



# RFQ Handling Use Cases

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## RFQ01 RFQ creation

<b>Purpose</b>	RFQ process is the first phase in PDPLS process. Target is to capture all the customer requirements	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	Sales Manager receives customer specification/requirements		
<b>Interactions</b>	The Sales Manager creates the RFQ object and environment		
<b>End</b>	The RFQ is created		
<b>Constraints</b>	None		

A Sales Manager receives from a Customer a document (specification document) with a request to respond. The Sales Manager will create an RFQ process and relate the specification to RFQ

### Step 1 Open the RFQ dashboard

The screenshot shows the 3DEXPERIENCE interface. In the left sidebar, under 'Collaboration and Approvals', the 'Home RFQ User' link is highlighted with a blue circle. The main content area displays the 'RFQs' dashboard with a table of Request for Quotations. The table has the following columns: Name, Description, Status, Issue Date, Owner, Due Date, Customer Name, and Customer. The first few rows of the table are:

Name	Description	Status	Issue Date	Owner	Due Date	Customer Name	Customer
RFQ000015-01	test new quotation	RFQ	Jan 8, 2016	Test ...	Jan 29...		
RFQ000013-01	window lifter for JLR X152	RFQ	Dec 3, 2...	Tony...	Dec 3...	Jaguar Land ...	
RFQ000012-01	testing	RFQ	Dec 3, 2...	Test ...	Dec 1...		

### Step 2 Click the command "Create RFQ"

This screenshot is identical to the one in Step 1, but the 'Create RFQ' button in the top toolbar is circled in blue. The button is located next to the 'Revise RFQ' button. The rest of the interface, including the sidebar and the RFQ table, remains the same.

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Step 3 Fill in the mandatory information (in italic red) and additional relevant information into “Create RFQ” page and click Done

Create RFQ

*Fields in red italics are required*

Type Request for Quotation

*AutoName Series* RFQ Number

Policy Request for Quotation

*Brief Description*

Business Unit

Visibility Members

*Due Date*

Default Task Constraint As Soon As Possible

**Done** Cancel

The new RFQ will be generated and the interface will be shown.  
Then the Sales Manager can update the other RFQ info.

Step 4 Click the Edit Details command and fill in the other information

**Edit Details**

Issue Date	Nov 26, 2015	Due Date	Dec 10, 2015	Validity Days	30
Customer Name	FCA	Customer Documentation Reference	<a href="#">X152-EPB-ROOF-SPEC-v1.2 18-01-11.doc</a>		
Program/Platform #	X152	Vehicle Model Year		Requested By	Kevin Borg
Customer Part #	FCA.555	Part Description	Switches for door and window lifter		
Current Price	0.0 Dollar	Target Price	0.0 Dollar	Market Price	0.0 Dollar
Quotation Currency	Euro	Quotation Description	New quotation for switch Alfa		
Quote Type	New Program	Quote Level	Engineering Estimate		
Program Lifetime	5	Start of Production	Nov 1, 2017		

Only Quotation Description and Due Date are mandatory, even if Program Lifetime and Start of Production date are used for volume estimation process.

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## Step 5 Click Done in order to save changes

Request for Quotation RFQ000015-01 rev 211452267616618: Properties

*Fields in red italics are required*

**Details**

Issue Date	Jan 8, 2016	Due Date	Jan 29, 2016	Validity Days	30
Customer Name		Customer Documentation Reference			
Program/Platform #		Vehicle Model Year		Requested By	Test Everything
Customer Part #		Part Description			
Current Price	0.0	Target Price	0.0	Market Price	0.0
Quotation Currency	Euro	<i>Quotation Description</i>	test new quotation		
Quote Type		Quote Level		Functional Safety	FALSE
Program Lifetime	0	Start of Production		Delivery Terms	

**Done** **Cancel**

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## RFQ02 Customer specification and documents upload

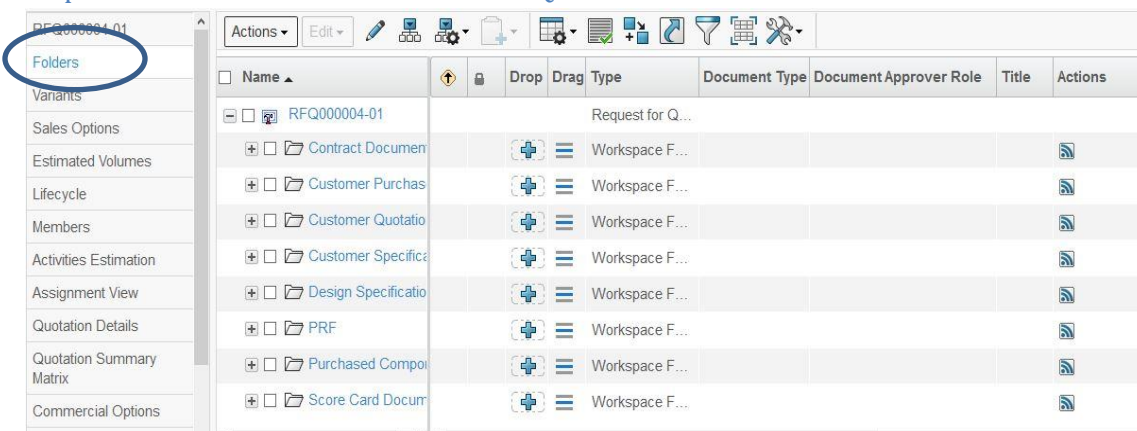
<b>Purpose</b>	Upload customer specification input into PLM	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Customer provides specification documents. Sales Manager has to be upload documents in a folder "Customer Specification"		
<b>End</b>	RFQ is related to customer specification		
<b>Constraints</b>			

A set of predefined folders is generated during RFQ creation.

Sales Manager can upload customer specification in appropriate folder using drag-and-drop functionality.

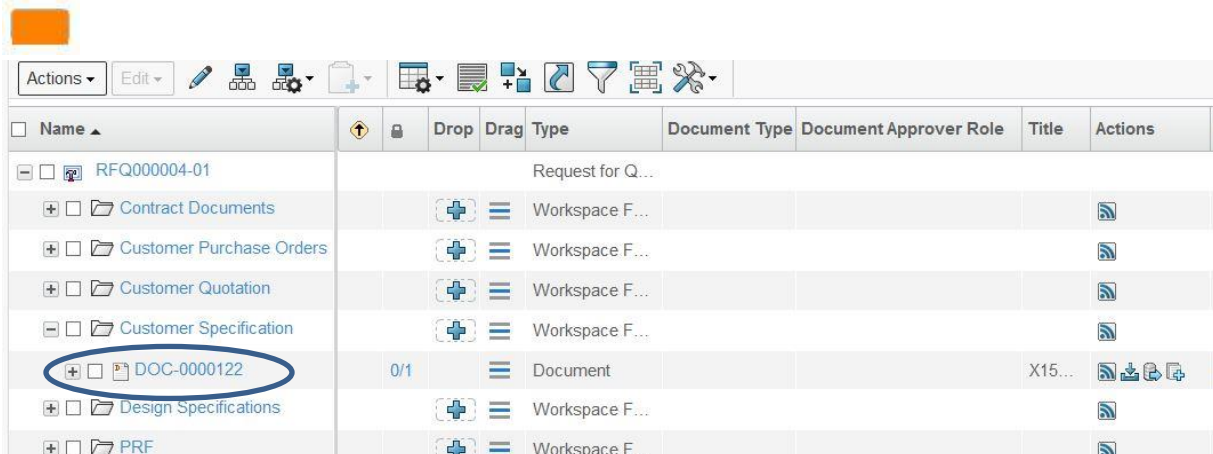
The generated document can be classified using a drop-down list of predefined value.

### Step 1 Select Folders command from RFQ interface



### Add Document using Drag and Drop

Step 2a Select the file from the file system and drop it with the mouse over the  icon related to the specific folder. Then release the mouse in order to start the document encoding. The icon becomes orange

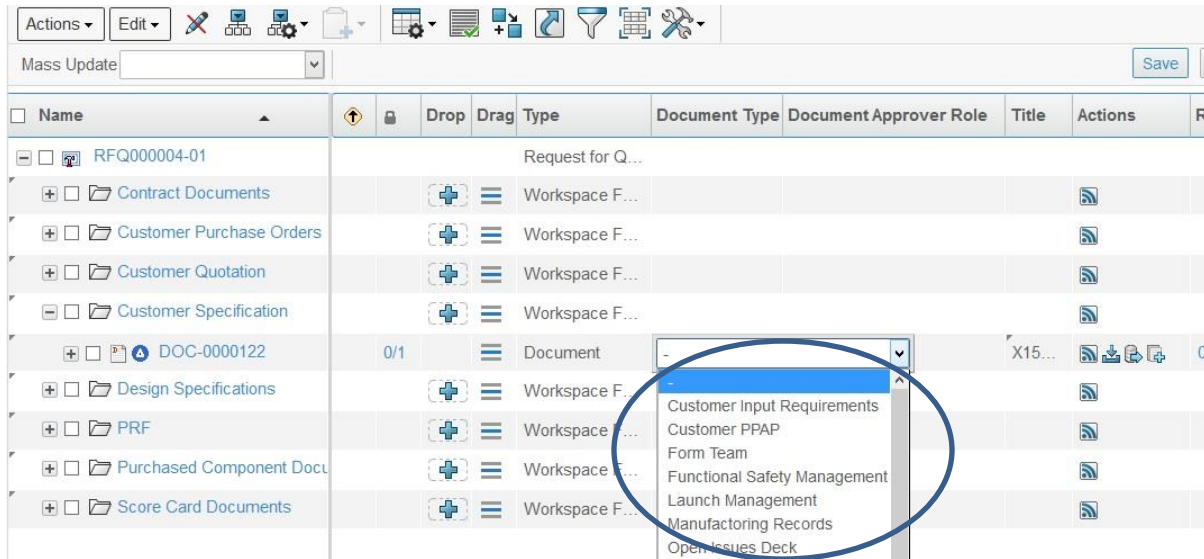


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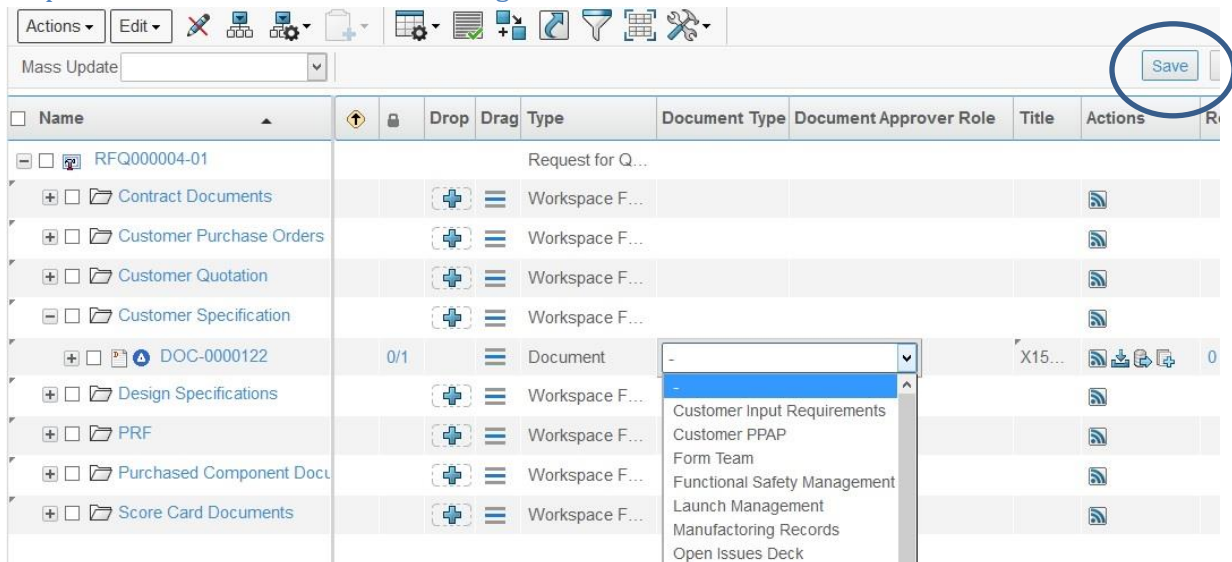
Step 3a Click the Edit icon to enable the Edit View



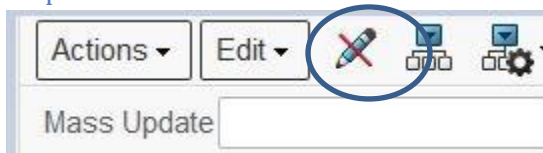
Step 4a Select a document type from the combo



Step 5a Click Save in order to save changes



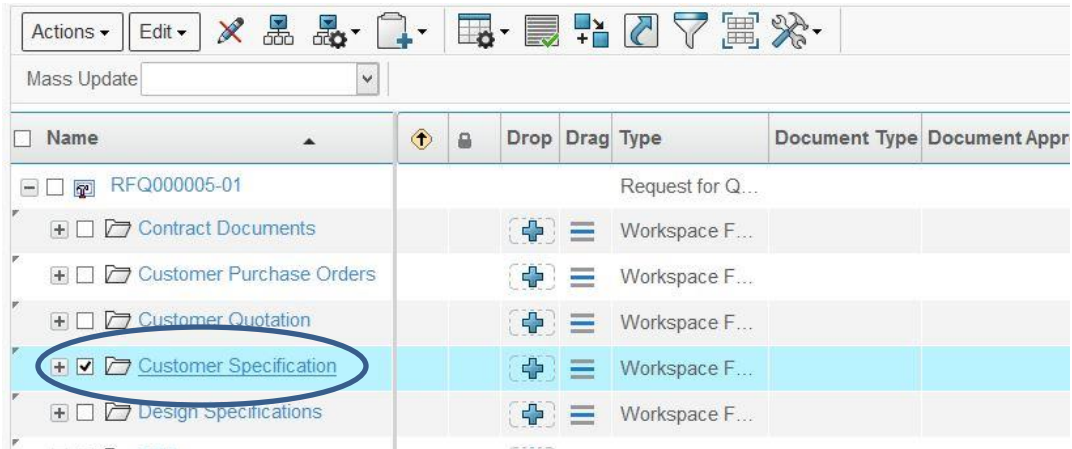
Step 6a Click the Edit icon to disable the Edit View



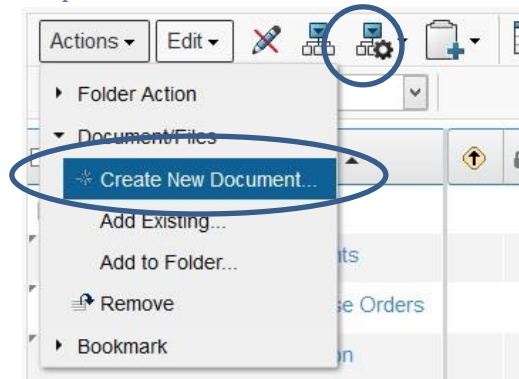
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## Add Document using Create New Document functionality

Step 2b Select the Folder the document has to be added to



Step 3b Click Create New Document command from Actions menu



The Specify Details page will be shown

Step 1 of 2: Specify Details

*Fields in red italics are required.*

Name	<input type="text"/>	<input checked="" type="checkbox"/> AutoName
Type	<input type="text" value="Document"/>	<input data-bbox="548 1402 568 1428" type="button" value="..."/>
Policy	<input type="text" value="Document Release"/>	<input data-bbox="516 1444 535 1470" type="button" value="v"/>
Title	<input type="text"/>	
Description	<input type="text"/>	
Access Type	<input type="text" value="Inherited"/>	<input data-bbox="435 1633 454 1659" type="button" value="v"/>
Document Approver Role	<input type="text"/>	<input data-bbox="727 1680 747 1705" type="button" value="v"/>
Document Type	<input type="text"/>	<input data-bbox="597 1726 617 1751" type="button" value="v"/>

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Step 4b Fill in the Title, Description and the Document Type and click Next

Step 1 of 2: Specify Details

*Fields in red italics are required.*

**Name**  ☒ AutoName

**Type**  ..

**Policy**  ▾

**Title**

**Description**

**Access Type**  ▾

**Document Approver Role**

**Document Type**  ▾

The Upload Files page will be shown

Step 2 of 2: Upload Files

**File | Format** **Comments**

No file selected.  
 ▾

No file selected.  
 ▾

No file selected.  
 ▾

No file selected.  
 ▾

Step 5b Click Browse command and select the file to be uploaded from the file system

**File | Format**

No file selected.  
 ▾

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The file name will be shown into the page

Step 6b Click Done to finalized the Document generation

Step 2 of 2: Upload Files

The Document will be generated and added under the selected Folder

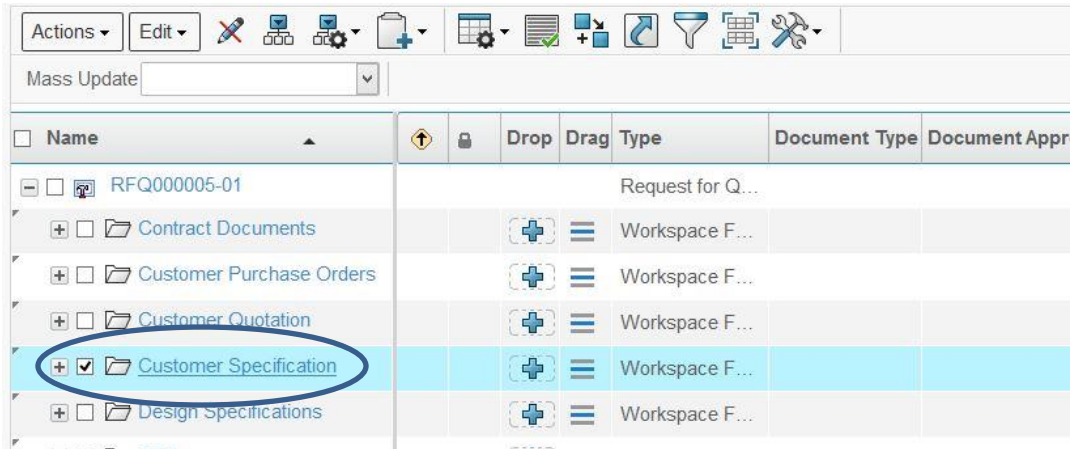
<div> <div>Actions</div> <div>Edit</div> <div> </div> </div> <div>Mass Update <span></span></div> <div>Save</div>									
<input type="checkbox"/> Name			Drop	Drag	Type	Document Type	Document Approver Role	Title	Actions
<input type="checkbox"/> RFQ000005-01					Request for Q...				
<input type="checkbox"/> Contract Documents					Workspace F...				
<input type="checkbox"/> Customer Purchase Orders					Workspace F...				
<input type="checkbox"/> Customer Quotation					Workspace F...				
<input checked="" type="checkbox"/> Customer Specification					Workspace F...				
<input type="checkbox"/> DOC-0000131			0/1		Document			X15...	
<input checked="" type="checkbox"/> DOC-0000206			0/1		Document	Customer Input Re...		Cust...	

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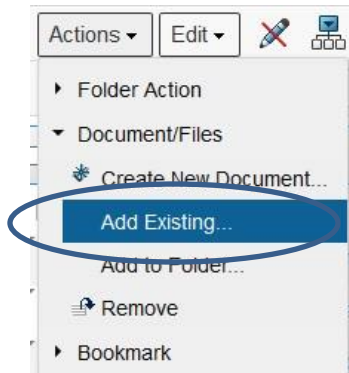


## Add Document using Add Existing functionality

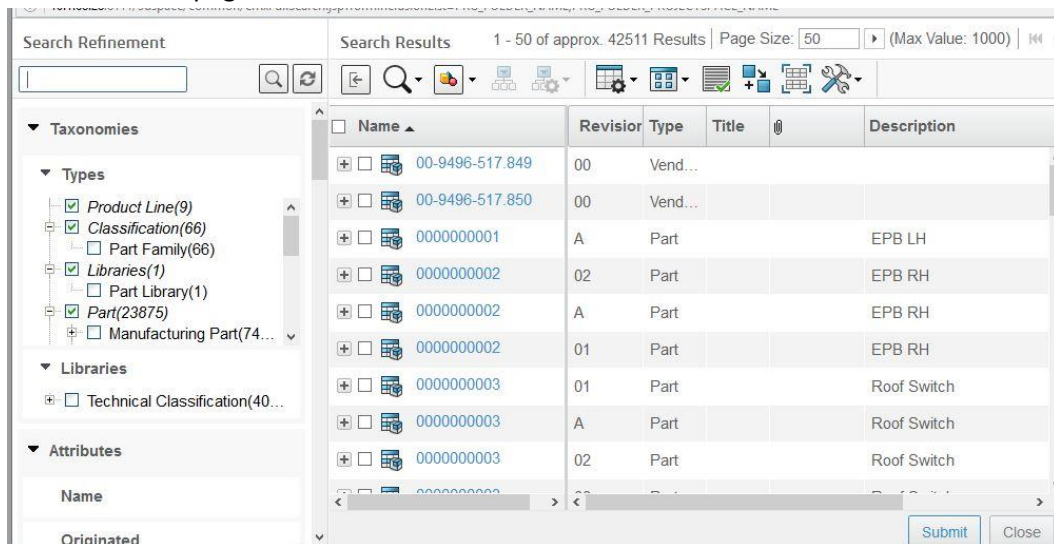
Step 2c Select the Folder the document has to be added to



Step 3c Click Add Existing command from Actions menu



The Full Search page will be shown



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Step 4c Refine the search criteria to find the Document that is need and click the  icon

Search Refinement

customer\*

Search Results

51 - 77 of approx. 77 Results | Page Size: 50 | (Max Value: 1000)

Name	Revisor	Type	Title	Description	State	Owner	Snippets
DOC-0000162	0	Doc...	test 2		In W...	Stan...	
DOC-0000175	0	Doc...	MEM...		In W...	Test ...	... Cust...
DOC-0000196	0	Doc...	PLM...		In W...	Kevi...	... Cust...
DOC-0000206	0	Doc...	Cust...	Customer Requirements	In W...	Kevi...	... Cust... ... ELEC
DOC-0000207	0	Doc...	Cust...	Customer Standards	In W...	Kevi...	... Cust... ... ELEC
Old Customer Spec	0	Doc...	Cust...	Customer Specification	In W...	Kevi...	... Cust... ... 17-05

Submit Close

Step 5c Select the document to be added and click Submit command

Search Refinement

customer\*

Search Results













































51 - 77 of approx. 77 Results | Page Size: 50 | (Max Value: 1000)

Name	Revisor	Type	Title	Description	State	Owner	Snippets
DOC-0000162	0	Doc...	test 2		In W...	Stan...	
DOC-0000175	0	Doc...	MEM...		In W...	Test ...	... Cust...
DOC-0000196	0	Doc...	PLM...		In W...	Kevi...	... Cust...
DOC-0000206	0	Doc...	Cust...	Customer Requirements	In W...	Kevi...	... Cust... ... ELEC
<input checked="" type="checkbox"/> DOC-0000207	0	Doc...	Cust...	Customer Standards	In W...	Kevi...	... Cust... ... ELEC
Old Customer Spec	0	Doc...	Cust...	Customer Specification	In W...	Kevi...	... Cust... ... 17-05

Submit Close

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The Document will be added to the selected Folder

Actions ▾ Edit ▾          							
<input type="checkbox"/> Name ▲	 	Drop	Drag	Type	Document Type	Document Approver I	Title
  RFQ000005-01				Request for Q...			
  Contract Document				Workspace F...			
  Customer Purchas				Workspace F...			
  Customer Quotation				Workspace F...			
   Customer Specifica				Workspace F...			
  DOC-0000131	0/1			Document			X152-EPB-ROOF-SPEC-v1.2...
  DOC-0000206	0/1			Document	Customer Input Requirements		Customer Requirements
  DOC-0000207	0/1			Document	Customer Input Requirements		Customer Standards
  Design Specificatio				Workspace F...			

### Step 7 Select RFQ Details (RFQ name) command from RFQ interface

The Documents uploaded into Customer Specification Folder will be shown through an hyperlink into RFQ details form

RFQ000005-01

Folders

Variants

Sales Options

Estimated Volumes

Lifecycle

Members

Activities Estimation

Assignment View

Details

Issue Date

Nov 26, 2015

Due Date

Dec 10, 2015

Validity Days

30

Customer Name

FCA

Customer Documentation Reference

Customer Requirements

Customer Standards

X152-EPB-ROOF-SPEC-v1.2 18-01-11.doc

Program/Platform #

X152

Vehicle Model Year

Requested By

Kevin Borg

Customer Part #

FCA.555

Part Description

Switches for door and window lifter

Current Price

0.0 Dollar

Target Price

0.0 Dollar

Market Price

0.0 Dollar

Quotation Currency

Euro

Quotation Description

New quotation for switch Alfa

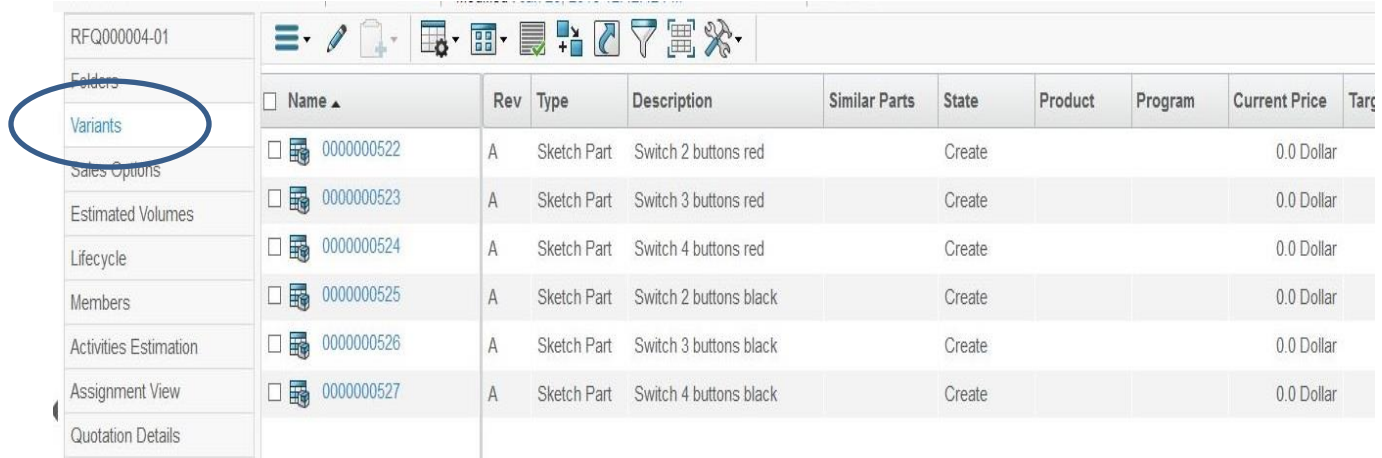
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## RFQ03 New variants definition

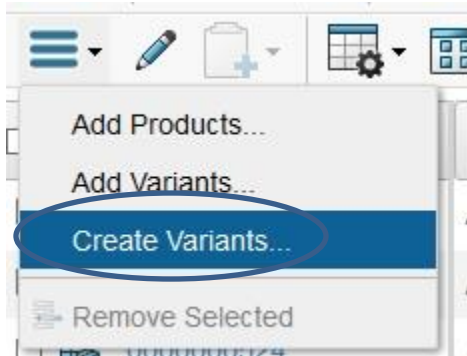
<b>Purpose</b>	Define Products/Variants in order to provide CBOMs and quotations	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	<p>During RFQ process, Quotation Manager has to provide manufacturing estimations related to the defined Products/Variants: The RFQ will manage one or more BOM Concepts.</p> <p>BOM Concept is the first version of product BOM, composed from new and/or existing components; new components needs to be defined with technical information (description, weights, raw material, plating, ...) and cost information (prototype and estimated costs, material costs, ...).</p>		
<b>End</b>	RFQ contain Products/Variants related to Customer requests		
<b>Constraints</b>			

In case of new business or request for information, the Sales Manager has to define new variants to contain quotation and information.

### Step 1 Select Variants command from RFQ interface



### Step 2 Select "Create Variants" command from the Action menu



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Step 3 Fill in the number of variant to be created and and click Done

RFQ000005-01|Create Part |

*Fields in red italics are required*

Type: Part Policy: Sketch Part

AutoName Series: Part Number Number of Parts: 3

Done Cancel

The new variants will be generated and shown as list into the interface

Name	Rev	Type	Description	Similar Parts	S
0000000552	A	Sketch...			F
0000000553	A	Sketch...			C
0000000554	A	Sketch...			C

Step 4 Click the Edit icon to enable the Edit View



Step 5 Fill in the description and the other price info

Name	Rev	Type	Description	Similar Parts	State	Product	Program	Current Price	Target Price	Mark
0000000522	A	Sketch ...	Switch 2 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000523	A	Sketch ...	Switch 3 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000524	A	Sketch ...	Switch 4 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000525	A	Sketch ...	Switch 2 buttons black		Create			0.0 Dollar	0.0 Dollar	
0000000526	A	Sketch ...	Switch 3 buttons black		Create			0.0 Dollar	0.0 Dollar	
0000000527	A	Sketch ...	Switch 4 buttons black		Create			0.0 Dollar	0.0 Dollar	

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Step 6 Click Done in order to save changes

Mass Update 

Save

Reset

Name	Rev	Type	Description	Similar Parts	State	Product	Program	Current Price	Target Price	Mark
0000000522	A	Sketch ...	Switch 2 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000523	A	Sketch ...	Switch 3 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000524	A	Sketch ...	Switch 4 buttons red		Create			0.0 Dollar	0.0 Dollar	
0000000525	A	Sketch ...	Switch 2 buttons black		Create			0.0 Dollar	0.0 Dollar	
0000000526	A	Sketch ...	Switch 3 buttons black		Create			0.0 Dollar	0.0 Dollar	
0000000527	A	Sketch ...	Switch 4 buttons black		Create			0.0 Dollar	0.0 Dollar	

Step 7 Click the Edit icon to disable the Edit View



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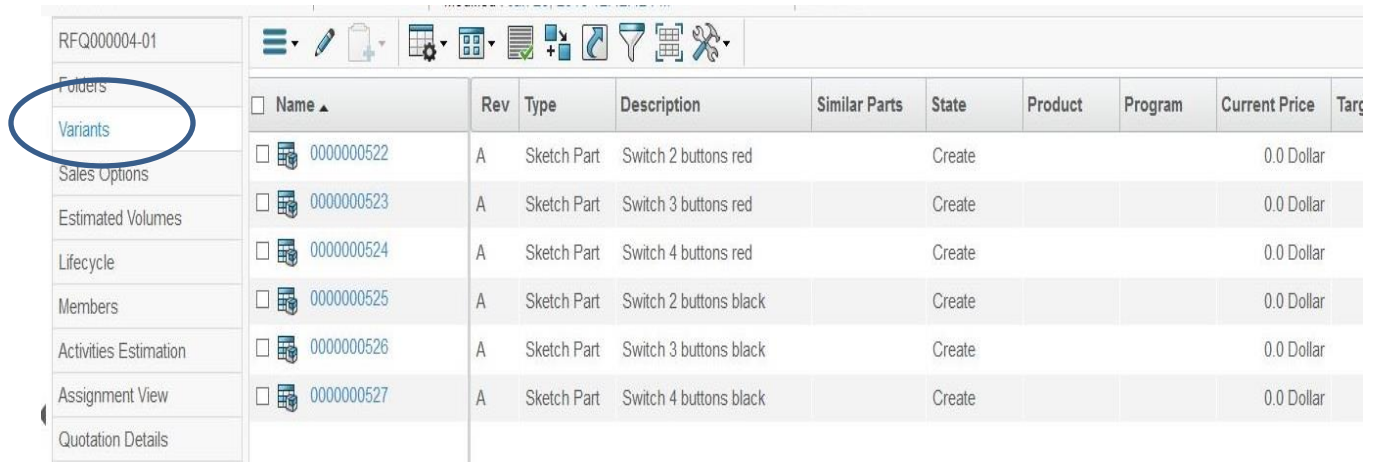


## RFQ04 Remove variants definition

<b>Purpose</b>	Remove Products/Variants in order to provide CBOMs and quotations	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ in state RFQ Opportunity or RFQ		
<b>Interactions</b>	<p>During the RFQ process, Sales Manager needs to define the amount of variants that need to be quoted.</p> <p>In RFQ initial state, Sales Manager creates sales options and variants, without a complete Bill of Material.</p> <p>During “Concept BOM” state, Design Engineer can define CBOM contents; can also create several CBOMs and link them to different Sales Options.</p> <p>During a revision of an existing RFQ, Sales can add or remove variants</p>		
<b>End</b>	RFQ contain Products/Variants related to Customer requests		
<b>Constraints</b>			

During a revision of an existing RFQ, the Sales Manager can decide to remove variants no longer required

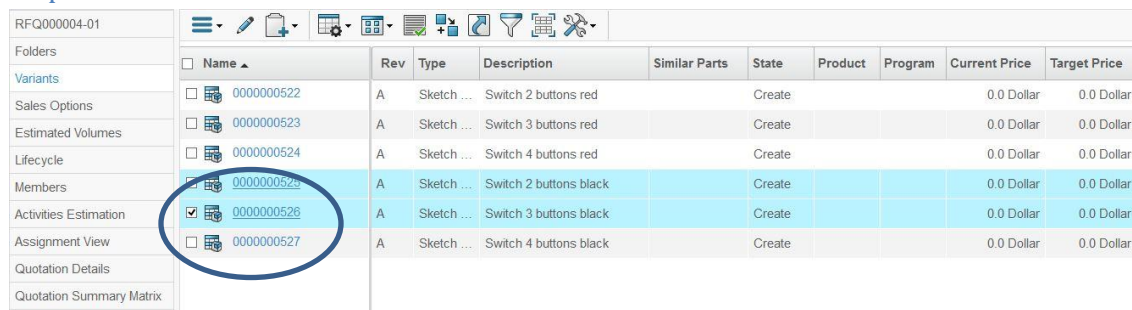
### Step 1 Select Variants command from RFQ interface



RFQ000004-01										
Folders										
<b>Variants</b>										
Sales Options										
Estimated Volumes										
Lifecycle										
Members										
Activities Estimation										
Assignment View										
Quotation Details										

Name	Rev	Type	Description	Similar Parts	State	Product	Program	Current Price	Target Price
0000000522	A	Sketch Part	Switch 2 buttons red		Create			0.0 Dollar	
0000000523	A	Sketch Part	Switch 3 buttons red		Create			0.0 Dollar	
0000000524	A	Sketch Part	Switch 4 buttons red		Create			0.0 Dollar	
0000000525	A	Sketch Part	Switch 2 buttons black		Create			0.0 Dollar	
0000000526	A	Sketch Part	Switch 3 buttons black		Create			0.0 Dollar	
0000000527	A	Sketch Part	Switch 4 buttons black		Create			0.0 Dollar	

### Step 2 Select the Variants to be remove from the list

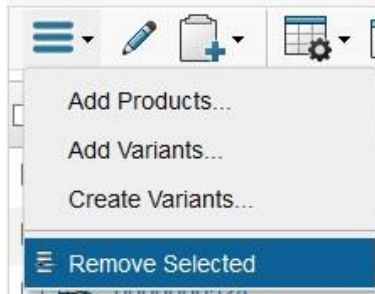


RFQ000004-01										
Folders										
<b>Variants</b>										
Sales Options										
Estimated Volumes										
Lifecycle										
Members										
Activities Estimation										
Assignment View										
Quotation Details										
Quotation Summary Matrix										

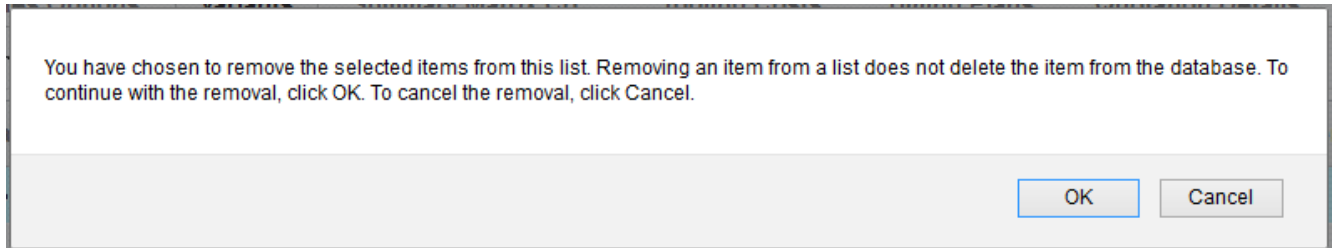
Name	Rev	Type	Description	Similar Parts	State	Product	Program	Current Price	Target Price
0000000522	A	Sketch ...	Switch 2 buttons red		Create			0.0 Dollar	0.0 Dollar
0000000523	A	Sketch ...	Switch 3 buttons red		Create			0.0 Dollar	0.0 Dollar
0000000524	A	Sketch ...	Switch 4 buttons red		Create			0.0 Dollar	0.0 Dollar
0000000525	A	Sketch ...	Switch 2 buttons black		Create			0.0 Dollar	0.0 Dollar
<input checked="" type="checkbox"/> 0000000526	A	Sketch ...	Switch 3 buttons black		Create			0.0 Dollar	0.0 Dollar
<input type="checkbox"/> 0000000527	A	Sketch ...	Switch 4 buttons black		Create			0.0 Dollar	0.0 Dollar

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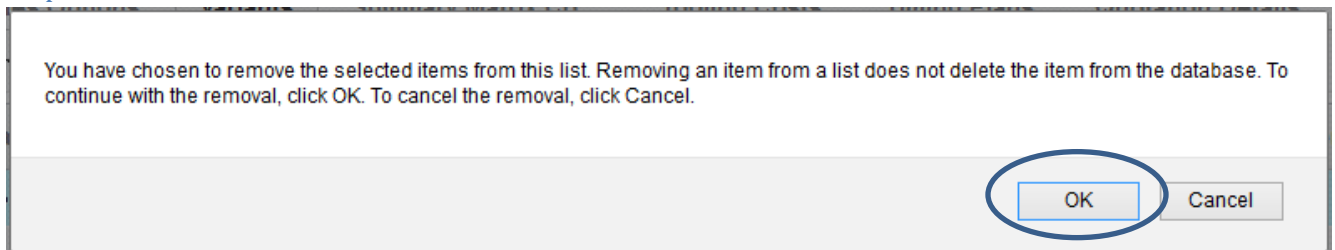
Step 3 Click “Remove Selected” command from the Action menu



The following message will be shown



Step 4 Click Ok to finalized the deletion



Version	11	Date:	28-Nov-2017
Status	Released		20



## RFQ05 Sales Options definition

<b>Purpose</b>	Define Sales Options in order to provide a quotation to Customer	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Sales Manager creates Sales Options and define estimated volume scenarios		
<b>End</b>	RFQ contains Sales Options		
<b>Constraints</b>			

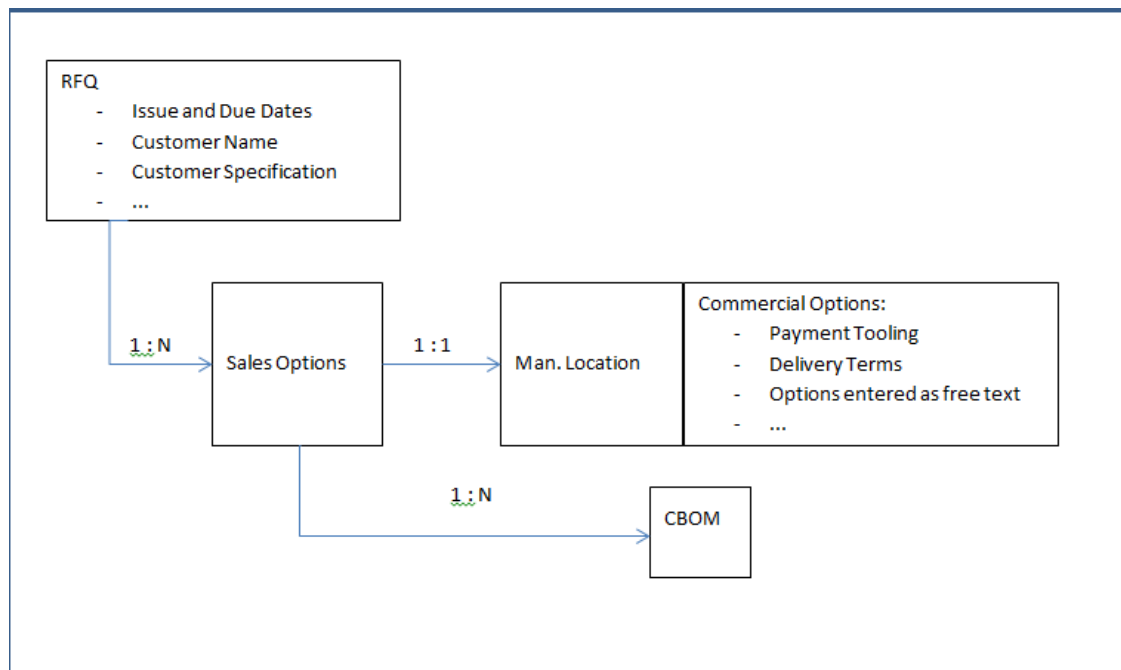
Sales Manager receives a request for quotation from a Customer related to different variants and different volume scenario.

Sales Manager can create several “Sales Options”, that could be related to the same variant but with different volume scenario, tooling set, timing plan, manufacturing location and commercial options.

Sales Options can be defined using the following parameters:

- Variants (that means a CBOM, a document describing the timing plan and a document describing the tooling set)
- a Manufacturing Location
- several Commercial Options

The following picture shows the Sales Option definition

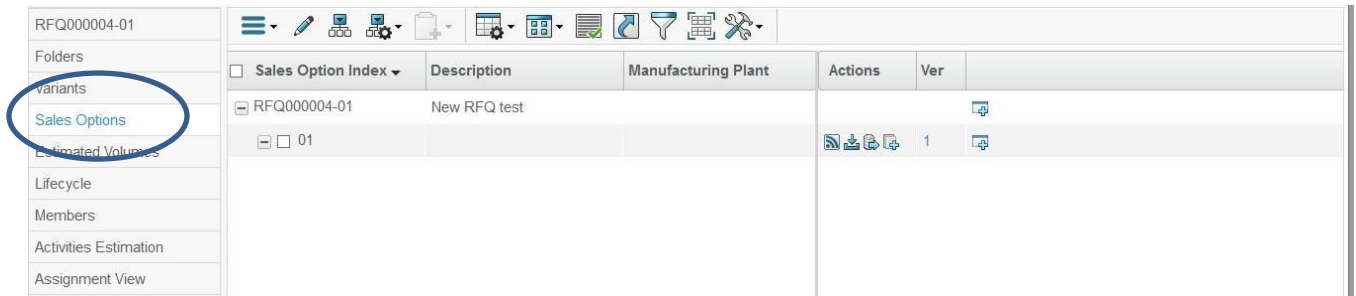


During the RFQ process, Sales Manager can create Sales Options, can define also variants even if the CBOM contents will be defined later. Engineers will define variants (CBOMs), tooling sets and and Launch Managers will define the estimated timing plans.

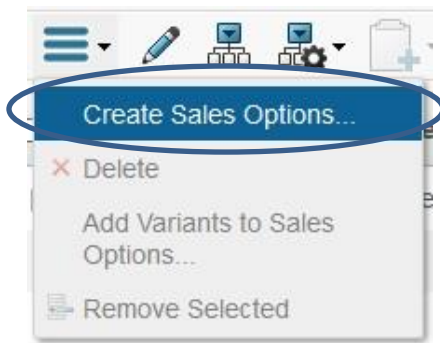
The Quotation Manager and Sales Manager will complete the Sales Options definition selecting variants, manufacturing plant and will define also additional Commercial Options related to the Sales Option.

Version	11	Date:	28-Nov-2017
Status	Released		21

### Step 1 Select Sales Option command from RFQ interface



### Step 2 Select "Create Sales Options" command from the Action menu



### Step 3 Fill in the number of sales options to be created and click Done

RFQ000004-01|Create Sales Options

*Fields in red italics are required*

Type	RFQ Sales Option		
Policy	Sales Options	Number of Sales Options	<input type="text" value="2"/>

Version	11	Date:	28-Nov-2017
Status	Released		22

The new Sales Options will be generated and shown as list into the interface

<input type="checkbox"/> Sales Option Index	Description	Manufacturing Plant	Actions	Ver	
<input type="checkbox"/> RFQ000004-01	New RFQ test				
<input type="checkbox"/> <input type="checkbox"/> 05					
<input type="checkbox"/> <input type="checkbox"/> 04					

Step 4 Click the Edit icon to enable the Edit View



Step 5 Fill in the description and the manufacturing plant

<

Step 6 Click Done in order to save changes

</

Step 7 Click the Edit icon to disable the Edit View



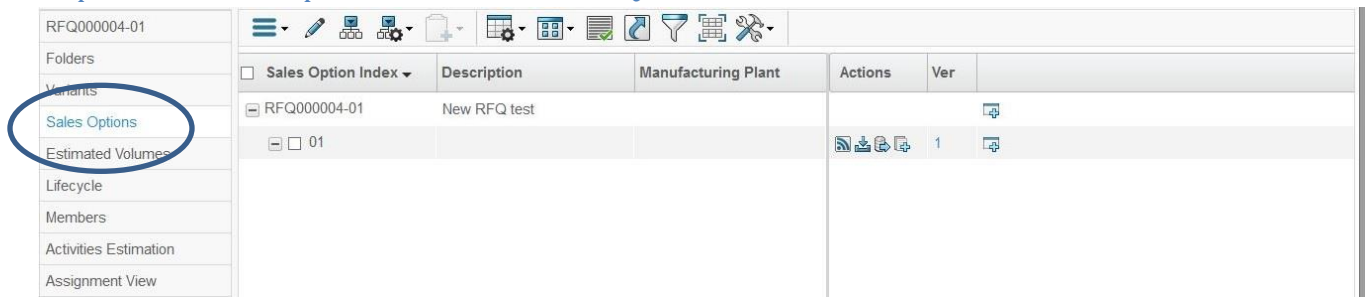
Version	11	Date:	28-Nov-2017
Status	Released		23

## RFQ06 Remove Sales Options definition

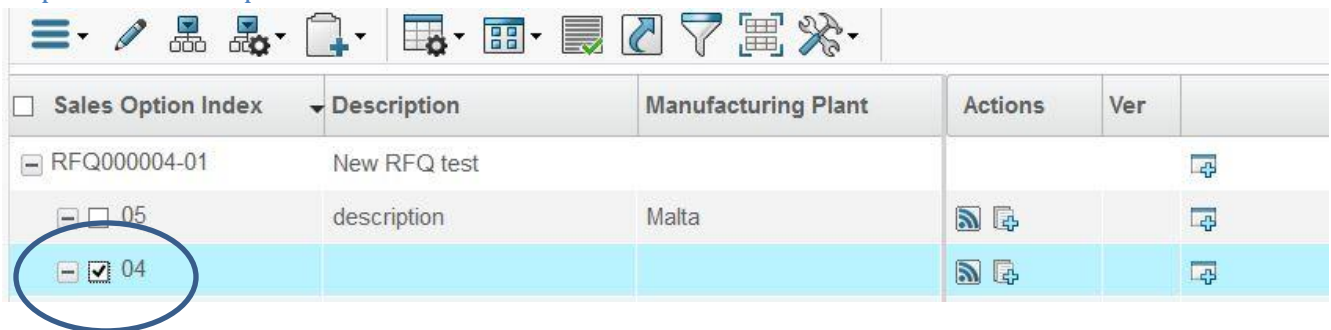
<b>Purpose</b>	Remove Sales Options in order to provide a quotation to Customer requests	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Sales Manager modifies Sales Options and estimated volume scenarios		
<b>End</b>	RFQ updated Sales Options		
<b>Constraints</b>			

During a revision of an existing RFQ, Sales Manager can also decide to remove sales options no longer required.

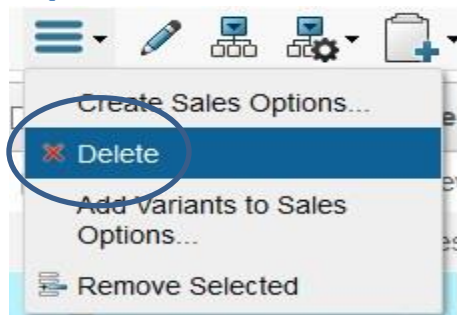
### Step 1 Select Sales Options command from RFQ interface



### Step 2 Select the Options to be remove from the list

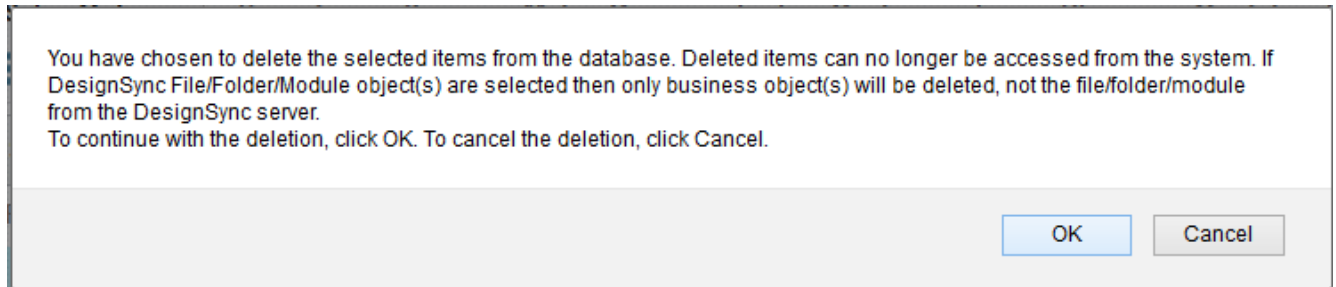


### Step 3 Click "Delete" command from the Action menu

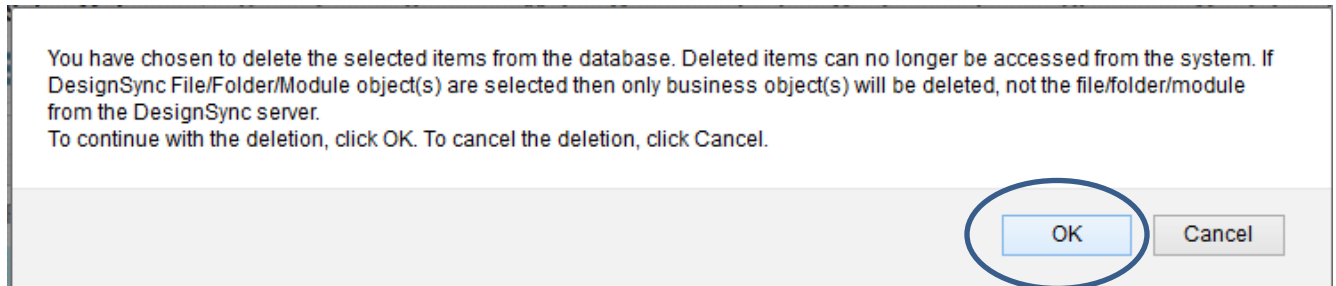


Version	11	Date:	28-Nov-2017
Status	Released		24

The following message will be shown



Step 4 Click OK to finalized the deletion



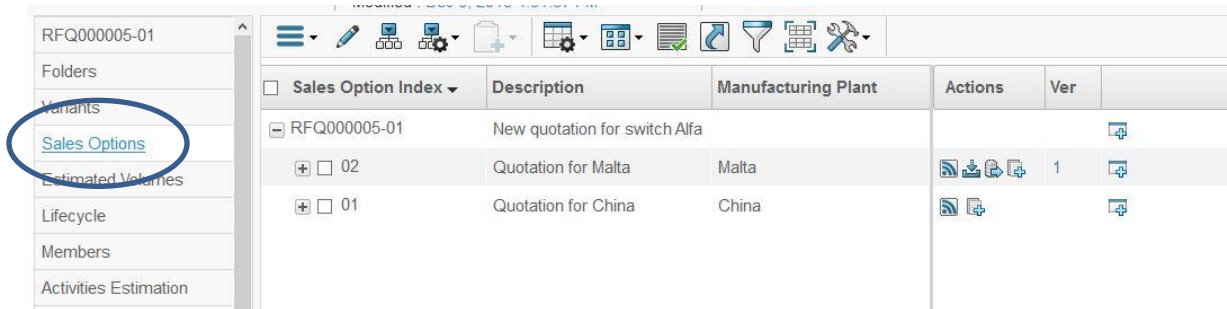
Version	11	Date:	28-Nov-2017
Status	Released		25

## RFQ07 Listing Variants to Sales Options

<b>Purpose</b>	Define variants for different Sales Options contained in RFQ definition	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ exists in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Sales Manager has to define the combination Sales Options-Variants, related to different options requested by Customer or related to different quotation proposed by the Sales Manager		
<b>End</b>	Variants are listed to different Sales Options		
<b>Constraints</b>			

Sales Manager can create several “sales options”, that could be related to the same variants but with different volume scenario. Sales Manager (or Engineer if several CBOMs are created) can define sales options selecting variants related to.

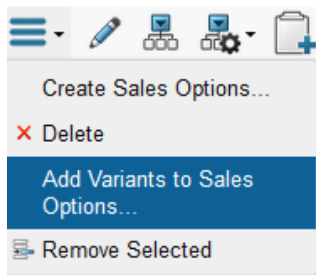
### Step 1 Select Sales Option command from RFQ interface



### Step 2 Select the Sales Option the Variants need to be added to







### Step 3 Click “Add Variants to Sales Options” command from the Action menu







Version	11	Date:	28-Nov-2017
Status	Released		26

















The list of available Variants will be shown

RFQ000005-01: Variants							
							
<input type="checkbox"/> Name ▲	Rev	Type	Description	Similar Parts	State	Product	Prog
<input type="checkbox"/>  0000000552	A	Sket...	Switch Window lifter		Com...		
<input type="checkbox"/>  0000000553	A	Sket...	Switch Color white		Create		
<input type="checkbox"/>  0000000554	A	Sket...	Switch color black		Create		
<div> <div>3 objects</div> <div> <div>Done</div> <div>Cancel</div> </div> </div>							

Step 4 Select the Variants to be added to Sales Option and click Done

RFQ000005-01: Variants							
							
<input checked="" type="checkbox"/> Name ▲	Rev	Type	Description	Similar Parts	State	Product	Prog
<input checked="" type="checkbox"/>  0000000552	A	Sket...	Switch Window lifter		Com...		
<input checked="" type="checkbox"/>  0000000553	A	Sket...	Switch Color white		Create		
<input checked="" type="checkbox"/>  0000000554	A	Sket...	Switch color black		Create		
<div> <div>3 objects, 3 selected</div> <div> <div>Done</div> <div>Cancel</div> </div> </div>							

The selected Variants will be added to the selected Sales Option

					
<input type="checkbox"/> Sales Option Index ▼	Description	Manufacturing Plant	Actions	Ver	
<input type="checkbox"/> RFQ000005-01	New quotation for switch Alfa				
<input type="checkbox"/> 02	Quotation for Malta	Malta	   	1	
<input type="checkbox"/> 0000000554	Switch color black				
<input type="checkbox"/> 0000000553	Switch Color white				
<input type="checkbox"/> 0000000552	Switch Window lifter				
<input type="checkbox"/> 01	Quotation for China	China	 		
<input type="checkbox"/> 0000000554	Switch color black				
<input type="checkbox"/> 0000000553	Switch Color white				
<input type="checkbox"/> 0000000552	Switch Window lifter				

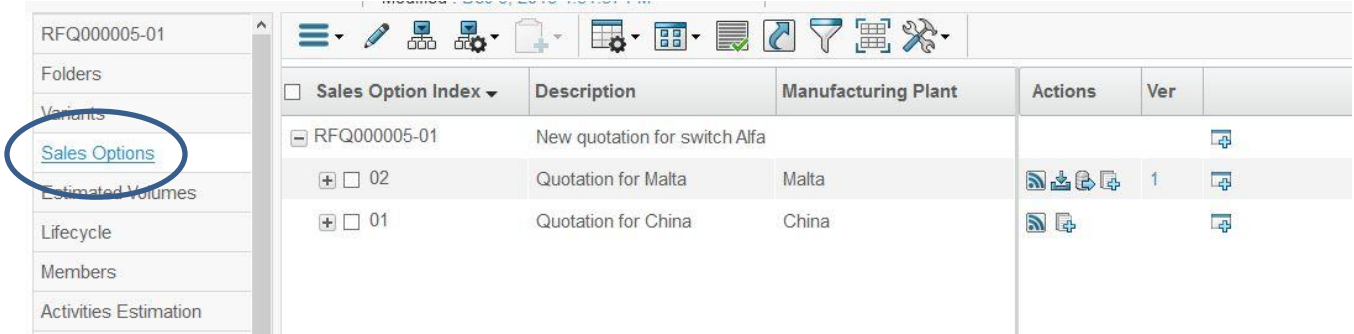
Version	11	Date:	28-Nov-2017
Status	Released		27



## RFQ08 Remove Variants from Sales Options list

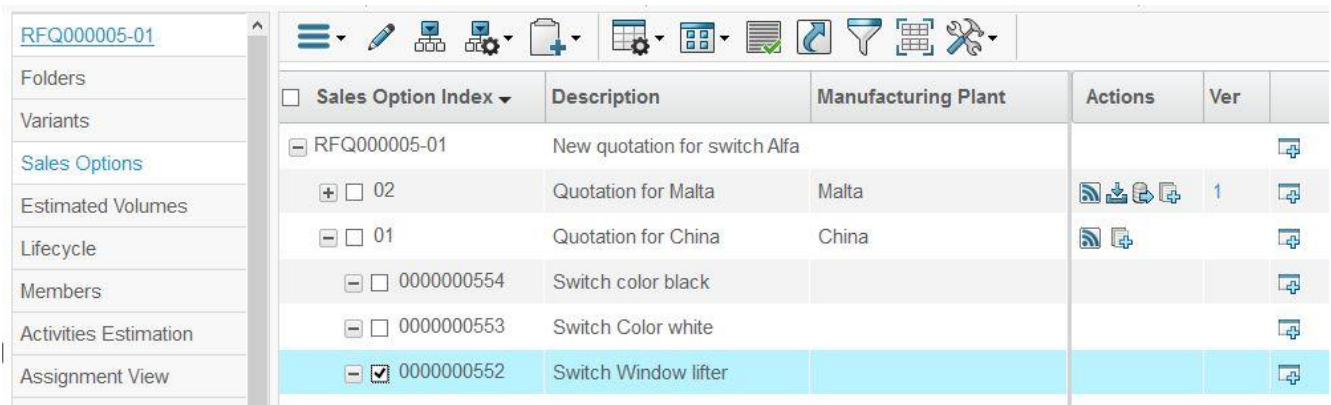
<b>Purpose</b>	Remove Variants form Sales Options Variants List	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Sales Manager has to define the combination Sales Options-Variants, related to different options requested by Customer or related to different quotation proposed by the Sales Manager		
<b>End</b>	Variants is removed from Sales Options Variant List		
<b>Constraints</b>			

### Step 1 Select Sales Option command from RFQ interface

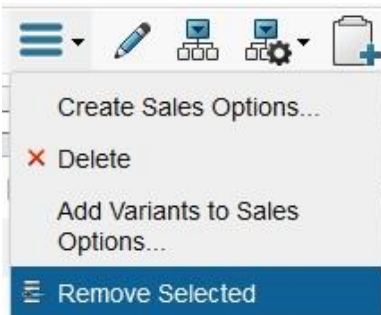


### Step 2 click the icon to expand the Sales Option that contains the Variant to be removed

### Step 3 Select the Variant to be removed from the list



### Step 4 Click "Remove Selected" command from the Action menu



Version	11	Date:	28-Nov-2017
Status	Released		28



The following message will be shown

You have chosen to remove the selected items from this list. Removing an item from a list does not delete the item from the database. To continue with the removal, click OK. To cancel the removal, click Cancel.

Step 5 Click OK to finalized the deletion

You have chosen to remove the selected items from this list. Removing an item from a list does not delete the item from the database. To continue with the removal, click OK. To cancel the removal, click Cancel.

Version	11	Date:	28-Nov-2017
Status	Released		29

## RFQ09 Estimated volumes definition

<b>Purpose</b>	Define estimated volumes for variants contained in RFQ definition	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity or RFQ		
<b>Interactions</b>	Sales Manager has to define estimated volumes for each combination sales option-variant contained in RFQ or update volumes for options already existing		
<b>End</b>	Sales Options have estimated volumes defined		
<b>Constraints</b>			

Sales Manager has to enter the estimated volumes for each variant contained in the sales options; in case of existing variants (existing products or programs, or variants contained in RFQ revised) Sales Manager can update these values.

### Step 1 Select Estimated Volume command from RFQ interface

The list of all Variants related to the Sales Options will be shown

RFQ000005-01	Estimated Volum...				
Folders					
Variants					
Sales Options					
<b>Estimated Volumes</b>					
Lifecycle					
Members					
Activities Estimation					
Assignment View					
Quotation Details					
Quotation Summary					

Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume	
02	Quotation for Malta	Malta	0000000552	20172018201920202021	
02	Quotation for Malta	Malta	0000000553	20172018201920202021	
02	Quotation for Malta	Malta	0000000554	20172018201920202021	
01	Quotation for China	China	0000000552	20172018201920202021	
01	Quotation for China	China	0000000553	20172018201920202021	
01	Quotation for China	China	0000000554	20172018201920202021	

The number of years shown into the Estimate Annual Volume column is equal to the Program Lifetime value filled in into RFQ Details page

<b>Estimate Annual Volume</b>	
20172018201920202021	

RFQ000005-01					
Folders					
Variants					
Sales Options					
<b>Estimated Volumes</b>					
Lifecycle					
Members					
Activities Estimation					
Assignment View					
Quotation Details					
Quotation Summary					

<b>Details</b>			
Issue Date	Nov 26, 2015	Due Date	Dec 10, 2015
Customer Name	FCA	Customer Documentation Reference	X152-EPB-ROOF-SPEC-v1.2 18
Program/Platform #	X152	Vehicle Model Year	
Customer Part #	FCA 555	Part Description	Switches for door and window lift
Current Price	0.0 Dollar	Target Price	0.0 Dollar
Quotation Currency	Euro	Quotation Description	New quotation for switch Alfa
Quote Type	New Product	Quote Level	Engineering Estimate
Program Lifetime	5	Start of Production	Nov 1, 2017


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Status	Released		30

## To update the “Estimate Annual Volume” for a single Variant

### Step 2a Click Edit command

RFQ000005-01	Estimated Volum...				
Folders					
Variants					
Sales Options					
Estimated Volumes					
Lifecycle					
Members					
Activities Estimation					
Assignment View					
Quotation Details					
Quotation Summary					

Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume	
02	Quotation for Malta	Malta	0000000552	20172018201920202021	
02	Quotation for Malta	Malta	0000000553	20172018201920202021	
02	Quotation for Malta	Malta	0000000554	20172018201920202021	
01	Quotation for China	China	0000000552	20172018201920202021	
01	Quotation for China	China	0000000553	20172018201920202021	
01	Quotation for China	China	0000000554	20172018201920202021	

The Estimated Volume page will be shown

EstimatedVolume

Column  Value

<input type="checkbox"/>	Year	Estimated Annual Volume
<input type="checkbox"/>	2017	<input type="text"/>
<input type="checkbox"/>	2018	<input type="text"/>
<input type="checkbox"/>	2019	<input type="text"/>
<input type="checkbox"/>	2020	<input type="text"/>
<input type="checkbox"/>	2021	<input type="text"/>

### Step 3a Fill in the Estimated Volume for each year

#### 1. Manually for each year

EstimatedVolume

Column  Value

<input type="checkbox"/>	Year	Estimated Annual Volume
<input type="checkbox"/>	2017	<input type="text" value="15000"/>
<input type="checkbox"/>	2018	<input type="text" value="10000"/>
<input type="checkbox"/>	2019	<input type="text" value="10000"/>
<input type="checkbox"/>	2020	<input type="text" value="5000"/>
<input type="checkbox"/>	2021	<input type="text" value="5000"/>

#### 2. Using the massive update (eg. if the value is the same for all the years or most of them)

- select the Column name and fill in the Volume Value

EstimatedVolume

Column  Value

<input type="checkbox"/>	Year	Estimated Annual Volume
<input type="checkbox"/>	2017	<input type="text"/>

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If the value is the same for all the years

- Click Apply to all command

EstimatedVolume

Column: Estimated Annual Volume Value: 20000

Apply to Selected Apply to all

The Volume Value will be filled in for all the years

EstimatedVolume

Column: Estimated Annual Volume Value: 20000

Apply to Selected Apply to all

<input type="checkbox"/>	Year	Estimated Annual Volume
<input type="checkbox"/>	2017	20000
<input type="checkbox"/>	2018	20000
<input type="checkbox"/>	2019	20000
<input type="checkbox"/>	2020	20000
<input type="checkbox"/>	2021	20000

Done Cancel

If the value is the same for a subset of years

- Select the set of years the volume will be the same

EstimatedVolume

Column: Estimated Annual Volume Value: 20000

Apply to Selected Apply to all

<input type="checkbox"/>	Year	Estimated Annual Volume
<input checked="" type="checkbox"/>	2017	
<input checked="" type="checkbox"/>	2018	
<input checked="" type="checkbox"/>	2019	
<input type="checkbox"/>	2020	
<input type="checkbox"/>	2021	

Done Cancel

- Click Apply to Selected command

EstimatedVolume

Column: Estimated Annual Volume Value: 20000

Apply to Selected Apply to all

The Volume Value will be filled in for the selected years

EstimatedVolume

Column: Estimated Annual Volume Value: 20000

Apply to Selected Apply to all

<input type="checkbox"/>	Year	Estimated Annual Volume
<input checked="" type="checkbox"/>	2017	20000
<input checked="" type="checkbox"/>	2018	20000
<input checked="" type="checkbox"/>	2019	20000
<input type="checkbox"/>	2020	
<input type="checkbox"/>	2021	

Done Cancel

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- Fill in manually the other values

EstimatedVolume

Column: Estimated Annual Volume Value: 20000 Apply to Selected Apply to all

<input type="checkbox"/>	Year	Estimated Annual Volume
<input checked="" type="checkbox"/>	2017	20000
<input checked="" type="checkbox"/>	2018	20000
<input checked="" type="checkbox"/>	2019	20000
<input type="checkbox"/>	2020	15000
<input type="checkbox"/>	2021	10000

Done Cancel

Step 4a Click Done in order to finalize the changes

EstimatedVolume

Column: Estimated Annual Volume Value: 20000 Apply to Selected Apply to all

<input type="checkbox"/>	Year	Estimated Annual Volume
<input type="checkbox"/>	2017	20000
<input type="checkbox"/>	2018	20000
<input type="checkbox"/>	2019	20000
<input type="checkbox"/>	2020	20000
<input type="checkbox"/>	2021	20000

Done Cancel

The Estimate Annual Volume value will be updated for the specific Variant

Estimated Volum...					
Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume	
02	Quotation for Malta	Malta	0000000552	2017 2018 2019 2020 2021	2000020000200002000020000
02	Quotation for Malta	Malta	0000000553	20172018201920202021	- - - - -

Version	11	Date:	28-Nov-2017
Status	Released	33	

## To massive update the “Estimate Annual Volume”

### Step 2b Click Estimated Volume command

RFQ000005-01	Estimated Volum...				
Folders					
Variants					
Sales Options					
Estimated Volumes					
Lifecycle					
Members					
Activities Estimation					
Assignment View					
Quotation Details					
Quotation Summary					

Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume	
02	Quotation for Malta	Malta	0000000552	20172018201920202021	
02	Quotation for Malta	Malta	0000000553	20172018201920202021	
02	Quotation for Malta	Malta	0000000554	20172018201920202021	
01	Quotation for China	China	0000000552	20172018201920202021	
01	Quotation for China	China	0000000553	20172018201920202021	
01	Quotation for China	China	0000000554	20172018201920202021	

The Estimated Volume page will be shown

Estimated Volumes			
<input type="checkbox"/> Sales Option Index ▲	Variant	Year	Estimated Annual Volume
<input type="checkbox"/> 01	0000000552	2017	
<input type="checkbox"/> 01	0000000552	2018	
<input type="checkbox"/> 01	0000000552	2019	
<input type="checkbox"/> 01	0000000552	2020	
<input type="checkbox"/> 01	0000000552	2021	
<input type="checkbox"/> 01	0000000553	2017	
<input type="checkbox"/> 01	0000000553	2018	

### Step 3b Click Edit Command

Estimated Volumes		
<input type="checkbox"/> Sales Option Index ▲	Variant	Year
<input type="checkbox"/> 01	0000000552	2017
<input type="checkbox"/> 01	0000000552	2018

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The Edit page will be enabled

Estimated Volumes			
<div> <span>✎</span> <span>⚙</span> <span>📅</span> <span>📊</span> <span>➕</span> <span>🔍</span> <span>🌐</span> <span>🔧</span> </div> <div> Mass Update <span>▼</span> <span>Save</span> <span>Reset</span> <span>Close</span> </div>			
<input type="checkbox"/> Sales Option Index	Variant	Year	Estimated Annual Volume
<input type="checkbox"/> 01	0000000552	2017	
<input type="checkbox"/> 01	0000000552	2018	
<input type="checkbox"/> 01	0000000552	2019	
<input type="checkbox"/> 01	0000000552	2020	
<input type="checkbox"/> 01	0000000552	2021	
<input type="checkbox"/> 01	0000000553	2017	

#### Step 4b Fill in the Estimated Volume for each year

If the value is the same for all the years

- Select the Mass Update value

Estimated Volumes

✎
⚙
📅
📊
➕
🔍
🌐
🔧

Mass Update Estimated Annual Volume ▼

Apply to Selected Apply to All X

☐ Sales Op

☐ 01 0000000552

- Fill in the volume value

Estimated Volumes

✎
⚙
📅
📊
➕
🔍
🌐
🔧

Mass Update Estimated Annual Volume ▼

Apply to Selected Apply to All X

☐ Sales Op

- Click Apply to All command

Estimated Volumes

✎
⚙
📅
📊
➕
🔍
🌐
🔧

Mass Update Estimated Annual Volume ▼

Apply to Selected Apply to All X

☐ Sales Op

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The Volume Value will be filled in for all the years

Sales Option Index	Variant	Year	Estimated Annual Volume
<input type="checkbox"/> 01	0000000552	2017	20000
<input type="checkbox"/> 01	0000000552	2018	20000
<input type="checkbox"/> 01	0000000552	2019	20000
<input type="checkbox"/> 01	0000000552	2020	20000
<input type="checkbox"/> 01	0000000552	2021	20000
<input type="checkbox"/> 01	0000000553	2017	20000

If the value is the same for a subset of years

- Select the set of Sales Optionitems for which the volume will be the same

Sales Option Index	Variant	Year	Estimated Annual Volume
<input checked="" type="checkbox"/> 01	0000000552	2017	
<input checked="" type="checkbox"/> 01	0000000552	2018	
<input checked="" type="checkbox"/> 01	0000000552	2019	
<input checked="" type="checkbox"/> 01	0000000552	2020	
<input checked="" type="checkbox"/> 01	0000000552	2021	
<input checked="" type="checkbox"/> 01	0000000553	2017	

- Select the Mass Update value

Mass Update: Estimated Annual Volume

Apply to Selected Apply to All X

- Fill in the volume value

Mass Update: Estimated Annual Volume

Apply to Selected Apply to All X

20000

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- Click Apply to Selected command

Estimated Volumes

Mass Update: Estimated Annual Volume

Apply to Selected Apply to All X

☐ Sales Option: 20000

The Volume Value will be filled in for the selected years  
The others value will be filled in manually or in the same way

Estimated Volumes

Mass Update: Save Reset Close

<input type="checkbox"/> Sales Option Index	Variant	Year	Estimated Annual Volume
<input checked="" type="checkbox"/> A 01	0000000552	2017	20000
<input checked="" type="checkbox"/> A 01	0000000552	2018	20000
<input checked="" type="checkbox"/> A 01	0000000552	2019	20000
<input checked="" type="checkbox"/> A 01	0000000552	2020	20000
<input checked="" type="checkbox"/> A 01	0000000552	2021	20000
<input checked="" type="checkbox"/> A 01	0000000553	2017	20000

Step 5b Click Save in order to finalize the changes

Estimated Volumes

Mass Update: Save Reset Close

<input type="checkbox"/> Sales Option Index	Variant	Year	Estimated Annual Volume
<input type="checkbox"/> 01	0000000552	2017	20000
<input type="checkbox"/> 01	0000000552	2018	20000
<input type="checkbox"/> 01	0000000552	2019	20000
<input type="checkbox"/> 01	0000000552	2020	20000
<input type="checkbox"/> 01	0000000552	2021	20000
<input type="checkbox"/> 01	0000000553	2017	20000

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Step 6b Click Edit command in order to disable the edit page

Estimated Volumes

Mass Update:  Save Reset Close

<input type="checkbox"/> Sales Option Index	Variant	Year	Estimated Annual Volume
<input type="checkbox"/> 01	0000000552	2017	
<input type="checkbox"/> 01	0000000552	2018	
<input type="checkbox"/> 01	0000000552	2019	
<input type="checkbox"/> 01	0000000552	2020	
<input type="checkbox"/> 01	0000000552	2021	
<input type="checkbox"/> 01	0000000553	2017	

Step 7b Click Refresh command to show the updated values in Estimated Volumes page

New quotation for switch Alfa State: RFQ Opportunity RFQ Concept BOM Owner: kevinb Modified: Mar 19, 2016 4:04:29 PM

Estimated Volum...

Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume

The updated values will be shown

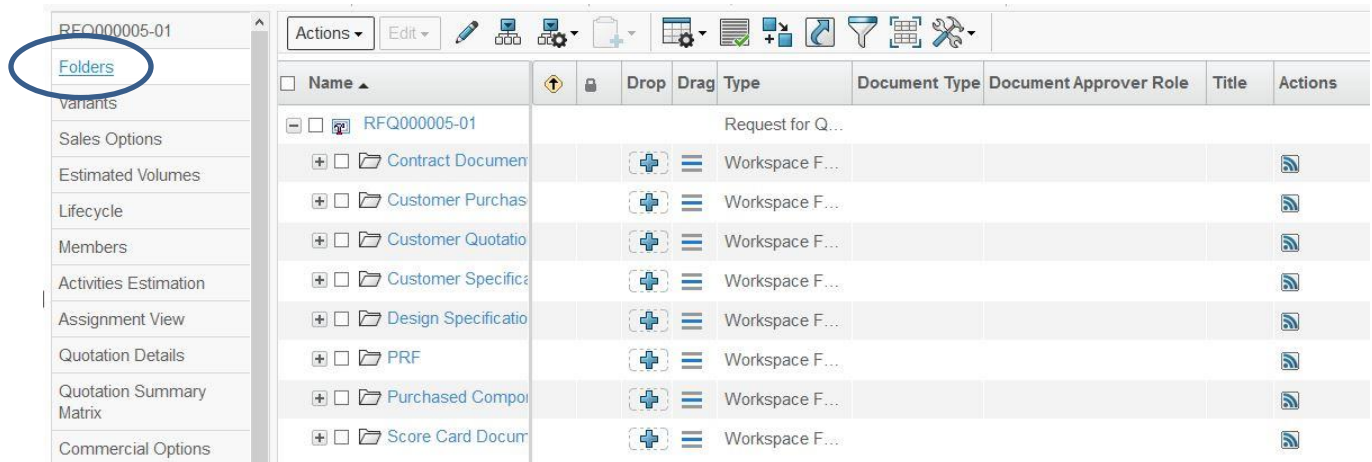
Sales Option Index	Description	Manufacturing Plant	Variant	Estimate Annual Volume	
02	Quotation for Malta	Malta	0000000552	2017 2018 2019 2020 2021 2000020000200002000020000	
02	Quotation for Malta	Malta	0000000553	2017 2018 2019 2020 2021 2000020000200002000020000	
02	Quotation for Malta	Malta	0000000554	2017 2018 2019 2020 2021 2000020000200002000020000	
01	Quotation for China	China	0000000552	2017 2018 2019 2020 2021 2000020000200002000020000	
01	Quotation for China	China	0000000553	2017 2018 2019 2020 2021 2000020000200002000020000	
01	Quotation for China	China	0000000554	2017 2018 2019 2020 2021 2000020000200002000020000	

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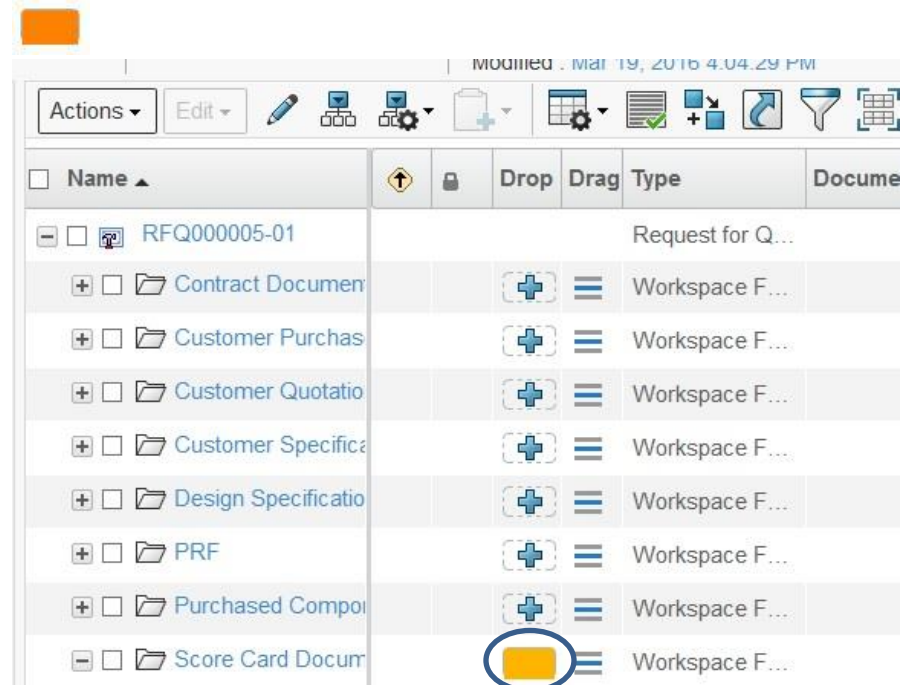
## RFQ10 Score Card documents upload

<b>Purpose</b>	Upload Score Card documents into PLM	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity		
<b>Interactions</b>	Sales Manager has to upload documents in a folder "Score Cards Documents"		
<b>End</b>	RFQ contains Score Card documents		
<b>Constraints</b>			

### Step 1 Select Folders command from RFQ interface



Step 2 Select the file from the file system and drop it with the mouse over the  icon related to the specific folder. Then release the mouse in order to start the document encoding. The icon becomes orange

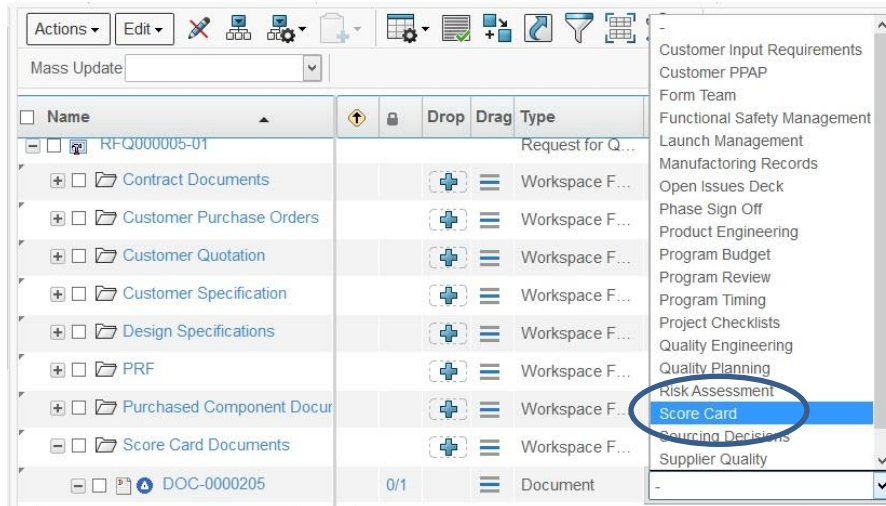


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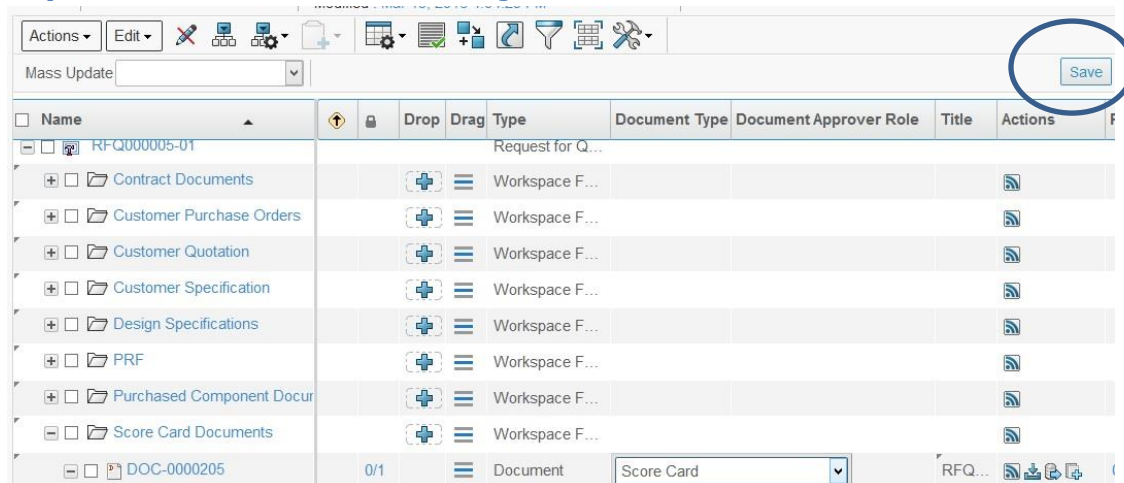
Step 3 Click the Edit icon to enable the Edit View



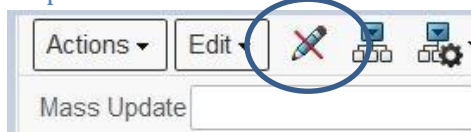
Step 4 Select a document type from the combo



Step 5 Click Save in order to save changes



Step 6 Click the Edit icon to disable the Edit View



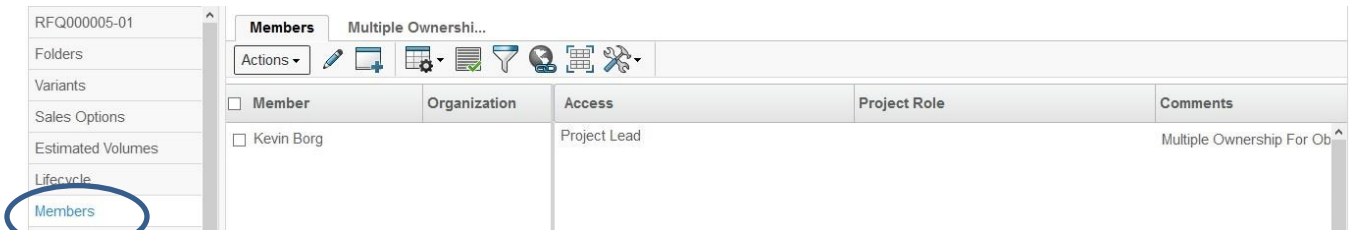
Look at RFQ02 use case to show the behavior using also the “Create New Document” and Add Existing functionalities.

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Status	Released		40

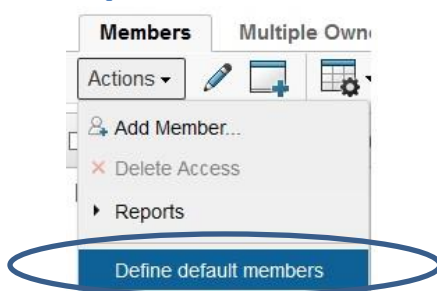
## RFQ11 Quoting Manager selection

<b>Purpose</b>	Define Quotation Managers involved in quotation process	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity		
<b>Interactions</b>	Sales Manager has to define the Quotation Managers involved		
<b>End</b>	Quotation Managers are involved in quotation process		
<b>Constraints</b>			

### Step 1 Select Members command from RFQ interface



### Step 2 Click Define default members command from Actions Menu



The default members list will be added as RFQ Members

RFQ000005-01	<b>Members</b> Multiple Ownershi...
Folders	Actions
Variants	Member Organization Access Project Role Comments
Sales Options	<input type="checkbox"/> Alexander Galea Project Member Multiple Ownership
Estimated Volumes	<input type="checkbox"/> Allen Carl Bonnici Test Project Member Multiple Ownership
Lifecycle	<input type="checkbox"/> Anabel Cutajar Project Member Multiple Ownership
<b>Members</b>	<input type="checkbox"/> Angelo Scerri Project Member Multiple Ownership
Activities Estimation	<input type="checkbox"/> Anthony Caruana Project Member Multiple Ownership
Assignment View	<input type="checkbox"/> Giuseppe Loreto Project Lead Project Lead Multiple Ownership
Quotation Details	<input type="checkbox"/> Gregory Joslin Project Lead Project Lead Multiple Ownership
Quotation Summary Matrix	<input type="checkbox"/> Johann Barbara Project Member Multiple Ownership
Commercial Options	<input type="checkbox"/> Kevin Borg Project Lead Multiple Ownership
Program Release Form	<input type="checkbox"/> Kevin Mifsud Project Member Multiple Ownership
Routes	

The Quotation manager will have Project Lead role

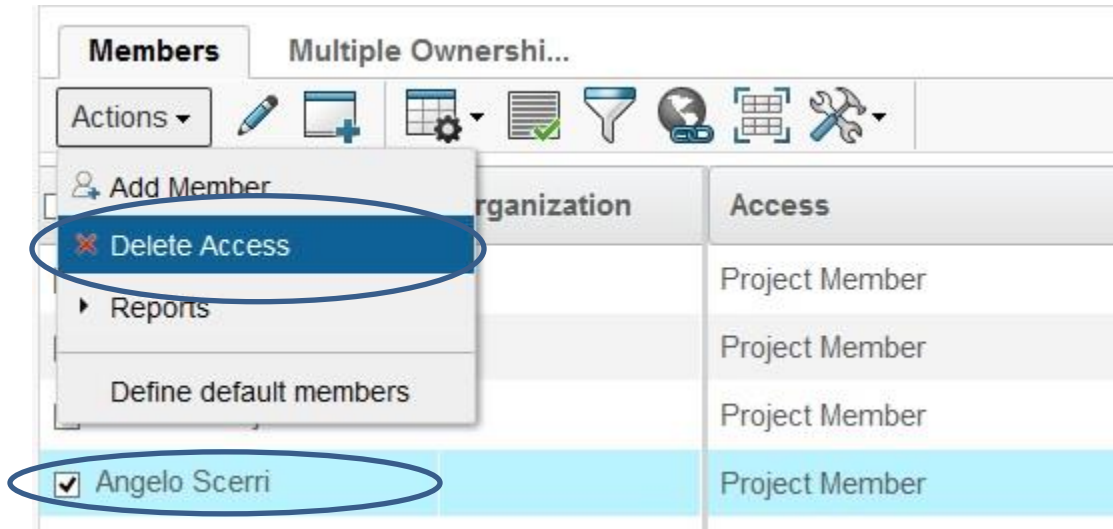
The other member will be added with an access as Project Member. It means that they are able to upload documents and provide information but not to remove estimation tasks or modify access permission to the RFQ package

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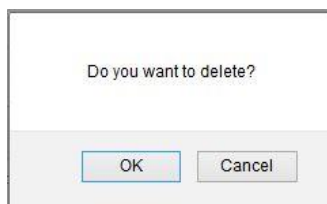


## To remove a Member from the Member list

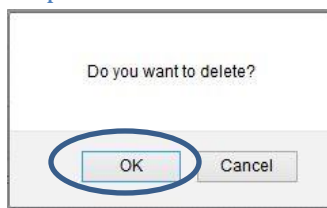
Step 3a Select the member to be removed and click Delete Access command from Actions menu



The following message will be shown

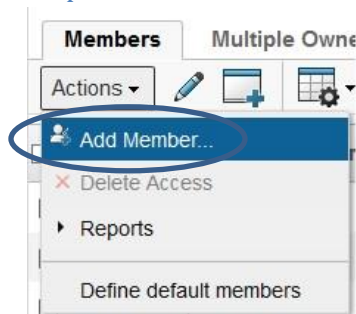


Step 4a Click OK to finalized the deletion



## To add a Member to the Member list

Step 3b Click Add Member command from Actions menu



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The full search page will be shown

Search Refinement

State: Active

Taxonomies

Types

Person(33)

Attributes

Name

Originated

Modified

Description

Change Assignment

Search Results 1 - 33 of approx. 33 Results Page Size: 50 (Max Value: 1000)

Name	Email Address	Work Phone Number
3DIndexAdminUser		
VPLM Administration User	Unknown	Unknown
Alison Galea	Alison.Galea@methode-eur.com	
Angelo Scerri	Angelo.Scerri@methode-eur.com	
Jaksic Boban	Boban.Jaksic@methode-eur.com	
Charles Zammit	Charles.Zammit@methode-eur.com	
Dan Isai	Dan.Isai@methode-eur.com	
David Debono	David.Debono@methode-eur.com	
David Zammit	David.Zammit@methode-eur.com	
Edward Ginoell	Edward.Ginoell@methode-eur.com	

Submit

Step 3c Select the Member needs to be added and click Submit command

Search Refinement

State: Active

Taxonomies

Types

Person(33)

Attributes

Name

Originated

Modified

Description

Change Assignment

Search Results 1 - 33 of approx. 33 Results Page Size: 50 (Max Value: 1000)

Name	Email Address	Work Phone Number
3DIndexAdminUser		
VPLM Administration User	Unknown	Unknown
Alison Galea	Alison.Galea@methode-eur.com	
<input checked="" type="checkbox"/> Angelo Scerri	Angelo.Scerri@methode-eur.com	
Jaksic Boban	Boban.Jaksic@methode-eur.com	
Charles Zammit	Charles.Zammit@methode-eur.com	
Dan Isai	Dan.Isai@methode-eur.com	
David Debono	David.Debono@methode-eur.com	
David Zammit	David.Zammit@methode-eur.com	
Edward Ginoell	Edward.Ginoell@methode-eur.com	

Submit

The new member will be added to the list

Version	11	Date:	28-Nov-2017
Status	Released		43



## RFQ12 Go/No Go decision

<b>Purpose</b>	Define if RFQ is feasible	<b>Status</b>	Define
<b>Stakeholders</b>	Senior Sales Manager or Senior Quoting Manager		
<b>Beginning</b>	RFQ is in state RFQ Opportunity		
<b>Interactions</b>	Meeting with other managers (Sales, Engineering, Launch Manager, Quoting, etc.). Sales Manager or Quoting Manager decides if RFQ is feasible or cancelled		
<b>End</b>	Canceled RFQ will move to Cancelled state while approved RFQ will move to RFQ state and transferred to Quoting Manager		
<b>Constraints</b>			

The Senior Sales Manager or Senior Quoting Manager, after a meeting with other managers, will promote the RFQ package to the state RFQ in order to define a quotation (in case of GO), or promote the RFQ package to the state Cancelled if not feasible.

### Sales Manager notify Senior Sales Manager and Senior Quoting Manager for Go/No Go Approval

Because the Senior Sales Manager and the Senior Quoting Manager has to be involved into Go/No Process approval the Sales Manager, once completed the preliminary activities, has to notify them.

#### Step 1 Select RFQ main page

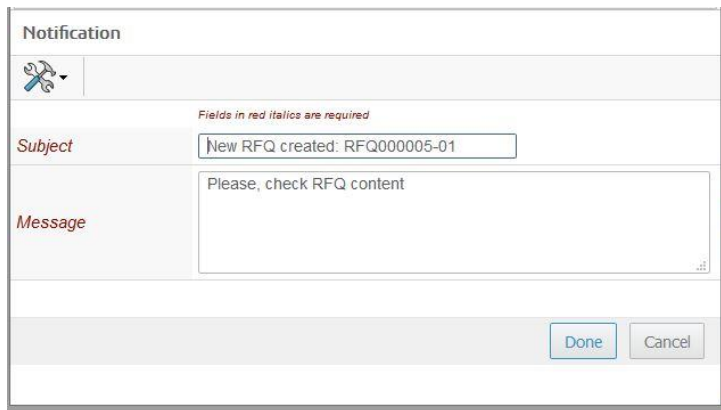
Details			
Issue Date	Nov 26, 2015	Due Date	Dec 10, 2015
Customer Name	FCA	Customer Documentation Reference	Customer Require Customer Standar X152-EPB-ROOF
Program/Platform #	X152	Vehicle Model Year	
Customer Part #	FCA.555	Part Description	Switches for door
Current Price	0.0 Dollar	Target Price	0.0 Dollar
Quotation Currency	Euro	Quotation Description	New quotation for :
Quote Type	New Product	Quote Level	Engineering Estim
Program Lifetime	5	Start of Production	Nov 1, 2017

#### Step 2 Select the Mail Icon from the toolbar



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The Notification page will be shown



Notification

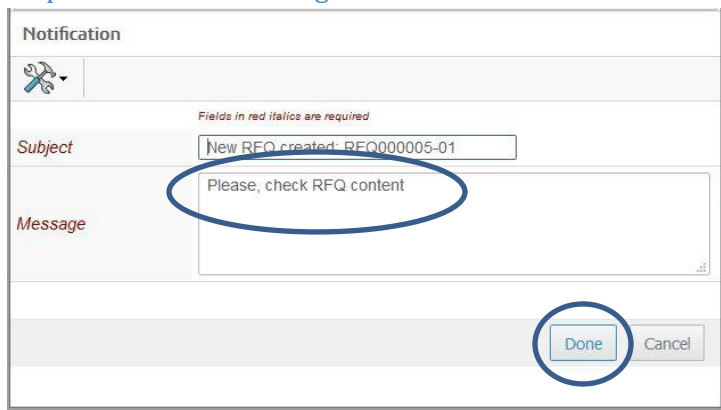
*Fields in red italics are required*

**Subject** *New RFQ created: RFQ000005-01*

**Message** *Please, check RFQ content*

Done Cancel

Step 3 Refine the Message text and click Done



Notification

*Fields in red italics are required*

**Subject** *New RFQ created: RFQ000005-01*

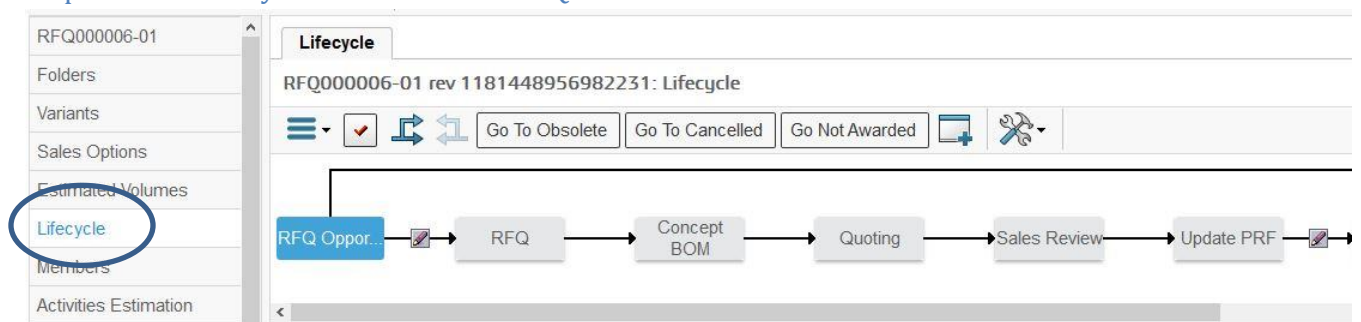
**Message** *Please, check RFQ content*

Done Cancel

The notification will be sent to all users with roles Senior Sales Manager and Senior Quoting Manager

## Go/No Go Approval

Step 4 Select Lifecycle command from RFQ interface



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The quotation is feasible do the following step:

Step 5a The quotation is feasible - Click the hyperlink related to the Quotation Estimate signature

**Lifecycle**

RFQ000006-01 rev 1181448956982231: Lifecycle

Go To Obsolete Go To Cancelled Go Not Awarded

RFQ Oppor... RFQ Concept BOM Quoting Sales Review Update PRF

**Tasks/Signatures Approvals**

Show: All Approvals Approval Status: All Filter

Name	Approver	Title	Approval Status	Approval/Due Date	Co
Quotation Cancelled	QM Senior Quoting Manager(Role) AM Senior Account Manager(Role)		Awaiting Approval		
Quotation Estimate	QM Senior Quoting Manager(Role) AM Senior Account Manager(Role)		Awaiting Approval		

The Approval page will be shown

**Approval**

Fields in red italics are required.

**Approval**

**Comments**

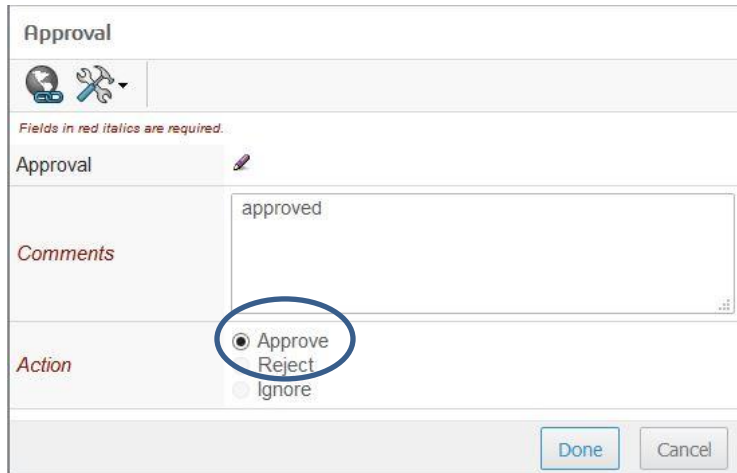
**Action**

☐ Approve  
☐ Reject  
☐ Ignore

Done Cancel


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Status	Released		46

Step 6a Fill in a Comment (eg. the reason for the feasibility) and select the Approve Action



**Approval**

Fields in red italics are required.

**Approval** 

**Comments**

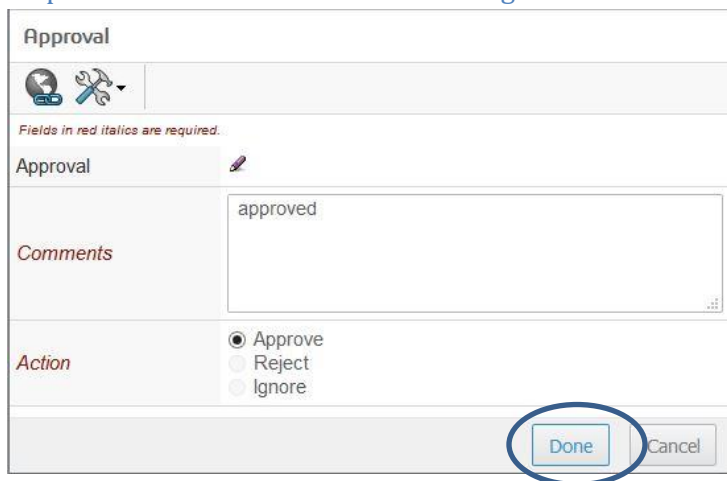
approved

**Action**

☒ Approve  
☐ Reject  
☐ Ignore


**Done** **Cancel**

Step 7a Click Done to finalized the change



**Approval**

Fields in red italics are required.

**Approval** 

**Comments**

approved

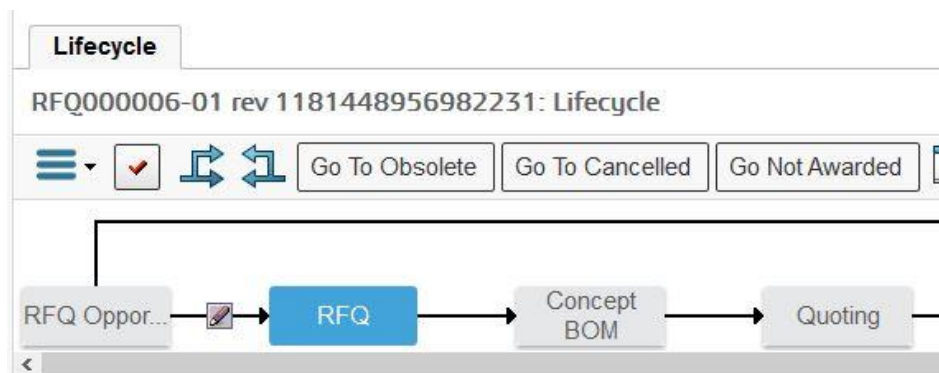
**Action**

☒ Approve  
☐ Reject  
☐ Ignore

**Done** **Cancel**

A notification will be sent to users belongs to Member List “RFQ Core Team Accepted”

The RFQ lifecycle will be moved in RFQ state



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Status	Released		47

The quotation is not feasible. Do the following step:

Step 5b Click the hyperlink related to the Quotation Cancelled signature

**Lifecycle**



RFQ000006-01 rev 1181448956982231: Lifecycle

Go To Obsolete Go To Cancelled Go Not Awarded

RFQ Oppor... RFQ Concept BOM Quoting Sales Review Update PRF

**Tasks/Signatures Approvals**

Show: All Approvals Approval Status: All Filter

Name	Approver	Title	Approval Status	Approval/Due Date	Co
Quotation Cancelled	QM Senior Quoting Manager(Role) AM Senior Account Manager(Role)		 Awaiting Approval		
Quotation Estimate	QM Senior Quoting Manager(Role) AM Senior Account Manager(Role)		 Awaiting Approval		

The Approval page will be shown

**Approval**

Fields in red italics are required.

**Approval**

**Comments**

**Action**

☐ Approve  
☐ Reject  
☐ Ignore

Done Cancel

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Status	Released		48

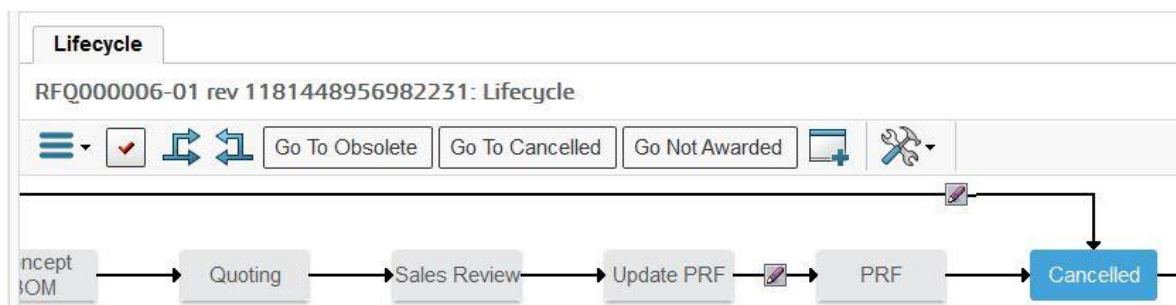
Step 6b Fill in a Comment (eg. the reason for the not feasibility) and select the Approve Action

The screenshot shows an 'Approval' form. At the top, there are icons for a globe and a wrench. Below them, a note states 'Fields in red italics are required.' The form has three main sections: 'Approval' (with a pencil icon), 'Comments' (a text area containing the word 'cancelled'), and 'Action' (with three radio buttons: 'Approve' (selected), 'Reject', and 'Ignore'). At the bottom right, there are 'Done' and 'Cancel' buttons. A blue circle highlights the 'Approve' radio button.

Step 7b Click Done to finalized the change

This screenshot is identical to the previous one, showing the 'Approval' form with 'cancelled' in the comments and 'Approve' selected. In this version, a blue circle highlights the 'Done' button at the bottom right.

The RFQ lifecycle will be moved in Cancelled state



Version	11	Date:	28-Nov-2017
Status	Released		49

## RFQ13 Add additional Members to the RFQ

<b>Purpose</b>	Define users involved in RFQ process	<b>Status</b>	Define
<b>Stakeholders</b>	Quotation Manager		
<b>Beginning</b>	RFQ is in RFQ state		
<b>Interactions</b>	Quotation Manager has to define the users involved in RFQ process, both to define estimation activities (i.e. Engineer users) and to see and check RFQ information (i.e, people to provide or check budget information). Quotation Manager can add or remove users as RFQ member using Members tab functionalities.		
<b>End</b>	RFQ is visible to users involved in RFQ process		
<b>Constraints</b>			

The system adds to RFQ package a list of users, defined as Project Member. It means that they are able to upload documents and provide information but not to remove estimation tasks or modify access permission to RFQ package.

During RFQ creation, PLM adds automatically the users defined as tasks assignees in RFQ template (see chapter “Task assignees definition” in “PDPLS Manager” document). Following you find the functions used to define or update the RFQ members definition.

### Step 1 Select Members command from RFQ interface

This task is completed automatically by PLM during RFQ creation; the function can be used by Quotation Manager in order to update the member list from template definition. The function defines also the project role for each users, using the definition contained in the template.

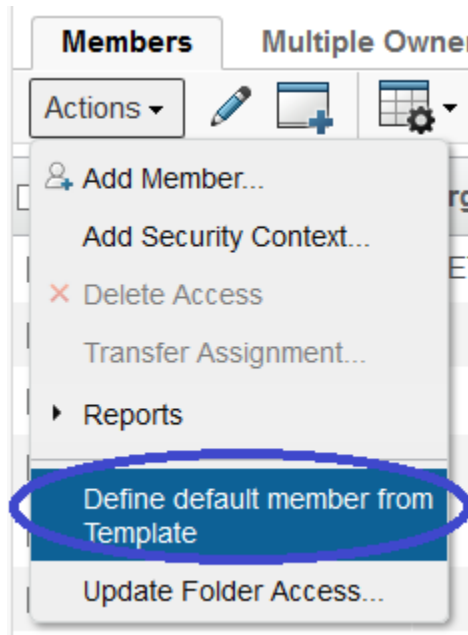
The screenshot shows the RFQ interface for RFQ-0000484-01. The 'Members' tab is selected, showing a list of 14 members. The table columns are: Member, Organization, Access, Project Role, and Comments. All members are listed as 'Project Member' with 'Multiple Ownership For Object' in the comments. The bottom right corner of the interface shows '29 objects'.

Member	Organization	Access	Project Role	Comments
<input type="checkbox"/>	METHODE ELEC..	Project Member		Multiple Ownership For Object
<input type="checkbox"/> Adam Lake		Project Lead		Multiple Ownership For Object
<input type="checkbox"/> Alexander Galea		Project Member		Multiple Ownership For Object
<input type="checkbox"/> Allen Carl Bonnici		Project Member	PDE Product Design Engineer	Multiple Ownership For Object
<input type="checkbox"/> Angelo Scerri		Project Member	TE Tooling Engineer	Multiple Ownership For Object
<input type="checkbox"/> Anthony Caruana		Project Member	ME Manufacturing Engineer	Multiple Ownership For Object
<input type="checkbox"/> Carmen Raduta		Project Member	PURCH Purchasing	Multiple Ownership For Object
<input type="checkbox"/> David Debono		Project Member	LM Launch Manager	Multiple Ownership For Object
<input type="checkbox"/> Edward Gingell		Project Member	LM Launch Manager	Multiple Ownership For Object
<input type="checkbox"/> Elias Moussa		Project Member	LM Launch Manager	Multiple Ownership For Object
<input type="checkbox"/> Evan Stringos		Project Member	PDE Product Design Engineer	Multiple Ownership For Object
<input type="checkbox"/> George Azzopardi		Project Member	LT Lab Technician	Multiple Ownership For Object
<input type="checkbox"/> Gregory Joslin		Project Lead		Multiple Ownership For Object

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Step 2 Click Define default members from Template command from Actions Menu



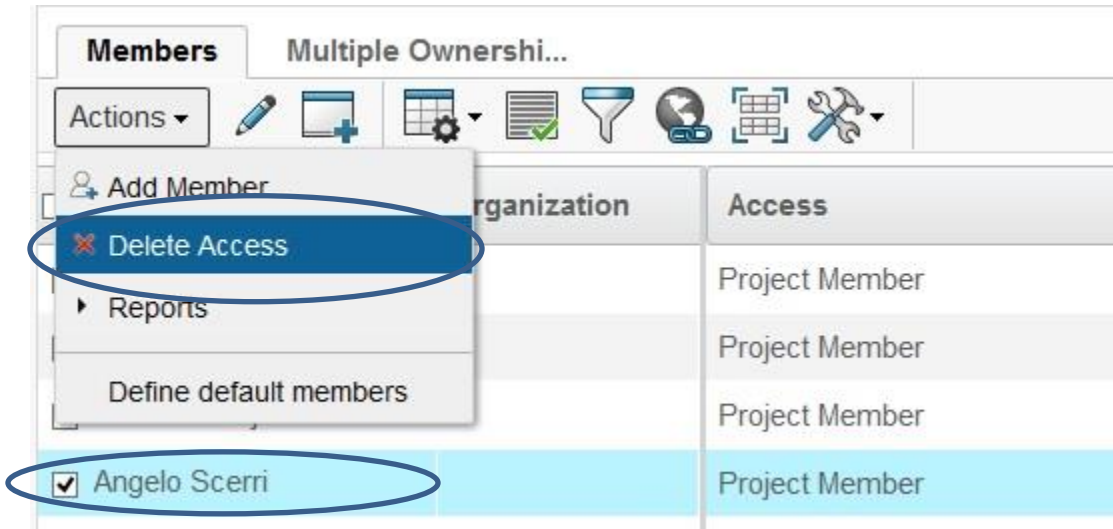
The default members list will be added as RFQ Members

Members					
Multiple Ownershi...					
Actions					
<input type="checkbox"/> Member	Organization	Access	Project Role	Comments	
<input type="checkbox"/> Alexander Galea		Project Member		Multiple Ownership	
<input type="checkbox"/> Allen Carl Bonnici Test		Project Member		Multiple Ownership	
<input type="checkbox"/> Anabel Cutajar		Project Member		Multiple Ownership	
<input type="checkbox"/> Angelo Scerri		Project Member		Multiple Ownership	
<input type="checkbox"/> Anthony Caruana		Project Member		Multiple Ownership	
<input type="checkbox"/> Giuseppe Loreto		Project Lead	Project Lead	Multiple Ownership	
<input type="checkbox"/> Gregory Joslin		Project Lead	Project Lead	Multiple Ownership	
<input type="checkbox"/> Johann Barbara		Project Member		Multiple Ownership	
<input type="checkbox"/> Kevin Borg		Project Lead		Multiple Ownership	
<input type="checkbox"/> Kevin Mifsud		Project Member		Multiple Ownership	

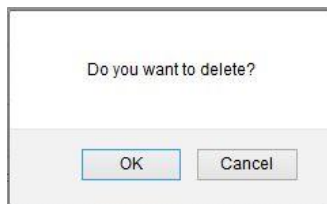
Version	11	Date:	28-Nov-2017
Status	Released		51

## To remove a Member from the Member list

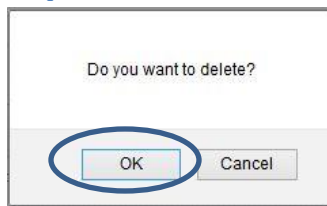
Step 1 Select the member to be removed and click Delete Access command from Actions menu



The following message will be shown



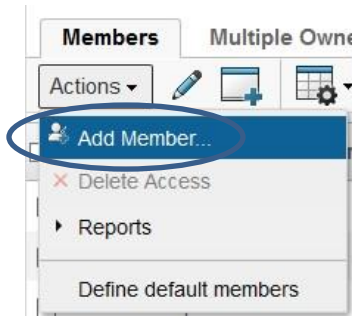
Step 2 Click OK to finalize the deletion



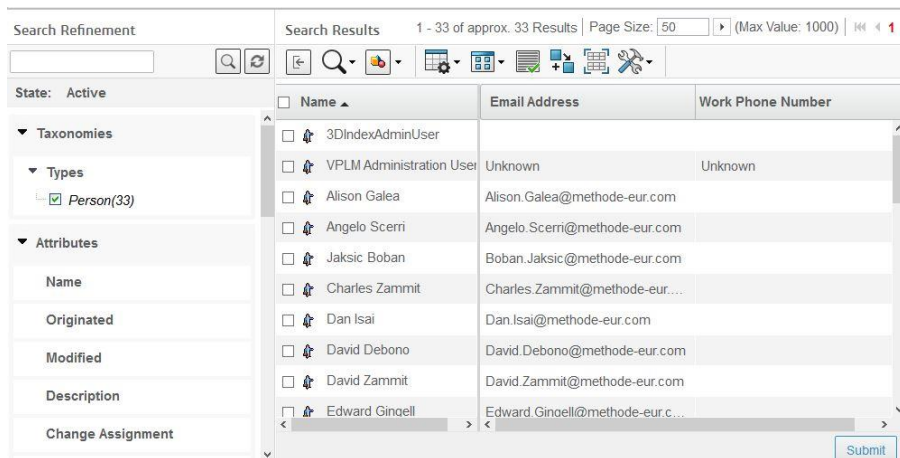
Version	11	Date:	28-Nov-2017
Status	Released		52

## To add a Member to the Member list

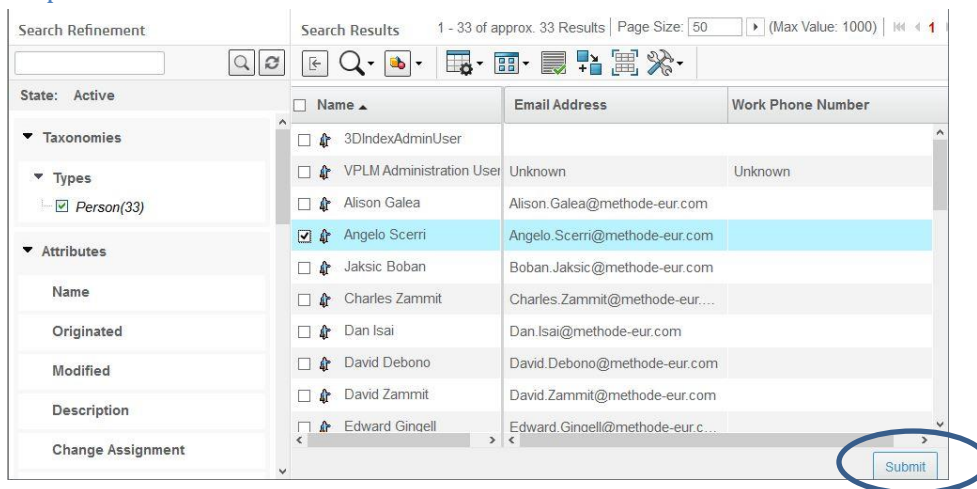
### Step 1 Click Add Member command from Actions menu



The full search page will be shown



### Step 2 Select the Members need to be added and click Submit command



The new members will be added to the list

Version	11	Date:	28-Nov-2017
Status	Released		53

## RFQ14 Folders definition

<b>Purpose</b>	Define folders used to upload documents used in RFQ process	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager or Quotation Manager		
<b>Beginning</b>	RFQ exists in state RFQ Opportunity or RFQ		
<b>Interactions</b>	During RFQ creation, some folders are automatically created from a template. Quotation Manager can define new folders specific for a RFQ, modify users permission to folders in order to define user accesses to folders		
<b>End</b>	RFQ contains several folders, that can be used by users involved in order to upload documents		
<b>Constraints</b>			

During RFQ creation, some folders are automatically created, from a default template.

Quotation Manager can create additional folders, related to a specific RFQ; also, can change users permission and accesses to folders

### Step 1 Select Folders tab

From the RFQ the Quotation Manager selects the Folders tab:

<div> <div>Actions ▾</div> <div>Edit ▾</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>											
<input type="checkbox"/> Name ▲			Drop	Drag	Type	Document Type	Title	Actions	Rev	Ver	Desc
<input type="checkbox"/> RFQ000005-01					Request for Q...						New
<input type="checkbox"/> Contract Documents					Workspace F...						Contr
<input type="checkbox"/> Customer Purchase Orders					Workspace F...						Custu
<input type="checkbox"/> Customer Quotation					Workspace F...						Custu
<input type="checkbox"/> Customer Specification					Workspace F...						Custu
<input type="checkbox"/> Design Specifications					Workspace F...						Desig
<input type="checkbox"/> PRF					Workspace F...						PRF
<input type="checkbox"/> Purchased Component Documents					Workspace F...						Purcl
<input type="checkbox"/> Score Card Documents					Workspace F...						Score



### Step 2 Actions menu contains commands to create, copy and remove folders

<div> <div>Actions ▾</div> <div>Edit ▾</div> <div></div> <div></div> </div> <div> <div>Folder Action</div> <div>Create...</div> <div>Copy...</div> <div>Content Report...</div> <div>Delete</div> <div>Create default folders</div> <div>Document/Files</div> <div>Bookmark</div> </div>
--


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## Folder creation


**RFQ000005-01 | Create New F...**



*Fields in red italics are required*

**Type**  
 

***Name***

**Policy**  
 

**Description**

***Inherit Access***  
☒ Yes  
☐ No

Apply

Done

Cancel

Step 3 Click on Folder name to view properties form contains attributes for users and sub-folder accesses

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**Design Specifications**  
Workspace Folder (...)

Design Specifications  
State : Exists  
Owner : kevinb  
Modified : 11/26/2015 2:16:20 PM

Design Specifications		
Discussions	Name	Design Specifications
<a href="#">Basic Information</a>	Policy	Workspace Vaults
Multiple Ownership Access	Description	Design Specifications
	Originator	William Galea
	Originated	Nov 26, 2015
	Inherit Access	Yes

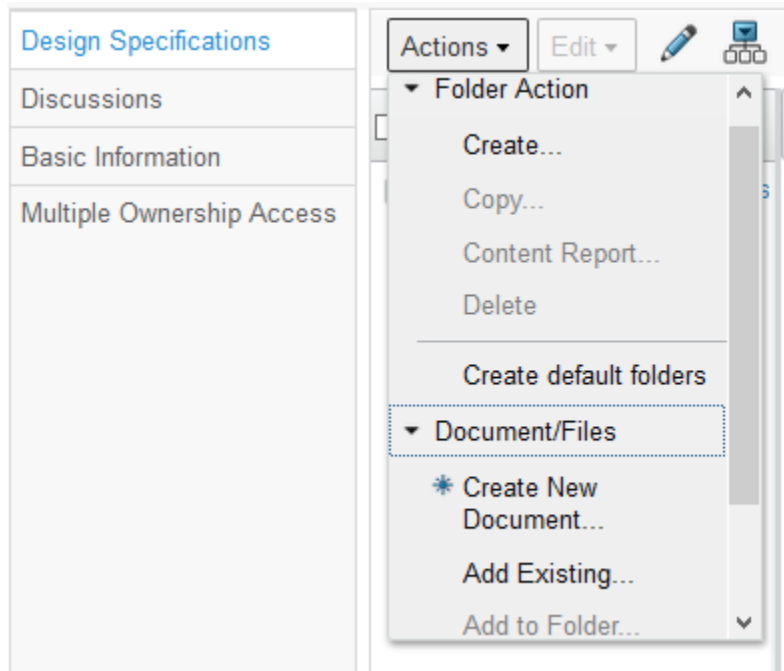
Step 4 Folders Categories menus contains commands to add users and modify users permissions; click hyperlink on folder name to open folder content

Design Specifications			
Discussions			
Basic Information			
<a href="#">Multiple Ownership Access</a>			

<input type="checkbox"/> Organization	Collaborative Space/User	Access
<input type="checkbox"/>	Alexander Galea	Basic
<input type="checkbox"/>	Allen Carl Bonnici Test	Basic
<input type="checkbox"/>	Anabel Cutajar	Read
<input type="checkbox"/>	Angelo Scerri	Read Write
<input type="checkbox"/>	Anthony Caruana	Add
<input type="checkbox"/>	Giuseppe Loreto	Remove
<input type="checkbox"/>	Gregory Joslin	Add Remove
<input type="checkbox"/>	Johann Barbara	Full
<input type="checkbox"/>	Kevin Borg	Project Member
<input type="checkbox"/>		Project Lead

Step 5 Folders Categories menus contains commands to add existing documents or create new documents

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Status	Released		57



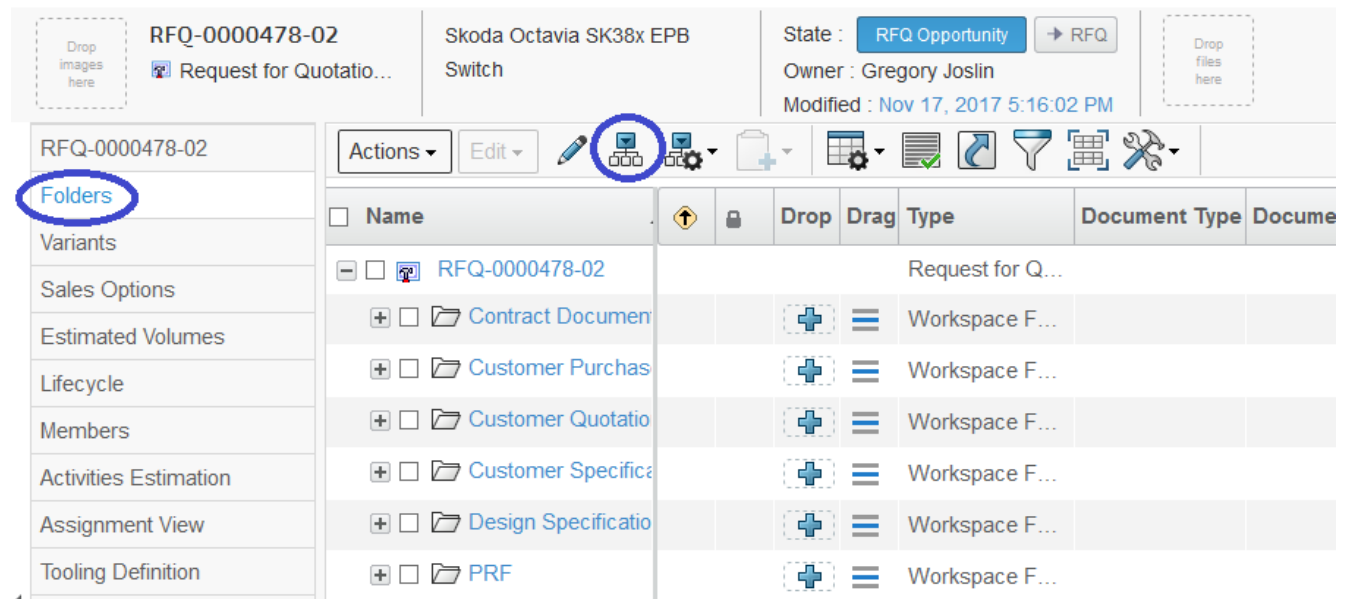
## Folders accesses definition and update

If a RFQ is created from a template, the folder access definition defined for the Template is copied to the RFQ (see chapter “Folders Accesses” in section “Project Template” of document “PDPLS Manager”). After the RFQ creation, the Quoting Manager can define the folder access definition for a specific RFQ.

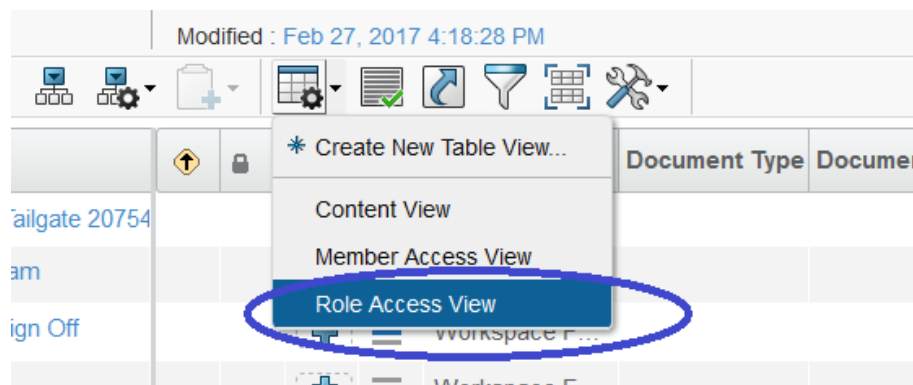
The approach is to define, for each folder at RFQ level, the access for each Project Role. Only the Quoting Manager can define the folder access definition. Once the folder accesses are defined, a dedicate function “Update Folder Access” can be used to apply the access to project members, using the Project Role information defined in the Project.

### Definition

After selecting the RFQ, from main menu, select the command Folders; in order to setup the access for all folders and sub-folders, select the icon to expand the view



A dedicated table “Role Access View” shows a grid with “Folder Name” and “Project Role”; from the toolbar, select the “filter table” icon and select “Role Access View”



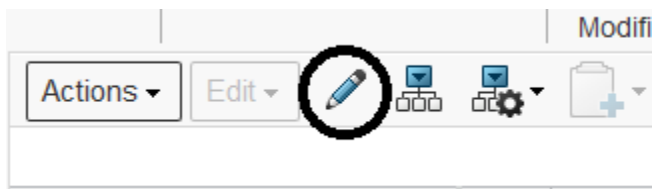
Version	11	Date:	28-Nov-2017
Status	Released		58

The grid will show all project roles defined, not only the ones defined at Project Template, because during project execution, the Project Lead can add project role not used at project template.

Project Role Access									
Name	Type	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analystist	CC Change Coordin	CS Customer Servic	Fin Finance
LM Ford C519 Tailg	Project Space	Johann B...			Read	Read	Read	Read	Read
01_Form Team	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
02_Phase Sign	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Gate 1	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Gate 2	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Gate 3	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Gate 4	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Gate 5	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
03_Open Issues	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
04_Customer In	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Contract_SO	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read
Letter of Inten	Workspace F...	Johann B...	Read	Yes	Read	Read	Read	Read	Read

Project Lead has to define, for each folder and for each Project Role, the access type.

- Select the Edit icon



- Select the Access type for each role

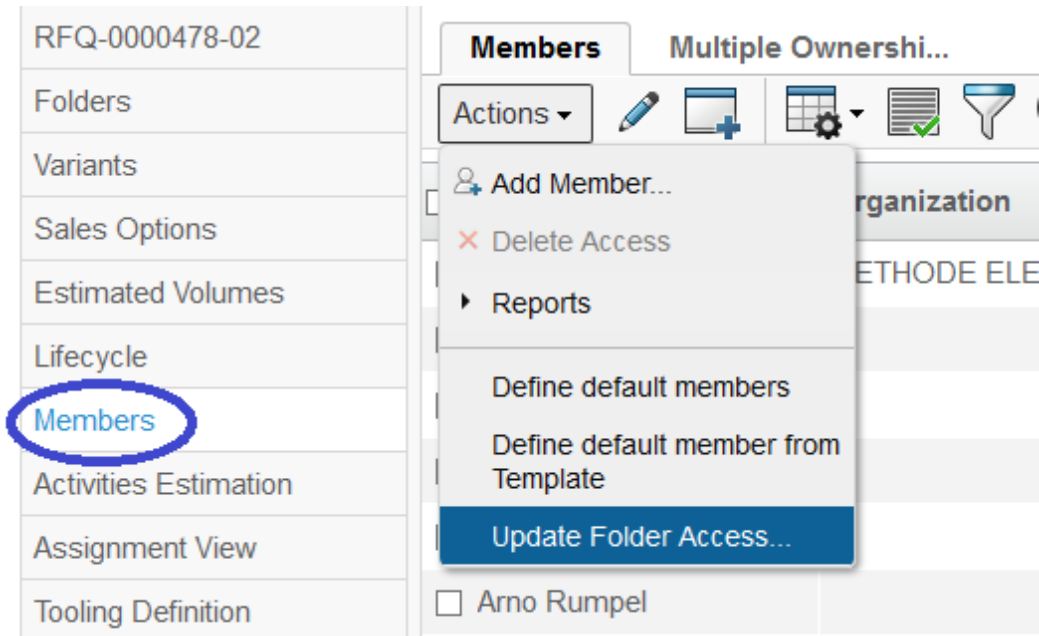
Project Role Access									
Name	Type	Owner	Default Us	Inherit	AM Account Manage	CA Cost Analystist	CC Chang		
RFQ-0000478-02	Request for Q...	Gregory J...			Read	Read	Read		
Contract Document	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		
Customer Purchas	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		
Customer Quotation	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		
Customer Specific	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		
Design Specificatio	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		
PRF	Workspace F...	Gregory J...	Add Re...	Yes	Read	Read	Read		

- Select Save when completed; the update can be executed several times

Version	11	Date:	28-Nov-2017
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## Apply the folder accesses to project members

The RFQ Members can be defined in several steps; the people involved in RFQ execution can also change during RFQ lifecycle or after RFQ revision. In order to update the Project Folder access definition accordingly to RFQ Members definition, a dedicate function “Update Folder Access” will be available in Member toolbar.



If a person, which was defined as a RFQ Member with a specific project Role, is removed from RFQ definition, the access permission will be removed only after the execution of function “Update Folder Access”.

The same behavior if the Project Role of a person is updated: the access permission will be updated only after the execution of function “Update Folder Access”.

Version	11	Date:	28-Nov-2017
Status	Released		60

## RFQ15 Assigning members to tasks for estimation

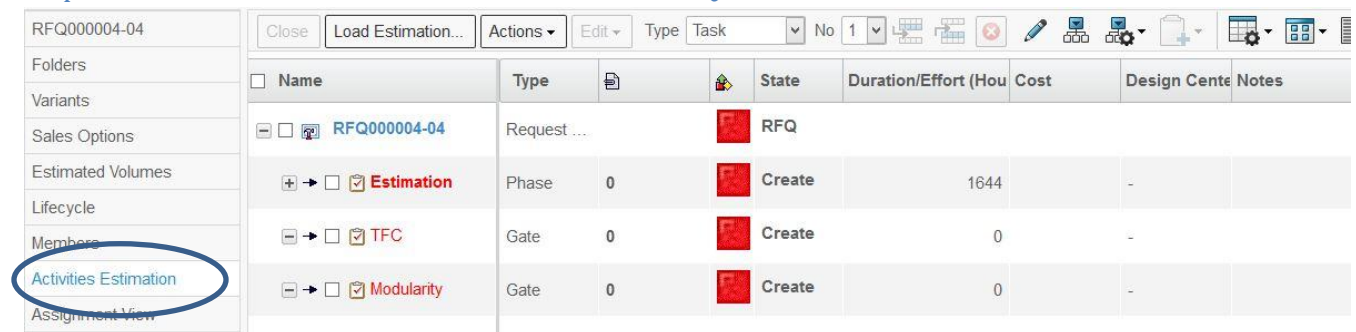
<b>Purpose</b>	Quotation Manager assigns members involved in RFQ in order to provide information and effort and cost estimates	<b>Status</b>	Define
<b>Stakeholders</b>	Quotation Manager		
<b>Beginning</b>	RFQ is in state RFQ		
<b>Interactions</b>	Quotation Manager has to assign each task to a user, in order to obtain information		
<b>End</b>	Quotation tasks have the status Assign		
<b>Constraints</b>			

After the RFQ creation, the RFQ package will contain the quotation activities, WBS (Work Breakdown Structure), definition, retrieved automatically from a template.

Before going on with the task assignment to RFQ members, the Quotation Manager, if required, is able to refine the WBS related to the specific RFQ.

### RFQ WBS Structure refinement

#### Step 1 Select Activities Estimation command from RFQ interface



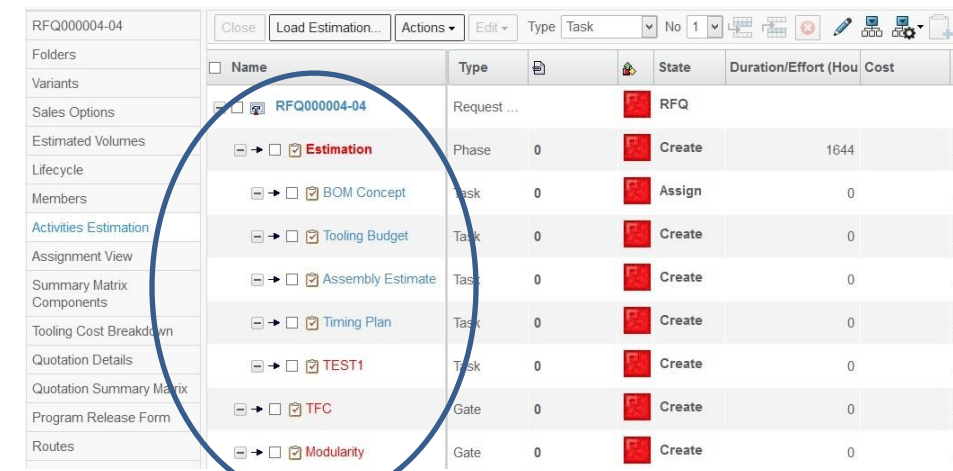
The screenshot shows the RFQ000004-04 interface. On the left sidebar, the 'Activities Estimation' menu item is circled. The main table displays the following data:

Name	Type	State	Duration/Effort (Hou)	Cost	Design Cents	Notes
RFQ000004-04	Request ...	RFQ				
Estimation	Phase	Create	1644		-	
TFC	Gate	Create		0	-	
Modularity	Gate	Create		0	-	

#### Step 2 Click the Expand All icon to expand all the WBS related to the RFQ



All the WBS will be expanded to enable the structure refinement in required



The screenshot shows the RFQ000004-04 interface with the WBS structure expanded. The 'Expand All' icon (a tree with a plus sign) is circled. The main table displays the following data:

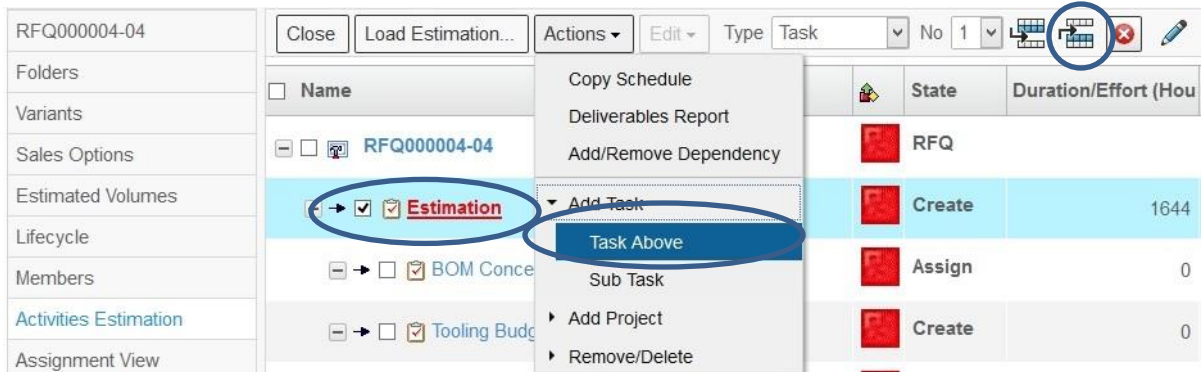
Name	Type	State	Duration/Effort (Hou)	Cost	D
RFQ000004-04	Request ...	RFQ			
Estimation	Phase	Create	1644		-
BOM Concept	Task	Assign		0	-
Tooling Budget	Task	Create		0	-
Assembly Estimate	Task	Create		0	-
Timing Plan	Task	Create		0	-
TEST1	Task	Create		0	-
TFC	Gate	Create		0	-
Modularity	Gate	Create		0	-

Version	11	Date:	28-Nov-2017
Status	Released		61

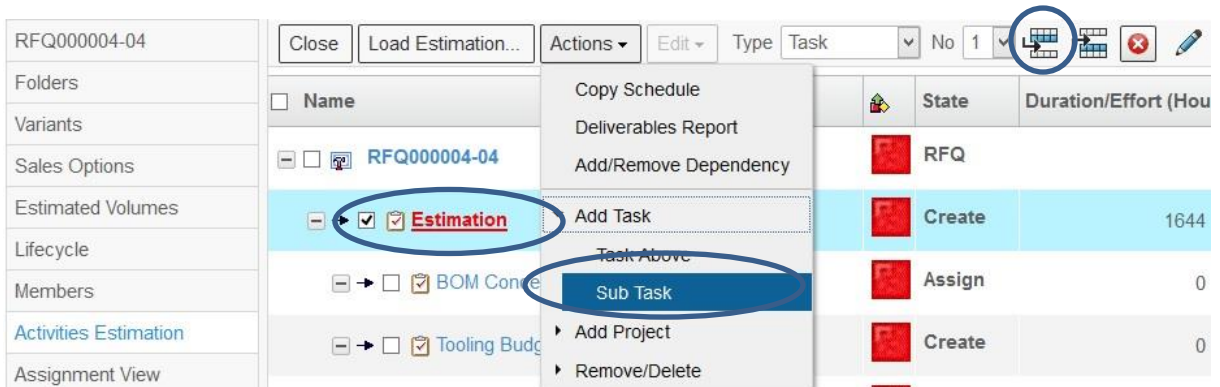
## To add a task

Step 3 Select the task from which the task addition functionality has to be started and then

- a) Click Task Above command from Actions menu or click the Task Above icon from the toolbar in order to add the new task at the same level and above the selected one



- b) Click Sub Task command from Actions menu or click the Sub Task icon from the toolbar in order to add the new task as child of the selected one



Version	11	Date:	28-Nov-2017
Status	Released		62

The Create Task page will be shown

The screenshot shows the 'Create Task' page. On the left is a sidebar with navigation options like 'Folders', 'Variants', 'Sales Options', etc. The main area displays a table of tasks. The right-hand panel, highlighted by a blue circle, contains the following fields:

- Type:** Task (dropdown)
- Name:** (text input) with an ☐ AutoName checkbox
- Description:** (text input)
- Duration:** 1 (text input) with a Days dropdown
- Policy:** Project Task (dropdown)
- Task Requirement:** Optional (dropdown)
- Project Role:** (text input)
- Constraint Type:** As Soon As Possible (dropdown)

At the bottom of the panel are 'Apply', 'Done', and 'Cancel' buttons.

Step 4 Fill in the Name and the Description and click Done

This is a close-up of the 'Create Task' form. Blue circles highlight the following elements:

- Name:** The text input field and the ☐ AutoName checkbox.
- Description:** The text input field.
- Done:** The 'Done' button at the bottom of the form.

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a) The task will be added above the selected one

RFQ000004-04

Close Load Estimation... Actions Edit Type Task No 1

Name	Type	State	Duration/Effort (Hou)	Cost	Design Cente	Notes
RFQ000004-04	Request ...	RFQ				
<input checked="" type="checkbox"/> Task Above	Task	Create	0		-	
<input checked="" type="checkbox"/> Estimation	Phase	Create	1644		-	
<input checked="" type="checkbox"/> BOM Concept	Task	Assign	0		-	
<input checked="" type="checkbox"/> Tooling Budget	Task	Create	0		-	
<input checked="" type="checkbox"/> Assembly Esti	Task	Create	0		-	
<input checked="" type="checkbox"/> Timing Plan	Task	Create	0		-	
<input checked="" type="checkbox"/> TEST1	Task	Create	0		-	
<input checked="" type="checkbox"/> Sub Task	Task	Create	0		-	
<input checked="" type="checkbox"/> TFC	Gate	Create	0		-	

b) The task will be added as last child of the selected one

RFQ000004-04

Close Load Estimation... Actions Edit Type Task No 1

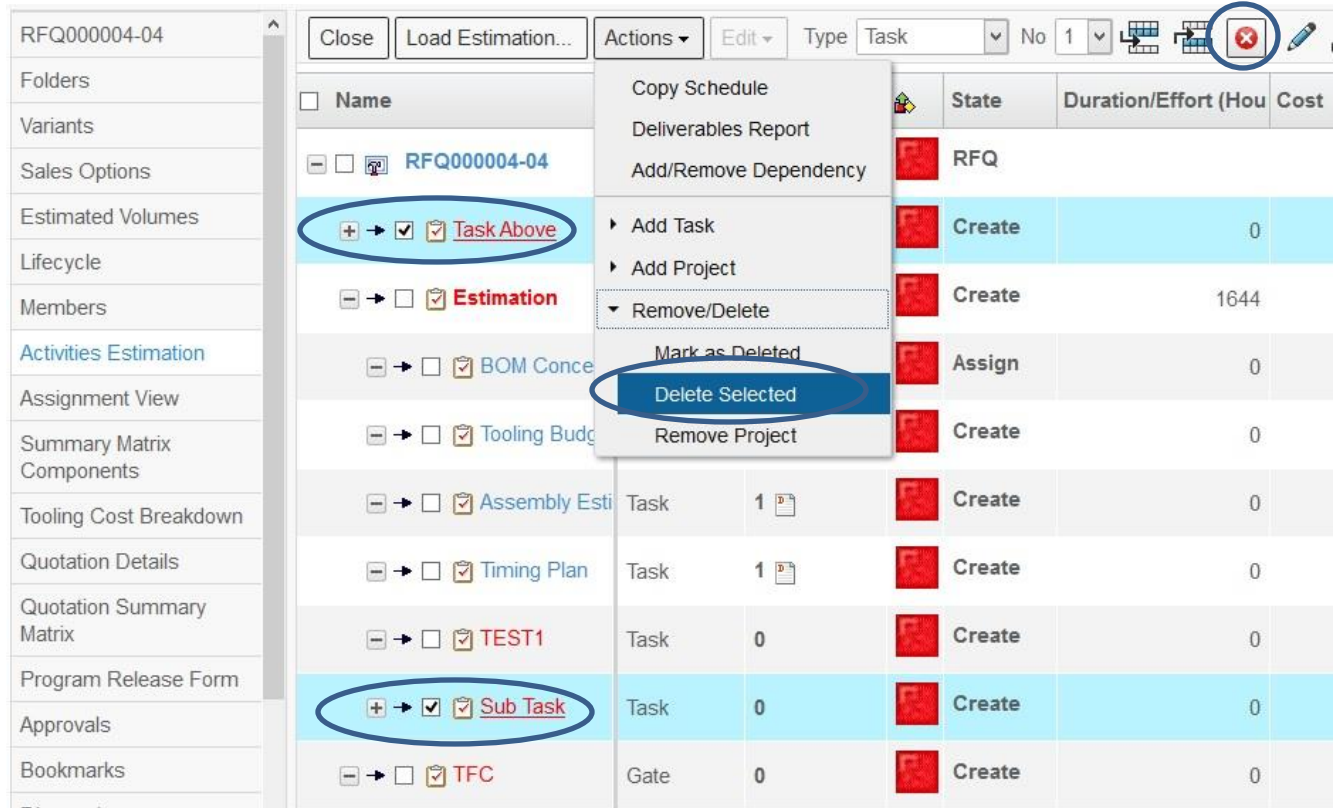
Name	Type	State	Duration/Effort (Hou)	Cost	Design Cente	Notes
RFQ000004-04	Request ...	RFQ				
<input checked="" type="checkbox"/> Task Above	Task	Create	0		-	
<input checked="" type="checkbox"/> Estimation	Phase	Create	1644		-	
<input checked="" type="checkbox"/> BOM Concept	Task	Assign	0		-	
<input checked="" type="checkbox"/> Tooling Budget	Task	Create	0		-	
<input checked="" type="checkbox"/> Assembly Esti	Task	Create	0		-	
<input checked="" type="checkbox"/> Timing Plan	Task	Create	0		-	
<input checked="" type="checkbox"/> TEST1	Task	Create	0		-	
<input checked="" type="checkbox"/> Sub Task	Task	Create	0		-	
<input checked="" type="checkbox"/> TFC	Gate	Create	0		-	

Version	11	Date:	28-Nov-2017
Status	Released		64

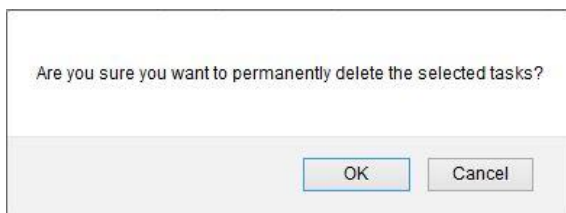


## To remove a task

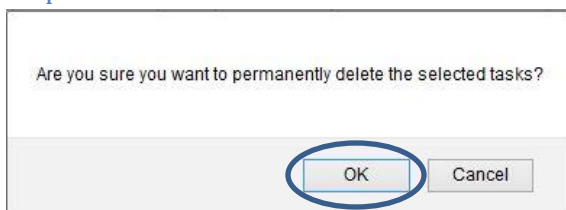
Step 5 Select the task (the multiple selection is enabled) to be removed and click Delete Selected command from Actions menu or click the Delete Selected icon from the toolbar



The following message will be shown



Step 6 Click OK to finalize the deletion



The selected Task will be removed from the WBS

Version	11	Date:	28-Nov-2017
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## Activities Assignment

### Step 1 Select Assignment View command from RFQ interface

The screenshot shows the RFQ000004-04 interface. On the left sidebar, the 'Assignment View' option is highlighted with a blue circle. The main table displays the following data:

Name	Type	%	Progress	Duration	End Date	Owner
RFQ000004-04	Request ...	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
Estimation	Phase	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
TFC	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
Modularity	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg

The 'Project Members Assignment' section on the right shows four members: Kevin BORG, Anthony CARUANA, William GALEA, and Gregory JOSLIN.

### Step 2 Click the Expand All icon to expand all the WBS related to the RFQ



All the WBS will be expanded to enable the task assignment to each member

The screenshot shows the RFQ000004-04 interface with the 'Assignment View' selected. The 'Estimation' task is expanded, showing its sub-tasks. The 'Expand All' icon in the toolbar is circled in blue. The main table displays the following data:

Name	Type	%	Progress	Duration	End Date	Owner
RFQ000004-04	Request ...	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
Estimation	Phase	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
BOM Concept	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
Tooling Budget	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
Assembly Esti	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
Timing Plan	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
TFC	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
Modularity	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg

The 'Project Members Assignment' section on the right shows three members: Kevin BORG, Anthony CARUANA, and William GALEA.

Version	11	Date:	28-Nov-2017
Status	Released		66

## To assign a member to a task

Step 3a Move the mouse over the cell related to the intersection between task and member to be assigned

The screenshot shows the 'Assignment View' for RFQ000004-04. The left sidebar lists various project components, with 'Assignment View' selected. The main table displays tasks and their estimated values. The 'BOM Concept' task is highlighted. To the right, the 'Project Members Assignment' table shows three members: Kevin BORG, Anthony CARUANA, and William GALEA. The 'Assign' button is highlighted with a blue circle.

Estimated								Project Members Assignment		
Name	Type	%	Progress	Duration	End Date	Owner				
RFQ000004-04	Request ...	0.0		0.0 Days	Dec 11, 2...	Kevin Borg				
Estimation	Phase	0.0		0.0 Days	Dec 11, 2...	Kevin Borg				
BOM Concept	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg		Assign		
Tooling Budget	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Assembly Esti	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Timing Plan	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
TFC	Gate	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Modularity	Gate	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				

The cell will be highlighted in green

Step 4a Click the left button of the mouse to finalized the assignment

The screenshot shows the 'Assignment View' for RFQ000004-04. The 'BOM Concept' task is highlighted. In the 'Project Members Assignment' table, the 'Assigned' button is highlighted with a blue circle.

Estimated								Project Members Assignment		
Name	Type	%	Progress	Duration	End Date	Owner				
RFQ000004-04	Request ...	0.0		0.0 Days	Dec 11, 2...	Kevin Borg				
Estimation	Phase	0.0		0.0 Days	Dec 11, 2...	Kevin Borg				
BOM Concept	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg		Assigned		
Tooling Budget	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Assembly Esti	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Timing Plan	Task	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
TFC	Gate	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				
Modularity	Gate	0.0		0.0 Hours	Dec 11, 2...	Kevin Borg				

The cell will be highlighted in grey

Version	11	Date:	28-Nov-2017
Status	Released		67

### To unassign a member from a task

Step 3b Move the mouse over the cell related to the intersection between task and member to be unassigned

RFQ000004-04

Folders

Variants

Sales Options

Estimated Volumes

Lifecycle

Members

Activities Estimation

Assignment View

Summary Matrix Components

Tooling Cost Breakdown

Quotation Details

Quotation Summary Matrix

Close

Load Estimation...

Actions ▾

Edit ▾

Type Task ▾

No 1 ▾

Estimated

Project Members Assignment

<input type="checkbox"/> Name	Type	%	Progress	Duration	End Date	Owner	 Kevin BORG	 Anthony CARUANA	 William GALEA
RFQ000004-04	Request ...	0.0	<div></div>	0.0 Days	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> Estimation	Phase	0.0	<div></div>	0.0 Days	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> BOM Concept	Task	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> Tooling Budget	Task	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> Assembly Esti	Task	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> Timing Plan	Task	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> TFC	Gate	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			
→ <input checked="" type="checkbox"/> Modularity	Gate	0.0	<div></div>	0.0 Hours	Dec 11, 2...	Kevin Borg			

Unassign

The cell will be highlighted in red

Step 4b Click the left button of the mouse to finalized the unassignment

RFQ000004-04	<div>CloseLoad Estimation...ActionsEditTypeTaskNo1</div>										<div></div>									
Folders	Estimated										Project Members Assignment									
Variants																				
Sales Options																				
Estimated Volumes																				
Lifecycle																				
Members																				
Activities Estimation																				
Assignment View																				
Summary Matrix																				
Components																				
Tooling Cost Breakdown																				
Quotation Details																				
Quotation Summary Matrix																				

<input type="checkbox"/>	Name	Type	%	Progress	Duration	End Date	Owner
	RFQ000004-04	Request ...	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
	<b>Estimation</b>	Phase	0.0	<input type="text"/>	0.0 Days	Dec 11, 2...	Kevin Borg
	<b>BOM Concept</b>	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
	<b>Tooling Budget</b>	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
	<b>Assembly Esti</b>	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
	<b>Timing Plan</b>	Task	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
	<b>TFC</b>	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg
	<b>Modularity</b>	Gate	0.0	<input type="text"/>	0.0 Hours	Dec 11, 2...	Kevin Borg

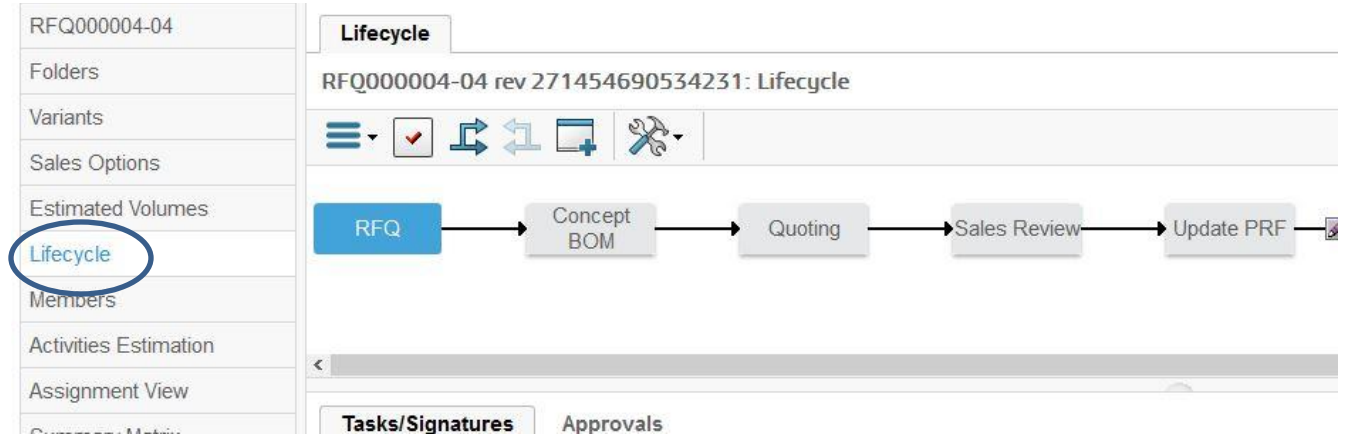
The cell will be cleared

Version	11	Date:	28-Nov-2017	
Status	Released			68

## Move the RFQ lifecycle to Concept BOM state to start the Estimation Phase in charge of assigned members

### From lifecycle interface

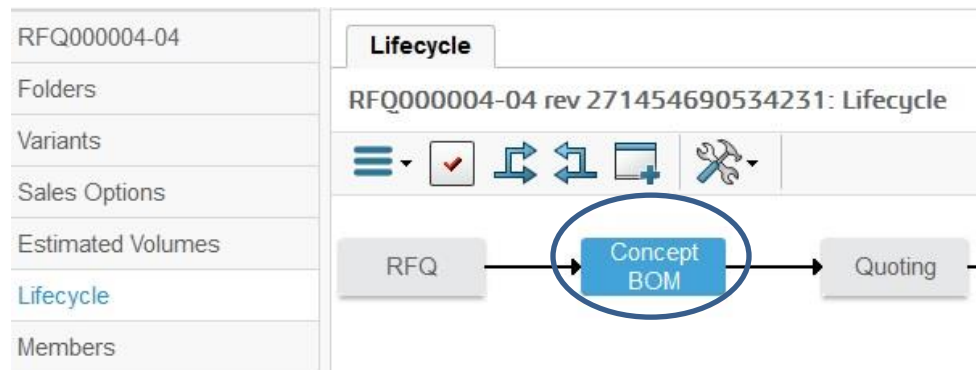
Step 1a Select Lifecycle command from RFQ interface



Step 2a Click the Promote icon to promote the lifecycle



The lifecycle will be moved to Concept BOM state




Version	11	Date:	28-Nov-2017
Status	Released		69





## From RFQ interface

Step 1b Click the Concept BOM state tab from RFQ upper page




**RFQ000004-04**  
 Request for Quotatio...

New RFQ test  
 State : **RFQ** → **Concept BOM**  
 Owner : kevinb  
 Modified : Mar 15, 2016 6:30:49 PM



<b>RFQ000004-04</b>	 			
<b>Folders</b>	<b>Details</b>			
<b>Variants</b>	Issue Date	Feb 5, 2016	Due Date	Dec 11, 2015
<b>Sales Options</b>	Customer Name	FCA	Customer Documentation Reference	X152-EPB-ROOF-SPEC-v
<b>Estimated Volumes</b>	Program/Platform #	X152	Vehicle Model Year	2017MY
<b>Lifecycle</b>	Customer Part #	FCA 1234	Part Description	Switches
<b>Members</b>	Current Price	0.0 Dollar	Target Price	0.0 Dollar
<b>Activities Estimation</b>	Quotation Currency	Euro	Quotation Description	New RFQ test
<b>Assignment View</b>	Quote Type	New Product	Quote Level	Engineering Estimate
<b>Summary Matrix Components</b>	Program Lifetime	5	Start of Production	Jan 1, 2017

The lifecycle will be moved to Concept BOM state



**RFQ000004-04**  
 Request for Quotatio...

New RFQ test  
 RFQ ← **Concept BOM** → Quoting  
 Owner : kevinb  
 Modified : Mar 15, 2016 6:30:49 PM

<b>RFQ000004-04</b>	 	
<b>Folders</b>	<b>Details</b>	
<b>Variants</b>	Issue Date	Feb 5, 2016
<b>Sales Options</b>	Customer Name	FCA

Version	11	Date:	28-Nov-2017
Status	Released		70

## RFQ16 CBOMs creation and management

<b>Purpose</b>	Engineer Manager defines CBOMs related to new variants or updates CBOM related to existing variants	<b>Status</b>	Define
<b>Stakeholders</b>	Engineer Managers		
<b>Beginning</b>	RFQ has variants and has moved to status “Concept BOM”		
<b>Interactions</b>	Engineer Managers have to complete CBOM definition related to variants contained in RFQ. Manager can add Sketch parts or existing parts, completes Technical information, compare CBOM		
<b>End</b>	CBOMs are completed		
<b>Constraints</b>			

Quotation Manager promotes the RFQ package to the state "Concept BOM"; user assigned to complete the CBOM in RFQ package receives a notification task dashboard.

Step 1 Select Home command, select Tasks tab, select hyperlink related to RFQ name

Collaboration and Approvals

Home Change Management User

Home Engineering User

Home Project User

Home

Issues Summary

Shortcuts...

Collections

Tasks

Subscriptions

Meetings

My Calendar

Decisions

Discussions

Tasks

Approval Tasks

Projects

Issues

Approval Issues

My Calendar

Tasks

Filter: Assigned Tasks

Name

Change in led colour

Tool design reviews

TFC

Tweaking of resistance

BOM Concept

BOM Concept

Lab Testing and Equipment

Modification of PCB size/design

Slip Days

8

3

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

0

State

Review

Review

Review

Review

Assign

Review

Assign

Assign

% Complete

100

100

100

100

50

Project

CN 0000166

Tool1

RFQ000001-01

CN 0000166

RFQ000005-01

RFQ000004-01

RFQ000004-01

CN 0000166

Est S

Nov

Oct

Nov

Dec












Dec

Dec

Dec

Dec

## Step 2 Select Variants command

RFQ000005-01	          			
Folders				
Variants				
Sales Options				
Estimated Volumes				
Lifecycle				
Members				

Version	11	Date:	28-Nov-2017
Status	Released		71



### Step 3 For each variant, select part number from table and select Bill of Material command

Drop images here

0000000052

Part (A)

Din Bajo = Base Variant +  
Round Terminals + Analog  
Output + Protection to 5.5

State : Create Peer Review  
Owner : Test Everything  
Modified : 5/11/2015 11:16:02 AM

Drop files here

0000000052 A

Bill Of Materials

Equivalents

Change Management

Specs & Documents

Related Parts

Collaboration

Multiple Ownership Access

Manufacturing Details

Customer Supplier Part N...

Technical Notes

CMS Information

EBOM

EBOM Common

MBOM Plant Specif...

Where Used

Markups

Reports

Markup

Change

Name	Type	State	Rev	F/N	Qty	U of M	Description
<input type="checkbox"/> 0000000052	Sketch Part	Create	A			EA (...)	Din Bajo = Base Variant + Round .

### Step 4 From Action menu, select commands to create or update CBOM

Select Create Sketch Part command to add new sketch parts

EBOM

EBOM Common

MBOM P

Reports

Create Sketch Parts...

Add Existing

Import EBOM...

Copy From

Copy To

Resequence

Change Position...

Replace with Existing

Remove

Type	S
Sketch Part	C

Version	11	Date:	28-Nov-2017
Status	Released		72

meth2015.gruppocdm.it:8080/enovia/common/emxCreate.jsp?nameField=autoName&policy=policy\_DevelopmentPart&showPol

0000000052|Create Part

Fields in red italics are required

Type: Part

*AutoName Series*: Part Number

Number of Parts: 5

Done Cancel

Select Add Existing command to add existing parts

Search Refinement Search Results Results: 100, 3 selected

Search

☒ Case Sensitive

Limit to 100 results

Type: Part

Name

Revision

Policy: EC Part

State

Originated

Name	Rev	Type	Description	State
0000000004	1	Part		Preliminary
16297	1	Part	PCB Assy EPB with Alps-...	Preliminary
16298	1	Part	PCB-Assy Roof with Alps-...	Preliminary
<input checked="" type="checkbox"/> 16401	1	Part	PCB	Preliminary
<input checked="" type="checkbox"/> 30608	1	Part	Roller	Preliminary
40757	1	Part	Main Spring	Preliminary
<input checked="" type="checkbox"/> 40768	1	Part	Plunger Spring	Preliminary
40819	1	Part	indexing Spring	Preliminary
453050	1	Part	BRAKE DUAL CCT SW - ...	Preliminary
453051	1	Part	BRAKE DUAL CCT SW - ...	Preliminary
52581	1	Part	Plug	Preliminary
52819	1	Part	Plunger	Preliminary

Done Cancel

CBOM can contain Sketch Part (type "Sketch Part") and definitive Part Number (type "EC Part")

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Status	Released		73

EBOM		EBOM Common		MBOM Plant Specif...		Where Used		Markups	
<div><div></div><div>Reports</div></div>		<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>	<div><div></div><div></div></div>
Name	Type	State	Rev	F/N	Qty	U of M	Description	Weight	
<div><div></div><div></div><div>0000000052</div></div>	Sketch Part	Create	A			EA (...)	Din Bajo = Base Variant + ...	0.0 g	
<div><div></div><div></div><div>0000000056</div></div>	Sketch Part	Create	A	10	1.0	EA (...)		0.0 g	
<div><div></div><div></div><div>0000000057</div></div>	Sketch Part	Create	A	20	1.0	EA (...)		0.0 g	
<div><div></div><div></div><div>0000000058</div></div>	Sketch Part	Create	A	30	1.0	EA (...)		0.0 g	
<div><div></div><div></div><div>0000000059</div></div>	Sketch Part	Create	A	40	1.0	EA (...)		0.0 g	
<div><div></div><div></div><div>0000000060</div></div>	Sketch Part	Create	A	50	1.0	EA (...)		0.0 g	
<div><div></div><div></div><div>16401</div></div>	EC Part	Released	1	60	1.0	EA (...)	PCB	1.8 g	
<div><div></div><div></div><div>30608</div></div>	EC Part	Released	1	70	1.0	EA (...)	Roller	0.2 g	
<div><div></div><div></div><div>40768</div></div>	EC Part	Released	1	80	1.0	EA (...)	Plunger Spring	0.0 g	

### Step 3 For each variant, complete CBOM information

Complete CBOM information using Edit command

EBOM

EBOM Common

MBOM Plant Specif...

Where Used
















Markups

Reports

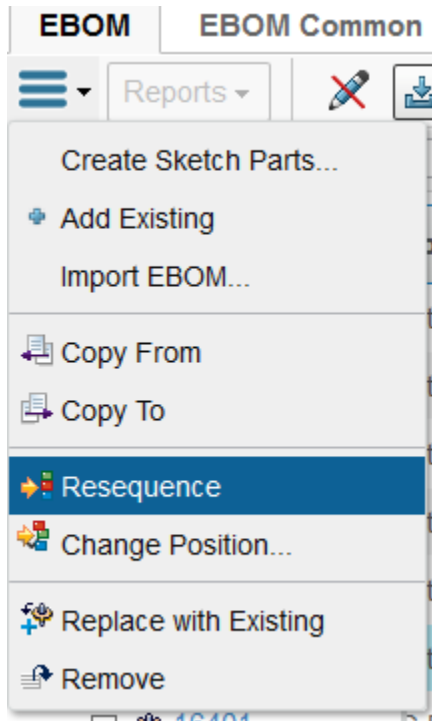
Mass Update

Save

Res

Name	type	State	Rev	F/N	Qty	U of M	Description	Weight	Part Weight Gross / (grams)
  0000000052	etch Part	Create	A			EA (...)	Din Bajo = Base Variant + ...	0.0 g	0.0 g
  0000000056	etch Part	Create	A	10	1.0	EA (...)	<b>Housing</b>	0.0 g	0.0 g
  0000000057	etch Part	Create	A	20	1.0	EA (...)	<b>Indexing</b>	0.0 g	0.0 g
  0000000058	etch Part	Create	A	30	1.0	EA (...)	<b>Toggle</b>	0.0 g	0.0 g
  0000000059	etch Part	Create	A	40	1.0	EA (...)	<b>Socket</b>	0.0 g	0.0 g
  0000000060	etch Part	Create	A	50	1.0	EA (...)	<b>Slider</b>	0.0 g	0.0 g
 16401	C Part	Released	1	60	1.0	EA (...)	PCB	1.8 g	0.0 g
 30608	C Part	Released	1	70	1.0	EA (...)	Roller	0.2 g	0.0 g
 40768	C Part	Released	1	80	1.0	EA (...)	Plunger Spring	0.0 g	0.0 g

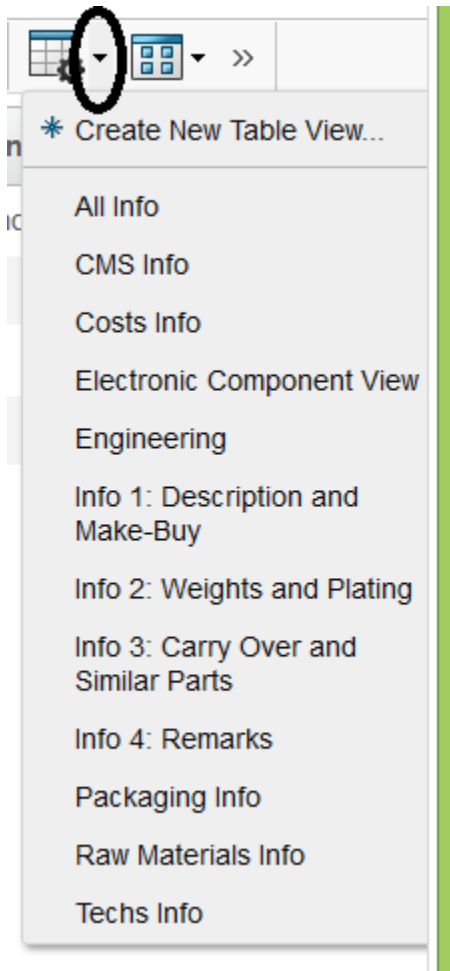
Version	11	Date:	28-Nov-2017
Status	Released		74



Select icon Edit, open Action menu

- Resequence: update Find Number field for all components contained in CBOM
- Change Position: swap find numbers for two components
- Replace with Existing: replace a component with an existing component
- Remove: remove a component from a CBOM (component is removed only from CBOM, still exists in PLM)
- Copy From: copy Bill of Material (or a portion) from another part number
- Copy To: copy Bill of Material (or a portion) to another part number with empty BOM

Version	11	Date:	28-Nov-2017
Status	Released		75



Select icon Customize, open Table View menu

- Info 1, Info 2, Info 3, Info 4: table with Tech information splitted in order to avoid “scroll”
- Techs Info: table with all technical information
- Electronic Component View: table with information used for electronic BOM
- Packaging Info: table with information used for packaging BOM
- Raw Material Info: table with information used for MBOM rules
- Costs Info: table with estimated costs for components
- CMS Info: table with CMS mandatory information

Version	11	Date:	28-Nov-2017
Status	Released		76

## RFQ17 CBOM definition with Summary Matrix Component

<b>Purpose</b>	Engineer Manager defines CBOMs related to new variants or updates CBOM related to existing variants.	<b>Status</b>	Define
<b>Stakeholders</b>	Engineer Managers		
<b>Beginning</b>	RFQ has variants defined		
<b>Interactions</b>	Engineer Managers have to complete CBOM definition related to variants contained in RFQ. Manager can add Sketch parts or existing parts, completes Technical information, compare CBOM		
<b>End</b>	CBOMs are completed		
<b>Constraints</b>			

Quotation Manager promotes the RFQ package to the state "Concept BOM"; user assigned to complete the CBOM in RFQ package receives a notification task dashboard.

Step 1 Select Home command, select Tasks tab, select hyperlink related to RFQ name

The screenshot shows the PowerView interface. On the left sidebar, the 'Home' button is circled. The main area has tabs: 'Tasks' (circled), 'Issues', 'Approval Tasks', 'Approval Issues', 'Projects', 'My Calendar', and 'Messages'. Below the tabs, there's a 'Tasks' section with a 'Filter: Assigned Tasks' dropdown. A table displays task details:

Name	Slip Days	State	% Complete	Project
<input type="checkbox"/> BOM Concept	133	Assign		<a href="#">RFQ-0000002-06</a>
<input type="checkbox"/> Engineering Mechanical Reso	133	Assign		<a href="#">RFQ-0000002-06</a>
<input type="checkbox"/> Engineering Mechanical Reso	133	Active		<a href="#">RFQ-0000002-01</a>

Version	11	Date:	28-Nov-2017
Status	Released		77

## Step 2 Select command Components Summary Matrix

Drop images here

RFQ-0000002-06

Request for Quotatio...

C519 ITM - With CAM (EC3)

State : RFQ ← Concept BOM → Quoting

Owner : daniel.eifler

Modified : Dec 1, 2016 6:05:03 PM

Drop files here

RFQ-0000002-06

Folders

Variants

Sales Options

Estimated Volumes

Lifecycle

Members

Activities Estimation

Assignment View

**Components Summary Matrix**

Tooling Definition

Tooling Cost Breakdown

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<input type="checkbox"/>	Name	Description	Variants	Type	PLM State	Rev	U of M	Net We	Uo
<input type="checkbox"/>	RFQ-0000002-06	C519 ITM - With CAM (EC3)	<div>00000304 Tailgate module without</div> <div>00000295 Tailgate module with ca</div> <div>* +</div> <div>* +</div>	Request for Quotation	Concept BOM	314	...		

The table shows a grid with all components contained in all variants, related to RFQ selected.

<input type="checkbox"/>	Name	Description	variants		Type	PLM State	Rev	U of M	Net Weight (kg)	Part Weight (kg)	Design/Purchase	Estimated Cost	Material Description	Methods/Material Numbers	Painting Materials	Painting Materials	Name	Description	Similar Parts	Carry Over Parts
<input type="checkbox"/>	RFQ-0000119-01	dfgr	<div>W01001</div> <div>W01002</div> <div>W01003</div> <div>W01004</div> <div>W01005</div>	Request for Quotation	Concept		112										RFQ-0000119-01	dfgr		
<input type="checkbox"/>	00013745	housing	<div>W01018</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar	Material 1: 000108 (CUPRE-HAN BAY 30 - REC) Q1: Percentage Thickness: 12 Material 2: 000108 (GREEN TRANSPARENT COLOUR) Q2: Percentage Thickness: 12 Material 3: 000108 (KAWADOLCH 2407 REC 000000) Q3: Percentage Thickness: 12			00013745	housing			
<input type="checkbox"/>	00013755	index	<div>W01019</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013755	index	test	
<input type="checkbox"/>	00013765		<div>W01018</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013765			
<input type="checkbox"/>	00013844		<div>W01019</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013844			
<input type="checkbox"/>	00013854		<div>W01019</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013854			
<input type="checkbox"/>	00013953		<div>W01019</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013953			
<input type="checkbox"/>	00013963		<div>W01018</div>		Part	Create	A	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					00013963			
<input type="checkbox"/>	52581	PLUG	<div>W01019</div>		Part	Release	01	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					52581	PLUG		
<input type="checkbox"/>	52519	PLUNGER - BRAKE	<div>W01019</div>		Part	Release	02	PCS - PIECES	0.0	0.0	Design	0.0 Dollar					52519	PLUNGER - BRAKE		

- The table contains all technical information; the column Name and Description are repeated also closed to "Part Material" icon to help the user to recognize the components related

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<input type="checkbox"/>	Name	Description	Variants
<input type="checkbox"/>	RFQ-0000119-01	dfgr	
<input type="checkbox"/>	00013745	Housing	

Painting Materials	Name	Description	Similar Parts	Carry Over Parts	Remarks
	00013745	Housing			test1

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- The first record in the table contains the RFQ number and the variants list. If the variant EBOMs contains sub-components, they are shown starting from the second row.

<input type="checkbox"/>	Name	Description	Variants
<input type="checkbox"/>	RFQ-0000119-01	otger	<div>00013943</div> <div> </div>
			<div> </div>

- If the sub-components are present, the column Variants contains the icons used to manage the CBOMs

Variants					Typ
00013943	00013293 variant 3	00013174 variant 2	453050 BRAKE DUAL CCT 2	00013164 variant 1	Ro to Q
	 qty:21.0				P:
	 qty:1.0				P:

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## Variants list

The column Variants contains different information for the first record compared to other records: the first record contains one cell for each variant with icons used to add new parts or existing parts to CBOM

00000304 Tailgate module without	00000295 Tailgate module with ca
 	 

Each cell contains:

- an header with variant part number and description
- an icon used to create new parts in the variant CBOM
- an icon used to add existing parts in the variant CBOM

00000304  
Tailgate module without














## Components list

Starting from second record, the column Variants contains icons used to manage the related component in different CBOMs.

The color cell is different if part is contained in CBOM or not contained:

- if part is not contained in the CBOM (for example, variant 00013943) the color cell is white
- if part is contained in the CBOM (for example, variant 00013293) the color cell is cyan

		00013943	00013293 variant 3
		 	 
 RFQ-0000119-01	dfgdf		
 00013745	Housing	 	  qty:21.0 

Also the content of the cell is different if part is contained in CBOM or not contained:

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- if part is not contained in the CBOM (for example, variant 00013943) the cell contains the following icons

- an icon used to create new parts copying the selected part



- an icon used to add the selected part to variant CBOM



- if part is contained in the CBOM (for example, variant 00013293) the cell contains the following icons

- an icon used to create new parts copying the selected part



- an icon used to add the selected part to variant CBOM




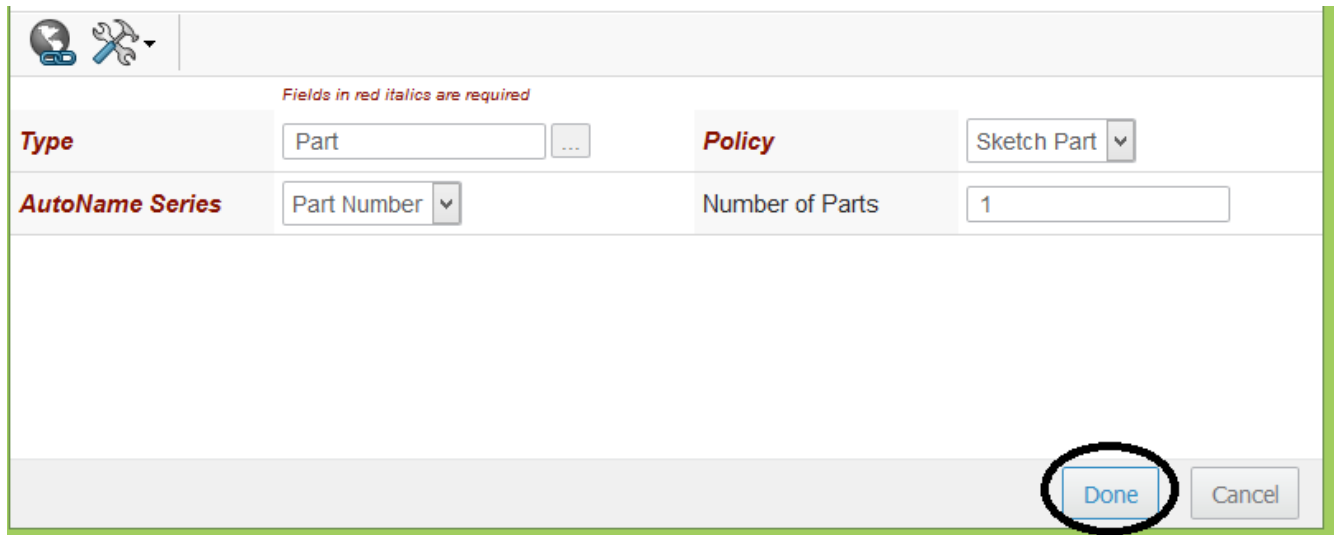
- the quantity of the component in the CBOM and an icon to edit




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## Create New Components

The user has to select the icon Create New  in the cell related to variant CBOM has to be updated; the user has to complete the form and select Done




After part creation, the user has to refresh the table using the icon  (the table is not updated automatically)

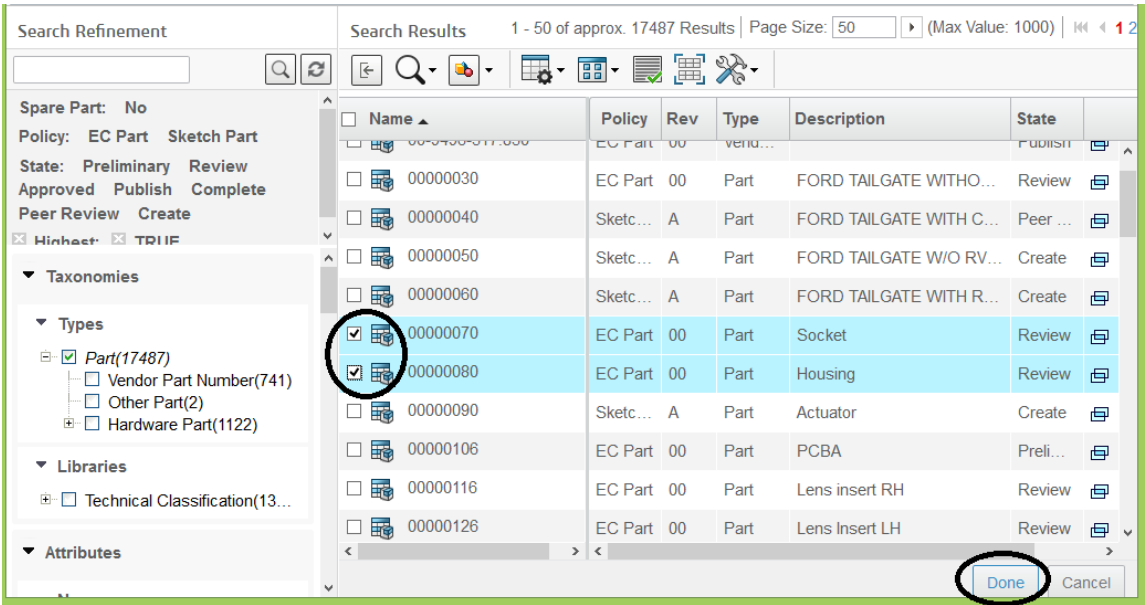
The table contains a new record related to part created; the new part is contained only in the CBOM related to variant used to create the new part (in the example, the user has selected the icon contained in cell related to variant 00000304)

<input type="checkbox"/>	Name	Description	Variants	Type
<input type="checkbox"/>	 RFQ-0000002-06	C519 ITM - With CAM (EC3)	<div> <div>00000304 Tailgate module without</div> <div> </div> </div> <div> <div>00000295 Tailgate module with ca</div> <div> </div> </div>	Request for Quotation
<input type="checkbox"/>	 00015771		<div>   </div> <div> <div>qty:1.0 </div> <div> </div> </div>	Part







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Add Existing Parts

The user has to select the icon Add Existing  in the cell related to variant CBOM has to be updated; the user has to select the parts to add to CBOM and select Done



The table is updated automatically; the table contains the selected parts only in the CBOM related to variant used to add the existing parts (in the example, the user has selected the icon contained in cell related to variant 00000304)

<input type="checkbox"/>	Name	Description	Variants	Type	PLM Stat
<input type="checkbox"/>	RFQ-0000002-06	C519 ITM - With CAM (EC3)	<div>00000304 Tailgate module without</div> <div>00000295 Tailgate module with ca</div> <div>* +</div> <div>* +</div>	Request for Quotation	Con BOI
<input type="checkbox"/>	00000070	Socket	<div></div> <div> qty:1.0</div>	Part	Rev
<input type="checkbox"/>	00000080	Housing	<div></div> <div> qty:1.0</div>	Part	Rev
<input type="checkbox"/>	00015771		<div> qty:1.0</div> <div></div>	Part	Cre

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## Create Part by Clone



The user has to select the icon Create Part Clone in the cell related to part to be copied and related to variant CBOM has to be updated.

The function creates a new part, copying the information from the part related to selected icon, and add the part to variant CBOM





In the example, selecting the icon related to part 00000070 and contained in column related to variant 00000304, the system has created a new part 00015781 with the same information of selected part; the new part is contained in CBOM of part 00000304. The table is refreshed automatically.

									UoM		(grams)	
<input type="checkbox"/>	RFQ-0000002-06	C519 ITM - With CAM (EC3)	<div>00000304 Tailgate module without</div> <div> </div>	<div>00000295 Tailgate module with ca</div> <div> </div>	Request for Quotation	Concept BOM	314 ...					
<input type="checkbox"/>	00000070	Socket	<div> </div> <div>  qty:1.0 </div>	<div>  qty:1.0 </div>	Part	Review	00	PCS - PIECES	G	22.0	22.0	Design
<input type="checkbox"/>	00000080	Housing	<div> </div> <div>  qty:1.0 </div>	<div>  qty:1.0 </div>	Part	Review	00	PCS - PIECES	G	40.0	41.0	Design
<input type="checkbox"/>	00015771		<div>  qty:1.0 </div> <div> </div>	<div> </div>	Part	Create	A	PCS - PIECES		0.0	0.0	Design
<input type="checkbox"/>	00015781	Socket	<div>  qty:1.0 </div> <div> </div>	<div> </div>	Part	Create	A	PCS - PIECES	G	22.0	22.0	Design

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Add Existing Parts (already contained in Summary Matrix)

































The user has to select the icon Add Existing  in the cell related to part to be added and related to variant CBOM has to be updated.

In the example, selecting the icon  related to part 00000080 and contained in column related to variant 00000304, the system has added the part 00000080 in CBOM of part 00000304. The table is refreshed automatically.

Before the icon selection

<


After the icon selection


<input type="checkbox"/>		RFQ-0000002-06	C519 ITM - With CAM (EC3)	<table><tr><td>00000304 Tailgate module without</td><td>00000295 Tailgate module with ca</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></table>	00000304 Tailgate module without	00000295 Tailgate module with ca						
00000304 Tailgate module without	00000295 Tailgate module with ca											
												
												
<input type="checkbox"/>		00000080	Housing	<table><tr><td></td><td></td><td></td><td></td></tr><tr><td colspan="2">qty:1.0 </td><td colspan="2">qty:1.0 </td></tr></table>					qty:1.0 		qty:1.0 	
												
qty:1.0 		qty:1.0 										

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Remove Parts








The user has to select the icon Disconnect  in the cell related to part to be removed and related to variant CBOM has to be updated.

In the example, selecting the icon  related to part 00000080 and contained in column related to variant 00000295, the system has removed the part in CBOM. The table is refreshed automatically.

Before the icon selection

		00000304 Tailgate module without	00000295 Tailgate module with ca
<input checked="" type="checkbox"/>	 RFQ-0000002-06	C519 ITM - With CAM (EC3)	 
<input checked="" type="checkbox"/>	 00000080	Housing	  qty:1.0 

After the icon selection

		00000304 Tailgate module without	00000295 Tailgate module with ca
<input type="checkbox"/>	 RFQ-0000002-06	C519 ITM - With CAM (EC3)	 
<input type="checkbox"/>	 00000080	Housing	  qty:1.0 

If part removed is not used in any CBOMs related to RFQ variants, the part is not more viewable in Summary Matrix table.

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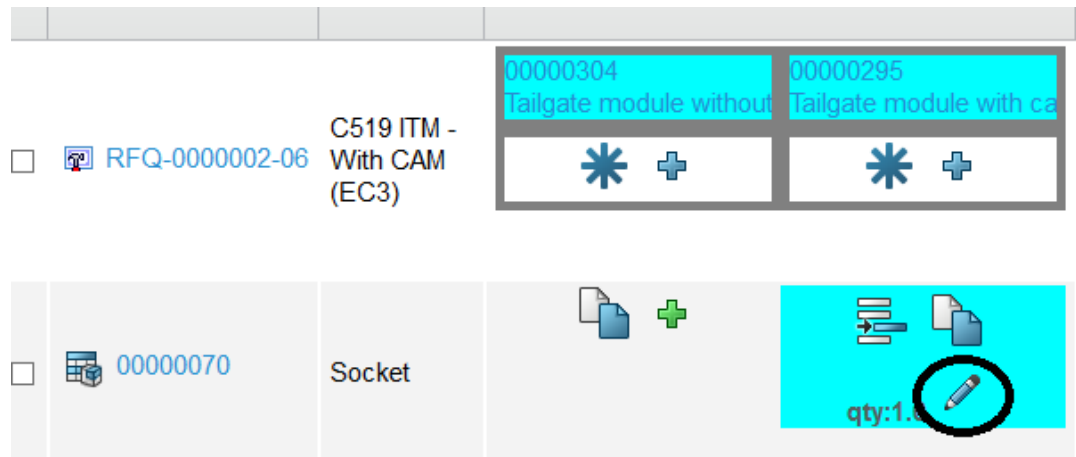
## Edit Quantities

The user has to select the icon Edit





in the cell related to part to be updated and related to variant CBOM has to be updated.

In the example, selecting the icon related to part 00000070 and contained in column related to variant 00000295, the system will open a new window with only the Quantity information.



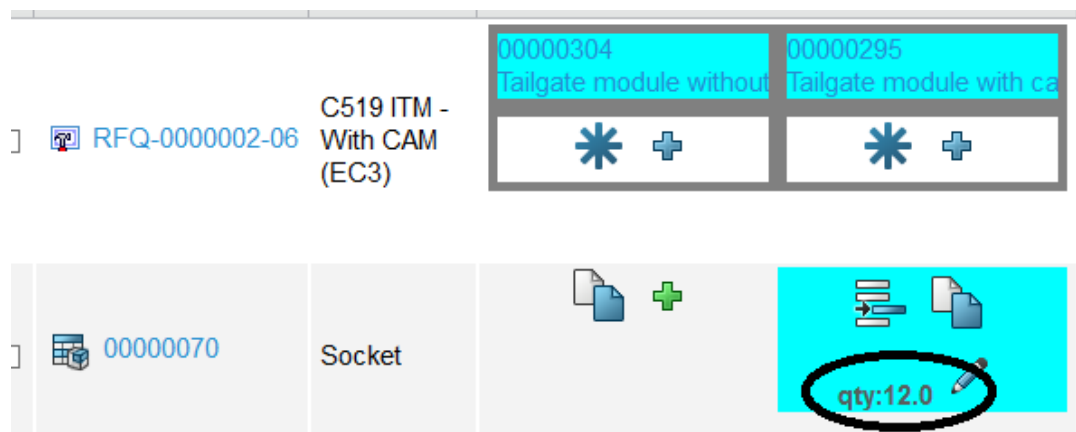
The user has to update the Quantity and select Done; the table is refreshed automatically.

Part 00000295 re...


*Fields in red italics are required*

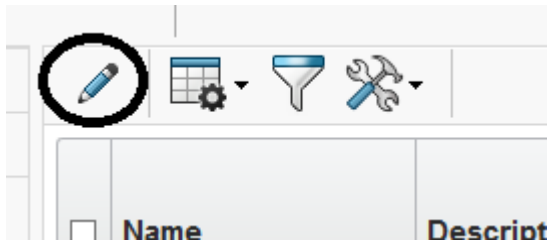
Quantity



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## Edit Technical information

The user has to select the icon Edit  in the toolbar of the Summary Matrix table.



The system will open a new window with a table similar to previous without the icons used to updated the CBOMs contents. The user has to complete the information and select Save.

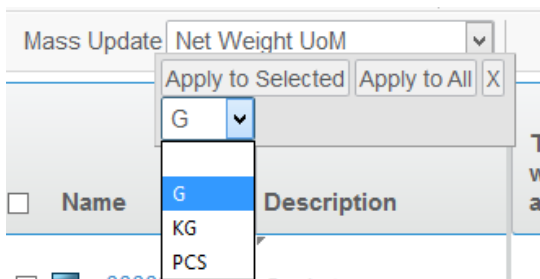
RFQ-0000002-06 rev 31474895165206: Structure View


Mass Update Save Reset Close

<input type="checkbox"/> Name	Description	Tailgate module without camera, 45 deg actuation angle	Tailgate module with camera and washer, 45 deg actuation angle	Type	PLM State	Rev	U of M	Net Weight UoM	Weight	Part Weight Gross / (grams)
<input type="checkbox"/> 00000070	Socket		12.0	Part	Review	00	PCS - PIECE S	G	22.0	22.0
<input type="checkbox"/> 00000080	Housing	1.0		Part	Review	00	PCS - PIECE S	G	40.0	41.0
<input type="checkbox"/> 00015771		1.0		Part	Create	A	PCS - PIECE S		0.0	0.0
<input type="checkbox"/> 00015781	Socket	1.0		Part	Create	A	PCS - PIECE S	G	22.0	22.0

4 objects

The user can use also the Massive Update function



After part creation, the user has to refresh the table using the icon  (the table is not updated automatically)

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## Edit Part Material information


The user has to select the icon Edit  contained in the table related to part to be updated.

Is	Painting Materials		Name	Description
----	--------------------	--	------	-------------



RFQ-0000002-06

C519 ITM -  
With CAM  
(EC3)

			 00000070	Socket
--	--	---	--	--------

The system will open a new window with Part Material information; after completed (see chapter “Material Parts” in “Part Header portal”), the user has to select Done. the table is refreshed automatically.

Part 00000070 rev 00: Properties

Fields in red italics are required

Name	00000070	Revision	00	State	Review
Description	Socket				

Base Materials

	Material	Thickness	Percentage	Qty
1	190752 (ULTRADUR LI)			
2				
3				
4				
5				

Painting ☐ FALSE Laser Etching ☐ FALSE Plating ☐ FALSE

Plating Materials

	Material	S.A. Net	S.A. Gross	Layers	Process	Qty
1						
2						
3						
4						
5						

Painting Materials

Done

Cancel

Version	11	Date:	28-Nov-2017
Status	Released		89

## RFQ18 Import CBOM from ECAD

<b>Purpose</b>	Electronic Engineer defines portion of CBOMs related to electronic components.	<b>Status</b>	Define
<b>Stakeholders</b>	Electronic Engineer		
<b>Beginning</b>	RFQ has variants defined		
<b>Interactions</b>	Electronic Engineer can import, for each variant contained in RFQ, portion of CBOM with components definition		
<b>End</b>	CBOMs contain electronic components		
<b>Constraints</b>			

ECAD user has to prepare an Excel file (usually created using ECAD functionality) containing information related to components and numbering, in a PCB project.

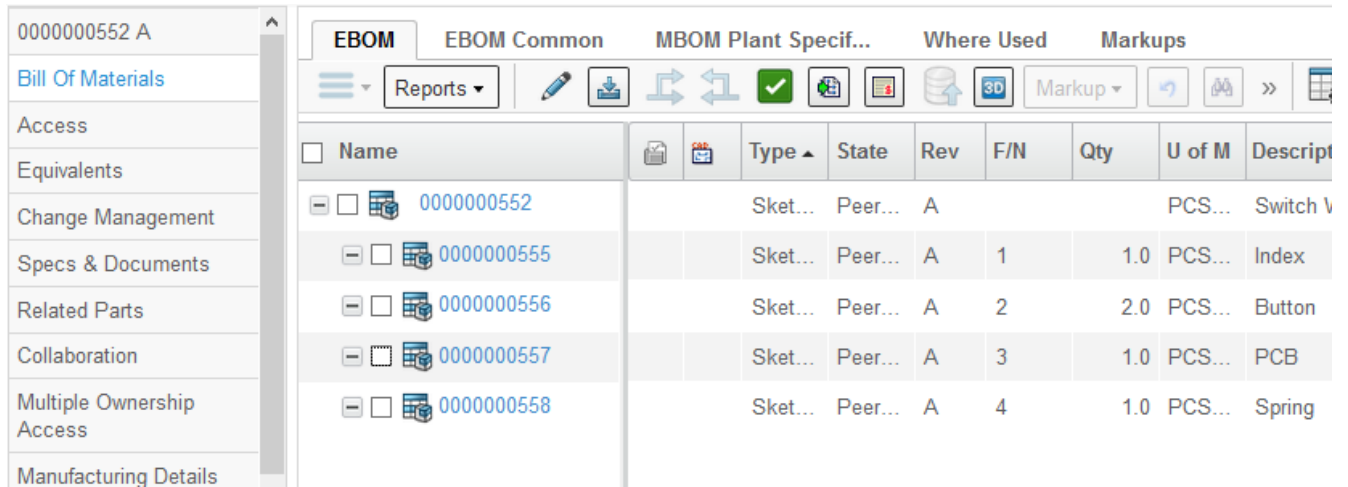
	A	B	C	D	E	F	G	H
1	Schematic Ref. No.	Components Des.	Package	Supplier	Part No.	Quantity	Unit Cost	Total Cost
2							Euro	Euro
3	PCB	PCB FR4 1.6mm				1	0.3000	0.3000
4	D1-D4,D5	BAS21				5	0.0200	0.1000
5	LED	Color to CIE 1931	Mini- Topled	Osram	LCB M67S K1M1 7J8K	1	0.1100	0.1100
6	R3,R4	Resistors, 1k, 5%	1206			3	0.0020	0.0060
7	C1-C4	Capacitors 10nF	603			4	0.0030	0.0120
8	Sw1+Sw2 / Sw3+Sw4	Switch		Alps	SPVQ910201	2	0.6000	1.2000
9	LED for flood lighting					2	0.1100	0.2200
10	Resistors for flood lighting - R5,6					3	0.0020	0.0060
11	Connector - 8 pin, soldered to PCB - as per PCB 16128					1	0.1000	0.1000
12								0.0000
13								0.0000
14								0.0000
15								0.0000
16							ICT	0.0880
17							PTH	
18							SMT	0.1760
19							Other	0.1159
20							Sub-total	2.4339
21							Total	2.6286
22								
23								
24								
25	<b>Notes:</b>							
26	Added components over initial PCB RFQ							
27								
28								
29								

### Step 1 Select Variants command

RFQ000005-01			
Folders			
Variants			
Sales Options			
Estimated Volumes			
Lifecycle			
Members			
	<input type="checkbox"/> Name ▲	Rev	Type
	<input type="checkbox"/> 0000000552	A	Sket... Switch Window lifter
	<input type="checkbox"/> 0000000553	A	Sket... Switch Color white
	<input type="checkbox"/> 0000000554	A	Sket... Switch color black

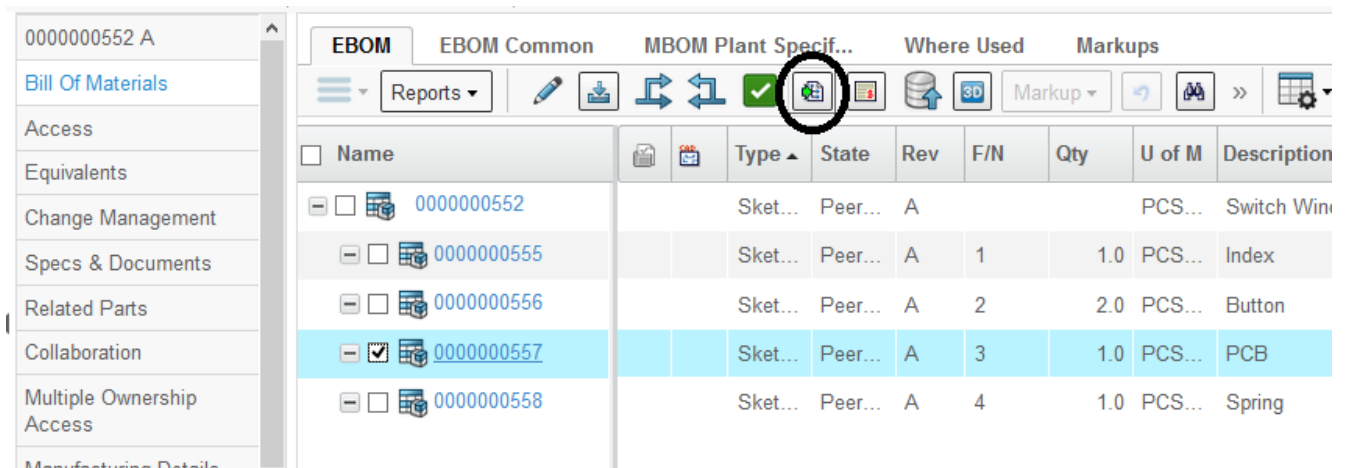
Version	11	Date:	28-Nov-2017
Status	Released		90

Step 2 For each variant, select part number from table and select Bill of Material command



Name	Type	State	Rev	F/N	Qty	U of M	Description
0000000552	Sket...	Peer...	A			PCS...	Switch V
0000000555	Sket...	Peer...	A	1	1.0	PCS...	Index
0000000556	Sket...	Peer...	A	2	2.0	PCS...	Button
0000000557	Sket...	Peer...	A	3	1.0	PCS...	PCB
0000000558	Sket...	Peer...	A	4	1.0	PCS...	Spring

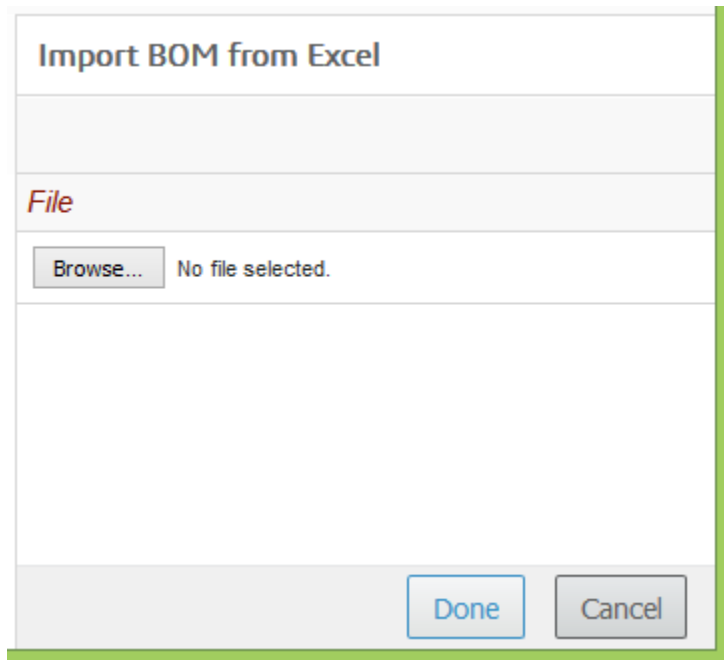
Step 3 From Action menu, select commands to import EBOM



Name	Type	State	Rev	F/N	Qty	U of M	Description
0000000552	Sket...	Peer...	A			PCS...	Switch Win
0000000555	Sket...	Peer...	A	1	1.0	PCS...	Index
0000000556	Sket...	Peer...	A	2	2.0	PCS...	Button
0000000557	Sket...	Peer...	A	3	1.0	PCS...	PCB
0000000558	Sket...	Peer...	A	4	1.0	PCS...	Spring

Version	11	Date:	28-Nov-2017
Status	Released		91

#### Step 4 Select file from local directory



Import BOM from Excel

*File*

Browse... No file selected.

Done Cancel

CBOM is updated with components contained in Excel file.

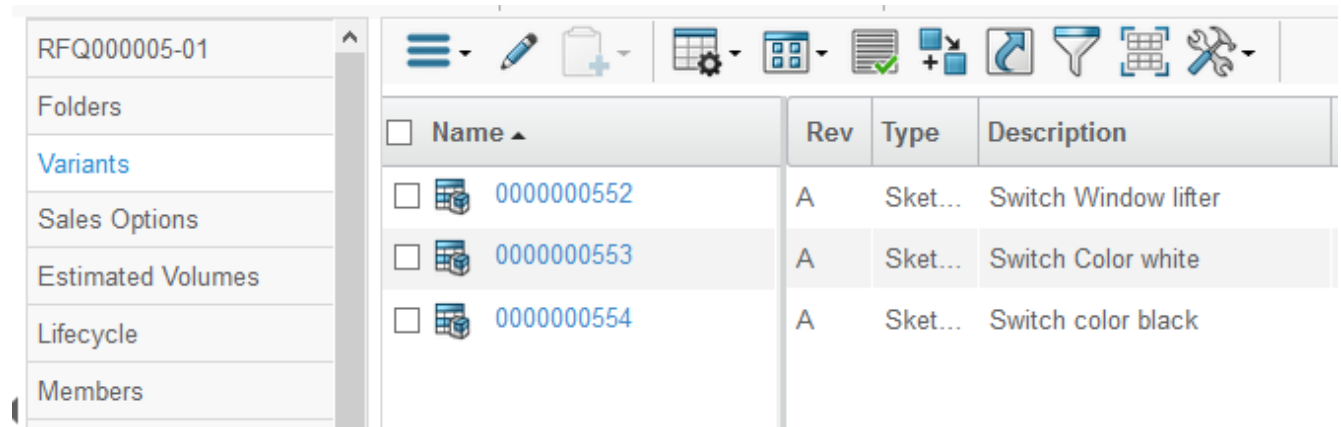
Version	11	Date:	28-Nov-2017
Status	Released		92



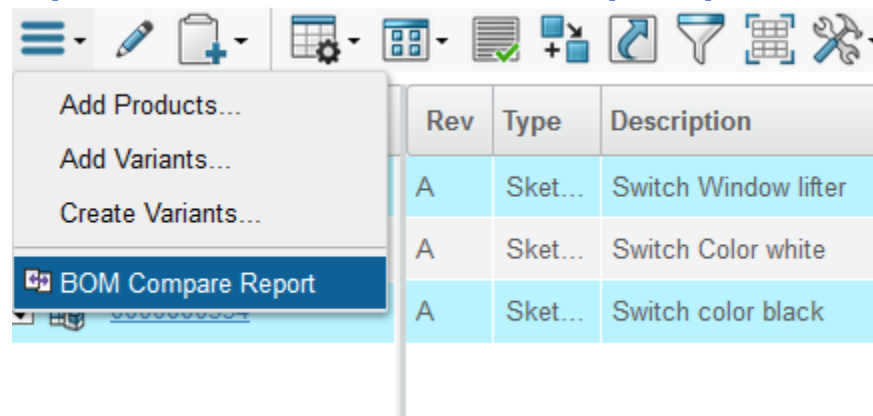
## RFQ19 Compare and Copy CBOM

<b>Purpose</b>	Engineer Manager defines CBOMs related to new variants or updates CBOM related to existing variants	<b>Status</b>	Define
<b>Stakeholders</b>	Engineer Manager		
<b>Beginning</b>	RFQ has variants defined		
<b>Interactions</b>	Engineer Manager can compare different variants and copy a selection of components from one CBOM to another		
<b>End</b>	CBOMs are completed		
<b>Constraints</b>			

### Step 1 Select Variants command



### Step 2 Select two variants and select BOM Compare Report command



Step 3 Select Apply command; from one CBOM, select components to be copied to second CBOM using the dedicate icons

Version	11	Date:	28-Nov-2017
Status	Released		93

**BOM Compare Report**

Revision:  Format:  ☒ Structured Report ☐ Consolidated Report

Revision Options:  As Stored  As Stored

Report Differences By: ☒ Part Name ☒ Revision ☐ Type ☐ Find Number ☐ Reference Designator ☐ Component Location ☒ Qty ☐ Unit of Measure ☐ Substitute For ☐ Usage ☐ Make Buy ☐ S Type ☐ Select All

**Apply** **Reset**

**Complete Summary** **Difference Only R...** **Common Components...** **Unique to Left Re...** **Unique to Right R...**

**Save** **Reset**

	Part Name	Rev	Type	F/N	Ref Des	Component L	De	Part Name	Rev	Type	F/N	Ref Des	Component L	Description	State
	0000000552	A	Part					0000000554	A	Part					Creat
	0000000554	A	Part	1			Inc	0000000555	A	Part	1			Index	Peer.
	0000000555	A	Part	2			Bl	0000000556	A	Part	2			Button	Peer.
	0000000556	A	Part	3			PC	0000000557	A	Part	3			PCB	Peer.
	0000000557	A	Part	4			Sp	0000000558	A	Part	4			Spring	Peer.
DEL								B52106-05	00A	Part	5			HOUSING	Rele.
DEL								B52106-06	00A	Part	6			HOUSING	Rele.

#### Step 4 Complete second CBOM with new or existing components

EBOM										
EBOM Common MBOM Plant Specif... Where Used Markups										
Reports										
Name	Type	State	Rev	F/N	Qty	U of M	Description	Weight	Part Weight Gross / (	
0000000053	Sket...	Create	A			EA (...)	HDSCS = Base Variant + ...	0.0 g		
0000000054	Sket...	Create	A	10	1.0	EA (...)	Housing	0.0 g		
0000000057	Sket...	Create	A	20	1.0	EA (...)	Indexing	0.0 g		
0000000055	Sket...	Create	A	30	1.0	EA (...)	Toggle	0.0 g		
0000000059	Sket...	Create	A	40	1.0	EA (...)	Socket	0.0 g		
0000000060	Sket...	Create	A	50	1.0	EA (...)	Slider	0.0 g		
16229	EC ...	Preli...	1	60	1.0	EA (...)	PCB	1.5 g		
30608	EC ...	Rele...	1	70	1.0	EA (...)	Roller	0.2 g		
40768	EC ...	Rele...	1	80	1.0	EA (...)	Plunger Spring	0.0 g		

Version	11	Date:	28-Nov-2017
Status	Released		94

## RFQ20 Summary Matrix Components

<b>Purpose</b>	Provide a report about all components contained in RFQ	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager and Quotation Manager		
<b>Beginning</b>	RFQ has variants defined		
<b>Interactions</b>	Sales and Quoting Manager can view components attribute values; they can also export in Excel a report with all components contained in RFQ		
<b>End</b>			
<b>Constraints</b>			

### Step 1 Select Summary Matrix Components tab

RFQ-0000005-01  
Request for Quotation...

Carry Over of existing Park Break Switch 218112 (2F2T-15852-AB) for P375 Program.

State: Sales Review  
Owner: daniel eiffer  
Modified: Dec 1, 2016 5:50:25 PM

Name	Description	PARK BRAKE SWITCH 1	PARK BRAKE SWITCH 2	PARK BRAKE SWITCH 3	PARK BRAKE SWITCH 4	Type	PLM State	Rev	Net Weight UoM
13027	PLUNGER	1.0	1.0	1.0	1.0	Part	Release	01	
52542	HOUSING(8.9MM)	1.0		1.0		Part	Release	12	
52543	HOUSING(12.7MM)		1.0		1.0	Part	Release	12	
52544	INS MOULDED SOCKET	1.0	1.0		1.0	Part	Release	13	
52545	INS MOULDED SOCKET			1.0		Part	Release	13	
63483	CONTACT BRIDGE	1.0	1.0	1.0	1.0	Part	Release	03	
C40724	COMPRESSION SPRING	1.0	1.0	1.0	1.0	Part	Release	00	

Summary Matrix Components

### Step 2 Select command Export

Export

Printer Friendly

Multi Column Sorting

Help

	A	B	C	D	E	F	G	H	I
1	RFQ-0000005-01 rev 214653	1601610: Structure View							
2									
3	Level	Name	Description	PARK BRAKE SWITCH 1	PARK BRAKE SWITCH 2	PARK BRAKE SWITCH 3	PARK BRAKE SWITCH 4	Type	PLM St
4	1	13027	PLUNGER	1.0	1.0	1.0	1.0	Part	Releas
5	1	52542	HOUSING(8.9MM)	1.0		1.0		Part	Releas
6	1	52543	HOUSING(12.7MM)		1.0		1.0	Part	Releas
7	1	52544	INS MOULDED SOCKET	1.0	1.0		1.0	Part	Releas
8	1	52545	INS MOULDED SOCKET			1.0		Part	Releas
9	1	63483	CONTACT BRIDGE	1.0	1.0	1.0	1.0	Part	Releas
10	1	C40724	COMPRESSION SPRING	1.0	1.0	1.0	1.0	Part	Releas
11									

Version	11	Date:	28-Nov-2017
Status	Released		95

## RFQ21 Activities estimation

<b>Purpose</b>	Users involved in RFQ have to provide an estimation	<b>Status</b>	Define
<b>Stakeholders</b>	Manager with Quotation tasks assigned		
<b>Beginning</b>	RFQ has moved to status Quoting		
<b>Interactions</b>	<p>Users involved are notified by email; each user can see tasks assigned using a Task dashboards or using a dedicated view in RFQ process.</p> <p>Users have to define Estimated Duration/Effort fields and complete the tasks.</p>		
<b>End</b>	<p>Quotation tasks have the status Complete and an Estimated Duration/Effort completed.</p> <p>Additional documents can be uploaded as task deliverables</p>		
<b>Constraints</b>	CBOMs are completed; Quotation tasks have to be assigned to users		

Quotation tasks assigned to a specific user are available in Home command, tab Task.

Step 1 Select Home command, select Tasks tab, select hyperlink related to task name

▼ Collaboration and Approvals

Home Change Management User

Home Engineering User

Home Project User

Home

Issues Summary

Shortcuts...

Collections

Tasks

Subscriptions

Meetings

My Calendar

Decisions

Discussions

Tasks

Approval Tasks

Projects

Issues

Approval Issues

My Calendar

Tasks

Filter: Assigned Tasks

<input type="checkbox"/>	Name		Slip Days			State	% Complete	Project
<input type="checkbox"/>	Change in led colour		8	0	0	Review	<div><div>100</div></div>	CN 0000166
<input type="checkbox"/>	Tool design reviews		3	0	0	Review	<div><div>100</div></div>	Tool1
<input type="checkbox"/>	TFC		0	0	0	Review	<div><div>100</div></div>	RFQ000001-01
<input type="checkbox"/>	Tweaking of resistance		0	0	0	Review	<div><div>100</div></div>	CN 0000166
<input type="checkbox"/>	BOM Concept		0	0	0	Assign	<div><div></div></div>	RFQ000005-01
<input type="checkbox"/>	BOM Concept		0	0	0	Review	<div><div>50</div></div>	RFQ000004-01
<input type="checkbox"/>	Lab Testing and Equipment		0	0	0	Assign	<div><div></div></div>	RFQ000004-01
<input type="checkbox"/>	Modification of PCB size/design		0	0	0	Assign	<div><div></div></div>	CN 0000166

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## Step 2 Select icon Expand All in order to view all estimation tasks

The tasks related to RFQ use a table definition with specific columns: Duration/Effort in hour, Cost, Design Center and Notes

introduce Modified: Dec 2, 2015 3:37:17 PM

Close Load Estimation... Actions Edit Type Task No 1

Name	Type		State	Duration/Effort (Hour)	Cost	Design Cente	Notes
<input checked="" type="checkbox"/> Engineering Mechan	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> Misc. Cost	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-FMEA Enginee	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> P-FMEA Support	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Engi	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Moul	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Start	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Manu	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Supp	Task	0	Assign	0	-		
<input checked="" type="checkbox"/> D-Reviews Cust	Task	0	Assign	0	-		

## Step 3 In order to define efforts and costs, select icon Edit and enter values

Close Load Estimation... Actions Edit Type Task No 1

Mass Update

Save Reset

Name	Type		State	Duration/Effort (Hour)	Cost	Cost Rate	Notes
<input checked="" type="checkbox"/> Lab Testing and Equipmen	Task	0	Assign	0			
<input checked="" type="checkbox"/> Misc. Cost MTL	Task	0	Assign	0	100 euro -		
<input checked="" type="checkbox"/> Lab Testing and Deve	Task	0	Assign	0			
<input checked="" type="checkbox"/> D-FMEA support	Task	0	Assign	12 0			
<input checked="" type="checkbox"/> Analysis	Task	0	Assign	24 0			
<input checked="" type="checkbox"/> D-Reviews Engin	Task	0	Assign	8 0			
<input checked="" type="checkbox"/> Testing Jigs Set-I	Task	0	Assign	12 0			
<input checked="" type="checkbox"/> Administration	Task	0	Assign	0			
<input checked="" type="checkbox"/> Testing	Task	0	Assign	0			
<input checked="" type="checkbox"/> Report Generation	Task	0	Assign	0			
<input checked="" type="checkbox"/> DVEs and Spac	Task	0	Assign	0			

Subcontracted

Filter:RFQ View, Tasks 31 objects

Press Save to save values entered; Edit session can be repeated several times.

Users have to enter values for leaf tasks (tasks without sub-tasks); the system will retrieve the sum for all summary tasks (tasks composed by sub-tasks).

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<input type="checkbox"/> Name	Type			State	Duration/Effort (Hour)	Cost
<input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Equipmen	Task	0		Assign	56	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Misc. Cost MTL	Task	0		Assign	0	100 euro
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Deve	Task	0		Assign	56	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> D-FMEA support	Task	0		Assign	12	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Analysis	Task	0		Assign	24	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> D-Reviews Engineeri	Task	0		Assign	8	

Step 4 Using command Load Estimation From Project, user can enter Duration/Effort values copying the value from another RFQ.

Engineering Mechanical Resources

Task (7114490640438...)

RFQ000008-01 introduce

State:

Owner: tonyd

Modified: Dec 2, 2015 3:37:17 PM

Type  No

<input type="checkbox"/> Name	Type			State	Duration
<input type="checkbox"/> <input checked="" type="checkbox"/> Engineering Mechani	Task	0		Assign	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Misc. Cost	Task	0		Assign	

A new window is opened with all RFQs; the user has to select a RFQ and select command Submit.

Search Refinement

Search Results 1 - 37 of approx. 37 Results | Page Size: 50 (Max Value: 1000)

▼ Taxonomies

▼ Types

☐ Project Management(37)

☒ Request for Quotation...

▼ Attributes

Name

Originated

Modified

Description

Comment

LABEL

Name	Description	Status	Issue Date	Owner	Due Date
<input type="radio"/> RFQ-0000016-01	Test RFQ with new naming	RFQ...	Jan 18, ...	Test...	Jan 2...
<input type="radio"/> RFQ-0000016-02	Test RFQ with new naming	RFQ	Jan 18, ...	Test...	Jan 2...
<input type="radio"/> RFQ-0000016-03	Test RFQ with new naming	Con...	Jan 21, ...	Giu...	Jan 2...
<input type="radio"/> RFQ-0000017-01	Test 2 RFQ new naming	Con...	Jan 18, ...	Test...	Feb 4,...
<input checked="" type="radio"/> RFQ-0000018-01	Window lifter for BMW 5 ...	Con...	Jan 26, ...	Tony...	Feb 5,...
<input type="radio"/> RFQ-0000019-01	Engine start stop and HV...	Con...	Jan 26, ...	Tony...	Feb 5,...
<input type="radio"/> RFQ-0000020-01	Ford B-Max glove box swi...	Con...	Jan 26, ...	Tony...	Feb 5,...
<input type="radio"/> RFQ-0000021-01	test new rfq	RFQ...	Feb 17, ...	Kevi...	Feb 1...
<input type="radio"/> RFQ-0000022-01	test folders	RFQ...	Mar 18, ...	Kevi...	Mar 2...
<input type="radio"/> RFQ-0000026-01	aa	RFQ...	Mar 18, ...	Kevi...	Mar 2...

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Users have to enter values for leaf tasks (tasks without sub-tasks); the system will retrieve the sum for all summary tasks (tasks composed by sub-tasks).

<input type="checkbox"/> Name	Type			State	Duration/Effort (Hour)	Cost
<input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Equipmen	Task	0		Assign	56	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Misc. Cost MTL	Task	0		Assign	0	100 euro
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and Deve	Task	0		Assign	56	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> D-FMEA support	Task	0		Assign	12	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Analysis	Task	0		Assign	24	
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> D-Reviews Engineeri	Task	0		Assign	8	

#### Step 5 Complete all Quotation tasks assigned to a user with dedicate commands

Select the top task, select command Close; the time spent to complete the command depends on number of tasks to close (vary from some seconds to a couple of minutes)

<input type="checkbox"/> Name
<input type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> Lab Testing and I
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Misc. Cost M

Version	11	Date:	28-Nov-2017
Status	Released		99



## RFQ22 Estimated Timing Plan definition

<b>Purpose</b>	Launch Manager provides an estimated timing plan	<b>Status</b>	Define
<b>Stakeholders</b>	Launch Manager		
<b>Beginning</b>	RFQ status is Complete BOM		
<b>Interactions</b>	CBOMs are complete; Sales Manager has provided, for each sales options, an estimated volumes scenario. Launch Manager can upload timing plan estimation		
<b>End</b>	RFQ estimated timing plans are complete		
<b>Constraints</b>			

Launch Manager can review information provided by manager during estimation (CBOMs, volumes estimated, tooling sets); has to provide one or more documents and information, to describe timing plan proposal for each sales options.

### Step 1 Select Home command, select Tasks tab, select hyperlink related to task name

The screenshot shows the 'Tasks' tab in the Launch Manager interface. The left sidebar has 'Home Project User' selected. The main area shows a list of tasks. The 'Timing Plan' task is highlighted with a red circle. The task details show it is in the 'Assign' state, with a dependency of 'RFQ000004-01'.

Name	Slip Days	State	% Complete	Project
CMS MBOM Change Mng and	42	Active	50	PLM Impl...
Analysis	0	Active	50	PLM Impl...
RFQ CBOM EBOM MBOM E	0	Active	50	PLM Impl...
Round	0	Active	50	PLM Impl...
Live Workshop	0	Active	50	PLM Impl...
Use Cases Approval	0	Active	50	PLM Impl...
Round	0	Active	50	PLM Impl...
Timing Plan	0	Assign		RFQ000004-01
Installation	0	Active	50	PLM Impl...
ProdInstallation	0	Assign		PLM Impl...
Project Management	0	Active	50	PLM Impl...

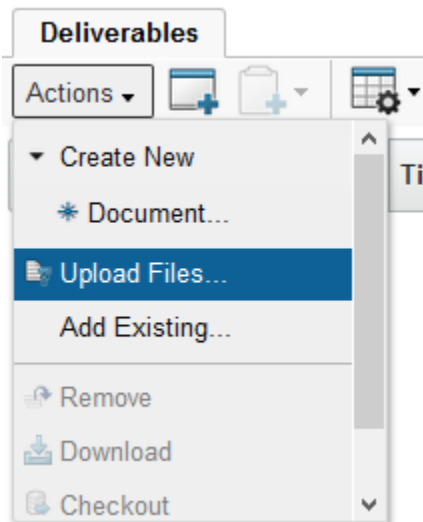
### Step 2 Select icon or dedicated command, to upload deliverables

The screenshot shows the 'Timing Plan' task details window. The left sidebar has 'Deliverables' selected. The main area shows a table with the task details. The 'Timing Plan' task is listed with a dependency of '2:FS+0.0 d'.

Name	Type	Id	Dependency
Timing Plan	Task		2:FS+0.0 d

Version	11	Date:	28-Nov-2017
Status	Released		100

Step 3 From Action menu, select Create New Document or Upload Files



Upload Files opens a form, where user can select one or more files as deliverables (select command Browse).

Document is created with an autaname function, with empty description and Title

A screenshot of a 'Checkin Files' form. The form has a header bar with a wrench icon and a dropdown arrow. Below the header is a table with two columns: 'File | Format' and 'Comments'. The first row of the table contains a file named 'PDS\_3DS\_MEM\_MasterPlan\_4\_2007\_20150306.mpp' with a 'generic' format. Below this row are three empty rows for additional file uploads. Each row has a 'Browse...' button and a 'generic' format dropdown. At the bottom right of the form are 'Done' and 'Cancel' buttons.

Create New Document function is executed in two steps:

- a) Define name (an autaname function is available), Title and description

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Status	Released		101

Step 1 of 2:Specify Details

Fields in red italics are required.

Name

☒ AutoName

Type

Document

Policy

Document Release

Title

Description

Access Type

Inherited

Document Type

Next

Cancel

b) Upload files (select command Browse)

Step 2 of 2: Upload Files

File | Format

Comments

Browse...

No file selected.

generic

Browse...

No file selected.

generic

Browse...

No file selected.

generic

Browse...

No file selected.

generic

Previous

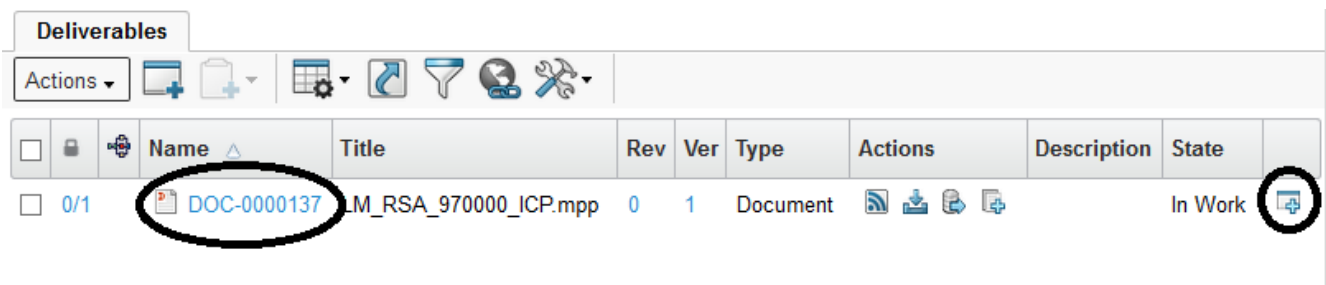
Done

Cancel

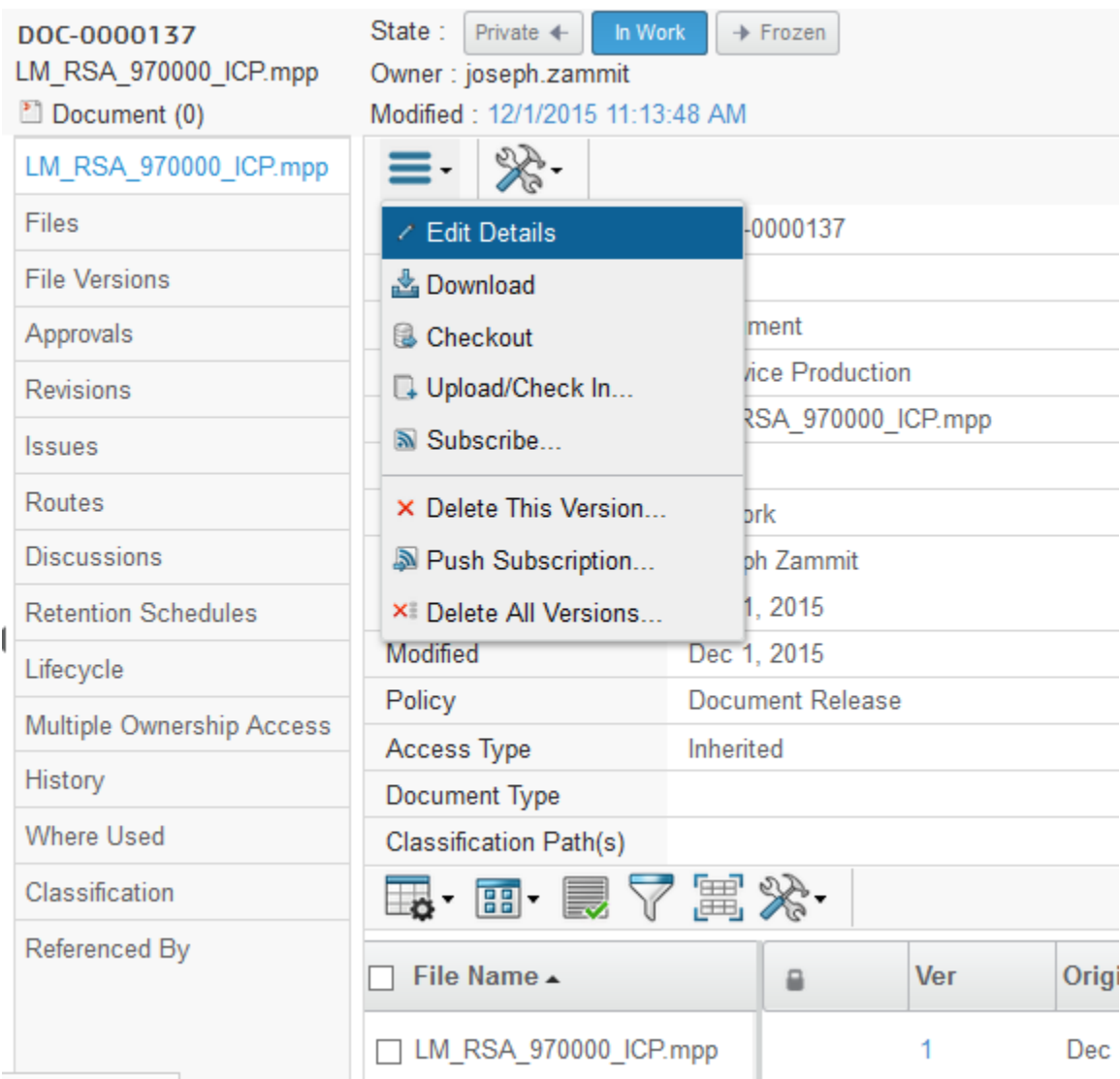
Version	11	Date:	28-Nov-2017
Status	Released		102

Step 4 Complete or update description

Select hyperlink or icon to popup a new window with document information



Select commands contained in Action menu in order to update or complete information, upload files.



Step 5 Complete Timing Plan task

Select the top task, select command Close (see “Task Completion”)

Version	11	Date:	28-Nov-2017
Status	Released		103

## RFQ23 Tooling Definition

<b>Purpose</b>	Tooling Manager checks and update tooling information and costs	<b>Status</b>	Define
<b>Stakeholders</b>	Tooling Manager		
<b>Beginning</b>	RFQ status is Quoting and Quotation tasks have been completed by users assigned		
<b>Interactions</b>	CBOMs are complete; Tooling Manager provides, for each variant, a proposal about tools used to produce components. Quotation Manager can view tooling cost estimation		
<b>End</b>	RFQ estimates are complete		
<b>Constraints</b>	RFQ estimates and CBOMs are complete with tooling proposal		

Tooling Manager can review information provided by manager during estimation (like CBOMs and volumes estimated); has to define tools used to produce variants and components.

### Step 1 Select Home page, select Tasks tab, select hyperlink related to RFQ package name

### Step 2 Select command Variants from RFQ package menu

Tooling Manager has to define tools used to produce each variant and each component:

- About variants, repeat step 3 for each variant.
- About components, repeat step 4 for each component.
- In order to update tools information, see step 5

Version	11	Date:	28-Nov-2017
Status	Released		104

### Step 3 (Variants definition) Select one variant; select command Tools Part

Name	Description	Estimated Cost	Prototype Cost	Tool Type	Cycle Time

Toolbar contains commands to create new tools, add existing tools, disconnect tools from part definition and a command to update tool information



Create new tool: user has to select how many tools have to be created

*Fields in red italics are required*

<i>Type</i>	Tool Parts	<i>Policy</i>	Generic
<i>AutoName Series</i>	Tool Part Number	Number of Parts	1

Done Cancel



Add Existing Tools: user has to select tool serial number and press Submit

Version	11	Date:	28-Nov-2017
Status	Released		105





Mass Update Save Reset

Name	Description	Usage Location	F/N	Estimated Cost	Prototype Cost	Tool Type	Cycle time (secs)
<input type="checkbox"/> Temp-10031	cap	Malta	1	100000	15000		
<input type="checkbox"/> Temp-10032	plunger	Malta	2	55000			

Assembly Line  
D and D  
Lab Jigs  
Production Tools  
Prototype Tools  
Samples for re sale

#### Step 4 (Components definition) Select command Summary Matrix Components

Table contains all components defined for all variants

RFQ000005-01	
Folders	
Variants	
Sales Options	
Estimated Volumes	
Lifecycle	
Members	
Activities Estimation	
Assignment View	
Summary Matrix Components	

Name	Description	Switch Window lift	Switch Color white	Switch color black
<input type="checkbox"/> 0000000555	Index	X	X	X
<input type="checkbox"/> 0000000556	Button	X	X	X
<input type="checkbox"/> 0000000557	PCB	X	X	X
<input type="checkbox"/> 0000000558	Spring	X	X	X
<input type="checkbox"/> B52106-05	HOUSING			X
<input type="checkbox"/> B52106-06	HOUSING			X

Select hyperlink for a component; select command Tool Parts and repeat task described for variants

0000000555 A

Bill Of Materials

Access

Specs & Documents

Related Parts

Collaboration

Multiple Ownership Access

Mass Update Save Reset

Name	Description	Estimated Cost	Prototype Cost
<input type="checkbox"/> 3370	housing	15000	

Repeat this task for each component

Version	11	Date:	28-Nov-2017
Status	Released		107

### Step 5 (Tools definition) Select command Tooling Cost Breakdown from RFQ package menu

Table contains all tools, defined using previous commands, contained in all variants and components. Select icon Edit in order to enter or update tools information

RFQ-0000003-01

Mass Update

Name	Description	Usage Location	Parts Connected	F/N	Estimated Cost	Prototype Cost	Tool Type	Cycle time (sec)
3370	HOUSING - 800050	Malta	57039-02, 000...					
Temp-10031	cap	Malta	00000394		100000	15000	Assemb...	
Temp-10032	plunger	Malta	00000394		55000		Assemb...	

Tooling Cost Breakdown

In order to upload additional document and close the task, see chapter “Estimated Timing Plan definition” and “Task Completion”.

New tools are created using a temporary name; Quoting Manager has the function to update tools information defined by Tooling Engineer and assign a definitive Tool Serial Number (see chapter Tooling Definition by Quoting Manager).

Version	11	Date:	28-Nov-2017
Status	Released		108

## RFQ24 TFC and Modularity checklist

<b>Purpose</b>	Engineering Managers involved in RFQ have to compile checklists	<b>Status</b>	Define
<b>Stakeholders</b>	Engineering Managers with Quotation tasks assigned		
<b>Beginning</b>	RFQ status is Concept BOM and Quotation tasks have been completed by users assigned		
<b>Interactions</b>	Users have to compile checklist items		
<b>End</b>	RFQ estimates are complete		
<b>Constraints</b>			

Engineering Manager can review information provided by manager during estimation (like CBOMs and volumes estimated); has to complete checklists used to evaluate technical feasibility and modularity parameters.

**Step 1** Select Home command, select Tasks tab, select hyperlink related to TFC or Modularity checklists

Name	Slip Days	State	% Complete	Project
<input type="checkbox"/> Change in led colour	8	Review	100	CN 0000166
<input type="checkbox"/> Tool design reviews	3	Review	100	Tool1
<input checked="" type="checkbox"/> TFC	0	Review	100	RFQ000001-01
<input type="checkbox"/> Tweaking of resistance	0	Review	100	CN 0000166
<input type="checkbox"/> BOM Concept	0	Assign		RFQ000005-01

User has to expand all checklist items and select icon Edit

Name	Description	Yes/No
<input checked="" type="checkbox"/> TFC		
<input type="checkbox"/> CH-0000002	RFQ PACKAGE CONSID...	
<input type="checkbox"/> CH-0000003	TECHNICAL CONSIDERA...	

Version	11	Date:	28-Nov-2017
Status	Released		109

User has to enter values to complete all checklist items; before close the task, the system checks if all “Yes/No” and “Response” fields are completed.

TFC

Assignees

Issues

Collaboration

Dependencies

Properties

Risks

Routes & Approvals

Images

Activities Estimation

Multiple Ownership Access

Checklists

Deliverables

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⚙️

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📄

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📄

🔧

Mass Update

⌵

<input type="checkbox"/> Name	Description	Yes/No	Response	Risk Mitigation	Rating Justification	Complete
<input type="checkbox"/> <input checked="" type="checkbox"/> TFC						
<input type="checkbox"/> → <input type="checkbox"/> CH- RFQ PACKAGE CONSID...						
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Are the drawings and asso...	Yes	5				
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Are the resources availab...	Yes	5				
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Have program milestones ...	Yes	5				
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Is product adequately defi...	Yes	5				
<input type="checkbox"/> → <input type="checkbox"/> CH- TECHNICAL CONSIDERA...						
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Business Processes And ...						
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Are any specific concessi...	Yes	5				
<input type="checkbox"/> → <input type="checkbox"/> <input checked="" type="checkbox"/> Are specified field and/or p...	Yes	4				

About Gate completion, see document “Project Users”.

Version	11	Date:	28-Nov-2017	
Status	Released			110

## RFQ25 Task Completion

<b>Purpose</b>	Users involved in RFQ have to provide an estimation	<b>Status</b>	Define
<b>Stakeholders</b>	Manager with Quotation tasks assigned		
<b>Beginning</b>	RFQ in status Quoting		
<b>Interactions</b>	Users can close the estimation tasks.		
<b>End</b>	Quotation tasks have the status Complete and an Estimated Effort completed.		
<b>Constraints</b>			

Step 1 Select Home command, select Tasks tab, select hyperlink related to task name

The screenshot shows the 'Tasks' tab selected in the top navigation bar. The left sidebar contains a 'Home' button, which is circled. The main task list displays several items, with 'BOM Concept' circled in the list. The task list includes columns for Name, Slip Days, State, % Complete, and Project.

Name	Slip Days	State	% Complete	Project
Change in led colour	8	Review	100	CN 0000166
Tool design reviews	3	Review	100	Tool1
TFC	0	Review	100	RFQ000001-01
Tweaking of resistance	0	Review	100	CN 0000166
<b>BOM Concept</b>	0	Assign		RFQ000005-01
BOM Concept	0	Review	50	RFQ000004-01
Lab Testing and Equipment	0	Assign		RFQ000004-01
Modification of PCB size/design	0	Assign		CN 0000166

Step 2 Select the top task, select command Close

The screenshot shows the details for the 'BOM Concept' task. In the top bar, the 'Close' button is circled. Below the bar, the task 'BOM Concept' is circled in the list. The list has columns for Name, Type, Id, and Dependency.

Name	Type	Id	Dependency
<b>BOM Concept</b>	Task		

Version	11	Date:	28-Nov-2017
Status	Released		111

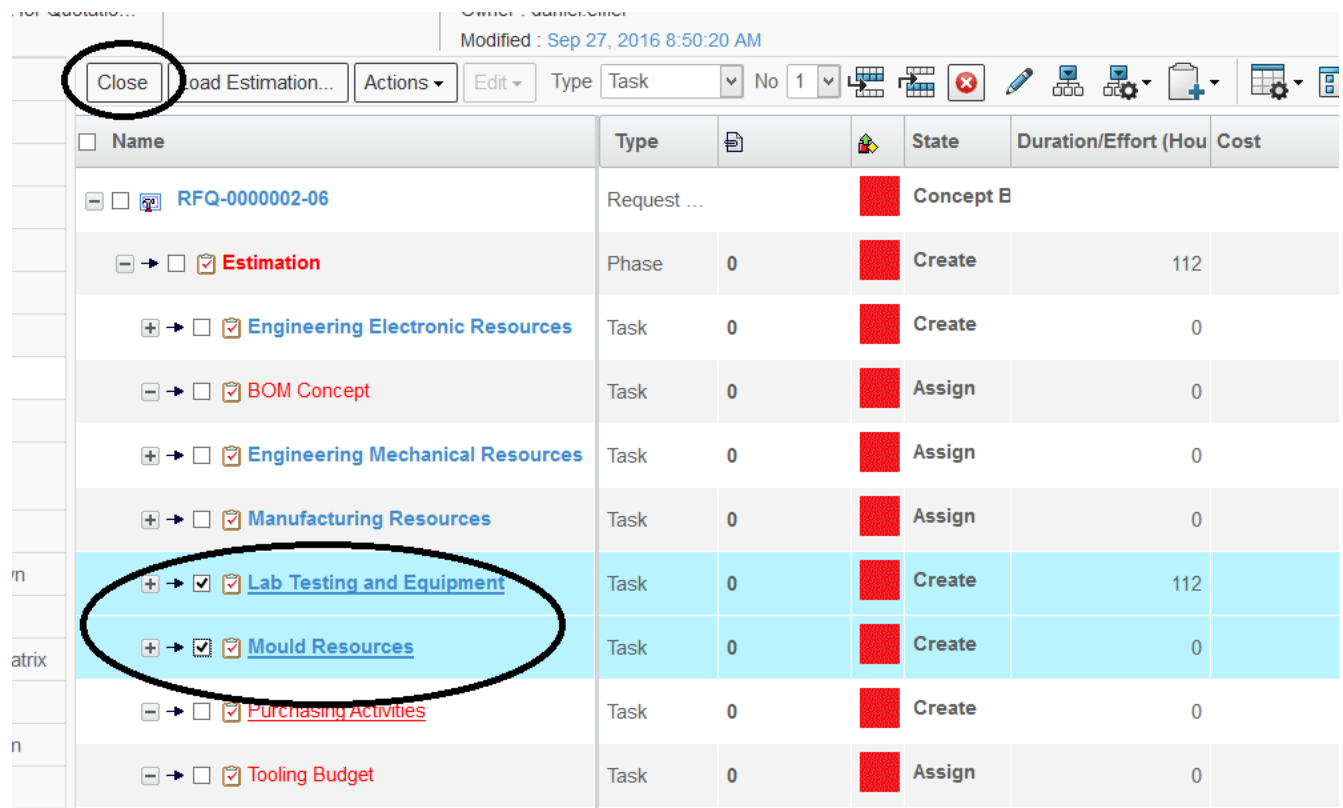
## RFQ26 Task Completion during RFQ Revision

<b>Purpose</b>	Users involved in RFQ have to provide an estimation	<b>Status</b>	Define
<b>Stakeholders</b>	Quoting Manager		
<b>Beginning</b>	RFQ in status RFQ		
<b>Interactions</b>	Quoting Manager can close the estimation tasks.		
<b>End</b>	Quotation tasks have the status Complete and an Estimated Effort completed.		
<b>Constraints</b>			

After a RFQ Revision, the estimation tasks are copied from previous revision to new one. Quoting Manager has to initiate a new estimation cycle; before preceeding with tasks assignment, Quoting Manager can review information provided by manager during previous revision estimation and can close the estimation tasks that is not need to be re-evaluated.

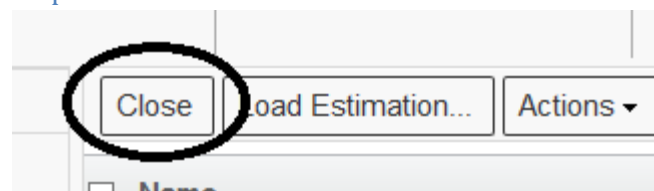
### Step 1 Quoting Manager has to select Activities Estimation command

Quoting Manager has to select the tasks that have not to be estimated in the RFQ revision. If the user selects a summary task (i.e. "Mould Resources") means all sub-tasks are closed.



Name	Type	State	Duration/Effort (Hou)	Cost
RFQ-0000002-06	Request ...	Concept B		
Estimation	Phase	0	Create	112
Engineering Electronic Resources	Task	0	Create	0
BOM Concept	Task	0	Assign	0
Engineering Mechanical Resources	Task	0	Assign	0
Manufacturing Resources	Task	0	Assign	0
Lab Testing and Equipment	Task	0	Create	112
Mould Resources	Task	0	Create	0
Purchasing Activities	Task	0	Create	0
Tooling Budget	Task	0	Assign	0

### Step 2 Select command Close contained in the toolbar



Close	Load Estimation...	Actions ▾
-------	--------------------	-----------

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Status	Released		112

Step 3 Tasks selected are closed

Close		Load Estimation...		Actions ▾		Edit ▾		Type	Task ▾	No	1 ▾						
<input type="checkbox"/>	Name	Type			State	Duration/Effort (Hou		Cost	De								
	RFQ-0000002-06	Request ...			Concept B												
		Estimation	Phase	0		Active	112		-								
		Engineering	Task	0		Create	0		-								
		BOM Concept	Task	0		Assign	0		-								
		Engineering	Task	0		Assign	0		-								
		Manufacturin	Task	0		Assign	0		-								
		Lab Testing a	Task	0		Complete	112		-								
		Mould Resou	Task	0		Complete	0		-								
		Purchasing Ac	Task	0		Create	0		-								
		Tooling Budget	Task	0		Assign	0		-								

Version	11	Date:	28-Nov-2017
Status	Released	113	



## RFQ27 Task Completed and Re-Activated

<b>Purpose</b>	Users involved in RFQ have to provide an estimation	<b>Status</b>	Define
<b>Stakeholders</b>	Manager with Quotation tasks assigned and Quoting Manager		
<b>Beginning</b>	RFQ in status Quoting		
<b>Interactions</b>	Users can close the estimation tasks; Quoting Manager can demote the task in order to reactivate it.		
<b>End</b>	Quotation tasks have the status Active and Manager can update Estimation and Effort.		
<b>Constraints</b>			

The estimation phase is composed by several tasks, group by in a phase named Estimation. During estimation phase, a task can be closed even if the estimation phase is not completed (a task assignee can close the task but some other tasks are not closed).

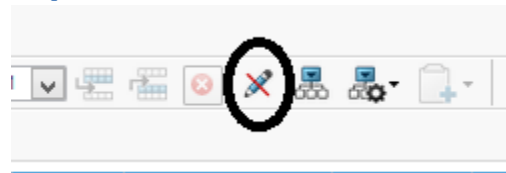
When a task is closed, the tasks assignee cannot update the effort or upload documents; the user has to ask the Quoting Manager to re-activate the task. The process to notify Quoting Manager to re-activate a task has to be performed outside PLM (user can phone or send an email to Quoting Manager).

The tasks in state Complete can be re-activated by Quoting Manager, only if phase Estimation is not closed (means, if not all estimation tasks are closed).

### Step 1 Quoting Manager has to select Activities Estimation command

RFQ-0000003-01	Close	Load Estimation...	Actions	Edit	Type	Task	No	1											
Folders																			
Variants																			
Sales Options																			
Estimated Volumes																			
Lifecycle																			
Members																			
Activities Estimation																			
Assignment View																			
Summary Matrix																			
Components																			
Tooling Cost Breakdown																			
Quotation Details																			
Quotation Summary																			
Matrix																			

### Step 2 Select command Edit contained in the toolbar



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Status	Released		114

Step 3 Re-activate closed tasks updating the task State to Active

RFQ-0000003-01

Close

Load Estimation...

Actions

Edit

Type Task

No 1

Mass Update

Name

RFQ-0000003-01

Estimation

BOM Concept

Engineering Mechanical Reso

Engineering Electronic Reso

Tooling Budget

TFC

Modularity

Type

Request ...

Phase 0

Task 0

Task 0

Task 0

Task 0

Gate 0

Gate 0

State

Concept B

Active

Complete

Assign

Active

Review

Complete

Review

Create

Duration/Effort (Hour)

149

0

149

0

0

0

0

Cost

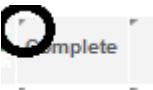
0

0

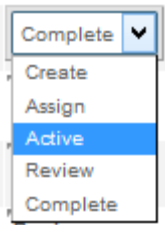
0

0

0



To enable the drop-down list, click the flag in the upper-left corner



Select the state Active  
Select command Save

Load Estimation...

Actions

Edit

Type Task

No 1

State

Save

Type

Request ...

Phase 0

Task 0

Task 0

Task 0

Task 0

Gate 0

Gate 0

State

Concept B

Active

Complete

Active ...

Assign

Assign

Duration/Effort (Hour)

149

0

149

0

0

0

0

Cost

0

0

0

0

0

Design Center

Notes

Version	11	Date:	28-Nov-2017
Status	Released		115

The task assignee can update the duration and effort because the estimation task is contained in his tasks list.

Approvals  
Home  
Home RFQ User  
Home Engineering User  
Home Change Management User  
Issues Summary  
Shortcuts...  
Collections  
Subscriptions  
Team  
Workspaces

Tasks
Issues
Approval Tasks
Approval Issues
Projects
My Calendar
Messages

Tasks | Filter: Assigned Tasks

☐ Name
Slip Days
State
% Complete
Project

☐ CAD work (design improvem
0
1
0
Assign
re-assignment test

☒ Engineering Mechanical Re
0
0
0
Active
RFQ-0000003-01

☐ TFC
0
0
0
Review
RFQ-0000003-01

☐ SLA Prototypes
0
1
0
Assign
re-assignment test

☐ Tuning loop 1
0
0
0
Assign
re-assignment test

Version	11	Date:	28-Nov-2017
Status	Released		116

## RFQ28 Tooling Definition by Quoting Manager

<b>Purpose</b>	Quoting Manager checks and update tooling information and costs; Quoting Manager creates tool part number in CMS.	<b>Status</b>	Define
<b>Stakeholders</b>	Quoting Manager		
<b>Beginning</b>	RFQ status is Quoting and Quotation tasks have been completed by users assigned; Tooling Manager has provided a proposal about tools used to produce components.		
<b>Interactions</b>	Quotation Manager can view and update tooling cost estimation		
<b>End</b>	Tools definition is complete; tools are created in CMS		
<b>Constraints</b>	RFQ estimates and CBOMs are complete with tooling proposal		

Quoting Manager can review information provided by Tooling Manager during estimation. Quoting Manager has access to same functions used by Tooling Manager to define and update tooling information. If necessary, Quoting Manager is able to create new tools, update tools information and disconnect tools defined by Tooling Manager (see chapter Tooling Definition about functions to create and manage tools)

### Step 1 Select hyperlink related to RFQ package name

### Step 2 Select command Tooling Cost Breakdown

Table contains all tools, defined using previous commands, contained in all variants and components. Select icon Edit in order to enter or update tools information

Version	11	Date:	28-Nov-2017
Status	Released		117

Even if the function is the same, Quoting Manager has access to an additional set of information:

- Customer Property
- Project Code
- CAR Number
- Budget (read only information, retrieved from CMS)

Name	Description	Additional Equipment	Capital Investment	Mould Design Hours	Remark	Customer Property	Project Code	CAR Number	Budget (CM)
3370	HOUSING - 800050		0,000	0		METHODE	03370		
Temp-10031	cap		0,000	0					
Temp-10032	plunger		0,000	0					

New tools are created using a temporary name; Quoting Manager has the function to update tools information defined by Tooling Engineer and assign a definitive Tool Serial Number.

### Step 3 Select hyperlink related to temporary tool serial number

RFQ-0000003-01	
Folders	
Variants	
Sales Options	
Estimated Volumes	
Lifecycle	
Members	

Name	Description
3370	HOUSING - 800050
Temp-10031	cap
Temp-10032	plunger

Version	11	Date:	28-Nov-2017
Status	Released		118

The system opens a window with tool information; Quoting Manager is able to update tool information using icon edit

Temp-10031 cap State : **Exists** Owner : Angelo Scerri Modified : Apr 20, 2016 6:15:55 PM

**Properties** Lifecycle History Images

Originator Angelo Scerri Originated Apr 20, 2016 Modified Apr 20, 2016

Part Classification - Quality Release

Description cap

Design Purchase Design

End Item No

**Tool Part Details**

Usage Location Malta Tool Type Assembly Line

Estimated Cost 100000 Prototype Cost 15000 Budget (CMS)

Cycle time (secs) / Shot 12 Tool life / shots Number of Cavities

Machine Size (T) Multiple Parts N Part Multiplier

Additional Equipment Mould Design Hours 0 Capital Investment 0,000

Customer Property Project Code CAR Number

Remarks

**Technical**

Net Weight 0.0 Gross Weight 0.0 Net Weight UOM

Update tool information and select command Done

**Properties** Lifecycle History Images

**Tool Part Details**

Usage Location Malta Tool Type Assembly Line

Estimated Cost 100000 Prototype Cost 15000 Budget (CMS)

Cycle time (secs) / Shot 12 Tool life / shots Number of Cavities

Machine Size (T) Multiple Parts N Part Multiplier

Additional Equipment Mould Design Hours 0 Capital Investment 0,000

Customer Property Project Code CAR Number

Remarks

**Technical**

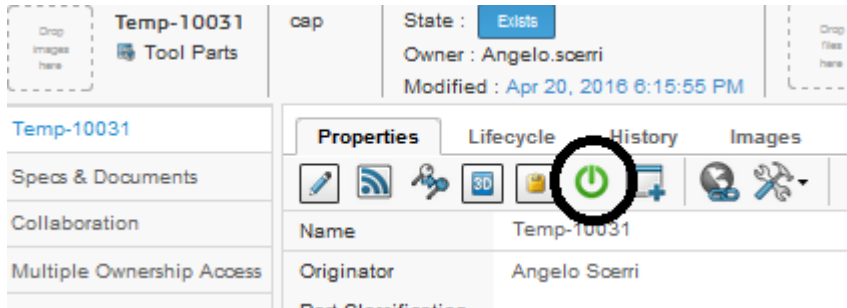
Net Weight 0.0 Gross Weight 0.0 Net Weight UOM

**Done** Cancel

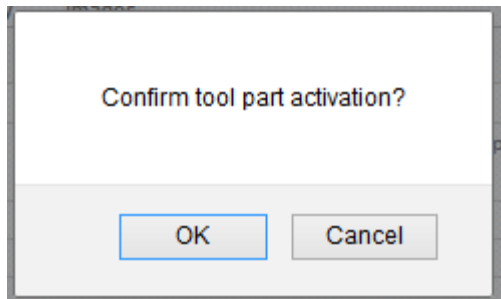
Version	11	Date:	28-Nov-2017
Status	Released		119

#### Step 4 Assign a definitive tool serial number

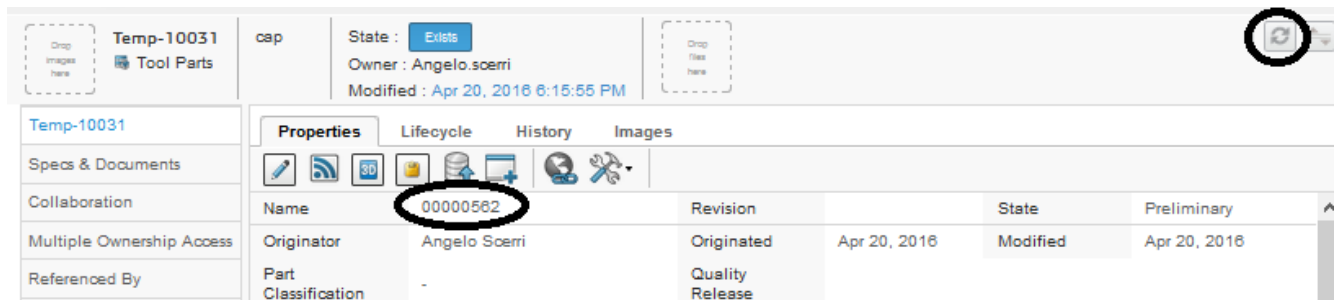
Select command Assign Tool Part



The user has to confirm

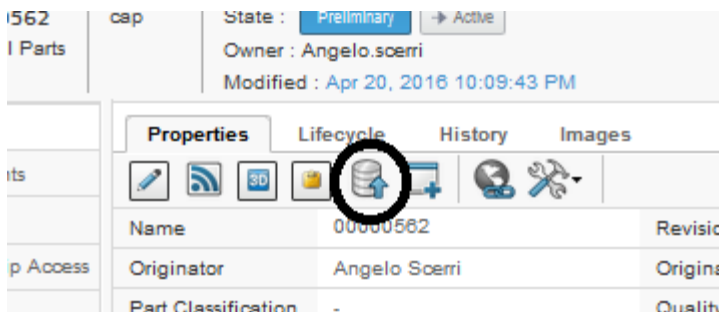


The system updates the temporary tool number with a definitive tool number (select icon Refresh to update also header)



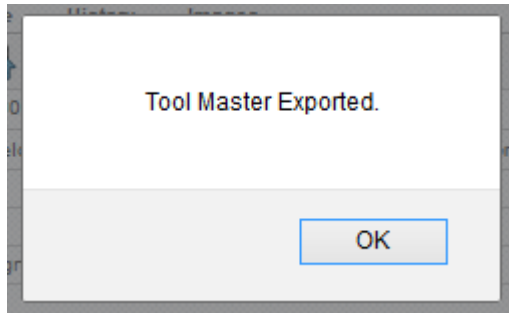
#### Step 5 Export tool serial number information to CMS

Select command Export Tool Master; the command is available only for definitive tool serial number



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When the export task is completed, the system alerts the user



In order to define the CMS where export the tool information, before exporting the information, select the field Usage Location value: Both means the tool will be exported in both CMS Malta and Egypt



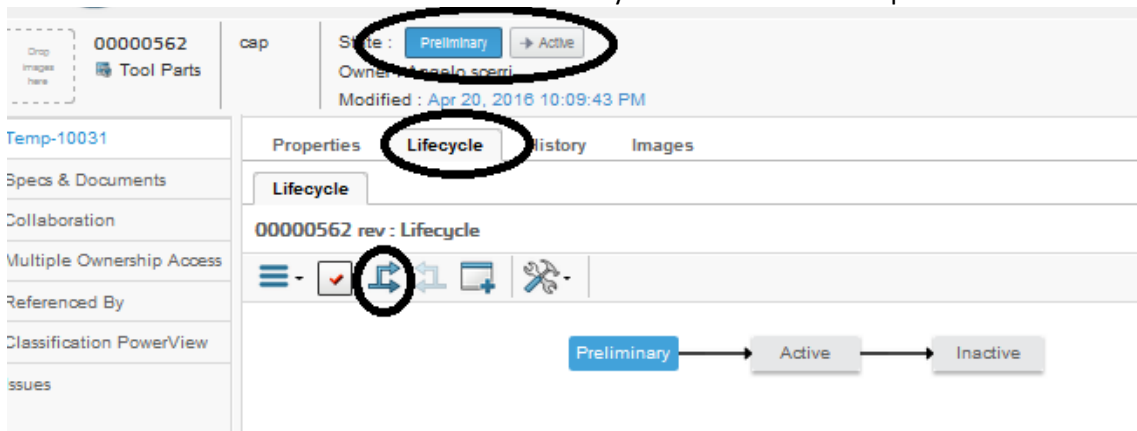
#### Step 6 The user has to promote the tool state to Active

Tool lifecycle is composed by 3 states:

- Preliminary: the tool is created with the definitive tool serial number
- Active: the tool is exported to CMS
- Inactive: the tool is no more used (tools in state Inactive are not searched by the function “Add Existing” in Tooling Definition)

In order to move the state from Preliminary to Active:

- User can select the dedicate icon in tool header
- User can select the command Lifecycle and the command promote



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Status	Released		121



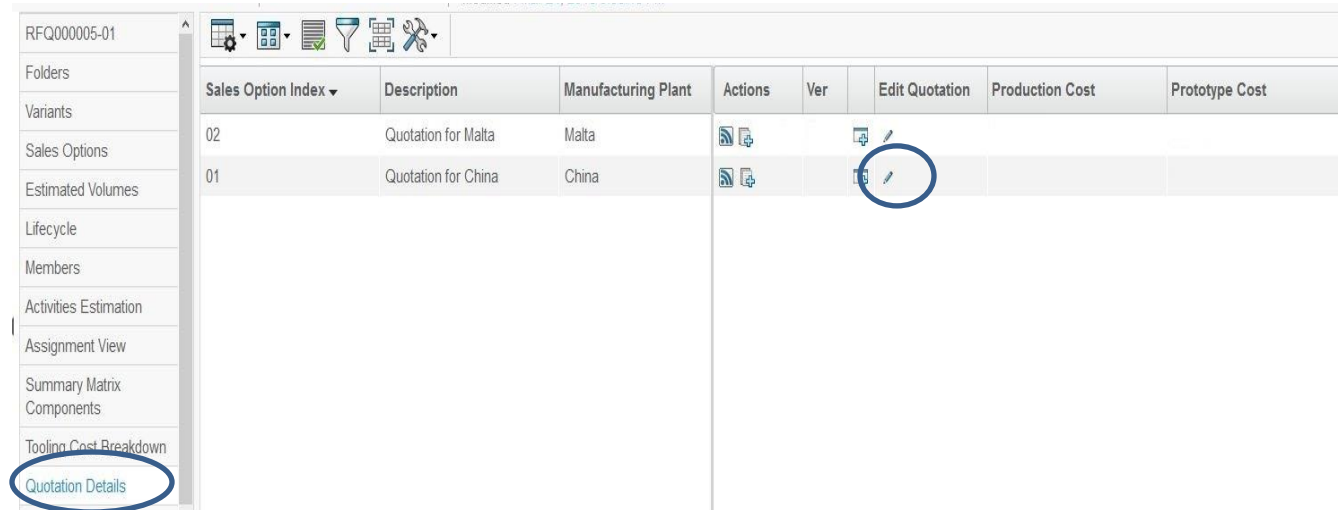
## RFQ29 Quotation definition

<b>Purpose</b>	Quotation Manager defines quotation for each sales options	<b>Status</b>	Define
<b>Stakeholders</b>	Quotation Manager		
<b>Beginning</b>	RFQ status is Quoting and Quotation tasks have been completed by the assigned users		
<b>Interactions</b>	Quotation Manager has RFQ dashboard from where he can drill down to information provided by managers, in order to provide a quote definition. Quotation Manager can decide to request a new quote, starting from RFQ status with a new revision of RFQ		
<b>End</b>	RFQ estimates are complete – the RFQ status ready for promotion to Sales Review		
<b>Constraints</b>	RFQ estimates are complete		

When all Quotation tasks are completed the RFQ package is promoted automatically to state Quoting and Quotation Manager receives a notification. Quotation Manager can search all the estimation provided by the RFQ team (eg. using Activities Estimation, Summary Matrix Components and Tooling Cost Breakdown commands). The user can also export into a csv format file the data shown like a table into the user interface and complete the quotation.

### Quotation Details form updating

#### Step 1 Select Quotation Details command from RFQ interface





Version	11	Date:	28-Nov-2017
Status	Released		122

Step 2 For each sales option, select the Edit Quotation icon

The Quotation Details page will be shown

Quotation Details

Fields in red italics are required

Details

Quotation Currency

Euro

	Comments	Production Costs	Prototype Costs
Comp. Tooling		75000	23000
Assembly Line		0	0
Lab. Testing Jigs		0	0
Total Tooling		0	0
Selling Price		Refer to Summary Mat	Refer to Summary Mat
Packaging		0	0
Freight		0	0
Duty		0	0
Capital		0	0
Amort		0	0
Timing (Wks)		0	0
Design Engineering		0	0
DV/PV Testing		0	0

Quotation Details

Done

Cancel

Version	11	Date:	28-Nov-2017
Status	Released		123

### Step 3 Fill in the Quotation information and click Done to save changes

**Quotation Details**

*Fields in red italics are required*

**Details**

Quotation Currency: Euro







	Comments	Production Costs	Prototype Costs
Comp. Tooling		75000	23000
Assembly Line		0	0
Lab. Testing Jigs		0	0
Total Tooling		0	0
Selling Price		Refer to Summary Mat	Refer to Summary Mat
Packaging		0	0
Freight		0	0
Duty		0	0
Capital		0	0
Amort		0	0
Timing (Wks)		0	0
Design Engineering		0	0
DV/PV Testing		0	0

Preliminary Response

Quotation Details

**Done** Cancel

When the information will be filled in for all Sales Option the Quotation Details interface will show a summary of quotation

Sales Option In	Description	Manufacturing Plant	Actions	Ver	Edit Quotation	Production Cost	Prototype Cost
02	Quotation for Malta	Malta				75000	23000
01	Quotation for China	China				64500	24000

Version	11	Date:	28-Nov-2017
Status	Released		124

## Quotation Details document uploading

### Step 1 Select Quotation Details command from RFQ interface

The screenshot shows the RFQ000005-01 interface. On the left, a sidebar lists various options: Folders, Variants, Sales Options, Estimated Volumes, Lifecycle, Members, Activities Estimation, Assignment View, Summary Matrix, Components, Tooling Cost Breakdown, and Quotation Details. The 'Quotation Details' option is circled in blue. The main area displays a table with columns: Sales Option Index, Description, Manufacturing Plant, Actions, Ver, Edit Quotation, Production Cost, and Prototype Cost. Two rows are visible: 02 (Quotation for Malta, Malta) and 01 (Quotation for China, China).

### Step 2 For each sales option, select the Update icon

The screenshot shows the same RFQ interface as Step 1. In the 'Actions' column, the 'Update' icon (a document with a plus sign) is circled in blue for both sales options (02 and 01).

The Checkin Files page will be shown

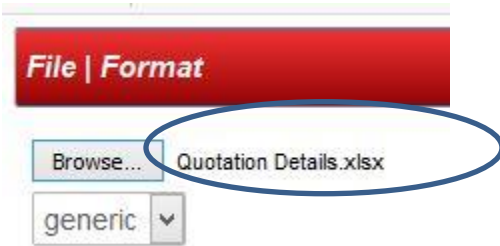
The 'Checkin Files' dialog box is shown. It has a 'File | Format' tab and a 'Comments' column. There are four rows, each with a 'Browse...' button, a 'No file selected.' message, a 'generic' dropdown menu, and a text area for comments. At the bottom, there are 'Done' and 'Cancel' buttons.

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Status	Released		125

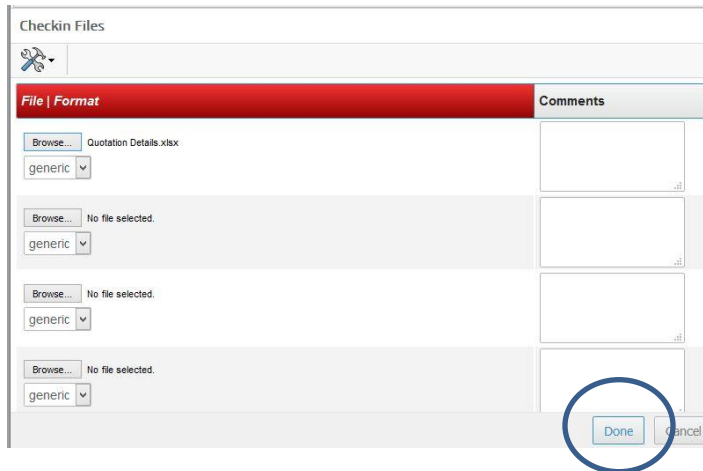
Step 3 Click Browse command and select the file to be uploaded from the file system



The file name will be shown into the page













Step 4 Click Done to finalized the Document generation






Version	11	Date:	28-Nov-2017
Status	Released		126



Step 5 Click the hyperlink into Version cell to show the document

Sales Option Index ▾	Description	Manufacturing Plant	Actions	Ver	Edit Quotation	Production Cost	Prototype Cost
02	Quotation for Malta	Malta	   	<a href="#">1</a>		75000	23000
01	Quotation for China	China	   	<a href="#">1</a>		64500	24000

The File page will be shown

RFQ000005-02: File Versions   Title:   rev:RFQ000005-01							
Ver	File Name	Originated	Comments	Owner	Format	File Size	Actions
1	 000133.xlsx	Dec 1, 2015 4:33:57 PM		William Galea	generic	10.47 KB	 

Step 6 Click the Download icon to download the file

RFQ000005-02: File Versions   Title:   rev:RFQ000005-01							
Ver	File Name	Originated	Comments	Owner	Format	File Size	Actions
1	 000133.xlsx	Dec 1, 2015 4:33:57 PM		William Galea	generic	10.47 KB	 

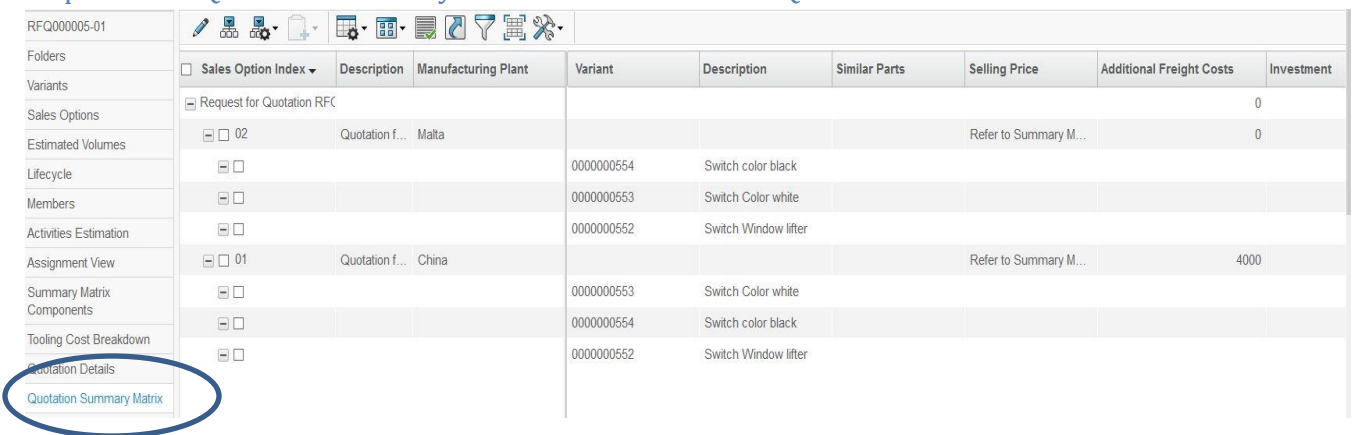
Version	11	Date:	28-Nov-2017
Status	Released		127

## RFQ30 Quotation Summary Matrix

<b>Purpose</b>	Quotation Manager perform quotation calculations	<b>Status</b>	Define
<b>Stakeholders</b>	Quotation Manager		
<b>Beginning</b>	RFQ status is Quoting and Quotation tasks have been completed by users assigned		
<b>Interactions</b>	Quotation Manager can upload quotation documents used by Sales Manager with Customers		
<b>End</b>	RFQ estimates are complete		
<b>Constraints</b>	RFQ estimates are complete		

Quotation calculations will be carried out offline outside PLM. Therefore all the information collected for the RFQ (CBOMs, Assembly line info, testing info) will be exported into an Excel template for the Quotation manager. Once the quotation calculations are completed the RFQ should be able to capture the quotation totals

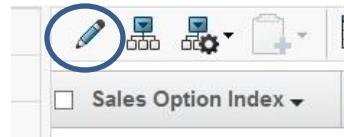
### Step 1 Select Quotation Summary Matrix command from RFQ interface



The screenshot shows the RFQ interface with the left sidebar expanded. The 'Quotation Summary Matrix' option is highlighted with a blue circle. The main table displays data for 'Request for Quotation RFC' with columns: Sales Option Index, Description, Manufacturing Plant, Variant, Description, Similar Parts, Selling Price, Additional Freight Costs, and Investment.

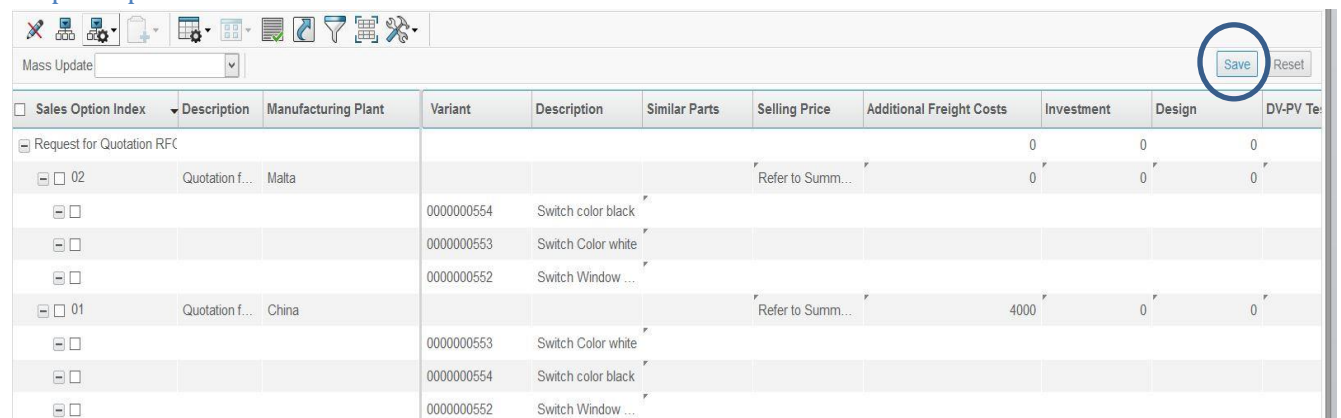
Sales Option Index	Description	Manufacturing Plant	Variant	Description	Similar Parts	Selling Price	Additional Freight Costs	Investment
Request for Quotation RFC								
02	Quotation f... Malta					Refer to Summary M...		0
			0000000554	Switch color black				
			0000000553	Switch Color white				
			0000000552	Switch Window lifter				
01	Quotation f... China					Refer to Summary M...		4000
			0000000553	Switch Color white				
			0000000554	Switch color black				
			0000000552	Switch Window lifter				

### Step 2 Click the Edit icon to enable the Edit View



The screenshot shows the top toolbar of the RFQ interface. The Edit icon (pencil) is highlighted with a blue circle. Below the toolbar, the 'Sales Option Index' dropdown is visible.

### Step 3 Update the information value and click Save to finalized

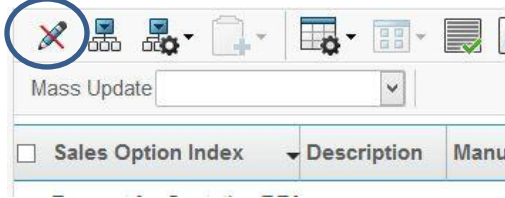


The screenshot shows the RFQ interface with the 'Save' button highlighted with a blue circle. The table displays data for 'Request for Quotation RFC' with columns: Sales Option Index, Description, Manufacturing Plant, Variant, Description, Similar Parts, Selling Price, Additional Freight Costs, Investment, Design, and DV-PV Te.

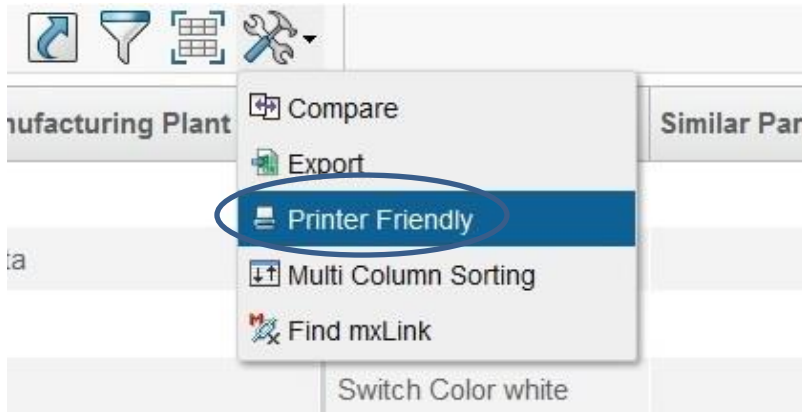
Sales Option Index	Description	Manufacturing Plant	Variant	Description	Similar Parts	Selling Price	Additional Freight Costs	Investment	Design	DV-PV Te
Request for Quotation RFC										
02	Quotation f... Malta					Refer to Summ...		0	0	0
			0000000554	Switch color black				0	0	0
			0000000553	Switch Color white						
			0000000552	Switch Window ...						
01	Quotation f... China					Refer to Summ...		4000	0	0
			0000000553	Switch Color white						
			0000000554	Switch color black						
			0000000552	Switch Window ...						

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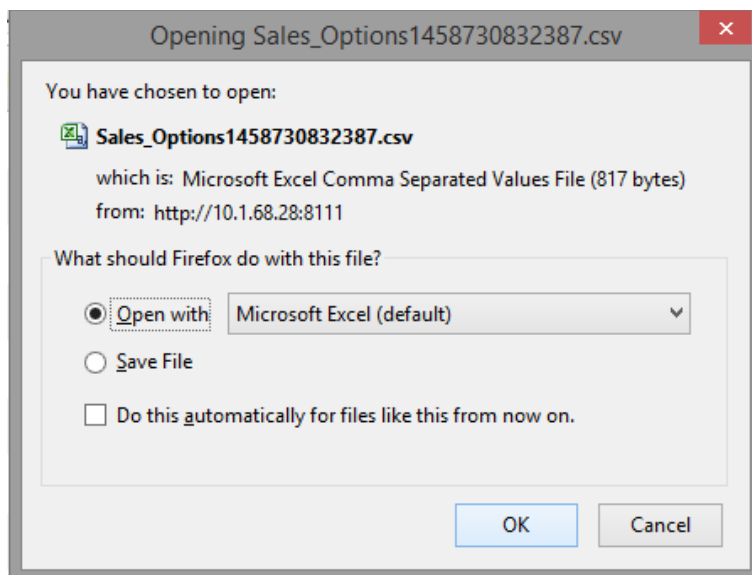
Step 4 Click the Edit icon to disable the Edit View



Step 5 Click Printer Friendly command from Tools Menu to extract the information shown into the User Interface in Excel file format



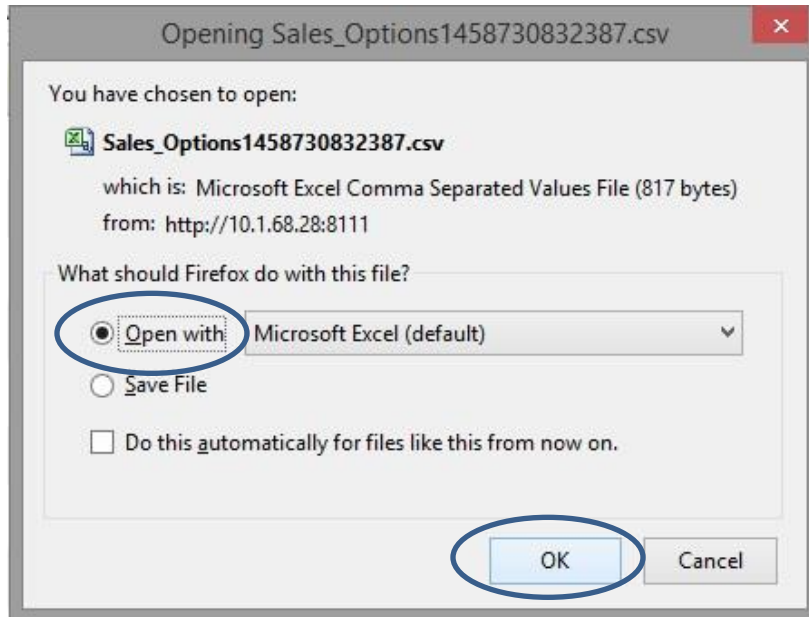
The following message will be shown



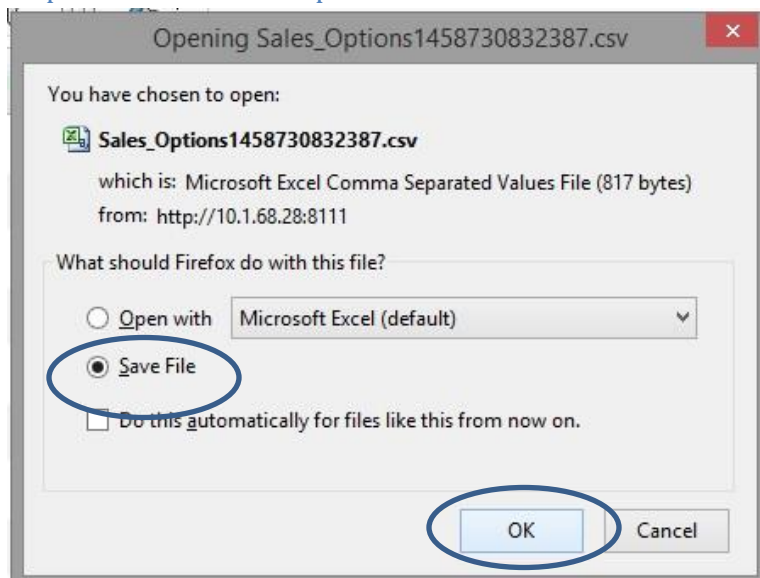
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Step 6a Select Open with option and Click OK command to directly open the file



Step 6b Select Save File option and Click OK command to Save the file into file system



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The Quotation Manager will use the excel file to complete the quotation information, also adding other column of info, and share them to Sales Manager

In order to complete the quotation, the Quotation Manager can also extract data from Summary Matrix Components user interface and data also provided by others team and available in other user interface like Activities Estimation and Tooling Cost Breakdown. The command to be used will be always the Printer Friendly available into Tools menu in each user interface

RFQ000005-01								
Folders								
Variants								
Sales Options								
Estimated Volumes								
Lifecycle								
Members								
Activities Estimation								
Assignment View								
Summary Matrix Components								
Tooling Cost Breakdown								
Quotation Details								
Quotation Summary Matrix								

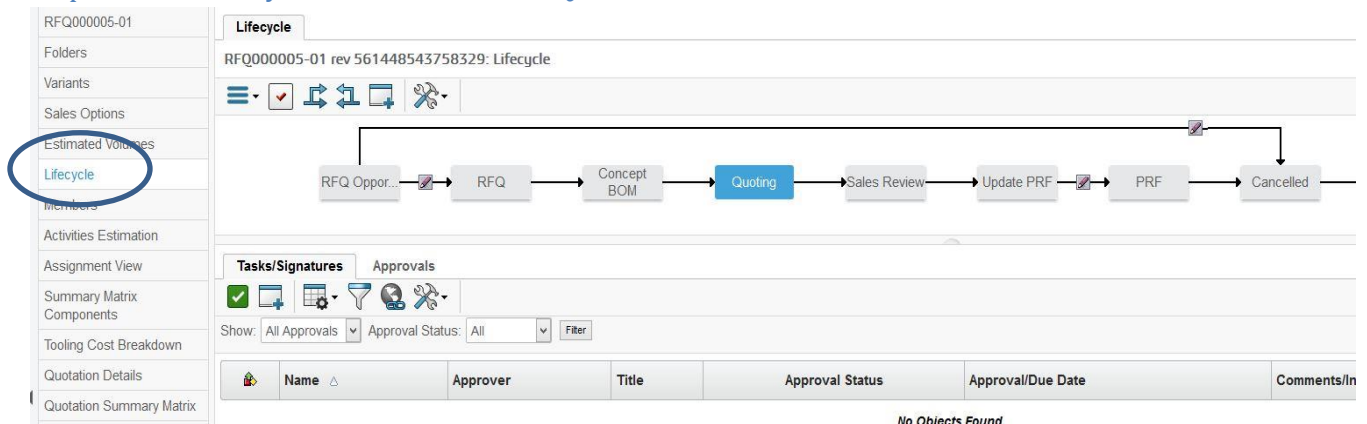
  

Sales Option Index	Description	Manufacturing Plant	Variant	Description	Similar Parts	Selling Price	Additional Freight Costs	Investment
Request for Quotation RFC								0
02	Quotation f... Malta					Refer to Summary M...		0
			0000000554	Switch color black				
			0000000553	Switch Color white				
			0000000552	Switch Window lifter				
01	Quotation f... China					Refer to Summary M...		4000
			0000000553	Switch Color white				
			0000000554	Switch color black				
			0000000552	Switch Window lifter				

## Move the RFQ lifecycle to Sales Review state

### From lifecycle interface

#### Step 1a Select Lifecycle command from RFQ interface

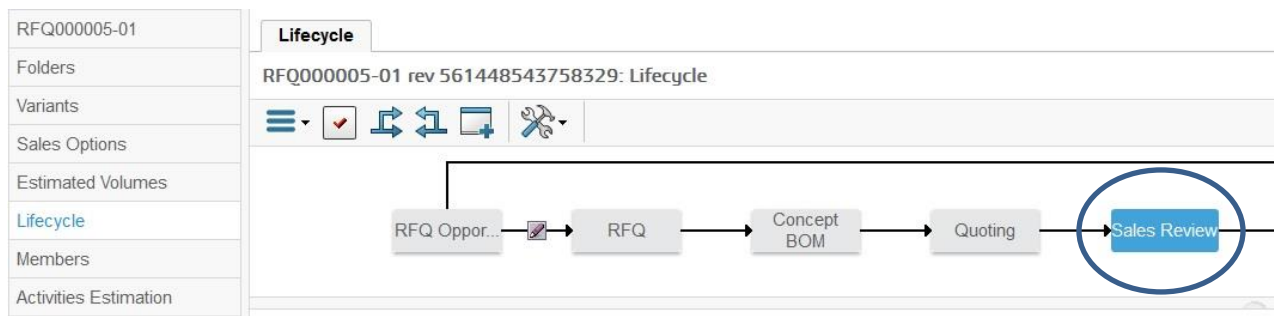


#### Step 2a Click the Promote icon to promote the lifecycle



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The lifecycle will be moved to Sales Review state



A notification will be sent to Sales Manager

### From RFQ interface

Step 1b Click the Sales Review state tab from RFQ upper page

The screenshot shows the RFQ000005-01 interface. The 'Sales Review' state tab is selected and circled in blue. The interface includes a sidebar with navigation options (Folders, Variants, Sales Options, Estimated Volumes, Lifecycle, Members, Activities Estimation) and a main area with details for the RFQ, including Issue Date (Nov 26, 2015), Customer Name (FCA), Program/Platform # (X152), and Customer Part # (FCA.555).

The lifecycle will be moved to Sales Review state

The screenshot shows the RFQ000005-01 interface with the 'Sales Review' state tab selected and circled in blue. The interface includes a sidebar with navigation options (Folders, Variants, Sales Options, Estimated Volumes, Lifecycle, Members, Activities Estimation, Assignment View, Summary Matrix Components, Tooling Cost Breakdown, Quotation Details) and a main area with details for the RFQ, including Issue Date (Nov 26, 2015), Customer Name (FCA), Program/Platform # (X152), Customer Part # (FCA.555), Current Price (0.0 Dollar), Quotation Currency (Euro), Quote Type (New Product), and Program Lifetime (5).

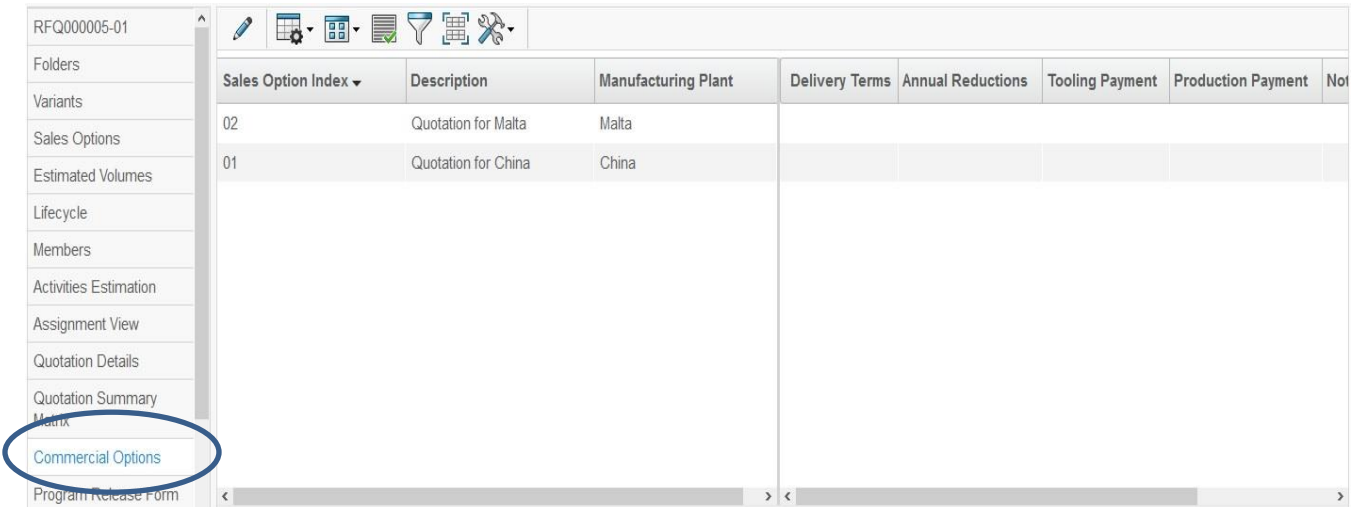
A notification will be sent to Sales Manager

Version	11	Date:	28-Nov-2017
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## RFQ31 Commercial Options definition

<b>Purpose</b>	Sales Manager can define commercial option for each sales option	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ has moved to status Sales Review, Quotation tasks have been completed by assigned users assigned and Quotation Manager has completed the quotation phase.		
<b>Interactions</b>	Sales Manager can create several Commercial Options for each Sales Option contained in the RFQ		
<b>End</b>	Quotation definition is completed with commercial options		
<b>Constraints</b>	RFQ quotations are complete		

### Step 1 Select Commercial Option command from RFQ interface



### Step 2 Click the Edit icon to enable the Edit View



### Step 2 Fill the main info for the Commercial Option (e.g. Delivery Term, Annual Reduction, etc.) and click Save to save changes

<div> </div> <div> Mass Update <input type="text"/> <span>Save</span> <span>Reset</span> </div>								
Sales Option Index	Description	Manufacturing	Delivery Terms	Annual Reductions	Tooling Payment	Production Payment	Notes/Comments	Options
02	Quotation for M...	Malta	60 days	2.5%	150000	8000		
01	Quotation for C...	China	60 days	2.5%	180000	8000		

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Step 7 Click the Edit icon to disable the Edit View












Define additional commercial options for each Sales Option. The new options will be managed as text.

Step 1 Click the Commercial Option icon related to the specific Sales Option

Sales Option Index	Description	Manufacturing	Delivery Terms	Annual Reductions	Tooling Payment	Production Payment	Notes/Comments	Options
02	Quotation for M...	Malta	60 days	2.5%	150000	8000		
01	Quotation for C...	China	60 days	2.5%	180000	8000		

The Commercial Options page will be shown





Commercial Options

Create Option










Name ▲	Description
No Objects Found	

Step 1 Click Create Option command from the toolbar

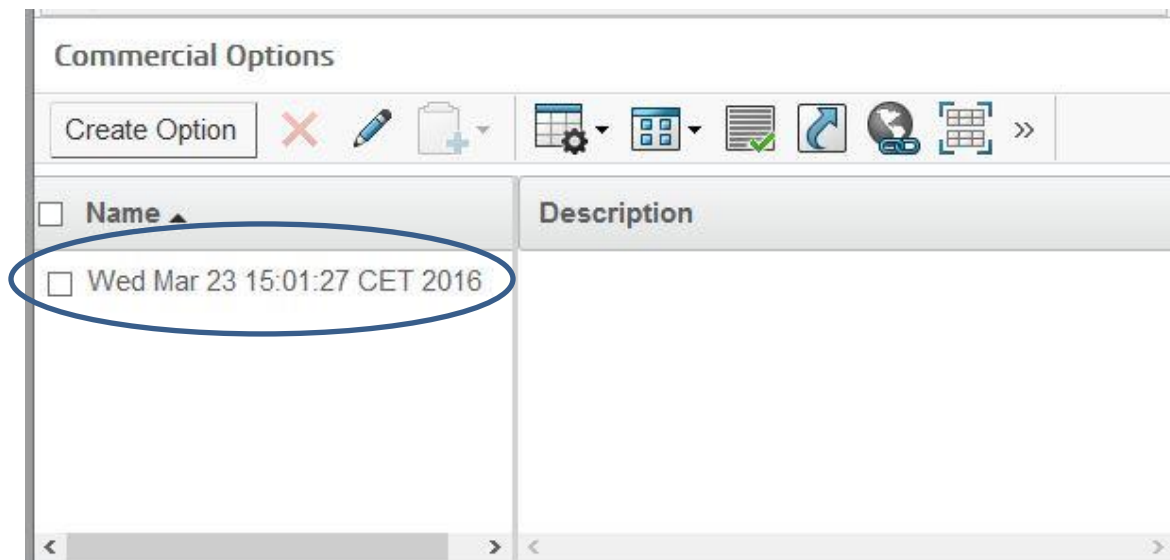
Commercial Options

Create Option





Name ▲	Descrip
--------	---------

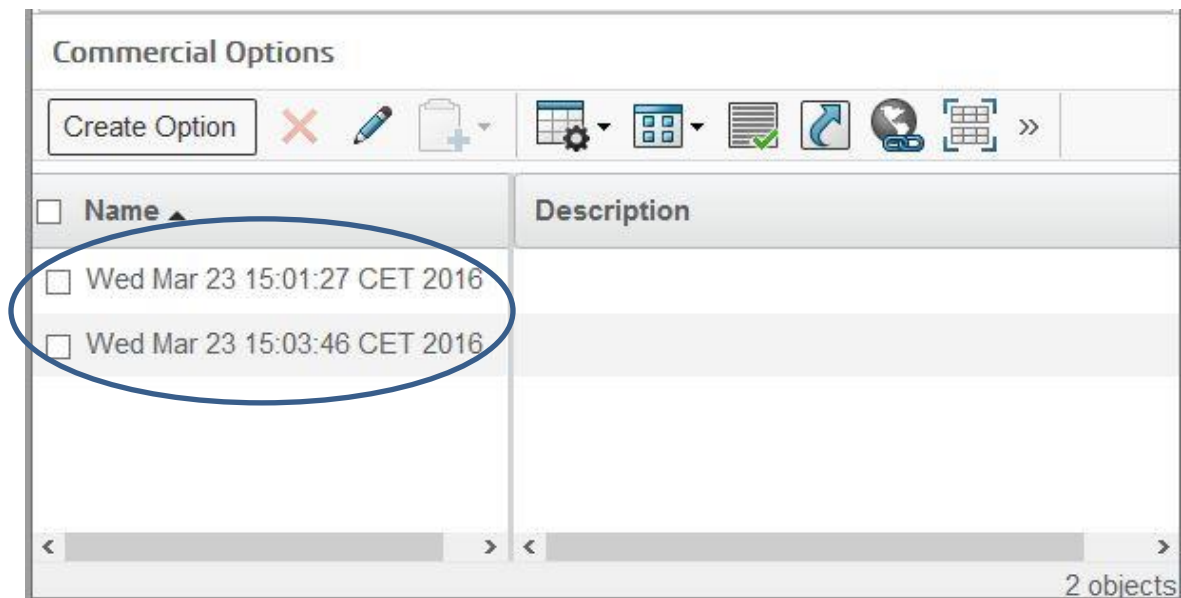
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The Commercial Option will be define

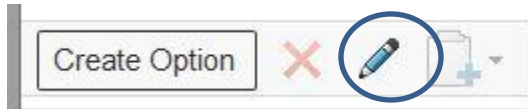


Step 2 Click Create Option command from the toolbar in order to define all the additional options need to be defined

The other Commercial Option will be define



Step 3 Click the Edit icon to enable the Edit View



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Status	Released		135





## RFQ32 Customer quotation documents upload

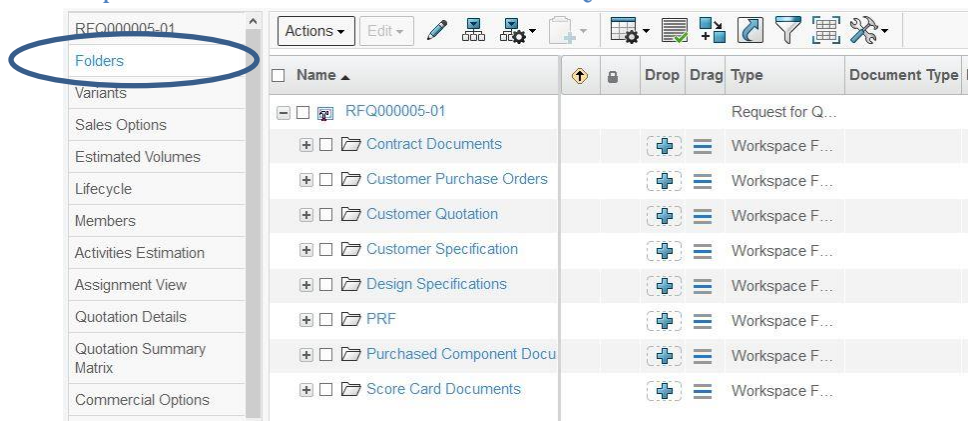
<b>Purpose</b>	Upload all the documents sent to the customer into PLM	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state Sales Review		
<b>Interactions</b>	Sales Manager provides quotation documents to the customer. Sales Manager has to be upload documents in a folder "Customer Quotation"		
<b>End</b>	RFQ is related to customer quotation documents		
<b>Constraints</b>			

A set of predefined folders is generated during RFQ creation.


Sales Manager can upload customer quotation documents in appropriate folder using drag-and-drop functionality.

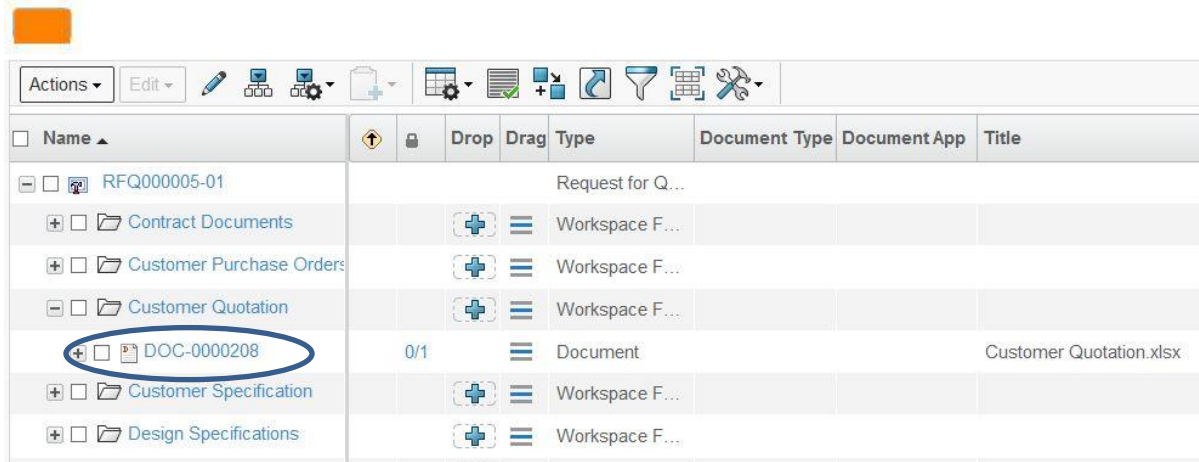
The generated document can be classified using a drop-down list of predefined values.

### Step 1 Select Folders command from RFQ interface



### Add Document using Drag and Drop

Step 2a Select the file from the file system and drop it with the mouse over the  icon related to the specific folder. Then release the mouse in order to start the document encoding. The icon becomes orange



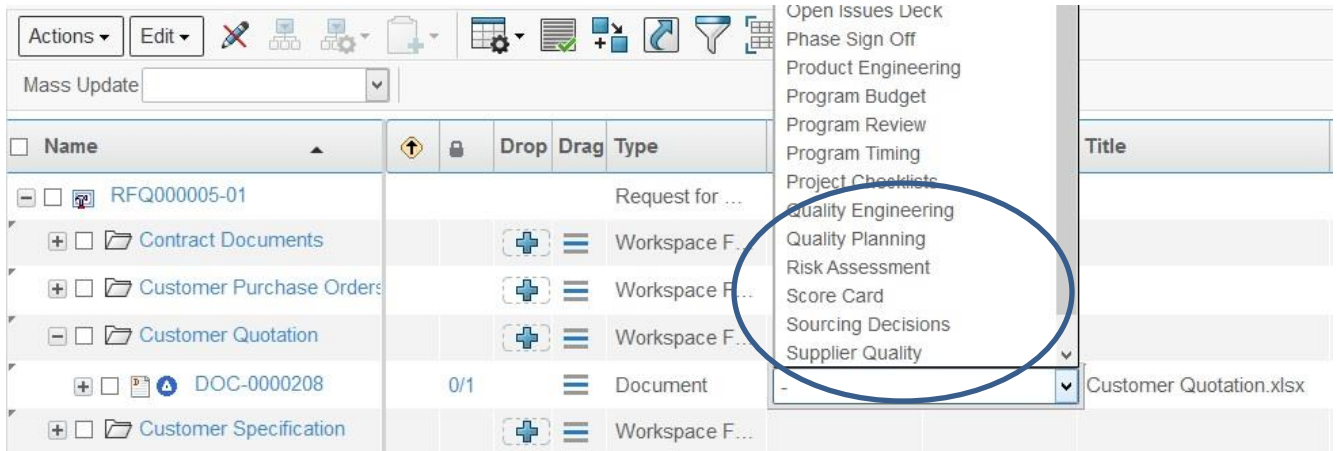
Version	11	Date:	28-Nov-2017
Status	Released		137



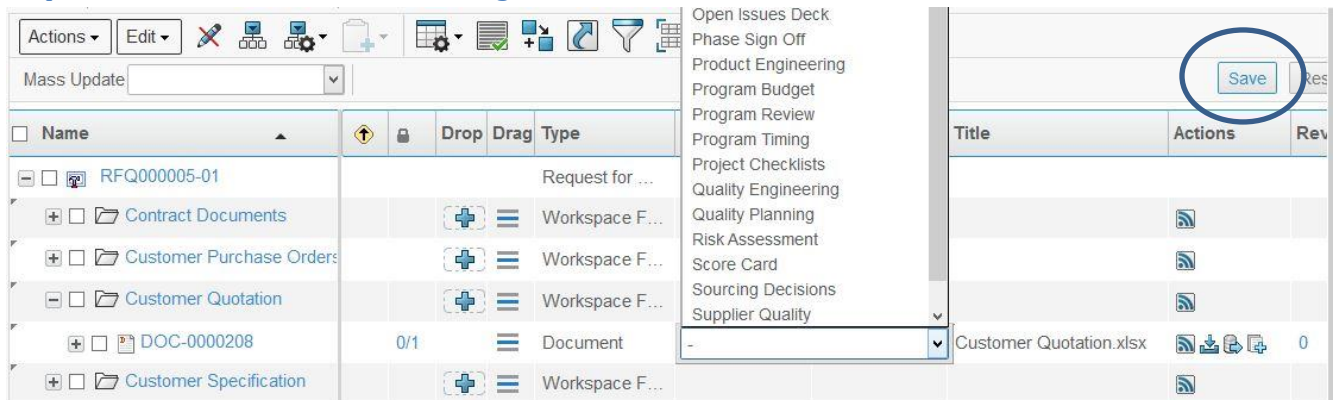
Step 3a Click the Edit icon to enable the Edit View



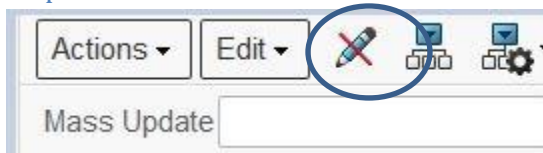
Step 4a Select a document type from the combo



Step 5a Click Save in order to save changes



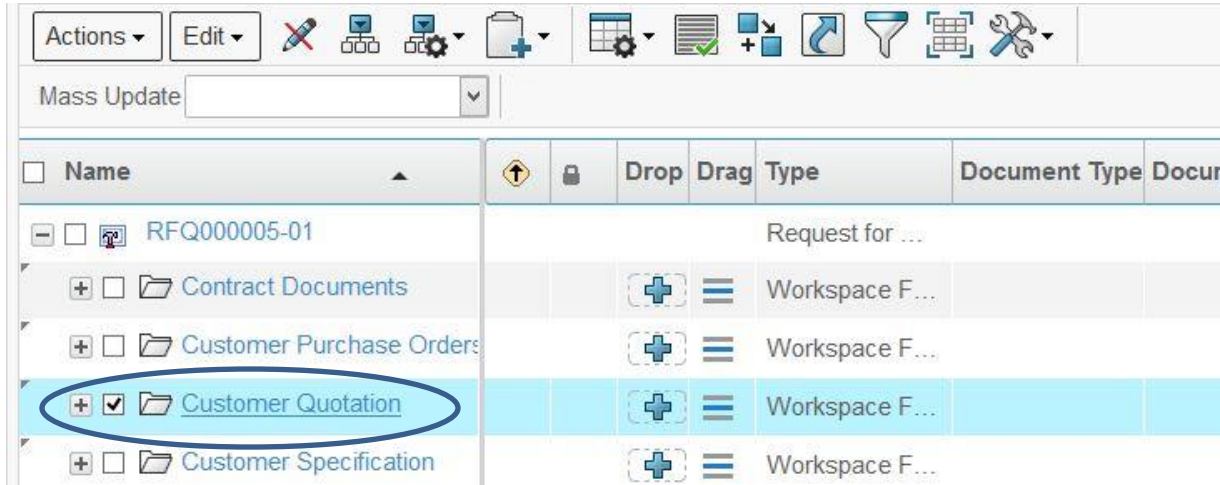
Step 6a Click the Edit icon to disable the Edit View



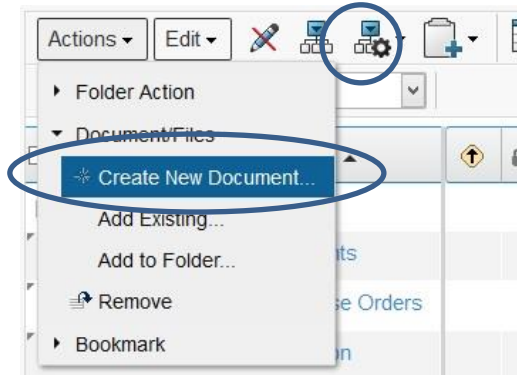
Version	11	Date:	28-Nov-2017
Status	Released		138

## Add Document using Create New Document functionality

Step 2b Select the Folder the document has to be added to



Step 3b Click Create New Document command from Actions menu



The Specify Details page will be shown

Step 1 of 2: Specify Details

*Fields in red italics are required.*

**Name**  ☒ AutoName

**Type**  ...

**Policy**  ...

**Title**

**Description**

**Access Type**  ...

**Document Approver Role**

**Document Type**

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Step 4b Fill in the Title, Description and the Document Type and click Next

Step 1 of 2: Specify Details

*Fields in red italics are required.*

**Name**  ☒ AutoName

**Type**  ..

**Policy**  ▾

**Title**

**Description**

**Access Type**  ▾

**Document Approver Role**  ▾

**Document Type**  ▾

The Upload Files page will be shown

Step 2 of 2: Upload Files

File   Format	Comments
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>
<input type="button" value="Browse..."/> No file selected. <input type="text" value="generic"/> ▾	<input type="text"/>

Step 5b Click Browse command and select the file to be uploaded from the file system

**File | Format**

No file selected.

▾

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The file name will be shown into the page

The screenshot shows a 'File | Format' menu. Below the menu, there is a 'Browse...' button and a text field containing 'Customer Quotation.xlsx'. Below this is a dropdown menu currently set to 'generic'.

### Step 6b Click Done to finalized the Document generation

The screenshot shows a dialog titled 'Step 2 of 2: Upload Files'. It contains a 'File | Format' section with a 'Browse...' button and a text field showing 'img188.jpg'. Below this is a dropdown menu set to 'generic'. There are three more identical sections below. At the bottom right, there are three buttons: 'Previous', 'Done' (which is circled in blue), and 'Cancel'.

The Document will be generated and added under the selected Folder

The screenshot shows a document management interface. At the top, there is a toolbar with various icons and a 'Mass Update' dropdown. Below the toolbar is a table with the following columns: Name, Drop, Drag, Type, Document Type, Document Appr, and Title. The table contains several rows, including folders like 'Contract Documents', 'Customer Purchase Orders', and 'Customer Quotation' (which is selected). Below the folders, there are two document entries: 'DOC-0000208' and 'DOC-0000209', both of which are circled in blue. The 'DOC-0000209' row shows a status of '0/1' and a type of 'Document'.

Name	Drop	Drag	Type	Document Type	Document Appr	Title
RFQ000005-01			Request for ...			
Contract Documents			Workspace F...			
Customer Purchase Orders			Workspace F...			
Customer Quotation			Workspace F...			
DOC-0000208	0/1		Document			Customer Quotation.xlsx
DOC-0000209	0/1		Document			Customer Quotation
Customer Specification			Workspace F...			

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## RFQ33 RFQ accepted by customer / Re-quote decision

<b>Purpose</b>	Sales Manager sends a portion of RFQ package to Customer Customer can accept proposal or request for a new quotation	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager and other manager		
<b>Beginning</b>	RFQ is in state Sales Review		
<b>Interactions</b>	Sales Manager, using RFQ information and deliverables, sends a package to Customer		
<b>End</b>	Sales Manager can promote RFQ to status PRF if proposal is accepted, can request a new quote if Customer doesn't accept proposal, can cancel RFQ if Customer proposal is not allowed		
<b>Constraints</b>			

Sales Manager can search all estimation and quotation information prepared by Quotation Manager and can prepare a package containing commercial documents for Customer (this activity is performed outside PLM).

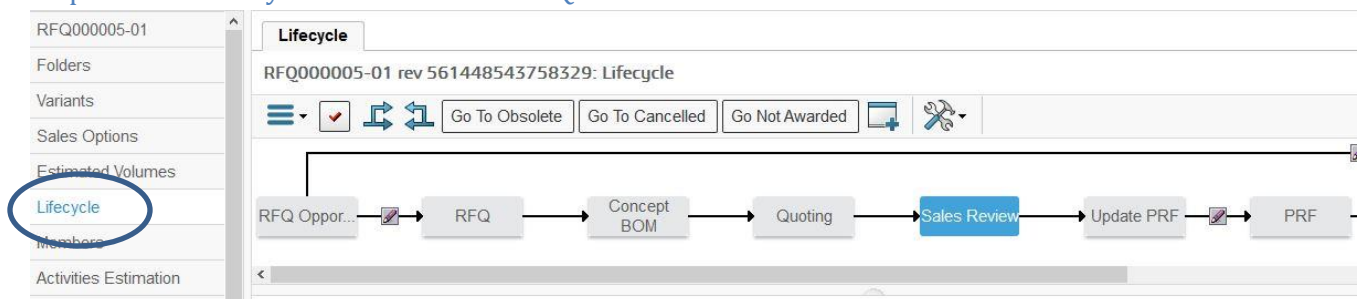
Available options:

1. Customer can accept proposal, means RFQ will be promoted to status Update PRF, in order to review RFQ before PRF approval.
2. If Customer rejects the proposal, RFQ will be promoted to status Not Awarded (see "RFQ Not Awarded").
3. If Methode decides to cancel the RFQ package, RFQ will be promoted to status Cancelled (see "RFQ Cancelled").
4. Customer can asks for a re-quote, means RFQ package will be revised (see "RFQ Revision").

**Option 1** The Quotation has been accepted by the customer. Move the RFQ lifecycle to Update PRF state

**From lifecycle interface**

**Step 1a** Select Lifecycle command from RFQ interface

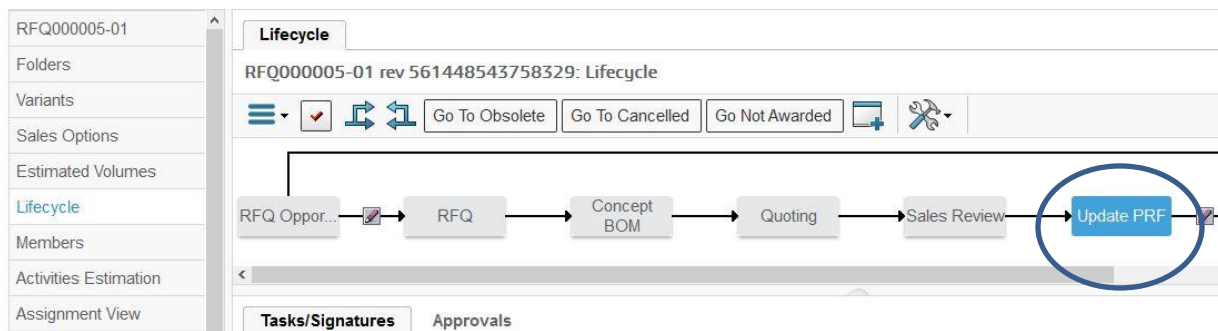


**Step 2a** Click the Promote icon to promote the lifecycle



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The lifecycle will be moved to Update PRF state



A notification will be sent to Sales Manager RFQ owner

### From RFQ interface

Step 1b Click the Update PRF state tab from RFQ upper page

RFQ000005-01 New quotation for switch Alfa

State: Quoting Sales Review Update PRF

Owner: kevinb

Modified: Mar 23, 2016 2:24:01 PM

Details

Issue Date	Nov 26, 2015	Due Date	Dec 10, 2015
Customer Name	FCA	Customer Documentation Reference	Customer Require Customer Standar X152-EPB-ROOF

The lifecycle will be moved to Update PRF state

RFQ000005-01 New quotation for switch Alfa

State: Sales Review Update PRF PRF

Owner: kevinb

Modified: Mar 23, 2016 2:24:01 PM

Details

Issue Date	Nov 26, 2015	Due Date	Dec 10, 2015
Customer Name	FCA	Customer Documentation Reference	Customer Require Customer Standar X152-EPB-ROOF
Program/Platform #	X152	Vehicle Model Year	

A notification will be sent to Sales Manager RFQ owner

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Option 2      The RFQ is Not Awarded: move the RFQ lifecycle to Not Awarded state  
Follow the step described into chapter “RFQ37 RFQ Not Awarded”

Option 3      The RFQ is Cancelled: move the RFQ lifecycle to Cancelled state  
Follow the step described into chapter “RFQ36 RFQ Cancelled”

Option 4      RFQ has to be revised  
Follow the step described into chapter “RFQ35 RFQ Revision”

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## RFQ34 Update PRF

<b>Purpose</b>	Sales Manager completes RFQ with Product Release Form; upload also documents provided by Customer into PLM, as reference	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state Update PRF		
<b>Interactions</b>	RFQ has been accepted by Customer; Sales Manager promotes RFQ to status Update PRF, upload documents provided by Customer in folder “Contract Documents”, remove Sales Options and Commercial Options not accepted by Customer and notify the Quotation Manager.		
<b>End</b>	RFQ is ready for promotion to status Program Released (PRF)		
<b>Constraints</b>			

The state “Update PRF” of RFQ is managed by Sales Manager because the RFQ package needs to be updated with what was sold.

The information has to be update into Program Release Form and additional documentation can be uploaded like Contract or Customer Purchase Orders.

If RFQ package has to be updated in order to remove options not accepted, Sales Manager can create a new revision of RFQ (see “RFQ Revision”; in this case the new revision is created in state “Update PRF”), select the new revision and remove Sales Options and Commercial Options not accepted (see “Remove Sales Options definition” and “Commercial Option definition”). Using this approach, the previous RFQ revision contains all options prepared for Customer, whereas last RFQ revision contains only options accepted.

### RFQ Program Release information updating

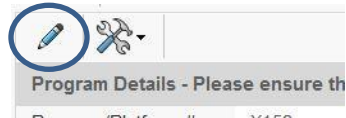
#### Step 1 Select Program Release Form command from RFQ interface

<a href="#">RFQ000005-01</a>			
Folders	Program Details - Please ensure that all the fields are filled in.		
Variants	Program/Platform #	X152	Project Release Date
Sales Options	RFQ #	RFQ000005-01	Production
Estimated Volumes	Customer Name	FCA	Prototype
Lifecycle	Customer Documentation Reference	<a href="#">Customer Requirements</a> <a href="#">Customer Standards</a> <a href="#">X152-EPB-ROOF-SPEC-v1.2 18-01-11.doc</a>	Vehicle Model Year
Members	Customer Part #	FCA.555	Part Description
Activities Estimation			Switches for door and window lifter
Assignment View	Methode Part #	0000000552 0000000553 0000000554	
Quotation Details			
Quotation Summary Matrix			
Commercial Options	Estimated Annual Volume		Program Lifetime
<a href="#">Program Release Form</a>	PSW Date		Start of Production
Routes	Quoted Costs - Please ensure that the cost approved by the customer is filled in correctly.		
Images	Production Unit Cost	0.0 Dollar	Prototype Unit Cost
Reports	Production Tooling	0.0 Dollar	Prototype Tooling
	D&D		Lifetime Conditions
	Payment Terms		Delivery Terms
	Notes/Comments		

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## Step 2 Click the Edit icon to enable the Edit View



## Step 3 Update the RFQ information and click Done to save changes

Request for Quotation RFQ000005-01 rev 561448543758329: Properties

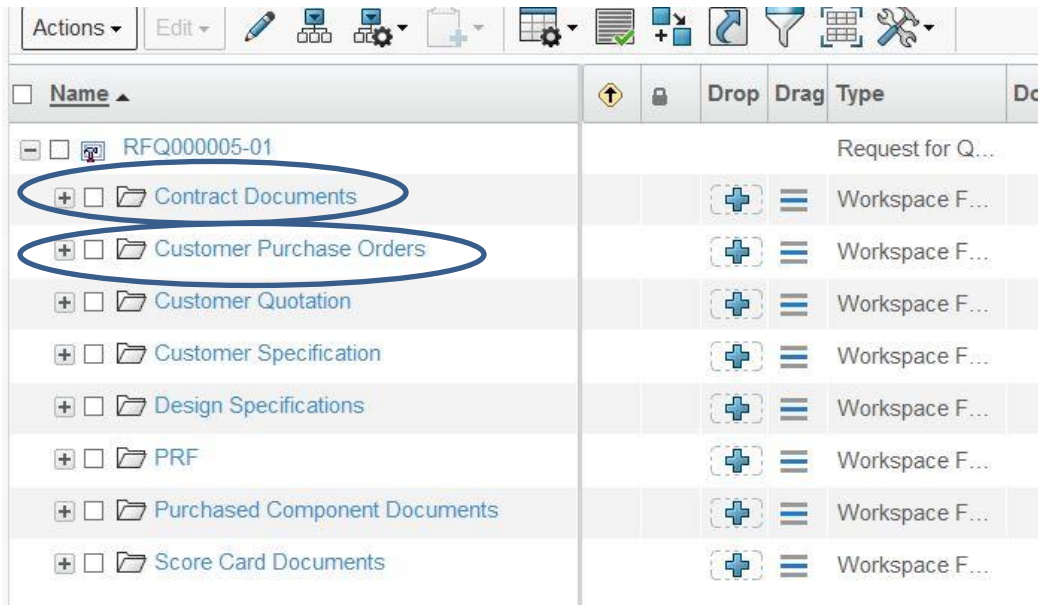
RFQ #	RFQ000005-01	Production	<input type="checkbox"/>
Customer Name	FCA	Prototype	<input type="checkbox"/>
Customer Documentation Reference	<a href="#">Customer Requirements</a> <a href="#">Customer Standards</a> <a href="#">X152-EPB-ROOF-SPEC-v1.2 18-01-11.doc</a>	Vehicle Model Year	
Customer Part #	FCA 555	Part Description	Switches for door and window lifter
Methode Part #	0000000552 0000000553 0000000554		
Estimated Annual Volume	<input type="text"/>	Program Lifetime	5
PSW Date	<input type="text"/>	Start of Production	Nov 1, 2017
Quoted Costs - Please ensure that the cost approved by the customer is filled in correctly.			
Production Unit Cost	<input type="text" value="0.0"/> Dollar	Prototype Unit Cost	<input type="text" value="0.0"/> Dollar
Production Tooling	<input type="text" value="0.0"/> Dollar	Prototype Tooling	<input type="text" value="0.0"/> Dollar
D&D	<input type="text"/>	Lifetime Conditions	<input type="text"/>
Payment Terms	<input type="text"/>	Delivery Terms	<input type="text"/>
Notes/Comments	<input type="text"/>		

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## Documentation like Contract or Customer Purchase Orders uploading

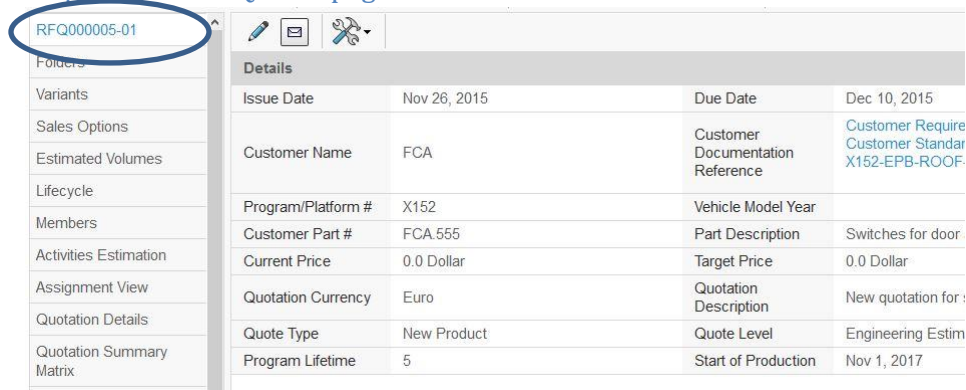
Following the same step described into “RFQ30 Customer quotation documents upload” item using as specific folder

- Contract Documents
- Customer Purchase Orders



## Quotation Manager notification

### Step 1 Select RFQ main page

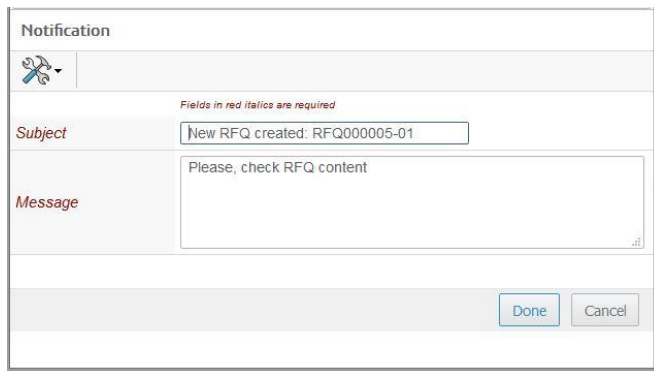


### Step 2 Select theMail Icon from the toolbar



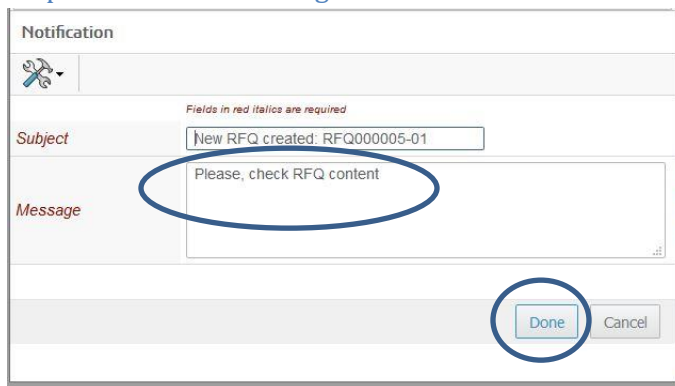
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The Notification page will be shown



The screenshot shows a 'Notification' form with a title bar and a toolbar. Below the toolbar, a message states 'Fields in red italics are required'. The 'Subject' field contains the text 'New RFQ created: RFQ000005-01'. The 'Message' field contains the text 'Please, check RFQ content'. At the bottom right, there are 'Done' and 'Cancel' buttons.

Step 3 Refine the Message text and click Done



This screenshot is identical to the previous one but includes annotations. A blue oval highlights the text 'Please, check RFQ content' in the 'Message' field. Another blue oval highlights the 'Done' button at the bottom right.

The notification will be sent to Quotation Manager

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Status	Released		148

## RFQ35 PRF document definition and uploading

<b>Purpose</b>	Sales Manager completes RFQ with Product Release Form; upload also documents provided by Customer into PLM, as reference	<b>Status</b>	Define
<b>Stakeholders</b>	Quotation Manager		
<b>Beginning</b>	RFQ is in state Update PRF		
<b>Interactions</b>	RFQ is accepted by Customer; Quotation manager reviews the RFQ package information, generates the PRF document and upload it to the PLM		
<b>End</b>	Quotation Manager can promote the RFQ to state PRF		
<b>Constraints</b>			

### Define PRF document

#### Step 1 Select Report command from RFQ interface

The screenshot shows the RFQ interface with a sidebar on the left containing various menu items. The 'Reports' item is circled in blue. The main area displays a 'Select Report' dialog with a table containing one report entry.

	Report	Description	Output Format
1.	PDS_RPT_PRF_Report_JPO	This JPO PDF report for Program Release Form	PDF

#### Step 2 Click the hyperlink into the Report column to start the report generation

The screenshot shows the 'Select Report' dialog with the report name 'PDS\_RPT\_PRF\_Report\_JPO' circled in blue.

	Report	Description
1.	PDS_RPT_PRF_Report_JPO	This JPO PDF report for Program Release Form

The Report Generator Page will be opened in In Work status

The screenshot shows the ENOVIA Report Generator page. The 'Status' field is circled in blue and displays 'In work'.


<b>ENOVIA Report Generator</b>	
Please wait while the report is being created	
Report Name	PDS_RPT_PRF_Report_JPO (PDF)
Status	In work
Duration	0 Minutes, 0 Seconds
Cancel	

Version	11	Date:	28-Nov-2017
Status	Released		149

Wait until the report generation is completed. The Status field becomes Download Report field

**ENOVIA Report Generator**

Click on the link below to download the report


Report Name	PDS_RPT_PRJ_Report_IPO
Download Report	 <a href="#">Report (7.8kB)</a>
Total Duration	0 Minutes, 3 Seconds


 Close

Step 3 Click the hyperlink into Download Report field to show or download the file into an Acrobat plugin

**ENOVIA Report Generator**

Click on the link below to download the report

Report Name	PDS_RPT_PRJ_Report_IPO
Download Report	 <a href="#">Report (7.8kB)</a>
Total Duration	0 Minutes, 3 Seconds

 Close

The file will be shown into an Acrobat plugin

**PRF - Program Release Form**

The PRF originator shall confirm with Program Quoting that Internal & Supplier Capacity Verification was considered during quoting stage.

Capacity Verification - Applicable for Carry Over & Volume Uplifts

Program Details - Please ensure that all the fields are filled in.

<b>Project / Platform #</b> X152 <b>RPO #</b> RPO00005-01 <b>Customer Name</b> PCA <b>Customer Part #</b> PCA55 <b>Method Part #</b> 000000552(Switch Window letter) 000000553(Switch Color white) 000000554(Switch color black) <b>Estimated Annual Volume</b> <b>PSW Date</b>	<b>Project Release Date</b> 10 December 2015 <b>Production</b> <input type="checkbox"/> (tick X as applicable) <b>Prototype</b> <input type="checkbox"/> (tick X as applicable) <b>Part Description</b> Switches for door and window letter <b>Vehicle Model Year</b> <b>Product Lifetime</b> 5 <b>Start Of Production</b> 01 November 2017
---	---

Quoted Costs - Please ensure that the cost approved by the customer is filled in correctly.

<b>Production Unit Cost</b> 0.0 <b>Production Tooling</b> 0.0 <b>D&amp;D</b> <b>Payment Terms</b> <b>Notes/Comments</b>	<b>Prototype Unit Cost</b> 0.0 <b>Prototype Tooling</b> 0.0 <b>Lifetime Conditions</b> <b>Delivery Terms</b>
---	---

This is your authorization to release project for D&D / Prototype

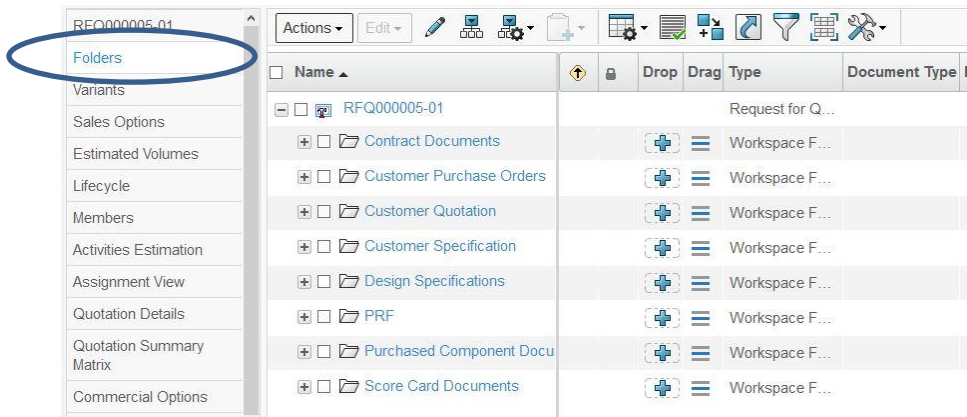
Released By: Sales / Account Manager	Signature:	Date:
Approved By: Financial Controller / Program Quoting Manager ooo Financial Controller	Signature:	Date:

This is your authorization to release project for Production

Version	11	Date:	28-Nov-2017
Status	Released		150

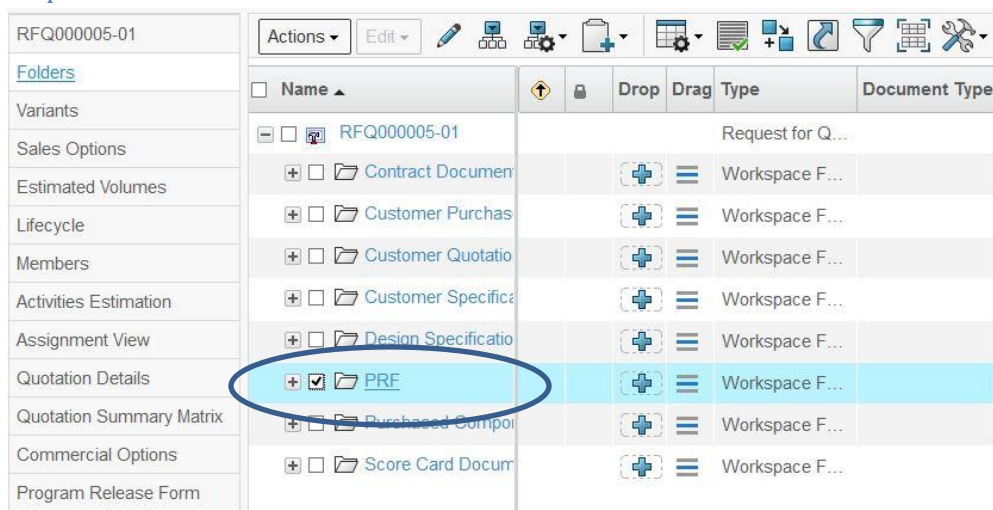
## Upload PRF document

### Step 1 Select Folders command from RFQ interface

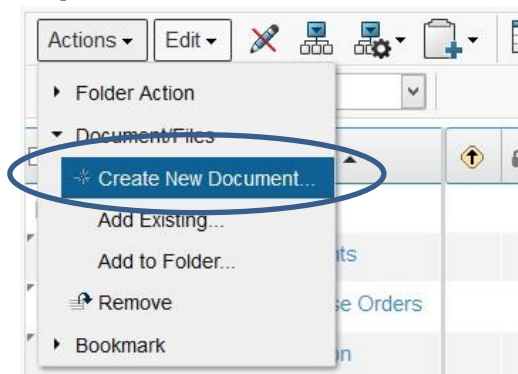


### Add Document using Create New Document functionality

#### Step 2 Select the Folder the document has to be added to




#### Step 3 Click Create New Document command from Actions menu




Version	11	Date:	28-Nov-2017
Status	Released		151

The Specify Details page will be shown

Step 1 of 2: Specify Details

 Fields in red italics are required.

*Name*  ☒ AutoName

*Type*  

*Policy*

Title

Description


*Access Type*

Document Approver Role


Document Type

Step 4 Click the Search Type icon

Step 1 of 2: Specify Details

 Fields in red italics are required.

*Name*  ☒ AutoName

*Type*  

*Policy*

Title

Description

*Access Type*

Document Approver Role

Document Type

Version	11	Date:	28-Nov-2017
Status	Released		152

The Select Type page will be shown

Select Type

begins with  ☒ Top Level Only  

Types

- ☒ DOCUMENTS

Step 5 Fill in \*PRF text into the white cell , remove the flag Top Level Only and click Filter bto select the PRF Document type

Select Type

begins with ☒ \*PRF ☐ Top Level Only  

Types

- ☒ DOCUMENTS

The PRF Document type will be shown

Select Type

begins with  \*PRF ☐ Top Level Only  

Types

- ☒ PRF Document

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## Step 6 Select the PRF Document type and click Select

The 'Select Type' dialog box shows a search filter 'begins with \*PRF' and a checkbox for 'Top Level Only'. Under the 'Types' section, 'PRF Document' is selected. The 'Select' button is highlighted at the bottom right.

The specific document type will be filled in into the Specify Details page

The 'Step 1 of 2: Specify Details' form shows fields for Name, Type, Policy, Title, Description, Access Type, Document Approver Role, and Document Type. The 'Type' field is set to 'PRF Document'. The 'Next' button is highlighted at the bottom right.

## Step 6 Fill in the Title, Description and click Next

The 'Step 1 of 2: Specify Details' form shows the 'Title' and 'Description' fields filled with 'PRF Document'. The 'Next' button is highlighted at the bottom right.

Version	11	Date:	28-Nov-2017
Status	Released		154

The Upload Files page will be shown

Step 2 of 2: Upload Files

File   Format	Comments
<div>Browse... No file selected.</div> <div>generic</div>	
<div>Browse... No file selected.</div> <div>generic</div>	
<div>Browse... No file selected.</div> <div>generic</div>	
<div>Browse... No file selected.</div> <div>generic</div>	

Previous

Done

Cancel

Step 7 Click Browse command and select the file to be uploaded from the file system

File | Format

Browse...

No file selected.

generic

The file name will be shown into the page

File | Format

Browse...

report\_2016-03-24T12\_07\_52.pdf

generic

Step 8 Click Done to finalized the Document generation

Step 2 of 2: Upload Files

File   Format	Comments
<div><div>Browse...</div><div>report_2016-03-24T12_07_52.pdf</div><div>generic</div></div>	
<div><div>Browse...</div><div>No file selected.</div><div>generic</div></div>	
<div><div>Browse...</div><div>No file selected.</div><div>generic</div></div>	
<div><div>Browse...</div><div>No file selected.</div><div>generic</div></div>	

Previous

Done

Cancel

Version	11	Date:	28-Nov-2017
Status	Released		155

The Document will be generated and added under the selected Folder

<div> <div>Actions</div> <div>Edit</div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>									
<input type="checkbox"/> Name ▲			Drop	Drag	Type	Document Type	Document Approver Role	Title	Actions
RFQ000005-01					Request for Q...				
Contract Document					Workspace F...				
Customer Purchas					Workspace F...				
Customer Quotatio					Workspace F...				
Customer Specifica					Workspace F...				
Design Specificatio					Workspace F...				
<b>PRF</b>					Workspace F...				
PRF-0000006		0/1			PRF Document			PRF-0000006	
Purchased Compon					Workspace F...				
Score Card Docum					Workspace F...				

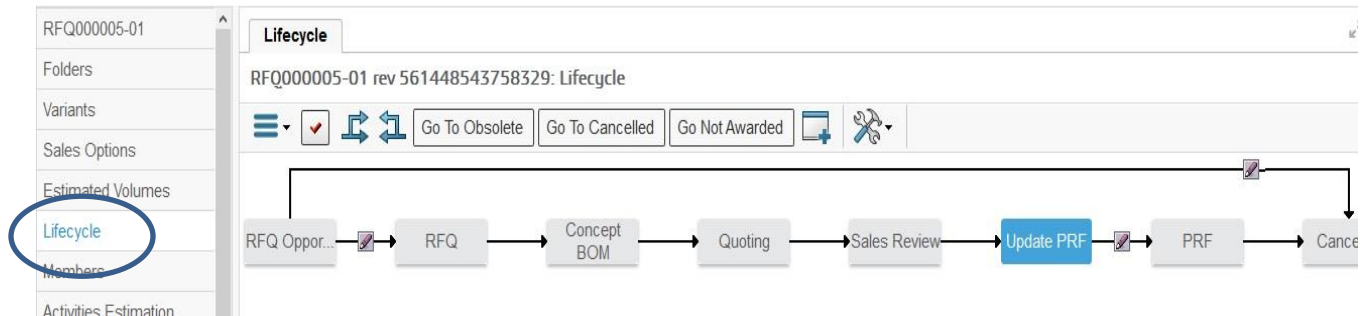
Version	11	Date:	28-Nov-2017
Status	Released		156

## RFQ36 RFQ Complete

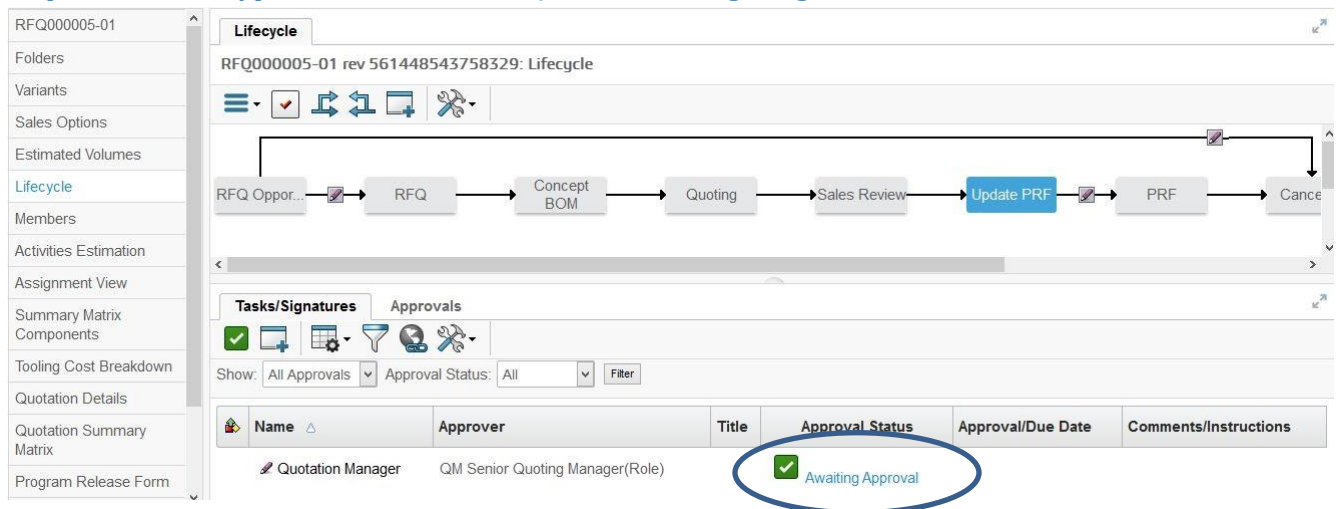
<b>Purpose</b>	Sales and Quotation Manager release RFQ package	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager, Quotation Manager and Launch Managers		
<b>Beginning</b>	RFQ status is Update PRF and PRF report has been provided		
<b>Interactions</b>	Quotation Manager has to approve RFQ package		
<b>End</b>	RFQ package is promoted to status PRF and Launch Managers are notified		
<b>Constraints</b>			

RFQ package in Update PRF state is complete, so Quotation Manager has to approve RFQ before send PRF to Launch Management

### Step 1 Select Lifecycle command from RFQ interface



### Step 2 Click the hyperlink related to the Quotation manager signature



Version	11	Date:	28-Nov-2017
Status	Released		157

The Approval page will be shown

Approval

Fields in red italics are required.

Approval

Comments

Action

☐ Approve  
☐ Reject  
☐ Ignore

Done Cancel

Step 3 Fill in a Comment (eg. the reason for the approval) and select the Approve Action

Approval

Fields in red italics are required.

Approval

Comments

approved

Action

☒ Approve  
☐ Reject  
☐ Ignore

Done Cancel

Step 4 Click Done to finalized the change

Approval

Fields in red italics are required.

Approval

Comments

approved

Action

☒ Approve  
☐ Reject  
☐ Ignore

Done Cancel

Version	11	Date:	28-Nov-2017
Status	Released		158

The RFQ lifecycle will be moved in PRF state



A notification will be sent to users contained in Member List “PRF Approved”.

Version	11	Date:	28-Nov-2017
Status	Released		159

## RFQ37 RFQ Revision

<b>Purpose</b>	Sales Manager request for a new quotation	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ status is Sales Review and Customer doesn't accept a quotation and ask for a new quotation		
<b>Interactions</b>	Sales Manager creates a new revision for an existing RFQ		
<b>End</b>	New RFQ revision is created cloning definition from previous quotation (variants, members, folders and documents, options, estimated volumes, quotation tasks)		
<b>Constraints</b>			

During Sales Review state, Sales Manager negotiates with customer in order to achieve an agreement; in this phase, customer can provide different specifications that would lead to quotation Revisioning.

The Sales Manager has the responsibility to create a new revision and update customer requirements.

Quotation Manager will then be notified about the new revision and will initiate a new quotation cycle.

### Step 1 Open the RFQ dashboard from "Home RFQ User" command

### Step 2 Select the RFQ to be revised (multiple selection is available)

Version	11	Date:	28-Nov-2017
Status	Released		160

### Step 3 Click the Revise RFQ command

The screenshot shows the 'RFQs' (Request for Quotations) interface. At the top, there's a tab labeled 'RFQs' and a sub-tab 'Request for Quotations' with a 'Filter:Active' indicator. Below this is a toolbar with various icons. The 'Revise RFQ' button, which has a circular arrow icon, is circled in blue. Below the toolbar is a table with the following columns: Name, Description, Status, Issue Date, Owner, Due Date, Customer Name, and Customer. The table contains three rows of data. The second row, 'RFQ000013-01' with the description 'window lifter for JLR X152', is highlighted in light blue and has its checkbox selected. The other two rows are 'RFQ000015-01' (test new quotation) and 'RFQ000012-01' (testing).

<input type="checkbox"/>	Name	Description	Status	Issue Date	Owner	Due Date	Customer Name	Cust
<input type="checkbox"/>	RFQ000015-01	test new quotation	RFQ	Jan 8, 2016	Test E...	Jan 29...		
<input checked="" type="checkbox"/>	RFQ000013-01	window lifter for JLR X152	Sales ...	Dec 3, 2...	Tony ...	Dec 3...	Jaguar Land ...	
<input type="checkbox"/>	RFQ000012-01	testing	RFQ	Dec 3, 2...	Test E...	Dec 1...		

The new revisions of selected RFQs will be created in RFQ state. All the information inside the newly revised RFQ is cloned from the previous version. The Sales Manager can modify/update the customer requirements to updated RFQ package.

When a new revision is created, users contained in Member List “RFQ Revised” receive a notification.

Version	11	Date:	28-Nov-2017
Status	Released		161



## RFQ38 RFQ Cancelled

<b>Purpose</b>	Sales Manager cancels a RFQ because Methode doesn't accept the customer request/proposal	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ is in state Sales Review and Sales Manager has sent to the customer a proposal		
<b>Interactions</b>	Sales Manager cancels a RFQ		
<b>End</b>	RFQ status is Cancelled		
<b>Constraints</b>			

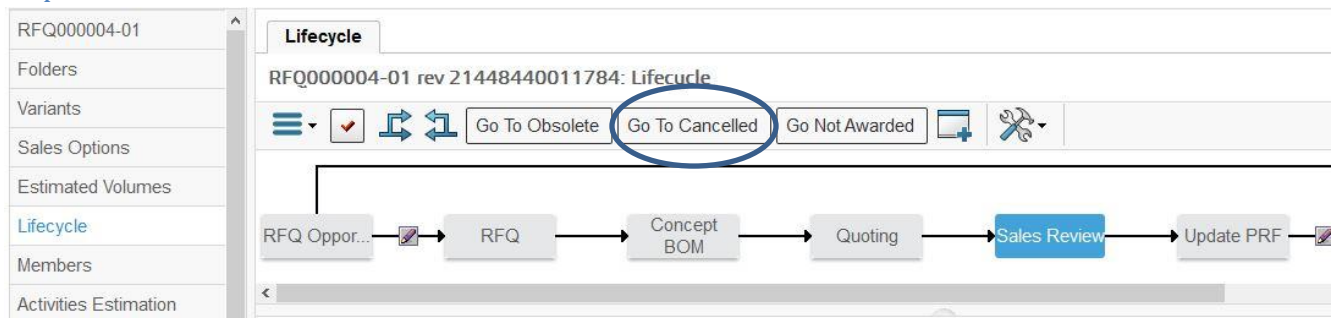
Sales Manager can decide to promote RFQ in Cancelled state if Methode decides if the quotation is not feasible.

This functionality is always available to the Sales Manager, not only when the RFQ is in state Sales Review.

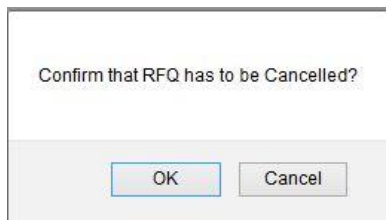
### Step 1 Select Lifecycle command from RFQ interface



### Step 2 Click the Go To Cancelled command



The following message will be shown



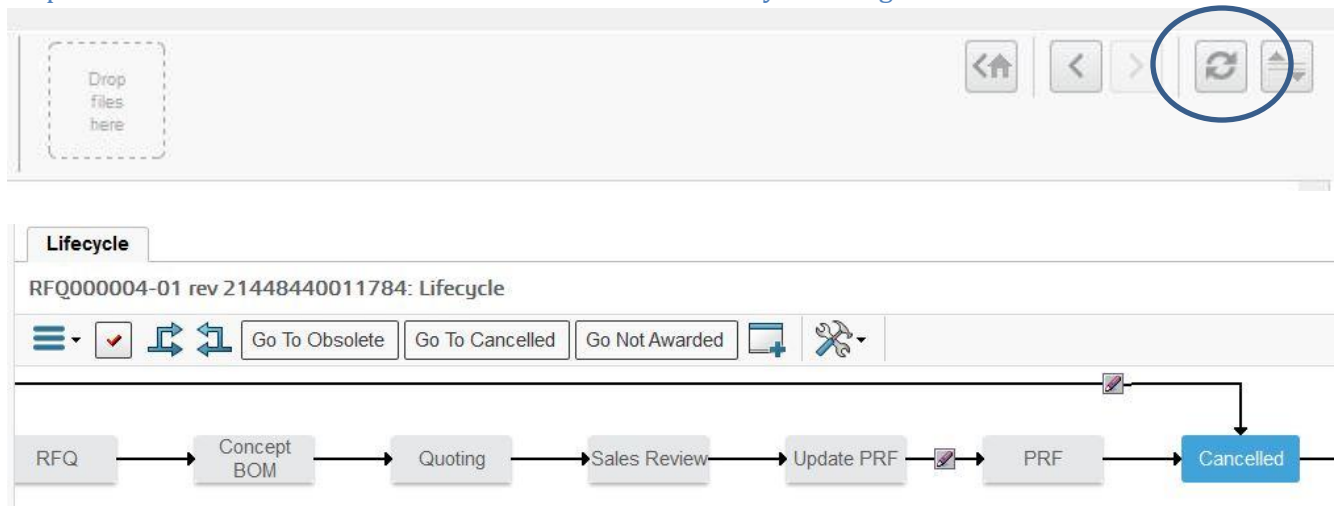
Version	11	Date:	28-Nov-2017
Status	Released		162

### Step 3 Click Ok to finalized the change



The RFQ lifecycle will be moved in Cancelled State

### Step 4 Click the Refresh command in order to show the lifecycle change



Version	11	Date:	28-Nov-2017
Status	Released		163

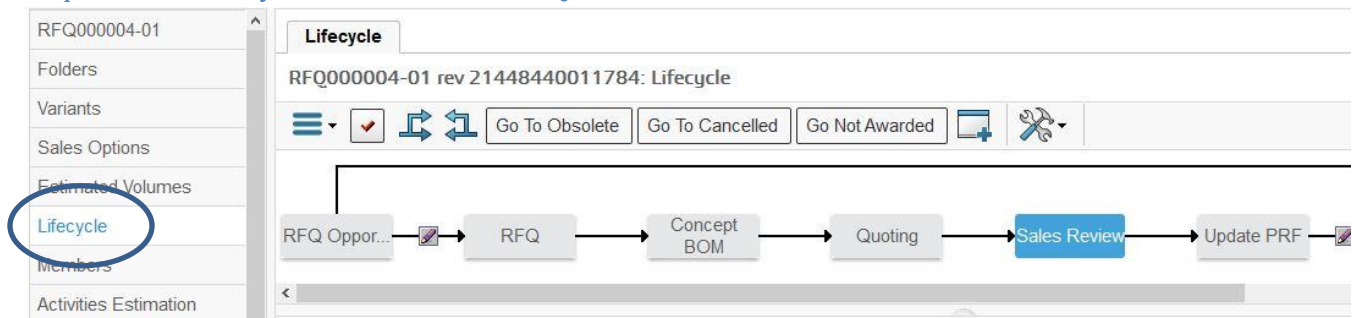
## RFQ39 RFQ Not Awarded

<b>Purpose</b>	Sales Manager cancels a RFQ because the Customer doesn't accept the proposal	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ status is Sales Review and Sales Manager has sent a proposal to the customer		
<b>Interactions</b>	Sales Manager cancels a RFQ		
<b>End</b>	RFQ status is Not Awarded		
<b>Constraints</b>			

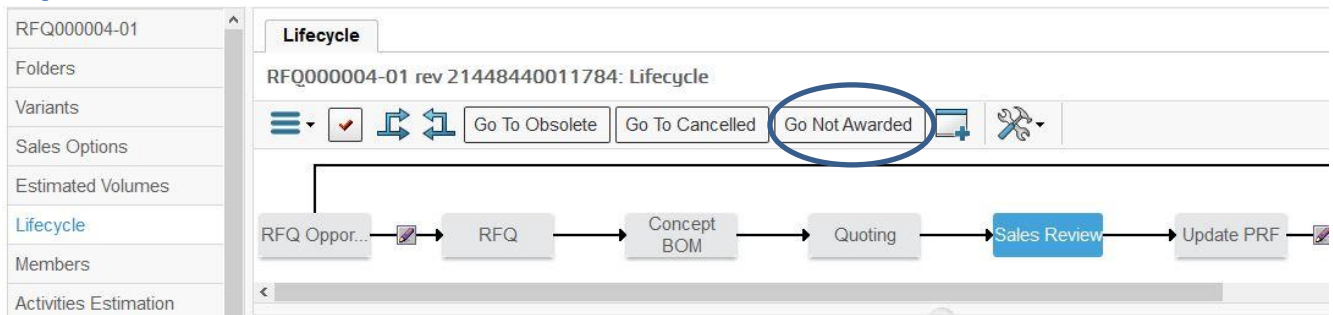
Sales Manager can decide to promote RFQ in Not Awarded state if Customer rejects the commercial proposal.

The function is always available to Sales Manager, not only when the RFQ is in state Sales Review.

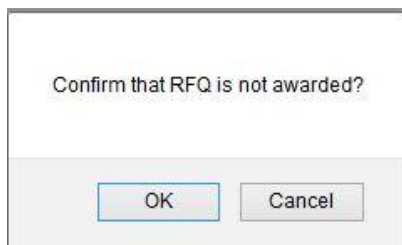
### Step 1 Select Lifecycle command from RFQ interface



### Step 2 Click the Go Not Awarded command



The following message will be shown



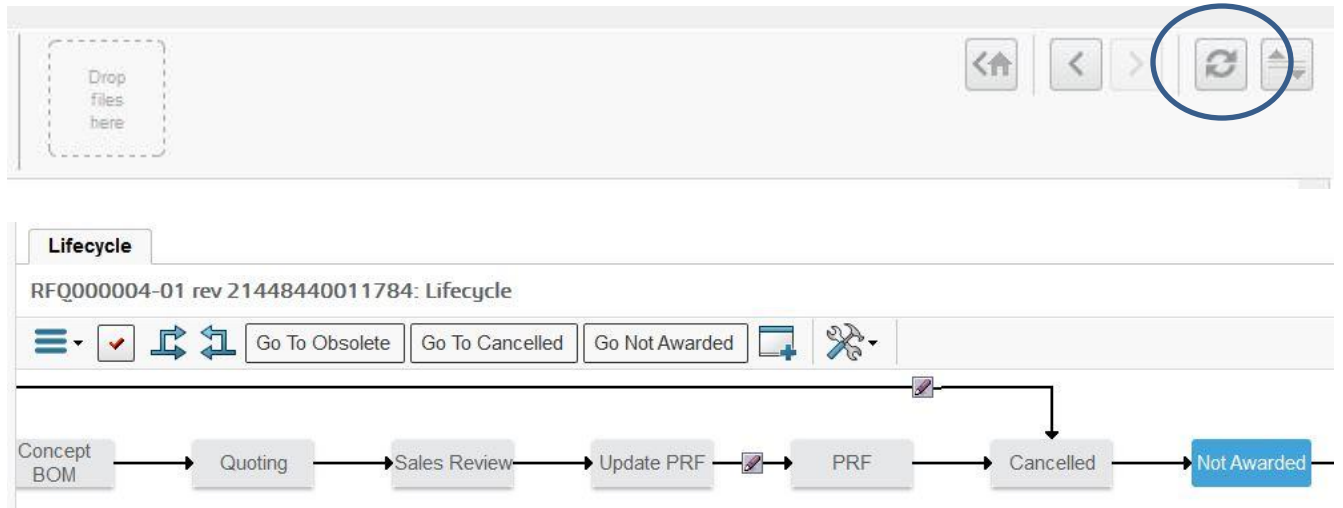
Version	11	Date:	28-Nov-2017
Status	Released		164

Step 3 Click Ok to finalized the change



The RFQ lifecycle will be moved in Not Awarded State

Step 4 Click the Refresh command in order to show the lifecycle change



Version	11	Date:	28-Nov-2017
Status	Released		165

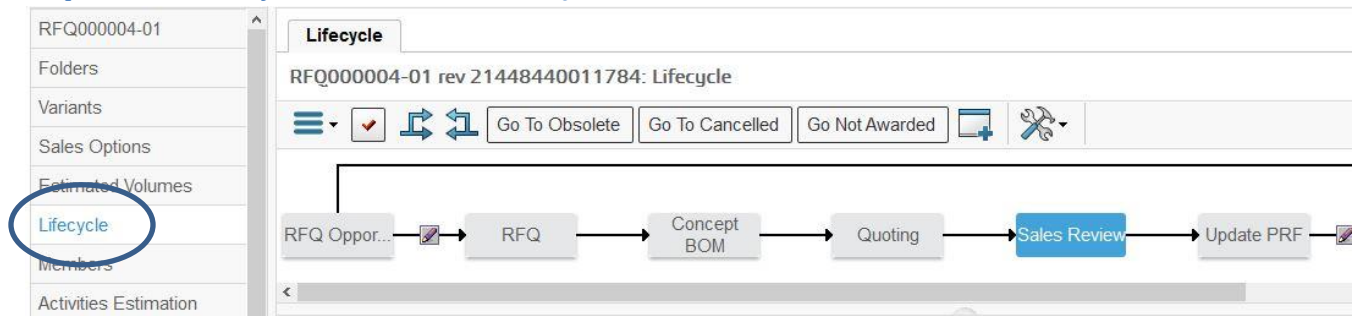
## RFQ40 RFQ Obsoleted

<b>Purpose</b>	Sales Manager moves a RFQ to status Obsolete because RFQ is expired or a new revision is created	<b>Status</b>	Define
<b>Stakeholders</b>	Sales Manager		
<b>Beginning</b>	RFQ status is Sales Review and RFQ Expire Date is over.		
<b>Interactions</b>	Sales Manager obsoletes a RFQ		
<b>End</b>	RFQ status is Obsolete		
<b>Constraints</b>			

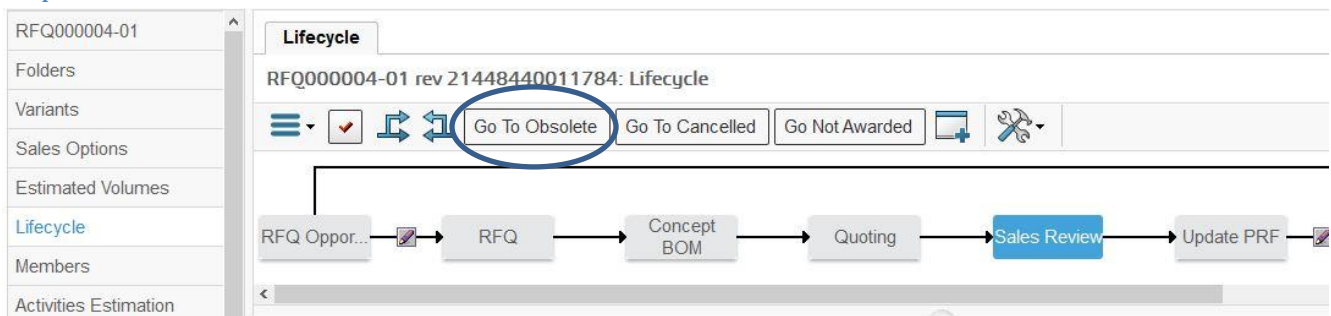
Sales Manager can decide to promote RFQ in Obsolete state if a new revision is created and previous is out-of-date or RFQ Expire Date is over.

The function is always available to Sales Manager, not only in state Sales Review.

### Step 1 Select Lifecycle command from RFQ interface



### Step 2 Click the Go To Obsolete command



The following message will be shown



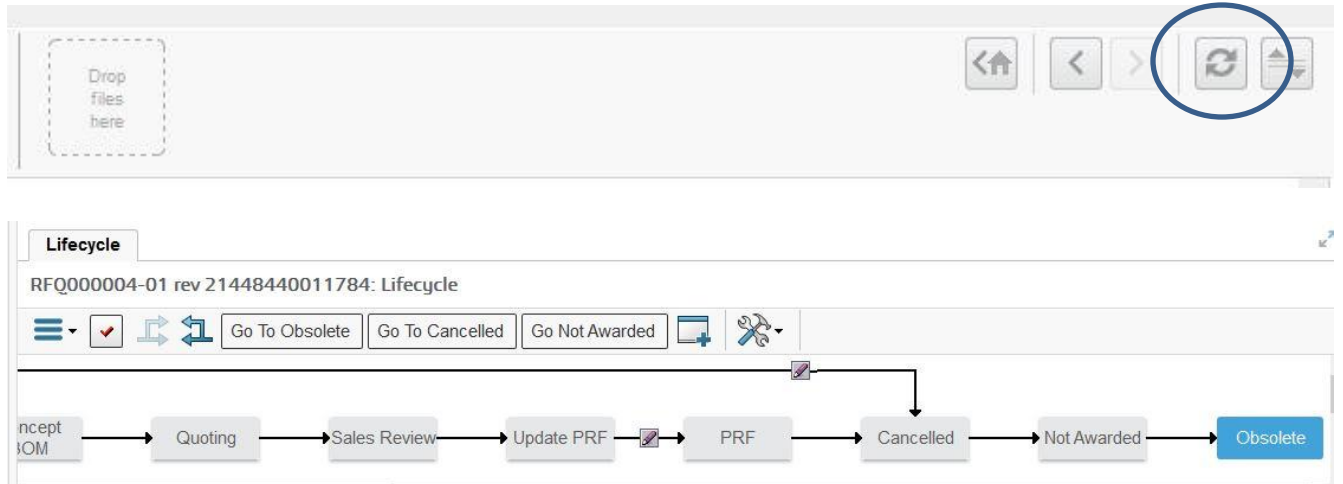
Version	11	Date:	28-Nov-2017
Status	Released		166

### Step 3 Click Ok to finalized the change



The RFQ lifecycle will be moved in Obsolete state

### Step 4 Click the Refresh command in order to show the lifecycle change



Version	11	Date:	28-Nov-2017
Status	Released		167

## TECHNIQUE 01

## RFQ run for new business

<b>Title</b>	Complete RFQ run for a new business	<b>Status</b>	Define
<b>Description</b>	Customer asks for a new RFQ related to a new business / opportunity. RFQ contains new variants, not related to an existing product or program		

Tasks sequence:

- RFQ creation
- Customer specification and documents upload
- New variants definition (add, clone, remove)
- Sales Options creation (add, clone, remove)
- Sales options to Variants definition
- Estimated volumes definition
- Score Card documents upload
- Quoting Manager selection
- Go/No Go decision
- Members definition
- Folders definition
- Assigning members to task for estimation
- CBOMs creation and management
- Activities estimation
- Estimated Timing Plan definition
- Tooling Definition
- TFC and Modularity checklist
- Tooling Definition by Quoting Manager
- Quotation definition
- Commercial Option definition
- RFQ accepted decision
- Update PRF and PRF creation
- RFQ complete

Version	11	Date:	28-Nov-2017
Status	Released		168

## TECHNIQUE 02

## RFQ run for an existing product

<b>Title</b>	Complete RFQ run for an existing product	<b>Status</b>	Define
<b>Description</b>	Customer asks for a new RFQ related to an existing business. RFQ contains variants related to an existing product		

Tasks sequence (highlight differences from previous technique):

- RFQ creation
- Customer specification and documents upload
- Update variants definition
- Sales Options creation (add, clone, remove)
- Sales options to Variants definition
- Estimated volumes definition
- Score Card documents upload
- Quoting Manager selection
- Go/noGo decision
- Members definition
- Folders definition
- Assigning members to task for estimation
- CBOMs creation and management (update CBOMs)
- Activities estimation
- Estimated Timing Plan definition
- Tooling Definition
- TFC and Modularity checklist
- Tooling Definition by Quoting Manager
- Quotation definition
- Commercial Option definition
- RFQ accepted decision
- Update PRF and PRF creation
- RFQ complete

Version	11	Date:	28-Nov-2017
Status	Released		169



## TECHNIQUE 03

## RFQ run with customer rejection and re-quote request

Title	RFQ revised for re-quoting request by Customer	Status	Define
Description	RFQ has CBOMs and estimation completed. Customer doesn't accept quotation and ask for a re-quote Sales Manager asks for a change in CBOMs and requests to execute a new estimation		

Tasks sequence:

- RFQ revision during state Sales Review

RFQ revision is created with status RFQ

- Update folders and documents definition
- Update variants definition
- Update sales options definition
- Update Estimated volumes definition
- Update members definition
- Assigning members to task for estimation
- CBOMs creation and management (update CBOMs)
- ...

Version	11	Date:	28-Nov-2017
Status	Released		170

## MBOM11 Create and update Finished Products

<b>Purpose</b>	Engineer users create BOM for Product and for Packaging; Finished Product has to be created by MBOM Engineer	<b>Status</b>	Define
<b>Stakeholders</b>	MBOM Engineer		
<b>Beginning</b>	EBOM for Product is complete; EBOM for Packaging is complete		
<b>Interactions</b>	MBOM Engineer searches for part number to publish, creates a part number classified as Finished Product, creates and approves the EBOM.		
<b>End</b>	EBOM for a Finished Product is created		
<b>Constraints</b>	None		

### Create new Finished Product

When a Customer requests for a new product, a RFQ process is started; If RFQ is approved and the PRF is approved, Engineer can create the EBOM for a new product.

When Engineer completes and approves the EBOM, MBOM Engineer has to create the Finished Product part number and create the EBOM with Product part number.

#### Product definition

##### Step 1 Search for new Product part number

MBOM Engineer can recognize when a new Product part number is approved using the “Parts to Publish” table. Engineer can also notify MBOM Engineer users with current process (using application outside PLM).

User can search for part number classified as “Product”

▼ Collaboration and Approvals

Home

Home RFQ User

Home Engineering User

Home Change Management User

Home Manufacturing User

Issues Summary

Shortcuts...








Collections

Parts to Publish

Parts to Complete

MCOs

Manufacturing Par...

<input type="checkbox"/> Name ▲	Classification	Rev	Description
<input type="checkbox"/>  00001164	PCB	00	housing
<input type="checkbox"/>  00002654	Packaging	00	Packaging Switch 3
<input type="checkbox"/>  00003662	Product	00	BRAKE DUAL CCT 3.5 MM
<input type="checkbox"/>  1.52779GRY	Finished Product	00	SUB ASS BEZEL
<input type="checkbox"/>  1.551106		00	JLR START STOP SWITCH
<input type="checkbox"/>  1.553094	Finished Product	00	JLR SPOILER
<input type="checkbox"/>  1.750202	Finished Product	00	MITSUBISHI STEERING-L6

Version	11	Date:	28-Nov-2017
Status	Released		171

User can also refine the table selecting only parts classified as “Packaging”

**Parts to Publish - Refinements**

- Name
  - ☐ 00003662 (1)
- Classification
  - ☐ [Blank] (146)
  - ☐ Finished Product (26)
  - ☐ PCB (1)
  - ☐ Packaging (1)
  - ☒ Product (1)
- Rev
  - ☐ 00 (1)

**Parts to Publish**

Name	Classification	Rev	Description
<input type="checkbox"/> 00003662	Product	00	BRAKE DUAL CCT

Step 2 Add to Clipboard the Product part number

**00003662** State: Review Approved Publish

Owner : Samantha  
Modified : May 20, 2016 6:29:38 PM

**00003662 00**

Bill Of Materials  
Change Management  
Specs & Documents  
Related Parts

**Properties**

Name	Material Parts	Revision	CMS Information
00003662	<input checked="" type="checkbox"/>	00	
Originator	Samantha Grima	Originated	May 20, 2011

Finished Product creation

Step 1 Create new Finished Product

User has to select “Create Parts” command in “Home Engineering User”

**Collaboration and Approvals**

- Home
- Home REQ User
- Home Engineering User**
- Home Change Management User
- Home Manufacturing

**My Parts**

Create Parts

Name	Type
<input type="checkbox"/> 00003652	EC Part
<input type="checkbox"/> 1.453050	EC Part

Version	11	Date:	28-Nov-2017
Status	Released		172

Step 2 Select policy “EC Part” and select Done

**Create Part**

Fields in red Italics are required

**Type** Part ... **Policy** EC Part ▼

**AutoName Series** Part Number ▼ **Number of Parts** 1

Done Cancel

Step 3 Select new parts from “My Parts” tab

▼ Collaboration and Approvals	My Parts	Parts to Approve	Sketch to EC Part...	My CA
Home	Create Parts			
Home RFQ User				
Home Engineering User				
Home Change Management User				
	Name ▲	Type	Rev	Descr
	<input type="checkbox"/> 00003652	EC Part	00	
	<input type="checkbox"/> 00003672	EC Part	00	
	<input type="checkbox"/> 1.453050	EC Part	01	BRAK

Step 4 Complete the information

Select Edit icon and complete the information; select Done when completed

00003672 00

Bill Of Materials

Change Management

Specs & Documents

Related Parts

Properties

Name 00003672

Originator Samantha Grima

Part Classification -

Description

Version	11	Date:	28-Nov-2017
Status	Released		173

The user has to update the field “End Item” to “Yes” (it’s necessary before publishing the part)

**Properties** | Material Parts | CMS Information | Lifecycle | Where Used | Revisions | Versions | »

Fields in red italics are required

Name	00003672	Revision	00	State
Originator	Samantha Grima	Originated	May 20, 2016	Modified
Part Classification	-	Quality Release		
Description	BRAKE DUAL CCT 3.5 MM			
Design Purchase	Design	Long Lead Time Component	FALSE	
End Item	Yes	CMS Part Status		

**Technical**

Net Weight	0.0	Gross Weight	0.0	Net Weight UOM
Carry Over		Remarks		

**Done** | Cancel

### Step 5 Classify the part as “Finished Product”

About classification, see “CBOM and EBOM Use Cases” document.

**Properties** | Material Parts | CMS Information | Lifecycle | Where Used | Revisions

Name	00003672	Revision	00	State
Originator	Samantha Grima	Originated	May 20, 2016	Modified
Part Classification	-	Quality Release		
Description	BRAKE DUAL CCT 3.5 MM			
Design Purchase	Design	Long Lead Time Component	FALSE	
End Item	Yes	CMS Part Status		

**Technical**

Net Weight	0.0	Gross Weight	0.0	Net Weight UOM
Carry Over Parts		Remarks		
Similar Parts				

**Classification Path** | **Technical Classification → Finished Product**

**Finished Product**

Version	11	Date:	28-Nov-2017
Status	Released		174

## Step 6 Complete EBOM with Product part number

About Bill of Material management, see “CBOM and EBOM Use Cases” document.

Drop images here

00003672  
Part (00)

BRAKE DUAL CCT 3.5 MM

State : Preliminary → Review  
Owner : Samantha  
Modified : May 20, 2016 6:42:44 PM

Drop files here

00003672.00

Bill Of Materials

Change management

Specs & Documents

Related Parts

Collaboration

Manufacturing Details

Vendor Part Numbers

EBOM

EBOM Common

MBOM Plant Specif...

Where Used

Markups

Reports

Mass Update

Save

<input checked="" type="checkbox"/>	Name	Type	State	Rev	F/N	Qty	U of M	Description	De
<input checked="" type="checkbox"/>	00003672	EC Part	Prel...	00			PCS ...	BRAKE DUAL CCT 3.5 MM	De
<input type="checkbox"/>	00003662	EC Part	Appr...	00	1	150.0	CS ...	BRAKE DUAL CCT 3.5 MM	De

Version	11	Date:	28-Nov-2017
Status	Released		175

## Create new Finished Product by copy

Customers can request for a product, already in production phase, with a different packaging size. In this case, the MBOM Engineer has to create a new Finished Product part number composed by the same Product part number and a new Packaging part number.

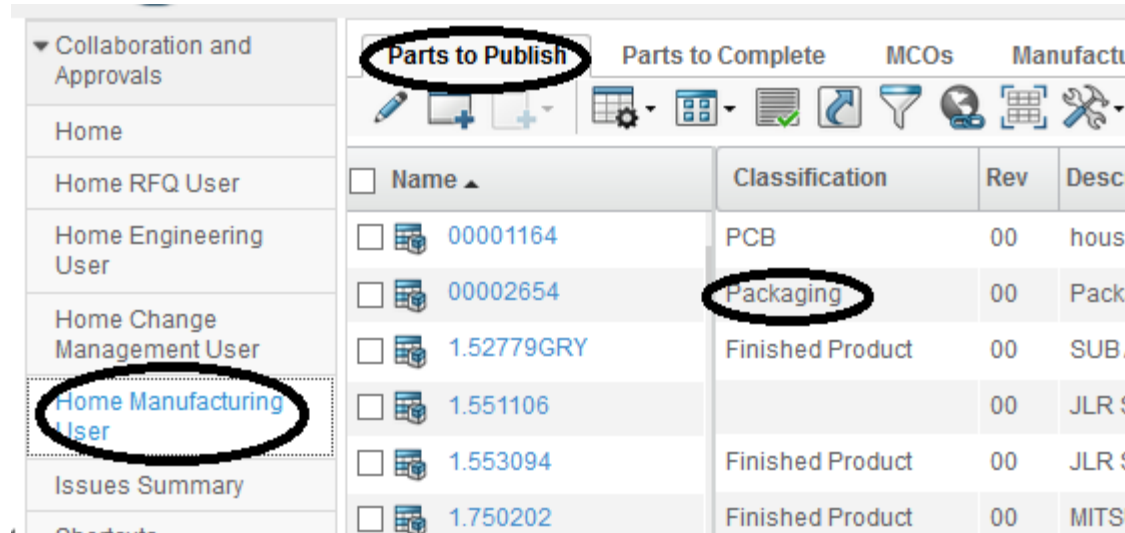
In order to create a new Finished Product, the MBOM Engineer can clone an existing Finished Product and update the EBOM replacing the previous Packaging part number with a new one. When new Finished Product EBOM is completed, the new part revision can be approved and published.

### Packaging definition

#### Step 1 Search for new Packaging part number

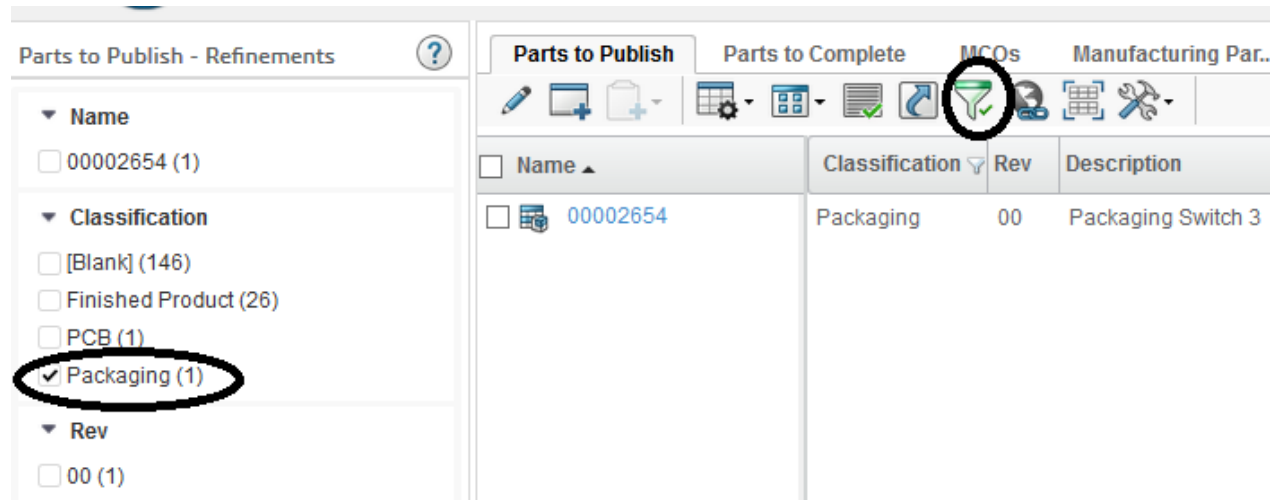
The new Packaging part number has to be created and approved by Packaging Engineer; MBOM Engineer can recognize when a new Packaging part number is approved using the “Parts to Publish” table. Packaging Engineer can also notify MBOM Engineer users with current process (using application outside PLM).

User can search for part number classified as “Packaging”



Collaboration and Approvals				
Home				
Home RFQ User				
Home Engineering User				
Home Change Management User				
Home Manufacturing User				
Issues Summary				
Chadwick				
Parts to Publish				
Parts to Complete				
MCOs				
Manufacturing				
<input type="checkbox"/> Name	Classification	Rev	Desc	
<input type="checkbox"/> 00001164	PCB	00	hous	
<input type="checkbox"/> 00002654	Packaging	00	Pack	
<input type="checkbox"/> 1.52779GRY	Finished Product	00	SUB	
<input type="checkbox"/> 1.551106		00	JLR	
<input type="checkbox"/> 1.553094	Finished Product	00	JLR	
<input type="checkbox"/> 1.750202	Finished Product	00	MITS	

User can also refine the table selecting only parts classified as “Packaging”



Parts to Publish - Refinements			
Parts to Publish			
Parts to Complete			
MCOs			
Manufacturing Par..			
Name			
Classification			
Rev			
Description			
00002654 (1)			
[Blank] (146)			
Finished Product (26)			
PCB (1)			
Packaging (1)			
00 (1)			
00002654			
Packaging			
00			
Packaging Switch 3			

Version	11	Date:	28-Nov-2017
Status	Released		176

## Step 2 Add to Clipboard the Packaging part number

Drop Images here

**00002654**  
Part (00)

Packaging Switch 3

State : Review Approved Publish  
Owner : MarioP  
Modified : May 11, 2016 11:35:41 PM

**00002654 00**  
Bill Of Materials  
Change Management  
Specs & Documents  
Related Parts

Properties
Material Parts
CMS Information
Lifec

Name	00002654	Revision	00	State
Originator	Mario Pulicino	Originated	May 11, 2016	Modit

## Finished Product creation

### Step 1 Search for existing Finished Product

User has to search for existing Finished Product

Drop Images here

**1.453050**  
Part (00)

BRAKE DUAL CCT 2.5MM

State : Publish  
Owner : Corporate  
Modified : May 3, 2016 2:59:1

**1.453050 00**  
Bill Of Materials  
Change Management  
Specs & Documents  
Related Parts

Properties
Material Parts
CMS Infor

Name	1.453050
Originator	Joseph Zammit
Part Classification	-

Version	11	Date:	28-Nov-2017
Status	Released		177



## Step 2 Select "Create Part Clone" icon

User has to select the AutoName checkbox and select Done; the selection of checkbox EBOM will copy the EBOM to new part number

1.453050|Clone Part |

Fields In red Italics are required

Clone Based On 1.453050

Include Related Data ☐ All

- ☐ Alternates
- ☐ Attachments
- ☐ EBOM with Substitutes
- ☒ EBOM
- ☐ Equivalents
- ☒ Reference Documents
- ☐ Spare Parts
- ☐ Specification

Type Part

Part Name ☒ AutoName

AutoName Series Part Number

Policy EC Part

Custom Revision Level 00

Part Family Finished Product

Number of Parts 1

Done Cancel

## Step 3 Complete information and select Done

The system creates a new part number copying information and Bill of Material from previous part number.

Drop Images here Part (00) Owner : Samantha Modified : May 20, 2016 5:14:22 PM Drop files here

00003652 00

Bill of Materials

Change Management

Specs & Documents

Related Parts

Collaboration

Manufacturing Details

Vendor Part Numbers

CMS Information

Tool Parts

Referenced By

Classification PowerView

Issues

Related Change Notices

Properties Material Parts CMS Information Lifecycle Where Used Revisions Versions History Images

Fields In red Italics are required

Name 00003652 Revision 00 State Modified

Originator Samantha Grima Originated May 20, 2016 Modified

Part Classification - Quality Release

Description

Design Purchase Design

End Item Yes

Long Lead Time Component FALSE

CMS Part Status

Technical

Net Weight 0.036 Gross Weight 0.0 Net Weight UOM

Done Cancel

Version	11	Date:	28-Nov-2017
Status	Released		178

The new part maintains the same classification of previous part number.

00003652 00	<b>Properties</b>	Material Parts	CMS Information	Lifecycle	Where Used	Revision
Bill Of Materials						
Change Management	Name	00003652		Revision	00	
Specs & Documents	Originator	Samantha Grima		Originated	May 20, 2016	
Related Parts	Part Classification	-		Quality Release		
Collaboration	Description					
Manufacturing Details	Design Purchase	Design		Long Lead Time Component	FALSE	
Vendor Part Numbers	End Item	Yes		CMS Part Status		
CMS Information	<b>Technical</b>					
Tool Parts	Net Weight	0.036		Gross Weight	0.0	
Referenced By	Carry Over Parts			Remarks		
Classification PowerView	Similar Parts					
Issues	Classification Path	Technical Classification → Finished Product				
Related Change Notices	Finished Product					

#### Step 4 Update and approve the Bill of Material

Using the EBOM functionalities (see “CBOM and EBOM Use Cases” document), MBOM Engineer can update the EBOM in order to replace the Packaging part number and updating the quantities.

<b>EBOM</b>	EBOM Common	MBOM Plant Specif...	Where Used	Markups				
Mass Update <input type="text"/>								
<input type="button" value="Save"/> <input type="button" value="Reset"/>								
Name	Type	State	Rev	F/N	Qty	U of M	Description	Desi
00003652	EC Part	Prel...	00			PCS ...		Desi
453050	EC Part	Publish	00	1	250.0	PCS ...	BRAKE DUAL CCT 2.5MM	Desi
453050P	EC Part	Publish	00	2	1.0	PCS ...	BRAKE DUAL CCT 2.5MM	Desi
00002654	EC Part	Appr...	00	2	1.0	PCS ...	Packaging Switch 3	Desi

About Bill of Material management, see “CBOM and EBOM Use Cases” document.

Version	11	Date:	28-Nov-2017
Status	Released		179

## Revise a Finished Product

During Finished Product definition, usually the Packaging part number is defined during PDPLS Phase 4 when Product and Finished Product part numbers are already defined and published to CMS.

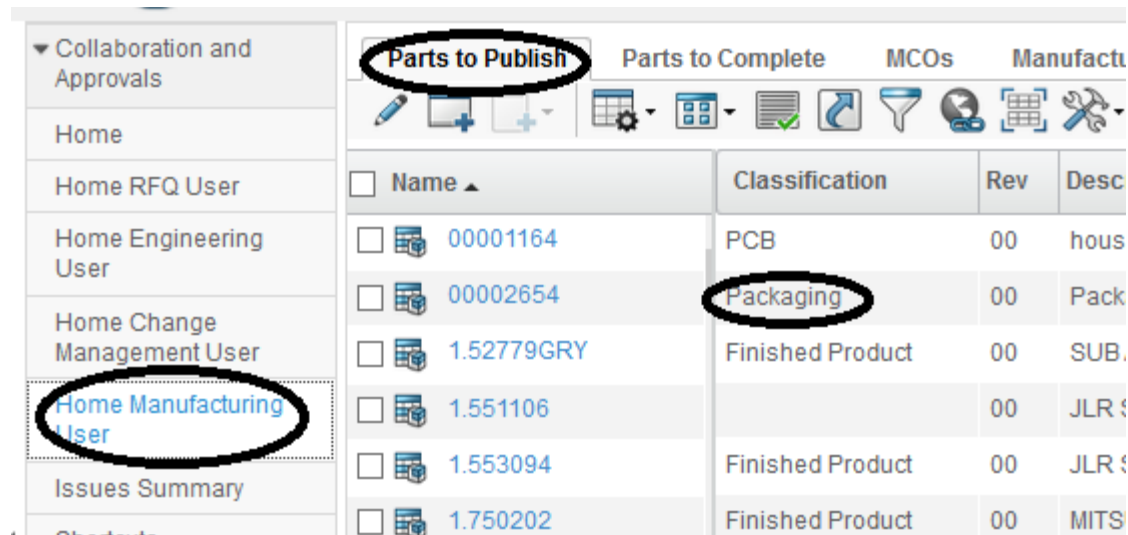
In order to update the Finished Product Bill of Material, the MBOM Engineer has to create a new Finished Product revision and update the EBOM adding the Packaging part number. When Finished Product EBOM is completed, the new part revision can be approved and published.

### Packaging definition

#### Step 1 Search for new Packaging part number

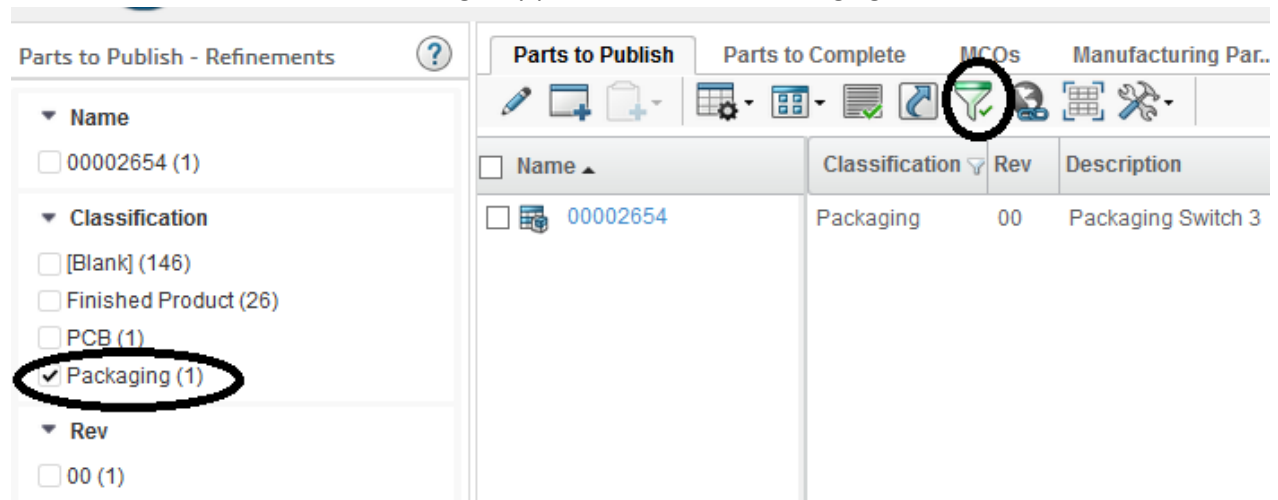
MBOM Engineer can recognize when a new Packaging part number is approved using the “Parts to Publish” table. Packaging Engineer can also notify MBOM Engineer users with current process (using application outside PLM).

User can search for part number classified as “Packaging”



Parts to Publish				
Name	Classification	Rev	Desc	
<input type="checkbox"/> 00001164	PCB	00	hous	
<input type="checkbox"/> 00002654	Packaging	00	Pack	
<input type="checkbox"/> 1.52779GRY	Finished Product	00	SUB.	
<input type="checkbox"/> 1.551106		00	JLR S	
<input type="checkbox"/> 1.553094	Finished Product	00	JLR S	
<input type="checkbox"/> 1.750202	Finished Product	00	MIT	

User can also refine the table selecting only parts classified as “Packaging”



Parts to Publish - Refinements	
Name	Classification
<input type="checkbox"/> 00002654 (1)	
▼ Classification	
<input type="checkbox"/> [Blank] (146)	
<input type="checkbox"/> Finished Product (26)	
<input type="checkbox"/> PCB (1)	
<input checked="" type="checkbox"/> Packaging (1)	
▼ Rev	
<input type="checkbox"/> 00 (1)	

Parts to Publish			
Name	Classification	Rev	Description
<input type="checkbox"/> 00002654	Packaging	00	Packaging Switch 3

Version	11	Date:	28-Nov-2017
Status	Released		180

## Step 2 Add to Clipboard the Packaging part number

Drop Images here

**00002654** Part (00)

Packaging Switch 3

State : Review Approved Publish

Owner : MarioP

Modified : May 11, 2016 11:35:41 PM

00002654 00

Bill Of Materials

Change Management

Specs & Documents

Related Parts

Properties

Material Parts

CMS Information

Lifecycle

Name 00002654 Revision 00 State

Originator Mario Pulicino Originated May 11, 2016 Modified

## Finished Product revision

### Step 1 Search for existing Finished Product

User has to search for existing Finished Product and select Revisions tab

Drop Images here

**1.453050** Part (00)

BRAKE DUAL CCT 2.5MM

State : Publish

Owner : Corporate

Modified : May 20, 2016 5:14:22 PM

1.453050 00

Bill Of Materials

Change Management

Specs & Documents

Related Parts

Collaboration

Properties

Material Parts

CMS Information

Lifecycle

Where Used

Revisions

Version

Name 1.453050 Rev 00 State Publish Type EC Part

### Step 2 Select "Create Revision" command

The command is available only for part classified as "Finished Product"; the user has to enter a revision comment (mandatory) and select Done (the new revision is retrieved by the system).

Revise

Type Part

Part Name 1.453050

Policy EC Part

Custom Revision Level 01

Basic

Revision Comments New revision for packaging definition

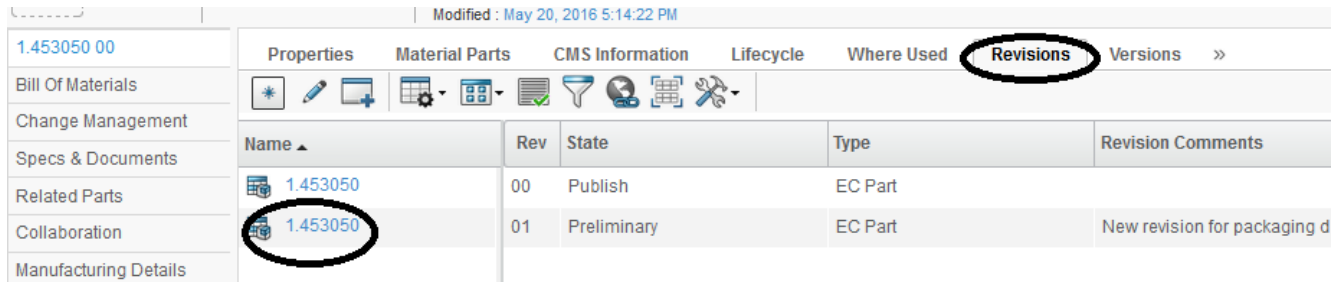
Description BRAKE DUAL CCT 2.5MM

Done Cancel

Version	11	Date:	28-Nov-2017
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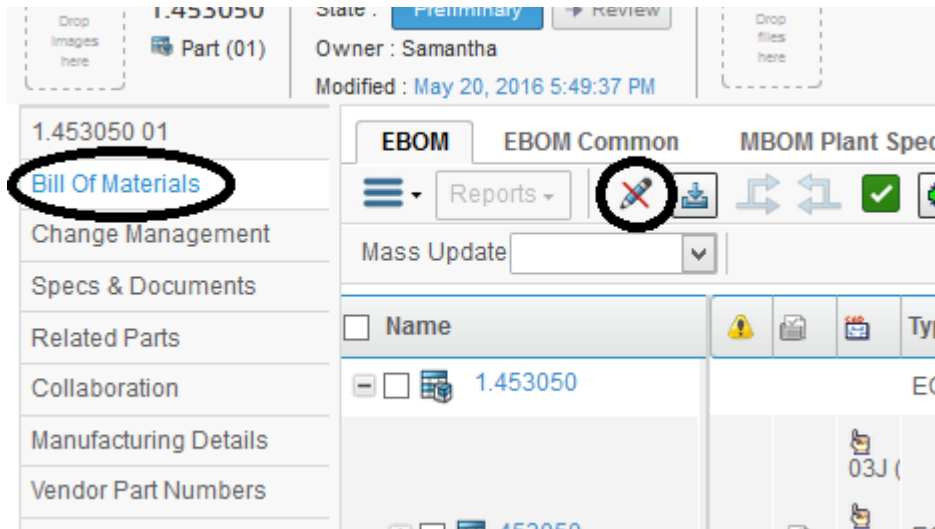
### Step 3 Update and approve Bill of Material

The Revision table is updated with new Finished Product revision; user has to select the new revision



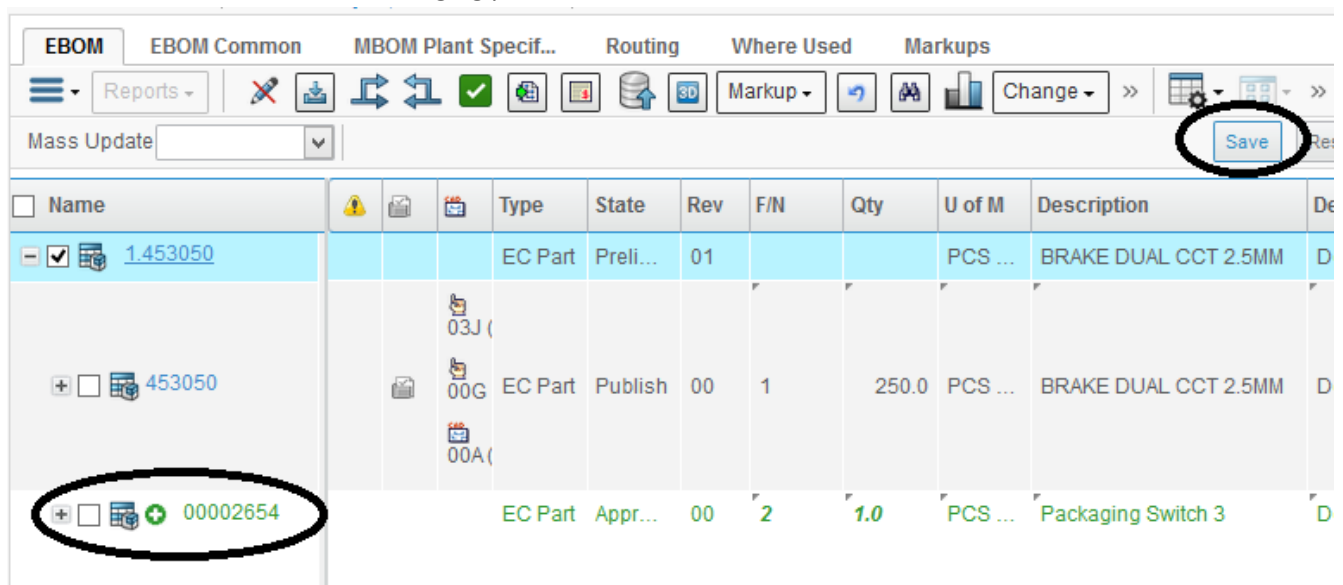
Name	Rev	State	Type	Revision Comments
1.453050	00	Publish	EC Part	
1.453050	01	Preliminary	EC Part	New revision for packaging d

Select “Bill of Materials” command, select EBOM tab and select Edit icon



Name	Type
1.453050	EC

Using the EBOM functionalities (see “CBOM and EBOM Use Cases” document), MBOM Engineer can update the EBOM in order to add the Packaging part number



Name	Type	State	Rev	F/N	Qty	U of M	Description	De
1.453050	EC Part	Prel...	01				BRAKE DUAL CCT 2.5MM	D
453050	EC Part	Publish	00	1	250.0	PCS ...	BRAKE DUAL CCT 2.5MM	D
00002654	EC Part	Appr...	00	2	1.0	PCS ...	Packaging Switch 3	D

Version	11	Date:	28-Nov-2017
Status	Released		182