Lawson Fashion PLM Source User Guide

Version 3.7.1.0
Published July 2013

Publication Information

Release: 3.7.1.0

Publication date: July 3, 2013

Document Number: M3PLMSRCUG_3.7.1.0_W_01

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Source

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Overview

Source helps you plan sourcing, develop cost scenarios, request quotes for products, and manage vendors. All aspects of the same process are now gathered in one application allowing you to streamline your processes, having all of your data in one place, keeping everything linked and interactive. By using the product information your teams are developing you can reduce lead times and begin planning, sourcing, and costing earlier and with more accurate data.

Source provides the ability to source and cost products from multiple vendors in multiple countries while still maintaining and having visibility of the costs and margins achieved across products, seasons, and manufacturers.

Products developed in Product Manager are visible in Source and material costs may be tracked to ensure you have real product costs when requesting vendor quotes.

Sourcing Plans are done at all times within the product lifecycle and need to be generated before detailed product information is available as well as updated throughout the process as products are adopted and Requests for Quotes (RFQ) generated.

A Vendor Management section allows you to enter detailed information on capability, capacity, compliance, performance, and inspection for your vendors.

Launching Source

1. Enter the Source URL in your browser window.

   The Log In page opens.

2. Type your Log In User Name and Password.
3. Click Log In.

   The Home page opens. For more information, see "The Home Page" on page 6.

   If you cannot access Source, your User Name and Password may be wrong or your user status may be inactive. Contact your administrator or try to troubleshoot the login.

Troubleshooting the Login

1. If you have forgotten your password, click the Forgot Your Password? link.

   The Forgot Your Password page opens.
2. Type your User Name, then click Continue.

   A temporary password has been sent to your email address.
3. Return to the Log In page to log in with the temporary password.

   The Change Your Password page opens.
4. Enter and confirm a New Password.
5. Click Continue.

   The Home page opens. For more information, see "The Home Page" on page 6.

The Home Page

The Home page is the starting page of Source. It contains tabs to the various sections (Products, Sourcing, Costing, Vendor Management) as well as links to your working folders if any were set up. You may also access the Product Structure to view products, plans, scenarios, RFQs, and vendors.

The page is divided into Comments, Products, Sourcing Plans, RFQ's, Costing Scenarios and Vendor Management sections that list items that have been modified in the last 3 days.

The Comments list displays the last 10 comments you have accessed, created or updated in the last 3 days. The Products, Sourcing Plans, RFQ's, Costing Scenarios and Vendor Management tables list the last 10 products, plans, scenarios, RFQs, and vendors created or updated in the last 3 days that you have permission to view. All tables can be sorted in ascending/descending order by column.

When selecting a Comment, the Comment Details opens. You may reply to the comment or return to the All Comments list. To create a new comment you must first return to the All Comments tab.

When selecting a Design ID link, the selected product opens and all the information and tabs you have access to are displayed.

When selecting a Plan Name link, the Sourcing Plan details opens with the planning grid displayed.

When selecting the RFQ ID link of a request for quote (RFQ), the Costing Request Detail page opens with the Quote details and all Cost Scenarios displayed.

When selecting the Cost Scenario link the Costing Summary page opens with the Cost Scenarios and Quote details displayed.

When selecting the Vendor name link the Vendor Management Overview page open with all locations listed.

Working Folders are a set of folders that you work in most often. In the Vendor Management section, Working Folders are actually Working Vendors and lists the vendors you are currently working with or in the process of approving.

When selecting a Working Folder, the page view is filtered to display only the items for the selected folder. The same applies when navigating through the Product Structure.

Note: The various Source sections are controlled by user access. If you do not see a section you should have access to, contact your administrator.

Virtual Folders are combinations of the product structures that are merged or filtered to provide a different view of the Product Structure. A virtual folder may be a combination of two or more folders or a filter of one folder to provide the required list of products. They are set up in the Administration module. See the Fashion PLM Administration Guide for details.

Launching Products

From the Source Home page, click the Products tab. The Products section opens. See "Products" on page 10.

Launching Sourcing Plans

From the Source Home page, click the Sourcing Plans tab. The Sourcing Plans Home page opens. See "Sourcing Plans" on page 33.

Launching Costing Scenarios

From the Source Home page, click the Costing Scenarios tab. The Costing Scenarios Home opens. See "Costing Scenario" on page 15.

Launching RFQ

From the Source Home page, click the RFQ tab. The RFQ Home page opens. See "Request for Quotes (RFQ)" on page 24.

Launching Vendor Management

From the Source Home page, click the Vendor Management tab. The Vendor Management Home page opens. See "Vendor Management" on page 47.

Launching Comments

From the Source Home page, click the Comments tab. The All Comments page opens. See "Comments" on page 63.

Accessing Working Folders

From the Source Home page, select the desired folder from the Working Folders section. All products you have access to view are displayed. See "Products" on page 10.

When viewing the Sourcing Plans, Costing Scenarios, or RFQ sections, the product folder lists all plans, scenarios, or RFQs for the folder.

Accessing Virtual Folders

From the Source Home page, select the desired folder from the Virtual Folders section. All products you have access to view are displayed. See "Products" on page 10.

When viewing the Sourcing Plans, Costing Scenarios, or RFQ sections, the virtual folder lists all plans, scenarios, or RFQs for the folder.

Selecting Shortcuts

From the Source Home page, click the Subject link for Comments in the Comments - Most Recent section to open the Comment.

-or-

Click the Design ID, Plan Name, RFQ ID, Scenario, or Business Partner Name link in the Recent Changes sections to open the item.

Tip: Hover your mouse over the link to view the complete item name.

Viewing Comments

From the Home page, click a Comment Subject link. The Comment form opens. See "Viewing Comments" on page 63.

Viewing Products

From the Home page, click a Design ID link. The Product Overview form and all associated forms for this product appear. See "Products" on page 10.

Viewing Sourcing Plans

From the Home page, click a Plan Name link. The Sourcing Plan page appear. See "Sourcing Plans" on page 33.

Viewing Costing Scenarios

From the Home page, click a Scenario link. The Costing Summary page appears. See "Costing Scenario" on page 15.

Viewing RFQs

From the Home page, click a RFQ ID link. The Costing Request Details page appears. See "Request for Quotes (RFQ)" on page 24.

Viewing Vendors

From the Home page, click a Business Partner Name link. The Vendor Overview page and all its locations appear. See "Vendor Management" on page 47.

Browsing the Structure

1 From the Home page, click the Product Structure tab to open the Full Structure window.

   All the Season/Years in your hierarchy that you have access to are listed. Folders with sub-folders appear with +.

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a Product folder from the list. Any products within the selected folder are listed by Design ID.

   The Structure window is automatically closed.

   Tip: You may close the Product Structure window at any time by clicking the Close Window link.

Navigating Pages

The number of pages available in a folder are listed at the top and bottom of the items tables.

1 Click the page number to navigate to the next page.

   Tip: You may also click > to view the next page. Click >> to view the next 5 pages.

2 Click < to navigate back to the previous page or click << for the previous 5 pages.

Sorting Lists

1 From a list in Text view, click the column header to sort the list in ascending order by the selected column.

2 Click the same header again to sort the list in descending order.

3 Click a different column header to sort by a different column in ascending order.

Searching for Items

1 From any product page, enter a Design ID, Product Description, Product ID, Sourcing Plan Name, RFQ ID, Cost Scenario Name, or Business Partner Name in the Search field.

2 Click Go.

   The page is refreshed and lists all items meeting your criteria.

Products

2

Overview

Leveraging product development already accomplished in other Fashion PLM modules, Source enables you to cost in real time. Use available material and labour costs for your products to define costing scenarios and what-if plans, as well as request quotes from vendors associated to your products. With Source, Costing information is intimately linked to your products with all the benefits of shared data between internal teams and business partners without data duplication.

The Product section of Source provides visibility to products currently being developed and sourced. Sharing the same header information, it is easy to find and track your products, costing scenarios, requests for quotes and any vendor quotes submitted.

The Advanced Costing functionality is an integral part of Source and is very closely integrated to the Bill of Materials and Operations pages of Product Manager. Using the 3D BOM allows companies to cost their products by color or size, this information, along with suggested retail prices is linked to Source. Added functionality such as material costing by currency and an exchange rate module ensures that product costs used for quotes are real costs.

The Products page is divided into 2 sections: Products - Recent Changes, and Folders - Recent Changes. Both sections are displayed as lists by default, but you may choose to view the graphic images associated to your Products as well as their respective descriptions.

The Products table lists the last products created or updated in the last 3 days that you have permission to view or edit. Additional products will be listed on a following page.

The Folders table lists the last folders created or updated in the last 3 days that you have permission to view. Both tables can be sorted in ascending/descending order by column.

Browsing the Structure

1 From the Home page, click the Product Structure tab to open the Full Structure window.

All the Season/Years in your hierarchy that you have access to are listed. Folders with sub-folders appear with +.

Tip: You may also search for products using the quick search feature. See .

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a Product folder from the list.

Any products within the selected folder are listed by Design ID. The Structure window is automatically closed.

Tip: You may sort product lists. See "Sorting Lists" on page 9.

Adding a Folder to the Working Folders

From the folder view, click **Action > Working Folder > Add to My Working Folders**. The folder appears in the My Working Folders list.

Removing a Folder from the Working Folders

1 Select the folder you want to remove from the My Working Folders list.

All products you have access to are displayed.

2 Click **Action > Working Folder > Remove from My Working Folders**.

The folder is removed from the My Working Folders list.

Viewing the Recent Products Graphics Grid with Details

From the Products landing page, click **View > View Graphic Grid with Details**. The view is refreshed to the Product Grid with Product Details.

Tip: Depending on the view selected, additional products may be located on other pages. Use the page navigation shortcuts to view all products. See "Navigating Pages" on page 9.

Viewing the Recent Products Graphics Grid without Details

From the Products landing page, click **View > View Graphic Grid without Details**. The view is refreshed to the Product Grid without Product Details.

Viewing Products

1 From a product list, click the Design ID to open the Product Overview form.

2 Click the Costing Scenario tab to view all created cost scenarios.

See "Costing Scenario" on page 15.

3 Click the RFQ tab to view all request quotes.

See "Request for Quotes (RFQ)" on page 24.

4 Click the Comments tab to view all comments associated with the product.

See "Comments" on page 30"Comments" on page 40.

5 Click the History tab to view the product history.

See "History" on page 31.

Product Overview

When viewing products in Source, you will view the Overview page by default. The product Header section which is common to all product pages appears at the top of the page. It displays the general information available for the product such as Design and Product IDs, Season, Product Type, Size Category, etc. The thumbnail image associated with the product is also displayed. You may also view additional product images added in Product Manager.

When working with Carryover products, you can approve different cost scenario(s) for products carried over to new folders. Since carryovers remain linked, you will be able to see approved cost scenarios for both the original and carryover products. You may only modify the current product's cost scenraio; the linked product's scenario is locked.

If a Costing Scenario has been approved, it is displayed in the Placed Order section. All Costing Scenarios for the product may be viewed from the Costing Scenario tab. See "Costing Scenario" on page 15.

Any Sourcing Plans created for this product are listed in the Sourcing Plans section. See "Overview" on page 33.

During the costing process, quotes may have been requested for the product. All external Requests for Quotes are listed on the RFQ page. See "Request for Quotes (RFQ)" on page 24.

You may add product Details and Attachments to products in Source.

Since the product information is limited to costing information, you may also view the product in Product Manager, which launches Product Manager and displays all products forms. Likewise, you may view the product in Line Optimizer.

Editing Product Information

1 From a product list, click the Design ID to open the Product Overview form.

Approve Cost Scenarios and linked Sourcing Plans are displayed.

2 The Product Overview page is the default page for products.

You may add other forms. See "Adding Forms" on page 13.

Tip: To view all product images, click the View Images link in the product Header section. The All Images window displays all product images in read-only format.

3 You may add attachments for the product. See "Adding Attachments" on page 13.

4 Click Save.

Adding Forms

1 From the Product Overview page, click **Action > Forms > Add Forms**.

The Add Form window opens.

2 Click + symbol to view form variations.

3 Select the check box of the form(s) you want to add, then click Save.

Note: Only one variation of a form may be selected.

4 Click Save and Close to select the pages and close the Add Form window.

The page refreshes and all selected forms appear.

Adding a Forms Set

1 From a Product Overview page, click **Action > Forms > Add FormSet**.

The Select Form Set window opens with all available forms listed ().

Note: When adding forms to products with variations, you cannot select a form set if the variation is linked to the parent variation.

2 Select the check box of the Form Set you want to add, then click Select.

The page refreshes and all selected forms appear.

Caution: You may apply a different Form Set to an existing product. Doing so may change the listed forms and their layout. Some information may be hidden as a result of this action.

Adding Attachments

1 From Product Overview page, click the Update Attachment link.

The Attachment List window opens.

2 Click Browse to navigate to your folder and select the desired file.

3 Click Open.

The file appears in the Attachments list.

4 Repeat steps 2 to 3 for all desired files.

Tip: You may also click Remove to remove added files. To download or delete attached file see "Downloading Attachments" on page 14 and "Removing Attachments" on page 14.

5 Click Save.

6 Click the Close Window link to exit the Attachment List window.

The page is refreshed with the added file(s) in the Attachments section.

Downloading Attachments

1 From Product Overview page, click the Update Attachment link.

The Attachment List window opens.

2 Click the attachment name to view it in a new window

3 Click Open to view the attachment and save it to your disk.

-or-

Click Save to save the file to your disk without opening it.

4 Click the Close Window link to exit the Attachment List window.

The page is refreshed.

Removing Attachments

1 From Product Overview page, click the Update Attachment link.

The Attachment List window opens.

2 Click the Perform Action check box of the desired file(s).

3 Click Delete.

The file is removed from the Attachment List.

4 Click Save.

5 Click the Close Window link to exit the Attachment List window.

The page is refreshed without the selected file(s) in the Attachments section.

Viewing the Product in Product Manager

From Product Overview page, click **View > View Product in Product Manager**. Product Manager opens in a different window and the Product Overview page is displayed.

Viewing the Product in Line Optimizer

From Product Overview page, click **View > View Product in Line Optimizer**. Line Optimizer opens in a different window and the Product Overview page is displayed.

Viewing the Cost Variation Summary

1 From the Product Overview page of a product with variations, click the Costing Variation Summary link.

The Costing Variation Summary page opens.

2 Click + and - to expand and close variations.

The Costing Scenarios for expanded variations are displayed.

Note: The Reference and Approved Unit Cost of only Approved scenarios are used in Line Optimizer Planning.

3 Click the Variation ID to view the Overview, Costing Scenario, RFQ, Comments, and History tabs for the variation.

Printing a Product Page

1 From any Product page, click the Printer icon.

A printer friendly version of the page opens in a new window.

2 Click Print Preview to preview the print layout.

3 Click Page Setup to select your print options and Print.

4 Close the Print window.

Costing Scenario

Costing Scenarios are used to set up internal or external costing requirements. When defining your costing needs for a vendor while requesting a quote, a cost scenario is automatically created.

You can create your own costing scenarios allowing you to play with the values and select the best case scenario for your costing needs.

You can also compare internal and external costing scenarios to see how your vendors are doing and select the best vendor quote.

When working with Carryover products, you can approve different cost scenario(s) for products carried over to new folders. Since carryovers remain linked, you will be able to see approved cost scenarios for both the original and carryover products. You may only modify the current product's cost scenraio; the linked product's scenario is locked.

Viewing a Costing Scenario

1 From any product page, click the Costing Scenario tab.

The Costing Scenario page opens.

2 Click a Scenario link.

The Costing Scenario Summary page opens. A message states that the costing fields are being calculated.

3 You may view the Operation List associated to the product.

See "Viewing the Operations List" on page 22.

4 Review the Scenario Header, Scenario Specific Costs, and Retail Pricing sections.

These are read-only and cannot be modified.

Note: The Scenario Specific Costs section may be set up in the Administration module to include user-defined formulas and calculations. Depending on your company setup, you may have additional fields available.

To modify Cost Scenario details, see "Adding Cost Scenario Details" on page 18.

Viewing Cost Scenarios for Variations

For more information, see "Viewing the Cost Variation Summary" on page 15.

Creating a New Costing Scenario

1 From the Costing Scenario page, click **Action > Create New Cost Scenario**.

The Cost Scenario window opens.

2 Define if the scenario is internal or reference:

- **Internal** - the scenario is visible only to internal team members and used for comparison to external cost scenarios.
- **Reference** - the scenario is read-only and used for comparison to external cost scenarios.

3 Select cost by Size or Size Category:

- **Size** - select a Size Category and Size from the list.
- **Size Category** - select a Size Category from the list.

  Tip: You may add additional Size Category/Size rows by clicking Add More.

4 If you want to cost by Color, click the Color option and select the desired Colorways.

5 Click the Delivery option and select the desired Delivery.

-or-

Click Season to cost by the selected Season for the product.

6 Select the type of FOB Costing info required:

- **Full Package** - the BOM sections will be locked and only the full package FOB Cost can be entered.
- **Component**:
    - **With BOM** - a blank BOM page is available and individual materials can be added with Quantity and Cost.
    - **With PM BOM** - the entered material costs (Fabric, Trim, Label, Packaging, Finishing, Assembly) from the Product Manager Bill of Materials is used.

7 Type the Scenario Name in the field.

This field is required.

8 Select a Currency from the list. Any material costs will be calculated in the selected currency based on the exchange rate associated to the Season/Year folder.

9 Click Save.

The Cost Scenario Summary page opens. See "Cost Scenario Details" on page 18.

Copying a Costing Scenario

1 From the Costing Scenario page, select the scenario you want to copy.

2 Click **Action > Copy Cost Scenario**.

The Copy Scenario window opens.

3 Enter the new scenario name in the Copy Scenario Name field.

4 If you want to also copy the details entered on the Cost Scenario Summary page, click the Copy the existing data option.

5 Click Copy.

A confirmation message appears. The Cost Scenario Summary page for the copied scenario opens. A message states that the costing fields are being calculated.

Renaming a Costing Scenario

1 From the Costing Scenario page, select the scenario(s) you want to rename.

Tip: You may rename multiple scenarios at once by selecting more than one scenario from the Costing Scenarios list.

2 Click **Action > Rename Cost Scenario**.

The Rename Scenario window opens.

3 Enter the New Scenario Name in the field.

4 Click Rename.

Deleting a Costing Scenario

1 From the Costing Scenario page, select the scenario(s) you want to delete.

Tip: You may delete multiple scenarios at once by selecting more than one scenario from the Costing Scenarios list.

2 Click **Action > Delete Cost Scenario**.

A confirmation message appears.

3 Click OK.

The selected costing scenario is removed.

Caution: Removing a cost scenario will delete all associated costing details. This action may not be undone.

Copying a Costing Scenario as a Reference Scenario

1 From the Costing Scenario page, select the scenario you want to copy as a reference scenario.

2 Click **Action > Copy as Reference Cost Scenario**.

The page is refreshed and the copied scenario is listed as Copy of....

3 You may rename the Cost scenario.

See "Renaming a Costing Scenario" on page 17.

Unlocking the Reference Costing Scenario

1 From the Costing Scenario page, select the Reference scenario you want to unlock for editing.

2 Click **Action > Unlock Reference Cost Scenario**.

The Reference Scenario Summary page is unlocked and can be edited.

Cost Scenario Details

Adding Cost Scenario Details

1 From the Cost Scenario Summary page, select a Status from the list.

Note: Once the scenario Status is Approved, its costs will be used in the Line Optimizer Planning page.

2 From the Scenario Header section, add recipient information:

   a Select a PO Recipient from the list.

   b Select a Manufacturer Recipient from the list.

   The Selected Manufacturer's Country is automatically populated.

   c If you do not select a Manufacturer Recipient, you may select a Manufacturer Country from the list.

   Note: A scenario Recipient can only be added if the scenario was created from a RFQ.

3 You may view the exchange rate table associate to the Season/Year folder.

   See "Viewing the Cost Scenario Comparison Page" on page 22.

4 Add information to the FOB Costing section.

   See "Adding FOB Costing Information" on page 23.

5 You may view the Line Optimizer Planning Summary by clicking the LO Planning Summary link.

   This opens the Summary Total page for the product in a separate window.

6 Add, copy, or remove costing columns.

   See "Adding a Costing Column" on page 21, "Copying a Costing Column" on page 21, or "Removing a Costing Column" on page 21.

7 Select the Include in Costing check box of the scenario columns you want to include in the Summary calculations.

8 Compare internal and external cost scenarios.

   See "Viewing the Cost Scenario Comparison Page" on page 22.

9 Type comments, notes, or instructions in the Details field.

10 You may also and Attachments.

   See "Adding Attachments" on page 15

11 Click Save.

Adding FOB Costing Information

1 From the FOB Costing section of the Cost Scenario Summary page, enter the Quantity/ Unit for the first Costing column.

Note: Standard formulas for the Summary page require a Quantity to be calculated. Since the Costing page is customizable the elements and section of the page may vary depending on your system configuration.

2 If working with a Component scenario, enter BOM Item costs.

These costs are added to the Total and Final Costs.

Note: The BOM Item section is locked if the cost scenario is a Full Package scenario.

3 Enter costs for the Other Item section.

These costs are added to the Total and Final Costs.

4 Add any required information to the Scenario Specific Costs section.

User-based formulas may be created and calculated in this section. See the Fashion PLM Administration online help for details.

5 Click Save.

Adding BOM Costing Details

1 From the Cost Scenario Summary page, click the Costing Detail link in the header of the costing column.

The BOM Overview page opens.

2 Add fabric, trim, label, packaging, finishing, and assembly items.

See the BOM section of the Fashion PLM Product Manager online help for details.

3 For each BOM item, add the following information:

- **a** Type a Quantity in the field.
- **b** Select a Quantity UOM (unit of measure) from the list.
- **c** Type the Duty % in the field.
- **d** If the Duty is exempted from the price, click the Exempt check box.
- **e** Enter the Local Price and select the Currency for the BOM item.

  The item price is automatically calculated in the scenario currency and is displayed in the Scenario Price field.

  Note: You may only select a Local Currency for which an exchange rate has been specified in the Administration module. See "Viewing the Exchange Rate Table" on page 22.

4 Click Save.

The Total Cost is auto-calculated.

5. Click the Return to Costing Scenario Summary link.

   The Costing Summary page opens and entered costs are displayed in the BOM Items section.

Adding a Costing Column

1. From the Cost Scenario Summary page, click **Action > Add Costing Column**.

   The Add Costing Column window opens. The Costing Scenario options selected are listed.
2. Select a Size Category and/or Size from the list.
3. Select a Color from the list.
4. Select a Delivery or Season from the list.
5. Click Add.

   The column is added.

Copying a Costing Column

1. From the FOB Costing section of the Cost Scenario Summary page, select the Perform Action check box of the Costing column you want to copy.
2. Click **Action > Copy Costing Column**.

   The Copy Costing Column window opens. The Costing Scenario options selected are listed.
3. Select a Size Category and/or Size from the list.
4. Select a Color from the list.
5. Select a Delivery or Season from the list.
6. If you want to also copy the details entered in the column, click the Copy the existing data option.
7. Click Copy.

   The column is copied.

Removing a Costing Column

1. From the FOB Costing section of the Cost Scenario Summary page, select the Perform Action check box of the Costing column(s) you want to remove.
2. Click **Action > Remove Costing Column**.

   A confirmation message appears.
3. Click OK.

   The selected column is removed.

Viewing the Operations List

1. From the Cost Scenario Summary page, click the Operations/Labor link above the product Header section.

   The Operation List page opens.

2. Select an Operations List from the list.

   The associated information appears.

   Note: Operations Lists are set up in the Administration module. See the Fashion PLM Administration online help for details.

3. Click Save.

   The Total Labour Cost is automatically calculated and will appear in the Labor field of the BOM Item section of the Costing column.

Tip: You may click the Return to Cost Scenario Summary link to return to the Cost Scenario details.

Viewing the Cost Scenario Comparison Page

1. From the Costing Scenario Summary page, click **View > Costing Scenario Comparison**.

   The Costing Scenario Comparison page opens.

2. Select the check box of the scenarios you want to compare, then click Refresh.

   The selected scenarios are displayed side by side.

Approving/Rejecting a Cost Scenario

1. From the Scenario Status section of the Cost Scenario Summary page, select Approve or Rejected from the Status list.

2. Click Save.

   The page is refreshed and locked. The approved Cost Scenario is listed in the Placed Order section of the Overview page.

Viewing the Exchange Rate Table

1. From the Scenario Header section of the Costing Scenario Summary page, click the View Exchange Rate Table link.

   The View Exchange Rate Table window opens.

2. Click the Close Window link to exit the window.

   Note: The Exchange Rate table is set up in the Administration module. See the Fashion PLM Administration online help for details.

Selecting a Variation for Costing

1. From the Product Overview page of a product with variations, click **Action > Select Variation Cost for Line Optimizer**.

   The Select Variation Cost window appears.
2. Select which variation cost will be used for Line Optimizer Planning, the click Save.

   A successful confirmation appears.
3. Click the Close Window link.

Creating Combined Costing for Variations

1. From the Costing Variation Summary page, select the variation costing scenarios that you want to combine for costing.
2. Click **Action > Create a Combine Costing**.

   The Input Quantity window opens.
3. Type the Quantity desired for each variation selected.
4. Click Save.

   The Combine Costing page appears.
5. Type a Name for this combination in the field.
6. Enter a Description in the field.
7. Click Save.

   The Combine Costing appears in the Combine Costing Table of the Costing Variation Summary page.
8. You may add or remove costing scenarios for a Combined Costing.

   See "Adding a Costing Scenario to a Combine Costing" on page 23.

Adding a Costing Scenario to a Combine Costing

1. From the Combine Costing page, click **Action > Add a Costing Scenario**.

   The Add Variation Costing Table window opens.
2. Select the Costing Scenario you want to add, then click Add.

   The Costing Scenario is added to the scenario list.

   The Totals are recalculated.
3. Click Save.

Removing a Costing Scenario from a Combine Costing

1. From the Combine Costing page, select the Costing Scenario you want to remove.

2 Click **Action > Remove a Costing Scenario**.

The scenario is removed from the table. The Totals are recalculated.

3 Click Save.

Removing a Combined Costing

1 From the Costing Variation Summary page, select the Combine Costing you want to remove.

2 Click **Action > Delete Combine Costing**.

The Combined Costing is removed from the Combine Costing Table.

3 Click Save.

Creating Compare Costing for Variations

1 From the Costing Variation Summary page, select the variation costing scenarios that you want to combine for costing.

2 Click **Action > Create a Compared Costing**.

The Compared Costing Variation page appears.

3 Type a Name for this combination in the field.

4 Enter a Description in the field.

5 Click Save.

The Compared Costing appears in the Compared Costing Variations Table of the Costing Variation Summary page.

6 You may add or remove costing scenarios for a Compared Costing.

See "Adding a Costing Scenario to a Combine Costing" on page 23.

Removing a Compared Costing

1 From the Costing Variation Summary page, select the Compared Costing you want to remove.

2 Click **Action > Delete Compared Costing Variations**.

The Compared costing is removed from the Compared Costing Variations Table.

3 Click Save.

Request for Quotes (RFQ)

Requests for Quotes (RFQ) allows you to request cost quotes directly to your business partners. Using the existing product information, you can define your cost needs such as sizing, colors, and deliveries, as well as specify the desired currency for quotes.

Your business partners will receive a notification with a link towards the product in Source, allowing them to enter their quote information directly on the request created. This ensures that all of your cost and quote information remains together in one place and avoid data duplication.

Since your request details are saved as a Cost Scenario when requesting quotes, you may then compare internal, reference and external quotes on the Costing Scenario Comparison page. This offers a detailed side by side view of all quotes submitted for a product making it easy to approve and reject business partner quotes. See "Viewing the Cost Scenario Comparison Page" on page 22.

Viewing an RFQ

1. From any product page, click the RFQ tab.

   The RFQ List page opens.
2. Click the quote + to view the list of scenarios created for the quote request.
3. Click the RFQ Name link to open the Costing Request Detail page.
4. Click the Scenario name links to view the Costing Scenario Details page.

Creating a New RFQ

1. From the RFQ List page, click **Action > Create RFQ**.

   The New RFQ page opens.

   Tip: You may also click New to open the New RFQ page.
2. Enter the Costing Type requested for the quote.

   See "Adding Costing Type Information" on page 27.
3. Enter the Costing Request information.

   See "Adding Costing Request Information" on page 28.
4. Add any Attachments to the request.

   See "Adding Attachments" on page 13.
5. Click Save.

Copying an RFQ to a Variation

1. From the RFQ List page, select the RFQ you want to copy.
2. Click **Action > Copy RFQ to a Variation**.

   The Copy RFQ to Variation window opens.
3. Select the costing scenario you want to copy and click Select.

The Copy RFQ window appears.

4 Select the variation you want to copy the RFQ to and click OK.

The RFQ and associated scenario(s) is added to the variation.

Note: Certain pages must be copied or linked when copying RFQs and Cost Scenarios. See the following table for a list of these rules.

Cost Scenario Type	Copied or Linked Pages
Full Package	Overview and Colorways page must be copied or linked
Component with BOM	Overview and Colorways page must be copied or linked.
Component with PM BOM	Overview and Colorways page must be linked.

5 Click Save.

Moving an RFQ to a Variation

1 From the RFQ List page, select the RFQ you want to move.

2 Click **Action > Move RFQ to a Variation**.

The Move RFQ window opens.

3 Select the variation you want to move the RFQ to and click OK.

The RFQ and associated scenario(s) is moved to the variation.

4 Click Save.

Certain pages must be copied or linked when moving RFQs and Cost Scenarios. See the table in "Copying an RFQ to a Variation" on page 25 for a list of rules.

Cancelling an RFQ

1 From the RFQ List page, select the RFQ you want to cancel.

2 Click Action > Cancel RFQ.

A confirmation message appears.

3 Click OK.

The quote request and its scenario(s) is cancelled and is locked.

Renaming an RFQ

1 From the RFQ List page, select the RFQ you want to rename.

2 Click **Action > Rename RFQ**.

The Rename RFQ window opens.

3 Enter the New Request Name in the field.

4 To also rename the associated Costing Scenario(s), select Rename its Associate Scenarios.

The associated Scenario will automatically be the RFQ Name plus an auto-generated number.

5 Click Rename.

The quote request is renamed.

Deleting an RFQ

1 From the RFQ List page, select the RFQ(s) you want to delete.

2 Click **Action > Delete RFQ**.

A confirmation message appears.

3 Click OK.

The quote request and its scenario(s) is deleted.

Costing Request Detail Page

Adding Costing Type Information

1 From the Costing Type section of the Costing Request Details page, define if the scenario is an internal or external request for quotes:

- **Internal RFQ** - the request is visible only to internal team members.
- **External RFQ** - the scenario is visible to business partners who will be able to add their quote information.

Note: Only External RFQs can be shared with Line Optimizer planning once they are Approved.

2 Select a Size or Size Category option:

- **Size** - select a Size Category and Size from the list.
- **Size Category** - select a Size Category from the list.

Tip: You may add additional Size Category/Size rows by clicking Add More.

3 If you want to cost by Color, click the Color option and select the desired Colorways.

4 Click the Delivery option and select the desired Delivery.

-or-

Click Season to cost by the selected Season for the product.

5 Select the type of FOB Costing info required:

- **Full Package** - the BOM sections will be locked and only the full package FOB Cost can be entered.
- Component:
  - **With BOM** - a blank BOM page is available and individual materials can be added with Quantity and Cost.
  - **With PM BOM** - the entered material costs (Fabric, Trim, Label, Packaging, Finishing, Assembly) from the Product Manager Bill of Materials is used.

Adding Costing Request Information

1 From the Costing Request section of the Costing Request Details page, type the RFQ Name in the field.

This field is required.

2 Type the Scenario Name in the field.

If left blank the Scenario Name will automatically be the RFQ Name plus an auto-generated number.

3 Add a Business Partner for this request.

See "Selecting Request Recipients" on page 29.

Your user name is automatically selected in the Requested By list.

4 You may select the name of the person ordering this request if different.

5 Select a Status from the list.

6 Select a Duty Category from the list.

7 Select a Request Currency from the list.

8 Type the Duty % in the field.

9 Type the HTS Code in the field.

10 Click the calendar icon to open the calendar and select the First Ship Date.

11 Click the calendar icon to open the calendar and select the In House Date.

12 Click the calendar icon to open the calendar and select the Date Received.

13 Click the calendar icon to open the calendar and select the Date Needed.

14 Type instruction, notes, comments in the Details field.

15 You may add Attachments for the request.

See "Adding Attachments" on page 13.

16 Click Save.

A notification is sent to the select Business Partners.

Selecting Request Recipients

1 From the Costing Request Details page, click the Request Of link to open the Assign Locations window

Note: The Business Partners that have this product released to them are automatically added for the requests.

2 Select the Business Partner Location from the list.

All available Locations are listed.

3 Select a Location and click > to move it to the Assigned Locations list.

4 Click Save and Close Window.

5 Click the Direct Request To link to open the Assign Users window.

6 Select the Location from the list.

All available Users are listed.

7 Select a User and click > to move it to the Assigned Users list.

8 Click Save and Close Window.

9 Click the Copy To link if you want to copy this request to an additional Business Partner.

10 Repeat the above steps.

11 Click the Copy Request To link and repeat the steps above to select the user(s) for the select Business Partner.

Approving a Scenario

1 From the Costing Request Details page, select the scenario you want to approve.

2 Click **Action > Approve Scenario**.

The scenario status is changed to Approve and is displayed in the Place Order section of the Overview page.

Rejecting a Scenario

1 From the Costing Request Details page, select the scenario you want to approve.

2 Click **Action > Reject Scenario**.

The scenario status is changed to Rejected.

Copying a Scenario

1 From the Costing Request Details page, select the scenario you want to copy.

2 Click **Action > Copy Scenario**.

The Copy Scenario window opens.

3 Enter the New Scenario Name in the field.

4 If you want to also copy the details entered on the Cost Scenario Summary page, click the Copy the existing data option.

5 Click Copy.

A Confirmation message appears. The Cost Scenario Summary page for the copied scenario opens. A message states that the costing fields are being calculated.

Renaming a Scenario

1 From the Costing Request Details page, select the scenario you want to rename.

Tip: You may rename multiple scenarios at once by selecting more than one scenario from the Costing Scenarios list.

2 Click **Action > Rename Scenario**.

The Rename Scenario Name window opens.

3 Enter the New Scenario Name in the field.

4 Click Rename.

Comments

Comments are meant to act as email messages relating to various aspects of the costing process. In order to provide ease of navigation, Comments can be added at various levels.

You may create a Comment from any Product form, in which case the Comment will be associated to the specific product form.

From the Comments tab of a specific Product, you will see all existing Comments relating to the product listed in descending order from the Last Updated.

When a comment is sent, an email with links to the product is created. The recipients can simply click the Design ID link to open the specific product. If they are not logged into the system, the system will open to the Source login page.

The Comments tab is described in detail in its own chapter, see "Comments" on page 63 for details.

Viewing Product Comments

1 Click the Comments tab of a product.

The Comments related to the current product, to which you have access, appear in a text list sorted by the most recent at the top.

Note: You may view the 10 most recent Comments across all products from the Source Home page Comments-Most Recent list.

2 Click + to see the embedded replies to a Comment.

3 Click a Comment's Subject link to open the General Comments page with the comment's details and all previous comments (if there is a chain) in a read-only view.

4 Click the Return to All Comments link to return to the comments list.

Working with Comments

See "Comments" on page 63 for a list of procedures and functions.

History

The History page lists detailed information about when the product was updated and accessed. The data separated into six sections:

- **Edited** - edit captures any time a change was made to a section of a form.
- **Read** - read captures when a product was viewed.
- **Deleted Scenarios** - deleted scenarios are listed and can be restored.
- **Deleted RFQs** - deleted RFQs are listed and can be restored.
- **Archived Scenarios** - a product is archived when it moves from one status to another. When a product is archived a snapshot of the product is captured.
- **Attachment Archive** - an attachment is archived when a file of the same name is uploaded to the same location or the file is updated with the attachment handler.

Restoring a Deleted Scenario

1 From the Deleted Scenarios section of the History page, select the deleted scenario you want to restore.

2 Click **Action > Restore Deleted Scenario**.

A confirmation message appears.

3 Click OK.

The scenario is restored to the Costing Scenario page.

Restoring an RFQ

1 From the Deleted RFQs section of the History page, select the deleted RFQ you want to restore.

2 Click **Action > Restore RFQ**.

A confirmation message appears.

3 Click OK.

The RFQ is restored to the RFQ page.

Restoring an Archived Scenario

1 From the Archived Scenarios section of the History page, select the scenario you want to restore.

2 Click **Action > Restore Archived Scenario**.

A confirmation message appears.

3 Click OK.

The scenario is restored to the Costing Scenario page.

Restoring Attachments

1 From the Archived Attachment section of the History page, select the attachment you want to restore.

2 Click **Action > Restore Attachment**.

A confirmation message appears.

3 Click OK.

The attachment is restored to the Costing Scenario page.

Sourcing Plans

3

Overview

By creating Standard and What If plans, you can plan units by manufacturer, location, country and region. You may also compare submitted cost quotes and determine which plan best suits your sourcing needs.

Once you have selected your ideal sourcing plans, you can share them with your internal strategic teams and business partners and get soft commitments and agreements for your production.

Sourcing plans are the core of the system in that they allow you to plan for a range or season, dependent on the level of the Product Structure (real or virtual folders). You may also do What-If planning as well as compare plans to enable accurate scheduling and planning of their requirements.

There are 2 types of sourcing plans available:

- **Standard Plan** - created from all the Products within a particular Product folder (real or virtual).
- **What-If Plan** - allows you to select different products from the current folder and view the Vendors and RFQs generated in order to define what if plans for the Sourcing Plan.

When creating a new sourcing plan using the products located in a folder (real or virtual), you can add Deliveries and a column is created for each required delivery.

Source then creates a plan arranged by Region, Country, Manufacturer, Product and all Products that are not in Pre-Concept status within the folder are added to the plan.

Products within the folder that do not have a Manufacturer assigned to them are listed as Unassigned Products. You can show or hide these products.

Last Year fields are either auto-populated from the previous years figures or can be entered manually.

Once the Planned fields are entered , the calculated %, Total Units and Total Cost field are auto-calculated using the Retail Price field from Line Optimizer or Product Manager.

Viewing Sourcing Plans

1 From a product or virtual folder, select a Plan Name link to open the plan details page.

Tip: Use the + and - to open and collapse Region, Country, and Manufacturer details.

The default view for all Sourcing Plans is by Region.

2 You may select a different view option from the View menu:

- **View Plan by Product** - the plan grid displays the sourcing plan information by products.
- **View Plan by Product Status** - the plan grid displays the sourcing plan information for products of the selected status.
    - You will need to select the product Status from the Select Product Status window.
- **View Plan by Manufacturer** - the plan grid displays the sourcing plan information by Manufacturer.
- **View Plan by Reference** - the plan grid displays the sourcing plan information compared to the Approved Reference Scenario.
    - The Reference Scenario opens in a different window. Click the Close Window link to exit the window.
- **Hide/Show Unassigned Product** - the Unassigned Products are hidden or displayed.
- **Hide/Show Last Year** - the Last Year columns (Delivery, Calc %, Total Units, Total Costs) are hidden or displayed.
- **Hide/Show Working Folders** - the My Working Folders navigation bar is hidden or displayed.

Comparing Sourcing Plans

1 From the Sourcing plan details page, click **View > Compare Sourcing plan**.

The Full Structure window appears.

2 Select a product or virtual folder.

The Select Sourcing Plan window opens with all available plans listed.

3 Select the option button of a Sourcing Plan, then click Select.

The Sourcing Plan Details page appears.

Since the Sourcing Plan Details page opens in a separate window, you can compare the plans using windows functions (tile windows, resize, move, and others.)

4 Click the Close Window link to exit the window.

Dropping a Sourcing Plan

1 From a product folder, select the sourcing plan(s) you want to drop.

2 Click **Action > Drop Sourcing Plan**.

A confirmation message appears.

3 Click OK.

The Sourcing Plan is dropped and archived on the History page.

Deleting a Sourcing Plan

1 From a product folder, select the sourcing plan(s) you want to delete.

2 Click **Action > Delete Sourcing Plan**.

A confirmation message appears.

3 Click OK.

The Sourcing Plan is deleted and archived on the History page where it will remain for 3 days.

Printing a Sourcing Plan

1 From any Sourcing Plan page, click the Printer icon.

A Printer friendly version of the page opens in a new window.

2 Click Print Preview to preview the print layout.

3 Click Page Setup to select your print options and Print.

4 Close the Print window.

Restoring Dropped/Deleted Plans

1 From the History page, select the plan(s) you want to restore from the Dropped Plan or Deleted Plan section.

2 Click Restore.

A confirmation message appears.

3 Click OK.

The plan is restored to the folder.

Restoring Archived Plans

1 From the History page, select the plans you want to restore from the Archived Plan section.

2 Click Restore.

A confirmation message appears.

3 Click OK.

The plan is restored to the folder and the current plan is archived.

Standard Sourcing Plans

Standard plans allow you to assort units by manufacturing region and location. Once you have determined your optimal sourcing plan, you can communicate annual, seasonal, and delivery plans with your business partners and proceed to buying for production.

Editing a Standard Plan's Information

1. From the Standard Plan details page, modify the Plan Name if needed.
2. Select a Status from the list.

   This field is required.

   Note: When a plan Status is changed, it is automatically archived in the folder's History. See "Restoring Archived Plans" on page 35 for details on restoring archived plans.

   Important: Once the plan has been Approved, you cannot add Regions, Countries or Manufacturers.

3. Add or remove Regions for the plan.

   See "Adding a Region to a Plan" on page 37 or "Removing a Region from a Plan" on page 37.
4. Add or remove Countries for the plan.

   See "Adding a Country to a Plan" on page 37 or "Removing a Country from a Plan" on page 37.
5. Add or remove Manufacturers for the plan.

   See "Adding a Manufacturer to a Plan" on page 38 or "Removing a Manufacturer from a Plan" on page 38.
6. Drop or restore products for the plan.

   See "Dropping Products from a Plan" on page 41 or "Restoring a Product to a Plan" on page 41.
7. Click Save.

Creating a New Standard Plan

1. From a product folder, click **Action > Create Standard Plan**.

   The Select Deliveries window appears.
2. Select a Delivery from the list, then click OK.

   The Create Standard Plan page opens.
3. Type a Plan Name in the field.

   The Total Units Last Year, Total Units Last Planned are pulled in from the previous saved plan's grid. The Total Unit Last Committed calculates the units in the Products Placed Orders. These fields are locked and read only.

4 Type comments, notes, or instructions in the Details field.

5 You may also and Attachments.

   See "Adding Attachments" on page 15.

6 Click Save.

Adding a Region to a Plan

1 From the Standard Plan details page, click **Action > Add Region to Plan**.

   The Region List window opens.

2 Select a Region from the list, then click Submit.

   The page is refreshed and the region is added to the plan.

3 Click Save.

Removing a Region from a Plan

1 From the Standard Plan details page, select the Region you want to remove.

2 Click **Action > Remove Region from Plan**.

   A confirmation message appears.

3 Click OK.

   The page is refreshed and the Region is removed from the plan.

4 Click Save.

Adding a Country to a Plan

1 From the Standard Plan details page, click **Action > Add Country to Plan**.

   The Country List window opens.

2 Select a Region from the list.

   The list of Countries is automatically filtered.

3 Select a Country from the list, then click Submit.

   The page is refreshed and the Country and associated Region are added to the plan.

4 Click Save.

Removing a Country from a Plan

1 From the Standard Plan details page, select the Country you want to remove.

2 Click **Action > Remove Country from Plan**.

A confirmation message appears.

3 Click OK.

The page is refreshed and the Country is removed from the plan.

4 Click Save.

Adding a Manufacturer to a Plan

1 From the Standard Plan details page, click **Action > Add Manufacturer (from List)**.

The Full Structure window opens.

2 Select a Manufacturer location from the list.

The page is refreshed and the Manufacturer, its associated Region and Country are added to the plan.

Note: You may only add manufacturers that have a Region and Country associated to them in the Administration module.

3 Click Save.

Removing a Manufacturer from a Plan

1 From the Standard Plan details page, select the Manufacturer you want to remove.

2 Click **Action > Remove Manufacturer from Plan**.

A confirmation message appears.

3 Click OK.

The page is refreshed and the Manufacturer is removed from the plan.

Caution: You may not remove a Manufacturer with an Approved Costing Scenario.

4 Click Save.

Searching and Adding a Manufacturer

1 From the Standard Plan details page, click **Action > Add Manufacturer (from List)**.

The Find Vendor window opens.

Tip: You may load a saved search. See "Loading a Saved Search" on page 40.

2 You may search for different types of fields.

Select the section from which to add your criteria:

- **General Fields** - Vendor Name, Country, Region, Related to, Status, Contact Name.
- **Capability Fields** - Capability Index, Product Type, Category.
- **Capacity Fields** - Capacity Index, Total/Monthly Capacity, Category, and others.
- **Compliance Fields** - Compliance Index, Management Systems, Wages + Hours, Child Labour, Discrimination, and others.
- **Performance Fields** - Performance Index, Quality/Price Rating, Deliver/Response Rating.
- **Inspection Fields** - Inspection Index, Last/Next Inspection Date, Type, Company.

3 Select your search criteria:

a Select a Field from the list.

This will filter the list of Operators. Depending on the Field type, the Search Criteria may be a free text field, a calendar, or a drop-down list.

b Select an Operator from the list.

The options available will vary depending on the Field selected. See the following table for a list of operators and their use.

Operator	Use
=	is equal to search criteria
<>	is greater or lesser than search criteria
<	is greater than search criteria
>	is lesser than search criteria
Contains	field contains search criteria
Begin With	field begins with search criteria
Is Null	field does not contain data
Is Not Null	field contains data

c Add search information:

- **For Text fields** - type the information in the field.

- **For List fields** - select an option from the drop-down list.
- **For Date fields** - use the calendar to select a date.

  Tip: You may click Clear at anytime to clear all search criteria from the window. This will provide a blank search page.

4 Select a search manner:

- **And** will search for items meeting every listed criteria.
- **Or** will search for items meeting all listed criteria.

5 Use the bracket operators as needed to build complex search formulas.

6 Repeat for all fields in all sections, as needed.

Tip: You may also Save this search for future use. See "Saving a Search" on page 40.

7 Click Find.

The page is refreshed and all vendors meeting you criteria are listed.

Tip: If the search result does not provide the desired vendor, click Back to return to the Search page and modify your search criteria.

8 Click a Location Name to add the vendor to the plan.

The page is refreshed and the Manufacturer, its associated Region and Country are added to the plan.

9 Click Save.

Saving a Search

1 From the Find Vendor window, type a Search Name in the field.

2 Select a Save Type:

- **Public** - The search will be available for all users.
- **Private** - The search will only be available to you.

3 Click Save.

Loading a Saved Search

1 From the Find Vendor page, click Load Search.

The Vendor Search Schema List opens.

2 Select a search from the Public or Private sections.

3 Click Load.

The saved search criteria appears.

4 Add or remove criteria and click Find.

All vendors meeting the criteria appear.

Making a Standard Plan the Primary Plan

1 From a product folder, select the Standard plan you want to make the primary plan.

2 Click **Action > Make Primary Plan**.

The page is refreshed and the plan is identified as the primary plan.

Dropping Products from a Plan

1 From the Standard Plan details page, select the product(s) you want to drop from the plan.

Caution: You may not drop a product with an Approved Costing Scenario.

2 Click **Action > Drop Products from Plan**.

A confirmation message appears.

3 Click OK.

The page is refreshed and the product(s) is removed.

Restoring a Product to a Plan

1 From the Standard Plan details page, click **Action > Restore Product to Plan**.

The Restore Product to Plan window appears.

2 Select the Dropped Product(s) you want to restore to the plan, then click Restore.

The page is refreshed and the plan modified.

3 Click Save.

What If Sourcing Plans

Source allows you to do What If sourcing plans and look at sourcing plans by cost quote by vendor. This enables you to compare plans and find the most cost effective plan for a set of parameters specified.

Editing a What If Plan's Information

1 From the What-If Plan details page, modify the Plan Name if needed.

2 Select a Status from the list.

This field is required.

3 Click Save.

Creating a New What-If Plan

1 From a product folder, click **Action > Create What If Plan**.

The Select Deliveries window appears.

2 Select a Delivery from the list, then click OK.

The Create What-If Plan page opens.

3 Type a Plan Name in the field.

All products available in the folder are automatically added to the plan.

4 Select a date for each selected Delivery.

5 For each product:

a Select a Manufacturer location from the list.

The associated Scenarios for the product are auto-filtered.

b Select a Scenario from the list.

The Costing Scenario's information appears.

6 Type comments, notes, or instructions in the Details field.

7 You may also and Attachments.

See "Adding Attachments" on page 13.

8 Click Save.

Costing Scenarios

4

Overview

The Costing process today needs to be more effective, faster, and extremely accurate. Costing Scenarios allow you to predict product and development costs using real information. Starting earlier in your development cycle, you can begin to map out material and labour costs before samples are generated. Compare internal cost scenarios with external ones, get a side by side view of vendor quotes, and make financial decisions with all the information you need.

Costing Scenarios are used to set up internal or external costing requirements. When defining your costing needs for a vendor in requesting a quote, a cost scenario is automatically created.

You can create your own costing scenarios allowing you to play with the values and select the best case scenario for your costing needs.

Compare internal and external costing scenarios to see how your vendors are doing and select the best vendor quote.

Browsing the Structure

1 From the Home page, click the Product Structure tab to open the Full Structure window.

   All the Season/Years in your hierarchy that you have access to are listed. Folders with sub-folders appear with +.

   Tip: You may also search for costing scenarios using the quick search feature. See "Searching for Items" on page 9.

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a product folder from the list.

   All Costing Scenarios within the selected folder are listed the most recently modified appearing first.

   Tip: You may sort the scenario list. See "Sorting Lists" on page 9.

Viewing a Costing Scenario

1 From the Costing Scenario landing page, or from a product folder, click the Scenario link.

The Costing Scenario Summary page for the product opens.

2 You may view the Operation List associated to the product.

See .

3 Review the Scenario Header, Scenario Specific Costs, and Retail Pricing sections.

These are read-only and cannot be modified.

Note: The Scenario Specific Costs section may be set up in the Administration module to include user-defined formulas and calculations. Depending on your company setup, you may have additional fields available.

To modify Cost Scenario details, see "Adding Cost Scenario Details" on page 18.

Printing a Costing Scenario Page

1 From any Costing Scenario page, click the Printer icon.

A printer friendly version of the page opens in a new window.

2 Click Print Preview to preview the print layout.

3 Click Page Setup to select your print options and Print.

4 Close the Print window.

Working with Cost Scenarios

See "Costing Scenario" on page 15 for a list of procedures and functions.

Request for Quotes (RFQ)

5

Overview

Requesting vendor quotes can be a complex and difficult process. Source makes it easier by drawing product cost information already entered and allowing you to choose if business partners can access your material and labour costs.

By keeping the quote process linked to the products, you ensure that everyone is dealing with the same, most up to date information. Conversations and notes around quotes are in one place, avoiding data reentry, and saving time and error.

Requests for Quotes (RFQ) allows you to request cost quotes directly to your business partners. Using the existing product information, you can define your cost needs such as sizing, colors, and deliveries, as well as specify the desired currency for quotes.

Your business partners will receive a notification with a link towards the product in Source, allowing them to enter their quote information directly on the request created. This ensures that all of your cost and quote information remains together in one place and avoid data duplication.

Since your request details are saved as a Cost Scenario when requesting quotes, you may then compare internal, reference and external quotes on the Costing Scenario Comparison page. See "Viewing the Cost Scenario Comparison Page" on page 22.

Browsing the Structure

1 From the Home page, click the Product Structure tab to open the Full Structure window.

All the Season/Years in your hierarchy that you have access to are listed. Folders with sub-folders appear with +.

Tip: You may also search for RFQs using the quick search feature. See "Searching for Items" on page 9.

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a product folder from the list.

All Requests for Quotes within the selected folder are listed the most recently modified appearing first.

Tip: You may sort RFQ lists. See "Sorting Lists" on page 9.

Viewing an RFQ

1. From the RFQ landing page, or from a product folder, click the RFQ Name link.

   The Costing Request Details page opens. The Costing Type section is locked and read only.
2. You may edit certain fields of the Costing Request section.

   See "Adding Costing Request Information" on page 28.
3. Click the Scenario name link to view the Costing Scenario details.

Printing an RFQ Page

1. From any RFQ page, click the Printer icon.

   A printer friendly version of the page opens in a new window.
2. Click Print Preview to preview the print layout.
3. Click Page Setup to select your print options and Print.
4. Close the Print window.

Working with RFQs

See "Request for Quotes (RFQ)" on page 24 for a list of procedures and functions.

Vendor Management

6

Overview

When seeking new business partners, companies today need to take many aspects into consideration. Vendor Management allows you to track your vendor capabilities, capacity for development, compliance, performance, and inspection reports. Using indexes to calculate ratings, you can make more informed decisions for sourcing plans and cost requests.

A major part of Global Sourcing is the ability to choose a vendor who not only can manufacture the required product in the correct quality, quantity, cost and delivery period but that also complies with your ethical and technical requirements.

Vendor Management allows for a vendor to self certify themselves against Capability, Capacity and Compliance while allowing the you to monitor, inspect and rate a particular vendor against the same criteria, capturing their performance across this period/season and allowing for previous periods/seasons to be considered.

The Vendor Management landing page lists recently modified vendors. Notice that the Working Folders navigational bar is named My Working Vendors in the Vendor Management tab.

You can access vendor information using the links in the Recent Changes section, click the vendor location in your Favorites (My Working Vendors), or use the Vendor List to navigate to the vendor folder.

Selecting Shortcuts

From the Vendor Management landing page, click the Company Name link for Vendors in the Vendor Management- Recent Changes section to open the vendor.

Accessing Working Vendors

From the Vendor Management landing page, select the desired folder from the My Working Vendors section. The Vendor Overview or Detail page opens.

Browsing the Vendor List

1 From the Home page, click the Vendor List tab to open the Full Structure window.

All the Vendors that you have access to are listed. Folders with sub-folders appear with +.

Tip: You may also search for vendors using the quick search feature. See "Searching for Items" on page 9.

2 Navigate the folder structure by clicking the + to open any sub-folders.
3 Select a Vendor or Location from the list.

The Vendor Overview page opens with all Locations listed.

Tip: If you select a Vendor Location, the Vendor Details page for the location opens. You may click the Vendor Name link to open the Overview page.

4 Click the Location Name link to view the Vendor Details page.

Adding a Vendor to the Working Vendors

From the Vendor Overview page, click **Action > Add to My Working Vendors**. The vendor appears in the My Working Vendors list.

Removing a Vendor from the Working Vendors

From the Vendor Overview page, click **Action > Remove Vendor From My Working Vendors**. The vendor is removed from the My Working Vendors list.

Viewing Vendor Information

1 From the Vendor Management landing page, or from a product folder, click the Company Name link.

The Vendor Overview page opens.

Tip: If you select a Vendor Location, the Vendor Details page for the location opens. You may click the Vendor Name link to open the Overview page.

2 Click the Location Name link to view the Vendor Details page.
3 Click Contact Info to view and add Contact Information for the vendor.

See "Contact Information" on page 50.

4 Click Capabilities to view and add Capability information for the vendor.

See "Capabilities" on page 52.

5 Click Capacity to view and add Capacity levels for the vendor.

See "Capacity" on page 53.

6 Click Compliance to view and add Compliance information for the vendor.

See "Compliance" on page 54.

7 Click Performance to view and add Performance information for the vendor.

See "Performance" on page 56.

8 Click Inspection to schedule and view Inspection reports for the vendor.

See "Inspection" on page 57.

9 Click History to view the vendor's History.

See "Vendor History" on page 61.

Viewing Relationships for a Vendor

1 From the Vendor Overview page, click the Relationship tab.

The Relationship page opens. Locations added for the vendor are listed in the Vendor Locations, while associations with other Vendors are listed in the Business Partner Relationships section.

2 You may add or remove relationships.

See "Adding Relationships between Vendors" on page 49 or "Removing Relationships between Vendors" on page 50.

Adding Relationships between Vendors

1 From the Relationship page of a vendor, click **Action > Add Relationship (From List)**.

The Full Structure window opens with all vendors listed.

-or-

You can add a Vendor by searching for it. **Click Action > Add Relationship (Search)**.

See "Searching and Adding a Manufacturer" on page 38 for steps.

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a Vendor or Location from the list.

The Location(s) appears in the Locations or Business Partner section.

Note: If you select a Vendor, all associated Locations are automatically added. If you select a Vendor Location, only the location is added. Locations are added to the Business Partner section if the vendor selected is a different company.

4 Add information for each added location:

a Select a Relationship from the list.

b Click the PO Recipient check box if this vendor can receive Purchase Orders fro processing.

c Click the Manufacturer Recipient check box if this vendor can receive parts and materials for manufacturing.

5 Click Save.

Removing Relationships between Vendors

1 From the Relationship page of a vendor, select the Location you want to remove.

2 Click **Action > Remove Relationship**.

The page is refreshed and the Vendor Location is removed.

3 Click Save.

Printing a Vendor Management Page

1 From any Vendor Management page, click the Printer icon.

A printer friendly version of the page opens in a new window.

2 Click Print Preview to preview the print layout.

3 Click Page Setup to select your print options and Print.

4 Close the Print window.

Contact Information

A Business Partner's contact information allows you to define the contacts you work with, their departments, and how to reach them.

You can add and remove contacts as well as edit their information. When adding contacts, you can select the Business Partner users. The primary contact entered will automatically be selected for internal Inspections.

Viewing a Vendor's Contact Information

From the Vendor Location Details page, click Contact Info in the left pane. The Contact Info page opens.

Adding Contact Information

1 On the Contact Info page, the Contact Header pulls from the Location Home page and is locked and read-only.

Any contacts for the company are displayed. You may modify the contact's information.

2 Add or remove contacts for this location.

See "Adding a Contact" on page 51 or "Deleting a Contact" on page 52.

3 Click Save.

Adding a Contact

1 From the Contact Info page, click **Action > Add Contact**.

A contact section is added to the page.

2 Select the Contact Type from the list.

3 Type the Location's Address in the fields provided:

- Address 1 and 2
- City

4 Enter the Contact Name in the field.

This field is required.

Tip: You may also add users associated to this Business Partner. See "Adding a Business Partner Contact" on page 51.

5 Enter the email address in the Contact Email field.

6 Select a Region from the list.

The associated Countries are filtered.

7 Select a Country from the list.

8 Enter the Department of the contact.

9 Type the Zip/Postal Code in the field.

10 Enter the Fax No and Telephone number in the fields.

11 Provide additional contact information as needed in the provided fields.

Note: Additional fields are system-defined and can be configured in the Administration module. See the Fashion PLM Administration online help for details.

12 Click Save.

Adding a Business Partner Contact

1 From the Contact Info page, click the BP Users link.

The Full Structure window opens.

2 Navigate the folder structure by clicking the + to open any sub-folders.

3 Select a Vendor Location from the list.

The associates users for the location appear.

4 Click the option button for the desired user and click Select.

The Contact is added to the location and available contact information for the user is automatically pre-filled in the fields.

5 Click Save.

Deleting a Contact

1 From the Contact Info page, select the check box of the contact you want to remove.

2 Click **Action > Delete Contact**.

The page is refreshed and the contact is removed.

3 Click Save.

Capabilities

The Capabilities page allows you to capture a vendor's capabilities for the following areas:

- Product Types
- Category
- Fabric Used
- Sewing
- Pressing
- Wet Processing
- In-house Testing
- Quality Assurance
- Spreading

This page may be filled by the vendor and selected Product Types and Categories will be listed on the Capacity page allowing you to enter maximum capacity for each Product Type and Category.

Viewing the Vendor Capabilities

1 From the Vendor Location Details page, click Capability in the left pane.

The Capability page opens.

2 View all Capabilities sections by clicking the + to open and display section content.

Adding Capability Information

1. From the Capability page, click the check boxes that apply for the vendor for all sections.
2. Click Save.

Selecting a Template

1. From the Capability page, click **Action > Select Template**.

   The Select Template window opens.
2. Select the desired template and click Save.

   All associated capabilities are added to the page.
3. Click Save.

Viewing Inspection Results

From the Capability page, click **View > View Inspection**. Inspection columns are added to the page. The Inspection view is locked and read only.

Tip: You may click **Action > Hide Inspection** to hide the inspection view and edit the page.

Capacity

The Capacity page is linked to the Capabilities page. In order to enter minimums and maximum numbers, you will need to first define Capabilities for the vendor.

Selected Capabilities are listed and you may enter capacity information by Month, Year, Standard Hours or Days. For each Product Type and Category, you can enter amounts for Basic, Fashion, and Other items. The Total Capacity is auto-calculated.

When reserving Capacity, you cannot reserve more than the vendor is capable of producing. The Total Allocated amount is auto-calculated from the sum of units entered by month (year, day, hours), and the Unallocated amount is the balance of the vendor's capacity after the Allocated units have been subtracted.

Viewing the Vendor Capacity

From the Vendor Location Details page, click Capacity in the left pane. The Capacity page opens.

Adding Capacity Information

1. From the Capacity page, type the Minimum Order in the field.

2 Select the Capacity in Units from the list.

3 For each Product Type and Category listed:

- Type the maximum number of Basic items this vendor can manufacture.
- Type the maximum number of Fashion items this vendor can manufacture.
- Type the maximum number of Other type items this vendor can manufacture.

4 Click Save.

The Totals are auto-calculated. The Total Capacity is pre-filled.

Reserving Capacity

1 From the Capacity page, click **Action > Reserve Capacity**.

The Reserve Capacity page opens.

2 Select whether this reserved capacity falls under an Agreement with the vendor or Master company by selecting the Vendor Agreement or Master Co Agreement check boxes.

3 The Total Capacity identifies the maximum amount of items that can be reserved for a Product Type/ Capacity per month.

4 Enter the amount of items your want to reserve for all select Product Type/Capacity per month.

5 Click Save.

The Total Allocated and Unallocated reserves are auto-calculated.

Viewing Reserved Capacity by Location

From the Capacity page, click **Action > All Locations**. The Reserved Capacity for all Locations page opens.

Tip: The page is locked and in read-only format, but you may print it. See "Printing a Vendor Management Page" on page 50.

Compliance

The Compliance section consists of questionnaires that are set up in the Administration module. You may setup two types of forms:

- Social Compliance
- Technical Compliance

Vendors are responsible for filling in the Compliance forms. Mandatory items are highlighted and vendors cannot save the form unless all mandatory items have been completed.

Once a questionnaire is saved, a record is added to the Vendor History with the User Name, Time And Date of the submitted form.

To calculate the percentages for each capability, you must add a template. Templates are set up in the Administration module and each section is weighted by the percentages entered on the VM templates. See the Fashion PLM Administration online help for details.

When inspecting a Vendor Location, inspectors use the same criteria that the vendor submitted. You can then compare the Inspected Compliance values with the Vendor's values.

Viewing the Vendor Compliance

1 From the Vendor Location Details page, click Compliance in the left pane.

The Social Compliance page opens.

2 Click the Technical Compliance tab to view the questionnaire.

Adding Compliance Information

1 From the Social Compliance page, click the Yes or No check boxes that apply for each question.

Note: Questions highlighted in yellow are required and must be selected to save the page.

2 Click Save.

3 Repeat these steps for the Technical Compliance page.

Selecting a Template

1 From the Compliance page, click **Action > Select Template**.

The Select Template window opens.

2 Select the desired template and click Save.

The Capability Index is calculated based on the selected Capabilities and the percentage value of each section.

3 Click Save.

Viewing Inspection Results

From the Compliance page, click **View > View Inspection**. Inspection columns are added to the page. The Inspection view is locked and read only.

Tip: You may click **View > Hide Inspection** to hide the inspection view and edit the page.

Performance

The Vendor Management Overview page displays the current period information and the various performance Indexes generated for Capability, Compliance, Performance, and Inspection. The different Inspection Types as well as a subjective rating with Comments provided by the Master Company are also displayed.

The weighting and items that generate the indexes are defined in the Master Company Administration for the section (Compliance, Quality, Inspection).

Index Type	Generated By
Compliance Index	Generated by the fields ticked by the Vendor. Weighting of the fields and sections determines the Index with the weighting being defined in Administration by the Master Company.
Capabilities Index	Generated by the fields ticked by the Vendor. Weighting of the fields and sections determines the Index with the weighting being defined in Administration by the Master Company.
Performance Index	Generated as a ratio of the 4 Performance Ratings values that have been entered by the Master Company. Straight 1-10 value for each rating converted to a percentage. An entry is made in the Performance History log when saved.
Inspection Index	Generated from the results obtained by the Inspection Company. A separate set of entries (Last Inspection, Inspection Expiry, Inspection Type and Inspection Index) is maintained for each Inspection Type.

Viewing the Vendor Performance

1 From the Vendor Location Details page, click Performance in the left pane.

The Performance page opens.

2 Click the History tab to view the Performance History for the vendor.

Adding Performance Information

1 From the Current Performance page, enter Performance Rating details:

- **a** Type a Quality Rating in the field.
- **b** Type a Delivery Rating in the field.
- **c** Type a Price Rating in the field.
- **d** Type a Response Rating in the field.

Tip: The General Information section is locked and read-only.

2 Enter any Comments on this vendor's performance in the Comments field.

3 Add Attachments if needed.

See "Adding Attachments" on page 13.

4 Click Save.

The Performance Index is auto-calculated.

Inspection

The Inspection page displays the list of inspections scheduled and completed for this Vendor/Location as well as the contact information for the Inspection Company to be used for a specific type of Inspection.

Inspection Period sets the date of the next inspection based on the date of the last inspection. It is a drop down field defined in the Administration - typical values are 3 months, 6 months, 12 months, 18 months, and 24 months.

A separate section is maintained for the Vendor and Inspection company information with a table for the different Inspection types and the notification options.

You can schedule an inspection to be carried out at a specific frequency. The Inspection company specified is notified of the request via email with the Inspection forms.

Once you have selected an inspection company and scheduled and Inspection, a link is added to the Inspection list allowing you to access the Inspection results.

When the Frequency field is entered upon scheduling an Inspection, an Inspection is automatically scheduled for the date (3 months, 12 months, etc.). The Reminder Email is automatically sent out according to the defined Reminder Duration.

After the inspection is complete, you can view and compare the inspection submitted by the Vendor to the one completed by the Inspection Company.

Viewing the Vendor Inspections

1 From the Vendor Location Details page, click Inspections in the left pane.

The Inspection page opens.

2 Click the Inspection ID link to view the inspection details.

The Overview page opens.

Note: Depending on the type of Inspection scheduled, the Overview page and tabs available will be different.

3 Use the available tabs to view the inspections results.

Scheduling an Inspection

1 From the Inspection page, select the Vendor Inspection check box of the company that is responsible for the inspection.

Tip: You may need to add a Vendor company first. See "Adding an Inspection Company" on page 59.

2 Click **Action > Schedule Inspection**.

The Schedule Inspection window opens.

3 Add the following information:

- **Inspection Type**: Can be one of Capability, Capacity, Compliance or Production.
- **Frequency**: The period that the inspection is valid for before another inspection is required.
- **Internal Contact**: Selected master company user that should be notified. See "Selecting Master Company Users" on page 58.
- **Prior Notification**: The time period that the Vendor is notified about the scheduled Inspection.
- **Completion Reminder**: Check box to send an email to the Vendor and Internal contact to remind them of the Inspection date.
- **Reminder Duration**: The time period prior to the Inspection that the Completion Reminder is sent.
- **Additional Time**: Addition time period given to the Vendor to complete the Inspection if not completed by the due date.
- **Non-Completion Action**: Action taken to the Vendor Status if the Inspection has not been completed by the Additional Time.

4 Click Save.

The inspection is scheduled and appears in the Scheduled Inspections list.

Selecting Master Company Users

1 From the Schedule Inspection window, click the MC Users link.

The Full Structure opens with all master company location listed.

2 Select a location to view all users for the location.

3 Select a user name in the list.

The user is added.

Editing a Scheduled Inspection

1 From the Inspection page, select a Scheduled Inspection from the list.

2 Click **Action > Edit Scheduled Inspection**.

The Scheduled Inspection window opens.

3 Modify the Inspection information.

See "Scheduling an Inspection" on page 58.

Note: Some fields are locked and read-only.

4 Click Save.

The inspection is modified.

Cancelling an Inspection

1 From the Inspection page, select a Scheduled Inspection from the list.

2 Click **Action > Cancel Scheduled Inspection**.

A confirmation message appears.

3 Click OK.

The inspection is cancelled and listed in the Cancelled Inspections list.

Cancelling an inspection automatically archives the vendor details on the Vendor History page.

Adding an Inspection Company

1 From the Inspection page, click **Action > Add an Inspection Company**.

The Full Structure window opens.

2 Click + to open sub folders and navigate to the desired business partner.

Note: Only Business Partners of the type Inspection Company are available to be selected. These are set up in the Administration module. See the Fashion PLM Administration online help for details.

3 Select a location from the list.

The Inspection Company is added to the Inspection page.

4 You may enter any information missing for the Inspection company.

The Main Contact name and Email are required fields.

5 Click Save.

Removing an Inspection Company

1 From the Inspection page, select the check box of the Inspection Company you want to remove.

2 Click **Action > Remove Inspection Company**.

The inspection company is removed.

3 Click Save.

Adding Inspection Results

1 From the Inspection page, click the Inspection ID.

The Inspection Overview page opens.

Note: Depending on the type of Inspection scheduled, the Overview page and tabs available will be different.

2 Click the Capability tab to add Capability inspection results.

See "Capabilities" on page 52.

3 Click the Capabilities/Capacity tab to add Capacity inspection results.

See "Capacity" on page 53.

4 Click the Compliance tab to add Social and Technical Compliance inspection results.

See "Compliance" on page 54.

5 Click the Performance tab to add performance ratings as per the inspection.

See "Performance" on page 56.

6 Click the Overview tab to view a summary of the inspection results.

7 You may need to click + to open the details the inspection type.

8 Select a Result from the list(s).

9 For Compliance inspections, type the Index in the field.

10 Select the overall Inspection Result from the list.

Once you save the page, the vendor details wil be archived on the Vendor History page.

11 You may type Inspection Comments in the field.

12 The master company may also enter comments in the Master Company Comments field.

13 Click Save.

The inspection results may be compared with the information submitted by the business partner. See "Comparing Inspection Results" on page 61.

Scheduling an Automatic Inspection

1 From the Inspection page, select the Vendor Inspection check box of the company that is responsible for the inspection.

  Tip: You may need to add a Vendor company first. See "Adding an Inspection Company" on page 59.

2 Click **Action > Schedule Automatic Inspection**.

  The Schedule Automatic Inspection window opens.

3 Add Inspection details.

  See "Scheduling an Inspection" on page 58.

4 Click Save.

  The inspection is schedule and is added to the Scheduled Inspections list.

Selecting a Template

1 From the Inspection page, click **Action > Select Template**.

  The Select Template window opens.

2 Select the desired template and click Save.

Inspection templates lists the series of questions that you want to check and are set up in the Administration module.

Comparing Inspection Results

From the Inspection page, click **View > View Inspection**. The last inspection's data appear on the page.

Tip: To view the details of a previous inspection, click the inspection History link.

Vendor History

The Vendor History page lists all changes to the Vendor Management section. An archive section for attached files or inspection data is also available.

Each section contains the User Name, Update Time and Status for all modifications.

When an Inspection is completed, a snapshot on the complete vendor details is archived in the Vendor Archive section.

Viewing the Vendor History

1 From the Vendor Location Details page, click History in the left pane.

The Inspection History page opens.

2 You may click the Archive Name in the Archived Vendor section to view the vendor details at the time of the inspection.

The vendor information opens in read-only format in a separate window.

Restoring Attachments

1 From the History page, select the version of the archived attachment you want to restore.

2 Click **Action > Restore Attachment**.

A confirmation appears.

3 Click OK.

The current attachment version is archived and the selected version is restored.

Comments

7

Overview

In the Costing process, various comments may come up. Communication of these comments typically is unlinked to the development itself. Source Comments allow you to track comments linked to Sourcing, Costing, Vendor Management as well as General comments.

Since you need a way to communicate with your Business Partners around the sourcing and costing process, Comments are meant to act as emails and messages relating to various aspects of Source. In order to provide ease of navigation, Comments can be added at various levels.

You may create a Comment from most Product, Source Plans, and Costing Scenario pages. You may also add General Comments that relate to no specific product, plan, scenario, or vendor.

All comment types can be accessed from the main Comments tab. The Comments tab displays an overview of comments created or responded to in the last three days separated into three sections-Sourcing Comments, Costing Comments, Vendor Management Comments and General Comments. The comments in each list appear in descending order from the most recent Last Updated, and the lists may be sorted from each column header.

Depending on if the comments is launched from a product, plan, scenario, or vendor page or from the comment tab, an email with links to the page is created. The recipients can simply click the link to open the specific page. If they are not logged into the system, the system will open to the Source login page.

Viewing Comments

1 Click the Comments tab.

The All Comments page opens. The most recent comments appear at the top of the list.

2 Click + to see the embedded replies to a Comment.

Tip: You can also click Expand/Collapse All to view or hide sub-replies.

3 Click a Comment's Subject link to open the Comments page with the comment's details and all previous comments (if there is a chain) in a read-only view.

Note: Only users with access to the Comment will be able to view it. Users with no access will remain on the Comments tab.

4 Click the Return to All Comments link to return to the comments list.

Sorting the Comment List

1 Click the column header to sort the list in ascending order by the selected column.
2 Click the same header again to sort the list in descending order.
3 Click a different column header to sort by a different column in ascending order.

Tip: You can also sort the Comments list by various available views. See the View menu for options.

Replying to an Existing Comment

1 Click the Reply link on a comment in the Comments list.
  The Reply to Comment page opens.
2 Select users to whom you are sending this reply.
  See "Selecting Users for the To, Cc and Bcc Fields" on page 65.
3 Enter a Subject for this comment.
  This field is required. The Subject field automatically defaults to RE: before the comment subject.
4 Select a Priority from the list.
  The Priority defaults to Normal.
5 Type in a reply in the Comments field.
6 Add attachments.
  See "Adding Attachments to a Comment" on page 66 for details.
7 Click Post.
  The page refreshes and your reply appears in the Comments Details where the most recent replies appear at the top of the list.

Creating New Comments

1 From the Comment Overview page, click **Action > New**.
  The New Comments page opens.
2 Select users to whom you are sending this reply.
  See "Selecting Users for the To, Cc and Bcc Fields" on page 98
3 Enter a Subject for this comment.
  This field is required.
4 Select a Type from the list.
5 Select a Priority from the list.

The Priority defaults to Normal.

6 Select a Tab from the list.

7 Select a Status from the list.

8 Type in a comment in the Comments field.

9 You may add Attachments.

See "Adding Attachments to a Comment" on page 66 for details.

10 Click Post.

The page refreshes and your reply appears below the appropriate Comments section. The most recent comments appear at the top of the list.

Selecting Users for the To, Cc and Bcc Fields

1 From a Comment page, click To.

The Send Comment To window opens.

Tip: You may also type a recipient's email address in the To, Cc, and Bcc fields.

2 Select a Filter option button.

The page refreshes with the appropriate Unassigned Users list.

3 Select a Company from the list.

The Locations list is filtered with users for the selected Company. See the following table for a list of filters and what they control.

Filter Name	Description
Team with Access to item	All users from Master Company with access to the item folder are listed in the Unassigned Users list. Select which users will receive the comment.
Office Location for the item	All users from selected Office (Ownership) for the selected item are listed in the Unassigned Users list. Select which users will receive the comment.
Business Partners for item	All locations and users from selected Business partners (Ownership) for the selected item regardless of access (release). Select the Company from the list. This filters the Locations. Select a Location from the list. This filters the Unassigned Users list. Select which users will receive the comment.

Filter Name	Description
Users and Business Partners with access to the item	Only locations and users from selected Business partners (Ownership) for the selected item that have the item released to them. Select the Company from the list. This filters the Locations. Select a Location from the list. This filters the Unassigned Users list. Select which users will receive the comment.
All Users and Business Partners	Select the Company from the list. This filters the Locations. Select a Location from the list. This filters the Unassigned Users list. Select which users will receive the comment.

The Company and Locations list are available with the following options: Business Partners for item, Users and business partners with access to item, and All users and business partners.

4 Select a Location from the list.

The Unassigned Users list is filtered for all Users assigned to the selected Location who meet the selected filter.

5 Select a user from the Unassigned Users list and click > Assigned Users list.

6 Click Add.

7 Repeat for all users.

8 Click Cc and repeat steps 2 to 6 for users who should be copied on this comment.

9 Click Bcc and repeat steps 2 to 6 for users who should be blind copied on this comment.

10 Click the Close Window link to return to the Comment.

Adding Attachments to a Comment

1 From any New Comments page, click the Update Attachment link.

The Attachment List window opens.

2 Click Browse to navigate to your folder and select the desired file.

3 Click Open.

The file path appears in the Browse field.

4 Click Attach.

The file appears in the Attachments list.

5 Repeat steps 2 to 4 for all desired files.

6 Click Save.

7 Click the Close Window link to exit the Attachment List window.

The page is refreshed with the added file(s) in the attachments section.