Infor Fashion PLM Partner Collaboration User Guide

Release 15.1.9.2

Publication Information

Release: Infor Fashion PLM 15.1.9.2
Publication Date: June 14, 2019
Document code: ifplm_15.1.9.2_ifplmpcug__en-us

Contents

About this guide.....5

Related documents.....5

Contacting Infor.....6

Chapter 1: Getting started.....7

Partner Collaboration overview.....7

Application home page.....7

Specifying the language for the application.....8

Setting filters.....8

Customizing grid settings.....10

Chapter 2: Using the application.....12

Managing users.....12

Viewing style information.....13

Viewing material information.....14

Managing requests for samples.....15

Download reports.....16

View images.....16

Managing requests for quotations.....16

Download reports.....17

View images.....18

Managing requests for compliance tests.....18

Download reports.....19

View images.....19

Managing requests for lab dips.....19

Download reports.....20

View images.....21

Managing requests for samples with costs.....21

Download reports....22
View images....23
Managing requests for supplier compliance....23
Posting comments....24

About this guide

This guide describes how to use Infor Fashion PLM Partner Collaboration. This guide also explains related concepts and features, and their usage in the application.

Intended audience

This guide is intended for Infor consultants, PLM users, and partners who need to understand how the application works and its basic functions.

Related documents

You can find these documents in the Infor Xtreme Support portal:

- *Infor Fashion PLM Partner Collaboration Installation Guide*
- *Infor Fashion PLM Planning Application Host Installation Guide*
- *Infor Fashion PLM User Guide*
- *Planning Application Host Administration Guide*

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at https://concierge.infor.com/ and create a support incident.

If we update this document after the product release, we will post the new version on the Infor Support Portal. To access documentation, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Getting started

Learn the concepts and key features of the application.

Partner Collaboration overview

Infor Fashion PLM Partner Collaboration is a web application that enables partners in the product life cycle management process, such as suppliers, to access relevant information from Infor Fashion PLM. Partner Collaboration provides a two-way environment where transactions, feedback, and communication between product developers and partners are easy to manage. By accessing this application over the web, suppliers and other partners can do these actions:

- Manage requests for samples, quotations, compliance tests, and supplier compliance
- View style, material, and trim information
- Manage external users

Access to the web application is granted in two ways. The first is from Infor Fashion PLM. Managed under the Sourcing library, Partner Collaboration users are identified and given access to information on a particular style, material, or trim. The second is from the web application, managed by the Partner Collaboration administrator. After being identified as a partner, a user receives an email that contains the web URL for Partner Collaboration and a system-generated password. The user can then access and log on to Partner Collaboration, using the email address and system-generated password as login credentials. After logging in for the first time, the user is prompted to change the password.

See the *Infor Fashion PLM Partner Collaboration Installation Guide* and *Infor Fashion PLM Online Help*.

Application home page

The home page emphasizes the key functions of the application by presenting main features as widgets.

The home page has three main sections:

- The main menu contains menu items used in managing requests and users, viewing style information, and selecting the language of the application.
- User options contain user account options and the sign-out button.

- The dashboard contains widgets that display notifications and pending and due requests, and also serve as shortcuts to main modules.

The home dashboard contains dynamic widgets that enable you to access features in one click, without navigating the main menu. Additionally, double-clicking a request in widget leads you to the request details page.

The Partner Collaboration home dashboard has these widgets:

- The **Due Requests** widget contains requests for samples and quotations that require your feedback on the same day.
- The **Pending Requests** widget contains requests for samples and quotations that require your feedback.
- The **Notifications** widget contains alerts on any modifications or updates made to requests.

  To see additional information about a notification entry, click **Additional Info**.

  To delete the notification entry, click **Delete**.

Specifying the language for the application

Partner Collaboration is available for use in languages other than US English. When you change the language of the application, the main menu and column names are changed from US English to their equivalent translation in the selected language.

1. On the main menu, select a language from the list.
2. Click your Internet browser's **Refresh** icon for the language change to take effect.

Setting filters

Partner Collaboration enables you to filter the display of your requests for samples, quotations, and compliance tests by using criteria or conditions. This feature helps you trim down requests that you view on the application.

1. On the request page, click the **Grid Settings** icon on the rightmost corner of the column headers and select **Show Filter Row**.
2. On the filter row, specify this information:

   Request ID
   Specify a request ID.

   Request #
   Specify a request number.

   Module
   Specify a module.

Module Number
Specify a module number.

Module Name
Specify a module name.

Type
Specify a sub type.

Sub Type
Specify a description.

Supplier
Specify a supplier.

Audit Company
Specify an audit company.

Auditor
Specify an auditor.

Sample Code
Specify a sample code.
Note: This field is displayed only when the request is for samples or samples with cost.

Sample Page Status
Specify a sample page status.
Note: This field is displayed only when the request is for samples or samples with cost.

Main Contact
Specify the main contact person for the request.

Customer Main Contact
Specify the customer main contact for the request.

Work Status
Specify a work status.

Request Status
Specify a request status.

Request Date
Specify a request date.

Expected Audit Date
Specify an expected audit date.
Note: This field is displayed only when the request is for supplier compliance.

Actual Audit Date
Specify an actual audit date.
Note: This field is displayed only when the request is for supplier compliance.

Due Date
Specify a due date.

3 Select any of these filtering conditions for each field:

Filtering condition	Description
Equals	Displays records that contain the exact value that you specify
Does Not Equal	Displays records that do not contain the exact value that you specify
Contains	Displays records that contain the value that you specify
Does Not Contain	Displays records that do not contain the value that you specify
Is Empty	Displays records that do contain a value for this field
Is Not Empty	Displays records that contain a value for this field
Starts With	Displays records that start with the value that you specify
Does Not Start With	Displays records that do not start with the value that you specify
Ends With	Displays records that end with the value that you specify
Does Not End With	Displays records that do not end with the value that you specify

4 On the request page, click the **Filter Menu** icon on the rightmost corner of the filter row and select **Run Filter**.

5 Optionally, to remove filtering of records on the grid, click the **Filter Menu** icon and select **Clear Filter**.

Customizing grid settings

Partner Collaboration enables you to customize the display of requests on the grid. It also provides the option to view requests in other applications, specifically in Microsoft Excel.

Your customized grid settings are saved automatically in your Internet browser. You can reset these settings by clicking **Reset to Default Layout** or clearing your browser cache.

1 On the request page, click the **Grid Settings** icon on the rightmost corner of the column headers.

2 To specify columns displayed on the grid, select **Column Personalization**.

3 Select or clear check boxes for these columns:

- Request ID
- Request #
- Module
- Module Number

- Module Name
- Type
- Sub Type
- Sample Code
- Sample Page Status
- Internal Contact
- Main Contact
- Work Status
- Request Status
- Request Date
- Due Date

4. To return to the default display of the grid, select **Reset to Default Layout**.
5. To view requests displayed on the grid in Microsoft Excel, select **Export to Excel**.

Chapter 2: Using the application

Learn how to use the key modules of Partner Collaboration.

Managing users

The Administration menu function enables you to add and set up users and user access in Partner Collaboration.

Note: The users that you add in Partner Collaboration will also be added as a Partner Collaboration user of the supplier company in Infor Fashion PLM.

1. On the main menu, select **Administration > Manage Users**.
2. Click **Adds a new user**.
3. On the Profile section, specify this information:

   Last Name
   Specify the last name of the new user.

   First Name
   Specify the first name of the new user.

   Email
   Specify the email address of the new user. A message notifying the new user has been granted access will be sent to the email address that you specify in this field.

   Is active
   Select the check box to make the new user active. Only active users can access the application.

   Password changed
   This field is selected only for existing users who have changed their initial, system-generated password.

4. On the Access Mappings section, select or clear the check boxes of the modules that the new user can view:

   Administration
   Enables a user's access to all other modules.

   Sample Request
   Enables access to sample requests.

Quotation
Enables access to requests for quotations.

Compliance Test
Enables access to requests for compliance tests.

Lab Dip
Enables access to requests for lab dips.

Sample with Cost
Enables access to requests for sample with cost.

Supplier Request
Enables access to requests for supplier compliance.

Style Information
Enables access to style information, images, and requests.
Note: Enabling access to this module requires access to the Compliance Test, Quotation, and Sample Request modules.

Material Information
Enables access to material information.

Trim Information
Enables access to trim information.

5. Click **Save**.
6. To notify the new user that access to the application has been granted, click **Send Email Access**.
7. Optionally, to update the list of users, click **Refresh**.
8. Optionally, to remove a user, click **Delete**.

Viewing style information

Partner Collaboration enables you to view styles from Infor Fashion PLM that fulfill at least one of these conditions:

- The style is the item of a sample, quotation, or compliance test request.
- The style has been made available for viewing in Partner Collaboration by enabling settings in Infor Fashion PLM.

  See the *Infor Fashion PLM Online Help* for details on how to make styles in Infor Fashion PLM visible in Partner Collaboration.

1. On the main menu, select **Styles**.
2. To view information of a style, click the **Go to Details** icon of a style item.
   - To view the main details of the style, colorways, sizes, and bill of material (BOM) lines, click the **Information** tab.

- To view the images of the style, sketches, construction, technical drawings, colorways, artworks, pattern, and other images, click the **Images** tab.
- To view requests made for the style, click the **Request** tab.

3 To print a page view of the Information, Images, or Request tab records, right-click the webpage and select **Print**.

Note: Page print covers only the contents which are within the Scale percent and Layout you set as print format configuration. Some columns from the tab fields might not be visible in the print preview.

4 Optionally, click the **Refresh** icon to update the information in each tab.

5 Optionally, to save reports that are attached in the Information tab, click the **Download Attachments** icon.

6 To view the request information of the style, click the right arrow head button.

7 Optionally, double click the request item to go to the request form.

Viewing material information

Partner Collaboration enables you to view materials from Infor Fashion PLM that fulfill at least one of these conditions:

- The material is the item of a lab dip or compliance test request.
- The material has been made available for viewing in Partner Collaboration by enabling settings in Infor Fashion PLM.

  See the *Infor Fashion PLM Online Help* for details on how to make materials in Infor Fashion PLM visible in Partner Collaboration.

1 On the main menu, select **Materials**.

2 To view information of a material, click the **Go to Details** icon of a material item.

- To view the main details of the material, click the **Information** tab.
- To view the images of the material, click the **Images** tab.
- To view requests made for the material, click the **Request** tab.

3 To print a page view of the Information, Images, or Request tab records, right-click the webpage and select **Print**.

Note: Page print covers only the contents which are within the Scale percent and Layout you set as print format configuration. Some columns from the tab fields might not be visible in the print preview.

4 Optionally, click the **Refresh** icon to update the information in each tab.

5 Optionally, to save reports that are attached in the Information tab, click the **Download Attachments** icon.

6 To view the request information of the style, click the right arrow head button.

7 Optionally, double click the request item to go to the request form.

Managing requests for samples

Requests for samples require a supplier's measurements for each point of measure indicated in the style information. Within Partner Collaboration, you have the option to send your measurement values to your customer in Infor Fashion PLM, or save your changes and send your measurements at a later date. After your measurement values are received in the Infor Fashion PLM application, your customer can approve or reject your measurements.

1. On the main menu, select **Requests > Samples**.
2. Click the **Go to Sample Form** icon.
3. Optionally, specify this information:

   Customer Contact
   Specify a name as the customer contact for this request.

   Notes
   Provide notes about this request.

   Free Field 1
   Provide any information related to this request.

4. On the Shipping Details section, specify this information:

   Ship To
   Specify the shipping address.

   Ship Date
   Select a shipping date.

   Delivery Method
   Select a delivery method.

   Tracking #
   Specify a tracking number.

5. On the Request tab, specify values for each point of measure under the Supplier column.
6. Optionally, type a comment on the Comments pane that is located at the right side of the Request tab.

   See Posting comments on page 24.

7. To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
8. Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
9. Click **Yes** to update Work Status from Pending to Sent.

   Note: After you post request information to the customer, you can no longer modify the request details.

10. Click **OK**.

    After your customer updates the status of the sample page in the Infor Fashion PLM application, the request status is updated to Approved, Cancelled, or Rejected.

You can download reports and view images of the sample request.

Download reports

You can only download reports if your user profile has access to the Style Information module.

See Managing users on page 12.

1. On the sample form, click the **Information** tab.
2. Click the **Download Attachments** icon.
   A ZIP file that contains all reports is saved on your local computer.

View images

1. To view all types of images that are included in the request, click the **Images** tab.
2. Optionally, click an image to display it in a new tab.
3. Optionally, click the **Refresh** icon to update the list of images in the tab.

Managing requests for quotations

Requests for quotations require a supplier's prices for each cost element indicated in the style information. Within Partner Collaboration, you have the option to send your pricing to your customer in Infor Fashion PLM, or save your changes and send your prices at a later time. After your prices are received in the Infor Fashion PLM application, your customer can approve or reject your pricing.

1. On the main menu, select **Requests > Quotations**.
2. Click the **Go to Quotation Form** icon.
3. Optionally, specify this information:

   Customer Contact
   Specify a name as the customer contact for this request.

   Notes
   Provide notes about this request.

   Free Field 1
   Provide any information related to this request.

4. On the Quotation section, specify this information:

   Lead Time
   Specify a number.

Lead Time UOM
Select a lead time UOM.

Minimum Qty
Specify a minimum quantity number.

Qty UOM
Select a quantity UOM.

Delivery Method
Select a delivery method.

Terms
Select a delivery term.

Country of Origin
Select a country of origin.

BOM Version
Displays the BOM version used in the request. You cannot modify this field.

Currency
Displays the currency used in the request. You cannot modify this field.

5. On the Costing Elements section, under the Value column, specify a value for each cost element item.
6. Optionally, type a comment on the Comments pane that is located at the right side of the Request tab.

   See Posting comments on page 24.
7. To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
8. Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
9. Click **Yes** to update Work Status from Pending to Sent.

   Note: After you post request information to the customer, you can no longer modify the request details.
10. Click **OK**.

    After your customer updates the status of the quotation page in Infor Fashion PLM, the request status is updated to Approved, Cancelled, or Rejected.

    You can download reports and view images of the quotation request.

Download reports

You can only download reports if your user profile has access to the Style Information module.

See Managing users on page 12.

1 On the quotation form, click the **Information** tab.
2 Click the **Download Attachments** icon.
A ZIP file that contains all reports is saved on your local computer.

View images

1 To view all types of images that are included in the request, click the **Images** tab.
2 Optionally, click an image to display it in a new tab.
3 Optionally, click the **Refresh** icon to update the list of images in the tab.

Managing requests for compliance tests

Requests for compliance tests require a supplier's evaluation and evaluation results for each test or standard in the style, material, or trim item. Within Partner Collaboration, you have the option to send your test results to your customer in Infor Fashion PLM, or save your changes and send your results at a later date. After your test results are received in the Infor Fashion PLM application, your customer can approve or reject your measurements.

1 On the main menu, select **Requests > Compliance Tests**.
2 Click the **Go to Compliance Tests Form** icon.
3 Optionally, specify this information:

Customer Contact
Specify a name as the customer contact for this request.

Notes
Provide notes about this request.

Free Field 1
Provide any information related to this request.

4 On the Tests section, select a country of origin.
5 Under the Test Result column, specify a test result for each test item.
You can also specify test results for color compliance if available.
6 Optionally, type a comment on the Comments pane that is located at the right side of the Request tab.
See Posting comments on page 24.
7 To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
8 Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
9 Click **Yes** to update Work Status from Pending to Sent.

Note: After you post request information to the customer, you can no longer modify the request details.

10 Click **OK**.

After your customer updates the status of the compliance test in Infor Fashion PLM, the request status is updated to Approved, Cancelled, or Rejected.

You can download reports and view images of the compliance tests request.

Download reports

You can only download reports if your user profile has access to the Style, Material, or Trim Information module.

See Managing users on page 12.

1. On the quotation form, click the **Information** tab.
2. Click the **Download Attachments** icon.

   A ZIP file that contains all reports is saved on your local computer.

View images

1. To view all types of images that are included in the request, click the **Images** tab.
2. Optionally, click an image to display it in a new tab.
3. Optionally, click the **Refresh** icon to update the list of images in the tab.

Managing requests for lab dips

1. On the main menu, select **Requests > Lab Dips**.
2. Click the **Go to Lab Dip Form** icon.
3. Optionally, specify this information:

   Customer Contact
   Specify a name as the customer contact for this request.

   Notes
   Provide notes about this request.

   Free Field 1
   Provide any information related to this request.

4. On the Shipping Details section, specify this information:

Ship To
Specify the shipping address.

Ship Date
Select a shipping date.

Delivery Method
Select a delivery method.

Tracking #
Specify a tracking number.

5. In the Item Mix section, specify this information:

   Submit #
   Specify the submission number.

   # of Lab Dips
   Specify the number of lab dips.

6. Optionally, type a comment on the Comments pane that is located at the right side of the Request tab.

   See Posting comments on page 24.

7. To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
8. Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
9. Click **Yes** to update Work Status from Pending to Sent.

   Note: After you post request information to the customer, you can no longer modify the request details.

10. Click **OK**.

    After your customer updates the status of the lab dip in Infor Fashion PLM, the request status is updated to Approved, Cancelled, or Rejected.

    You can download reports and view images of the lab dip request.

Download reports

You can only download reports if your user profile has access to the Style, Material, or Trim Information module.

See Managing users on page 12.

1. On the quotation form, click the **Information** tab.
2. Click the **Download Attachments** icon.

   A ZIP file that contains all reports is saved on your local computer.

View images

1. To view all types of images that are included in the request, click the **Images** tab.
2. Optionally, click an image to display it in a new tab.
3. Optionally, click the **Refresh** icon to update the list of images in the tab.

Managing requests for samples with costs

1. On the main menu, select **Requests > Samples with Costs**.
2. Click the **Go to Sample with Cost Form** icon.
3. Optionally, specify this information:

   Customer Contact
   Specify a name as the customer contact for this request.

   Notes
   Provide notes about this request.

   Free Field 1
   Provide any information related to this request.

4. On the Shipping Details section, specify this information:

   Ship To
   Specify the shipping address.

   Ship Date
   Select a shipping date.

   Tracking #
   Specify a tracking number.

5. On the Point of Measure section, under the supplier column, specify values for each point of measure.
6. On the Quotation section, specify this information:

   Lead Time
   Specify a number.

   Lead Time UOM
   Select a lead time UOM.

   Minimum Qty
   Specify a minimum quantity number.

   Qty UOM
   Select a quantity UOM.

Delivery Method
Select a delivery method.

Terms
Select a delivery term.

Country of Origin
Select a country of origin.

BOM Version
Displays the BOM version used in the request. You cannot modify this field.

Currency
Displays the currency used in the request. You cannot modify this field.

7 On the Costing Elements section, under the Value column, specify a value for each cost element item.
8 Optionally, type a comment on the Comments pane that is located at the right side of the Request tab.
   See Posting comments on page 24.
9 To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
10 Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
11 Click **Yes** to update Work Status from Pending to Sent.
   Note: After you post request information to the customer, you can no longer modify the request details.
12 Click **OK**.
   After your customer updates the status of the sample page in Infor Fashion PLM, the request status is updated to Approved, Cancelled, or Rejected.
   You can download reports and view images of the sample with costs request.

Download reports

You can only download reports if your user profile has access to the Style, Material, or Trim Information module.

See Managing users on page 12.

1 On the quotation form, click the **Information** tab.
2 Click the **Download Attachments** icon.
   A ZIP file that contains all reports is saved on your local computer.

View images

1 To view all types of images that are included in the request, click the **Images** tab.
2 Optionally, click an image to display it in a new tab.
3 Optionally, click the **Refresh** icon to update the list of images in the tab.

Managing requests for supplier compliance

To manage requests for supplier compliance:

1 On the main menu, select **Requests > Supplier Compliance**.
2 Click the **Go to Supplier Compliance Form** icon.
3 On the **Supplier Request Details** section, specify this information:

Auditor
Specify the name of the auditor.

Due Date
Specify the due date of the request.

Expected Audit Date
Specify the expected audit date.

Actual Audit Date
Specify a date by using the date picker.

Audit Result
Specify whether the audit result is Passed or Failed.

4 On the Template section, click **Complete Supplier Compliance Form**.
5 Optionally, provide notes about the request.
6 On the Compliance Form dialog box, select the results for each template. You can also add a note for each template.

Note: To filter the results, select a result in the Filter By options. All templates that have the filtered result is displayed. To clear the filtered result, select **Clear**.

7 Click **Save**.
8 Optionally, drag and drop an image from your local computer to the Images column in the grid to set the main image of the request item. You can also drag and drop files and additional images in the Attachments column.
9 To save your changes without sending information to the Infor Fashion PLM application, click **Save Changes**.
10 Optionally, to send your changes to the Infor Fashion PLM application, click **Post To Customer**.
11 Click **Yes** to update Work Status from Pending to Sent.

Note: After you post request information to the customer, you can no longer modify the request details.

12 Click **OK**.

After your customer updates the status of the supplier compliance in Infor Fashion PLM, the request status is updated to Approved, Cancelled, or Rejected.

Posting comments

You can post comments to requests, and reply to comments from Infor Fashion PLM users, within Partner Collaboration. Additionally, you can post comments that are specific to available request tags or topics, for example, Color, Durability, and Washing. Posting comments is a two-way feature between Partner Collaboration and Infor Fashion PLM users. Comments from both application users are visible to each other.

Note: Available topics or request tags are configured within Infor Fashion PLM.

See “Configuring request tags” in the *Infor Fashion PLM Online Help*.

1. On the request form page, type your comment on the Comments pane that is located at the right side of the page.
2. Click **Post**.
3. To attach files to a comment, click **Attachment**.
4. From your local computer, drag and drop a file to the Attachment field of a comment.

   If the file that you have attached is an image, a thumbnail of that image is displayed.

   If the file that you have attached is not an image, the Attachment field is updated with the number of files in the comment.
5. To reply to a comment, click **Reply**.
6. Type your comment on the given field and click **Post**.
7. Optionally, click an image in a comment to display it in a new tab.
8. Optionally, to view all comments and replies in every request tag, click the **Full Expand** icon.

   To compress comments and replies, click the **Full Collapse** icon.