4. Complete the fields the same way as you do using the Basic method. (See "Basic Edit" on page 4-10.)
5. You can click **Propose Alternate** if you want to propose an alternate part. For information, see "Proposing an Alternate Manufacturer Part" on page 4-11.
6. The **Fill Right** button  can save you time. If you want the same value to appear in every column to the right of where you are entering a value, check the box beside the current value (for example, Material Price), and click the **Fill Right** button at the top of that column. The value is copied into the columns to the right.
7. Click  to save your entries and go on to the next item in the RFQ Response (if you selected more than one line item on which to bid).

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

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

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

### *Basic Edit*

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

### *Copying and Pasting Entries*

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

**To copy and paste an entry:**

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

### *Setting the Expiration Date*

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

**Note** This option is available only when the RFQ Response uses quantity breaks. This option is not available when the RFQ Response uses price periods.

**To set the expiration date:**

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

### *Proposing an Alternate Manufacturer Part*

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

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

**To propose an alternate manufacturer part:**

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

**Note** You can propose alternates only for IPNs with an AML; you cannot propose an alternate for an IPN only.

2 Choose **Alternates > Propose**, or from the Response Entry Form wizard, click **Propose Alternates.**

3 Enter the alternate manufacturer part number and description.

4 Click the button next to the **Manufacturer** list to search for the part's manufacturer. Click **Go.**

5 Fill out all the required information.

6 Click to save the information and go on to the next item. Or click **Finish** to return to the **Responses** tab.

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

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

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

1 Create a manufacturer and name it "New.' For more information on how to create a manufacturer, see *Agile Product Cost Management User Guide*.

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

2 Choose **Alternates > Propose**, or from the Response Entry Form wizard, click **Propose Alternates.**

3 Click the button next to the **Manufacturer** list to search for the part's manufacturer.

4 In the Search Objects wizard, Enter "new" in the Search field.

5 Click **Next**. You should see the manufacturer listed. Click **Finish.**

6 Click **Go.**

7 Fill out all the required information.

8 Click to save the information and go on to the next item. Or click **Finish** to return to the **Responses** tab.

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

### *Adding an Attachment for an Alternate Part*

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

**To add an attachment:**

1 On the **Responses** tab, select the alternate part to which you want to add an attachment.

2 Choose **Alternates > Add Attachments.** The Project Manufacturer Part Information page appears.

3 Click **Add > Files**, **Add > URLs**, or **Add > By Search.**

4 If you chose **Add > Files**, the Add File dialog appears.

   a To attach one or more files and create a file folder object containing those files, choose **Add | Files**. In the Add File dialog window, use the **Browse** button to locate the files you want.

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

   c When you have selected the files you want, click **Finish** in the dialog window. The file name and the newly created file folder object are listed in the Attachments table.

5 If you chose **Add > URLs**, the Add URLs dialog appears.

   a Enter the URLs. (You can copy a URL from your browser and paste it here.)

   b Click **Preview** to test each URL.

   c When you are through, click **Finish** in the dialog window. The URLs and newly created file folder objects are listed in the Attachments table.

6 If you chose **Add > By Search**, the Add Files Wizard appears.

   a Follow the instructions in the Add Files Wizard dialog window to search for and select the file folder you want, then Select files or URLs in that file folder that you want.

   b After the file folders have been added to the table, you can select them and click **Edit**, which allows you to modify the file folder version and files you want to attach.

7 To return to the **Responses** tab, click the RFQ Response link in the navigation path, at the top of the pane.

### *Deleting Proposed Alternate Parts*

You can delete alternate parts that you have proposed.

**To delete alternate parts:**

1 On the **Responses** tab, select the alternate part you want to remove. When you select an item, all its alternate parts are selected automatically. If an item has multiple alternate parts, you can select the item, then deselect the alternate parts you want to keep.

2 Choose **Alternates > Delete**.

## Creating Offline Responses

You can export items on the **Responses** tab to prepare a response. When you export items, Agile PLM generates a comma-delimited text file. The exported response file is named *RFQNumber*.csv. You can use a spreadsheet program, such as Microsoft Excel, to edit the file. You can also use a quoting tool to complete responses offline. After you complete the fields in a response file, you can import the file back into the Agile PLM system to submit the response to the sourcing manager.

### *Exporting RFQ Response Lines*

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

**To export RFQ Response lines:**

1 Select and open the RFQ Response you want to work with.

2 Click the **Responses** tab.

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

3 Select the items you want to export.

4 In the tab menu, choose **Responses > Export**.

5 Select either **CSV (Comma Separated)** or **Microsoft Excel Workbook**, and then click **Continue**.

The Get Attachment window appears.

6 Select the encoding type from the **Encoding Type** drop-down list. The default encoding type is Unicode (UTF-8). Whatever encoding type you choose, you must use that same encoding type to import the file after you have modified it.

Click **Continue**. The File Download dialog box appears.

7 Click **Save** to save the file to your computer.

8 When the download is complete, click **Close** in the Get Attachment window.

### *Importing Previously Exported RFQ Response Files*

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

**To import a RFQ Response file:**

1 Select and open the RFQ Response you want to work with.

2 Click the **Responses** tab.

3 Choose **Responses > Import**. The Import wizard appears.

4 Click **Browse**, select the file you want to import.

5 If you are importing a CSV file, click **Configuration** to select the encoding type. You must select the same encoding type used to export the file. Click **OK**.

6 Click **Import**.

### *Editing Supplier Response Fields in Exported Supplier Response Files*

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

- You can reorder column headings, but do not edit or add any data to the headings. If you modify column headings, the file cannot be imported.
- Do not add new columns of data.
- Do not modify any date fields except for EOL Date and Expiration Date.
- Do not enter values in any fields with the comment “do not fill out.” Those fields are not supposed to contain data, and the “do not fill out” comment is intended to prevent you from editing the fields. For component parts, Non-material Price fields should not be filled out. For assembly items, Material Price fields should not be filled out.
- A required field has an asterisk (*) to the right of its column heading. In the following figure, all columns shown are required.

Figure 4-1: Supplier response fields

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

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

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

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

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

### *Valid Values for Supplier Response Fields*

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

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

Table 4-3: Valid values for supplier response fields

| Field | Valid values | Note |
|---|---|---|
| Bid Decision | Bid<br>Bid - Alternate Part<br>No Bid - Non-Franchise<br>No Bid - Obsolete Part<br>No Bid - On Allocation<br>No Bid - Other<br>No Bid - Unknown Part<br>Not Responded | |
| Country of Origin | | Enter a valid country name. Make sure the spelling is correct. |
| NCNR | Yes, No | Non Cancellable Non Returnable |

Table 4-3: Valid values for supplier response fields (continued)

| Field | Valid values | Note |
|---|---|---|
| Terms of Sale | CFR | Cost and Freight |
| | CIF | Cost, Insurance, and Freight |
| | CIP | Carriage and Insurance Paid To |
| | CPT | Carriage Paid To |
| | DAF | Delivered at Frontier |
| | DDP | Delivered Duty Paid |
| | DDU | Delivered Duty Unpaid |
| | DEQ | Delivered Ex Quay (Duty Paid) |
| | DES | Delivered Ex Ship |
| | EXW | Ex Works |
| | FAS | Free Alongside Ship |
| | FCA | Free Carrier |
| | FOB | Free on Board Vessel |

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

# Viewing BOM Attachments

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

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

## Costed BOM View

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

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

**To use the Costed BOM View:**

1 Login as the supplier's contact person and open the RFQ.

2 On the **Responses** tab, click the **Costed BOM** button.

The Costed BOM View appears.

3 To view a specific price scenario:

a Select **Selected Price Scenario** in the **Scenarios** drop-down list. The Price Scenarios dialog box appears.

b Select the price scenario information in the All Price Scenarios list, and then click to add it to the Selected Price Scenarios list.

c Click **OK**.

4 To return to the **Responses** tab, click **Back**.

## Content BOM View

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

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

**To access the Content BOM view:**

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

## Assembly Cost Report

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

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

> **Note** For more information about working with reports, see the Agile Reports section of *Getting Started with Agile PLM*.

**To run the Assembly Cost (Supplier Response) report:**

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

   The tabbed report object page appears in the right pane.
3. To run a report, click the **Execute** button.

   The report wizard page appears.
4. In the Select Layout and Configuration step, click **Next** to choose the default layout.
5. In the Select Response step, select the RFQ Response you want to use in the Available Response drop-down list. Click **Next.**
6. In the Select Items step, click ... to the right of the Assembly Lines field choose the assembly lines (BOMs) you want.

   Select the assemblies you want and use the arrow buttons to move them to the Selected Values list. Click OK.
7. In the Select Items step, choose the price scenarios you want in the report. Your choices are outlined below.

   **To select one or more price scenarios:**

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

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

**To select the current and previous price periods:**

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

a Select the second radio button option.

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

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

a Select the third radio button option.

b In the first drop-down list, select the number of price periods you want to use in the report.

Define the starting price period by showing how it relates to the current price period.

c Use the second drop-down list to select + or -. (Plus means you want to start after the current price period. Minus means you want to start prior to the current price period.)

d Enter a number in the field to show how many price periods + or - the current price period to start.

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

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

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

## Submitting Responses

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

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

**To fill in an incomplete response line:**

1 Click the Invalid icon ? in the Response Line Status column to the left of the item number. The Response Entry Form for the item appears, or the page switches to edit mode, depending on which response entry method is specified. (See "RFQ Response Edit Mode" on page 2-2.) The invalid fields are highlighted.

2 Modify the invalid fields.

3 When you are finished, click **Finish**.

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

**To submit a line item:**

1 Select one or more RFQ response lines on the **Responses** tab. If you're using the Basic method, all items are automatically selected.

2 In the tab menu, choose the **Responses | Submit**. If there are lines with incomplete information, an error message appears on the **Responses** tab. The completed lines are immediately submitted to the sourcing manager. The invalid or incomplete lines are not submitted.

**To submit the complete RFQ:**

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

# Reviewing RFQ Response Changes

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

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

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

## Reviewing Changes to Response Lines

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

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

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

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

## Changing Submitted Responses

If you have the appropriate privileges, you can make changes to submitted line items. Usually, you cannot make changes if the line item or RFQ status is locked or closed. See “Entering and Modifying RFQ Response Information” on page 4-8. You cannot submit responses if the RFQ status is locked or closed.

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

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

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

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

# Using Discussions

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

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

## Adding a Discussion

You can add discussions based on different subjects.

**To add existing discussions:**

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

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

**To create a new discussion:**

1. Open the RFQ Response, and click the **Discussions** tab.
2. Click **Add**. The Add Discussions wizard appears. You can search for existing discussions, or you can create a new discussion.
3. In the Add Discussions Wizard, select **Create**. Select the discussion type from the drop-down list.
4. Click **Next**. The Enter General Information page appears.
5. Enter the subject in the **Subject** field.
6. Enter discussion text in the **Message** field.
7. Select the priority from the **Priority** drop-down list.
8. Click the ... button next to the **Notify List** field, and select the names of recipients.
9. Click **Finish**.

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

## Replying to a Discussion

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

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

1. Open the RFQ Response and click the **Discussions** tab to bring it forward.
2. Click the radio button to select the discussion you want.
3. Click the Reply button on the **Discussions** tab. The Discussion Reply window appears.
4. Enter the reply in the **Message** field.
5. Click the ... button next to the **Notify List** field, and select the names of recipients.
6. Click **Save**.

**To reply to discussions:**

1 Open your inbox.

2 Click the text in the Regarding field to open the discussion notification. The **Cover Page** tab of the discussion appears.

3 Display the **Replies** tab.

4 Click **Add**. The Discussion Reply window appears.

5 Enter the reply in the **Message** field.

6 Click the ... button next to the **Notify List** field, and select the names of recipients.

7 Click **Save**. The reply is added to the list on the **Replies** tab.

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

## Removing Discussions

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

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

1 Open the RFQ Response and click the **Discussions** tab to bring it forward.

2 Click the radio button to select the discussion you want.

Or, expand the discussion (click ⊞ ) and select the specific discussion lines you want.

3 Click **Delete** on the **Discussions** tab.

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

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

# CHAPTER 5
# Collaborating on Pricing and Contract Information

*This chapter describes how to managing price objects and price change orders. It has the following sections:*



## About Prices

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

The process of managing prices involves three objects:

- **Price** — This is where you record the prices for items or manufacturer parts. A price is a routable object, so it follows a workflow. A price object can have multiple price lines. You can add it to any PCO without having to create a new PCO.
- **Price Line** — Price lines contain the core price information about an item or manufacturer part, which is unique by quantity, ship-to location, and effectivity period. You can create any number of price lines within a price object, but they should be uniquely identified. Price lines have the general information of the price object. A Price object may have multiple Price Lines, because several of the price and terms attributes are dependent on the context (for example, Ship-To Location).
- **Price Change Order (PCO)** — A price change order is the route for revising or deleting the price information about an object. A price change order follows a workflow from the Preliminary through the Signoff phase. A PCO can have multiple price objects, and a price can be added to any existing PCO.

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

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

## Creating Prices

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

- From the **Create** menu.

  As a supplier user, this is the method you will use to create price objects. This is the method discussed in this manual.

- Using the **Import** command.

  For more information about using the Import command, see *Getting Started with Agile PLM*.

- By publishing action from a sourcing project.

  This method is appropriate only for the sourcing manager user.

**To create a price:**

1. Choose **Create > Price > Published Price**. The Select Subclass, Identify Name page of the Published Prices Creation Wizard appears.

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

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

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

6. Select the supplier from the drop-down list. When you create a price object, select your own supplier organization.
7. Select the program from the drop-down list.

   **Note** If the program is selected, the item price information applies only to that program. If All is selected, then the item price information applies to all programs.

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

   **Note** If a customer is selected, the item price information applies only to that customer. If All is selected, the item price information applies to all the customers.

9. Click **Next**. The Enter Title Block Information window appears.

**To enter Title Block information:**

1. Enter any information about the price in the **Description** field.
2. Click the button next to the **Owner** field, and select the owner from the list.
3. Click the button next to the **Authorized Suppliers** field, and select the authorized suppliers of the item from the list.
4. Select the end of life date of the item or manufacturer part from the **Part EOL Date** calendar.
5. Enter the minimum quantity that should be ordered in the **Min** field.
6. Enter the number of units in a package in the **Mult** field.

7 Enter the available stock in the **Inventory** field.

8 Enter the flex field information as required.

9 Click **Next**. The Add Price Line window appears. For information about adding price lines, see “Adding Price Lines” on page 5-5.

10 Click **Next** in the Add Price Line window. The Add Attachments window appears. Add attachments as necessary, and click **Finish**. For information about adding attachments, see *Getting Started with Agile PLM*.

## General Information Tab

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

- **Mfr. Part Number** — The unique identification number of the item for which the price is intended for.
- **Mfr. Name** — The name of the manufacturer.
- **Supplier** — The supplier of the item.
- **Price Type** — The type (subclass) of the price object. The default types are Contract, Published Price, and Quote History. The Agile administrator can rename the price types or create additional price types.
- **Number** — The unique identification number of the price object.
- **Description** — The description of the price object.
- **Lifecycle Phase** — The lifecycle phase of the price.
- **Version** — The version of the price.
- **Allow Qty Breaks** — A flag indicating whether the price information applies to quantity breaks or not.
- **Owner** — The user responsible for the price information.
- **Customer** — The customer to which the price information applies. If customer is not specified, the price information applies to all customers.
- **Program** — The program for which the price information applies. If program is not specified, the price information applies to all programs.
- **Manufacturing Site** — The site where the item is being manufactured. The price information applies only to the item manufactured at that site.
- **Authorized Suppliers** — The other authorized suppliers supplying the item.
- **Part EOL Date** — The end of life date of the item.
- **Min** — The minimum quantity for which the price information applies.
- **Mult** — Indicates that the packaging delivers the item in multiple units; this value states how many are in each package.
- **NCNR** — The Non Cancelable Non Returnable flag for the item.
- **Inventory** — The available inventory.
- **Version Release Date** — The date the price was released.
- **Effectivity Date** — The date the price information comes into effect.
- **Contract Number** — The number of the associated contract.
- **Flex fields** — The other flex fields defined by your system administrator.

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

## Changes Tab

The **Changes** tab displays pending and historical changes that affect the price. Any unreleased price change orders 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 automatically fills in the information on this tab. The changes listed are those that apply to the revision specified in the **Rev** field at the top of the page.

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

### *Viewing a Change on the Changes Tab*

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

- Pending Changes Table

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

- Changes History Table

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

## Price Lines Tab

A price line is a unique combination of ship-to location, ship-from location, effective-from date, effective-to date, and quantity that applies to a price. A price can have multiple price lines, based on specific contexts.

Overlapping price lines can occur when all or some of the effectivity periods of one price line fall within the effectivity periods of a second price line, and all other attributes are the same.

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

The **Price Lines** tab includes the following fields:

- **Ship From —** The place the item is shipped from.
- **Ship To —** The place the item will be shipped to.
- **Price Effective From Date —** The date the price takes effect.
- **Price Effective To Date —** The date the price no longer applies.
- **Qty —** The quantity (in its own unit of measure) for which the price applies.
- **Conversion Date —** The currency conversion date.
- **Conversion Rate —** The rate at which the currency will be normalized to the project currency.
- **Currency Code —** The unique identification code for the currency.
- **Total Price —** The total price, including both total material price and total non-material price.
- **Total Material Price —** The total material price of the item.
- **Material Price —** The per unit material cost of the item.
- **Total Non Material Price —** The cost of the item not associated with materials, for example, labor rate, sales tax, and other over heads.
- **Non Recurring Cost —** The one time cost which shall be applicable when the buyer first buys the item.
- **Lead Time —** The number of days required to supply the item.

- **Transportation Terms —** The terms and conditions for transporting the items.
- **Country of Origin —** The country where the item is manufactured.
- **PriceLine Notes —** Any specific information about the price line.
- **Project Number —** The unique identification number of the project if the price line is associated with the project.

#### *Adding Price Lines*

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

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

#### *Removing Price Lines*

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

To remove a price line, select the checkbox of the price line and click **Delete**.

#### *Editing Price Lines*

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

To edit a price line, select the checkbox of the price line and click **Edit**. Modify the price line details, and click **Save**.

### Price Lifecycle Phases

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

- Preliminary
- Active
- Inactive
- Obsolete

## About Price Change Orders

You control any changes that need to be made to prices through a price change order (PCO). PCOs are routed through workflows, from the Pending phase through the Released phase. Through a PCO, you can release a price, redline the price information, and track the history of the price information.

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

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

Table 5-1: Price Change Order tabs

| Tab name | Tab information includes |
|---|---|
| **Cover Page** | General information about the PCO plus any unique fields defined by the Agile administrator. See "Cover Page Tab" on page 5-7. |
| **Affected Prices** | Which price objects are affected by the PCO. PCOs include redlined price lines, and file folders (attachments). "Affected Prices Tab" on page 5-10. |
| **Workflow** | Approvers and observers of the PCO and the results of their reviewing the PCO.<br>For more information about working with routable objects and workflows, see the chapter about routing objects with workflows in *Getting Started with Agile PLM*. |
| **Relationships** | Lists objects that affect the status of the PCO and lists objects whose status is affected by the PCO.<br>For more information about relationships, see the section about relationships and references between objects in *Getting Started with Agile PLM*. |
| **References** | Lists links (references) to other objects. For more information about references, see the section about relationships and references between objects in *Getting Started with Agile PLM*. |
| **Attachments** | Lists the references to attached files and URLs contained in file folder objects.<br>For more information about file folders and attachments, see the chapter about working with file folder objects and attachment files in *Getting Started with Agile PLM*. |
| **History** | All actions taken on the change. |

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

## Creating PCOs

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

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

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

You can create PCOs from prices or from the **Create** menu on the main menu bar. When you create a PCO from the price (**Actions | Add to Change**), the price is associated with the PCO by default. When you create the PCO from the **Create** menu, you must associate the price with the PCO manually.

**To create a PCO from the Create menu:**

1. Click **Create** **> Change > Price Change Orders**. The Price Change Orders Creation Wizard appears.
2. Select PCO from the **Subclass** drop-down list.
3. Enter a unique identification number for the PCO, or click 123 to assign a system-generated number.
4. Click **Next**. The Enter Cover Page Information page appears.

   For more information about Cover Page fields, see Table 5-2.
5. Select a category from the **Change Category** drop-down list.
6. Enter the description of the change and the reason for the change in the corresponding fields.
7. Select the reason code and workflow from the corresponding drop-down lists.
8. Select the price administrator to whom the PCO should be forwarded from the drop-down list.

9. Select the originator from the lookup list. By default, the originator is the user who creates the PCO.
10. Select the date the PCO originated from the calendar, if it is different from today's date.
11. Select the affected product lines from the lookup list.
12. Click **Next**. The Affected Prices page appears.
13. Click **Add** to add the price of the item. The Identify Prices window appears.
14. Search for the price, or create a new price. For information about searches, see *Getting Started with Agile PLM*. For information about creating prices, see "Creating Prices" on page 5-2.
15. Click **Next**. The Add Attachments page appears.
16. Click **Add** to add references to files relative to the PCO. For more information about attachments and file folders, see the chapter about working with file folder objects and attachment files in *Getting Started with Agile PLM*.
17. Click **Finish**.

**To create a PCO from the price object:**

1. Open the price object.
2. Choose **Actions > Add to Change**. The Identify PCO window appears.
3. Select the **Create** button in the **New Change** section.
4. Select PCO from the **Change Type** drop-down list.
5. Click **Next**. The Create New PCO window appears.
6. Enter a unique identification number for the PCO, or click  to assign a system-generated number.
7. Click **Next**. The Information window appears, displaying the current values for the price object.
8. Edit the values as required.
9. Click **Finish**.

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

On the **Attachments** tab you can add references to files relative to the PCO. For more information about attachments and file folders, see the chapter about working with file folder objects and attachment files in *Getting Started with Agile PLM*.

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

## Adding the Current Price Object to an Existing PCO

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

1. Open the price object.
2. Choose **Actions > Add to Change**. The Identify PCO window appears.
3. Select the search method you want and click **Next**.

   For more information about searches, see *Getting Started with Agile PLM*.
4. In the search results, select the PCO you want and click **Next**.
5. In the next wizard step, fill in the affected price information and click **Finish**.

## Cover Page Tab

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

### *Buttons on the Cover Page Tab*

The **Cover Page** tab has the following buttons:

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

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

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

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

### *Fields on the Cover Page Tab*

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

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

Table 5-2: Cover Page tab fields

| Field | How completed | Contents |
|---|---|---|
| **Number** | Automatically, when created. | The number assigned to the change when you create it. |
| **Status** | Automatically, when created; updated as the change moves through the assigned workflow. | Change status, described in "Status on the Cover Page Tab"; if no workflow has been selected, this field is Unassigned. |
| **Change Type** | Automatically, when created. | The type (subclass) of change selected when you create the change. |
| **Change Category** | Usually manually; can contain a default. | Drop-down list of categories defined by the Agile administrator. |
| **Description Of Change** | Usually manually; can contain a default. | Enter a meaningful description of the PCO. |
| **Reason For Change** | Usually manually; can contain a default. | Enter the reason you are changing the price objects. |
| **Reason Code** | Usually automatically, when created (with the default set by the Agile administrator). | Drop-down list of categories defined by the Agile administrator. |
| **Workflow** | Automatically (if only one workflow applies to the change), when the change is moved to the next status from the Unassigned status.<br>If more than one workflow applies to the change, the workflow is selected manually; the workflow selection can be changed as long as the change is in the Pending status type. Selecting the blank field in the **Workflow** drop-down list switches the change to the Unassigned status. | The name of the workflow being used to move this change through the change control process. |

Table 5-2: Cover Page tab fields (continued)

| Field | How completed | Contents |
|---|---|---|
| **Price Admin** | May be provided automatically by the workflow; otherwise selected manually from a drop-down list. User groups appear first in the list, followed by individual usernames. | Default routing manager.<br>If the workflow is defined to notify the default price administrator, the user group or user in this field receives notifications about the PCO. If this field is left blank, then the notifications are sent to every price administrator on the list. If the notification definition in the workflow is blank, no notifications are sent. |
| **Originator** | Usually automatically, when created (with the default set by the Agile administrator). | The user who created the change (can be selected from a drop-down list). |
| **Date Originated** | Usually automatically, when created. | The date the change was created. |
| **Date Released** | Automatically, when released. | The date the change was released. |
| **Final Complete Date** | Automatically, when the change enters the Complete status type. | The date the change moved into the Complete status type. |
| **Product Line(s)** | Usually manually; can contain a default. | Drop-down list of categories defined by the Agile administrator. |

### *Status on the Cover Page Tab*

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

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

Table 5-3: Default workflow PCO status stamps

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

The **Workflow** tab shows all the statuses the change has been through and the statuses remaining to complete the change control process. (See "Workflow Tab" on page 5-11.)

## Affected Prices Tab

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

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

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

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

## Adding Prices

**To add a price to the Affect Prices tab:**

1. On the **Affected Prices** tab, click **Add**.

   The Add Affected Prices wizard appears.
2. Select a search method to find the price you want, or create a new price.
   - In the search results, select the price you want and click **Next**.

     Follow the wizard steps to enter the required information.
   - Or, choose Create New Price, select a type in the drop-down list and click **Next**.

Follow the wizard steps to enter the required information. For more information about creating prices, see "Creating Prices" on page 5-2.

## Removing Prices

**To remove a price from the Affected Prices table:**

1. On the **Affected Prices** tab, click to select the rows of the prices you want to remove.
2. Click **Remove**.
3. When you are prompted to confirm the removal, click **OK**.

## Editing Prices

**To edit affected prices information in the Affected Prices table:**

1. On the **Affected Prices** tab, click to select the rows of the prices you want to edit.
2. Click **Edit**.

   You can now modify the editable fields in the table rows you selected.
3. When you are finished, click **Save**.

## Creating, Editing, and Viewing Price Redlines

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

**To open the Redline tab:**

1. On the **Affected Prices** tab, click the **Do Redlining** icon  in the row of the price you want to redline.

   The **Price List Redline** tab and the File Folders tab (for redlining attachments) appear.
2. Check the rows that you want to redline on this page, then click **Edit**. To add price lines to the price, click **Add**.

   Editing, deleting, and undoing redlines affects only the checked prices on the **Price List Redline** tab.

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

The Price List Redline tab has the following buttons:

**Edit** – lets you redline the selected rows of the Redline price table.

**Delete** – redline-deletes the selected price line from the price.

**Undo Redlines** – clears the redlines from the selected rows.

**Add** – lets you redline-add price line to the price.

## Workflow Tab

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

**Note** For detailed information about working with the **Workflow** tab of routable objects, see the chapter about routing objects with workflows in *Getting Started with Agile PLM*.

For example, suppose a PCO is returned to the originator, reworked, and then resubmitted for a second approval cycle. The **Workflow** tab shows the approvals and rejections of the PCO made during the first approval cycle and during the second approval cycle.

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

- Workflow Overview Section
- Summary Table
- Signoff History Table

### *Workflow Overview Section*

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

Some of the statuses in the flow chart are links. Links are underlined. You can switch the change to one of these statuses by clicking the link and filling in the **Notify** field. You need sufficient privileges to do this.

The status with an orange background is the current status.

### *Summary Table*

The Summary table (visible for changes in a Review or Released status) lists the signoff information for the current state. It has the following columns by default; the Agile administrator may have modified the table:

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

### *Signoff History Table*

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

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

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

## User Action Timestamp

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

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

  For example, if Mary approves a change at 12 noon in New York (Eastern time), when John looks at the **Workflow** tab of the change in California, he sees the time Mary approved the change as 9 o'clock in the morning (Pacific time).

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

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

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

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

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

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

# APPENDIX A
# Glossary

*This glossary includes terms for all aspects of Product Cost Management.*

## A

**action** — Displayed on the History tab of a project, request for quote (RFQ), item, contract, manufacturer, supplier, user, and manufacturer part. Displays the actions that have occurred as part of history tracking.

**alternate manufacturer part** — Manufacturer part substituted for an originally specified part.

**AML** — See approved manufacturers list.

**AML icon** — Indicates that an approved manufacturers list (AML) exists for a given item.

**AML split** — Business splits at the approved manufacturers list level. Business splits specify that each manufacturer part in the AML should be used a specified percentage of the time. For example, you can specify that one part should be bought 60% of the time, while another part should be bought 40% of the time.

**AML status** — Status of a manufacturer part. The default AML status options are Alternate and Preferred. The administrator can rename the default status options from the Settings page. In this case, the AML status options would have custom names.

**approved manufacturers list** — A list of all manufacturer parts that can be used for a given IPN.

**attachment** — A file that can be attached to an object, such as an item, a manufacturer part, a manufacturer, a contract, and a supplier. Attached files are contained in File Folder objects and referenced from the Attachments tab of Agile objects. The attachment icon indicates that an attachment exists for an item or manufacturer part.

**autonumber** — Automatic numbering schemes that are created by the administrator. You can choose from available autonumbers when creating new projects or RFQs.

## B

**bid** — The supplier sets a response status for an item to Bid if they plan on bidding on that item. The supplier needs to complete the remaining response fields prior to submission. The bid status is automatically set to Bid if a supplier starts to enter data for the response fields of an item.

**bid decision** — Set by the supplier for each response line. Indicates whether or not the supplier has bid on the item, and if not, why. Types of bid decisions include:

- Bid — the supplier plans to bid on the item.
- Bid Alternate Part — the supplier proposes an alternate bid for the item.
- No Bid — the supplier does not plan to submit a bid.
- No Bid-On Allocation — the part is on allocation; the supplier is not bidding.

- No Bid-Non Franchise — the supplier does not have the proper franchise to sell the part.
- No Bid-Obsolete Part — the part is obsolete; the supplier is not bidding.
- No Bid-Unknown Part — the part is unfamiliar, or the supplier is not aware that it exists.
- No Bid-Other — there is some other reason the supplier is not bidding.

**bill of material** — Hierarchical list representation of items in a project and the relationships between them.

**BOM** — See bill of material.

**BOM/Component icon** — Indicates if an item is an assembly, a subassembly, or a leaf component.

**Bookmark** — Similar to the Bookmark or Favorites feature of your Web browser; you can create bookmarks for the object you are viewing (from the **Actions** menu on the page).

## C

**Closed status (project and RFQ)** — Owner or authorized user can close an RFQ or project when work is completed and no more action is required. After it is closed, all users will only have read privileges. Only a sourcing manager can close an RFQ or project after the supplier responses are complete or the process is finished.

**commodity** — Grouping of parts that have similar purposes and characteristics, such as resistors, capacitors, and integrated circuits.

**commodity line card** — Commodity line cards are used to map each commodity carried by a supplier to a specific geographic location where those goods are available. Commodity line cards are used to assign RFQ items to suppliers when a sourcing manager disseminates the RFQ by commodity.

**contact (owner)** — The name of the RFQ owner, as viewed by the supplier on an RFQ Response.

**contract** — Predefined agreement between a purchaser of production materials and a supplier. Usually specifies a given price for certain parts over a specified time period.

## D

**data to share** — Sourcing managers specify this for suppliers when creating a project, and it can subsequently be modified in the project or RFQ; data-to-share fields determine what data the suppliers can view and access.

**Date Sent field** — Date and time when an RFQ Response is sent to a supplier.

**default currency** — Assigned to a project when it is created. All currencies not the same as the default currency are normalized to the default.

**delimited text file** — Text file format with each field of data separated by a delimiter character, such as a comma or a tab.

## E

**electronic manufacturing service (EMS)** — Contract manufacturers that can subcontract to other EMS providers.

**end-of-life date** — Applies to items and manufacturer parts; indicates when the item or manufacturer part will no longer be reproduced.

**expanded BOM** — A list of the individual components and subassemblies that make up a parent assembly. The expanded BOM shows quantities and other information about each part.

**expiration date** — The date that a quote response expires. After that date the supplier no longer supports that price, and the sourcing manager has to request a new one.

**exploded assembly** — The components that make up a major assembly for a final product.

**extended price** — Calculated currency field that equals the unit price multiplied by the quantity.

**extended total cost** — A calculated currency field that equals the sum of the material total and non-material total multiplied by the quantity.

## F

**file description** — For attached file.

**flex fields** — Custom fields that are user-definable and can be associated with items, manufacturer parts, projects, responses, contracts, suppliers, the AML rating, price adders, and non-material prices. Flex fields are set by the administrator.

## H

**history** — A list of all actions previously performed.

**Home page** — The page that appears when you log into Agile PLM, unless you set preferred start page to something else. The links on the Home page vary according to your user role.

## I

**internal part number (IPN)** — Unique number assigned to a part; used for internal reference. This part can be associated with one or more manufacturer part numbers (MPNs).

**Invalid icon** — Indicates that data on a response line is incomplete.

## L

**last viewed date** — The last date an attachment was viewed.

**lead time** — Indicates the amount of time it would take for a supplier to deliver the goods if the supplier did not have inventory.

**leaf component** — An individual component that does not have any children reporting to it.

**line card** — See commodity line card, manufacturer line card, and supplier line card.

**Locked status (RFQ)** — Set by sourcing managers. Indicates that suppliers can no longer submit responses for the locked response line or the entire RFQ.

## M

**manufacturer line card** — Manufacturer line cards are used to map each line of manufacturer goods carried by a supplier to a specific geographic location where those goods are available. Manufacturer line cards are used to assign RFQ items to suppliers when a sourcing manager disseminates the RFQ by manufacturer.

**manufacturer part number (MPN)** — Number assigned to a part by the manufacturer, which may be different from an individual part number that is created for internal purposes only.

**manufacturer split (%) field** — Displays the name of manufacturer associated with a manufacturer part. If the percentage sign appears next to the name, it means that the manufacturer/manufacturer combination is part of an approved manufacturer list (AML) split for a given item.

**mapping file** — An XML file used by the Import Wizard to map fields in the source data before importing them to target Agile fields.

**material cost (of assembly)** — The sum of the material prices that make up all the components in the assembly.

**material price** — Provided for items or manufacturer parts. Does not include price adders or non-material prices.

**Material Total field —** Displays the calculated price that sums the material price and provided price adders. Does not include non-material prices.

**MFR —** Manufacturer name associated with a given manufacturer part.

**Min field —** Displays the minimum number of parts a sourcing manager must buy of a specific item. For example, even though a sourcing manager wants to purchase a quantity of 13 items, the supplier can indicate that they will sell only a minimum of 50.

**MPN —** See manufacturer part number.

**Mult field —** Indicates that the packaging delivers the item in multiple units; this value states how many are in each package. For example, a sourcing manager may want to purchase three lots, plus 23 individual items, but a supplier may indicate that the items come only in lots of 25 and that those packages cannot be broken.

## N

**NCNR —** Non-cancelable/non-returnable. Indicates that once a sourcing manager places an order for items, the sourcing manager cannot cancel that order or return the items when received.

**New status —** For requests for quotes. The supplier has not yet viewed the RFQ.

**Non-material Total field —** Sums all prices in the **Non-material** custom fields. Does not include the material price or the material total price.

**non-recurring engineering cost —** A one-time charge that will not apply each time the item is purchased. These are fixed setup costs for making the part, and are not included in the per-unit cost.

**normalized currency rate —** The normalized currency is the default currency of the project or RFQ. The normalized currency rate takes the supplier currency responses and applies the conversion rate to the default currency.

**notification —** Notifies you of any changes made or tasks required. Appears in the Notifications area of the Workbench, and can be received via email if that option is selected.

**notification status —** Status of New means you have not yet viewed the notification. Status of Read means that you have viewed the notification.

## O

**OEM —** Original equipment manufacturer.

**Open field —** Appears on the Status tab of an RFQ and indicates the number of requotes that have been sent to a specified supplier without a response being received.

**original currency rate —** The rate at which a supplier responded.

**owner (RFQ Response) —** The owner of an RFQ Response is the person responsible for completing the response lines and submitting the responses. The current owner can assign ownership to someone else.

## P

**partners —** Suppliers to which sourcing managers have outsourced the manufacturing of an assembly or sub-assembly of a BOM, typically when an OEM outsources to an EMS provider. This feature lets sourcing managers assign an assembly or sub-assembly to an outsourced partner, thereby assigning all items in that BOM to the partner. This feature also lets sourcing managers assign partner splits to partners if the sourcing manager has outsourced to multiple partners.

**Partner (split %) field** — Displays the names of suppliers that have been assigned as partners to an assembly or subassembly within a project. Partner splits let sourcing managers specify business splits for the assembly or subassembly based on electronic manufacturing services (EMS) who manufacture a percentage of the total demand for the assembly or subassembly.

**Progress** (%) **field** — Appears on the Cover Page tab of an RFQ Response. It indicates the percentage of completed responses.

**period type** — Determines the frequency of the pricing period, such as monthly, quarterly, semi-annually, yearly, or variable.

**preferred AML status** — The manufacturer or manufacturers who are preferred to supply specific parts.

**preferred manufacturer part** — See preferred AML status.

**Price Adders fields** — Added to the quoted materials price to make up the total materials price. The application administrator sets the Price Adder fields, which are custom fields. These fields can be named as desired to specify them as a fixed price or a percentage.

**price period** — Represents a date range for which the provided price information applies. Each price period can include one or more quantity specifications.

**price scenario** — Determines pricing parameters in a project. Can be based on quantity breaks or price periods.

**price source** — Indicates the source of the pricing information; the result of lookup for contracts, historical prices, published prices, or edited by a sourcing manager.

**process flows** — Graphic representations of a process, such as creating a project or request for quote. Displayed in the navigation pane, because it lets you navigate between different steps in the creation process.

**product lines** — A grouping of similar products.

**program** — Project and pricing information for a specified end customer.

**project** — A project holds the data the sourcing manager gathers during his product sourcing activities, such as adding items, BOMs, and AMLs.

**project status** — For projects, the status can be Open or Closed. Some status changes are system-driven, while others are specific changes made by the sourcing manager.

**published prices** — Selected pricing that is published to the Item Master for other sourcing manager users to leverage in future sourcing activities, via the lookup feature. Represents the best-known pricing in the organization.

## Q

**QPA** — See Quantity Per Assembly field.

**quantity available** — Available inventory quantity for a given item.

**quantity breaks** — The price for different quantities of a part. Projects can be based on the quantity break price scenario.

**Quantity fields (1–6)** — Display the desired quantity for an item.

**Quantity Per Assembly (QPA) field** — Displays the quantity of an item that is necessary to build one product on a given bill of material (BOM).

## R

**read** — Timestamp indicating when a notification is read.

**received** — Timestamp indicating when a request for quote or a notification is received.

**Received status** — Indicates that a request for quote response line has been received from the specified supplier.

**request for quote** (**RFQ**) — Prepared by sourcing managers to send to RFQ Responses to suppliers for price quotes on materials and non-materials needed for a product. Lets sourcing managers track the supplier response, RFQ Response status, changes to the items in an RFQ, changes to supplier responses, and view attachments and history details.

**requote** — A negotiation process whereby a supplier resubmits a response.

**response data requirements** — A sourcing manager defines what each supplier response must contain. These requirements can be customized for each RFQ or project.

**response status** (supplier) — Each item (part or MFR part) in an RFQ has an individual response status. The response status is set by the system based on supplier activity. The response status types for suppliers are:

- New – Supplier has not yet completed a response for this item.
- Ready – Response is complete, but has not yet been submitted.
- Submitted – Response is complete, and has been submitted.
- Invalid – Required fields are missing and the response cannot be submitted as is.

**RFQ** — See request for quote.

**RFQ dissemination** — Assignment method in the RFQ creation process that lets sourcing managers automatically assign IPN/MPNs to a supplier based on certain criteria, such as line card and supplier ratings.

**RFQ due date and time** — Informs suppliers of when an RFQ Response is due.

**RFQ progress** — The overall response progress for a request for quote (percentage of line items that have been submitted).

**RFQ Response** — The Agile object a supplier uses to submit responses to the corresponding RFQ.

**RFQ routing** — Sets up information about how an RFQ needs to be routed within the supplier company when it is received.

**RFQ Response status** — Displayed on the Supplier inbox. The types of status include:

- New — Supplier has not opened the RFQ Response.
- Open — Supplier has viewed the RFQ Response and may be in the process of responding.
- Locked — Supplier may not submit new responses until the status is changed to Open. Only a sourcing manager can lock or unlock an RFQ Response.
- Closed — Once the RFQ is closed, the supplier can no longer send responses.

**Requote status** — Indicates that a sourcing manager would like to conduct negotiations, and has requested that a supplier submit another response for an item to which they have already responded.

**Rev field** — Displays the revision number associated with an item.

## S

**sent by** — Name of the original sourcing management organization that sent a request for quote. Notifications are sent by the system.

**set expiration** — Lets a supplier set an expiration date for the prices the supplier made for a particular RFQ.

**set target price** — Lets a sourcing manager set a target price for a quote as a percentage of the standard cost or by entering the value manually.

**Ship To Location** — Represents a geographic location at which a company operates. This location is defined by a location name, a location code, and three geographical attributes: continent, country/area, and state/province/region.

**Size field** — Displays the size of an attached file.

**Source field** — Based on results from looking up data or when a sourcing manager edits a supplier response line. Also see Price Source.

**Standard Cost field** — Currency field providing the standard cost that you set for an item. Standard cost information is imported as an attribute of an item or manually entered on the Prices tab for an item.

**standard lead time** — The amount of lead time it takes for a supplier to deliver goods if inventory is not available.

**Std cost** — Standard cost of an item. See Standard Cost field.

**Supplier field (split %)** — Displays the name of a given supplier. If a percent sign appears next to the name, the supplier was added for the project and a partner split was assigned.

**supplier groups** — Group of suppliers to which the sourcing manager can send RFQs.

**supplier instructions** — Text entered by the sourcing manager to provide suppliers with instructions necessary to complete RFQs.

**supplier line card** — Defines, by either manufacturer or commodity, which goods a supplier carries in the specified geographic location. The manufacturer line card is a detailed list that maps each manufacturer whose goods a supplier carries to a specific geographic location where those goods are available. The commodity line card is a detailed list that maps each commodity a supplier carries to a specific geographic location where those goods are available. The line card information determines how RFQs are disseminated to different suppliers.

**suspended** — Both individual users and supplier companies can be suspended from logging in to PCM.

## T

**Target Price field** — Currency field providing the target price that the sourcing manager defines for an item. Target price information can be imported or set within a project or RFQ. It is set at the item level, but the sourcing manager can specify a target price for individual response lines (item/manufacturer part/supplier combinations) from the RFQ.

**Terms of Sale field** — Supplier response field. Lets suppliers specify the terms of sale based on Standard Terms of Sale.

**Time of Action field** — Displays the time when an action being tracked on the History tab occurred.

**Total Extended Cost field** — Calculated field that sums the material and non-material totals, and then multiplies that by the quantity.

**transformation file** — An optional comma-delimited text file used by the Import Wizard to modify values in the source data before you import them to the target Agile system. The transformation file can be used to correct invalid or inconsistent data.

**Type field** — Displays the file type of an attachment.

## U

**unsuspend** — Changes the status of a company or user to Active after being suspended.

**UOM field** — UOM is the unit of measure. This field displays the UOM for quantity fields.

**User field** — Displayed on the History tab of an object such as a project or RFQ Response. Displays the name of the sourcing manager or supplier who performs an action.

## V

**Version field —** Displayed on the Attachments tab of an object, such as a project or RFQ. Displays the version of the attached file.

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