



TEAMCENTER

Supplier Connect for Data Exchange

Teamcenter 2412

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1. About exchanging data with suppliers in Supplier Connect

Effective communication and frequent interaction between the OEMs and suppliers are critical. For product design, the Supplier Connect solution from Teamcenter enables and automates this interaction in a secure and traceable way. Specifically, development teams working on large products in various industries, such as the automotive, electronics, or machinery industry, can collaborate with suppliers, using data exchange packages.

As a design engineer, you need to share design data with a supplier and receive updated designs from the suppliers based on the requirements. In Teamcenter, you can create a package with the items or assemblies that require design updates. This package can include the product structure, visualization files, ad hoc information, and other files. While creating the package, you assign the suppliers and provide modification access for the suppliers. When you share this package with the assigned suppliers, they receive an email to access the package. The suppliers can open the package in their Teamcenter, modify the assemblies or parts based on the requirements specified in the package, and submit their responses to the assigned tasks.

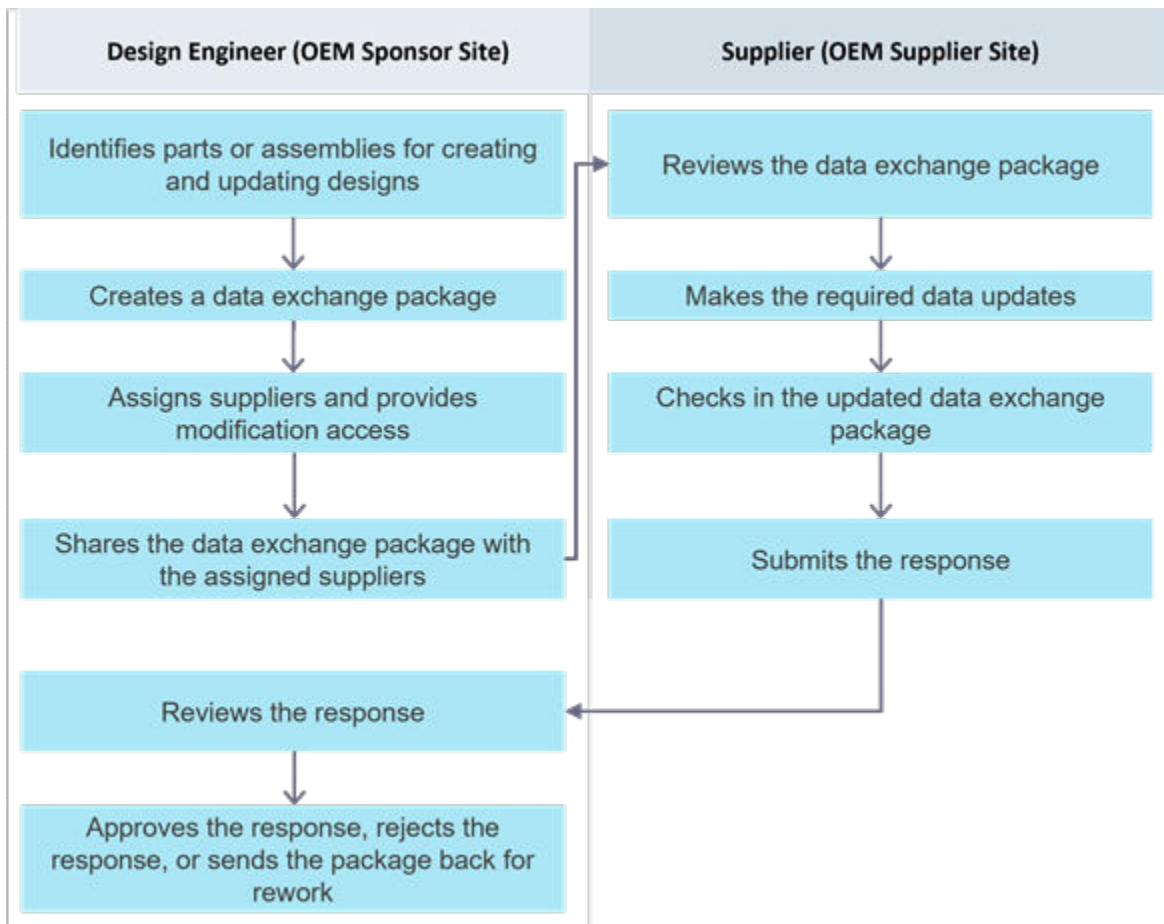
You review these responses and approve them if the design updates are satisfactory. When approved, the updated designs are imported into your Teamcenter. If you reject the design updates, the suppliers can rework on the requests in their Teamcenter and share updated designs for review and approval.

Where do I go from here?

 Administrator	See <i>Supplier Connect — Deployment and Administration</i> .
 Supplier	See <i>Supplier Connect for Suppliers</i> .
 Sponsor	
How can I share data with my suppliers?	Create a Supplier Connect data exchange package.
When a supplier has submitted a response to me, what should I do?	Review the supplier's response, share an interim update with a supplier, and approve or reject a supplier's response or send for rework.

2. Business process for exchanging data with suppliers

The following graphic shows the sequence of tasks required to exchange data with suppliers:



3. Data exchange scenarios

Data exchange scenarios in Supplier Connect

There are different ways in which design collaboration happens in Teamcenter between the OEMs and the suppliers.

- One-way exchange of data, where only reference designs for standard parts are shared with the suppliers so that they can begin manufacturing.
- Round-trip exchange of data, where you can collaborate on designs with the suppliers throughout the business process.

Sharing reference designs with suppliers in Supplier Connect

Overview

As a sponsor, you can exchange design data in Teamcenter with suppliers solely for reference purposes. These are outbound exchanges so that the suppliers can start manufacturing the parts based on the designs. Through this process, it is important that the suppliers always have the correct, updated version of the design documents.

Scenario

You are manufacturing the Nanobox, a compact and flexible embedded industrial PC. Your company decides to procure a new connector for the Nanobox to meet the business requirements. You choose a supplier named Goodparts to build the new connector. The connector designs are final, and the parts are ready to be manufactured. The CAD files and other reference data for the connector are shared with the supplier, based on which they manufacture the parts.

The process of sharing reference designs

Create a Supplier Connect data exchange package with ready-to-manufacture designs and send it to the suppliers so that they can start manufacturing parts based on the designs.

Data exchange with non-CAD files

Overview

In the following scenario, JT reference data is shared with the suppliers along with the requirements specification document. Suppliers can access this data and work on the data exchange package. The response is sent back to Teamcenter for approval. This is an example of a round-trip exchange of designs (JT and specifications) from the OEM (sponsor) to the supplier and back.

Scenario

You are manufacturing the Nanobox, a compact and flexible embedded industrial PC. In order to meet business requirements, you procure a new hard disk and additional connectors for the Nanobox. As a result, the existing housing designs cannot be used for the Nanobox. You choose a company called Bestparts to source these parts from. Bestparts (the supplier) updates the existing designs and manufactures the new housing.

To start the process, you share the requirements specifications document for the new housing to Bestparts along with the JT drawings of the existing housing for reference purposes. In response, you expect a design specifications document for the housing from Bestparts.

Process steps for a round trip exchange of non-CAD files

1. *Create a Supplier Connect data exchange package.*
2. *Review the supplier's response.*
3. *Approve or reject the new housing designs.*

Data exchange for modifying CAD data

Overview

For working on designs, the CAD files and reference data are often shared with the suppliers, using a Briefcase. Suppliers can access the data using Briefcase Browser and work on the designs. The updated designs are sent back to the OEM for approval by creating a new Briefcase. This is an example of a complete round-trip exchange of a Briefcase containing CAD designs from the OEM to the suppliers and back.

Scenario

You are manufacturing the Nanobox, a compact and flexible embedded industrial PC. Your company decides to procure a new hard disk to meet the business requirements, which in turn necessitates upgrading the existing housing design of the Nanobox. You choose a supplier named Bestparts to design as well as build the new housing. The CAD files and other reference data of the existing housing are shared with the supplier in a Briefcase, based on which they modify the designs. The supplier sends the updated housing designs in a new Briefcase, and you can review these designs in Teamcenter.

High-level process for a round-trip exchange of CAD files

1. *Create a Supplier Connect data exchange package.*
2. *Review the supplier's response.*
3. *Approve or reject the new housing designs.*

4. Create a Supplier Connect data exchange package

Create a Supplier Connect data exchange package by adding the item or assembly that you want to share with your suppliers for design updates or for reference. Additionally, specify the modification rights or transfer ownership to the assigned suppliers so that they can make the required design updates. You can share the item or assembly as **Live Data**, **Briefcase**, or **Teamcenter Briefcase**. The suppliers access the data exchange package, review the requirements, make the required updates, and share the updated versions of the item or assembly or upload an updated Briefcase for review and approval.

Create **Live Data** or **Briefcase** data exchange packages for suppliers who do not have their own Teamcenter. You can also include datasets in a **Live Data** data exchange package. The suppliers log on to the OEM Supplier Site, work on the package, and submit a response from this site. Create a **Teamcenter Briefcase** data exchange package for suppliers who have their own Teamcenter setup. This gives them the additional capabilities of creating and updating designs in their own Teamcenter instance. These suppliers download the Briefcase, import it into their Teamcenter, make the required updates, export the Briefcase from their Teamcenter, upload the updated Briefcase from the OEM Supplier Site, and submit a response from this site.

Note:

You can also create a data exchange package for an item or assembly with an ADA license and share it with suppliers who have the appropriate access level defined in the license. For such items or assemblies, when you assign a supplier, the ADA licenses assigned to the items, assemblies, and the supplier is evaluated. If a supplier matches the access level defined in the license, the supplier appears in the search results. When a supplier views the data exchange package in their Teamcenter, they can view only the accessible components of an assembly.

In some scenarios, for example, when the supplier has worked on the product earlier, and they know which parts need to be updated to meet your business requirements. In such cases, you want the supplier to specify which parts they intend to update in an assembly. To get this information from the suppliers, create a data exchange package with the required item or assembly for reference. Do not provide modification access. When the supplier views the item or assembly at their site, they can select the required item or parts in the assembly and request modification access through a *Self Service* package.

Prerequisites

Ensure that the suppliers have the following software installed:

- Briefcase Browser to modify the JT or CAD data and send a return Briefcase
- Briefcase Browser to update NX data

- Briefcase Browser Plugin for CATIA to update CATIA data

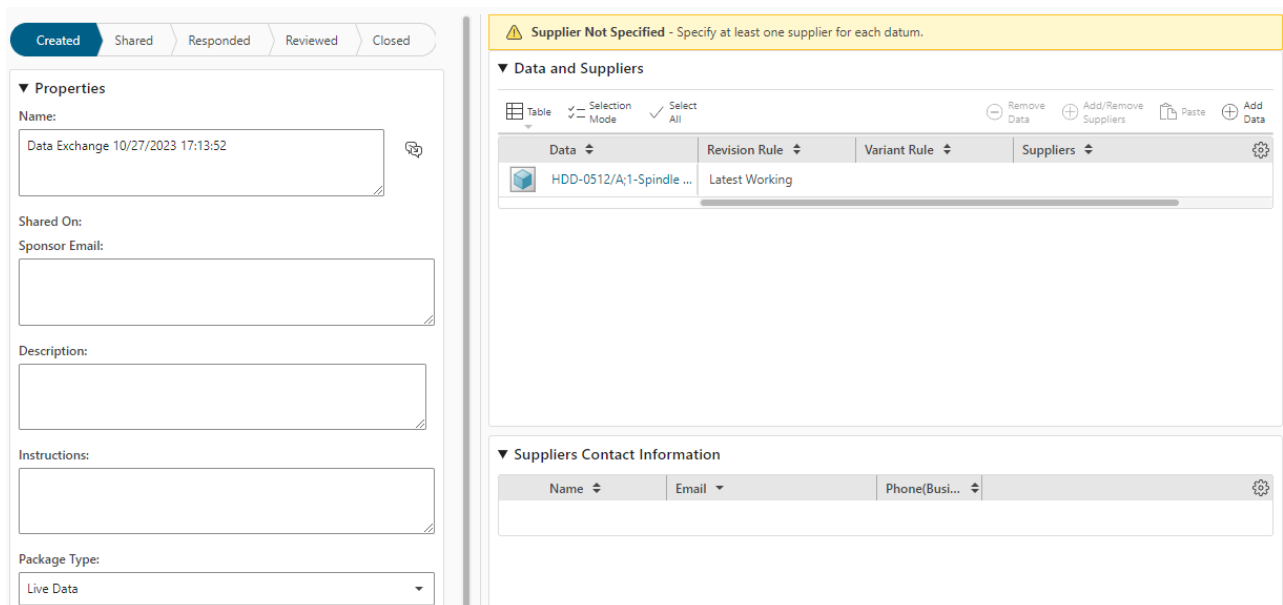
Procedure

1. Select the required item or assembly.

If you are creating a **Live Data** data exchange package, you can also include datasets in the package.

If you are selecting an item or an assembly with an attachment, ensure that you have added the attachment with the relation configured in the **MultiSiteExpOptSet** transfer option set.

2. Choose **More Commands** ... > **Share**  > **Share with Suppliers** .
3. Provide a package **Name**, **Description**, and **Instructions** for the suppliers.





The screenshot displays the 'Supplier Connect' configuration interface. On the left, the 'Properties' panel includes a 'Name' field with the value 'Data Exchange 10/27/2023 17:13:52', a 'Sponsor Email' field, a 'Description' field, an 'Instructions' field, and a 'Package Type' dropdown menu set to 'Live Data'. On the right, the 'Data and Suppliers' panel features a table with columns for 'Data', 'Revision Rule', 'Variant Rule', and 'Suppliers'. A yellow warning banner at the top of this panel states 'Supplier Not Specified - Specify at least one supplier for each datum.' Below the table is the 'Suppliers Contact Information' section with fields for 'Name', 'Email', and 'Phone(Busi...)'.

4. Type the email address of the sponsor in the **Sponsor Email** box.


In this case, the sponsor is the design engineer who creates the data exchange package.

5. From the **Package Type** list, select the type of package to send to suppliers.
 - Select **Briefcase** to share product structures with JT or CAD data.
 - Select **Live Data** to share Teamcenter data such as *items* and *datasets*. The datasets can be documents, PDFs, images, and so on.

- Select **Teamcenter Briefcase** to share a managed Briefcase of a product structure with CAD data to suppliers who have their own Teamcenter instance.
6. If you select **Briefcase** or **Teamcenter Briefcase** as the **Package Type**, do the following additional actions:
 - a. From the **Export Option Set** list, select the required export option set to export the Briefcase to the OEM Supplier Site.
 - b. From the **Import Option Set** list, select the required import option set to import the supplier's Briefcase into Teamcenter.
 7. Choose **More Commands** **...** > **Edit**  > **Save Edits** .

Note:



If you have included datasets while creating the package and you change the **Package Type** from **Live Data** to **Briefcase** or **Teamcenter Briefcase**, the datasets are removed from the package. This occurs because you can share datasets only in a **Live Data** package.

8. (Optional) In the **Data and Suppliers** section, search for and add multiple items to the package.
 - a. In the right pane, click **Add** .

For **Live Data** packages, you can add items and datasets.

 - b. In the **Add** panel, select the type of item or dataset, and specify the required information to create it.

OR

Use the **Palette** tab or the **Search** tab to locate the required items or datasets.
 - c. Select the required items or datasets, and then click **Add**.
 - d. To remove an item or dataset, select it and click **Remove** .
9. Assign suppliers to the package as follows:
 - a. In the **Data and Suppliers** section, select the required item or dataset, and click **Add/Remove Suppliers** .

Note:

If you create a data exchange package for an item or assembly with an ADA license, the **ADA Enabled** column displays **Yes** ✓ for the item or assembly in the **Access Management** tab of the package. For such items or assemblies, when you search for a supplier, Supplier Connect evaluates the ADA license assigned to the items, assemblies, and the supplier. If a supplier matches the access level defined in the license, the supplier appears in the search results.

If a supplier does not have access to the selected item or assembly, a red cross ✗ appears next to the selected item or assembly. When a supplier views the data exchange package in the OEM Supplier Site, the supplier can view only the accessible components of an assembly.

- b. In the **Add/Remove Suppliers** panel, specify the search criteria for the required suppliers, and click **Search** to search for a supplier.

Note:

To send **Briefcase** or **Teamcenter Briefcase** data exchange packages to suppliers, the assigned suppliers must have the **Briefcase Browser Participant Level** property set to one of the following values:

- **NX** to assign a Briefcase Browser license to the supplier.

Suppliers require this license to download any Briefcase associated with the event, review the contents of the Briefcase, modify part designs in Briefcase Browser, and upload a new Briefcase with updated designs.

- **CATIA** to assign a Briefcase Browser license and a Briefcase Browser plugin for CATIA license to the supplier.

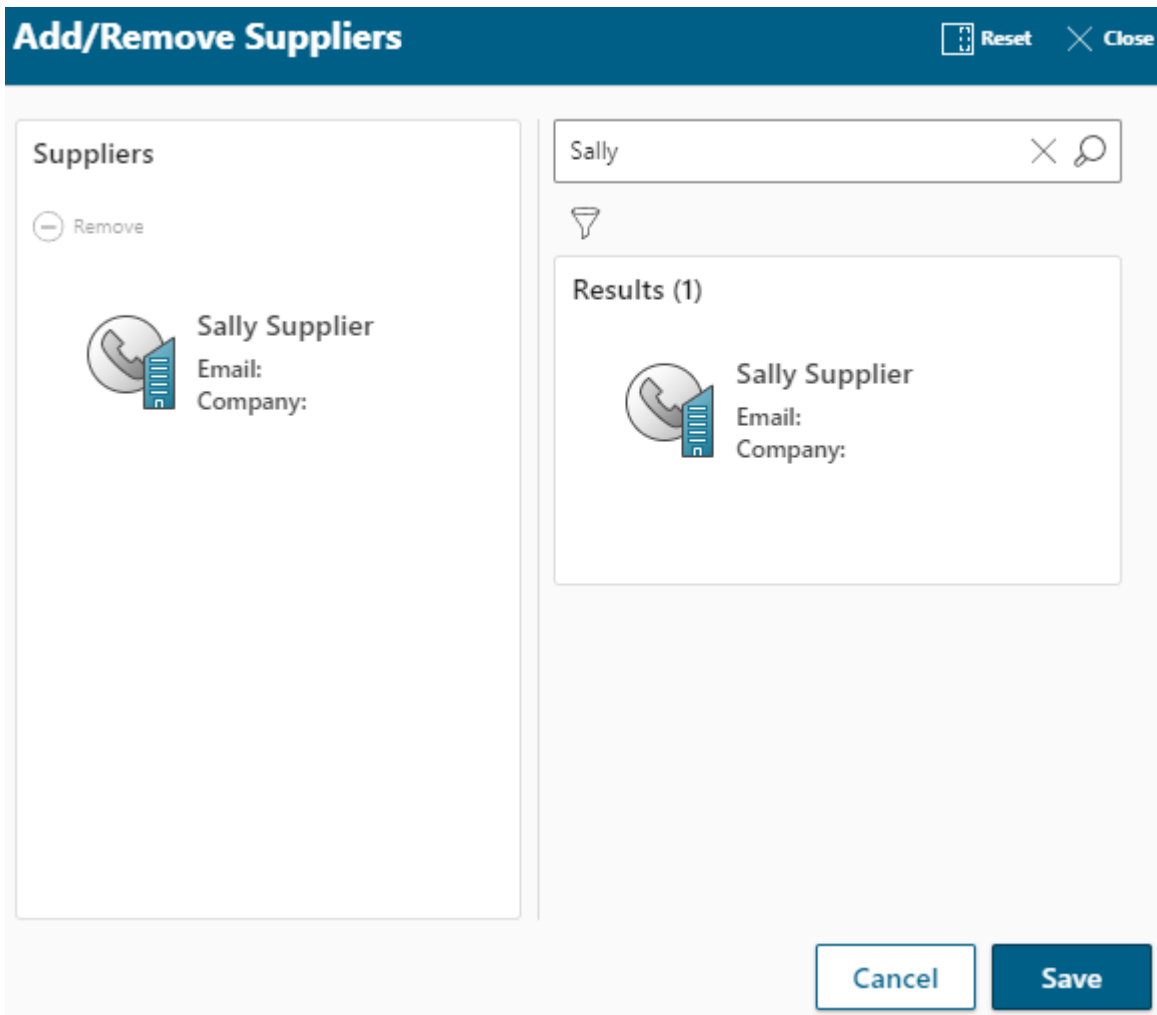
Suppliers require this license to download any Briefcase associated with the event, review the contents of the Briefcase, modify part designs in Briefcase Browser by using CATIA, and upload a new Briefcase with updated designs.

- c. Select the required suppliers from the search results and click **Add**.

Caution:

Siemens Digital Industries Software recommends that you assign the product structure to only one supplier from the supplier's company.

- d. To remove suppliers from the data exchange package, select the entries and click **Remove** ⊖.
- e. Click **Save**.



10. Add an attachment to the package as follows:

- a. In the **Supplemental Attachments** section, click **Add** ⊕.
- b. In the **Add** panel, click **Select File** to browse to and select the required file, and click **Add**.

Note:

If you are adding an attachment, ensure that you select the relation configured in the **MultiSiteExpOptSet** transfer option set.

11. If you select **Briefcase** as the **Package Type**, grant access to the assigned suppliers as follows:

- a. Click the **Access Management** tab.
- b. From the **As Seen By** list, select the required supplier.

4. Create a Supplier Connect data exchange package

When you select a supplier from the **As Seen By** list, the supplier's modification access is displayed in the **Checked-Out To** and **Ownership** columns.

As Seen By:

Mark for Ownersh... Cancel Mark for... Cancel Modificati... Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Ownership	Checked-Out To
Spindle Motor Assembly	HDD-0512	A	✓		
Bearing Large	HDD-0501	A	✓		
Bearing Small	HDD-0508	A	✓		
Motor Shaft	HDD-0545	A	✓		
Retainer	HDD-0536	A	✓		
Motor Core	HDD-0542	A	✓		
Platter Armature	HDD-0516	A	✓		

- c. To mark the items or assemblies for modification, do the following:
 - A. Expand the assembly, and select the required assembly components.
 - B. Click **Mark for Modification** , and select one of the following:
 - **Selected Only:** Marks the selected component for modification.
 - **Selected Plus Children:** Marks the selected component and its child components for modification.

For the selected components, the values in the **Checked-Out To** column are updated to the assigned supplier and the **Site ID** of the assigned supplier.

As Seen By: Carter Supplier

Mark for Ownersh...
 Cancel Mark for...
 Cancel Modificati...
 Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Ownership	Checked-Out To
▼ Spindle Motor Assembly	HDD-0512	A	✓		USP-Carter-Supplier-1167923809
Bearing Large	HDD-0501	A	✓		USP-Carter-Supplier-1167923809
Bearing Small	HDD-0508	A	✓		USP-Carter-Supplier-1167923809
Motor Shaft	HDD-0545	A	✓		USP-Carter-Supplier-1167923809
Retainer	HDD-0536	A	✓		USP-Carter-Supplier-1167923809
Motor Core	HDD-0542	A	✓		USP-Carter-Supplier-1167923809
Platter Armature	HDD-0516	A	✓		USP-Carter-Supplier-1167923809





When you expand or collapse an assembly, the expanded or collapsed state is retained. If you go to another tab in the package and return to the current tab, this pane displays the assembly in the same expanded or collapsed state.

- C. To cancel modification access, do the following:
- i. Select the supplier, expand the assembly, and select the required assembly components.
 - ii. Click **Cancel Modification Right** , and select one of the following:
 - **Selected Only**: Cancels the modification access to the selected component.
 - **Selected Plus Children**: Cancels the modification access to the selected component and its child components.
- d. To transfer ownership of items or assemblies, do the following:
- A. Expand the assembly, and select the required assembly components.
 - B. Click **Mark for Ownership Transfer** , and select one of the following:
 - **Selected Only**: Marks the selected component for the transfer of ownership.
 - **Selected Plus Children**: Marks the selected component and its child components for the transfer of ownership.








For the selected components, the values in the **Ownership** column are updated to the assigned supplier and the **Site ID** of the assigned supplier.

4. Create a Supplier Connect data exchange package

As Seen By: Carter Supplier


 Mark for Ownership...  Cancel Mark for...  Cancel Modificati...  Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Ownership	Checked-Out To
▼  Spindle Motor Assembly	HDD-0512	A	✓	USP-Carter-Supplier-11679238...	
 Bearing Large	HDD-0501	A	✓	USP-Carter-Supplier-11679238...	
 Bearing Small	HDD-0508	A	✓	USP-Carter-Supplier-11679238...	
 Motor Shaft	HDD-0545	A	✓	USP-Carter-Supplier-11679238...	
 Retainer	HDD-0536	A	✓	USP-Carter-Supplier-11679238...	
 Motor Core	HDD-0542	A	✓	USP-Carter-Supplier-11679238...	
 Platter Armature	HDD-0516	A	✓	USP-Carter-Supplier-11679238...	

When you transfer the ownership of an item or an assembly, the supplier now becomes the owner. To change it back, the supplier must return the ownership.

When you expand or collapse an assembly, the state is retained. If you go to another tab in the package and return to the current tab, this pane displays the assembly in the same expanded or collapsed state.

- C. To cancel the transfer the ownership, do the following:
 - i. Select the supplier, expand the assembly, and select the required assembly components.
 - ii. Click **Cancel Mark for Ownership Transfer** , and select one of the following:
 - **Selected Only**: Cancels the transfer of ownership for the selected component.
 - **Selected Plus Children**: Cancels the transfer of ownership for the selected component and its child components.

12. If you select **Live Data** as the **Package Type**, mark the items, assemblies, or datasets for modification as follows:

- a. Click the **Access Management** tab.
- b. From the **As Seen By** list, select the required supplier.

When you select a supplier from the **As Seen By** list, the supplier's modification access is displayed in the **Write Access** column.

As Seen By: Sally Supplier

Cancel Modification...
 Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Write Access	Checked-Out To
Spindle Motor Assembly	HDD-0512	A	✓	✗	
Bearing Large	HDD-0501	A	✓	✗	
Bearing Small	HDD-0508	A	✓	✗	
Motor Shaft	HDD-0545	A	✓	✗	
Retainer	HDD-0536	A	✓	✗	
Motor Core	HDD-0542	A	✓	✗	
Platter Armature	HDD-0516	A	✓	✗	

- c. Select the dataset and click **Mark for Modification** .

For the dataset, the **Write Access** column is updated to **Yes** ✓.

As Seen By: Alex Supplier



▼ Data

Name	File Size	Read Access	Write Access
Battery Design	26 KB	✓	✓








- d. Expand the assembly, select the required assembly components, click **Mark for Modification** , and select one of the following:
- **Selected Only:** Marks the selected component for modification.
 - **Selected Plus Children:** Marks the selected component and its child components for modification.

For the selected components, the values in the **Write Access** column are updated to **Yes** ✓.



4. Create a Supplier Connect data exchange package

As Seen By: Sally Supplier  Cancel Modificati...  Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Write Access	Checked-Out To
▼  Spindle Motor Assembly	HDD-0512	A	✓	✓	
 Bearing Large	HDD-0501	A	✓	✓	
 Bearing Small	HDD-0508	A	✓	✓	
 Motor Shaft	HDD-0545	A	✓	✓	
 Retainer	HDD-0536	A	✓	✓	
 Motor Core	HDD-0542	A	✓	✓	
 Platter Armature	HDD-0516	A	✓	✓	

When you expand or collapse an assembly, the expanded or collapsed state is retained. If you go to another tab in the package and return to the current tab, this pane displays the assembly in the same expanded or collapsed state.

- e. To cancel modification access, do the following:
 - A. Select the supplier, expand the assembly, and select the required assembly components.
 - B. Click **Cancel Modification Right** , and select one of the following:
 - **Selected Only:** Cancels the modification access to the selected component.
 - **Selected Plus Children:** Cancels the modification access to the selected component and its child components.
 - C. Select the dataset and click **Cancel Modification Right** .
13. If you select **Teamcenter Briefcase** as the **Package Type**, grant access to the assigned suppliers as follows:
 - a. Click the **Access Management** tab.
 - b. From the **As Seen By** list, select the required supplier.

When you select a supplier from the **As Seen By** list, the supplier's modification access is displayed in the **Checked-Out To** and **Ownership** columns.

As Seen By: Sumi Supplier

Mark for Ownersh...
 Cancel Mark for...
 Cancel Modificati...
 Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Ownership	Checked-Out To
Spindle Motor Assembly	HDD-0512	A	✓		
Bearing Large	HDD-0501	A	✓		
Bearing Small	HDD-0508	A	✓		
Motor Shaft	HDD-0545	A	✓		
Retainer	HDD-0536	A	✓		
Motor Core	HDD-0542	A	✓		
Platter Armature	HDD-0516	A	✓		

c. To mark the items or assemblies for modification, do the following:

A. Expand the assembly, and select the required assembly components.

B. Click **Mark for Modification** , and select one of the following:

- **Selected Only:** Marks the selected component for modification.
- **Selected Plus Children:** Marks the selected component and its child components for modification.

For the selected components, the values in the **Checked-Out To** column are updated to the **Site ID** of the assigned supplier.

As Seen By: Sumi Supplier



Mark for Ownersh...
 Cancel Mark for...
 Cancel Modificati...
 Mark For Modification

▼ Data

Name	ID	Revision	Read Access	Ownership	Checked-Out To
Spindle Motor Assembly	HDD-0512	A	✓		TC_BriefcaseSite03
Bearing Large	HDD-0501	A	✓		TC_BriefcaseSite03
Bearing Small	HDD-0508	A	✓		TC_BriefcaseSite03
Motor Shaft	HDD-0545	A	✓		TC_BriefcaseSite03
Retainer	HDD-0536	A	✓		TC_BriefcaseSite03
Motor Core	HDD-0542	A	✓		TC_BriefcaseSite03
Platter Armature	HDD-0516	A	✓		TC_BriefcaseSite03





4. Create a Supplier Connect data exchange package

When you expand or collapse an assembly, the expanded or collapsed state is retained. If you go to another tab in the package and return to the current tab, this pane displays the assembly in the same expanded or collapsed state.









- C. To cancel modification access, do the following:
- Select the supplier, expand the assembly, and select the required assembly components.
 - Click **Cancel Modification Right** , and select one of the following:
 - Selected Only:** Cancels the modification access to the selected component.
 - Selected Plus Children:** Cancels the modification access to the selected component and its child components.
- d. To transfer ownership of items or assemblies, do the following:
- Expand the assembly, and select the required assembly components.
 - Click **Mark for Ownership Transfer** , and select one of the following:
 - Selected Only:** Marks the selected component for the transfer of ownership.
 - Selected Plus Children:** Marks the selected component and its child components for the transfer of ownership.

For the selected components, the values in the **Ownership** column are updated to the **Site ID** of the assigned supplier.

As Seen By:


 Mark for Ownersh...  Cancel Mark for...  Cancel Modificati...  Mark For Modification

▼ Data

Name	ID	Revision	Description	Read Access	Ownership	Checked-Out To	
▼  Spindle Motor Assembly	SA000518	A		✓			
 Bearing Large	SA000519	A		✓			
 Bearing Small	SA000520	A		✓			
 Motor Shaft	SA000521	A		✓			
 Retainer	SA000522	A		✓	SiteCC		
 Motor Core	SA000523	A		✓	SiteCC		
 Platter Armature	SA000524	A		✓	SiteCC		

When you transfer the ownership of an item or an assembly, the supplier now becomes the owner. To change it back, the supplier must return the ownership.

When you expand or collapse an assembly, the expanded or collapsed state is retained. If you go to another tab in the package and return to the current tab, this pane displays the assembly in the same expanded or collapsed state.

- C. To cancel the transfer the ownership, do the following:
 - i. Select the supplier, expand the assembly, and select the required assembly components.
 - ii. Click **Cancel Mark for Ownership Transfer** , and select one of the following:
 - **Selected Only**: Cancels the transfer of ownership for the selected component.
 - **Selected Plus Children**: Cancels the transfer of ownership for the selected component and its child components.
14. Click the **Overview** tab, and set the expiration date of the package in **Data Sharing Expires on**.
15. To share the package to the assigned suppliers, click **Share with Suppliers**.

The status of the data exchange package changes to **Shared**. A notification email is sent to the assigned suppliers to access the data exchange package and respond to the data exchange package.

Note:

- After you share the package, you cannot edit it, but you can **share an interim update with a supplier for Briefcase and Teamcenter Briefcase packages**.
- If the sharing fails, you can review the reason for the failure in the **Status Reason** property displayed in the **Tracking** tab.

4. Create a Supplier Connect data exchange package

5. Track the actions performed by suppliers on a data exchange package

From the OEM Sponsor Site, you can track the actions performed by suppliers on a data exchange package in the OEM Supplier Site. You can do this in the **Tracking** tab of the data exchange package. When you send the package to the assigned suppliers, this tab is blank. As the assigned suppliers work on the package, their actions are recorded in the OEM Supplier Site. You can view the actions in the OEM Sponsor Site by navigating to the **Tracking** tab of the package and clicking **Sync** to retrieve the latest update of the supplier actions.


In the **Tracking** tab, you can track the following:

- Status of the data exchange package
- Supplier's geographic location upon login
- Status of response submission and associated actions and dates
- Event and item attachment uploads and downloads

To track actions performed by suppliers on a data exchange package:

1. From the **Newstuff** folder, select and open the data exchange package sent to the suppliers.
2. Click the **Tracking** tab and click **Sync**.

A notification is displayed in the **Alerts** panel when the tracking report is generated.

3. Click **Alerts**  and click the generated tracking report in the **Target Object** section to open the data exchange package.

5. Track the actions performed by suppliers on a data exchange package

▼ Properties

Message Subject: Tracking report for "Data Exchange 04/05/2024 00:02:54" is ready.

Priority: Normal

Event Type: Sync Tracking Report Success

Sent Date: 05-Apr-2024 17:35

Receiver: Oscar (oscar)

Message Body: Tracking report for "Data Exchange 04/05/2024 00:02:54" is ready.

Related Objects: [DE000092/A;2-Data Exchange 04/05/2024 00:02:54](#)

▼ Target Object

List Selection Mode Select All
Export To... Paste ...

Data Exchange 04/05/2024 00:...

DE000092

Revision: A

4. Click the **Tracking** tab to view the latest updates for the supplier actions.

Overview **Access Management** **Tracking**

Owner: Oscar (oscar) Type: Data Exchange Revision Status: Shared Sharing expires on: 24-Apr-2024 15:33 DE000175/A;2-Data Exchange 04/10/2024 15:31:45

▼ Status Tracking

Status Reason:

- 10-Apr-2024 10:06:42 UTC - Data Exchange 04/10/2024 15:31:45 was shared.
- 10-Apr-2024 10:06:29 UTC - Data Exchange 04/10/2024 15:31:45 is being shared with recipients.
- 10-Apr-2024 10:01:45 UTC - The Data Exchange Object was created.

▼ Activity Tracking

Table Selection Mode Select All
Export To... Paste ...

Company	Recipient	Confidentiality Agreement St...	Geography	Response Status	Submit Date	Email
Digital Engineering	Alex Supplier	Agreed	United States of A...	Submitted	10-Apr-2024 15:51	alex@digital.com
Digital Engineering	Alex Supplier	Agreed	United States of A...	New		alex@digital.com

▼ Attachment Tracking

Table Selection Mode Select All
Export To... Paste ...

Company	Recipient	Attachment	Action	Date	Part
Digital Engineering	Alex Supplier	Motorplate Specifications	Download	10-Apr-2024 15:39	DE000175/A;2-Data Exchange 04/10/2024 15:31:45
Digital Engineering	Alex Supplier	Connector Measurements	Download	10-Apr-2024 15:38	DE000175/A;2-Data Exchange 04/10/2024 15:31:45
Digital Engineering	Alex Supplier	Connector Specifications	Download	10-Apr-2024 15:38	DE000175/A;2-Data Exchange 04/10/2024 15:31:45

5-2

Supplier Connect for Data Exchange, Teamcenter 2412
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6. Review a supplier's response

When you receive a notification email to review the supplier's response, you can open your **INBOX** and open the supplier's response to review the designs. You can review the new items created by the supplier, their updates to the assemblies, and their updated Briefcases. You can also view any comments and attachments added while submitting the response.

Note:

The updated designs are imported into the design engineer's Teamcenter site before the approval or rejection process.

Procedure

1. In the **INBOX** tile on the **Home** page, click the **Review Supplier Response** task for the supplier's response.

The screenshot shows a user interface for reviewing a supplier response. At the top, there are three tabs: **Overview** (selected), **Attachments**, and **Workflow**. Below the tabs is a section titled **Action** with a downward arrow. Under **Action**, there are three fields: **Name:** Review Supplier Response, **Workflow Description:** Review "frances", and **Comments:** with an empty text box. Below the comments box are five blue buttons: **Approve**, **Interim Approve**, **Reject**, **Rework**, and **Send To Review Team**.


2. To view the supplier updates to an assembly in a **Live Data** package, do the following:

- a. Click the **Attachments** tab in the right pane, and select and open the supplier's response in the **Replica Proposed Target** section.
- b. In the supplier's response, expand the assembly to view the updates made by the supplier.

▼ **Structure**

Line Item: SA000125/A;1-Spindle ... ▼

Name	ID	Revision
▼ Spindle Motor Assembly	SA000125	A
Retainer	SC000085	A
Bearing Large	SA000127	A
Bearing Small	SA000128	A
▼ Motor Shaft	SA000129	A
Motorplate	SC000083	A

- c. Download attachments sent by the supplier as follows:
 - A. In the supplier's response, expand the assembly, and select the attachments below the update to the assembly.
 - B. Choose **More commands** ... > **Share**  > **Download**.


Based on your browser settings, the file may open immediately, or you may be prompted to download or save the file.

A message notifying how many files were downloaded is displayed.

Note:



The saved location of the downloaded files and the ability to download more than one file at a time varies depending on your browser and its settings.



3. To view the supplier updates to a Briefcase in a **Briefcase** package, do the following:
 - a. Click the **Attachments** tab in the right pane, and select and open the data exchange package in the **All References** section.
 - b. Click the **Briefcases** tab.

- c. To compare the OEM and supplier Briefcases, choose **More commands ... > View**  **> Compare Briefcases**.
- d. Briefcase contents can be mapped to different objects and structures upon import. To compare Briefcases with contents after mapping, from the **Transfer Option Set** list, choose a transfer option set that has mapping transformation rules defined.

Compare Briefcases Close



Source

 Paste  Add



 **sa000988_a_spindle_motor_assembly_f...**
Type: Briefcase
Owner: frances (frances)
Date Modified: 31-Oct-2023 02:41


Transfer Option Set:

Target

 Paste  Add

Compare with:
 Briefcase Current state

 **sa001050_a_spindle_motor_assembly_fu...**
Spindle Motor AssemblyUSP-frances-117587071...
Type: Briefcase
Owner:
Date Modified: 31-Oct-2023 01:23


Transfer Option Set:

Compare

The objects in the Briefcases will be transformed according to those rules prior to the comparison.

- e. Click **Compare**.

sa000988_a_spindle_motor_assembly_full_-1175870713_...

Type: Briefcase
 Owner: frances (frances)
 Date Modified: 31-Oct-2023 02:41

Transfer Option Set: TIEImportOptionSetDefault

ID	Status	Revision	Name
SA000988		A	Spindle Motor Assembly
SA000989		A	Bearing Large
SA000990		A	Bearing Small
SA000991		A	Motor Shaft
SA000992		A	Retainer
SA000993		A	Motor Core
SC000477	Replica	A	Motorplate
SC000489	Replica	A	Connector
SA000994		A	Platter Armature

sa001050_a_spindle_motor_assembly_full_-1175870713_10_31_2023_01_23...

Spindle Motor AssemblyUSP-frances-117587071341230131OctTue2023

Type: Briefcase
 Owner:
 Date Modified: 31-Oct-2023 01:23

Transfer Option Set: TIEImportOptionSetDefault

ID	Status	Revision	Name	Description
SA001050		A	Spindle Motor Assembly	
SA001051		A	Bearing Large	
SA001052		A	Bearing Small	
SA001053		A	Motor Shaft	
SA001054		A	Retainer	
SA001055		A	Motor Core	
SA001056		A	Platter Armature	



Postrequisites

After the review, **approve or reject the response**.

7. Preview or compare the supplier's Briefcase

When you grant a supplier the modification rights to a CAD assembly and send it to the supplier in a Briefcase, the supplier can work on the assembly and send a response. When you review the response, you must ensure that the updated Briefcase matches your requirements. In the response, you can preview or compare the supplier's Briefcase with the one that you had sent.

Procedure

1. From the **Newstuff** folder, select and open the required data exchange package.
2. Click the **Responses** tab, and then select and open the supplier's response to view its details.
3. In the **Briefcases** tab, select the two Briefcases: your Briefcase and the one received from the recipient.
4. Choose **More commands** **...** > **View**  > **Compare Briefcases** .
5. Briefcase contents can be mapped to different objects and structures upon import.

To compare Briefcase contents as they appear after mapping, choose **Source** and **Target** transfer option sets that have the appropriate transformation rules defined. The objects in the Briefcases are transformed according to those rules before the comparison.

Compare Briefcases Close

Source

Paste Add

sa000790_a_mrb_bicycle_...
MRB_Bicycle_FrameUSP-Chen ...
Type: Briefcase
Owner: Oscar (oscar)
Date Modified: 14-Dec-2023 ...

Transfer Option Set:

Target

Paste Add

Compare with:

Briefcase Current state

MRB_Bicycle_Frame_A_12...
Type: Briefcase
Owner: Chen Supplier (eci.che...)
Date Modified: 14-Dec-2023 ...

Transfer Option Set:

Compare

6. Click **Compare**.

A comparison of the two Briefcases is displayed. Expand and collapse the hierarchy of items to compare them.

Color-coded bars identify changed objects in the Briefcases:

- Red identifies items that are not in the Briefcase or Teamcenter database.
- Green identifies new items.
- Yellow identifies items that are changed.

Note:

If you hover over the color bar, you can view the action performed on the updated assembly or its child components.

sa000790_a_mrb_bicycle_frame_full_-1708233704_12_15_2023_04_12_36
 MRB_Bicycle_FrameUSP-Chen Supplier-170823370436120415DecFri202
 Type: Briefcase
 Owner: Oscar (oscar)
 Date Modified: 14-Dec-2023 17:42

Transfer Option Set: No Option Set Selected

ID	Status	Revision	Name	Description
SA000790		A	MRB_Bicycle_Frame	MRB_Bicycle_Frame

MRB_Bicycle_Frame_A_12152023-061125-ReturnBriefcase
 Type: Briefcase
 Owner: Chen Supplier (eci.chen)
 Date Modified: 14-Dec-2023 19:43

Transfer Option Set: No Option Set Selected

ID	Status	Revision	Name	Description
SA000790		A	MRB_Bicycle_Frame	MRB_Bicycle_Frame
SA555538		A	SAS55538	SAS55538
pmi_01-04-03_Bracket - Rea...		A	pmi_01-04-03_Bracket - R...	pmi_01-04-03_Bracket - R...
pmi_01-04-01_Reflector Rea...		A	pmi_01-04-01_Reflector Rea...	pmi_01-04-01_Reflector Rea...
pmi_01-04-02_Clamp - Rear...		A	pmi_01-04-02_Clamp - Re...	pmi_01-04-02_Clamp - Re...

8. Share an interim update with a supplier

For **Briefcase** or **Teamcenter Briefcase** packages, if there is a change in the expiration date or changes to the reference product data in the OEM Sponsor Site, you must share these updates with the assigned suppliers. This allows the suppliers to work on the latest version of the product data and plan their responses for the new expiration date. After you complete the required product data updates or modify the expiration date of the data exchange package, you can send the updated package to the supplier. This sends a notification email with the updated expiration date and a delta Briefcase to the assigned suppliers. If you have only changed the expiration date, a delta Briefcase is not created because there are no updates to the product data.

Procedure

1. From the **Newstuff** folder, select and open the required data exchange package.
2. Make the required updates to the product data. For more information on working with parts and designs represented in a hierarchy, as a structure, see *Structure Management* in the Teamcenter documentation.
3. In the **Overview** tab of the data exchange package, set the expiration date of the package in **Data Sharing Expires on**.
4. Click **Update**.

This sends a notification email with the package updates and a delta Briefcase to the assigned suppliers. A delta Briefcase with the updated assembly is created in the **Briefcases** tab of the data exchange package, and its status changes to **Updated**. If you have only changed the expiration date, a delta Briefcase is not created because there are no updates to the product data.

8. Share an interim update with a supplier

9. Approve or reject a supplier's response or send for rework

After you review a supplier's response, you can approve it, give interim approval, reject it, send it for rework, or send it to a review team. The supplier is notified of your decision by email.

Note:

The updated designs are imported into the design engineer's OEM Sponsor Site before the approval or rejection process.

Procedure

1. In the **INBOX** tile on the **Home** page, click the **Review Supplier Response** task for the supplier's response.

Overview Attachments Workflow

▼ **Action**

Name: Review Supplier Response

Workflow: Review "frances"

Description: Review "frances"

Comments:

Approve

Interim Approve

Reject

Rework

Send To Review Team

2. Under **Action**, provide your review comments in the **Comments** box.

3. To approve the supplier's response, click **Approve**.

The updates from the suppliers are imported into the OEM Sponsor Site. Additionally, all checked-out objects are checked into the OEM Sponsor Site.

A notification email is sent to the supplier about the approval, and the status of the response is updated to **Approved**.

4. To provide interim approval for the supplier's response, click **Interim Approve**.

When a supplier sends a response, you can review the supplier's additions, deletions, and updates to the design. For instance, you might want to begin using the updated version of the design and still require further updates from the supplier. In such a case, you must specify that the current response from the supplier is not the final response. To do this, provide interim approval to initiate the workflow that allows the supplier to submit a new response.

A notification email is sent to the supplier about the interim approval, and the status of the response is updated to **Interim Approved**. The supplier can work on the required updates, and send a new response. You can then review the new response, and approve it if it meets the requirements.

5. To permanently reject the supplier's response, click **Reject**.

A notification email is sent to the supplier about the rejection, and the status of the response is updated to **Rejected**.

6. To specify that the supplier's response needs rework, click **Rework**.

A notification email is sent to the supplier about the revisions that must be made, and the status of the response is updated to **Rework**. The supplier can work again on the data exchange package and submit a new response for review. You can then review the new response, and approve it if it meets the requirements.

7. To send the supplier's response to a review team for their opinion on the response, click **Send to Review Team**.

When you click **Send to Review Team**, the workflow assigns a task to you for assigning the team members who will review the supplier's response. After you assign the team members, the workflow assigns signoff tasks for each of the team members. When the team members perform their review, and submit the approval or rejection, the review task appears in your **Inbox** again. You can review their approval or rejection in the **Workflow** tab of the task. Based on the review team's responses, you can approve or reject the supplier's response.



10. Publish an assembly to all suppliers in a project

If your administrator has implemented project security in your Teamcenter environment, you, as a design engineer, can simultaneously publish an assembly to all suppliers in a project. This allows you to share an assembly with all associated suppliers at once. Project security ensures that only project members can access the assemblies associated with the project. When you publish an assembly, each supplier in the project can search for and work on it in their OEM Supplier Site.

Prerequisites

- The administrator has implemented project security in your Teamcenter environment.
- The administrator has assigned the design engineers, Teamcenter user accounts for the suppliers, and the suppliers to their associated projects.
- You, as a design engineer, have created the assembly and assigned the assembly and its components to the same project as the suppliers.


Procedure

1. Search for and select the assembly to be shared with all suppliers in the project.
2. Select the parent node of the assembly, and choose **More Commands ... > Share**  **> Publish to Suppliers** .

Note:

Publish to Suppliers is available only when you select the parent node of the assembly.

A reference data exchange is created in the **Supplier Exchanges** tab. The status of the exchange begins with **Unpublished** and moves to **Published** after the assembly is published to all suppliers in the project. A notification is displayed in **Alerts**  when the publishing is complete.

3. Click **Alerts**  and click the reference data exchange in the **Target Object** section to open it.

▼ Properties

Name: Reference Data Exchange 10/15/2024 14:08:58
Published On: 15-Oct-2024 14:09
Package Type: Live Data
Status Reason: 15-Oct-2024 08:39:18 UTC - Reference Data Exchange 10/15/2024 14:08:58 was shared.
 15-Oct-2024 08:39:08 UTC - Reference Data Exchange 10/15/2024 14:08:58 is being shared with recipients.
 15-Oct-2024 08:38:58 UTC - The Data Exchange Object was created.

▼ Data and Suppliers

Selection mode. Select All

Data	Suppliers	
Spindle Motor Assembly	Alex Supplier, Bob Supplier	

▼ Suppliers Contact Information

Name	Email	Phone (Bus...)	
Bob Supplier	Bob_Supplier@siemens.com		
Alex Supplier	Alex_Supplier@siemens.com		

You can view the suppliers who will receive the assembly in their sites.

- In the **Supplier Exchanges** tab, verify that the status of the exchange is **Published**.

Overview Partners Where Used Attachments History Participants Supplier Exchanges Reports

▼ Supplier Exchanges

Object	Type	Owner	Group ID	Status	Suppliers
000191/A;1-Reference Data Exchange 10/15/2024 14:08:58	Reference Data Exchange Revision	Oscar (oscar)	Engineering	Published	Alex Supplier, Bob Supplier

- Send an email or a message to the associated suppliers that you have published the assembly and that it is available to them for work on in their OEM Supplier Site.

Ensure that you send the name or ID of the assembly to the associated suppliers. This allows the suppliers to search for the assembly in their sites using this information.

11. Respond to a supplier's request for modification rights


A supplier can request modification rights for an item or parts in the assembly through a *Self Service* package. When you receive this request, you can review it and provide modification access. If you do not want to provide modification access, you can share the Self Service package with the supplier without any updates. The supplier receives an email notifying them about your response to the Self Service package.

When you receive an email to review the Self Service package, you can open the package from your **INBOX**. In this package, you can view the item or parts in the assembly for which the supplier has requested modification rights. You can also view the reasons for the request.

Procedure


1. In the **INBOX** tile on the **Home** page, click the **Review Self Service Request** task for the supplier's Self Service package.
2. Click the **Attachments** tab in the right pane, and select and open the supplier's Self Service package in the **Replica Proposed Target** section.
3. In the **Data requested for write access or ownership** section, review the details of the request.
4. After reviewing the requests from the supplier, if you do not want to provide modification access, share the Self Service package with the supplier without any updates as follows:
 - a. Click the **Overview** tab.
 - b. Specify an expiration date for the package in **Data Sharing Expires on** and click **Share with Suppliers**.


The status of the Self Service package is updated to **Rejected**, and a notification email is sent to the supplier.


5. If you choose to provide modification access to the required suppliers, do the following:
 - a. In the **Data requested for write access or ownership** section, select the request, and choose **Approve** .

The **Assigned Request Access** column displays the status as **Approved**  for the request.

11. Respond to a supplier's request for modification rights

▼ Data requested for write access or ownership					
Object	Context	Include Children	Current Access	Requested Access	Assigned Request Access
 000183/A;1-Spindle Motor Assembly	000183/A;1-Spindle Motor Assembly	True	Read	Write	✓

▼ Data and Suppliers				
Data	Revision Rule	Variant Rule	Suppliers	
 000183/A;1-Spindle Motor Assembly	Latest Working		Alex Supplier	

▼ Suppliers Contact Information			
Name	Email	Phone (Bus...)	
 Alex Supplier	Alex_Supplier@siemens.com		


- b. Specify an expiration date for the package in **Data Sharing Expires on** and click **Share with Suppliers**.

The status of the Self Service package is updated to **Shared**, and a notification email is sent to the supplier. A notification is displayed in **Alerts**  when the package is sent to the supplier.

12. Share files with suppliers

Using Teamcenter, securely share files with suppliers to facilitate collaboration and maintain data integrity throughout the exchange process. This eliminates the need for external file-sharing tools or less-secure methods such as email, providing a secure and integrated platform for file exchanges between OEMs and suppliers.

Procedure

1. On the global navigation toolbar, click the **SUPPLIER EXCHANGES** tile.
2. In the **Outgoing** page, from the primary toolbar, click **Quick Share** .
3. In the **Properties** section of the **Quick Share** panel, for the files you are sending to the suppliers, enter a name, description, and review instructions.

Quick Share ✕ Close

▼ **Properties**

* **Name:**

Required

Description:

Instructions:

▼ **Files**

Choose File *Drag and Drop files here*

▼ **Suppliers**

+ Add Suppliers

Save **Share**

4. In the **Files** section, click **Choose File** and browse to select and add the required files.

5. In the **Suppliers** section, select the required suppliers as follows:
 - a. Click **Add Suppliers**.
 - b. In the **Add Suppliers** panel, specify the search criteria for the required suppliers, and click **Search** to search for a supplier.
 - c. Select the required suppliers from the search results and click **Add**.
 - d. To remove suppliers, select the entries and click **Remove** ⊖.
 - e. Click **Add**.
6. To save the package for future updates before sending to the selected suppliers, click **Save**.

The package is saved in the **Outgoing** page. You can open the package, add files and suppliers, and share it with the suppliers after you have completed the required updates.

7. To send the files to the selected suppliers immediately, click **Share**.

Quick Share
✕ Close

▼ Properties

*** Name:**

Warranty Approval and Payment Order

Description:

The warranty has been approved for the specified period and the payment order is released.

Instructions:

Please download a copy of the approval and payment order, and add it to the project documents.

▼ Files


Choose File

Drag and Drop files here

Payment Order.docx	(0.017MB) ✕
Warranty Approval.docx	(0.017MB) ✕

▼ Suppliers

+ Add Suppliers



Alex Supplier

Email:



Company:

Save

Share

When you share the package, the status of the package is updated to **Shared**. After you share the package, you can update its expiration date at any time, and the updated date is reflected in the

package at the OEM Supplier Site. The status of the package changes to **Updated** when you update the expiration date.

8. After the suppliers review the files, they can send them back for rework. To update the files and send the updated versions to the suppliers, do the following:
 - a. In the **INBOX** tile on the **Home** page, click the **Review Supplier Response** task for the supplier's response.
 - b. Click the **Attachments** tab in the right pane, and select and open the supplier's response in the **Replica Proposed Target** section.
 - c. In the **Files** section, review the supplier comments and download the files sent by the supplier to review them.
 - d. Make the required updates to the files you have sent earlier, and replace these files in the package with the updated versions as follows:
 - A. In the **Files** section of the response, select the file to be replaced.
 - B. From the work area toolbar, choose **More Commands ...** > **Edit**  > **Replace File** .
 - C. In the **Replace** panel, click **Select File** to browse to and select the required file, and click **Replace**.
 - e. In the **Attachments** tab, select and open the supplier's package in the **All References** section.
 - f. To send the updated files to the suppliers, click **Update**.

The supplier receives the updated files.

13. Approve or reject files from a supplier or send for rework

In some cases, you might ask the supplier to provide certain documents, such as policy documents or templates. When the suppliers send the files, you review the files, and you can approve them, reject them, or send the files back for rework. The supplier is notified of your decision by email.

Procedure

1. In the **INBOX** tile on the **Home** page, click the **Review Supplier Response** task for the supplier's request for file review.

Overview Attachments Workflow Assignments

▼ Action

Name: Review Sponsor Response

Workflow Description: Review "Supplier Warranty Claim Documents" from "Jim"

Comments:

Approve

Reject

Rework

2. Click the **Attachments** tab in the right pane, and select and open the supplier's package in the **Replica Proposed Target** section.
3. In the **Data** section, download the files sent by the supplier, and review them.
4. In the **Responses** section, select and open the response.
5. Under **Task to Perform**, provide your review comments for all files in the **Comments** box.

New Approved

▼ **Task to Perform**

Workflow: Review "Exchanges received - By Status" from "Alex Supplier"

Name: Review Sponsor Response

Workflow Description: Review "Exchanges received - By Status" from "Alex Supplier"

Comments:

Approve

Reject

Rework

6. To approve the supplier's files, click **Approve**.

A notification email is sent to the supplier about the approval, and the status of the response is updated to **Approved**.

7. To permanently reject the supplier's files, click **Reject**.

A notification email is sent to the supplier about the rejection, and the status of the response is updated to **Rejected**.

8. To specify that the supplier's response needs rework, click **Rework**.

A notification email is sent to the supplier about the rework to be done, and the status of the response is updated to **Rework**. The supplier can rework the files and submit the updated files for review. You can then review the updated files and approve them if they meet the requirements.

14. Cancel a data exchange package

In cases where the requirements or specifications from the OEM have changed or the package contains incorrect or outdated information, and it does not require a response, you might need to cancel the package. This might also be done in cases where the supplier has changed, has not sent the required deliverables, or has submitted an incomplete response. The supplier is notified of the cancellation by email.


You can cancel the package under the following conditions:

- The status of the data exchange package is **Created** or **Shared**.
- The status of the supplier's response is **Submitted**, **Approved**, **Rejected**, or **Interim Approved**.

Effects of canceling the package

- The status of the package is updated to **Canceled**.
- For parts marked for modification, the **Write** access privilege is removed.
- If ownership of the parts has been transferred, ownership is returned to the OEM.
- If a supplier has made updates to an assembly or its components and checked in the updates, these updates are retained. If the updates are not checked in, the updates not applied.
- If the supplier has submitted a response, the supplier can continue to view the response but cannot make any updates to the package. The supplier can no longer view the data that can be modified or viewed in the **Data You Can View** section.

Procedure

1. From the **Newstuff** folder, select and open the required data exchange package.
2. From the primary toolbar, click **Cancel Exchange** .
3. In the **Cancel Exchange** panel, specify the reason for the cancellation in the **Remarks** box, and click **Cancel Exchange**.

Cancel Exchange Reset Close

▼ **Warning Message**

Warning - Once the exchange(s) is/are canceled, any shared data will expire, and any workflows associated with the exchange(s) will be aborted.

Remarks:

Cancel Cancel Exchange

15. Close a data exchange package

If you, as a design engineer, have received the required responses, you can close it. Closing the package notifies the assigned suppliers that you will not accept any further responses for the package.



You can close the package under the following conditions:

- The status of the data exchange package is **Shared**.
- The status of the supplier's response is one of the following: **Submitted**, **Approved**, **Rejected**, or **Interim Approved**.

Effects of closing the package

- The status of the package is updated to **Closed**.
- For parts marked for modification, the **Write** access privilege is removed.
- If ownership of the parts has been transferred, ownership is returned to the OEM.
- If a supplier has made updates to an assembly or its components and checked in the updates, these updates are retained. If the updates are not checked in, the updates not applied.
- Suppliers will no longer be able to view their submitted responses. They will only be able to view the data in the **Data You Can View** section.
- If the supplier has submitted a response, the supplier can continue to view the response but cannot make any updates to the package. The supplier can no longer view the data in the **Data You Can Modify** section, but they can view it in the **Data You Can View** section.

Procedure

1. From the **Newstuff** folder, select and open the required data exchange package.
2. To close the data exchange package, choose **More commands ... > Manage**  **> Close Exchange** .
3. In the **Close Exchange** panel, specify the reason for the closure in the **Remarks** box, and click **Close Exchange**.

Close Exchange

Reset Close

▼ Warning Message

Warning - "DE000413/A;2-Data Exchange 04/24/2024 23:39:59" will be closed.

Remarks:

Cancel Close Exchange

The status of the package is updated to **Closed**, and a notification email is sent to the supplier about the package closure. The ownership of the package Briefcase is transferred to the sponsor.