ORACLE®

Agile Product Lifecycle Management

Product Cost Management Supplier Guide

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Preface

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

Audience

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

Documentation Accessibility

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

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

Oracle's Agile PLM documentation set includes Adobe® Acrobat PDF files. The Oracle Technology Network (OTN) Web site http://www.oracle.com/technetwork/documentation/agile-085940.html contains the latest versions of the Agile PLM PDF files. You can view or download these manuals from the Web site, or you can ask your Agile administrator if there is an Agile PLM Documentation folder available on your network from which you can access the Agile PLM documentation (PDF) files.

Conventions

The following text conventions are used in this document:

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

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

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Introduction

Traditional methods for managing and analyzing total product costs throughout the product life cycle 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 life cycle.

Overview

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

What is Product Cost Management?

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

Product Sourcing manages the preparation and dissemination of Requests for Quotes to suppliers and enables 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 enables you to participate in workflow processes, and proactively initiate a change to contract pricing.

Introducing Agile Objects

In Oracle Agile PLM, 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 many 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.

For more information, see the *Getting Started with Agile PLM User Guide*.

Sourcing Process

Supplier users do the following:

- Receive email notifications about a Request for Quote (RFQ) from a buyer
- Accept buyer's terms & conditions before reviewing an RFQ (if Terms and Conditions have been enabled and set as required)
- View data, which may include BOMs, AMLs, and attachments, in an RFQ
- Provide prices directly into the web application or export data, complete responses and import back into Agile PCM
- Propose alternate parts
- Analyze historical quoting information
- Submit the RFQ back to the buyer
- 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 own user profile and set preferences, for example, preferred currency, preferred time zone, and so on
- Update your line card offerings
- Create your own supplier users
- Assign alternate users
- View Costed Bill of Materials

> **Note:** Some actions listed above may be restricted by a user's privileges. If you need additional privileges, talk to the Supplier Manager or the Agile administrator.

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 many 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.

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:** If you have the appropriate privileges for an object type (for example, RFQ Response objects), all attachment tasks (including check in, check out, and add) can be performed from the **Attachments** tab of that object.

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

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

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

The Add button above the table enables you to add attachments by several methods. **Add > Files** attaches one or more files and creates a file folder object containing those files. **Add > URLs** attaches URLs and creates a file folder object for each URL. **Add > By Search** enables you to search existing file folders for the files or URLs you want to attach. For more details about adding attachments, see *Getting Started with Agile PLM.*

Searching for Objects

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

- **Quick searches** find objects of all types (or only one object type, if one is specified) 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."

- **Custom searches** extend the Advanced Object search to include multiple conditions.

- **Where-used searches** find the assemblies in which the BOM contains the items that match the search criteria.

- **Relationship searches** find objects related to the objects that meet the search criteria. For example, you can search for the problem reports that appear on the Relationships tab of changes that meet search criteria.

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

Personalizing PCM Object Tabs

On some tabs of PCM objects, you can select which fields to view (and how to view them) to obtain better performance and to meet your specific needs. When you open these tabs for the first time after logging in, the default view appears automatically. After that, you can reconfigure the tab display by clicking the **Personalize** button, which brings up the *Table Personalization* palette.

> **Note:** Although the Personalize button is available for other PCM objects, this section focuses on RFQ Responses since it is the object that suppliers most frequently use.

From the *Table Personalization* palette, you may be able to:

- *Sort* table results by up to three attributes

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

discussion Subject in ascending or descending order. Sorting is not available on some tabs, including the Responses tab.

- *Filter* the information based on specified criteria

  For example, on the *Responses* tab, you may want to view only the response line items that need to be requoted. To do this, you can set your filter criteria to be "Response Line Status Equal To Requote". For details on how to filter table rows, see "Filtering Objects" on page 1-6.

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

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

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

You can configure the display of the following RFQ Response tabs:

- Responses
- Discussions
- Relationships
- Attachments
- History

The following table shows the personalization features that are available for each RFQ Response tab.

Tab Name	Sort	Filter	Format	Properties
Responses	X	X	X	This cell is blank
Changes	This cell is blank	This cell is blank	This cell is blank	This cell is blank
Discussions	x	X	X	X
Relationships	X	X	X	X
Attachments	X	X	X	X
History	X	X	X	This cell is blank

> **Note:** On the Sort, Filter, and Format tabs of the *Table Personalization* palette, you can choose to save your preferences as a new view using the Save button. View properties are displayed on the Properties tab.

Configuring the display of a tab

To configure the display of a tab

1. Open an RFQ Response and select one of the configurable tabs, for example, the Discussions tab. Click **Personalize**.

- **To sort fields:** On the *Sort* tab, you can select up to three fields by which the table rows should be sorted. For each field, choose whether the sort should be done in ascending or descending order.

- **To filter data:** See "Filtering Objects" on page 1-6.

- **To format fields:** On the *Format* tab, select the fields that you want to view on the tab from the **Hidden Fields** list. Click the right arrow button to move fields into the Displayed Fields list. Use the up/down arrows to change the order of appearance of the columns.

- **To lock columns:** To lock a field in the Displayed Fields list, select it and click the lock icon.

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

2. Click Apply to apply the new display.

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

> **Note:** The attributes available for the RFQ Response tabs vary based on how your Agile PLM system has been configured.

Filtering Objects

The filter tool enables you to filter the rows of a table that is on an object tab, such as the table on the *Responses* tab of an RFQ Response object.

The **Personalize** button appears on most tabs and enables you to sort and format table content, and filter table content. Use the filter tab on the **Table Personalization** palette to display only the table rows you are interested in.

To filter data on a tab:

1. Open the RFQ Response and click the desired tab.

2. Click **Personalize**. The *Table Personalization* palette appears.

3. Click the **Filter** tab.

4. Click the *Field* dropdown list to select a field by which to filter.

5. Click the *Operator* dropdown list to select a relational operator for the filter. The list of relational operators depends on the type of attribute selected.

6. Select a value for the filter criteria.

   - For text attributes, type a value.

■ For list attributes, click the list icon to select a single or multiple values from available values list.

7. To add additional filters, click the plus icon.

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

8. Click **Apply**.

> **Note:** If you want to save this filter for future use, click Save.

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

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*.

What's New in PCM

The following are new features listed by the release in which they were introduced.

New Features in PCM 9.3.5

There are no new features or enhancements in this release.

New Features in PCM 9.3.4

There are no new features or enhancements in this release.

New Features in PCM 9.3.3

There are no new features or enhancements in this release.

New Features in PCM 9.3.2

New features that affect suppliers in the Agile PCM Release 9.3.2 include the following:

■ The addition of the Acknowledger reviewer role in the workflows of PCOs.

■ The addition of a Functional Team(s) attribute to Prices, PCOs, and Part Groups.

For more details on these workflow changes, See *Getting Started with Agile PLM.*

New Features in PCM 9.3.1

New features that affect suppliers in the Agile PCM Release 9.3.1 include the following:

- Multi-column filtering is available on the RFQ Response-Responses tab.

- All dates related to prices are now in DateOnly format in GMT. Project periods, RFQ due dates, price line effective from/to dates, valid from, and valid until dates are now all in DateOnly format.

- A new configurable attribute is available on the RFQ Response Entry form to allow you to explicitly set a start date for prices that have quantity breaks. The new attribute, Valid From, has a default of the current date.

New Features in PCM 9.3

There are several new UI enhancements in Agile PLM that help make your PCM experience more efficient and beneficial. An overview of PCM-specific enhancements is provided in the following sections.

UI Enhancements

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

- When filling in list and multi-list fields, you can type ahead values if you already know the value you want to enter. If you do not know what value to enter or if whatever value you entered is displayed in red font, you can search for the value by clicking the search button.

- When filling in date fields, you can either type in the date manually or click the calendar button to select a date.

- The Prices and PCO objects support full view personalization.

- The RFQ Response and Supplier objects support limited view personalization.

> **Note:** For more information about view personalization in PCM, see "Personalizing PCM Object Tabs" on page 1-4.

UI Enhancements in RFQ Responses

The following are enhancements that affect the RFQ Response object:

- Some action buttons, and their menu options, have been rearranged, or renamed, or both on the Responses tab.

- Filtering is supported in the Responses tab through view personalization. Multi-column filtering is not supported.

- When using Advanced Table Edit mode, inline table editing is supported for editable fields.

- The wizard flow diagram in the left pane is no longer displayed. Instead, when using Basic edit mode, the diagram is replaced with a text version of the flow steps. The flow is not displayed while in other response edit modes.

UI Enhancements in Prices and Price Change Orders

The following are enhancements that affect the PCO object:

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

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Managing Your User Profile

This chapter provides information about managing your user profile.

Managing Your User Settings

You can access Web Client user settings by clicking the My Settings button (in Advanced Table Edit or Advanced Wizard Edit response edit modes) or the **My Profile** button (in Basic response edit mode).

This chapter includes the following topics:

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

> **Note:** Supplier Managers can see and modify additional information on the Administrator page. For details, see "Managing Supplier Details" on page 3-1.

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 on-screen 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. Click the My Settings icon or My Profile to open your user profile.

> **Note:** The My Settings icon does not appear in all response edit modes. In Advanced Table Edit and Advanced Wizard Edit response edit modes, the My Settings icon appears in the Courtesy Controls area. In Basic response edit mode, the **My Profile** button appears instead in the toolbar at the top of the right pane.

2. Click the tab on which you want to make changes.

3. To make changes to the **General Info** and **Preferences** tabs, click **Edit** and use the lists, browse buttons, and text boxes to enter the requested information.

4. In the **Escalations** tab, you can add new notifications, by clicking **Add**, or remove existing notifications by selecting the row(s) and clicking **Remove**. To make changes, click directly in the field you want to edit and make changes, as needed.

Changing Your Password

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

To change your login password:

1. Click the My Settings icon or **My Profile** to open your user profile.

> **Note:** The My Settings icon does not appear in every response edit mode. In Advanced Table Edit and Advanced Wizard Edit response edit modes, the My Settings icon appears in the Courtesy Controls area. In Basic response edit mode, the **My Profile** button appears in the toolbar at the top of the right pane.

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2. Click **Change Passwords**. The *Change Passwords* dialog appears.

3. Type your old login password in the **Login Password** field.

4. Type your new login password in the **New Login Password** and **Confirm Login Password** fields. (Passwords are case-sensitive.)

5. Fill in the **Approval Password** fields.

> **Note:** If the Use Login Password for Approval field in your profile is set to Yes, then you see only the Login Password fields.

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6. Click **Save**.

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

Viewing Sign-off Authority Transfers

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

To view transfers that have been set up for you, click the My Settings icon or the My Profile button, as appropriate, to open your user profile and then click the **Transfer Authority** button.

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

RFQ Response Edit Mode

You can enter RFQ line item responses using one of the following three edit modes:

- Basic

- Advanced Wizard Edit

- Advanced Table Edit

You can select the response entry mode you want to use from within 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.

> **Note:** In all three response edit modes, you can choose to export response lines, complete them and then import them back into the RFQ Response.

To switch between entry modes:

1. Click the My Settings icon or **My Profile**, depending on your Response Edit Mode preference, to open your user profile.

2. Go to the **Preferences** tab, and click Edit.

3. From the **Response Edit Mode** dropdown list under **Display Preferences**, select the method you want to use.

4. Click **Save**.

For more details about the various methods for entering response information, see "Entering and Modifying RFQ Response Information" on page 4-9.

Overview of Basic Edit Mode

If you choose to use the Basic edit mode, when you log in to PCM, you see the Welcome page. In the left pane, there are quick links that you can use to filter requests. For example, you could click the **Due Today** link to view requests that are due today.

Figure 2–1   Basic Edit Mode
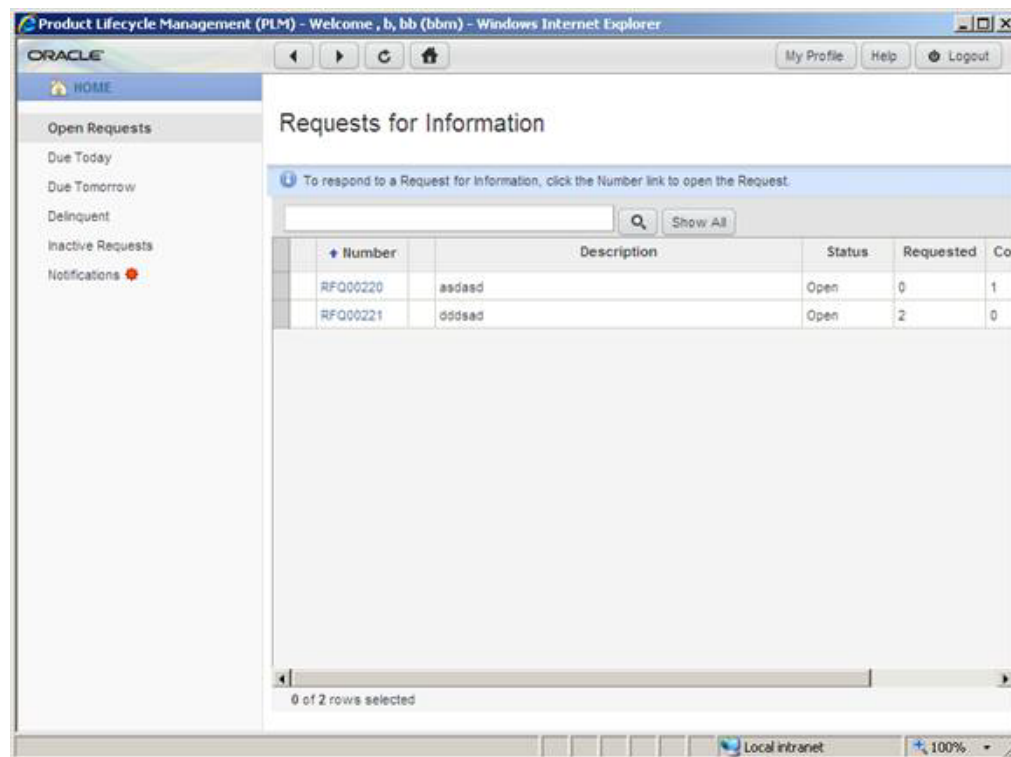
When you open an RFQ, you only see the Cover Page without any tabs. Instead of tabs, there are links in the left pane that allow you to step through the process of viewing, completing, and submitting responses.

Figure 2–2   RFQ Cover Page in Basic Edit Mode
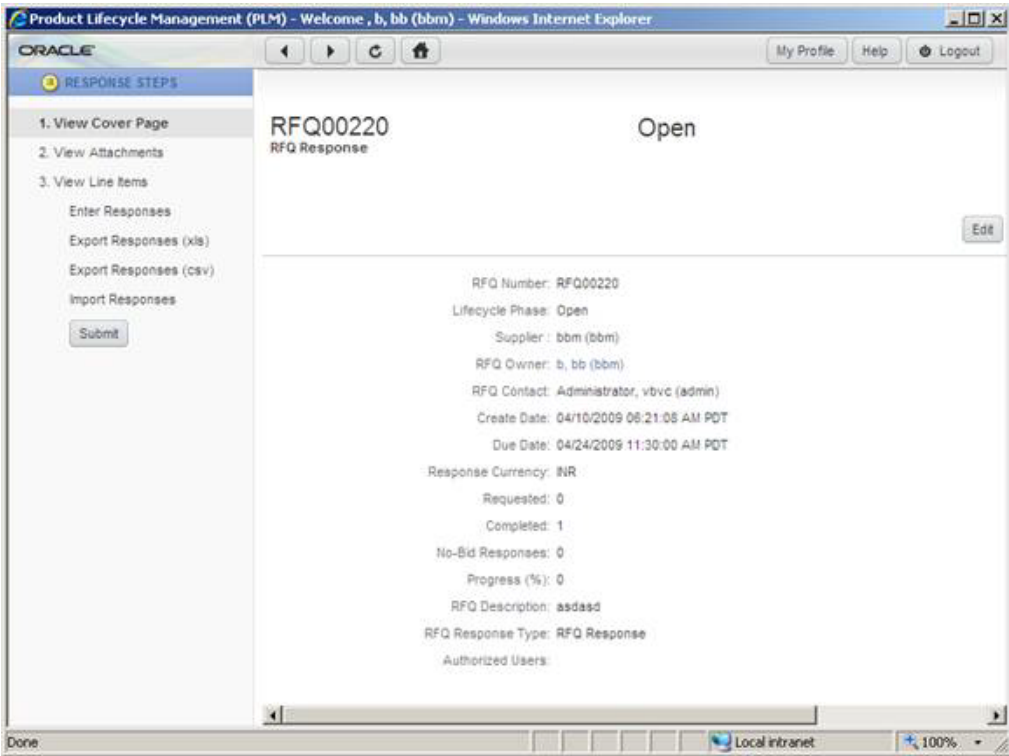
You must use the links in the left pane to navigate through the process. The first three links are in the order that you would want to view the RFQ, that is view the Cover Page, attachments, and then the line items. For example, to view line items, click the link, **3. View Line Items**. The following is an example of an RFQ Response's line items.

Figure 2–3   RFQ Response Line Items in Basic Edit Mode

When editing line items, the Basic edit mode displays a single page, the Response Entry dialog, for each line item. You fill out the fields for one line item, then click the Next button to save your entries and go to the next line item in the RFQ. For more information about the form used to edit responses in Basic edit mode, see "Response Entry Form" on page 4-13. For more information about this mode, see "Basic Edit" on page 4-13.

Overview of Advanced Wizard Edit Mode

If you choose the Advanced Wizard Edit mode, when you log in to PCM you see the Welcome page. As shown below, in this edit mode, you have access to the Folders, Reports, and much more in the left pane.

Figure 2–4   Advanced Wizard Edit Mode
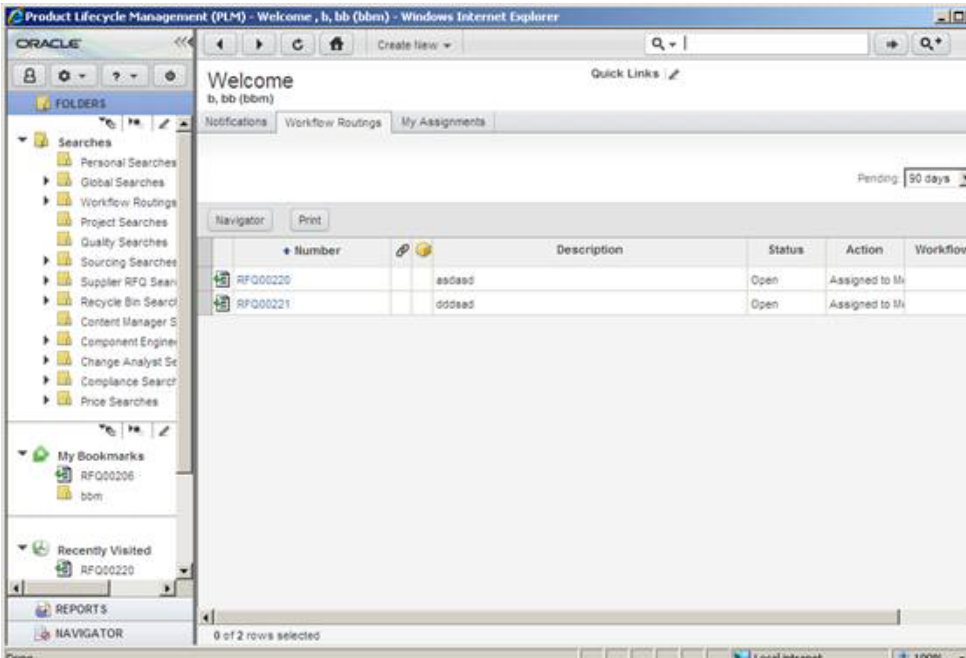
As shown below, when you open an RFQ Response in this mode, there are tabs that help you navigate through viewing the line items, the attachments, and other data relevant to the RFQ.

Figure 2–5   RFQ Cover Page in Advanced Wizard Edit Mode
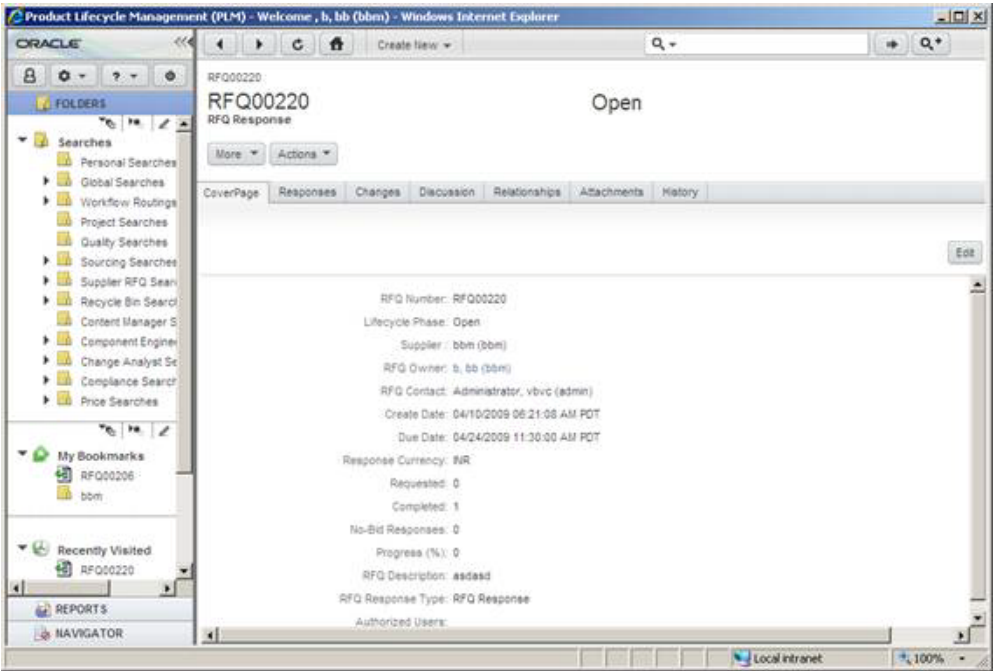
To view line items, you can click the Responses tab. The Responses table contains details for the line items.

Figure 2–6   RFQ Response Lines in Advanced Wizard Edit Mode
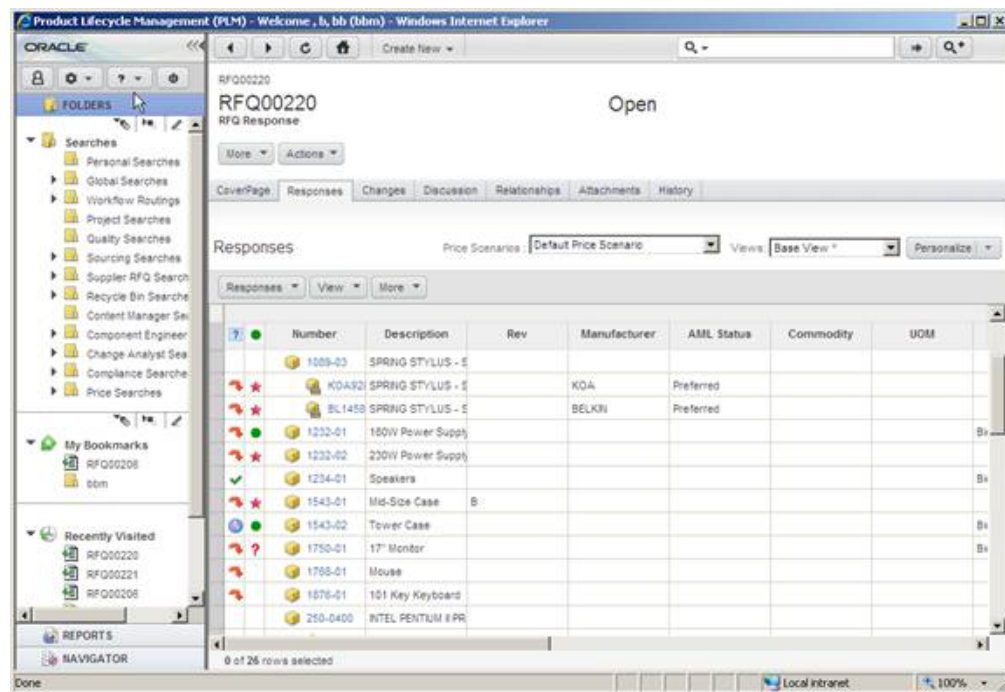
When editing line items, the Advanced Wizard Edit mode displays a single page, the Response Entry dialog, for each line item. You fill out the fields for one line item, then click the Next button to save your entries and go to the next line item in the RFQ. For more information about the form used to edit responses in the Advanced Wizard Edit mode, see "Response Entry Form" on page 4-13. See Advanced Wizard Edit for more details about this mode.

Overview of Advanced Table Edit Mode

If you choose the Advanced Table Edit mode, when you log in to PCM you see the Welcome page. This mode is very similar to the Advanced Wizard Edit mode, as described in Overview of Advanced Wizard Edit Mode on page 16. The difference between the two modes is how line items are edited. In this mode, when you want to edit a field, you type directly into the editable field. Not all fields are editable.

The image below shows how a field appears when it is being edited.

Figure 2–7   RFQ in Advanced Table Edit Mode
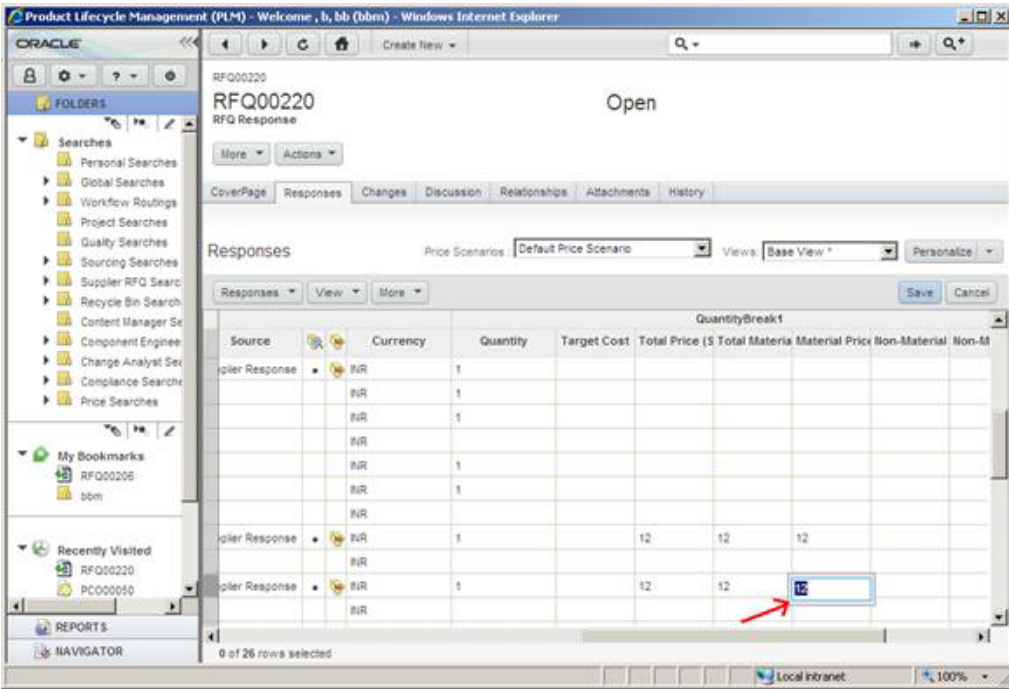
For more details about editing RFQ Responses in the Advanced Table Edit mode, see "Advanced Table Edit" on page 4-10.

3

Managing Supplier Details

This chapter provides information about managing supplier details.

Managing Your Supplier Profile

The Supplier Interface of Agile PCM helps you manage your RFQ Responses. The sourcing manager creates the RFQ and sends it to the suppliers. As a supplier user, you can submit responses to the sourcing manager, view attachments, view the history of your RFQ Responses and (with the appropriate privileges) import or export responses, run reports, and collaborate in price management. For more information, see "Responding to Request for Quotes" on page 4-1 and "Collaborating on Pricing and Contract Information" on page 5-1.

About the Supplier Manager

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

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

Viewing Your Supplier Profile

The easiest way to view your supplier profile is to search for it, and bookmark it. Whenever you must 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 top menu bar, click the down arrow next to the Search to Add icon and select **Supplier** from the dropdown list.

2. Enter your company name in the search field or simply enter * for a wildcard search.

3. Click the arrow to run the search.

4. In the search results (if more than one supplier name appears), click the link for your supplier organization in the Number column.

   The tabbed object for your supplier profile is displayed.

5. From the Actions dropdown list, select **Bookmark**.

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

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

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

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

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

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

> **Note:** You can use the Agile PLM Help system for more information. From the courtesy controls in the left pane, click the Help dropdown menu button and select **Help** from the dropdown list. A window appears with a link to the Agile PLM Documentation website http://www.oracle.com/technology/documentation/agile.html, and a link to the User Productivity Kit help topics.

Fields on the General Info Tab

The General Info tab of a Supplier object contains the fields that are listed in the following table. The Agile administrator can add custom fields to the General Info tab.

Field	Description	Editable?
Name	Name of the supplier.	No
Supplier Type	Indicates if the supplier is of the following types: Component Manufacturer Contract Manufacturer Broker Distributor Manufacturer Representative	No. 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 If you do not have privileges to view the object, the area that would normally display the lifecycle phase will display "No Privilege."
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	Display name of supplier.	No
Description	Text that describes the supplier. The maximum length is set by the Agile administrator.	Yes
Web Supplier	Indicates if this supplier logs in to the Web Client or receives offline communication (Yes / No).	Yes. To use the Agile Web Client to complete and submit RFQ Responses, you must set this field to Yes.
Corporate Currency	The default currency for this corporation.	Yes. Select a currency from the drop-down list.

Field	Description	Editable?
Address	Address.	Yes.
		Enter the correct contact information for your supplier organization.
Geography	Your Country / Continent	No (only editable by an Agile administrator)
City	City.	Yes
Postal/Zip Code	Postal or Zip code.	Yes
Phone	Phone number.	Yes
Fax	Fax number.	Yes
URL	URL for supplier website.	Yes
Maximum Number of Contact Users	The maximum number of supplier users that can be created for this supplier.	No (only editable by an Agile administrator)
Maximum Number of Licensed Contact Users	The maximum number of supplier users that can be assigned a concurrent user license.	No (only editable by an Agile administrator)
Max Number of Named Contact Users	The maximum number of supplier users that can be assigned a power user license.	No (only editable by an Agile administrator)
Default RFQ Recipient	The contact user who automatically receives all RFQs sent to this supplier.	Yes
Default Declaration Recipient	The contact user who automatically receives all declarations for this supplier.	Yes

Buttons on the General Info Tab

The General Info tab of a Supplier object contains the following buttons:

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

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

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

Managing Contact Users

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

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

You can click the Personalize button to specify criteria for viewing only certain information on this tab. For more information, see "Personalizing PCM Object Tabs" on page 1-4.

Creating a Contact User

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

To create a supplier user in Web Client:

1. Open a supplier and click the **Contact Users** tab.

2. Click the **Add** button.

3. Click the Create New button. The *Create New* dialog appears.

4. Enter the **Username**. Type the **Login Password**, and retype it to confirm.

5. Enter the **Approval Password** and retype it to confirm.

> **Note:** If you want to use the same password as what you entered for the Login Password, select the **Use Login Password for Approval** check box. This will disable the Approval Password fields.

6. Enter user details - **First Name**, **Last Name**, and **Email**.

7. Click **Add**.

> **Note:** The supplier must be web-enabled in order for the new user to be able to log in to the system.

Important Profile Fields

Once a contact user is created, you may consider changing some of the following contact user 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).

- **Use Login Password for Approval** - if set to Yes, use one password (login password) for both login and routable object approval.

- **Allow Escalation Designation Approval** - this setting determines whether the user's designated escalation persons can approve a routable object for the user only **After Escalation** or **Always**.

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

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

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

Modifying a Contact User's Information

You can make modifications, such as changing the password and specifying whether the user is active or inactive, to the contact user's information.

To modify contact user information:

1. Search your supplier. For details, see "Viewing Your Supplier Profile" on page 3-1.

2. Click your Supplier Name/Number link. The supplier object appears.

3. Click the **Contact User**s tab.

4. Click the **User ID** link. The *User* page appears.

5. To modify **General Info** tab data, click **Edit**. Make changes as required.

6. To enable or disable the user, select Active or Inactive in the **Status** dropdown list. An inactive user cannot log in to Agile and, therefore, cannot respond to RFQs.

7. 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.

To reset a user password:

1. Open the supplier object and click the **Contact Users** tab.

2. Click the **User ID** link for the user whose password must be changed. The *User* page appears.

3. In the **General Info** tab, click the **Change Password** button. The *Change Password* dialog appears.

4. Type the new login password in the **New Login Password** and **Confirm Login Password** fields. (Passwords are case-sensitive.)

5. Fill in the **Approval Password** fields.

> **Note:** If the **Use Login Password for Approval** field in the user's profile is set to Yes, then you see only the Login Password fields.

6. Click **Save**.

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

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. Open the supplier object and click the **Contact Users** tab.

2. Click the **User ID** link for the user who must deleted. The *User* page appears.

3. In the **Actions** menu, choose **Delete**.

Note: You can delete a contact user only if the contact user is not set as the Default RFQ Recipient for a supplier. If you want to delete the current default, you must set another contact user as the Default RFQ Recipient before you can delete it.

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4. When the confirmation prompt appears, click **OK**.

   The user remains listed on the Contact Users tab, but the user's status changes to Inactive.

Managing RFQ Routing

When a buyer sends an RFQ, it is based on a specific Ship To location. In a supplier organization, you can choose to have the system send notifications of RFQ Responses to specific users based on the Ship To location in the RFQ. If there are multiple supplier users assigned to the same Ship To location, only one of them gets a notification. You can configure the routing rules in the supplier object's **RFx Routing** tab.

If you do not specify RFQ routing rules, all RFQs are 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 add a new routing rule:

1. Open a supplier, and then click the **RFx Routing** tab.

2. Click Add.

3. Select a user from the **Contact** dropdown list.

4. Specify the **Geography** by selecting the continent, country/area, and state/province/region to associate with the contact user.

5. Click Add.

To edit a rule:

1. Open a supplier, and then click the **RFx Routing** tab.

2. Make the required changes directly to editable fields, for example, Continent.

3. To undo the changes that you made to the RFx Routing tab, click **Cancel**. To save your changes, click **Save**.

To delete a rule:

1. Open a supplier, and then click the **RFx Routing** tab.

2. Select the routing rule that you want to delete.

3. Click **Remove**.

To change the default recipient:

1. Open a supplier, and then click the **General Info** tab.

2. Click **Edit**.

3. Select the **Default RFQ Recipient** from the list of contact users for the supplier.

4. Click **Save**.

Changing the Default Recipient

After a supplier is created, the first contact user that is 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. Open the supplier and click the General Info tab.

2. Click **Edit**.

3. Use the dropdown list next to the Default RFQ Recipient field to select a user.

4. Click **Save**.

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 supplier should have one manufacturer line card per manufacturer per location.

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

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

> **Note:** You must have the correct privileges to add and remove manufacturer offerings. The Agile PLM Administrator needs to modify your *(Restricted) Modify My Supplier Profile* privilege.

Creating a New Manufacturer Offering

You can specify general information about 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, with 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.

When you create an offering, make sure the geographical data you specify is not narrower than an existing offering for the same manufacturer or commodity. For example, if the *Region/Province/State* for an existing offering is set to all locations (by selecting the root Location folder), you cannot create a new offering for the same

manufacturer or commodity with the *Region/Province/State* set to California because the existing offering covers a broader region.

If you choose to add a manufacturer offering by Geography, rather than Ship To location, an offering is only added if there is a Ship To location defined in that particular region.

For example, assume that the following are the only Ship To locations defined in the system:

- Santa Clara, CA, USA

- Los Angeles, CA, USA

- Bangalore, India, Asia

If a user uses the Geography option and selects *San Jose, CA, USA* as the geographical location, the system does not add any rows to the Manufacturers table, because there are no Ship To locations defined for that specific location. On the other hand, if the user selects *CA, USA* as the location, the *Santa Clara, CA, USA* and *Los Angeles, CA, USA* Ship To locations are added, because those locations are included in the broader region of *CA, USA*.

To create a manufacturer offering:

1. Open the supplier object.

2. Click the **Manufacturers** tab.

3. Click the **Add** button. The *Add Manufacturer Offerings* dialog appears.

4. If you already know the manufacturer name, type it into the field. Otherwise, you can click the Search to Add icon to select the **Manufacturer Name**. Searches are provided to lead you through the process of selecting a manufacturer.

5. Select a **For Locations** option. You can define the offering by a Ship To location or by Geography, which defines the continent, country, and area.

6. If you selected **Geography**, specify the continent, country/area, and state/province/region. If you selected **Ship To**, specify one or more locations by clicking the icon or by simply typing the location(s) into the field.

7. Select the **Rating** from the dropdown list.

> **Note:** During the RFQ dissemination process, suppliers receive notifications based on the rating criteria set by the buyer when the RFQ is created.

8. Click **Add** 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. Open the supplier object.

2. Click the **Manufacturers** tab.

3. Select the row(s) of manufacturer offering(s) that you want to delete.

4. Click **Remove**.

Filtering the Manufacturers Tab

You can filter the **Manufacturers** tab to display only certain information. Click the **Personalize** button to specify what information you want to see. For more information, see "Filtering Objects" on page 1-6.

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.

> **Note:** You must have the correct privileges to add and remove commodity offerings. The Agile PLM Administrator needs to modify your *(Restricted) Modify My Supplier Profile* privilege.

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 commodity and Ship To locations. You can have multiple lines for each commodity, with 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.

If you choose to add a commodity offering by Geography, rather than Ship To location, an offering is only added if there is a Ship To location defined in that particular region.

For example, assume that the following are the only Ship To locations defined in the system:

- Santa Clara, CA, USA

- Los Angeles, CA, USA

- Bangalore, India, Asia

If a user uses the Geography option and selects *San Jose, CA, USA* as the geographical location, the system does not add any rows to the Commodities table, because there are no Ship To locations defined for that specific location. On the other hand, if the user selects *CA, USA* as the location, the *Santa Clara, CA, USA* and *Los Angeles, CA, USA* Ship To locations are added, because those locations are included in the broader region of *CA, USA*.

To create a commodity offering:

1. Open the supplier object.

2. Click the **Commodities** tab.

3. Click the **Add** button. The *Add Commodity Offering* dialog appears.

4. If you already know the commodity name, type it into the field. Otherwise, you can click the Search to Add icon to select the Commodities.

5. Select a **For Locations** option. You can define the offering by a Ship-to location or by Geography, which defines the continent, country, and area.

6. If you selected **Geography**, specify the continent, country/area, and state/province/region. If you selected Ship To, specify one or more locations by clicking the list icon or by simply typing the location(s) into the field.

7. Select the **Rating** from the dropdown list.

> **Note:** During the RFQ dissemination process, suppliers receive notifications based on the rating criteria set by the buyer when the RFQ is created.

8. Click **Add** 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. Open the supplier object.

2. Click the **Commodities** tab.

3. Select the row(s) of the commodity offering(s) that you want to delete.

4. Click **Remove**.

Filtering the Commodities Tab

You can filter the Commodity tab to display only certain information. Click the Personalize button to specify what information you want to see. For more information, see "Filtering Objects" on page 1-6.

Editing Manufacturer and Commodity Offerings

You can edit a manufacturer offerings and commodity offerings. To edit an offering on the Manufacturers or Commodities tab of the supplier, click directly in the field you want to edit and make changes, as needed. Some fields may not be editable.

> **Note:** For the first field you attempt to edit, you will have to double-click in it to make it editable. Any subsequent fields will only require a single-click to enable editing.

While editing, you can edit multiple rows simultaneously by using the Fill-up and Fill-down options through the More button. For example, if you changed the Rating field for one offering, but wanted the same rating value for a few of the offerings below it, you can select the Rating table cell for the offerings that should be copied and the Rating cells of the offerings to which you want the value copied. When you click More > Fill-down (selected cells) the value that was in the first price line that you selected is copied to the selected cells below it. There are also keyboard shortcuts available for these edit options.

4

Responding to Request for Quotes

This chapter provides information about responding to requests for quotes.

Working with RFQ Responses

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

As an RFQ responder, you can:

- Determine the bid or no-bid decision for each part, and complete the requested response information for the parts you have chosen to bid.

- Propose alternate parts, instead of the part specified in the RFQ, from a manufacturer not in Agile database.

- 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 may also get a notification email, depending on notification settings.

You can respond to RFQs within PCM, or you can export the response line items to a text file and use an external text editor, such as Microsoft Excel, to respond. In Advanced Wizard Edit mode and Advanced Table Edit mode, you view RFQ Response information on a set of tabs on the RFQ Response object page. In Basic edit mode, the RFQ Response information is displayed on pages that are accessible through hyperlinks.

> **Note:** For information about entering and submitting RFQ response information, see "Completing RFQ Responses" on page 4-6.

Before you can proceed with an RFQ, you may be required to accept the Terms and Conditions, if they have been set mandatory by the buyer. Should you choose to decline, you will not be able to view the RFQ and you will be returned to your Notifications Inbox. These Terms and Conditions prescribe buyer's expectations and RFQ-specific stipulations.

If you forward an RFQ to another user in your organization, he or she must also accept the Terms and Conditions to proceed further with it.

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

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 the view of response details. Propose alternate manufacturer parts. Enter or modify response details. Set expiration dates. Export or import response line details. Submit selected response lines.
Changes	Displays changes made to the RFQ Response by the sourcing manager.	View change details by item view or response view. View item change summary by items that were added, deleted, or changed.
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

The RFQ Response process flow is shown in the following diagram

Figure 4–1   Steps in Basic Edit Mode
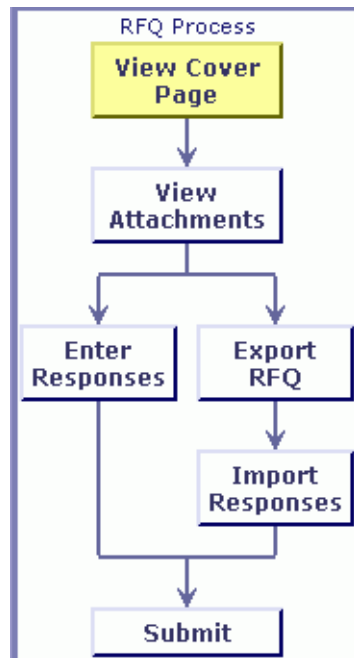
In Basic edit mode, a list of the process flow steps is displayed in the left pane.

- **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.

- **View Line Items** - Opens the RFQ Response Responses tab.

- **Enter Responses** - Selects all items in the RFQ and lets you fill in cost information using your preferred response edit mode.

- **Export Responses (xls)** and **Export Responses (csv)** - 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.

In Basic mode, you can click a link in the process flow list to initiate that action. If the action requires a selection, you are redirected to the appropriate page to make the selection. In some instances, you cannot go to a step in the process until you have completed the previous step.

In Advanced Table Edit and Advanced Wizard Edit modes, you can complete these actions using the menu buttons on the tabs of the RFQ Response object.

About RFQ Response Lifecycle Phase

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

Lifecycle Phase	Description
New	New indicates that you have not yet opened and reviewed the RFQ Response. This is the lifecycle phase of an RFQ Response when it first appears in your inbox.
Open	Open indicates that you can modify and work with the RFQ Response. When you open a new RFQ Response, the lifecycle phase changes to Open. You can modify an open RFQ Response, including entering response information on the Responses tab and submitting responses.
Locked	Locked indicates that the sourcing manager has locked the RFQ associated with this RFQ Response. Suppliers cannot make any modifications to the Responses if the Buyer has locked the RFQ. Although you may be able to still enter data, the system throws an error if you attempt to save any changes.
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

When you view an RFQ Response in either Advanced Table Edit mode or Advanced Wizard Edit mode, 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.

The RFQ Response Actions menu enables:

- Bookmark the RFQ Response for fast, convenient access.

- Send the RFQ Response to other users with appropriate privileges.

- Forward your RFQ Response to another user within your company.

- Subscribe to an RFQ Response so that you can be notified when any field that you have subscribed to 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.

- Copy a URL to the clipboard.

Bookmarking RFQ Responses

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

You can delete bookmarks you no longer need.

To delete a bookmark:

1. Click the **Organize Bookmarks** icon in the My Bookmarks folder in the left pane.

2. If the bookmark you want to delete is in a bookmark subfolder, navigate to that folder.

3. Select the row(s) of the bookmark(s) you want to delete.

4. Click **Remove**.

5. Click **Save**.

Sending RFQ Responses

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

> **Note:** When you send an RFQ Response, the ownership of the RFQ Response is not changed. If you want to transfer ownership of an RFQ Response to another user in your supplier organization, use the Forward action, described in Forwarding RFQ Responses on page 37.

To send an RFQ Response:

1. Open an RFQ Response.

2. Choose **Actions** > **Send**. The *Send* dialog appears.

3. Click the Address Book icon next to the **Notify** field to find and select the users or groups to whom you want to send the RFQ Response.

4. Enter comments, as needed. Your comments are included in the body of the message.

5. Click **Send**.

> **Note:** Click the **Send notification as urgent** check box to set the notification message's priority flag to *High*.

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 can no longer edit it, but you can still view it. Also, if needed, the person you forward the RFQ Response to can forward it back to you. When an RFQ Response is forwarded, the initial supplier contact user remains the primary contact. If the buyer modifies the RFQ Response in any way, it automatically reverts to the initial supplier contact and disappears from the second contact user's workflow routings. You can specify a comment to accompany the notification when forwarding a response.

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

To forward an RFQ Response:

1. Open an RFQ Response.

2. Choose **Actions** > **Forward**. The *Forward Response* dialog appears.

3. Select the user to whom you want to forward the RFQ Response in the Notify dropdown list. The list includes the contact users related to the organization.

4. Enter comments, as needed.

5. Click **Send**.

> **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 to open the RFQ. A record of forwarding is maintained on the History tab.

As an alternative, you may choose to have users work in parallel, instead of waiting for the RFQ Response to be forwarded along. To allow users to work in parallel, see "Authorized Users" on page 4-5.

Authorized Users

An authorized user is a user within your organization who is authorized to work with a particular object. For example, you can select one or more authorized users for an RFQ Response. Authorized users can work on the RFQ Response in parallel. Alternatively, if you want the authorized users to work in sequential order, one authorized user can work on an RFQ Response and then forward it to the next user when they are done.

To add an authorized user to an RFQ Response:

1. Open an RFQ Response.

2. Click **Edit** on the CoverPage tab.

3. Type in the users you want to add or click the Address Book icon next to the **Authorized Suppliers** field to search.

4. Click **Save** once you have added the suppliers.

Completing RFQ Responses

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

■   From the **Notifications** tab in your Inbox - You receive notifications about subscriptions or completed processes and requests to accept ownership of an action item or activity. Click the new notification message. Click the RFQ number on the Notifications & Requests page to open the RFQ Response object.

■   From RFQ Response searches - Search for RFQ Responses. On the search results page, click the RFQ number you want.

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

Using the Responses Tab to Respond to RFQs

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

> **Note:**   In Basic response edit mode, you can do these things on the Response page, which is accessible by clicking the *View Line Items* link in the left pane.

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

Responses Tab

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

Responses Table

In addition to non-material and material price fields for each price scenario (quantity break or price period), 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 dropdown Lists

The three action buttons that are available on the RFQ Response Responses tab are:

- **Responses** - You can to choose Enter/modify, Bulk Edit Expiration Dates, or Submit an RFQ Response. You can also Propose Alternate Parts, Delete Alternate Parts, or Lookup Prices.

- **View** - View Costed Bill of Materials or view Bill of Materials Structures.

- **More** - Fill-up, Fill down, Fill-up (selected cells), Fill down (selected cells), Export, and Import content.

Optional Buttons

These buttons are optional and configurable in the "data to share with suppliers" section in the RFQ (or the associated sourcing project). Adjacent to the Responses drop down lists, there are two optional buttons:

Costed BOM - Limited view of BOM items and prices; only part of the BOM is actually quoted to this supplier. Parts in the hierarchy that have not been requested for quotes are not displayed.

Content BOM - View of a BOM and each item's children parts. If an assembly is quoted as a Component/Custom Component, the BOM tree underneath the assembly does not appear in the Costed BOM view, but is visible in the BOM Content view.

> **Note:** These buttons cannot be added once the RFQ has been opened to suppliers.

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 item to be managed and tracked separately.

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

Symbol	Represents	Description
	Pending	This icon indicates that the response information for the item has not yet been submitted.
	Ready	This icon indicates that all requested response information has been entered for the item and 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.
		In the Advanced Wizard and Basic edit modes only, when you click this icon, the response goes into edit mode and fields that need attention are indicated by ⚠
	Submitted	This icon indicates that the response for this item has been submitted.
	Error	This icon indicates that a field is invalid and must be fixed.
	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 a requote.
	Details	This icon marks the Price Details (Has Price Information) column. If a line item has in this column, it means that it has price information available for it. You can click the dot icon to view the response price details for the item.
	Supplier Proposed	This icon indicates that this is an alternate manufacturer part that you proposed.
	Quantity Changed or New Line Added	The buyer has changed quantities or added a new line to the response since it was submitted.
	View Response Changes	Click this icon to view the history of the changes that have been made to the response for this item.

RFQ Price Scenarios

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

- **All Price Scenarios** - View all price scenarios associated with the response.

- **Default Price Scenario** - View the default price scenario associated with the response. The default is defined as the lowest quantity break of the effectivity period that falls within today's date, or the earliest effectivity period.

- **Selected Price Scenarios** - Select from a list of price scenarios.

To view information for a selected price scenario:

1. Open an RFQ Response, and go to **Responses** tab.

2. In the **Price Scenarios** dropdown list, select Selected Price Scenario. In the window that appears, select the price scenarios you want to show from the **Hidden Fields** list. Click the right arrow to add them to the **Displayed Fields** list.

3. Click **OK**.

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

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

Pre-defined Views

The pre-defined filters available on the Responses tab are as follows:

- Items Need Response - Identifies those parts for which the supplier has to provide prices or update prices (in case of requotes) and resubmit.

- Items With Split - Displays items whose AML have AML splits.

- Preferred AML - Displays items that have AML where the status is set to "preferred".

You can also personalize the view of the Responses tab, and other tabs, using the *Table Personalization* palette. For more information, see "Personalizing PCM Object Tabs" on page 1-4.

Entering and Modifying RFQ Response Information

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

- **Online** - Enter the information online in the Agile Web Client. For details, see "Creating Online Responses" on page 4-10.

- **Offline** - Export the selected response lines of the Responses tab to a file, edit the exported file in a spreadsheet program, such as Microsoft Excel, and then import

the edited file, with your data, into Agile PLM. For details, see "Creating Offline Responses" on page 4-17.

Creating Online Responses

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, if your preferred Response Edit Mode is set to Basic, you can click any step in the process flow list to move to that corresponding page. The step you select is highlighted in the left pane, so that you can tell where you are in the process. Otherwise, if you are not using Basic response edit mode, click individual tabs in the RFQ Response to create your online response.

For more information on process flow, see "About the RFQ Response Process Flow" on page 4-2.

Online Edit Methods

You can enter response information online in any of the three following ways:

- Advanced Table Edit
- Advanced Wizard Edit
- Basic Edit

Specify the method you want to use on the Preferences tab 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

In Advanced Table Edit mode, you can enter bids for multiple line items in a single view. You can enter responses directly in the fields on the **Responses** tab.

> **Note:** In this edit mode, you must double-click the first field you want to enter, however, any following fields are made editable with just a single-click (or by using the Tab keys).

To enter response information using the Advanced Table Edit method:

> **Note:** Make sure your Response Edit Mode preference is set to Advanced Table Edit. For details, see "RFQ Response Edit Mode" on page 2-2.

1. Open the RFQ Response that you want to work with, and go to **Responses** tab.

2. Select a different bid decision from the **Bid Decision** dropdown list, if appropriate.

3. For each quantity break, provide the material price and non-material price (if applicable).

   The edit function for Material and Non-material prices depends on the Quote As method set by the buyer:

   - **Assembly** - You can edit only the Non-material price.

- **Component** - You can edit only the Material price.

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

4. Enter or change the quantity in the **Inventory Available** field.

5. Fill in the **Valid From** field, if appropriate.

6. Change the expiration date in the **Valid Until** field, if appropriate.

7. When you are finished, click **Save**, or click **Cancel** to return to the previous page without saving your entries.

> **Note:** A question mark icon appears next to any line item that has not been correctly completed. Although all valid fields are saved to the database, you cannot submit a response to the sourcing manager until invalid required fields are completed.

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

> **Note:** You can copy response data values from one cell to another. Select the value you want to copy and press Ctrl + C. Place the cursor on the destination cell, and press Ctrl + V to paste the copied value. Alternatively, you can click More > Fill-down or More > Fill-up to copy the contents of one cell to the rows below or above it, respectively.

Advanced Wizard Edit

In Advanced Wizard Edit mode, you can enter your bid for a single line item at a time. You can also enter identical bids for all selected line items simultaneously. In this mode, all bids are entered through the Response Entry dialog.

To enter response information using the Advanced Wizard Edit method:

> **Note:** Make sure your Response Edit Mode preference is set to Advanced Wizard Edit. For details, see "RFQ Response Edit Mode" on page 2-2.

1. Open the RFQ Response and go to **Responses** tab.

2. Select the line item(s) that you want to work with, and choose **Responses** > **Enter**. The *Response Entry* dialog appears.

3. Select a different bid decision from the **Bid Decision** dropdown list, if appropriate.

4. Enter or change the quantity in the **Inventory Available** field.

5. Fill in the **Valid From** field, if appropriate.

6. Change the expiration date in the **Valid Until** field, if appropriate.

7. For each quantity break, provide the material price and non-material price (if applicable).

   The edit function for Material and Non-material prices depends on the Quote As method set by the buyer:

- **Assembly** - You can edit only the Non-material price.

- **Component** - You can edit only the Material price.

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

8. 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, click the Fill Right button. The value is copied into the column to the right.

9. Click **Next** 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 of the selected response lines, check the box labeled Apply to all the selected response lines and click Finish.

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

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

> **Note:** A question mark icon appears next to any line item that has not been correctly completed. Although all valid fields are saved to the database, you cannot submit a response to the sourcing manager until invalid required fields are correctly completed. To complete an invalid entry, select the line item and then click the question mark icon. The RFQ Response goes into edit/modify mode and any invalid fields are indicated by the invalid icon.

Response Entry Form

Figure 4–2   Response Entry Form in Advanced Wizard Edit Mode

On this form there is an **Apply to all the selected response lines** check box. When you check this box, the data (Inventory Available, Material Price, Valid Until, and so on) that you fill in for the current item, is applied to all the other response lines that you selected for editing.

Basic Edit

This method is similar to the Advanced Wizard Edit method, as described in Advanced Wizard Edit. When you open an RFQ, you only see the Cover Page. You do not see tabs in this mode. To display line items, you must click **View Line Items** in the list of process flow steps in the left pane. To display the Response Entry dialog, you must click **Enter Responses** in the left pane.

> **Note:**   A question mark icon appears next to any line item that has not been correctly completed. Although all valid fields are saved to the database, you cannot submit a response to the sourcing manager until invalid required fields are completed. To complete an invalid entry, select the line item and then click the question mark icon. The RFQ Response goes into edit/modify mode and any invalid fields are indicated by the invalid icon.

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 Responses' **Responses** tab.

2. Choose **Responses** > **Bulk Edit Expiration Dates**. The *Set Expiration Date* window appears.

3. Enter the expiration date in the Date field, or select a date from the calendar.

4. Click **Set**.

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 only propose alternates for items with an AML.

2. Choose **Responses** > **Propose Alternate Part**. The *Add Alternate Part* dialog appears.

3. Enter the alternate manufacturer part **Number** and **Description**.

4. Click the Lookup button next to the **Manufacturer** list to search and select the part's manufacturer. Click **Continue**.

5. Fill up all the required information.

6. Click **Save**. The added manufacturer part is identified by the Supplier Proposed icon.

   > **Note:** If the proposed manufacturer is not currently in the Agile database, use the following workaround procedure.

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

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

2. Follow steps 2 and 3 from the preceding procedure, *To Propose an alternate manufacturer part*.

3. Click the button next to the **Manufacturer** list to search and select the part's manufacturer. (Enter "New" in the search field.)

4. Click **Continue**.

5. Fill up all the required information.

6. Click **Save**. 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, click the number of the alternate part to which you want to add an attachment. The *Quick View* for the part appears.

2. Click the Attachments tab.

3. Click Add > Files, Add > URLs (proceed to step 5), or Add > By Search (proceed to step 6).

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

> **Note:** Before reaching the Add File dialog box, you may see a dialog box asking you to choose between the standard upload method or the advanced Java tool. If you select the Java upload tool, the following steps will be carried out in a Java based dialog box. Otherwise, you will be led to the standard HTML based file search and add window.

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

a. In the Add File dialog window, use the Browse button to locate the files you want.

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

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

6. 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. To add the selected URLS in one folder object, check the Add All URLs to a Single File Folder check box.

d. When you are through, click Add. The URLs and newly created file folder objects are listed in the Attachments table.

7. If you chose Add > By Search, the *Add Files* window appears.

a. Search for and select the file folder you want, then select files or URLs in that file folder that you want.

8. To return to the Responses tab, click Close in the *Quick View* window.

Deleting Proposed Alternate Parts

You can delete alternate parts that you have proposed.

To delete alternate parts:

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

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

2. Choose Responses > Delete Proposed Alternates.

Looking up Prices

You can verify the existence of a price scenario for a specified period and quantity in the Item Master.

In Agile PCM, there are three types of prices:

- Contracts - Predefined agreements for item prices over a specified time period.

- Published Prices - Item price information that has been published from other projects to the Item Master.

- Quote Histories - Quoted prices that were previously received for an item.

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

> **Note:** You only have access to prices that are relevant to your organization. You will not be able to look up prices supplied by other suppliers.

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

Looking Up Contracts, Published Prices, or Quote Histories

You can look up contract prices, published prices, or quote histories.

> **Note:** Selection of the price details depends on the Look Up criteria mentioned. To break ties between prices, the deciding factor can be Lowest Price or Lead Time or Most recent response.

To look up prices:

1. Open a RFQ Response and select the Responses tab.

2. Select the row(s) of the item for which you want to look up contract pricing information.

3. Choose Responses > Price Lookup. The *Price Lookup from Item Master* dialog appears.

4. Select a price scenario from the Base Scenario dropdown list.

5. Click the button next to the Price Types field. Select either Contract, Published Price, or Quote History or a user-defined price type.

6. Decide whether to Populate Price to all scenarios or just one.

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

7. Enter the quantity deviation, in percentage, to search for in the Item Master if you select that option, or select the Ignore Quantities button to ignore the quantity.

> **Note:** For example, if the quantity in an RFQ is 100 and a user gives a 10% deviation range, the system finds prices for the part that are within the quantity of 90 and 110.

8. Enter the number of days from the RFQ date range, plus or minus, within which the quotes have been received or select the Ignore the date ranges button to ignore the date of quote.

9. Select the Lowest Price, Shortest Lead time, or Most recent response button to filter the results if multiple rows are retrieved.

> **Note:** For the *Most recent response* option to function accurately, the Agile administrator must have enabled the attribute *Priceline.DateModified* in the Java Client. By default, this attribute is disabled. To use this search option, the Agile administrator must enable the *Priceline.DateModified* attribute in the Java Client for the privilege *(Restricted) Read my Organizations Prices* under UserSettings > Privileges > Read.

10. Optional

    You can narrow down your look up criterion across

    - a particular Ship To Location
    - specific Program(s)
    - specific Customer(s)

11. Click Look Up.

Creating Offline Responses

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

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

Exporting RFQ Response Lines

You can export response lines to your local hard drive as a comma-delimited file (CSV) or Excel Workbook (XLS) file.

To export response lines:

1. Open the RFQ Response.

2. Click the Responses tab.

3. Click the row selection cells of the response line items you want to export (use the ctrl keyboard button to select multiple lines) or click the *All Rows Selection* cell to select all.

4. Click More > Export (xls) or More > Export (csv). The *File Download* dialog appears.

5. Save the file to the desired location.

For more details, see the *Import/Export User Guide*.

Editing Supplier Response Fields in Exported Supplier Response Files

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

As shown below in the spreadsheet example, a color legend indicates more information about a field. The following legend is used:

- *Required* fields are shaded yellow, with bold headings and 'must be' filled for the response acceptance.

- *Requested* fields are also shaded yellow, however, they have normal headings and are optional.

- Gray shaded fields should not be filled at all, while the white shaded fields are informational.

Figure 4–3   Example of a Spreadsheet for Export

To successfully import a 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.

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

- Empty fields are not imported. They are not equal to 0. To set a numeric field or a price field to 0, you must explicitly enter the value 0.

- If you prefer, you can remove the <HEADER> section at the top of the file since it is not imported. To remove this section, make sure you remove the two rows containing the <HEADER> and </HEADER> tags and all rows in between.

- When you import the supplier response file, the imported data replaces existing response field data.

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

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

Valid Values for Supplier Response Fields

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

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

Field	Valid Values	Note
Bid Decision	Bid	NA
	Bid - Alternate Part	
	No Bid - Non-Franchise	
	No Bid - Obsolete Part	
	No Bid - On Allocation	
	No Bid - Other	
	No Bid - Unknown Part	
	Not responded	
Country of Origin	NA	Enter a valid country name. Make sure the spelling is correct.
NCNR	Yes, No	Non-Cancellable, Non-Returnable
Terms of Sale	CFR	Cost and Freight
Terms of Sale	CIF	Cost, Insurance, and Freight
Terms of Sale	CIP	Carriage and Insurance Paid To
Terms of Sale	CPT	Carriage Paid To
Terms of Sale	DAF	Delivered at Frontier
Terms of Sale	DDP	Delivered Duty Paid
Terms of Sale	DDU	Delivered Duty Unpaid
Terms of Sale	DEQ	Delivered Ex Quay (Duty Paid)
Terms of Sale	DES	Delivered Ex Ship
Terms of Sale	EXW	Ex Works
Terms of Sale	FAS	Free Alongside Ship
Terms of Sale	FCA	Free Carrier
Terms of Sale	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.

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.

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 More > Import. The *Import* dialog appears.

4. Click Browse; select the file you want to import.

5. Select the appropriate configuration options.

> **Note:** If you are importing a CSV file, you must select the same encoding type used to export the file.

6. Click Import.

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 must be setup by the author of the RFQ. For more information on setting up and enabling suppliers to view the Content BOM, contact the Agile administrator.

> **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. Open the RFQ Response.

2. Go to the Responses tab.

3. Click View > Costed Bill of Materials.

4. To view a specific price scenario:

    a. Select Selected Price Scenario in the Price Scenarios dropdown list. The Price Scenarios dialog box appears.

b. Select the price scenario information from the Available Values, and then click right arrow to add to the Selected Values list.

c. Click OK.

5. 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 appear 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. Go to the Responses tab.

3. Click View > Bill of Materials Structures.

4. The Bill of Materials Structures 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.

> **Note:** The Assembly Cost report is not available in Basic edit mode.

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

3. Click Assembly Cost (Supplier Response). The tabbed report object page appears in the right pane.

4. To run a report, click the Execute button. The report wizard page appears.

5. In the *Select Layout and Configuration* step, select Default Layout from Layout type dropdown list. Click Next.

6. In the *Select Response* step, select the RFQ Response you want to use from the dropdown list. Click Next.

> **Note:** In order for an RFQ to appear as an option in this step, the buyer must have included "Costed BOM View" as "data to share with suppliers."

7. In the *Select Items* step, click the icon next to the Assembly Lines field to choose the assembly lines (BOMs) you want. Select an assembly line by double-clicking the desired row or by dragging selected table rows to the Assembly Lines cell on the *Select Items* wizard page.

8. Click the icon next to the Price Scenarios field to choose the price scenarios you want in the report. Your choices are outlined below. Select a price scenario by double-clicking the desired row or by dragging selected table rows to the Price Scenarios cell on the *Select Items* wizard page.

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

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

Submitting Responses

You can make changes and resubmit RFQ response lines anytime, and as many times as you want, 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 a question mark icon in the Supplier Response Status column to the left of the item number.

To fill in an incomplete response line:

1. Click the question mark icon in the Response Line Status column to the left of the item number. In Basic and Advanced Wizard Edit mode, the Response Entry dialog for the item appears. The invalid fields are indicated by an invalid icon. For details, see "RFQ Response Edit Mode" on page 2-2.

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. Click 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. Click Actions > Submit (or the Submit button in Basic response edit mode) to submit a complete RFQ Response. Any response lines that are eligible for submittal will be sent to the buyer.

Reviewing RFQ Response Changes

The Changes tab of an RFQ Response enables 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 clicking the Project Item Changes sub-tab. You can use the Views dropdown to see only the items that have been added, deleted, or modified.

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

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

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

The price details column is indicated by a Details icon. Click the in the Has Price Information 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 4-9. You cannot submit responses if the RFQ status is locked or closed.

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

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

You receive notifications, according to notification settings, about changes that have been performed. You can display the Changes tab of an RFQ Response to view the changes. Also, response lines that have been modified or recently added by the buyer are indicated by a star icon in the Response Readiness Status column on the Responses tab.

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 create and add discussions:

1. Open the RFQ Response and select the Discussion tab.

2. Click Add. A new row appears in the Discussions table.

3. Click the Create New button. The *Create New* dialog appears.

    > **Note:** You can also add an existing discussion by clicking the Search to Add button and searching for it.

4. Select the type of discussion from the Discussion Type field

5. Enter the subject in the Subject field.

6. Enter discussion text in the Message field.

7. Select the priority of the message from the Priority dropdown list.

8. Click the Address Book button next to the Notify List field, and select the names of recipients.

9. Click Add. A notification is sent to the users in the Notify List.

Replying to a Discussion

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

You can access a discussion by clicking on the Discussion tab of the RFQ Response that is associated to the discussion. Alternatively, you can access the discussion from your Notifications inbox. From within your inbox, click the subject in the *Regarding* column to open the discussion.

To reply to discussions:

1. On the Discussion tab of the discussion object, click Reply. The *Reply to Discussion* dialog appears.

2. Enter the reply in the Message field.

3. To change the list of recipients, click the Address Book button next to the Notify List field. Select the names of recipients.

4. Click Send.

    > **Note:** You can send any number of replies in a discussion.

Removing Discussions

After you finish all your discussions, you can remove them from the Discussions tab of the RFQ Response object.

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

1. Open the RFQ Response and click the Discussions tab.

2. Select the row of the discussion you want to remove.

3. Click Remove on the Discussions tab.

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

5

Collaborating on Pricing and Contract Information

This chapter provides information about collaborating on pricing and contract information.

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 entities:

- **Price** - This is where you record the prices for items or manufacturer parts. A price object can have multiple price lines. You can add it to any PCO without having to create a 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 content change, manufacturing change orders, engineering change orders, and so on. Each change is called a revision. All the price lines associated with the price object are for the specified revision of the item only.

> **Note:** You can personalize the view on some Price object tabs. To learn more about the personalization features, see "Personalizing PCM Object Tabs" on page 1-4..

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 New** 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*.

- Using the **Actions** menu in an item or manufacturer part

You must have *Read* privilege for the Item object or Manufacturer Part object to create a price from the Actions menu.

To create a price from the Create New menu:

1. Choose **Create New** > **Prices** > **Published Price**. The *Create Published Prices* dialog appears.

2. Select a price type from the **Type** dropdown list. Once you select a price type, additional fields appear on the dialog page.

3. A unique, system generated number may be automatically filled in the **Number** field on the basis of Price Type you selected. Based on the settings defined by your Agile administrator, you may be able to modify this number, give one of your own, or click the AutoNumber button to generate a new number.

4. Select the **Part Type** (Item or Manufacturer Part) from the dropdown list.

5. Click the Search to Add button to search and select an item or manufacturer part from the *Search Object* palette. It fills up the field with corresponding part number.

   If you selected **Item** from Item/Manufacturer Part list, a Rev dropdown list appears for you to select its Revision, for example, Introductory.

   If you selected **Manufacturer** Part in Item/Manufacturer Part list, the Rev dropdown list does not appear as its revision is not in your control.

6. Select the **Manufacturing Site** from the dropdown list.

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

7. Click the Search to Add button to search and select Suppliers through the *Identify Suppliers* palette.

   Note: Only your supplier organization will be listed in the search results.

8. *Optional:* Select a **Program** from its dropdown list.

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

9. *Optional:* Select a **Customer** from its dropdown list.

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

10. Click **Save**. The new price's cover page appears.

11. To add a new price line, go to the Price Lines tab. For more information about adding price lines, see "Adding Price Lines" on page 5-6.

12. To add a new attachment, go to the Attachments tab.

General Information Tab

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

Field	Editable?	Description
Mfr. Part Number (or Item Number)	No	The unique identification number of the manufacturer part (or item) for which the price is intended.
Mfr. Name	No	The name of the manufacturer.
Mfr. Part Number (or Item Rev)	No	The unique identification number of the manufacturer part or revision number of the item for which the price is intended.
Mfr. Name	No	The name of the manufacturer.
Supplier	No	The supplier of the item.
Price Type	No	The type (subclass) of the price object. The default types are Contract, Published Price, and Quote History. The Agile administrator can rename the price types or create additional price types.
Number	No	The unique identification number of the price object.
Description	Yes	The description of the price object.
Lifecycle Phase	No	The lifecycle phase of the price.
Version	No	The version of the price.
Allow Qty Breaks	Yes	A flag indicating whether the price information applies to quantity breaks or not.
Owner	Yes	The user responsible for the price information.
Customer	No	The customer to which the price information applies. If customer is not specified, the price information applies to all customers.
Program	No	The program for which the price information applies. If program is not specified, the price information applies to all programs.
Manufacturing Site	No	The site where the item is being manufactured. The price information applies only to the item manufactured at that site.
Authorized Suppliers	Yes	The suppliers that are authorized to view/read this price.
Part EOL Date	Yes	The end of life date of the item.

Field	Editable?	Description
Min	Yes	The minimum quantity for which the price information applies.
Mult	Yes	Indicates that the packaging delivers the item in multiple units; this value states how many are in each package.
NCNR	Yes	The Non Cancelable Non Returnable flag for the item.
Inventory	Yes	The available inventory.
Version Release Date	No	The date the price was released.
Effectivity Date	No	The date the price information comes into effect.
Contract Number	No	The number of the associated contract.
Flex fields	Yes/No	The other flex fields that are visible only if defined by your system administrator.

To edit the information, click the Edit button.

Changes Tab

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

- **Pending Changes** Table

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

- **Changes History** Table

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

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

> **Note:** Although its name is similar, the History tab shows actions taken on a price, while the tables on the Changes tab list released and pending changes for the price.

Price Lines Tab

A Price is an object where you record the price and terms conditions of items and manufacturer parts with relation to the supplier, customer, program, and manufacturing site. 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.

The Price Lines tab includes the following fields:

Required Fields	Description
Price Effective From Date	The date the price takes effect.
Currency Code	The unique identification code for the currency.
Ship From	The place the item/manufacturer part is shipped from.

Optional Fields	Description
Ship To	The place the item/manufacturer part will be shipped to.
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. This field must be filled if the price is set to allow quantity breaks.
Conversion Date	The currency conversion date.
Conversion Rate	The rate at which the currency is normalized to the project currency.
Material Price	The per unit material cost of the item/manufacturer part.
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/manufacturer part.
Transportation Terms	The terms and conditions for transporting the item/manufacturer parts.
Country of Origin	The country where the item/manufacturer part is manufactured.
PriceLine Notes	Any specific information about the price line.
Total Price	The total price is the sum of Total Material Price and Total Non Material Price. Note: The total prices are calculated prices and are not user-editable.
Total Material Price	The total material price of the item/manufacturer part.
Total Non Material Price	The cost of the item/manufacturer part not associated with materials, for example, labor rate, sales tax, and other overhead costs.
Project Number	The unique identification number of the project, if the price line is associated with the project. This field gets automatically populated if the price was published from a sourcing project.

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

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

Consider the following example:

A buyer tries to create and save the following price lines. The price lines have overlapping effectivity periods.

Field	Price Line 1	Price Line 2
Ship To	Mumbai	Mumbai

Field	Price Line 1	Price Line 2
Price Effective From Date	1st April 2009	5th April 2009
Price Effective To Date	30th April 2009	25th April 2009
Currency	INR	INR
Qty	2	2
Material Price	10	9

In the previous scenario, the system allows the user to save the price lines only if the Smart Rule, Overlap Price Line Effectivity Periods, is set to allow or warning.

Additionally, it is important to remember that duplicate price lines are not allowed. For example, if a buyer tries to create and save the following price lines, the save will fail.

Field	Price Line 1	Price Line 2
Ship To	Mumbai	Mumbai
Price Effective From Date	5th April 2009	5th April 2009
Price Effective To Date	30th April 2009	30th April 2009
Currency	INR	INR
Qty	2	2
Material Price	10	9

In this case, since all of the required fields are the duplicated in both price lines, the save does not succeed even though the values for Material Price differ.

Adding Price Lines

You can add a price line if the price object is in the Preliminary lifecycle phase. If the price is associated with a PCO, you can add price lines through redline mode (if the PCO has not been released) or through a new PCO (if the PCO has been released).

To add a price line, click **Add** on the Price Lines tab to display the *Add Price Line* dialog. Enter the price and terms information as required in the dialog. Although Ship-To, Price Effective From Date, and Currency Code are the only fields indicated as required, other fields such as Material Price and Qty (Quantity) are crucial to price lines, as well. Quantity, for example, must be filled if the price is set to allow quantity breaks. Once you are done filling in the price line information, click **Finish** to save the price line.

Removing Price Lines

You can remove a price line if the price object is in the Preliminary lifecycle phase. If the price is associated with a PCO, you can remove price lines through redline mode (if the PCO has not been released) or through a new PCO (if the PCO has been released).

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

Editing Price Lines

You can edit a price line if the price object is in the Preliminary lifecycle phase. If the price is associated with a PCO, you can modify price lines through redline mode (if the PCO has not been released) or through a new PCO (if the PCO has been released).

To edit a price line, click in field you want to edit and make changes, as needed. Some fields may not be editable.

Note: For the first field you attempt to edit, you will have to double-click in it to make it editable. Any subsequent fields will only require a single-click to enable editing.

While editing, you can edit multiple lines simultaneously by using the Fill-up and Fill-down options through the **More** button. For example, if you changed the **Effective Date** field for one price line, but wanted the same date for a few price lines below it, you can select the Effective Date cell for the price line that should be copied and the Effective Date cells of the price lines to which you want the value copied. When you click **More > Fill-down (selected cells)** the value that was in the first price line that you selected is copied to the selected cells below it. You could also use the Copy and Paste options through the More menu. There are also keyboard shortcuts available for these editing options.

Price Lifecycle Phases

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

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

Tab name	Tab information includes
Cover Page	General information about the PCO plus any unique fields defined by the Agile administrator. See "Cover Page Tab" on page 5-10.
Affected Prices	Prices that are affected by the PCO. PCOs include redlined price lines, and file folders (attachments). See "Affected Prices Tab" on page 5-12.

Tab name	Tab information includes
Workflow	Approvers, observers, and acknowledgers of the PCO and the results of their reviewing the PCO.
	For more information about working with routable objects and workflows, see the chapter about routing objects with workflows in *Getting Started with Agile PLM.*
Relationships	Objects that affect the status of the PCO and lists objects whose status is affected by the PCO.
	For more information about relationships, see the section about relationships and references between objects in *Getting Started with Agile PLM.*
Attachments	References to attached files and URLs contained in file folder objects.
	For more information about file folders and attachments, see the chapter about working with file folder objects and attachment files in *Getting Started with Agile PLM.*
History	All actions taken on the change.

> **Note:** You can personalize the view on some Price Change Order object tabs. To learn more about the personalization features, see "Personalizing PCM Object Tabs" on page 1-4.

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 New** menu on the main menu bar

- From the **Actions** menu on the Price page

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

To create a PCO from the Create New menu:

1. Click **Create New** > **Changes** > **Price Change Orders**. The *Create New Price Change Orders* dialog appears.

2. Select PCO **Type** from its dropdown list.

3. Depending on how the Agile administrator has set up PCO numbering, a unique number may automatically be generated and inserted in the **Number** field. You may also be able to click the Autonumber icon to get another system-generated number or you can enter your own number.

4. Click **Save**. The cover page of the newly created PCO appears.

> **Note:** Fields are visible, or editable, or both, based on how the buyer set up privileges for the supplier.

5. Select a category from the **Change Category** dropdown list.

6. Enter the **Description of Change** and the R**eason for Change** in the corresponding fields.

7. Select a **Reason Code**, **Workflow**, and **Price Admin** from the corresponding dropdown lists.

8. Click the Address Book icon next to the **Originator**. It opens a search palette to find and select an originator from the list of users. By default, the originator is the user who creates the PCO.

9. Change the **Date Originated** from the calendar to stamp the date of origination of the PCO, if it is different from today's date.

10. Click the list icon next to the Product Lines to select the affected product lines.

11. Click **Save**. The updated cover page appears.

    Add affected prices or attachments to the PCO by clicking on the corresponding tabs.

To create a PCO from a Price object:

1. Open a **Price** object.

2. Choose **Actions** > **Add to Change** > **Create New**. The *Create Changes* dialog appears.

3. Select a PCO from the Change **Type** dropdown list.

4. Depending on how the Agile administrator has set up PCO numbering, a unique number may automatically be generated and inserted in the **Number** field. You may also be able to click the AutoNumber icon to get another system-generated number or you can enter your own number.

5. Click **Save**.

6. To add details to the newly created PCO, follow *steps 4 through 11* from the procedure *To create a PCO from the Create New* menu.

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

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

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

Adding the Current Price Object to an Existing PCO

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

1. Open a price.

2. Click Actions > Add to Change > Search. The search palette appears.

3. Search for and select the PCO, to which you want to add the price, by double-clicking its row.

If the price was successfully added, the PCO page appears. The price object is listed in the **Affected Prices** tab of the PCO. If the price was not successfully added to the PCO, however, an error message appears in the information bar.

> **Note:**   You can also add prices to a PCO directly from within the Affected Prices tab of the PCO. For more information, see "Adding Prices" on page 5-13.

Cover Page Tab

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

Buttons on the Cover Page Tab

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

- **Edit** - appears when the Cover Page is not in edit mode. To edit the Cover Page, click Edit.

- **Save** - appears when the Cover Page is in edit mode. To save the changes that you made to the tab while it was in edit mode, click Save.

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

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

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

- The change has been released.

- You do not have sufficient privileges or the appropriate license to modify that field.

Fields on the Cover Page Tab

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

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

Field	How completed	Contents
Number	Automatically, when created.	The number assigned to the change when you create it.
Status	Automatically, when created; updated as the change moves through the assigned workflow.	Change status, described in the section "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.	A meaningful description of the PCO.

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

Status on the Cover Page Tab

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

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

Status stamp name	Status definition
Unassigned (no status type)	No workflow has been assigned to this change. The originator may still be developing the change. No statuses are displayed on the Workflow tab.
Pending (Pending status type)	The originator may still be developing the change. It has not yet been submitted to the price administrator.
Submitted (Submit status type)	The change has been routed to the price administrator for review and analysis.
CCB (Review status type)	The change has been routed to the members of the Change Control Board (CCB) for approval.
Released (Released status type)	The change has been signed off by the CCB members and released.
Implemented (Complete status type)	The PCO has been implemented or incorporated into new drawings.
Hold (Hold status type)	The change has been placed on hold while information is being gathered by the price administrator.
Canceled (Cancel status type)	The change has been 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 5-15.)

Affected Prices Tab

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

- **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 Version** - the revision (of the affected price) that will be created when the change is released. This field is automatically populated.

- **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).

- **Has been Redlined** - indicates that there are redlines on the price line for that item.

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

- Customer - the customer to whom this price applies. If there is a customer assigned to the price, the price is available only for that customer and not for other customers.

- Program - the program associated with this price object. "All" is a valid entry. A program, for example, could be 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 simultaneously.

- 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 Affected Prices tab:

1. In the **Affected Prices** tab, click **Add**. A new row in the *Affected Prices* table appears.

2. If known, type in the price number, otherwise you can click the Search to Add icon to search for an existing price. The search palette appears.

> **Note:** Alternatively, you can click the Create New button to create a price.

3. From the search results, select the PCO you want to add by double-clicking the row.

   If the price cannot be added, an error message appears.

4. Close the search palette. The newly added price appears in the Affected Prices table.

Auto-populating Effective Date

A price change order modifies the price of an item or manufacturer part. The affected price, however, does not come into effect until an Effective Date is defined. You can set

this date either by editing prices selectively or by populating a common date to many price objects.

To Auto Populate an Effective Date:

1. In the **Affected Prices** tab, select the row(s) of price(s) that you want to make effective from a desired date.

2. Click **Auto Populate Effective Date** button. The *Auto Populate Effective Date* dialog appears.

3. Click the calendar button next to **Enter a Date** field and select a date.

4. Click **Set Date**.

5. Select **Apply to All Items** check box if you want to set the date to all the prices in Affected Prices tab.

Removing Prices

To remove a price from the Affected Prices table:

1. On the **Affected Price**s tab, select the row(s) of the price(s) you want to remove.

2. Click **Remove**. (Alternatively, you can press the Delete button on your keyboard.)

Editing Prices

You can edit a price on the Affected Prices tab of a PCO. To edit a price, click directly in an editable field to make necessary changes. Not all fields are editable.

> **Note:** For the first field you attempt to edit, you will have to double-click in it to make it editable. Any subsequent fields will only require a single-click to enable editing.

Creating and Editing Price Redlines

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

To open the Price List Redline tab:

1. On the **Affected Prices** tab, click the row of the price that you want to redline. The **Price List Redline** sub-tab showing existing redlines for the selected price appears below.

2. To add price lines to the price, click Add. The *Add Price Line* dialog appears. For details, see "Adding Prices" on page 5-13.

3. To edit an existing price line, click directly in the editable field and make changes, as necessary.

    Editing, deleting, and undoing redlines affects only the selected rows of prices on the Price Lines tab.

> **Note:** You must have the required privileges to redline prices.

The Price List Redline tab has the following buttons:

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

- **Remove** - redline-remove the selected price line from the price.

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

- **More** - allows you more edit options, including copy/paste and fill-up/fill-down.

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

The **Workflow** tab can have the following two sections:

- Summary Section
- Workflow Table

Summary Section

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

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

The status with an orange background is the current status.

Workflow Table

The Workflow table on the **Workflow** tab lists past workflow(s) and signoff information for the change. Although the Agile administrator may have modified the table, it has the following columns by default:

- **Status Code** - an image that indicates the status or the action that was taken, for example, current, forward, backward, and so on.

- **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, observer or acknowledger, and it can be a single user or a user group.

- **Req'd** - whether the reviewer is a required reviewer (approver) or not (observer).

- **Action** - the action taken by the reviewer.

- **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, observers, and acknowledgers) during signoff.

- **Signoff Duration** - the time taken to get the signoff.

The ability to use the **Add Reviewers** and **Remove Reviewers** buttons is controlled by the settings in each workflow. In addition, you must have the appropriate privileges to add or remove approvers, observers, or acknowledgers. 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.

Glossary

ACP

See **Agile Configuration Propagation (ACP)**

Activity

A project activity in Agile Product Portfolio Management, such as a program, task, or phase.

Affected Files

Similar to Affected Items, these objects are EC files that are Design Release Candidates.

Agile Configuration Propagation (ACP)

Propagating existing configuration the PLM to the newly installed version of PLM.

ACS

See **Agile Content Service (ACS)**

Agile Content Service (ACS)

ACS is an event-driven XML-based publishing service that makes the product record available to a wide variety of business applications and users, internally and across the global manufacturing network

Agile Destination

A package created by an Agile PLM system in the target PLM using Web Services to import from the Attachments tab of the package in the target system.

Agile Integration Services (AIS)

A collection of predefined Web Services in the Agile Integration Framework that enable communication between the Agile Application Server and disparate systems

Agile Product Portfolio Management

The Agile PLM project management solution that is integrated with the product information in PLM.

AI

Affected Items tab on Change objects in Agile.

AIS

See **Agile Integration Services (AIS)**.

Approved Manufacturer Parts List (AML)

List of approved manufacturer parts associated with an item.

AML

See **Approved Manufacturer Parts List (AML)**.

API

See **Application programming interface (API)**.

Application programming interface (API)

A set of routines, protocols, and tools for building software applications. An API expresses a software component in terms of its operations, inputs, outputs, and underlying types.

Assembly

A product assembly lists the parts in a product and shows the substances and materials that comprise those parts. It is linked to specifications that can restrict how much of a particular substance that product assembly may contain

Automated transfer orders (ATO)

Content published by Agile PLM users in real time with a content transfer order (CTO) or set up subscribers to automatically create automated transfer orders (ATO) based on a schedule or triggered by a workflow status change.

Baseline

A snapshot of a project, usually in its initial stage, used as a reference for future comparison in Agile Product Portfolio Management.

Bill of Material (BOM)

A hierarchical representation of a product that is made up of other products.

Bill of Substances (BOS)

A hierarchical list of substances that are contained in the parts and assemblies that make up a BOM.

BOM

See **Bill of Material (BOM)**.

BOS

See **Bill of Substances (BOS)**.

CAD

See **Computer-aided design (CAD)**

Commodity

A class of goods that is in demand, that is supplied without qualitative differentiation regardless of supplier.

Computer-aided design (CAD)

The use of computer systems to assist in the creation, modification, analysis, or optimization of a design. CAD software is used to increase the productivity of the designer, improve the quality of design, improve communications through

documentation, and to create a database for manufacturing. CAD output is often in the form of electronic files for print, machining, or other manufacturing operations.

Contract (Price)

This is a subclass of the Published Prices class. Contract prices are prices provided by the supplier for a specific item or manufacturer part. This price information applies only for the specified duration and can apply to any project.

Co-Sourcing

The process of leveraging product cost across suppliers.

DCO

See **Design Change Order (DCO)**

Deliverable

A unit of work required for a project's success, usually fulfilled by generating a digital file. (Word processing documents, spreadsheet documents, PDFs, presentation documents, and so on.) Deliverables can also be Agile PLM objects and processes. Also called 'content' in Agile Product Portfolio Management.

Design Change Order (DCO)

A Change Order subclass that is available when the effected File Tab is enabled and provides access to all Agile PLM Workflow functions.

Design File Folder

An EC file folder that is integrated with CAD and PLM files, providing full access to PLM Workflow function.

EC

See **Engineering Collaboration (EC)**

EC Client

A Java-based UI to access, administer and operated the EC solution.

ECO

See **Engineering Change Order (ECO)**

Engineering Change Order (ECO)

An object that carries with it all the proposed changes to a product and/or its BOM. When approved and implemented, the proposed changes become effective.

Engineering Collaboration (EC)

An application that provides data and process integration between CAD applications and Agile PLM. It allows CAD designers and engineers to capture and control the data representing a primary source of the product record.

Extensible Markup Language (XML)

A markup language that defines a set of rules for encoding documents in a format that is both human-readable and machine-readable

File Manager

The File Manager manages files in a repository or vault in the file system and provides a place to store and retrieve files locally or remotely. You can install it on the same

server as the Agile Application Server or on a separate one. You can also install the File in a redundant configuration and/or distributed across geographic regions.

File Transfer Protocol (FTP)

A standard network protocol used to transfer computer files from one host to another host over a TCP-based network, such as the Internet.

FQPN

See **Fully qualified path name (FQPN)**.

FTP

See **File Transfer Protocol (FTP)**

Fully qualified file name

The exact name of a file on a computer that is completely specified such that it is unambiguous and cannot be mistaken for any other file on that system.

Fully qualified path name (FQPN)

The full path of a resource, directory or file, stored in a computer. It is composed by the full path to the resource and its syntax depends on the operating system.

Gantt Chart

A project management tool that shows project activities and schedule as a bar chart. The chart lists project activities in sequence, and presents critical information such as the start and end dates of each activity, as well as interdependencies between activities.

Item Master

The product record. It is the entire collection of Items - Parts, Documents, and any other user-defined subclasses of the Items class maintained under change control in the Agile system.

Java Message Service (JMS)

The Java Message Service (JMS) API is a Java Message Oriented Middleware (MOM) API for sending messages between two or more clients.

JMS

See **Java Message Service (JMS)**.

Lifecycle Phase

Current state in an object's workflow.

LRR

Latest Released Rev - concerning a Part or Document.

NCNR

Non-Cancelable Non Returnable. Applies to an item. NCNR can be a Yes or No, depending on the supplier. You can ask for the NCNR information in the supplier response. This is one of the critical factors in finding the best deal among the supplier responses.

PDX

See **Product Definition eXchange (PDX)**.

PLM

See **Product Lifecycle Management (PLM)**.

Percent allocation or % allocation

The percentage of a resource's time allocated to a specific task or tasks in Agile Product Portfolio Management..

Percent complete or % complete

Amount of time and effort expended on a project measured as a percentage of the time and effort required to complete the whole project. Used in Agile Product Portfolio Management.

Product Definition eXchange (PDX)

A standard designed for the e-supply chain. This standard is based on the XML format because it provides a simple yet powerful and flexible way to encode structured data into a format that is both human- and computer-readable. In PLM, PDX packages contain product content, such as items.

Product Lifecycle Management (PLM)

The process of taking parts/documents from inception to production to phase-out, and all the stages in between.

Protocol

A system of digital rules or agreed-upon format for data exchange within or between devices. It determines the type of error checking and data compression used.

Published Price

This is a subclass of the Published Prices class. Published prices are prices provided by the suppliers in response to an RFQ and published from the project. The published price information can also be used in other projects.

PCO

See **Price Change Order**

Price

An object that carries with it all the proposed changes to a product and/or its BOM. It can be approved and implemented to make the proposed changes effective.

Price Change Order

It is an object that carries with it all the proposed changes to a price. It can be approved and implemented to make the proposed changes effective.

Quote history

A subclass of the Quote Histories class. Quote history prices are the stored prices from supplier responses that you can use. Any change in the response line of an RFQ is stored in the historical response and is usable at any time.

Request for Information (RFI)

A material declaration that lists the parts in a product assembly and shows the substances and materials contained in the part.

Request for Quote (RFQ)

A standard business process whose purpose is to invite suppliers into a bidding process to bid on specific products or services.

Request for Proposal (RFP)

A solicitation, often made through a bidding process, by an agency or company interested in procuring a commodity, service or valuable asset, to potential suppliers.

Response Line

A response line has information about only one item. The negotiation of price and terms for items is dealt with in a response line.

Resource Pool

A group of users who can be bulk assigned as resources for a particular project or task in Agile Product Portfolio Management.

RFI

See**Request for Information (RFI)**.

RFP

See **Request for Proposal (RFP)**

RFQ

See **Request for Quote (RFQ)**

RFQ Response

A medium of communication between the user and the supplier. One response from a supplier can contain multiple response lines for different items. Price data is added to the project automatically when the supplier submits the response.

Schedule Editor

The scheduling engine that handles updates to the project schedule in Agile Product Portfolio Management.

Schema

In computer programming, a schema is the organization or structure for a database. The activity of data modeling leads to a schema.

SDK

See **Software Development Kit (SDK or "devkit")**

Software Development Kit (SDK or "devkit")

A set of software development tools that allows the creation of applications for a certain software package, software framework, hardware platform, computer system, video game console, operating system, or similar development platform.

Sourcing Project

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

Standard Cost

Applies to an item. This is the market cost of the item. It is site-specific. The standard cost is for a unit.

Supplier

A supplier of one or several commodities.

Target Cost

Applies to item. This is the expected cost of the item by you or the supplier. This can be a percentage of the standard cost. Target cost is for a unit.

Timesheet

The time entry system in Agile Product Portfolio Management, used to track actual hours spent by resources on project activities and to calculate corresponding labor cost.

TLA

See**Top Level Assembly (TLA)**

Top Level Assembly (TLA)

The level in a BOM that indicates the ultimate product being manufactured.

Transfer order

Every time Agile Content Service (ACS) publishes product content, it produces a transfer order that keeps track of what, where, and when product content is transferred.

UPK

See **User Productivity Kit (UPK)**

User Productivity Kit (UPK)

The Oracle online help system used in some Oracle products.

Web Service Extensions (WSX)

A Web service engine that enables communication between Agile Product Lifecycle Management system and disparate internal and external systems.

WSX

See **Web Service Extensions (WSX)**.

XML

See **Extensible Markup Language (XML)**.

XML Schema

Description of a type of XML document, typically expressed in terms of constraints on the structure and content of documents of that type, above and beyond the basic syntactical constraints imposed by XML rules.

XML Schema

Glossary-8