



TEAMCENTER

Vendor Management on Rich Client — Usage

Teamcenter 2412

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1. Overview of Vendor Management

What is Vendor Management?

To compete effectively in today's marketplace, many companies outsource the manufacturing of the component parts in their products in significant numbers. A rich ecosystem of suppliers, manufacturers, and distributors (collectively referred to as *vendors*) support the outsourcing process by providing parts to a manufacturing company. Vendors provide both direct materials (such as parts and assemblies) and indirect materials (such as tooling in the manufacturing process). Managing vendor and vendor part information is therefore critical to the outsourcing process. Using Teamcenter Vendor Management, you can integrate your PLM system and process knowledge with your vendor supply chain.

You can model vendor contributions to a product by capturing information about vendors and the parts that they provide to satisfy the form, fit, and function of commercial parts. You can also manage the changes in vendor information over time. Vendor Management is available in the My Teamcenter and Structure Manager applications. You require standard Teamcenter user and administrator accounts to use Vendor Management.

Vendors, vendor parts, and commercial parts

Vendors

A vendor supplies one or more parts and can be a supplier, manufacturer, or distributor. For example, Goodparts, a company that supplies parts to your company is a vendor. Two distinctive attributes of a vendor are the company location and the vendor contacts or company contacts.

A vendor's company location provides information about the vendor's site or facility, including the name (required), web site, address, region, location code, location type, and notes about that site. An employee designated as the one-point contact in the vendor's organization is referred to as a company contact or vendor contact. A company location can be related to any number of company contacts. However, a company contact can be related to only one company location.

Similarly, you can associate several company contacts with one vendor. For example, Natalie is a sales person from Goodparts' regional sales office in Detroit, MI, USA, and Sasha is a sales person from their regional sales office in Stuttgart, Germany.

Vendor parts

The part that a vendor supplies is called a **vendor part**.

A vendor part:

- Is obtained from a single vendor, and not from multiple vendors. However, a vendor may supply multiple vendor parts.

- Can be associated with one or more commercial parts.
- Has a vendor part name assigned by the vendor or assumes the company's name for the part.
- Has a vendor ID and vendor name, which identify the vendor supplying the part.
- Has a part number assigned by the manufacturer of the part.
- Is related to a vendor company location.

Vendor parts may also be classified based on their status, such as, preferred, backup, approved, or obsolete. This allows your company to always use the best source of vendor parts. It also allows you to grade the overall product bill of materials (BOM).

Note:

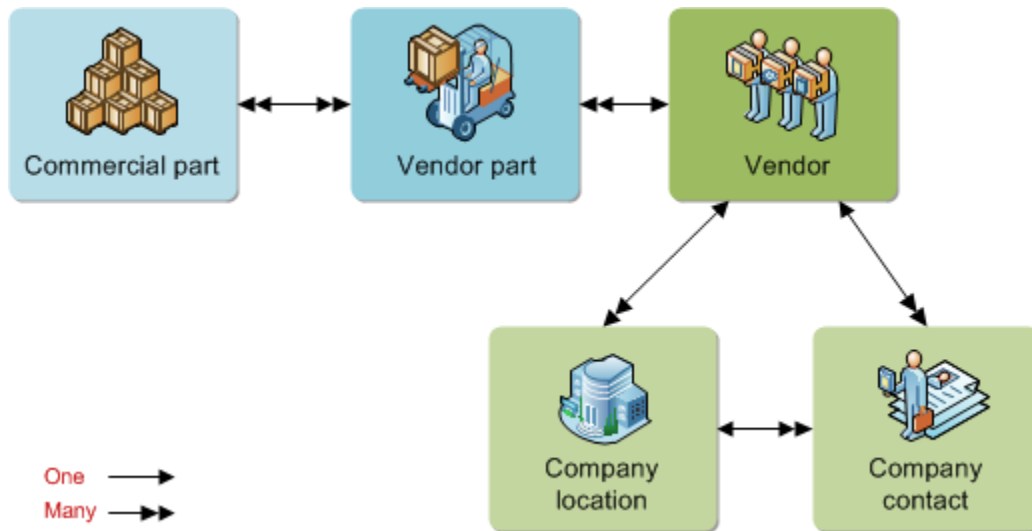
A **VendorPart** object cannot be sent to Structure Manager to be included in a product structure unless the vendor part is related to an Item Revision by a **Vendor Representation** relation. Additionally, you cannot add an object to a vendor part in the BOM structure because a vendor part is always the leaf node (lowest level node) in the hierarchy.

Commercial parts

A commercial part is a part that is made externally by a vendor who resells, builds, or designs and builds the part for your company. In this context, your company is referred to as the original equipment manufacturer (OEM). Commercial parts can be off-the-shelf market parts or custom-designed parts.

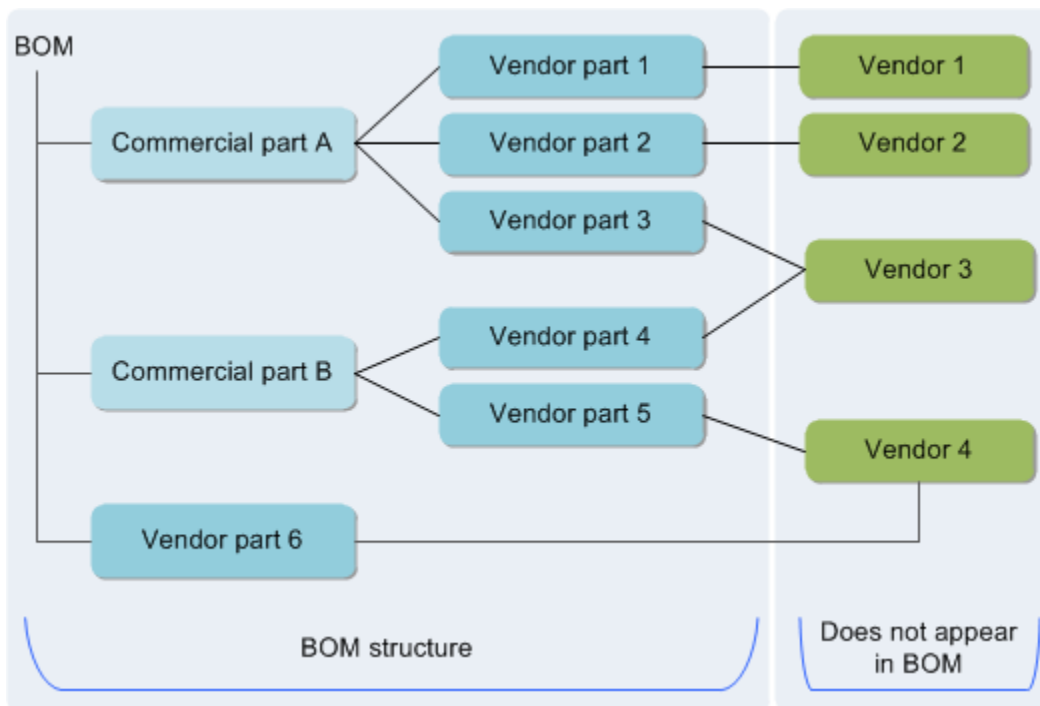
The form, fit, and function of a commercial part can be satisfied by one or more vendor parts that you may source from one or more vendors. Typically, a commercial part has one or more associated **VendorPart** objects.

In Vendor Management, you can classify commercial parts by status such as preferred, approved, or obsolete. This allows you to grade the overall product BOM.

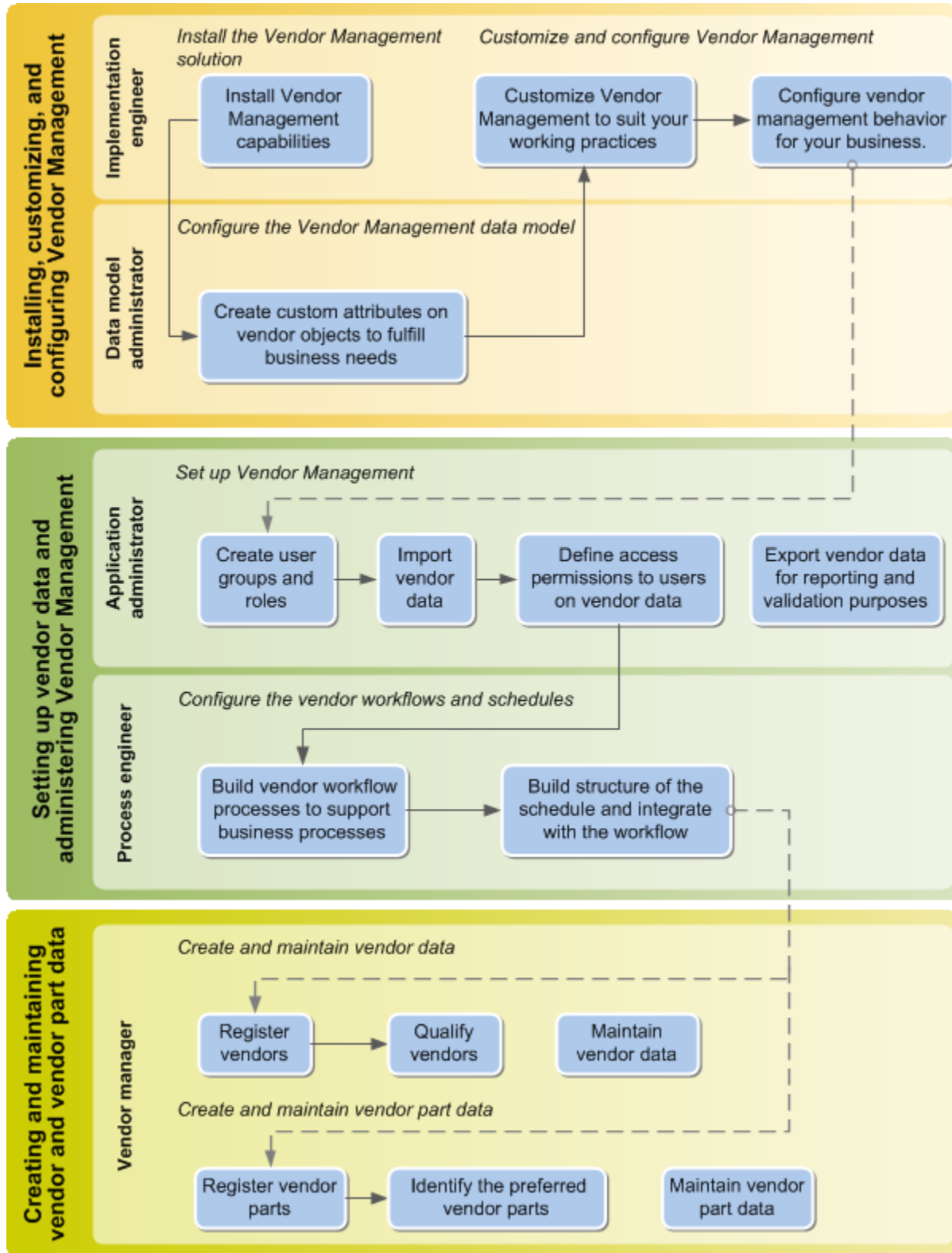


Relation between vendors, vendor parts, and commercial parts

You can view vendor data from both — a vendor-centric and a part-centric point of view. You relate vendors to the parts that they supply. Vendor parts in turn may be related to commercial parts. You can use both commercial parts and vendor parts in your BOMs.



Vendor Management process description and user roles



The following users are involved in the Vendor Management business process:

| User role | Responsibilities | Tasks |
|--------------------------|---|---|
| Implementation Engineer | <p>Is responsible for the upkeep, configuration, and reliable operation of computer systems, especially multiuser computers, such as servers. Also responsible for:</p> <ul style="list-style-type: none"> • Product installation (for example, Teamcenter) • Application installation (for example, Vendor Management) • Upgrade from earlier releases • Dispatcher installation • Integrations • Server and client installation • FSC, and communications • Multisite, and managing servers | <p>Install the Vendor Management solution</p> <p>Customize Vendor Management</p> <p>Configure Vendor Management</p> |
| Data Model Administrator | <p>Is responsible for the configuration of the data model to meet company requirements and user needs. Also responsible for:</p> <ul style="list-style-type: none"> • Data model configuration • LOV definitions • Condition behavior settings • Rule configuration such as naming rules and deep copy rules | <p>Configure the Vendor Management data model</p> |

| User role | Responsibilities | Tasks |
|---------------------------|---|---|
| Application Administrator | <p>Is responsible for the configuration of software and data to meet company requirements and user needs. Also responsible for:</p> <ul style="list-style-type: none"> • User and data security • Data migration • Data import and export • Process configuration • Smart folder configuration • Document management settings • Publication structure definition | <p>Creating user groups</p> <p>Creating vendor roles</p> <p>Importing vendor data</p> <p>Defining access permissions to users on vendor data</p> <p>Exporting vendor data for reporting and validation purposes</p> |
| Process Engineer | <p>Is responsible for the business process configuration in the software and process configuration. The process engineer builds vendor workflows and schedules as required.</p> | <p>Building vendor workflow processes to support business processes</p> <p>Building the schedule and integrating it with the workflow</p> |
| Vendor Manager | <p>Manages vendor process from requests through selection. Oversees the entire Vendor Management process.</p> <p>Tasks include:</p> <ul style="list-style-type: none"> • Registering vendors, creating vendor parts, managing make/buy decisions, and importing vendor bulk data. • Deciding the workflow process to be used for the bid process, creating bid packages, submitting the bid to a workflow, conducting | <p>Register vendors</p> <p>Qualify vendors</p> <p>Maintain vendor data</p> <p>Register vendor parts</p> <p>Identify preferred vendor parts</p> <p>Maintain vendor part data</p> |

| User role | Responsibilities | Tasks |
|-----------|---|-------|
| | <p>bid review meetings, and monitoring the bid progress and making improvements to it.</p> <ul style="list-style-type: none"> Coordinating the status of vendor parts according to the decision of the review board and participating in the workflow. | |

Understanding Vendor Management using an example



Let us consider a scenario where you are manufacturing the Nanobox, a compact and flexible embedded industrial PC.

Considering various factors, you have decided to outsource the connector and housing components of the Nanobox. You would therefore need to create and maintain vendor and vendor part information for these parts.

You have manufacturing plants for the Nanobox in Detroit, MI, USA, and in Stuttgart, Germany. Considering this, you have identified some new vendors. Bestparts and Goodparts are housing vendors, and Patriot is the vendor for connectors.

You start by registering new vendors, qualifying them, and then maintaining vendor data as needed.

You also register the vendor parts such as the connector and housing, and identify preferred vendor parts based on your procurement team's input. You can then maintain the vendor part data as required.

Vendor Management in conjunction with other Teamcenter applications

Vendor Management is available in the My Teamcenter and Structure Manager applications. It also interacts with the following Teamcenter applications:

- Aerospace and Defense

Installing Vendor Management is a prerequisite if you implement the Aerospace and Defense solution.

- Industry-focused solutions such as Consumer Packaged Goods

You can optionally use Vendor Management with other industry-focused solutions such as Consumer Packaged Goods.

- Teamcenter Client for Microsoft Office

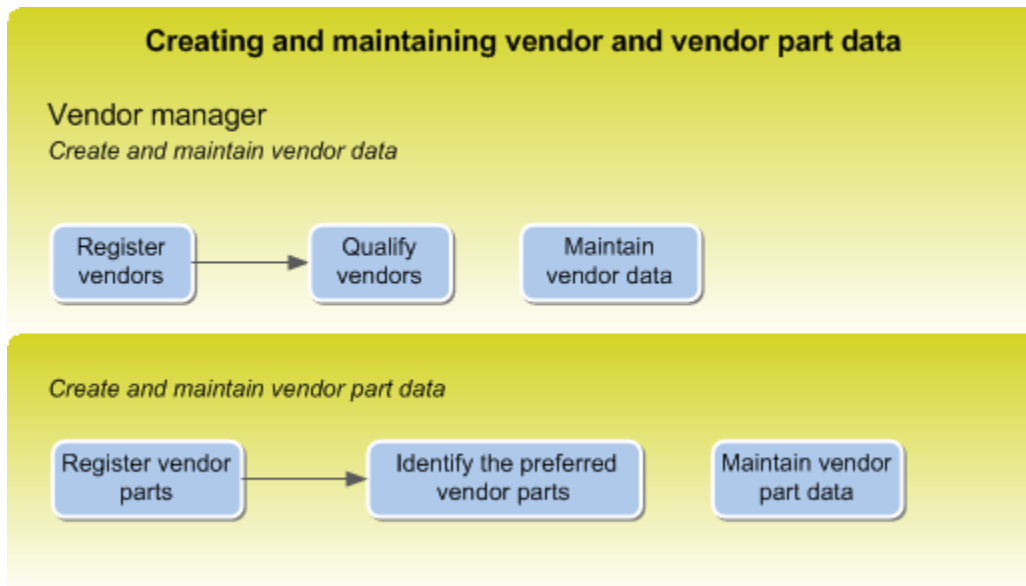
You may use Vendor Management with Teamcenter Client for Microsoft Office to import vendor data in bulk as a spreadsheet, using Microsoft Excel.

- Teamcenter Integration Framework

You can optionally use Vendor Management with Teamcenter Integration Framework for exchanging vendor data with Supplier Collaboration.

2. Creating and maintaining vendor and vendor part data

Creating and maintaining vendor and vendor part data: process overview and user role



The user role that creates and maintains vendor and vendor part data is:

| User role | Description | Tasks |
|----------------|---|---|
| Vendor manager | <p>Manages the vendor process from requests through selection. Oversees the entire Vendor Management process.</p> <p>Tasks include:</p> <ul style="list-style-type: none"> Registering vendors, creating vendor parts, managing make/buy decisions, and importing vendor bulk data. Deciding the workflow process to be used for the bid process, creating bid packages, submitting the bid to a workflow, conducting bid review meetings, and monitoring the bid | <p>Register vendors</p> <p>Qualify vendors</p> <p>Maintain vendor data</p> <p>Register vendor parts</p> <p>Identify preferred vendor parts</p> <p>Maintain vendor part data</p> |

| User role | Description | Tasks |
|---------------------|---|-------|
| | <p>progress and making improvements to it.</p> <ul style="list-style-type: none"> Coordinating the status of the vendor parts according to the decision of reviewers and participating in the workflow. | |
| Procurement officer | <p>Manage procurement of parts from vendors once the vendor parts have been chosen.</p> <p>Tasks include:</p> <ul style="list-style-type: none"> Set the status of vendor parts so Designers know the preferred parts to use Keep list of vendor parts up to date Work with vendors on price, part requirements, and engineering change orders | |

Registering new vendors

Workflow for registering vendors

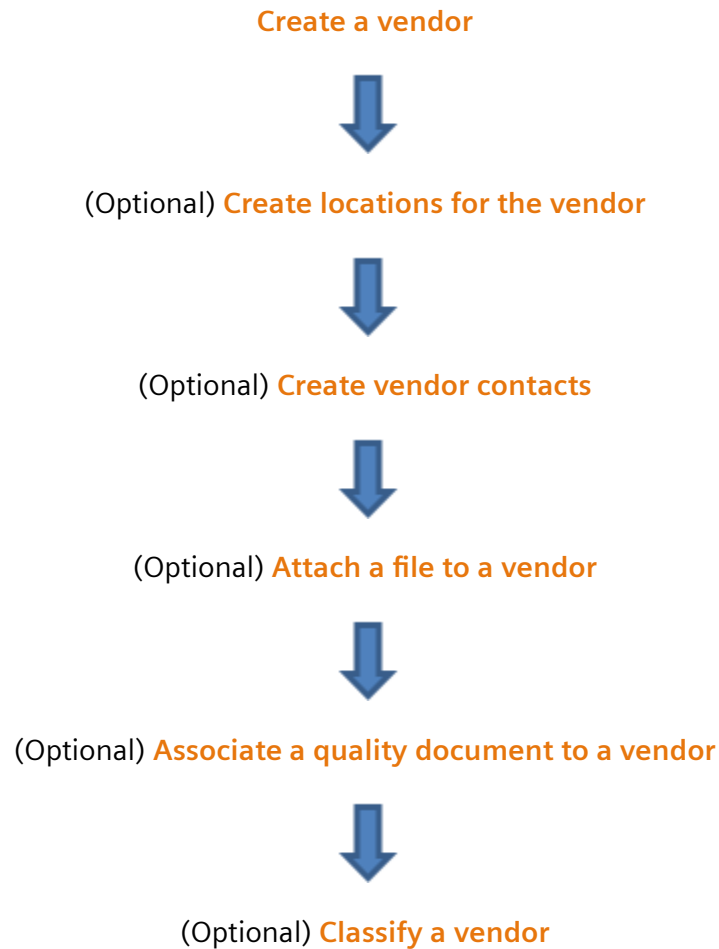
In the **Nanobox example**, Bestparts and Goodparts are the potential vendors for housings, and Patriot is the potential vendor for connectors. You create these new vendors and associate locations with them. For example, Bestparts operates from Denver, CO, USA and Pontiac, MI, USA, and Nuremberg in Germany. Goodparts is located at Troy, MI, USA, and in Hanover, Germany. Patriot is located at Lincoln, NE, USA and Mexico City in Mexico.

Your purchasing department is working with Bob from Bestparts, Gene from Goodparts, and Penny from Patriot. They are your supplier contacts for these firms.

You can follow the sequence of steps given below to create the new vendors, that is, Bestparts, Goodparts, and Patriot, in Vendor Management. To set up vendor information for new vendors, associate the vendors with their locations. Create Bob, Gene, and Penny as vendor contacts for Bestparts, Goodparts, and Patriot, respectively.

Optionally, you can attach quality documents to a vendor, and add files of a supported type by attaching a dataset to a vendor. For example, you may attach the market research performed to identify the vendor or attach other documents as required by your organization.

The workflow to register new vendors in Vendor Management is as follows:

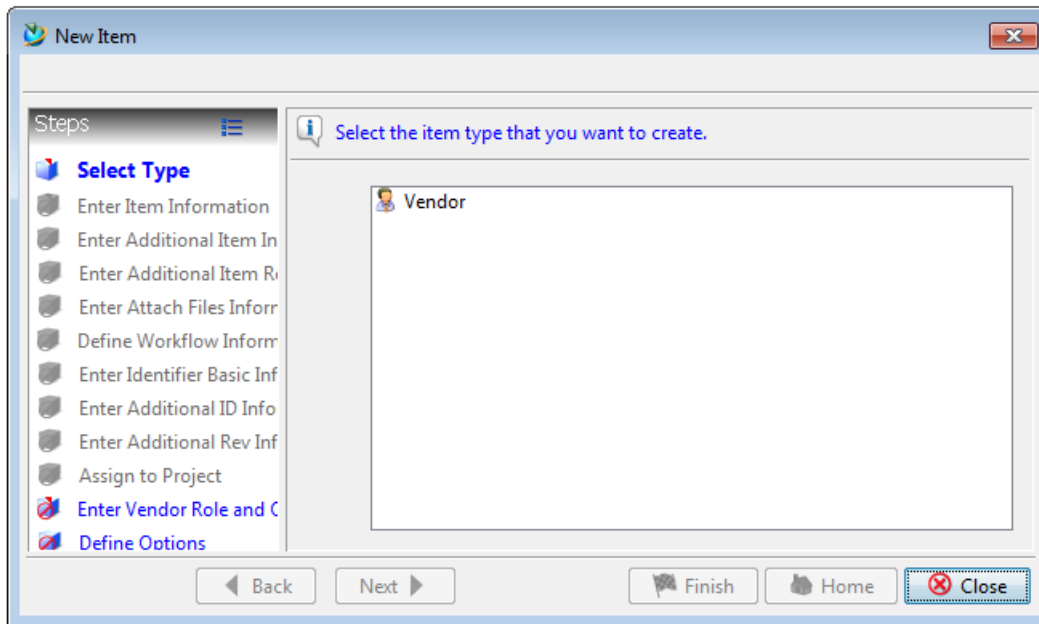


Note:

When you use Vendor Management with Supplier Collaboration, you can classify vendors and vendor parts into categories defined by your organization using the Teamcenter Classification application. This helps to quickly identify vendors for a particular category of parts, for example, plastics.

Create a vendor

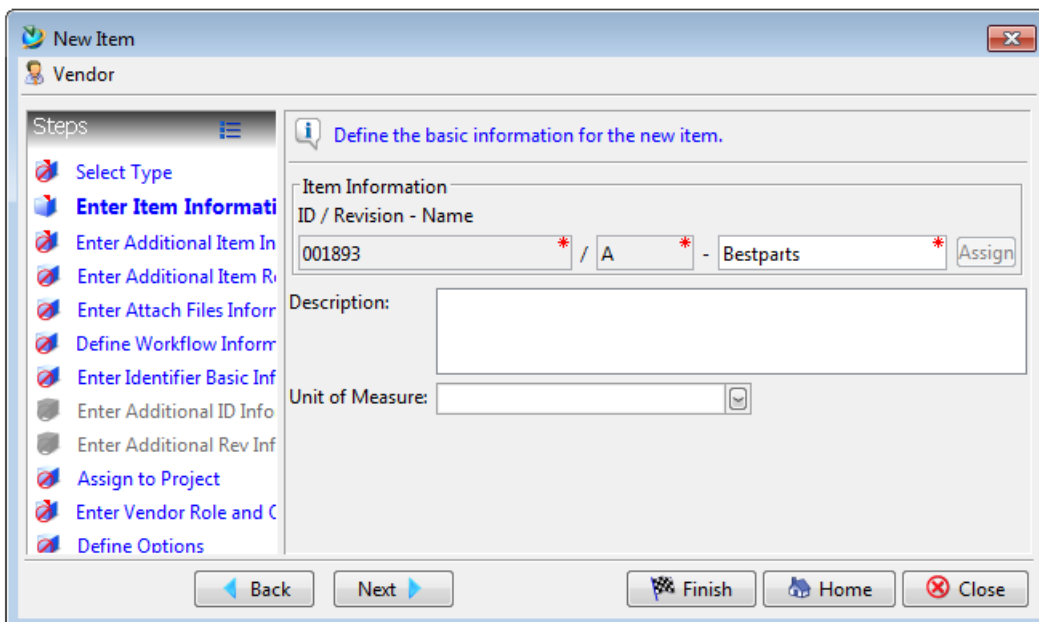
1. In My Teamcenter, choose **File**→**New**→**Vendor Management**→**Vendor**.



2. In the **New Item** dialog box, in the **Select Type** step, select **Vendor** and click **Next**.
3. In the **Enter Item Information** step, type values for **ID / Revision**, **Name**, an optional **Description**, and **Unit of Measure**, and click **Next**.

Note:

You can click **Assign** to automatically generate **ID** and **Revision**.



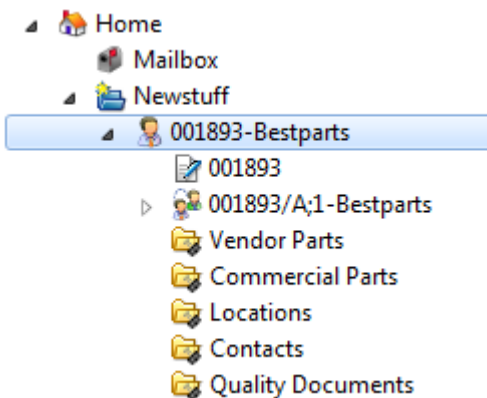
- (Optional) In the **Enter Additional Item Information** step, you can specify vendor contact information such as **Address, Contact, Email, Phone, and Web Site**. Click **Next**.

The screenshot shows a 'New Item' dialog box for a 'Vendor'. The 'Steps' pane on the left lists the following steps: Select Type, Enter Item Information, **Enter Additional Item Information** (highlighted), Enter Additional Item R..., Enter Attach Files Infor..., Define Workflow Inform..., Enter Identifier Basic Inf, Enter Additional ID Info, Enter Additional Rev Inf, Assign to Project, Enter Vendor Role and C, and Define Options. The main area of the dialog box contains a form with the following fields: Address, Contact, Email, and IMDS Extended Name. The 'Finish' button is highlighted with a dashed border.

- Provide additional attribute values as needed and click **Finish** to create the vendor.

Click **Close** to close the dialog box.

When you create a vendor, the system creates organizational folders called pseudofolders 📁 to display the related commercial parts and vendor parts.



Create a company location

- In My Teamcenter, open the vendor and select the **Locations** folder.
- Choose **File→New→Other**.

The system displays the **New Business Object** dialog box.

3. Select **Company Location** from the list of business objects and click **Next**.
4. Type the values for **Name** (required) and the following optional fields:

- **Location Code**
- **Location Type**

Select a value from the menu for **Location Type**:

- CAGE/Commercial and Government Entity
- GLN/Global Location Number
- **Street**
- **City**
- **State/Province**
- **Postal Code**
- **Country**
- **Region**
- **URL**
- **Description**

The screenshot shows a software window titled "New Business Object" with a subtitle "Object Create Information". The main heading is "Company Location" and the subtitle is "Define business object create information". The "Properties" section is expanded to show the following fields:

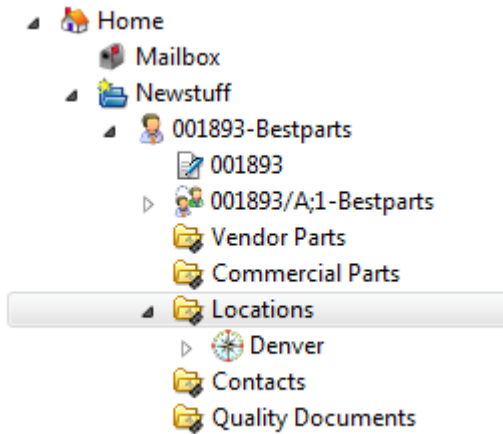
| | |
|-------------------|------------------|
| Name: | Denver |
| Location Code: | D2345 |
| Location Type: | GLN |
| Street: | 1730 16th Street |
| City: | Denver |
| State / Province: | Colorado |
| Postal Code: | 80227 |
| Country: | USA |
| Region: | |
| URL: | |

At the bottom, there is a "Relation" dropdown menu, an "Open On Create" checkbox, and four buttons: "< Back", "Next >", "Finish", and "Close".

5. Click **Finish** to create a company location.


Click **Close** to close the dialog box.

The company location is created under the selected **Locations** folder.

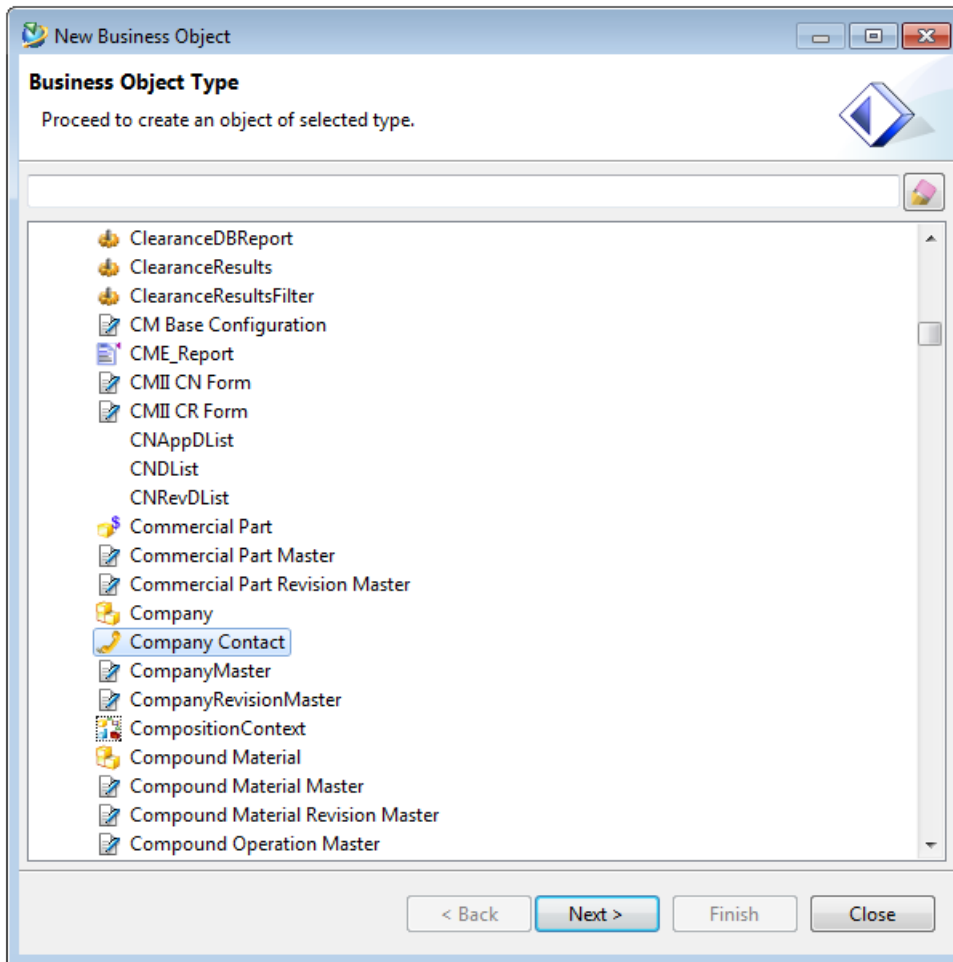


If you do not select the **Locations** folder for a vendor when creating a company location, the company location is created independently and not related to the vendor. In such a case, to relate the company location to a vendor, drag the company location to the **Locations** folder of the vendor.

Create a vendor contact

1. In My Teamcenter, select the **Contacts** pseudofolder  for a vendor or company location.
2. Choose **File**→**New**→**Other**.

Select **Company Contact** from the list of business objects and click **Next**.



The system displays the **New Business Object** dialog box.

3. Specify the required information in the New Business Object dialog box.

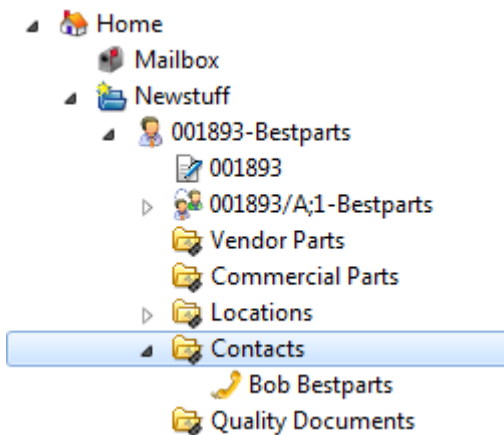
The screenshot shows a 'New Business Object' dialog box with the following fields and values:

| Field | Value |
|------------------|-----------------------------|
| Title | Mr. |
| First Name* | Bob |
| Last Name* | Bestparts |
| Suffix | |
| Phone (Business) | 94-11-5481220 Ext. 1123 |
| Phone (Home) | |
| Phone (Mobile) | 876543210 |
| Fax | |
| Pager | |
| Email | bob.bestparts@bestparts.com |
| Description | |

At the bottom of the dialog, there is a 'Relation' dropdown menu, an 'Open On Create' checkbox, and four buttons: '< Back', 'Next >', 'Finish', and 'Close'.

- Click **Finish** to create a contact and click **Close** to close the dialog box.

The company contact is created under the selected **Contacts** folder.



The system creates the contact object and associates it to the selected vendor or company location using the **ContactInCompany** relation. To view the relation created, right-click the contact, and select **Properties On Relation**. The **Relation Type** is displayed as **ContactInCompany**.

Note:




If you do not select the **Contacts** folder for a vendor when creating a company contact, the company contact is created independently and not related to the vendor. In this case, to relate the company contact to a vendor, drag the company contact to the **Contacts** folder of the vendor.

If you have installed Substance Compliance, you must add this contact either as material substance declaration (MSD) contact or conflict mineral declaration (CMD) contact. The supplier declarations are sent to the MSD or CMD contact when the compliance officer requests for material and substance information.

To create a MSD or CMD contact:

1. Copy the company contact.
2. Select the vendor and click **Edit→Paste Special**.
3. In the **Paste Special** dialog box, select **CMD Contacts** or **MSD Contacts**.
4. Click **OK**.

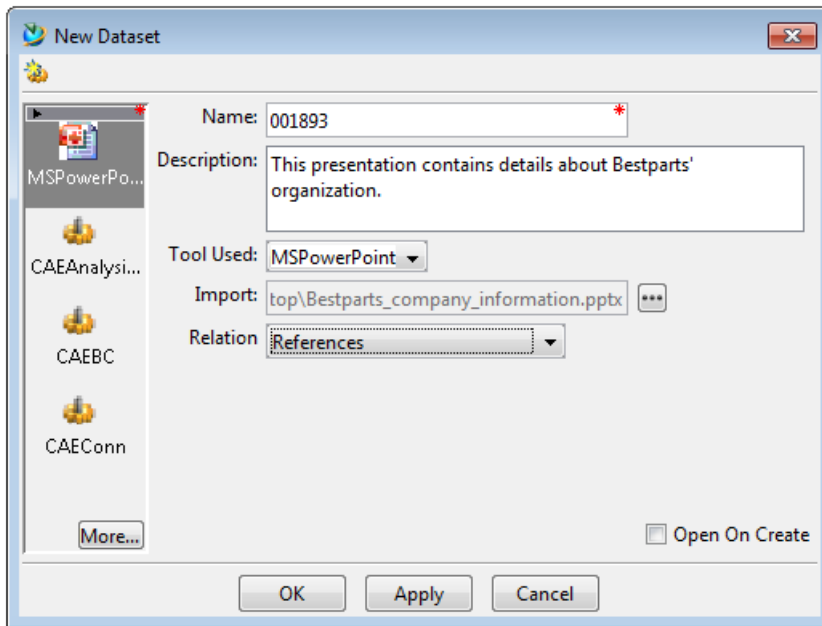
Relate a vendor contact to a vendor location

1. In My Teamcenter, select the vendor and expand the **Contacts**  pseudofolder.
2. Open the **Locations** pseudofolder  under the vendor.
3. Drag the vendor contact from the **Contacts** pseudofolder  to the specific vendor location. For example, if you have a vendor contact named **John Doe**, you can drag the contact to the **Plano** pseudofolder.

Attach a file to a vendor, vendor part, or commercial part

You can attach files of supported data types to Vendor Management objects such as a vendor, vendor part, or commercial part with the standard specified relations. Vendor Management provides pseudofolders named **Vendor Parts**, **Commercial Parts**, **Locations**, **Contacts**, and **Quality Documents** to attach the relevant documents.

1. Select a Vendor Management object such as a vendor, vendor part, or commercial part.
2. Choose **File→New→Dataset**.

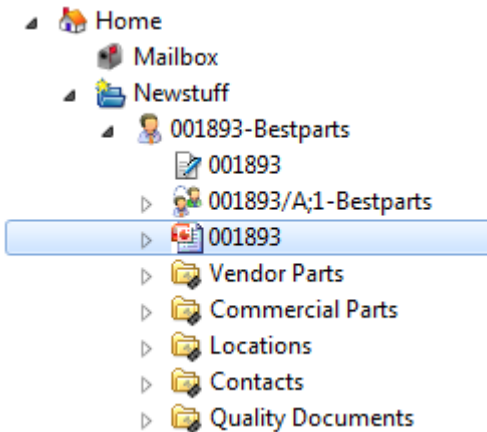


3. In the New Dataset dialog box, type a **Name** for the new dataset. Additionally, specify the **Description**.

Select the type of file you want to attach from the **Tool Used** list or from the types displayed in the left panel. Click **More...** in the left panel to view all the supported file types. The file type you select is displayed in the left panel.

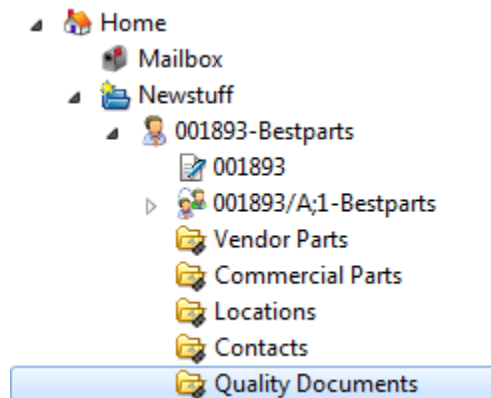
4. Click the (...) ellipsis button next to the **Import** field. In the **Upload File** dialog box, browse to select the file and click **Upload**. Ensure that you select the same type of file as selected in the previous step.
5. In the **Relation** list, select a relation that best describes what the file is. For example, if you are attaching company information for your reference, you can select **Reference** as the **Relation**, or if you are attaching quality documents for a particular vendor, select **Quality Documents** as the **Relation**.

The dataset is displayed under the selected pseudofolder.



Associate a quality document to a vendor

Place any object in the **Quality Documents** pseudofolder  to relate it to the vendor.



Classify a vendor

1. Select the vendor.
2. Right-click and choose **Send To**→**Classification**.
 - If the vendor is already classified, you can view the classification parameters.
 - If the vendor is not already classified, you must select a relevant class.
3. Expand the **Classification Root** and navigate to the appropriate category.
4. In the **Properties** tab, select the appropriate **Vendor Status**.
5. Specify up to three **Vendor Contact Roles** for the vendor from the three lists provided, and click **Save**.

Qualifying vendors

After identifying potential suppliers, you may register them in Teamcenter. In Teamcenter you create a vendor object for each vendor to store all relevant information.

After registering the potential vendors in Teamcenter, follow your organizational process to qualify vendors. As part of the basic qualification process, you may perform a background check and review the integrity and qualification of the vendor. Further, you may request vendors to provide information on management system certificates or on corporate responsibility. You also request your vendors to provide their consent to your organization's code of conduct. The vendor selection process may involve gathering pertinent information from vendors, using questionnaires or forms, interviews, or site visits. You assess various aspects of a vendor's business such as production capacity, financial data, product and process quality, performance, adherence to environment and safety regulations, business stability and sustainability, and risk evaluation. A vendor is scored based on these aspects and selected if the score is acceptable. The status of a vendor qualified in this way is changed to **approved**. You can now award the business to an approved vendor. Typically, businesses maintain a list of approved vendors (Approved Vendor List, AVL).

Optionally, you may choose to register a supplier only after the supplier successfully passes the qualification process.

Maintaining vendor data

Tasks involved in maintaining vendor data

Maintenance tasks may involve updating vendors, vendor roles, the company, or vendor contact (company contact) information.

| Updating vendor information | Updating company information | Updating vendor contact information |
|-----------------------------|----------------------------------|-------------------------------------|
| Edit vendor properties | Add a company location | Add a company contact |
| Add or remove a vendor role | Edit company location properties | Edit a company contact |
| Delete a vendor | Delete a location | Delete a contact |

In the **Nanobox example**, you have created vendors and set up the basic vendor information in Vendor Management. Further, you have qualified the vendors. However, there may be changes in the business environment that require corresponding updates to vendor data.

For example:

- Although Goodparts passed your vendor qualification process and is a qualified supplier for housings, they have decided to stop manufacturing housings.

In this case, you would remove Goodparts as the housing supplier and look for other suppliers to supply housings.

- Bestparts shuts down operations in Denver, CO, to move to a new location.

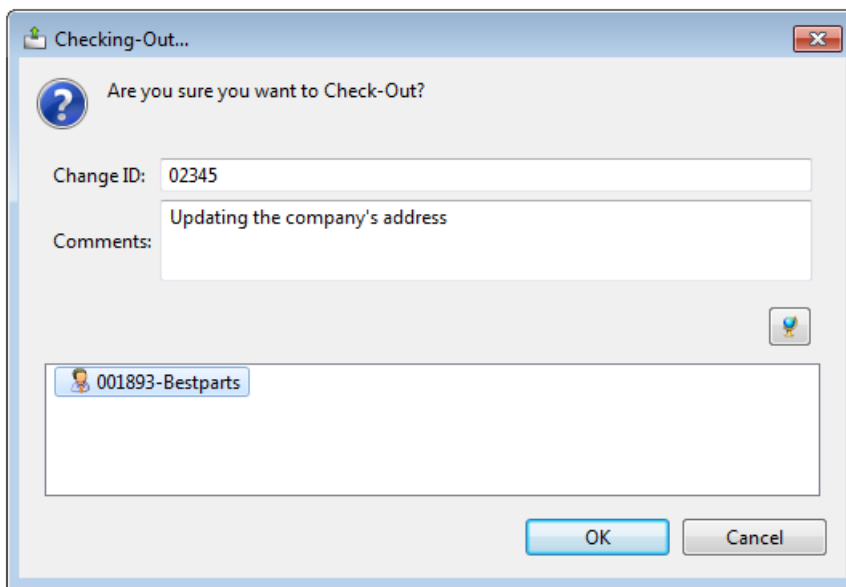
In this scenario, you would update the vendor location.

- Penny leaves Patriot and moves to another organization.

In this case, Patriot nominates someone else as the vendor contact for your organization. You must then create a new vendor contact to replace Penny.

Edit vendor properties

1. Right-click the required vendor and select **Edit Properties**.
2. In the **Checking-Out...** dialog box, specify a **Change ID** and **Comments**, and click **OK**.




3. In the **Edit Properties** dialog box, edit the properties and click **Save and Check-In**.

The screenshot shows the 'Edit Properties' dialog box for a Vendor. The 'Object' field contains '001893-Bestparts'. The 'Name' field contains 'Bestparts'. The 'Address' field contains '3540 Commercial Street, Central Point'. The 'Contact' and 'Phone' fields are empty. The 'General' tab is selected, and the 'Save and Check-In' button is highlighted.

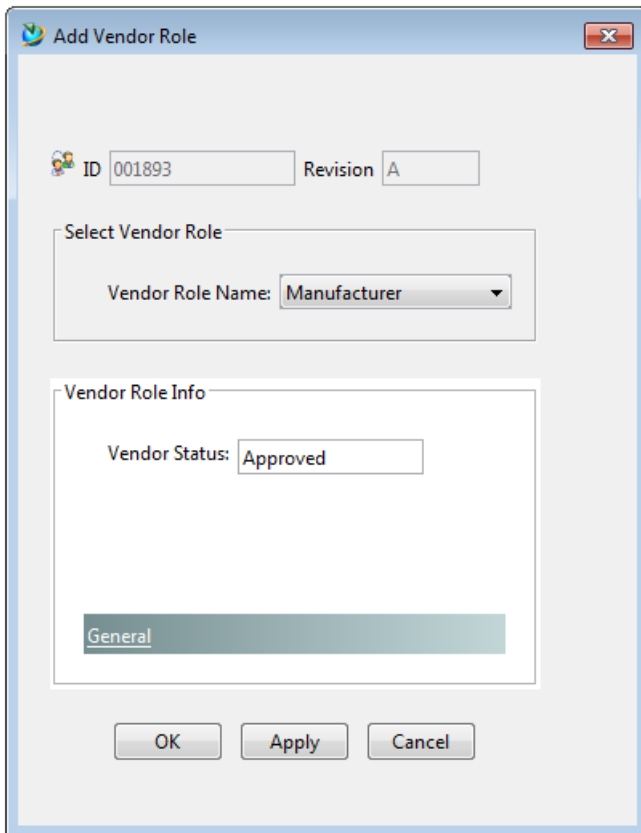
- In the **Checking-In...** dialog box, select the vendor, and click **OK**.

The screenshot shows the 'Checking-In...' dialog box. The dialog asks 'Are you sure you want to Check-In?'. A list of vendors is shown, with '001893-Bestparts' selected. The 'OK' button is highlighted.

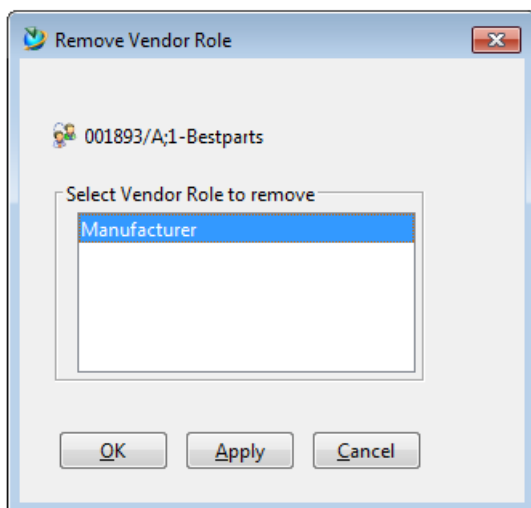
Assign a role to a vendor or remove a role assigned to a vendor

You must not modify vendor roles using the standard Edit Properties dialog box. Add or remove a vendor role such as **Manufacturer**, **Distributor**, or **Supplier**, from a **Vendor** revision object  as follows:

1. In My Teamcenter, select a **Vendor** revision object.
2. Use the **Tools**→**Vendor Management** menu to choose **Add Vendor Role** or **Remove Vendor Role**.



The screenshot shows the 'Add Vendor Role' dialog box. At the top, it has a title bar with a close button. Below the title bar, there are two input fields: 'ID' with the value '001893' and 'Revision' with the value 'A'. Below these fields is a section titled 'Select Vendor Role' containing a dropdown menu labeled 'Vendor Role Name' with 'Manufacturer' selected. Below that is a section titled 'Vendor Role Info' containing a text field labeled 'Vendor Status' with the value 'Approved'. At the bottom of the dialog, there are three buttons: 'OK', 'Apply', and 'Cancel'. A 'General' tab is visible at the bottom of the 'Vendor Role Info' section.



The screenshot shows the 'Remove Vendor Role' dialog box. At the top, it has a title bar with a close button. Below the title bar, there is a text field containing the vendor ID and revision: '001893/A;1-Bestparts'. Below this field is a section titled 'Select Vendor Role to remove' containing a list box with 'Manufacturer' selected. At the bottom of the dialog, there are three buttons: 'OK', 'Apply', and 'Cancel'.


3. Select the appropriate vendor role and click **OK**.

Delete a vendor

1. In My Teamcenter, select the vendor you want to delete.
2. Choose **Edit→Delete**.

When a vendor is deleted, the associated locations and contacts are also deleted.

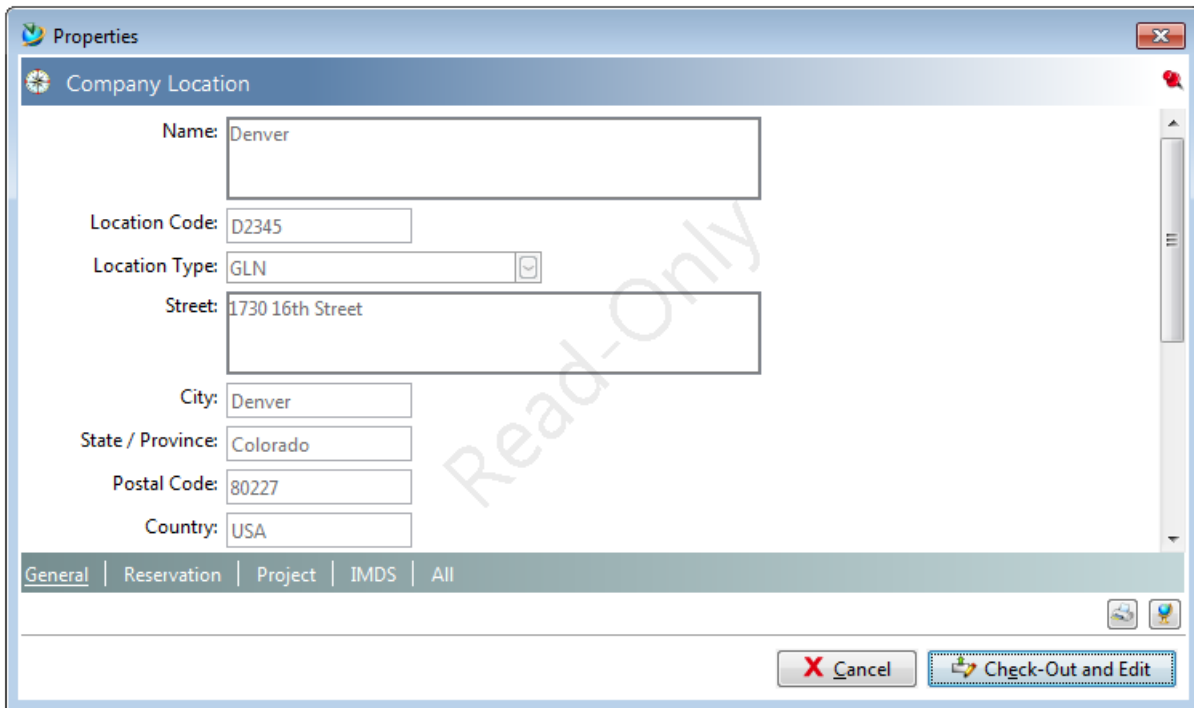
Edit company location properties

1. In My Teamcenter, select the **Company Location** object .

Note:

Checkin and checkout do not provide any revision mechanism for locations.

2. Choose **View→Properties**.

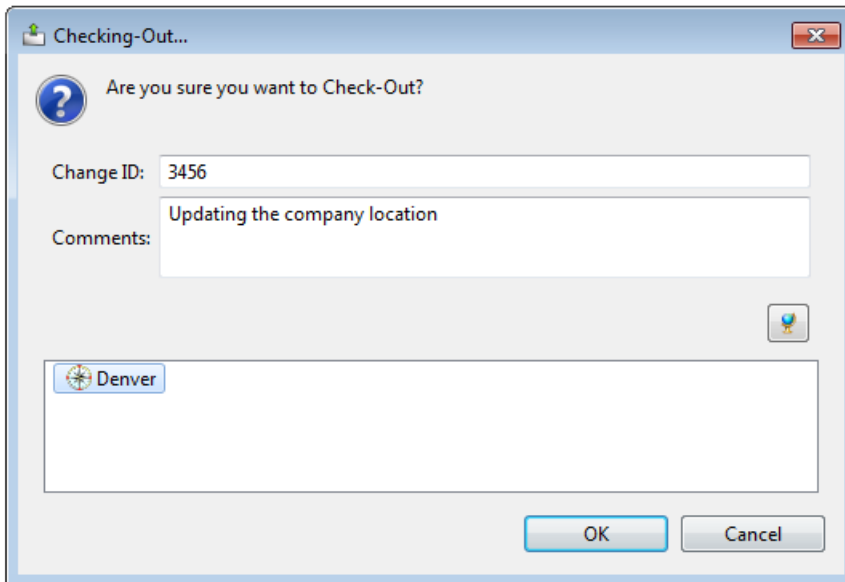


The screenshot shows a 'Properties' dialog box for a 'Company Location'. The fields are as follows:

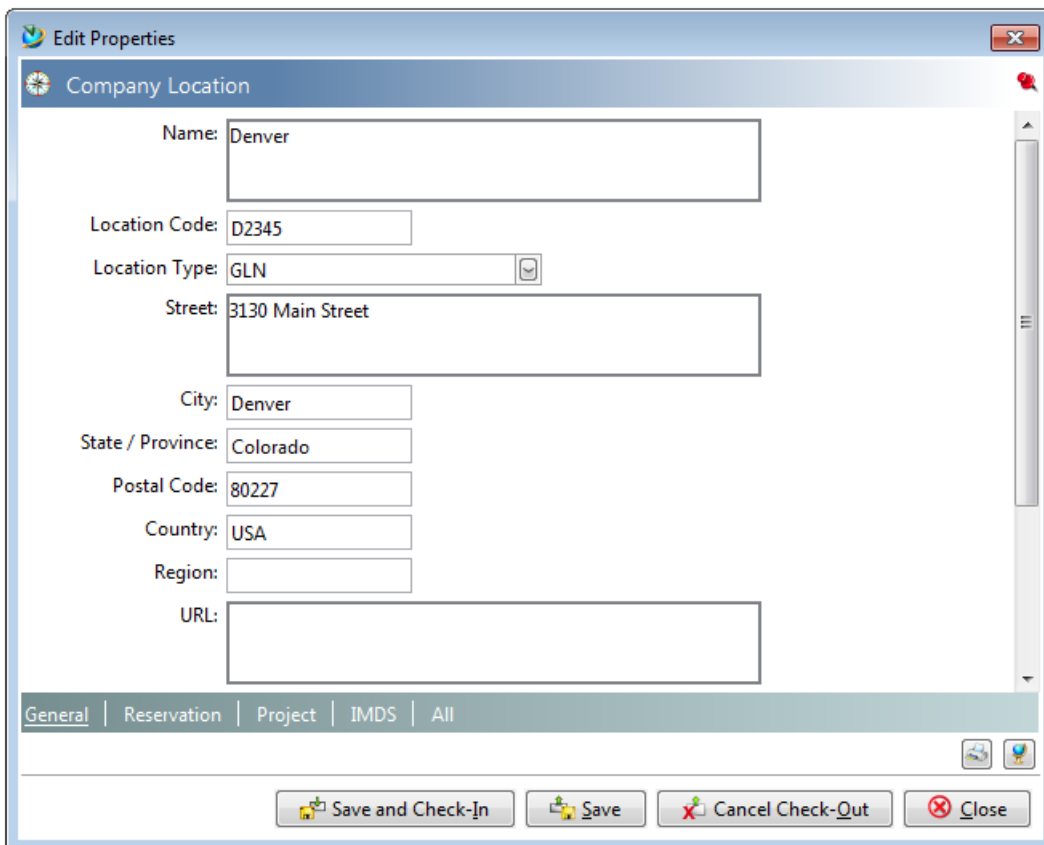
| | |
|-------------------|------------------|
| Name: | Denver |
| Location Code: | D2345 |
| Location Type: | GLN |
| Street: | 1730 16th Street |
| City: | Denver |
| State / Province: | Colorado |
| Postal Code: | 80227 |
| Country: | USA |

At the bottom of the dialog, there are tabs for 'General', 'Reservation', 'Project', 'IMDS', and 'All'. Below the tabs are two buttons: 'Cancel' and 'Check-Out and Edit'.

3. In the **Properties** dialog box for the company location, click **Check-Out and Edit**.
4. In the **Checking-Out...** dialog box, specify the **Change ID**, **Comments**, and select the vendor. Click **OK**.



5. In the **Properties** dialog box, edit the properties of the location.



6. Click **Save and Check-In** to check in the object.

Delete a location

1. In My Teamcenter, expand the **Locations** folder under a vendor.
2. Select the location you want to delete.
3. Choose **Edit→Delete**.

This removes the location from the list of associated locations for the vendor from the database.

Edit a company contact

1. In My Teamcenter, select the **Company Contact** object.

Note:

Checkin and checkout do not provide any revision mechanism for the company contact. When a property is updated, it overwrites the object with the new value.

2. Choose **View→Properties**.
3. In the **Properties** dialog box for the company contact, click **Check-Out and Edit**.

The screenshot shows a 'Properties' dialog box for a 'Company Contact'. The dialog has a title bar with 'Properties' and a close button. Below the title bar is a tabbed interface with 'Company Contact' selected. The form contains the following fields:

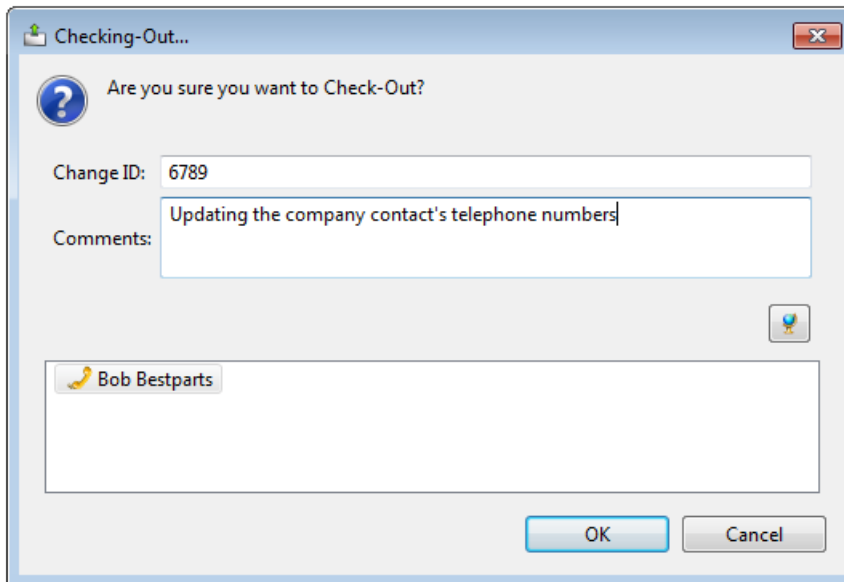
- Name: Bob Bestparts
- Title: Mr. (with a dropdown arrow)
- First Name: Bob
- Last Name: Bestparts
- Suffix: (empty)
- Phone (Business): 94-11-5481220 Ext. 1123
- Phone (Home): (empty)
- Phone (Mobile): 876543210
- Fax: (empty)
- Pager: (empty)
- Email: bob.bestparts@bestparts.com
- Description: (empty)
- Type: Company Contact (with a dropdown arrow)

Below the form, there are three fields for user information:

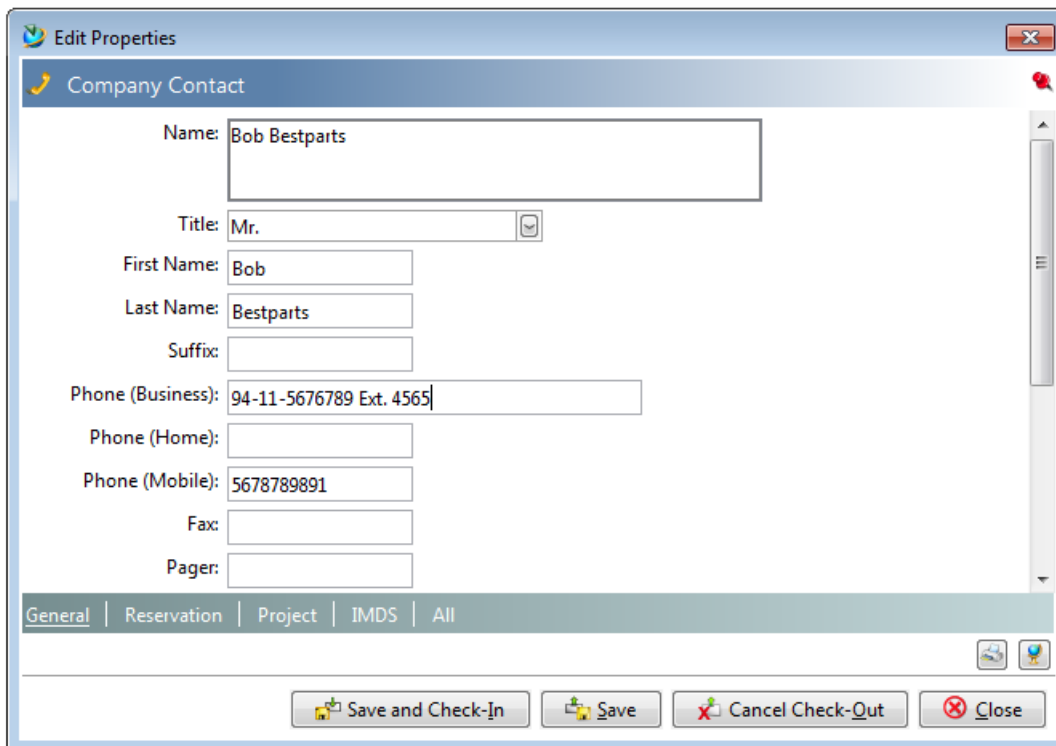
- Owner: Holly (holly) (with a dropdown arrow)
- Group ID: Engineering (with a dropdown arrow)
- Last Modifying User: Holly (holly) (with a dropdown arrow)

At the bottom of the dialog, there is a tabbed interface with 'General' selected, and two buttons: 'Cancel' and 'Check-Out and Edit'.

4. In the **Checking-Out...** dialog box, specify the **Change ID, Comments**, and select the vendor. Click **OK**.



5. In the **Edit Properties** dialog box of the company contact, update the details.



6. Click **Save and Check-In** to check in the object.

Delete a contact

1. In My Teamcenter, expand the **Contacts** folder.

2. Select the contact you want to delete.
3. Choose **Edit**→**Delete**.

This removes the contact from the list of associated contacts in the database.

Registering new vendor parts

Workflow for registering vendor parts

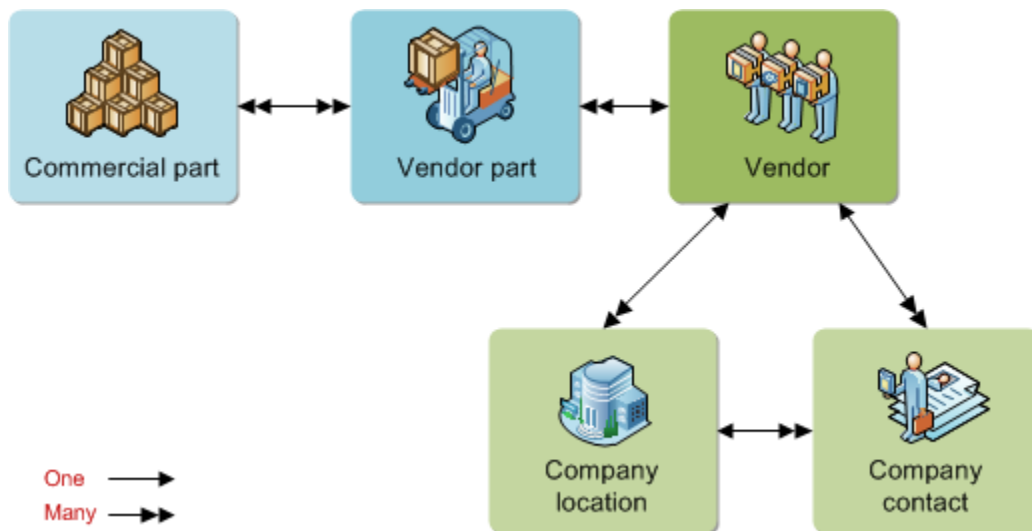
Continuing with the **Nanobox example**, let us assume that you have decided to outsource the Nanobox connector and housing.

In the part structure for the Nanobox, the design engineers have created commercial parts to represent the connector and housing to be sourced from suppliers. You can create vendor parts to represent the connector and housing and relate them to the commercial parts that represent the housing and connector. Alternatively, you may include the vendor parts in the part structure directly. You must create a vendor part for the housing supplied by Bestparts and a different one for that supplied by Goodparts.

You can relate a location to a vendor part to indicate the manufacturing location. By doing so, you can choose a vendor part that is manufactured closer to your manufacturing plant. For example, you may choose to mark Bestpart's housing from Nuremberg as a preferred part over Goodparts' housing from Hanover for your manufacturing plant in Stuttgart, Germany.

Similarly, you can mark parts manufactured in your country as preferred parts for that plant.

You can create a vendor part that is related to a commercial part included in the part structure. Alternatively, you can create a vendor part that is directly included in the part structure.



The workflow for registering new vendor parts in Vendor Management is as follows:

Create a vendor part



(Optional) Relate a vendor part to a commercial part



(Optional) Relate a vendor part to a location



(Optional) Attach a file to a commercial part or vendor part

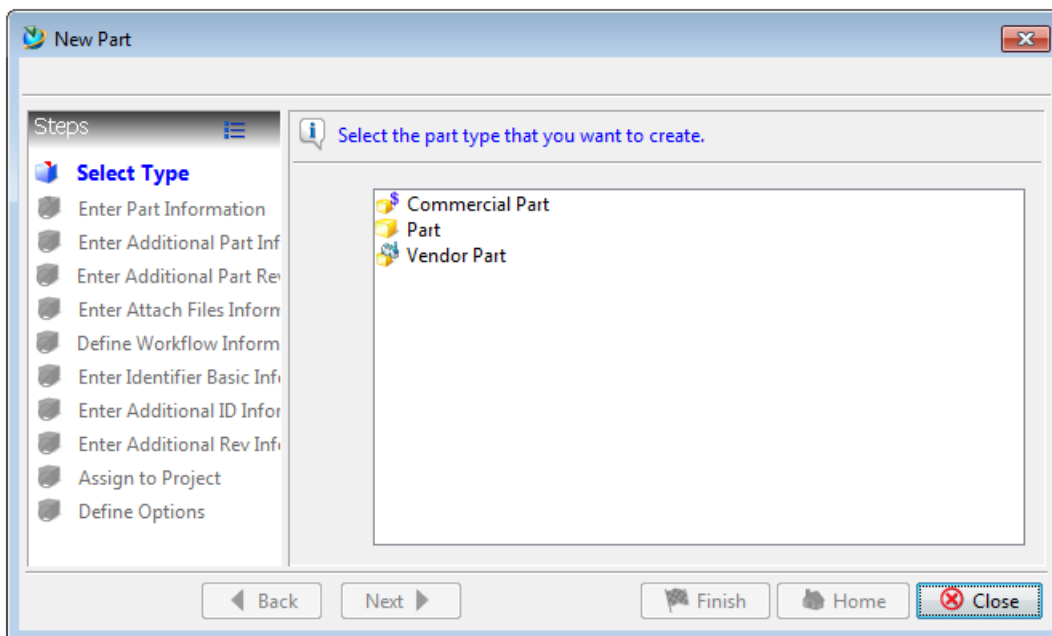


(Optional) Classify commercial parts and vendor parts

Create a vendor part

1. In My Teamcenter, select a folder and choose **File**→**New**→**Part**.

The system displays the **New Part** dialog box.



Note:


To create a vendor part associated to a commercial part, select the **Vendor Parts** folder under a **Commercial Part Revision** object and choose **File→New→Part**. The vendor part you create is related to the selected revision of the commercial part.

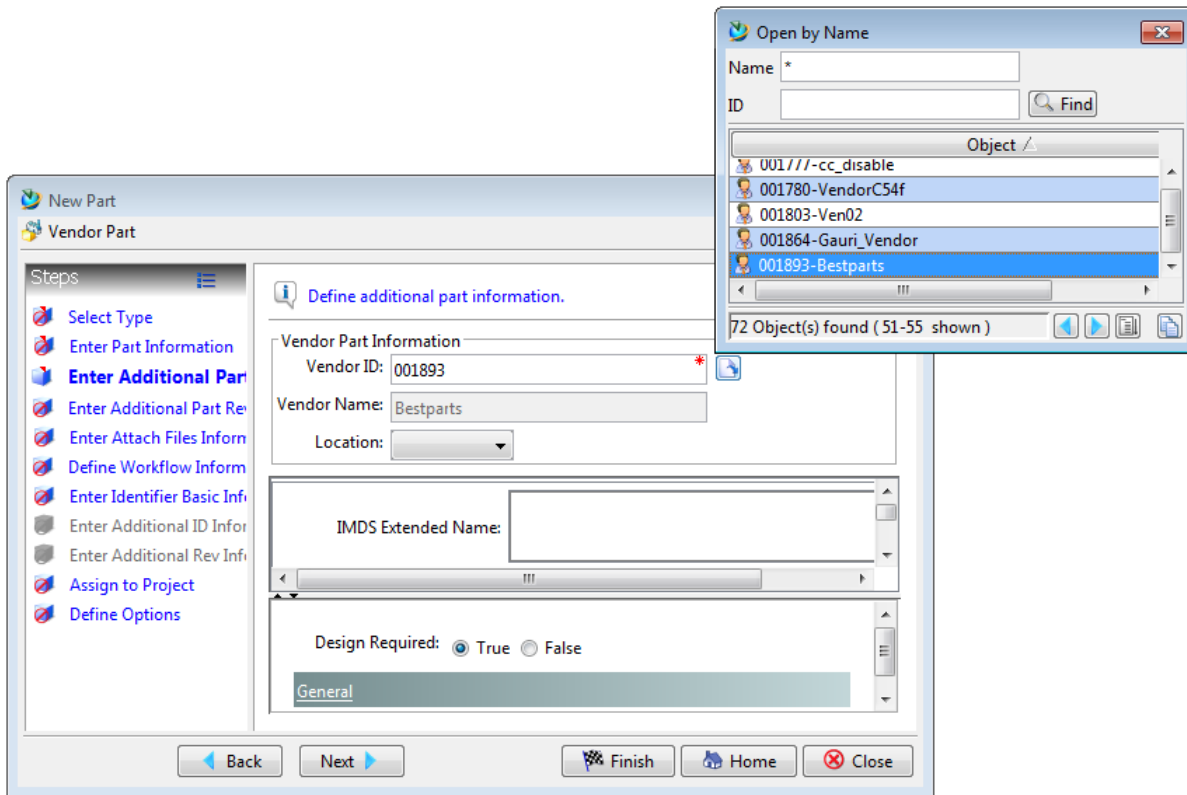
2. Select **Vendor Part** and click **Next**.
3. In the **Enter Part Information** step, type values for **ID / Revision - Vendor Part Name**, or click **Assign** to assign an ID and revision. Click **Next**.

The screenshot shows the 'New Part' dialog box with the following details:

- Title:** New Part
- Step:** Vendor Part
- Steps List:**
 - Select Type
 - Enter Part Information** (selected)
 - Enter Additional Part Inf
 - Enter Additional Part Re
 - Enter Attach Files Inform
 - Define Workflow Inform
 - Enter Identifier Basic Inf
 - Enter Additional ID Infor
 - Enter Additional Rev Inf
 - Assign to Project
 - Define Options
- Part Information:**
 - ID / Revision - Vendor Part Name:** 001898 * / A * - Housing_Bestparts * [Assign]
 - Description:** This part represents housing supplied by Bestparts.
 - Unit of Measure:** [Dropdown menu]
- Navigation:** Back, Next, Finish, Home, Close

4. In the **Enter Additional Part Information** step, specify the **Vendor ID**, **Vendor Name**, and **Location**.

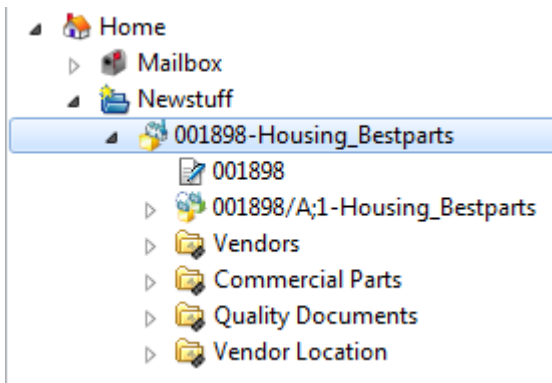
To choose a vendor from a list, click the  button next to the **Vendor ID** text box. In the **Open by Name** dialog box that is displayed, specify **Name** or **ID** as the search criteria and click the **Find** button. From the search results, double-click the required vendor.



- In the subsequent steps, provide additional attribute values as needed, and click **Finish** to create the vendor part object.

Click **Close** to close the dialog box.


When you create a vendor part, information about related vendors, commercial parts, quality documents, and vendor locations is organized into folders that the system creates. These organizational folders are called pseudofolders.



Note:

If you do not select the **Vendor Parts** folder under a **Commercial Part Revision** when creating a vendor part, the vendor part is created independently and not related to the commercial part revision. In such a case, to relate the vendor part to a commercial part revision, drag-the vendor part to the **Vendor Parts** folder of the commercial part revision.

Relate a location to an existing vendor part

1. In My Teamcenter, select the **Locations** folder in the **Vendors** folder under a vendor part.
2. Drag a location from the vendor to the **Provide From Locations** folder  of the vendor part.

Relate a vendor part to a commercial part

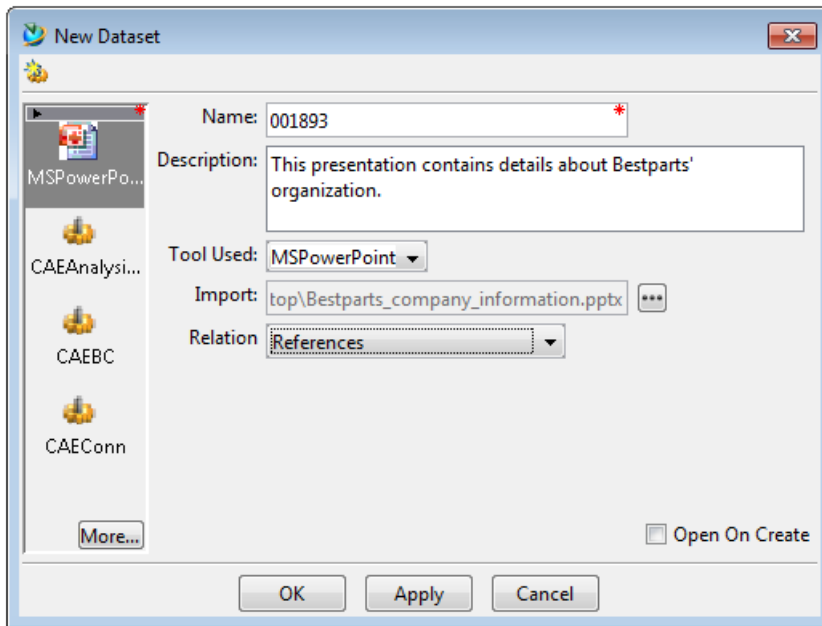
Associate a **Vendor Part** object  to a **Commercial Part** revision object  as follows:

1. In My Teamcenter, select a **Commercial Part** revision.
2. Drag a vendor part to the **Vendor Parts** folder of the **Commercial Part** revision.

Attach a file to a vendor, vendor part, or commercial part

You can attach files of supported data types to Vendor Management objects such as a vendor, vendor part, or commercial part with the standard specified relations. Vendor Management provides pseudofolders named **Vendor Parts**, **Commercial Parts**, **Locations**, **Contacts**, and **Quality Documents** to attach the relevant documents.

1. Select a Vendor Management object such as a vendor, vendor part, or commercial part.
2. Choose **File**→**New**→**Dataset**.

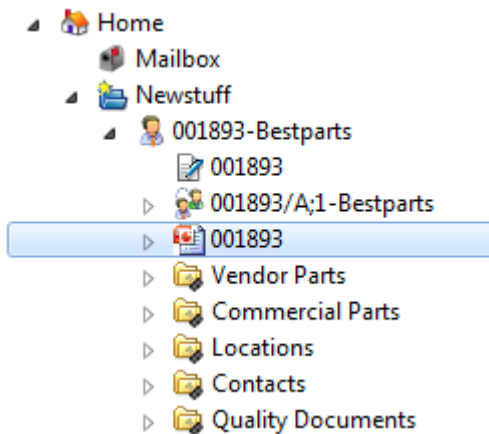


3. In the New Dataset dialog box, type a **Name** for the new dataset. Additionally, specify the **Description**.

Select the type of file you want to attach from the **Tool Used** list or from the types displayed in the left panel. Click **More...** in the left panel to view all the supported file types. The file type you select is displayed in the left panel.

4. Click the (...) ellipsis button next to the **Import** field. In the **Upload File** dialog box, browse to select the file and click **Upload**. Ensure that you select the same type of file as selected in the previous step.
5. In the **Relation** list, select a relation that best describes what the file is. For example, if you are attaching company information for your reference, you can select **Reference** as the **Relation**, or if you are attaching quality documents for a particular vendor, select **Quality Documents** as the **Relation**.

The dataset is displayed under the selected pseudofolder.



Classify commercial and vendor parts

When you use Vendor Management with Supplier Collaboration, you can classify vendor parts into categories defined by your organization. This helps to quickly identify vendors for a particular category of parts, for example, plastics.

1. Select the commercial part or vendor part.
2. Right-click and choose **Send To**→**Classification**.
 - If the part is classified, the system displays the classification parameters.
 - If the part is not already classified, the system prompts you to classify it. Select the particular class where you want to classify that object.
3. Expand the **Classification Root** and navigate to the appropriate category.
4. In the **Properties** tab, select the appropriate **Vendor Status**.
5. In the **Properties** tab, specify up to three **Vendor Contact Roles** for the vendor from the three lists provided.
6. Click **Save**.

Identify preferred vendor parts

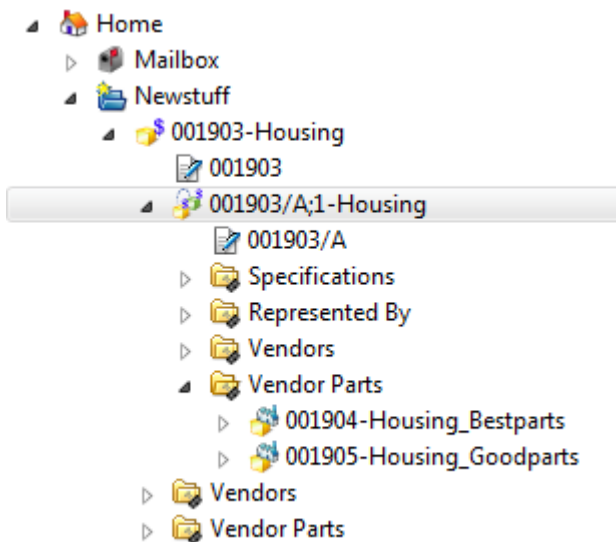
You identify preferred vendor parts and set the status of a vendor part to **preferred**, **backup**, or **obsolete**. You can set the status of one or more parts as **preferred**.

In the **Nanobox example**, you may choose to mark Bestpart's housing from Nuremberg as a **preferred** part for your manufacturing plant in Stuttgart, Germany as Nuremberg is closer to Stuttgart than Hanover, where Goodparts manufactures housing, or because the quality of parts that come from Bestpart's Nuremberg location has been consistently good. You may want to mark Goodpart's housing

as a **backup** part that you can order if Bestparts is unable to supply the required quantity or at the required time.

However, if Goodparts decides to stop manufacturing housings, you would set the status of Goodparts as **obsolete**.

1. In My Teamcenter, select a commercial part revision that has vendor parts associated with it. The associated vendor parts are in the **Vendor Parts** folder under the housing revision.



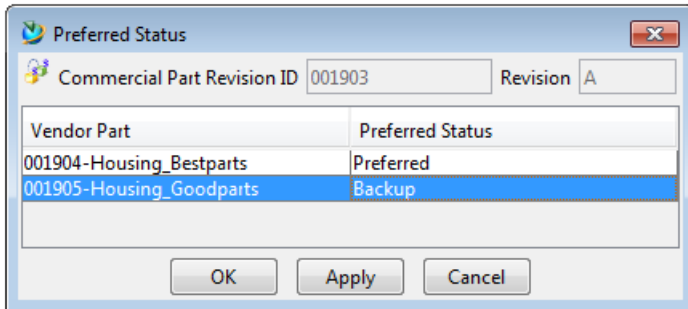
2. Choose **Tools**→**Vendor Management**→**Update Preferred Status**.

The system displays the Preferred Status dialog box.

3. In the Preferred Status column, against each vendor part, set the status of each vendor part associated with the selected commercial part revision. For example, in a standard Teamcenter installation, you can set the status to **Preferred**, **Backup**, or **Obsolete**.

Note:

The available preferred status values are configured by your administrator and you cannot enter other values.



- Click **Apply** and then click **OK**.

Maintain vendor part data

Maintaining vendor part data

The vendor manager is responsible for maintaining the vendor part information.

| Updating vendor part information | Updating the vendor | Updating the location |
|---|---------------------------------------|--------------------------------------|
| Edit vendor part properties | Copy vendor part data to a new vendor | Add a location to a vendor part |
| Relate a vendor part to a commercial part | Change the vendor of a vendor part | Remove a location from a vendor part |
| Obsolete vendor parts no longer in use | | |

In the **Nanobox example**, you have created vendors and vendor parts and set up the basic vendor and vendor part information in Vendor Management. However, there may be some changes in the business environment that require corresponding updates to vendor part data.

For example:

- Requirements for the housing have changed.

In this case, the vendor parts for the housing provided by Goodparts and Bestparts may need to be modified or you may want to obsolete them and replace them with new vendor parts.

- As Goodparts has decided to stop manufacturing housings, you have identified a new vendor, Parts and More, to replace Goodparts.

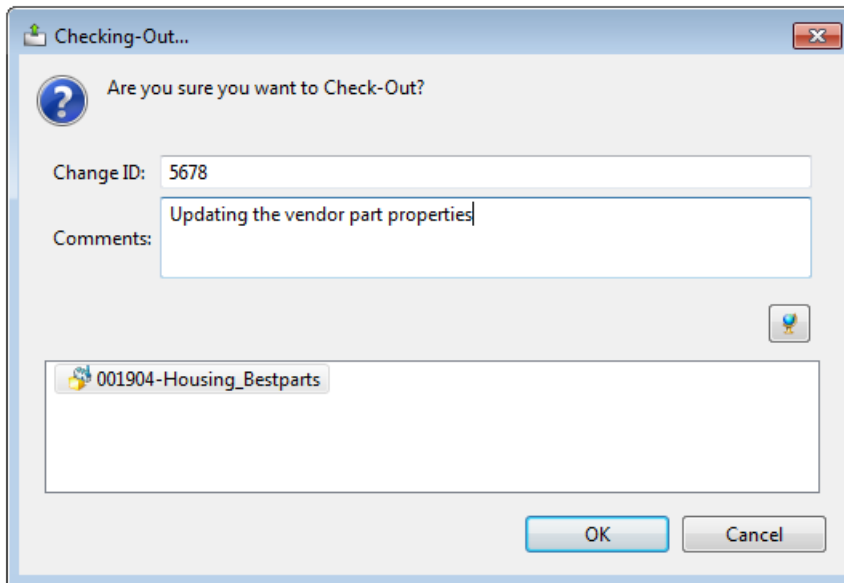
In this case, you can copy the vendor part data to Parts and More as the specifications for the part remain the same.

- Bestparts shuts down operations in Denver, CO, USA to move to a new location.

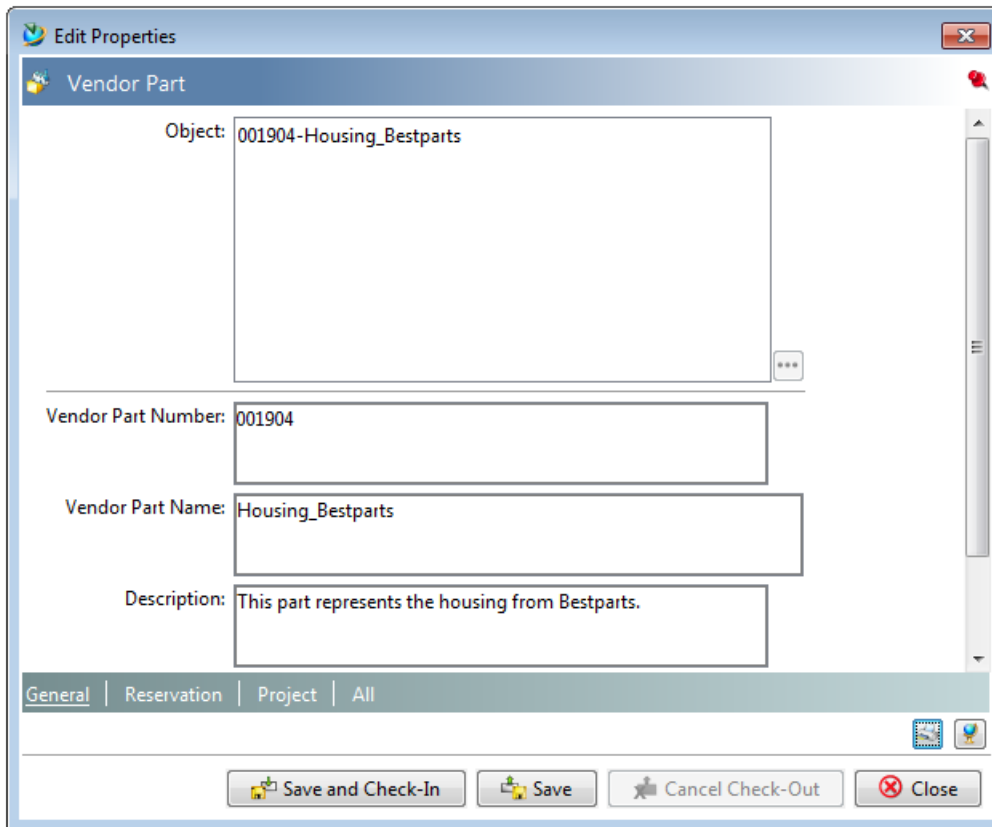
In this scenario, you remove Denver, CO, USA as the vendor part location from the Bestparts housing part and add the new location to it.

Edit vendor part properties

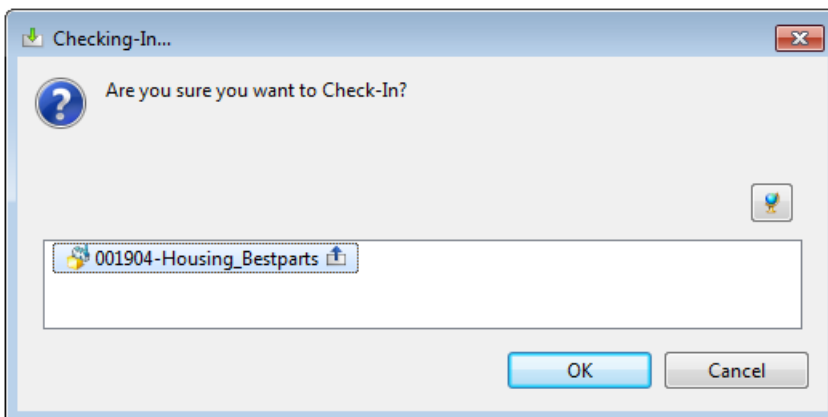
1. Right-click the required vendor part and select **Edit Properties**.
2. In the **Checking-Out...** dialog box, specify a **Change ID** and **Comments** and select the vendor part. Click **OK**.



3. In the **Edit Properties** dialog box, edit the properties and click **Save and Check-In**.



4. In the **Checking-In...** dialog box, select the vendor part and click **OK**.



Relate a vendor part to a commercial part

Associate a **Vendor Part** object  to a **Commercial Part** revision object  as follows:

1. In My Teamcenter, select a **Commercial Part** revision.
2. Drag a vendor part to the **Vendor Parts** folder of the **Commercial Part** revision.

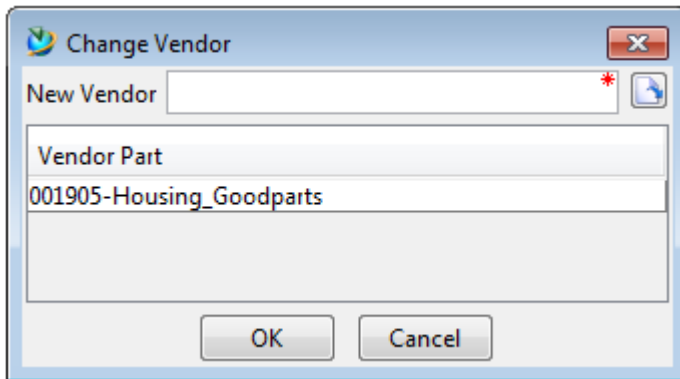
Obsolete vendor parts no longer in use

1. In My Teamcenter, select the commercial part revision.
2. Choose **Tools**→**Vendor Management**→**Update Preferred Status**.
3. Set the preferred status of each vendor part associated with the selected commercial part revision to **Obsolete**.

Copy vendor part data to a new vendor

The **VMS_Maintain_Vendor_History** site preference controls whether the system moves or copies the vendor parts. If the **VMS_Maintain_Vendor_History** site preference is set to **TRUE**, vendor parts are moved to the new vendor but are not disassociated from the previous vendor. You can change the vendor of a vendor part to copy the vendor part data to a new vendor if the **VMS_Maintain_Vendor_History** site preference is set to **TRUE**.

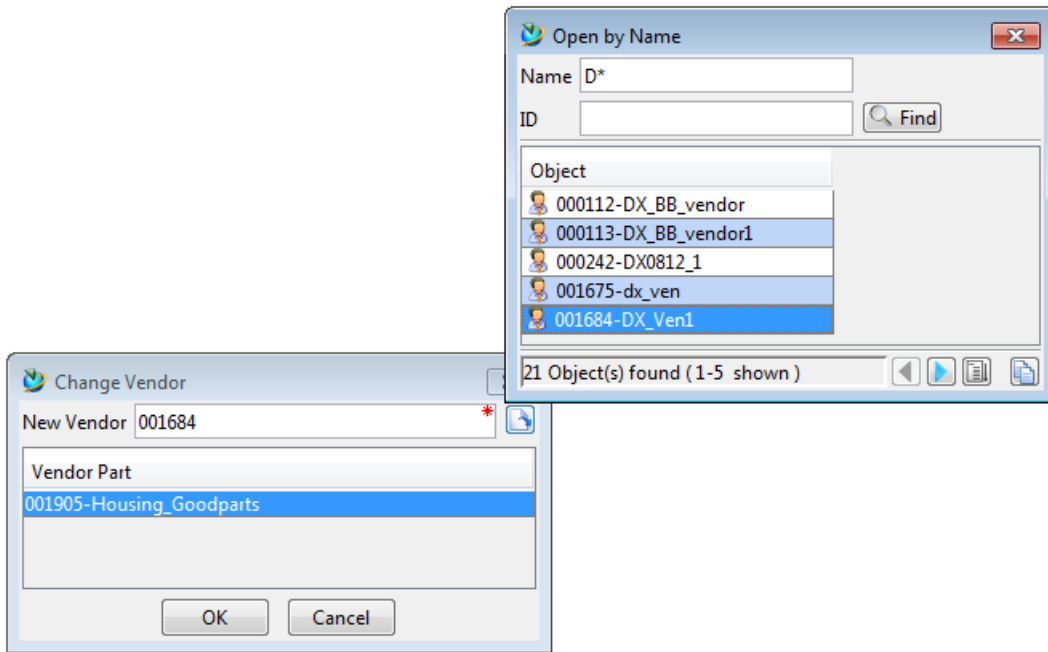
1. Select a vendor part.
2. Choose **Tools**→**Vendor Management**→**Change Vendor**.



3. In the **Change Vendor** dialog box, type the **New Vendor** name.

To search for a vendor, click the  button next to the **New Vendor** box.

In the **Open by Name** dialog box, type either the **Name** or the **ID** of the vendor you are searching for, and click **Find**. Double-click the required vendor from the displayed search results.



The selected vendor is displayed in the **Change Vendor** dialog box.

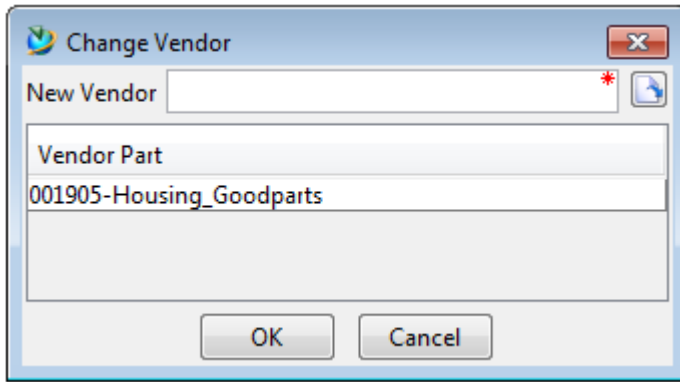
4. Click **OK**.

Change the vendor of a vendor part

The **VMS_Maintain_Vendor_History** site preference controls whether the system moves or copies the vendor parts. If the **VMS_Maintain_Vendor_History** site preference is set to the default value of **TRUE**, vendor parts are copied to the new vendor but are not disassociated from the previous vendor. You can change the vendor of a vendor part by copying the vendor part data to a new vendor.

If this preference is set to **FALSE**, vendor parts are moved to the new vendor and disassociated from the previous vendor. You can change the vendor of a vendor part to another vendor when this preference is set to **FALSE**.

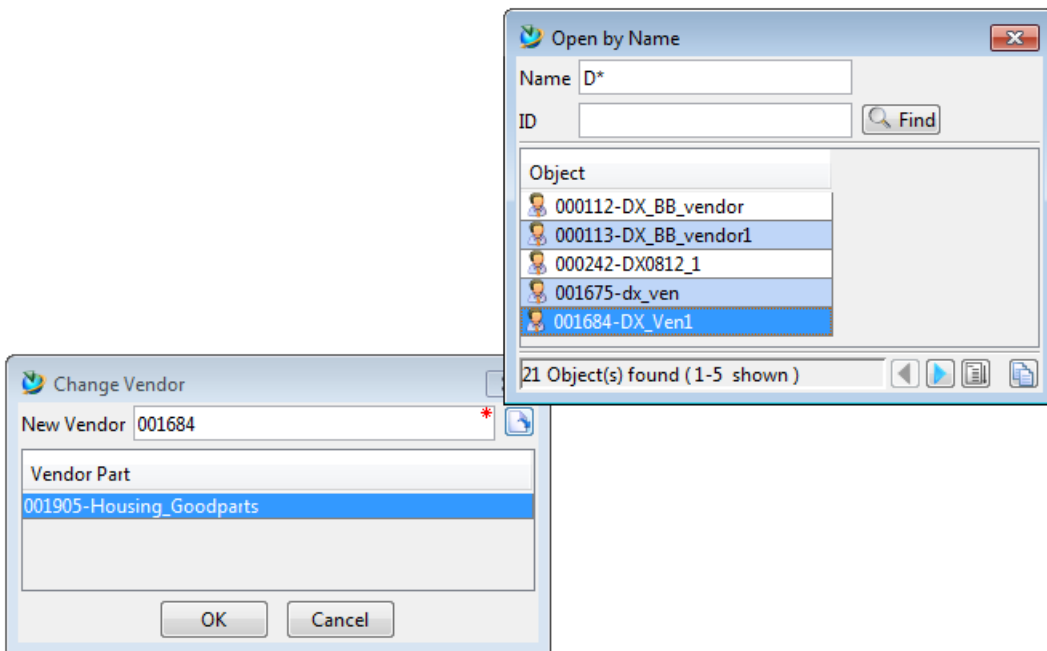
1. Select one or more vendor parts.
2. Choose **Tools**→**Vendor Management**→**Change Vendor**.



- In the **Change Vendor** dialog box, type the **New Vendor** name.

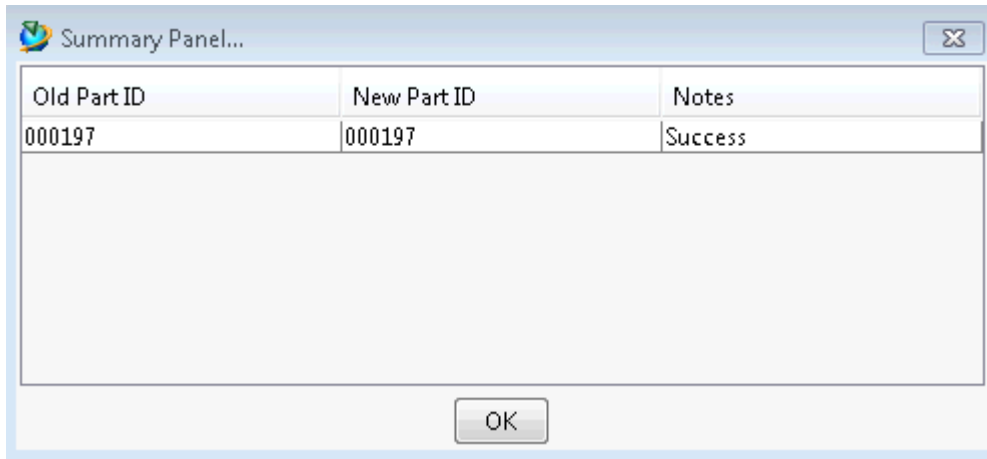
To search for a vendor, click the  button next to the **New Vendor** box.

In the **Open by Name** dialog box, type either the **Name** or **ID** of the vendor you are searching for and click **Find**. Double-click the required vendor from the displayed search results.



The selected vendor is displayed in the **Change Vendor** dialog box.

- Click **OK**.



Relate a location to an existing vendor part

1. In My Teamcenter, select the **Locations** folder in the **Vendors** folder under a vendor part.
2. Drag a location from the vendor to the **Provide From Locations** folder 📁 of the vendor part.

Remove a location from a vendor part

To remove locations from the list of associated locations for the vendor part:

1. In My Teamcenter, expand the **Vendor Location** folder under a vendor part.
2. Select the location you want to remove.
3. Choose **Edit→Cut**.

This only removes the association between the location and the vendor part. It does not delete the location.