Product Governance & Compliance Supplier Guide

Release 9.2.1

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Revisions

Revision	Date	Pages Affected	Description
A	5/10/06	—	Release 9.2.1
B	6/5/06	4-4	Added task for completing IPC declarations
C	11/3/06		Release 9.2.1.3

CONTENTS

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 to Agile PG&C

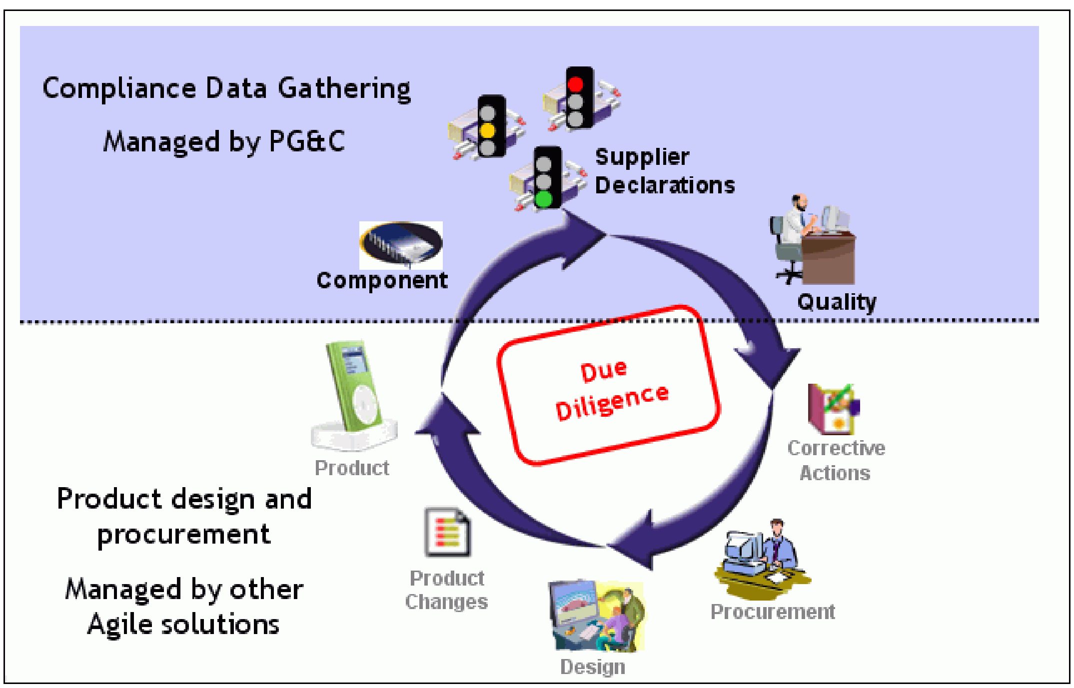
This chapter introduces Agile Product Governance & Compliance. It includes the following sections:

About Agile Product Governance & Compliance

Agile Product Governance & Compliance (PG&C) is designed to help manufacturers audit the presence and amount of regulated substances used in their products, and to demonstrate that they responsibly dispose of, recycle, or re-use parts containing those substances.

This figure depicts a standard cycle of procurement and manufacturing. Other Agile solutions – Product Cost Management, Program Execution, Product Collaboration, Product Quality Management – manage areas around the lower half of the circle. Product Governance and Compliance manages the compliance data-gathering area.

Figure 1-1: Closed-Loop Compliance–Corrective Action Process



Compliance Regulations

OEM manufacturers are required to take global responsibility to dispose of, recycle, or re-use electronics that contain hazardous substances. In addition to satisfying FDA regulations and ISO standards, any company that sells electronics equipment in an international market is subject to the OEM manufacturing regulations of their target markets.

How PG&C Gathers and Manages Compliance Data

Agile PG&C is a communication vehicle between the compliance manager and suppliers. People who manage the compliance process at the "buyer" site – compliance managers – must ensure that their company's products adhere to government regulations and company policy.

More specifically, compliance managers use PG&C to:

- Collect data about materials used to manufacture a product
- Analyze those data to determine compliance with re-use, recycling, and restriction targets
- Collect compliance information on the various regulations (part-level compliance information)
- Collect manufacturing process information on parts
- Generate reports to show the level of compliance
- Manage supporting documentation, such as descriptions of current regulations, recovery manifests, disposal certificates of destruction, supplier compliance surveys, and other customer-specific specifications.

Agile PLM Documentation for PG&C

The Preface of this manual provides the URL to Agile documentation for current releases of Agile PLM.

This manual, *Agile PG&C Supplier Guide*, provides information for you to learn to work in Agile Web Client and to complete your end of the compliance process.

A supplier in the PG&C solution is a company that provides compliance information about parts that are used in a buyer company's manufacturing process. The Agile administrator at the buyer company has created Agile users, including people at your company who will complete declaration requests from the buyer.

The chapters and main topics in this manual are:

- Chapter 2 – "Providing Compliance Information in the RFI Process": Requests For Information, PG&C Business Objects
- Chapter 3 – "Using Agile Web Client": Changing Your User Profile
- Chapter 4 – "Responding to Agile Compliance RFIs": Filling Out a Declaration, Importing and Exporting Declarations, Working with Microsoft Excel-based Client

Microsoft Excel-based Client

You may want to complete declaration requests entirely within the Agile environment, as described in this manual. It is also possible to complete declarations in other environments by exporting data from and importing data to Agile. Also, a Microsoft Excel-based Client is another means of simplified compliance fulfillment.

If your company has been configured to use this client, you will need to access it via Agile Web Client the first time.

> **Note** Some companies do not permit their employees to download ActiveX controls to their desktop computers. Therefore, the Microsoft Excel-based Client may have to be implemented by the IT department of your company via a "push approach": this automatically pushes the ActiveX control out to users' desktops. In any case, you may need to work with your IT department to integrate the Excel-based Client.

The Microsoft Excel-based Client functionality allows you to open companion spreadsheets in Microsoft Excel, connect to an Agile PLM system, download information, fill out required information, run local validations and calculations, and upload the information directly into Agile PG&C.

- **Use Case 1**: Using the JGPSSI spreadsheet template, upload information to Agile PG&C after validation.
- **Use Case 2**: Using the Agile Excel Integration Framework, you can create Excel-based integration for any of the declarations; contact your Agile representative.

Minimum Requirements for Microsoft Excel-based Client

Microsoft Excel-based clients for Agile PG&C require the following client-side software. These requirements have likely been satisfied by the time you are called on to fulfill Agile declarations.

Operating System

- Windows 2000 Pro SPX or Windows XP Pro SP2

Client Applications

- Microsoft Excel 2000, Microsoft Excel XP, or Microsoft Excel 2003
- Microsoft Internet Explorer 5.5 or 6.0

CHAPTER 2

Providing Compliance Information in the RFI Process

This chapter looks at the Request For Information process and the role of the information provider. It also describes the kinds of "declaration requests" that an information provider may receive from a buyer.

It includes the following sections:

- *Supplier Participation in Agile PG&C*
- *Requests For Information*
- *PG&C Business Objects*

Supplier Participation in Agile PG&C

As an information provider ("supplier") to a manufacturer ("buyer") who is seeking compliance information via Agile PG&C, this manual is your user handbook.

Your company may or may not actually manufacture specific parts that go into the products of an OEM; in any case, your company does provide compliance information about parts to this manufacturer.

At the supplier site, information providers use PG&C to complete and sign off on material declarations – the vehicle of RFIs:

- Declare compliance with specifications concerning hazardous materials that may originate from its customers and from government agencies
- Disclose which hazardous substances are contained in the components and subassemblies it provides.

Requests For Information

The process is called Request For Information (RFI). The declaration workflow is the vehicle for RFIs from your buyers. A declaration keeps track of the compliance information about substances and materials contained in parts or part families that are named in the declaration.

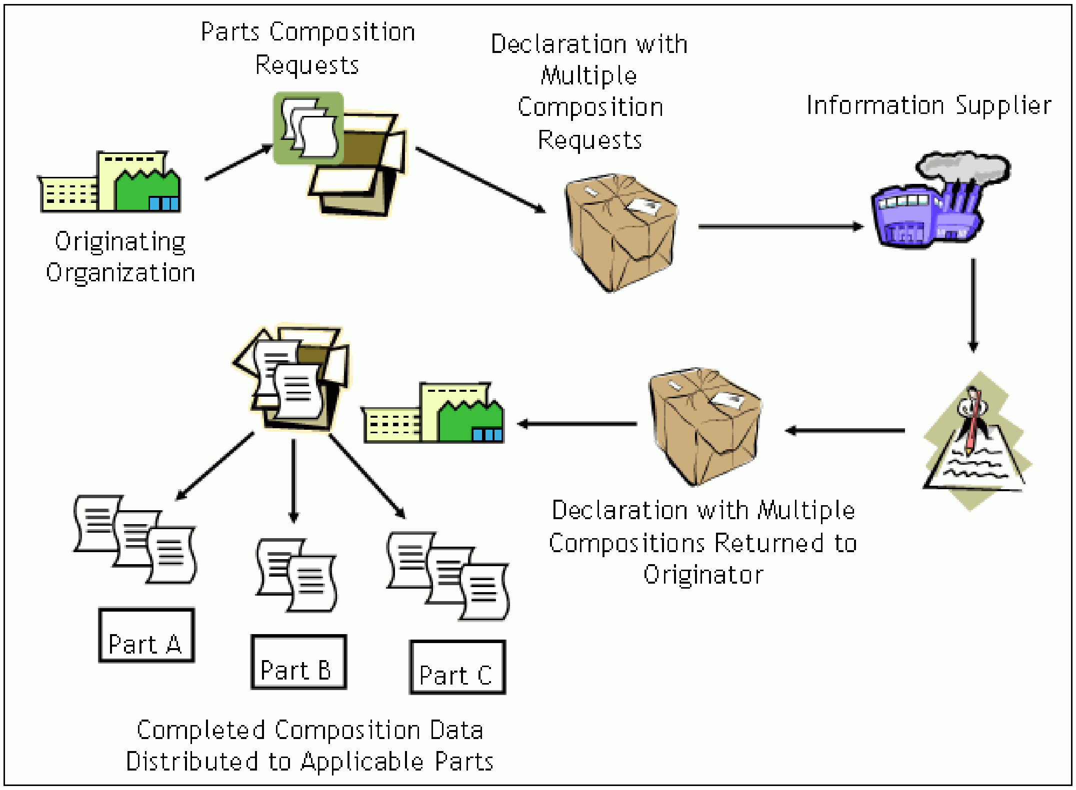
The general sequence of the RFI process is:

1. Identify parts and part families for which compliance data is required.
2. Identify people within the company (for parts) and suppliers (for manufacturer parts) who can provide compliance data.
3. Create declarations for parts, manufacturer parts, and part families.
4. Route a declaration to an information supplier.
5. Supplier completes the declaration with data and a signoff.

6 Compliance data is assessed for completeness and validated for correctness.

7 Reviewed and approved declarations are released, which "publishes" the data across the product record in Agile PLM.

The RFI process is depicted in the graphic below.



PG&C User Guide

The *Agile PG&C User Guide* is the manual for working in the Agile PG&C solution on the buyer side. It describes how to work with the PG&C-specific business classes in Agile PLM 9.2.1 and the compliance process. In some cases, it could be useful for a supplier user to refer to the *User Guide*.

Other PG&C Documentation

With information from the Preface, you may be able to access the Agile Documentation website. All manuals are periodically updated. *Getting Started with Agile PLM* is most useful as a source of basic information about working in Agile PLM, with end-user–oriented documentation about attachments, reports, searches, and workflows.

PG&C Business Objects

The PG&C solution offers configurable business objects called Substances, Specifications, Declarations, and Part Families. Items and Manufacturer Parts (from Agile Product Collaboration) are also integral to the solution.

Note It is possible that your buyer's Agile administrator has renamed existing classes and created new subclasses than those presented in this guide.

Here are brief definitions of the PG&C business objects.

- **Substances** — The Substances base class has four kinds of "substance objects":
  - **Substances** – a substance is a single chemical element; for example, lead, chromium, or cadmium.

- **Substance Groups** – a group of multiple substances. Substance groups have a base substance that is the substance the legislation is interested in.
- **Materials** – a compound chemical, that is, a substance consisting of multiple substances. An example of a material is a glue or a resin that can be bought in bulk.
- **Subparts** – a subpart is a subunit of a component. Subparts are not numbered and do not expand the BOM. Suppliers can create subparts as needed.

❑ **Specifications** — A specification states compliance criteria that a product is expected to meet or exceed. A specification can be an internal document issued by the buyer's company, a supplier's own internal specification, or a regulation issued by a government body, such as the European RoHS directive.

❑ **Items and Manufacturer Parts** — Items – Parts and Documents – and Manufacturer Parts are the things that are assembled into products, about which compliance data must be sought from the information supplier.

Important In this manual, the word "part" is used to mean all objects from the Parts, Documents, and Manufacturer Parts classes. So, the phrase "parts and part families" can be thought of as inclusive of "any kind of part used in my company's manufacturing process."

❑ **Part Families** — Part Family is a subclass from the Part Groups class. A part family is a "container" that tracks the overall chemical composition for all parts of a particular type. If multiple parts share the same properties – for example, the same composition – a part family can be defined with those characteristics.

❑ **Declarations** — A declaration is a record of questions posed by a compliance manager to an information supplier about the supplier itself, its products, or how its products comply with given specifications. Each declaration is addressed to only one supplier. Upon completion, it contains the supplier's responses to the questions. The buyer reviews the supplied information and publishes it to the product record.

Agile PLM 9.2.1 provides seven kinds of declarations:

- **Substance Declarations** – The supplier is requested to provide compliance information for each substance within the specification. Substances in the attached specification are automatically pre-populated to all the parts before the declaration is sent to the information supplier.
- **Parts Declarations** – Receive part level compliance information as well as other composition header level information (manufacturing parameters).
- **Homogeneous Material Declarations** – The supplier is requested to provide a complete BOS breakdown of the part and provide compliance information at the homogeneous material level.
- **JGPSSI Declarations** – The supplier is requested to provide compliance information according to the JGP standard. Agile supports only JGPSSI version 2.02.
- **Supplier Declarations of Conformance** – A questionnaire to assess supplier compliance with specifications from customers and government agencies. The survey addresses compliance at a general company level. Can be used for CSR type declarations.

From five classes in Rel. 9.2, two classes were added to the PG&C Declarations base class to support compliance work using the IPC forms for substance declarations (IPC 1752-1) and homogeneous materials declarations (IPC 1752-2). These forms are in Adobe PDF format. Adobe Reader 7.0.5 is the minimal requirement; Adobe Reader 7.0.7 is recommended. The website for Adobe Software is www.adobe.com.

- **IPC 1752-1 Declarations** – A Joint Industry Guide (JIG) substance composition declaration for electronic products.
- **IPC 1752-2 Declarations** – A homogeneous material composition declaration for electronic products.

  Release 9.2.1 only supports draft "Version 10" of the IPC format, not released Version 1.0. The website for the IPC forms and information about the "1752" standards is www.ipc.org/IPC-175x. No fields are pre-populated in this declaration.

Chapter 3

Using Agile Web Client

This chapter describes how to get started with Agile Web Client and how to perform essential tasks. Topics include:

- *Introducing Agile Web Client*
- *Changing Your User Profile*

Introducing Agile Web Client

Agile Web Client is opened using only a browser. Web Client is the only client that supports Agile's Product Governance & Compliance solution (PG&C). As a supplier, you are generally assigned to "Basic mode," and your user interface with Web Client has been streamlined for responding to PG&C declaration requests.

If your work becomes more involved and the buyer firm assigns you one of the "Advanced modes," you will see the full user interface of Web Client; in that case you will need to refer to the manual *Getting Started with Agile PLM*, perhaps along with other user guides.

Logging In to Web Client

Your buyer company's compliance manager has issued you a starting URL, along with username (User ID) and password. If a URL is specified in the documentation or release notes, copy the upper- and lower-case characters exactly, including the full domain name specified.

To start Web Client:

1. Start your browser.
2. Click the Web Client bookmark, if one exists, or type a URL that follows this pattern:

   ```
   http://<webserver>.<domainname>.com/Agile/PLMServlet
   ```

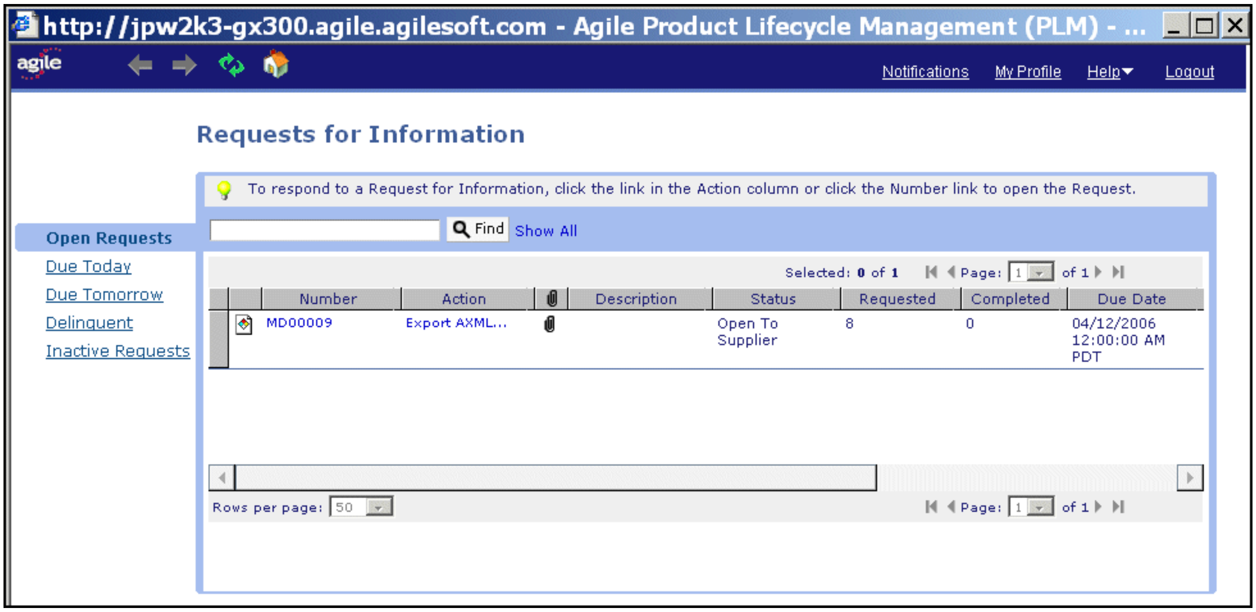
   The Login page appears.
3. Enter your username. Your username is not case-sensitive.

   Your *username* is assigned by your Agile compliance manager; it is likely an abbreviation of your full name. For example, the name Michael Jones may be abbreviated to MICHAELJ or MJONES.
4. Enter your password. Your password ***is*** case-sensitive.
5. Click the **Login** button. If you make a mistake, click **Clear** and retype your username and password.

The login process is complete, and the Requests for Information page appears. In the page's title bar you will see "**Welcome**, <***Your Name***>" (see graphic next page).

The page is on the **Open Requests** link, so the table will list any Agile "declaration requests" that have been sent to you. The other links are described in "Left Pane Links" on page 3-3.

Figure 3-1: Agile Web Client (Basic mode) for PG&C supplier



Main Toolbar

You can use the toolbar buttons on the main toolbar to perform the tasks described in the following table.

Table 3-1: Web Client main toolbar buttons

Button	Name	Description
	**Back**	Takes you to the previous page you viewed in your browser. (It does not, however, undo any changes you entered in Agile.)
	**Forward**	Takes you to the next page forward. It is disabled if you have not gone forward from the page currently in your browser.
	**Refresh**	You can refresh (update) the information on the visible page.
	**Home**	Brings you back to the basic RFI page.
	Notifications	Clicking the link displays a list of your received notifications, alerting you to events in the RFI process.
	My Profile	Clicking the link displays the information that defines your "user object," which governs your access to Agile declarations. You can click **Edit** and change any of the editable fields. Click **Save** to save these changes or click **Cancel** to end the operation without changing your profile. For more information about changing the fields and definitions of the user properties, see "Changing Your User Profile" on page 3-4.
	Help	The **Help > About Agile** command displays version information.
	LogOut	Lets you exit Web Client.
Find	**Find** (Run Simple Search)	Searches for declarations that match your typed input. For example, if you are in **Open Requests** and there are many, you can search and find the one you are looking for.

Logging Out of Web Client

To log out of Web Client:

1 From the menu bar, click the **Logout** button.

2 You are returned to the Login page. To exit, close the browser from the upper-right corner.

Printing Declarations

From the Basic Supplier Interface, the system will print the following tabs of a declaration: **Cover Page**; **PageTwo**; **PageThree**; **Parts/Part Groups** tabs as well as the corresponding **Substances** tables; and **Specifications**.

Left Pane Links

The left pane on the main RFI page has links as follows:

- **Open Requests** – this is the default link so you generally see a list of all your open declaration requests. If you have clicked another link, Open Requests appears as a live link.
- **Due Today** – lists all open declarations whose due date is set for the current calendar day.
- **Due Tomorrow** – lists all open declarations whose due date is set for the next calendar day.
- **Delinquent** – lists all open declarations whose due date is set for the previous calendar day or earlier.
- **Inactive Requests** – lists all declarations that were submitted to you but that have been closed by your buyer.

Open Declaration Links

When you have opened a declaration request, the left pane changes its links to the following:

- **Edit** – Click this link to activate editable fields. Change or add values in any of those fields. Click **Save** to preserve your changes, or clicke **Cancel** to end the operation with no changes saved.
- **Add Attachments** or **View Attachments** – Click this link to add attachments to the declaration (for example, you may want to return a spreadsheet file to the buyer). If the declaration already has attachments, the link says **View Attachments**, but you can still add attachments by clicking and following the user interface.
- **Submit Declaration** – When you have completed providing the requested data on the declaration–and signed off–clicking this link will send it back to the compliance manager at the buyer firm.
- **Print** – You may wish to have or distribute a hardcopy of the declaration at the start or when it is completed. Click this link to bring up a Print dialog.
- **Email Comments** – You may have a question for the compliance manager or other information that you want to quickly distribute. When you click this link, there are two elements to complete. In the **Comments** field, simply type your message or question. Click the **Send To** button to start a wizard to find names.
- When you are ready, click **Send** to send the comments. Click **Cancel** to end the operation with no email sent.

Using the Process Extensions

Note that following the actions listed above, other applicable process extensions are displayed. This topic is covered in “Importing and Exporting Declarations” on page 4-2.

Changing Your User Profile

Your User Profile is simply the collection of settings that were entered by the Agile administrator when your "user object" was created. Clicking the link in the main toolbar displays the information contained in your profile, some of which is simply information (like phone number) and some of which governs your access to Agile declarations (like Role).

Your user profile is available for you to modify, within constraints set by the administrator. It contains data under two tabs, **General Info** or **Preferences**.

Important Under **Preferences**, the Response Edit Mode property is set to **Basic** and should be left on that setting.

If you select one of the other two settings, **Advanced Table Edit** or **Advanced Wizard Edit**, when you click **Save**, you will be prompted to log out and log back in; you would then log in to Web Client (Advanced mode), where your capabilities are restricted.

If you do log in to Web Client (Advanced mode), you will have to click the **My User Profile** link and go to Response Edit Mode property to change it back to **Basic**, followed by logging out and logging back in to Web Client (Basic mode).

If you work frequently with buyer companies and are often required to create declarations, you can be assigned additional roles and privileges to enable you to work effectively in Web Client (Advanced mode).

You have an opportunity to enter information when you first log in to Web Client. Again, your Agile administrator determines to what extent you can edit your user profile.

To edit or add information to your user profile:

1. Open your user profile by clicking **My Profile**.
2. Click the tab on which you want to make changes. For instance, to make changes to the **General Info** tab, click that tab.
3. Click the **Edit** button on that page. Use lists, browse buttons, and text boxes to enter the requested information.
4. When you have finished, click **Save**. If you wish to cancel your changes, click **Cancel**. Clicking the other tab (**General Info** or **Preferences**) will also cancel the current Edit operation without saving changes.
5. To verify changes you make to your user profile, it is best to log out of Web Client and log back in.

   Note If you will be working primarily in Web Client, check this setting in your user profile: **Preferences > System Preferences > Preferred Client**; it should be set to Web Client. Also, **Receive Email Notifications** should be sent to Yes. This will ensure that you will receive email notifications in the same client you are working in. If there is a discrepancy and you are not able to change these properties, see your Agile administrator.

User Properties Defined

Table 3-2 lists and describes the properties common to supplier users in the Agile PLM system.

Table 3-2: User properties

Property	Description (default is underlined)
General Info tab	
User ID (username)	The user's Agile PLM login user identification, or username. It must be unique in the Agile PLM address book. The maximum is 128 characters.
First Name and **Last Name**	The user's public name. Neither of the user's Names fields has to be unique in the system, only the user's **User ID** must be unique.
Status	Indicates whether the user is enabled (Active) or disabled (Inactive). Not editable.
Email	The user's valid email address for change notification/routing. **Note:** If there is not a valid email address in the **Email** field, the user will not receive any email notifications.

Table 3-2: User properties (continued)

Property	Description (default is underlined)
Title	The user's title, for example, Senior Engineer.
Address fields	There are four address fields that are used for informational purposes only: **Address** (street), **City**, and **Postal/Zip Code**.
Phone number fields	The user's **Business Phone** and **Mobile Phone** numbers (for informational purposes only).
Fax	The user's fax number (for informational purposes only).
Pager	The user's pager number (for informational purposes only).
Secondary Email	The user's valid email address for change notification/routing. The **Secondary Email** is optional, but when the field is filled in, the user receives notifications at both email addresses.

Table 3-3: User properties

Property	Description (default is underlined)
General Info tab, continued	
Role(s)	The user's role assignments. This property determines a user's access to the objects in Agile PLM from the point of discovery forward.
User Category	Power, Concurrent, or Restricted: you as a supplier are a Restricted user.
Use Login Password for Approval	Each user has a login password and approval password (used to approve changes).
Allow Escalation Designation Approval	This setting is editable. If the user has identified one or more designated escalation persons (DEPs), this setting determines when the DEPs can approve or reject a declaration. *Settings*: After Escalation – The user's DEP can approve a routable object only after it has been escalated. Always – The user's DEP can always approve or reject a routable object.
Sites	**Sites** are used for distributed manufacturing, but as sites are not supported by PG&C, this is unlikely to have options.
Authorized Ship-To	**Authorized Ship-To** is used only by PCM.
Preferences tab	
Preferred File Manager	Select from the list of file servers. For best performance, select a file server that is local server for you.
Receive Email Notification	Controls whether the user can receive automatically generated email notifications from the system. *Settings* = Yes or No
Language	English is available with all Agile PLM licenses. Agile PLM includes Japanese or Simplified Chinese, per your license. Other languages will be made available in the future.
Preferred Date Format	The format in which dates are displayed to the user. Default is MM/dd/yyyy.
Time Zone	The time zone where the user is located.
Preferred Time Format	The format in which times are displayed to the user. The default is hh:mm:ss aaa (aaa = AM or PM).
Preferred Currency	The currency in which prices/costs are displayed to the user. The default is U.S. Dollar.
Number Format	The format in which numbers are displayed to the user.
Preferred Inbox View	Select between Activities, Notifications, and Workflow.
Response Edit Mode	This field should be left set to Basic. The other two settings, Advanced Table Edit and Advanced Wizard Edit, will take you into the main Web Client, where your capabilities are restricted.
Rows per Table Display	The number of rows that appear in the user's Agile Web Client user interface. The default is 50.
Static Table Headers	Set to Yes to carry table headers to additional pages.
Encode Type	The types are Western European (ISO), Japanese (Shift JIS), Traditional Chinese (Big 5), Japanese (EUC), Simplified Chinese (GB2312), and Unicode (UTF-8).

CHAPTER 4
Responding to Agile Compliance RFIs

This chapter describes how to respond to Agile declaration requests. This chapter includes the following sections:

Filling Out a Declaration

A Request For Information (RFI) is the process that a manufacturing company (the buyer) uses to seek compliance data from its suppliers. The buyer uses Agile PG&C to create declarations. When the buyer firm creates a declaration, it specifies a unique declaration name and a single supplier company.

To complete and sign off declarations, contact users for the supplier company have been assigned a role that permits access to the declarations. The default recipient at the supplier company receives an email of notification. All users at the supplier company who have been assigned the appropriate role can respond to the declaration. If you have questions about who in your company has been assigned this role, contact your buyer company.

When you are sent a declaration request, you are responsible for completing it. You must disclose whether or not any restricted substances are contained in the component or subassembly it lists, and whether those substances comply with the given specifications.

Process Sequences in Declaration Fulfillment

The following process sequences describe a range of responses to declarations.

Declaration Opened and Completed in Agile Web Client

1. Supplier firm's default recipient receives email notification from buyer firm's Compliance Manager requesting completion of a compliance declaration.
2. Click link within notification and log into Agile Web Client (Basic mode).
3. Clicks **Open Requests** link and select the particular declaration request.
4. Fill in your responses directly in Web Client. Currently this is possible only for Supplier Declarations of Conformance.
5. Complete the Sign Off Message.
6. Submit response back to the Compliance Manager.

Declaration Opened in Web Client and Completed in Microsoft Excel-based Client

1. Supplier firm's default recipient receives email notification from buyer's Compliance Manager to complete a compliance declaration.
2. Click link within notification and log into Agile Web Client (Basic mode).
3. Use the **Open in Excel** process extension. The declaration opens in (pre-installed) Microsoft Excel-based Client, and the file is immediately saved to your hard drive in a folder called **Material Declaration Requirements**.
4. Within Microsoft Excel, enter your responses into the form, and save it.
5. On the **Agile** menu in the Excel client, choose **Submit Response**.
6. Complete the Sign Off Message and click **OK**.

Declaration Opened and Completed in Microsoft Excel-based Client

1. On the **Agile** menu in the Microsoft Excel-based Client, select from list of open declarations. The spreadsheet is populated with data from new declaration.
2. Within Microsoft Excel, enter your responses into the form, and save it.
3. On the **Agile** menu in the Excel client, choose **Submit Response**.
4. Complete the Sign Off Message and click **OK**.

Declaration Opened in Web Client and Completed Using Process Extensions

1. Supplier firm's default recipient receives email notification from buyer's Compliance Manager to complete a compliance declaration.
2. Click link within notification and log into Agile PLM via Web Client (Basic mode).
3. Use the **Export JGPSSI** or **Export AXML** or **Export IPC XML** process extension. The declaration request data is exported in the appropriate format, and you can open the file.
4. Enter your responses into the file, and save it.
5. Use **Import JGPSSI** or **Import AXML** or **Import IPC XML** to import the completed declaration data into Agile PLM.

Note When adding substances to declaration's <part/PG> **Substances** table (using Excel integration or process extensions), only substances and substance group objects need to exist in the Agile system as global objects. You, the supplier, are free to enter any name for material and subparts in the **Substances** table.

Importing and Exporting Declarations

"Process extension" is the formal name of items in the **Actions** menu in declarations (in standard Web Client) or links in the **Actions** column of declaration rows (in simplified Web Client). Links in the **Actions** column enable you to perform an operation directly without having to go open the declaration itself.

Note Any kind of declaration can use "**Open in Excel**" as long as an Excel template for that declaration class has been created. Consult with your buyer firm and the Agile Solutions Delivery representative. Also see "Working with Microsoft Excel-based Client" on page 4-4.

These are the current process extensions that may be available on declarations. The Agile administrator at the buyer firm may have elected not to use more than the basic **Actions** found on most Agile objects.

The following process extensions apply to JGPSSI declarations:

- **Open In Excel** – This process extension activates the Microsoft Excel-based Client and opens the JGPSSI template in Excel

- **Import JGPSSI** – This process extension imports data from a text file in JGP Block format for integration with the JGPSSI Excel template
- **Export JGPSSI** – This process extension exports data to a text file in JGP Block format for integration with the JGPSSI Excel template

The following process extensions apply to Homogeneous Materials Declarations, Part Declarations, and Substance Declarations:

- **Import AXML** – "AXML" is Agile XML, an XML representation of Agile's business schema that contains all product content managed in Agile. You use this process extension to export the declaration information in aXML format. The declaration can be completed and re-imported into PLM.
- **Export AXML** – A declaration that was exported using the aXML format and then completed can be imported back into PLM using this process extension

The following process extensions apply to IPC declarations:

- **Import IPC XML** – Imports XML data that is used to complete IPC forms
- **Export IPC XML** – Exports XML data that is used to complete IPC forms

Note It is possible that when you submit data to Agile from Microsoft Excel-based Client, the data may not be successfully imported at the buyer side. Yet you may have received a notification indicating that transmission of the data was successful. The notification is triggered by your submitting the data, not by its successful receipt: the compliance manager may ask you to re-submit the data in these cases.

Exporting PG&C Data

Grouping the possible "export" process extensions:

- JGPSSI declarations use **Open in Excel** to open the contents of the declaration's **Parts** tab in the JGPSSI format
- **Export JGPSSI** exports the declaration in JGP Blocks format
- **Export AXML** exports the declaration in aXML format; this can be used with Part Declarations, Substance Declarations, and Homogeneous Material Declarations
- **Export IPC XML** exports the declaration in XML format that is used to complete IPC forms.

Importing PG&C Data

Grouping the possible "import" process extensions:

- **Import JGPSSI** imports a JGP Blocks file (if it was exported via **Export JGPSSI**) back into the declaration
- **Import AXML** imports an aXML file (if it was exported via **Export AXML**) back into the declaration
- **Import IPC XML** imports an XML file (if it was exported via **Export IPC XML**) back into the declaration.

Note You cannot perform a **JGPSSI Import** on a JGP file that was not already modified via the JGPSSI Excel template. The transformation from JGP to Agile XML fails when there is no extra data in the file.

Importing and Exporting IPC Declarations

This task outlines how you might receive an IPC declaration that was created in Agile at the buyer site. You would complete the declaration working in the IPC PDF.

A typical RFI sequence with an IPC declaration:

1 The compliance manager at the buyer site creates an IPC declaration in Agile PLM; this is an instance from one of Agile's IPC business classes, IPC 1752-1 Declarations or IPC 1752-2 Declarations. The default workflow for the declaration is moved to the **Open to Supplier** status.

2 You, the contact user at the information supplier, log in to Web Client (Basic mode) and see the declaration name. A link in the declaration row activates the **Export IPC XML** process extension. (Or, if you click the declaration name, all available process extensions are displayed as links on the left navigation pane.) An XML file is saved on your machine.

3 If you have already downloaded the IPC PDF forms from the IPC web site (www.ipc.org/IPC-175x), open the IPC form in Adobe Acrobat and click **Import Data** (or **File > Form Data > Import Data to Form**), then specify the location of the XML file. The XML-contained data is imported to the PDF form.

4 Enter or modify values in the declaration.

5 When you have completed the form, the data is exported using **Export Data** (or **File > Form Data > Export Data from Form**). The existing XML file is overwritten.

6 Returning to Web Client, use **Import IPC XML** process extension to import the modified XML data. Then submit the declaration to the buyer firm.

7 At the buyer site, the compliance manager opens the completed declaration in Agile to review for possible release.

Working with Microsoft Excel-based Client

The Microsoft Excel-based Client should be installed, configured, and tested by the buyer company. If you have problems with the Excel integration in PG&C, contact the compliance manager at the buyer company.

When you first access a declaration via the Microsoft Excel-based Client, a folder is automatically created on your desktop to store declarations. The folder may be called **Material Declaration Requirements**. Although you must access the Client via Agile Web Client the first time, you can subsequently open Microsoft Excel and access declarations directly.

You may receive a test (JGPSSI) declaration from your buyer company, and you can use the following task to test whether the Microsoft Excel-based Client for JGPSSI Declarations is working properly.

To test JGPSSI Declarations in Microsoft Excel:

1 Log in to Agile Web Client.

2 Click the link to the JGPSSI Declaration to open it.

3 Click **Open In Excel**; it is in the Actions column.

4 Microsoft Excel is launched and the file is opened. You are prompted to save the file to a folder on your desktop.

5 Fill in a one or more fields on the sheet. For example, change the value of the Parts Mass field.

6 Save the Microsoft Excel file.

7 On the **Agile** menu in the Excel client, choose **Submit Response**. The Submit Response window appears. You are prompted to log in when attempting to submit response from Agile menu in Excel.

8 Type your approval password, and click **Submit**.

9 Wait while your response is uploaded. After a minute, a message box should appear: "Your response was successfully submitted for processing." Click **OK**.

Note When you open a JGPSSI declaration in Microsoft Excel and try to edit one of the cells, you may see the following error message: "The cell or chart you are trying to change is protected and therefore read-only. To modify a protected cell or chart, first remove protection using the Unprotect Sheet command (Tools menu, Protection submenu). You may be prompted for a password." However, the colored cells of the JGPSSI template (such as headings) are protected and cannot be edited. You should edit only unshaded (white) cells.

Note After submit from Excel Integration, it can seem that supplier data has been submitted and declaration has moved to next status, whereas the server takes awhile to process the data.

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