Directworks User Guide

Supplier Users

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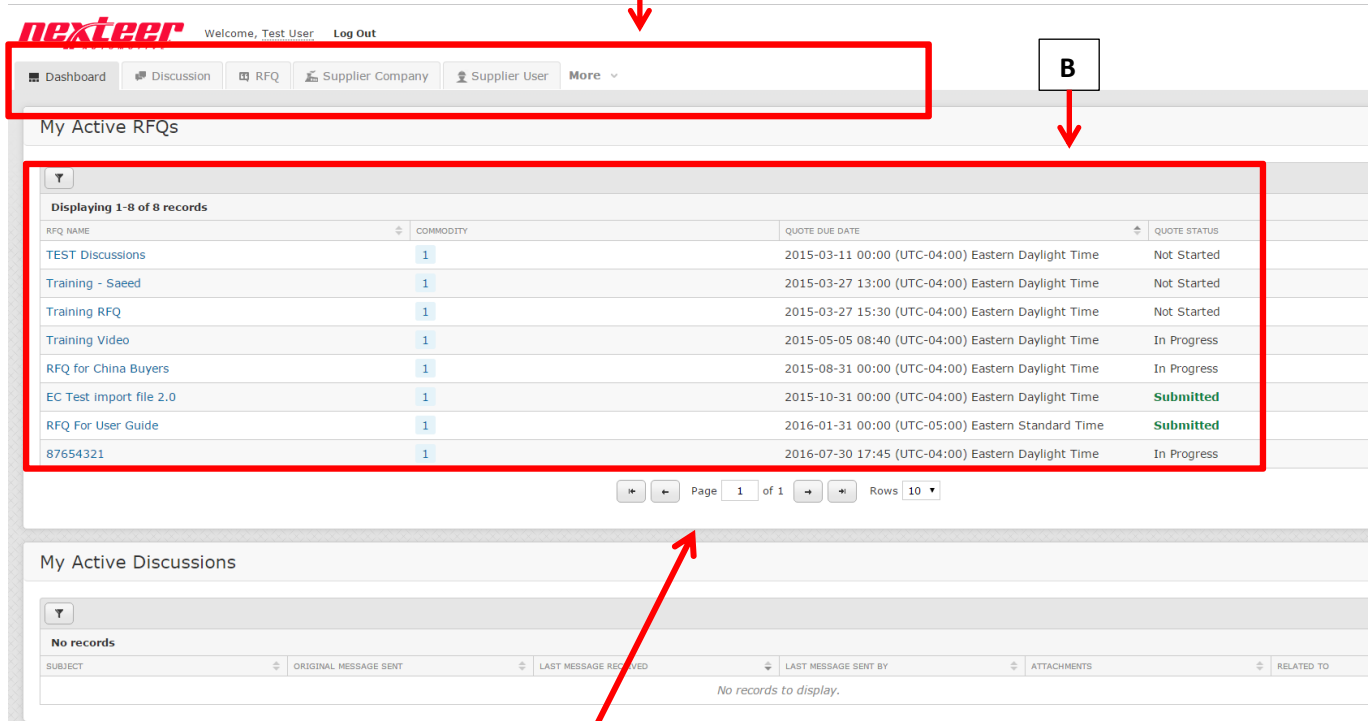
General Navigation

Dashboard

When a user first logs into Directworks, they log onto the dashboard. The dashboard will show the active RFQs and Discussions (if any). Every page will have the following format:

- A. Tabs at the top for quick navigation
- B. Record list and information

If you want to see more records in the record list, you can change the number of rows that are shown by selecting a value from the dropdown.
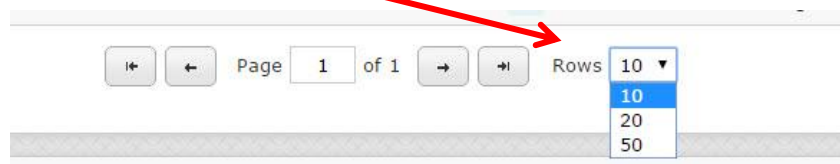
If you are in the quote screen, you will see the below icons. Next to the Icon is what the icon means.

- Show / Expand Section : Click on this icon to show hidden/collapsed the section.

- Hide / Collapse Section : Click on this icon to collapse the section.

- Calculated field : This is just an indicator that the field is not editable and is calculated.

Quote Details

When you go into a quote, you are taken to the quote details section. This is in the following format

A. Overview: This gives some general information, steps that are to be performed, and what the status is.
B. Steps to Complete Section: This is where you will go to review and submit your RFQ response.
C. Content Details: This has the details of the quote, any discussions, and any documents attached.

Reviewing Quotes

When you are first invited to a quote you will receive an email notification from notification@messages.directworks.com. If you are not receiving any emails please see the Frequently Asked Questions section for suggestions.
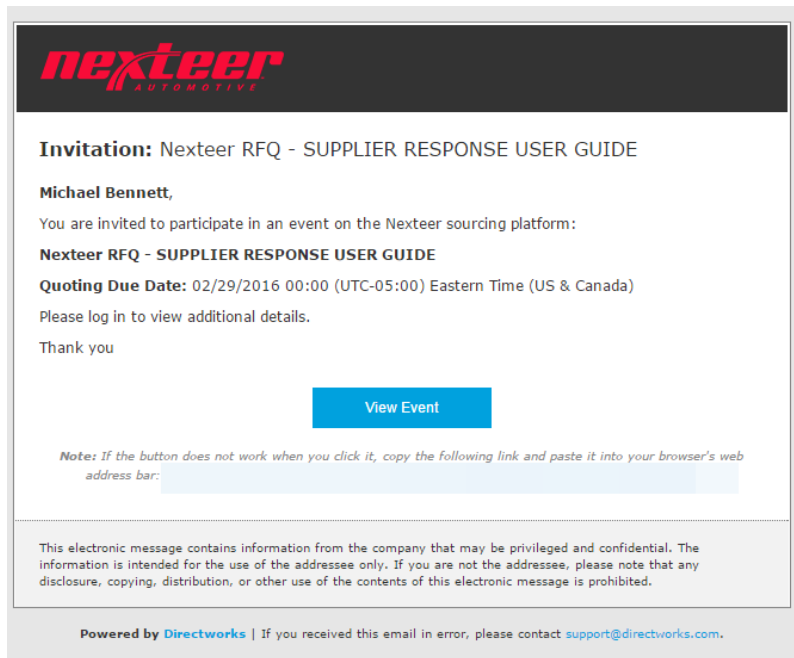
Click on the "View Event" button to go into Directworks. This will take you directly into the specific RFQ.

If you log into Directworks without going through an event/discussion email you will be taken to the Dashboard tab. From there you can access any RFQs that are open to your login. To go into the RFQ, click on the RFQ name.
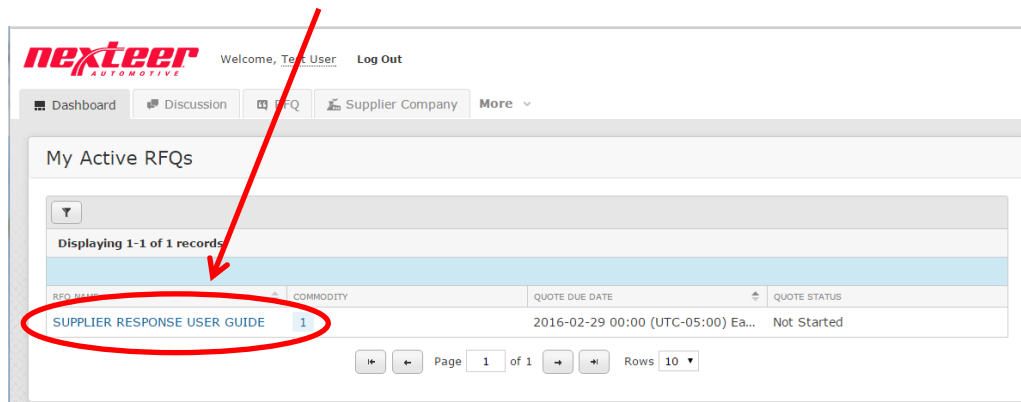
If the buyer indicated that multiple currencies can be quoted, you will be asked to choose your quoting currency. Pick the currency and click the Save & Close button.
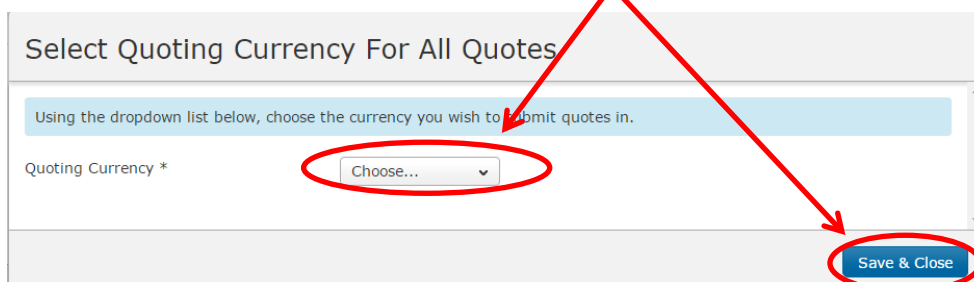
Once you are in the Quote, to see the details, click on the "Quoting" text under the STEPS TO COMPLETE Section on the left side of the RFQ screen.

When you click on that, the overview section will change to show the quoting section. This contains all the part & Nexteer Manufacturing Plant location combinations for the RFQ.

Welcome, Test User   Log Out

Dashboard   Discussion   RFQ   Supplier Company   More

RFQ ›
SUPPLIER RESPONSE USER GUIDE   USD ▾

Overview

STEPS TO COMPLETE

Quoting
Not Started
Due: 2016-02-29 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

Team Users   1
Supplier Users   1
Items   1
Discussions   0
Documents   1

Overview

Please review the required actions below.

∨ Quoting
• 1 Item has a status of 'Not Started'

To see the details, click on the "**Quote Item"** Button for the part that you want to see.

Quoting   Decline Invitation   Submit Quotes

Not Quoting   Import   Export

Displaying 1-1 of 1 records

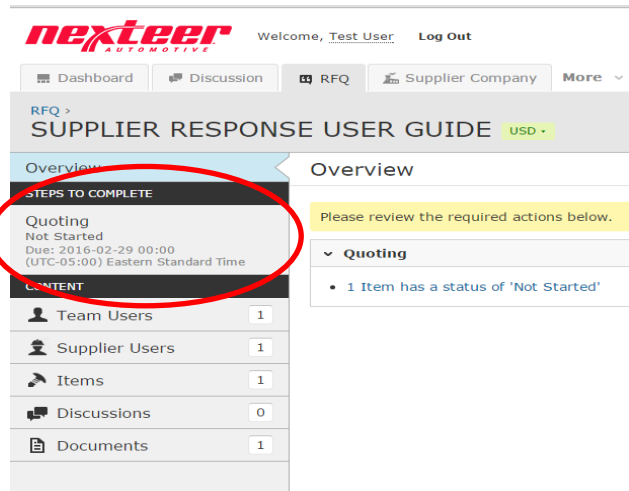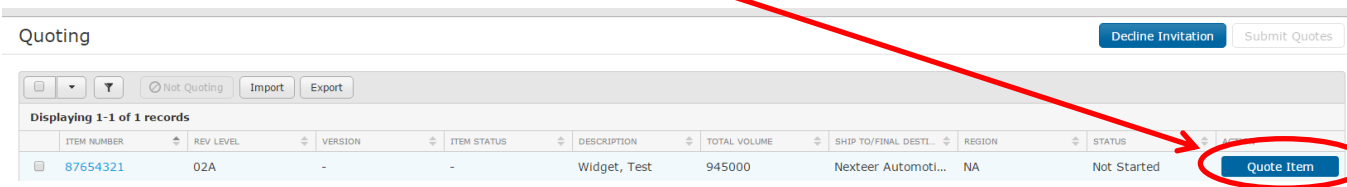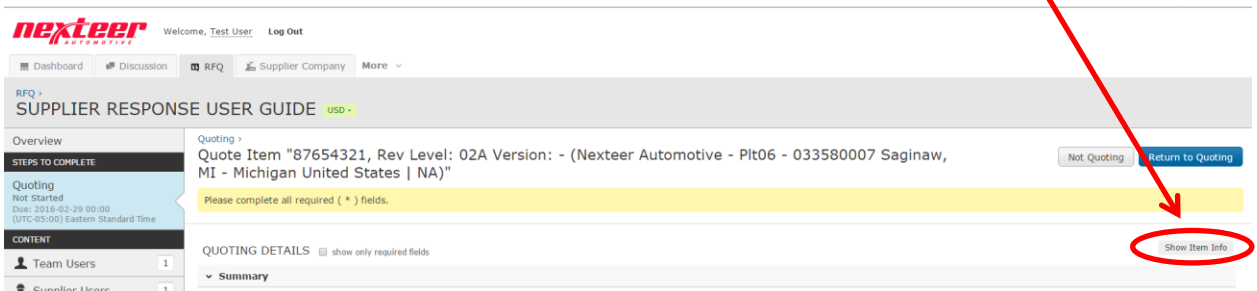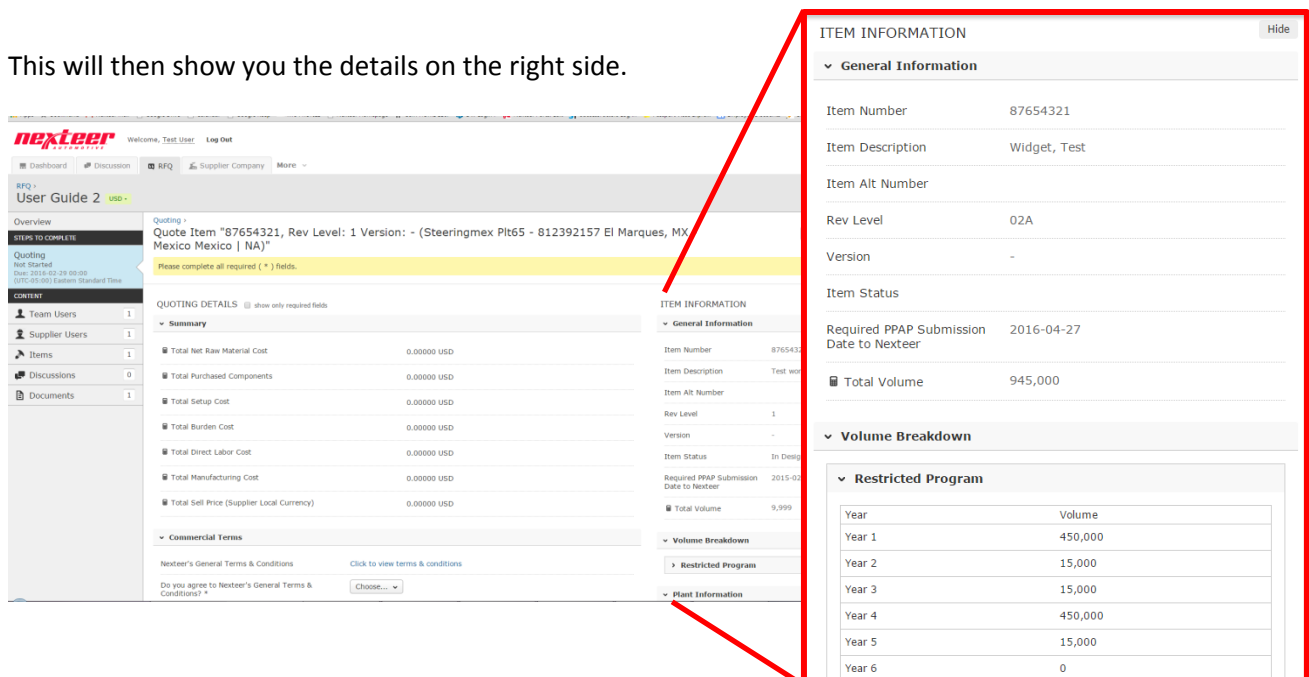|	ITEM NUMBER	REV LEVEL	VERSION	ITEM STATUS	DESCRIPTION	TOTAL VOLUME	SHIP TO/FINAL DESTI...	REGION	STATUS	
	87654321	02A	-	-	Widget, Test	945000	Nexteer Automoti...	NA	Not Started	Quote Item

This will show you the quote screen. To view the details (volume, etc.), click on the "**Show Item Info"** button

Welcome, Test User   Log Out

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RFQ ›
SUPPLIER RESPONSE USER GUIDE   USD ▾

Overview

STEPS TO COMPLETE

Quoting
Not Started
Due: 2016-02-29 00:00
(UTC-05:00) Eastern Standard Time

CONTENT

Team Users   1
Supplier Users   1

Quoting ›
Quote Item "87654321, Rev Level: 02A Version: - (Nexteer Automotive - Plt06 - 033580007 Saginaw, MI - Michigan United States | NA)"

Not Quoting   Return to Quoting

Please complete all required (*) fields.

QUOTING DETAILS ☐ show only required fields   Show Item Info

∨ Summary

This will then show you the details on the right side.

ITEM INFORMATION   Hide

∨ General Information

Item Number	87654321
Item Description	Widget, Test
Item Alt Number	
Rev Level	02A
Version	-
Item Status	
Required PPAP Submission Date to Nexteer	2016-04-27
Total Volume	945,000

∨ Volume Breakdown

∨ Restricted Program

Year	Volume
Year 1	450,000
Year 2	15,000
Year 3	15,000
Year 4	450,000
Year 5	15,000
Year 6	0

Nexteer
Welcome, Test User   Log Out

Dashboard   Discussion   RFQ   Supplier Company   More

RFQ ›
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Overview
STEPS TO COMPLETE
Quoting
Not Started
Due: 2016-02-29 00:00
(UTC-05:00) Eastern Standard Time
CONTENT
Team Users   1
Supplier Users   1
Items   1
Discussions   0
Documents   1

Quoting ›
Quote Item "87654321, Rev Level: 1 Version: - (Steeringmex Plt65 - 812392157 El Marques, MX Mexico Mexico | NA)"

Please complete all required (*) fields.

QUOTING DETAILS ☐ show only required fields

∨ Summary

⊟ Total Net Raw Material Cost	0.00000 USD
⊟ Total Purchased Components	0.00000 USD
⊟ Total Setup Cost	0.00000 USD
⊟ Total Burden Cost	0.00000 USD
⊟ Total Direct Labor Cost	0.00000 USD
⊟ Total Manufacturing Cost	0.00000 USD
⊟ Total Sell Price (Supplier Local Currency)	0.00000 USD

∨ Commercial Terms

Nexteer's General Terms & Conditions   Click to view terms & conditions

Do you agree to Nexteer's General Terms & Conditions? *   Choose... ▾

ITEM INFORMATION

∨ General Information

Item Number   876543
Item Description   Test wo
Item Alt Number
Rev Level   1
Version   -
Item Status   In Desi
Required PPAP Submission Date to Nexteer   2015-0
⊟ Total Volume   9,999

∨ Volume Breakdown

› Restricted Program

∨ Plant Information

No-Quoting

If you do not want to quote, you can no-quote several ways.

No-Quoting full Quote

The first way is to go to the quoting section and click on the "Quoting" text in the Steps to Complete section, on the left side of the quote.

This will show you the details of the quote.

If you do not want to participate in the Full RFQ event, you can click on the "**Decline Invitation**" button at the top of the quoting section.

When you click on the "**Decline Invitation**" button, this will no quote all items.
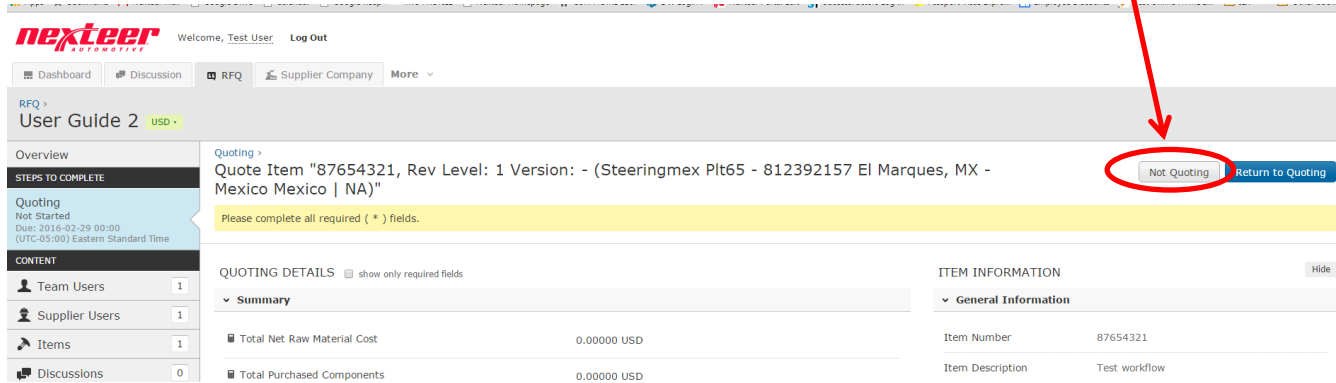
Once you click on the "**Decline Invitation**" button, you will be prompted to put in your reason for declining the invitation, when done click the "**Yes, Decline Invitation**" Button.

No-Quoting – Individual Parts
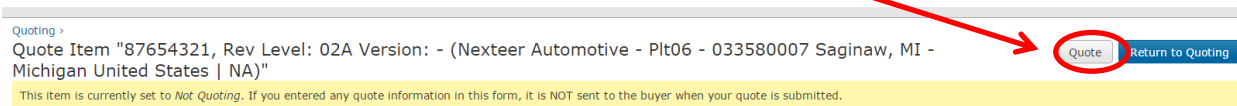
If you want to no-quote a SINGLE item, you must first go into the item details (see "Reviewing Quotes" for how to access this screen).

On the item quoting screen, you will see a button on the top right that says Not Quoting, click that button. This will then set this item to a Not Quote to Nexteer.


If you No Quote and decide you want to quote the part again go to this same screen as you do for Not Quoting. Here you will see that the button will have changed to Quote. Click on that button and this will allow you to enter in your quote information again.

Entering Your Quote

Once you have reviewed the RFQ and you are ready to quote, you need to go to the Quoting Details and click on "**Quote Item**" button for each of the items that you want to quote.
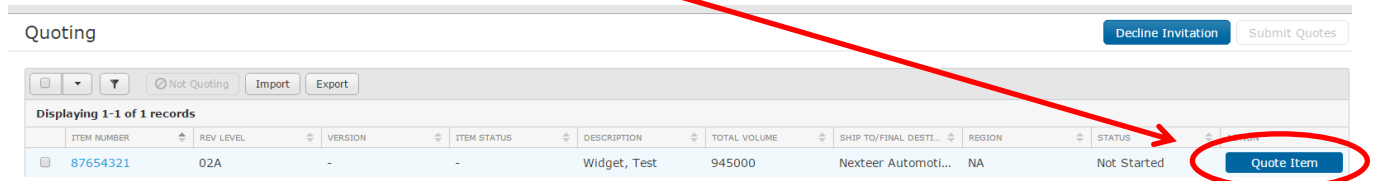
The quote entry is broken down into sections. The top section is the summary of your quote details. These are all calculated fields based on the breakdown information provided further on in the quote. If you are missing some calculations this may be an indicator you didn't fill out the form.

Commercial Terms

In this section you will need to answer questions as to:

- If you agree with Nexteer General Terms & Conditions, and Nexteer's Supplier Requirements

- The manufacturing Duns number for the location you plan to manufacture the part at.

- The Inco Terms, Inco Term Named Place, and if you accept our Title Transfer at Our Plant.

- The payment terms for this part.

- The country of origin or where you are manufacturing.

- The Lead time in weeks for PPAP.

Dross Loss

If you smelt metal for this part you will enter in the Dross Loss %, if you do not smelt metal for this Nexteer Part, enter 0. Dross Loss is the amount of material that is lost during the smelting of the metals due to a mass of solid impurities floating on a molten metal or dispersed in the metal, such as in wrought iron. It forms on the surface of low-melting-point metals such as tin, lead, zinc or aluminum or alloys by oxidation of the metal(s).

⌄ Dross Loss	
Dross Loss % *	

Cost Breakdown

The next step is to fill in the breakdown sections. Note: Any field that has a star is required. Also once you have all valid data in a breakdown row it will turn from a yellow exclamation ⚠ to a green checkbox ✅ .

If you need to add a row to one of the breakdown sections for additional items, click the "Add New Row" button below that section. [Add New Row]

Note: some of the calculations used in the breakdowns use the Production Runs Per year. This field is located at the of the RFQ form under the SG&A / Profit section.

Raw Material

⌄ Raw Material

1 row below is incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

		Unit of Measure *	Material Cost / Unit of Measure *	Material Scrap Resale Value / Unit of Measure *	🖬 Material Scrap Credit	Supplier Source *	Country *	State *	City *	🖬 Total Net Material Cost
1	⚠	▼	USD	USD	USD		▼	Choose... ▼		USD
					0.00000 USD					0.00000 USD

[Add New Row]

RAW MATERIAL BREAKDOWN FIELDS

Raw Material Description: Describe the raw material. Include: material type, grade/spec., size (thickness, blank size, diameter), shape, and stock (sheet, coil, bar, drum). Example: 1215 Steel - 0.7969 - Round Bar Stock

Gross Material Weight (Shot Weight) : Identify the quantity of parts with the specified gross material amount required per part.

Blank Size (L, W, H) / (L, Diameter) : Enter the amount of material required for processing. This is generally considered the "BLANK SIZE".

Net Material Weight: Enter the amount of material remaining after processing

Unit of Measure: Identify the unit of measurement for the amount of material (example: lb., kg., ml, etc.)

Material Cost / Unit of Measure: Identify in local currency, per unit of measure, the cost assumption for the base portion of the raw material cost

Material Scrap Resale Value / Unit of Measure: Identify value of recycle material per unit of measure.

Material Scrap Credit (Calculated) : Calculation = Gross Material weight * (Cost/UoM *((Gross Material weight - Net Material weight)*Resale Value)*Quantity Per part

Supplier Source: Name of the source of Raw Material

Country: Country where raw material is coming from/manufactured

State: State where raw material is coming from/manufactured

City: City where raw material is coming from/manufactured

Total Net Material Cost: Calculation= Sum of Material cost of Rows (e.g. Material 1, Material 2, Material 3, Material 4, Material 5)

Purchase Components and Outside Processing

1 row below is incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

		Purchased Components and Outside Processing								
	Item, Material or Process Description *	Quantity Per Assembly *	Unit of Measure *	Cost / UoM *	Supplier Source *	Country *	State *	City *	🔖 Sub-Total Cost	
1 ⚠			▼	USD		▼	Choose... ▼			USD
									0.00000	USD

Add New Row

PURCHASE COMPONENTS ANS OUTSIDE PROCESSING BREAKDOWN FIELDS
Item, Material or Process Description: Describe the purchased component or outside processing.
Quantity Per Assembly: Identify the quantity of purchased components or outside processing required per part.
Unit of Measure: Identify the unit of measurement for the quantity per part (example: each, lb., kg., ml, etc.)
Cost / UoM: Identify in local currency per unit of measure the cost of the purchased component or outside processing.
Supplier Source: Name of the source of Raw Material
Country: Country where raw material is coming from/manufactured
State: State where raw material is coming from/manufactured
City: City where raw material is coming from/manufactured
Sub-Total Cost: Calculation = Quantity Per part * (Cost/UoM)

Processing

1 row below is incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

		Set Up Costs				Operation					Proc
	Set Up Time (Minutes)	# of Set Up Persons	🔖 Pieces per Lot	🔖 Set Up Costs per Piece	Operation Description	Equipment Description & Size	Quantity per Assembly *	Pieces/Hour *	Pieces per Cycle *		
1 ⚠				USD							
				0.00000	USD						

Add New Row

1 row below is incomplete. Please complete all required fields (yellow) and correct invalid fields (red).

		Processing Time			Direct Labor Costs			Burden Cost				
	Pieces per Cycle *	Manufacturing Efficiency % *	🔖 Standard Hour (with Mfg Efficiency)	Labor Wage Rate (cost/hr) *	# of Direct Operators *	🔖 Labor Cost/ Assembly	Variable Rate (cost/hr) *	Fixed Rate (cost/hr) *	Depreciation Rate (cost/hr) *	🔖 Burden Cost per Assembly	🔖 Processing Cost	
1 ⚠				USD		USD	USD	USD	USD	USD	USD	
				0.00000	USD					0.00000	USD	0.00000 USD

Add New Row

PROCESSING BREAKDOWN FIELDS
Set Up Time (Minutes) : Enter the set up time in minutes required for a production run
# of Set Up Persons: Enter number of persons required for a setup
Pieces per lot (calculated) : Calculation = Volume / "No of production runs per year"
Set Up costs per Piece (calculated) : Calculation: ((SetUpTime/60)/LotRunSize)/ QuantityPerAssembly * ((LaborWage *SetUpPersons) +VariableRate
Operation Description: Describe the operation performed and the component processed.
Equipment Description & Size: Describe the type of equipment used in this operation. Include information such as: number of spindles, max bar stock diameter, hand tools, part fixtures, etc.
Quantity per Assembly: Identify number of times this component is required for the final part. Example: 2 required per part.
Pieces / Hour: Enter in the number of pieces that will be produced in an hour.
Pieces per Cycle: Enter number of pieces produced during the machine or assembly cycle time.
Manufacturing Efficiency %: Identify the % of efficiency during Production - Uptime. Inefficiencies are due issues such as breaks, machine adjustments, material restocking, direct labor. DO NOT INCLUDE SET UP TIME.

Standard Hour (with Mfg Efficiency) (calculated) :
Calculation=((1/PiecesPerHour)/(MfgEfficiency/100)*QuantityPerAssembly
Labor Wage Rate (cost / hr) : Identify in local currency per hour the wages paid to (1) operator performing this type of work. This does not include employment taxes or fringe benefit costs.
# of Direct Operators: Identify the number of direct labor employees required for each operation.
Example: 0.5 = 1 operator per 2 machines, 1 = 1 operator per 1 machine, 2 = 2 operators per 1 machine
Labor Cost / Assembly (calculated) : Calculation=StandardHour*LaborWage*DirectOperators
Variable Rate (cost / hr) : Identify in local currency per hour the portion of the burden that varies with the level of activity. This can include such things as indirect labor, indirect materials (such as manufacturing supplies), utilities, quality control, material handling
Fixed Rate (cost / hr) : Identify in local currency per hour the portion of the burden that remains constant regardless of the level of activity. This can include supervisor salaries, rent/building depreciation, equipment lease, etc.
Depreciation Rate (cost / hr) : Enter in the amount of depreciation in local currency that is depreciated in one hour.
Burden Cost per Assembly (calculated) : Calculation=(VariableRate+FixedRate +DepreciationRate)*StandardHour
Processing Cost (calculated) : Calculation=LaborCost+BurdenCost

Packaging, Logistics, Amortizations, Duties & Customs

In this section you will fill in details around packaging, shipping, and amortization.

SGA & Profit

Enter in the information regarding your SG&A and Profit as well as Process Scrap %.

SG&A & Profit	
# of Production Runs Per Year *	
Lot Run Size	0
SG&A % *	
SG&A Cost	0.00000 USD
Profit on Material % *	
Profit Cost on Material	0.00000 USD
Profit on Purchased Components % *	
Profit on Purchased Components	0.00000 USD
Profit on Value Add % *	
Profit on Value Add	0.00000 USD
Total Profit Cost	0.00000 USD
Process Scrap % *	
Process Scrap Credit	0.00000 USD
Process Scrap Cost	0.00000 USD

# of Production Runs Per Year: The number of production runs per year is the number of times you will run the tool. This can be separated by volume demands, or maintenance requirements. Some processes must be stopped every 10,000 pieces for maintenance, thus the number of runs would be Volume/10,000 = number of production runs. This may also be governed by requirements per month which would be reflected by Monthly Volume/annual volume = number of production runs. This number is also used to calculate setup cost.

Tooling Details & Pre-Production Samples

Fill in the details for your tooling and pre-production sample information. You will also need to specify if you agree to our Nexteer Tooling Commercial Conditions.

Tooling	
Will the part require a new or upgraded tool? *	Choose... ⌄
Nexteer's Tooling Commercial Conditions	Click to view tooling commercial conditions
Do you agree to Nexteer's Tooling Commercial Conditions? *	Choose... ⌄
If you answered No to the question above, please provide details as to what is not agreed to. Responses must be provided in English. Please note: Answering No to this question may remove your organization from final Supplier selection for this Event.	

Pre-Production Samples	
Do you charge for pre-production samples? *	Choose... ⌄

Tooling Detail Breakdown

Enter in the Breakdown information for the Tool you will be using on this Quote.

Tooling Cost Details Breakdown

Enter in the Cost Details for the Tools that are specified in the Tooling Detail breakdown section above that correlates with each line.

Pre-Production Piece Costs

If you require costs for pre-production parts, complete this section.

Exporting / Importing your quote.

If you want to export the quote information, either for your records or to fill out the quote in Excel for importing, go into the Quote Details section.

1. Check the parts that you want to export. 2. Click the Export button. This will download the details into Excel on your computer. Fill in the information in Excel on the different tabs. Each breakdown section has its own tab. Instructions are provided on the instructions tab. Once you fill out the excel file and save it to your computer.

3. Click on the Import button.

This will bring up a screen asking for confirmation.
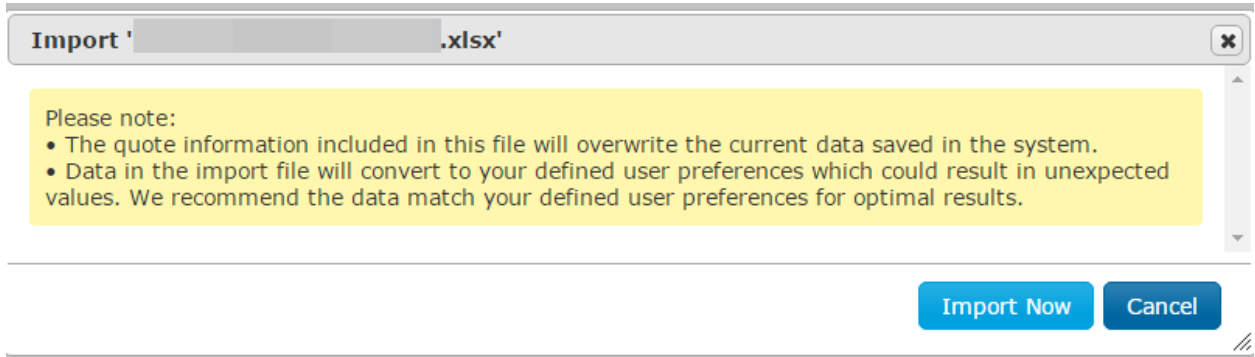
Note: This will replace/overwrite any quote information for the parts that you have enter/imported before.

If there are any issues with the data, you will see a failure message on the screen. This will also give the reason for the failure.
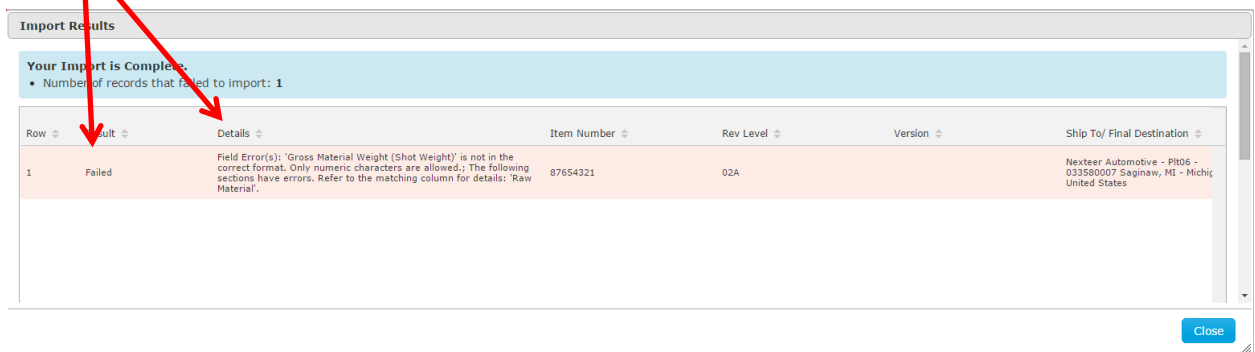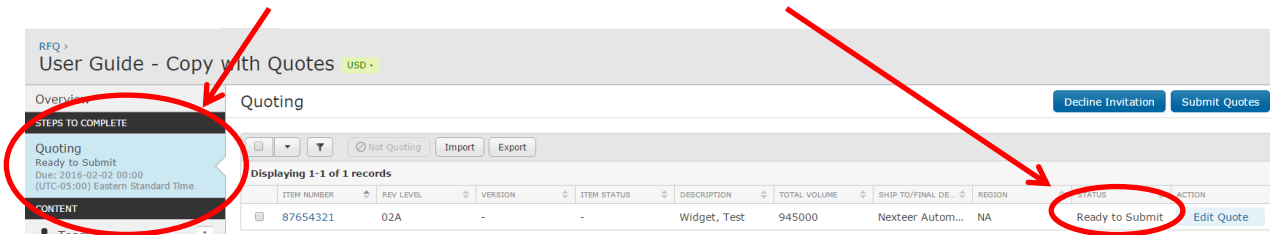

If the data imports successfully, you will see on the screen that it was successful.
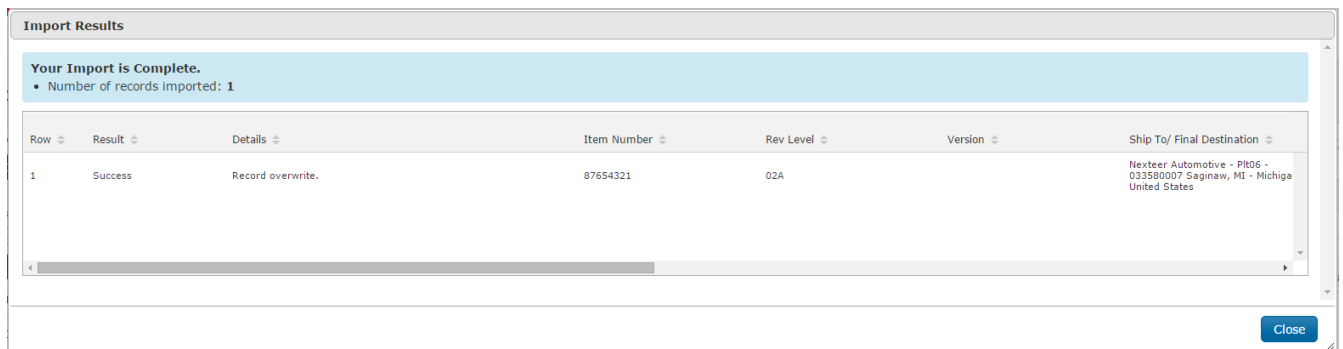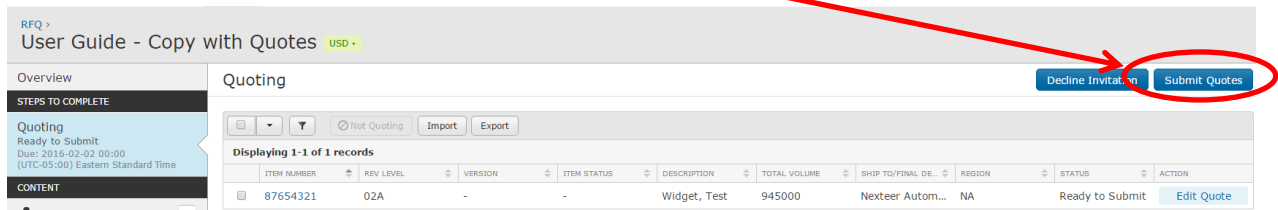
Submitting Your Quote

Once you have completed the quote, you can check that the quote is ready by looking at the Quoting Details and the status. Each line on the quote details should say "Ready to Submit".

Once all the line items are ready to submit, the "Submit Quotes" button at the top of the Quote Details page will become active (turn blue), and you will be able to submit your quote.

Once you click on the "Submit Quotes" button, you will be prompted to confirm the submission. Click the "**Yes: Submit Quote(s)**" button to confirm you want to submit your quote.

NOTE: **Once you submit your quote, you will not be able to edit/change it**. If you need to make a change to the quote after you submitted it, you will need to contact your Buyer and have them re-issue the quote to you.

Discussions

If you want to ask for additional details or have other questions about an RFQ you can start a discussion.

To start a discussion, go into the RFQ and click on the Discussions Tab.

On the Discussion screen, click on the "+ Create" button.

Once you click the button to start the Discussion, you need to add your recipient(s) (Nexteer Team User or one of your other Supplier Users). Fill in the Subject, Message, and if needed attach any documents. Once you have that filled out, click the Start Discussion button.

This will then show the original discussion and any responses. Note: you will not see any comments made by other suppliers, only you will see your and Nexteer's responses.
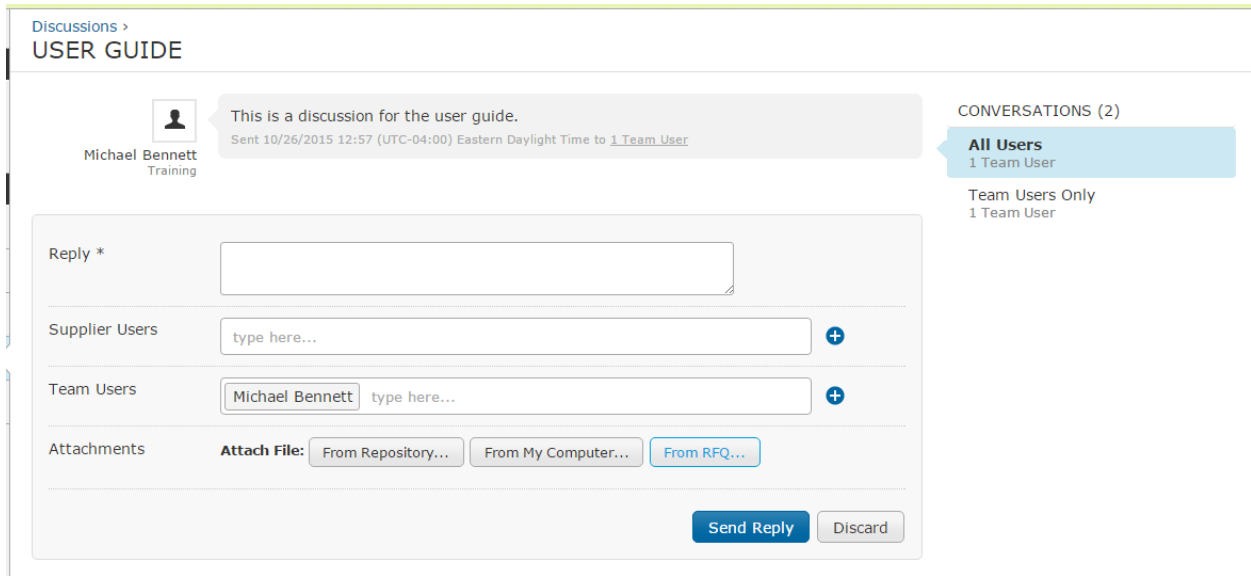
Reviewing / Responding to a Discussion

If Nexteer has started a discussion, you can view it either from the email notification link, Dashboard Discussions List, or if it is part of an RFQ (if the discussion is tied to an RFQ) - through the RFQ Discussions Tab.

If you want to access the discussion from the from the dashboard or RFQ, you can click on the Discussion name and it will take you into that conversation for your to review and respond to. All the submitted responses will show at the top.
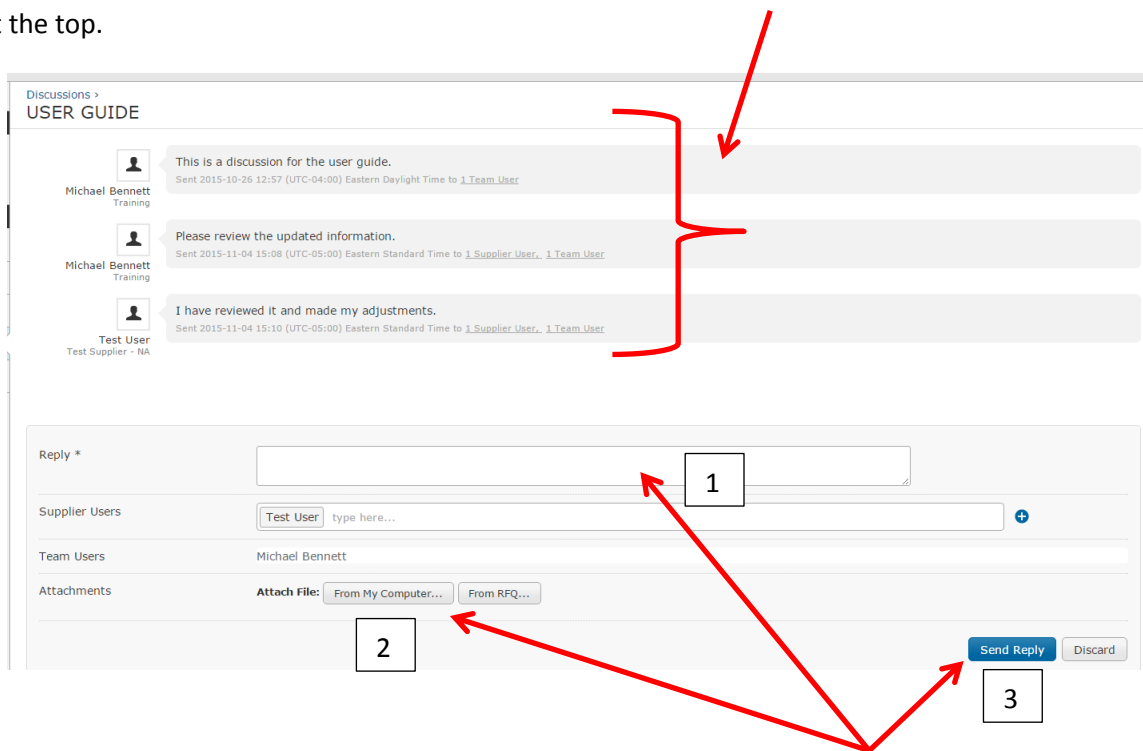

If you need to make a reply, put in your comments into the Reply field, add your attachment(s) (if any), and click the Send Reply button.

Annotate drawings / documents

If you need to annotate a drawing, you will first have to attach it to a discussion. If you don't know how to do the discussion, see the section on Discussions. Add the document for any of the choices (Repository, your computer, or RFQ).
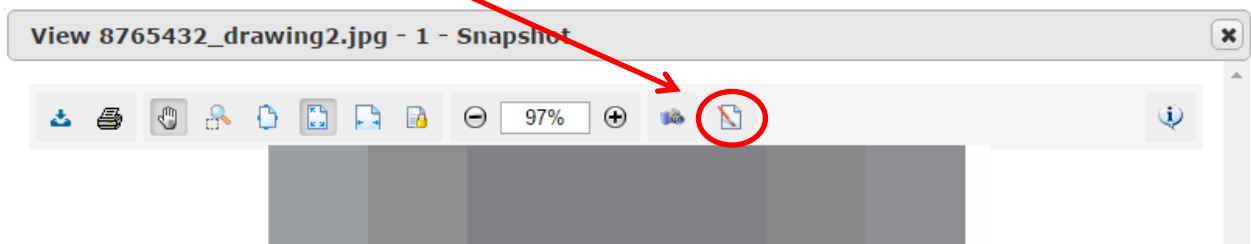
1. Upload/Attach your document(s).
2. When the Image graphic shows (BEFORE YOU START OR SEND REPLY), click on the image box – you may have to wait a short period of time for the image to show.
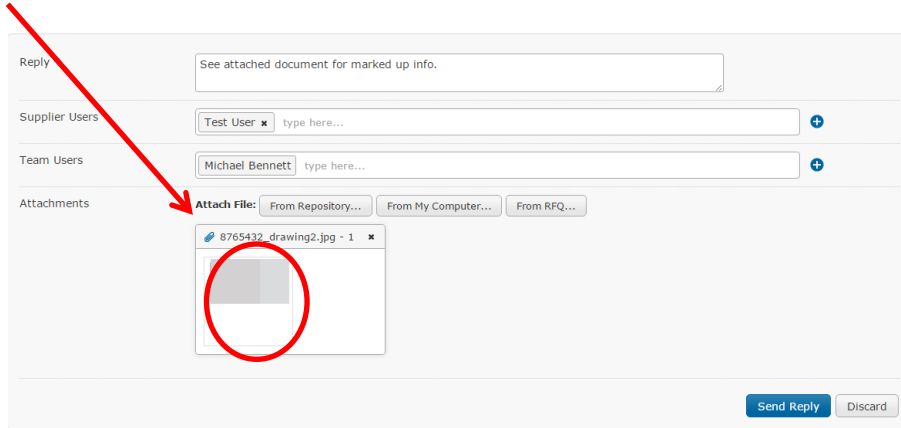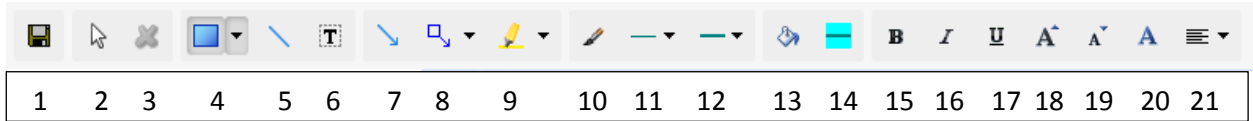

3. This will open up a view window of the image. Click on the snap shot icon .
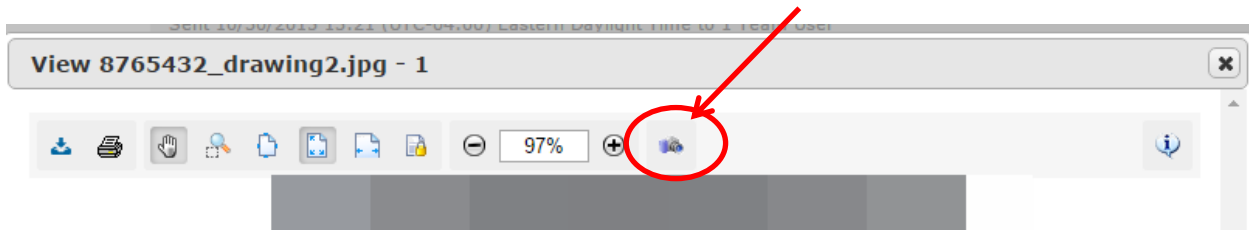
4. This will add a markup icon next to the snap shot icon. Click on the markup icon.

5. This will bring up a toolbar where you can draw on the image.   See below for toolbar description.

1. Save button: Use this to save your annotations.
2. Arrow: This will allow you to move the drawing objects.
3. X: This will allow you to delete the selected element.
4. Shapes: This will allow you to add shapes.
5. Line: This will add a line.
6. Text: This will allow you to add a text box. To edit the text, double click on the box.
7. Pointer: This is a line with an arrow for pointing to something.
8. Text Point: This will allow you to add a call out – text box with a pointer. To edit the text, double click on the box.
9. Highlighter: Allows you to highlight something.
10. Border Color
11. Border Thickness
12. Border Style: Solid, Dashed, Dotted
13. Fill Color
14. Transparency
15. Bold
16. Italics
17. Underline
18. Increase Text Size
19. Decrease Text Size
20. Text Color
21. Text Alignment

When you are done, click the Save button and then click the Done button. This will add a second image to the attachment view.
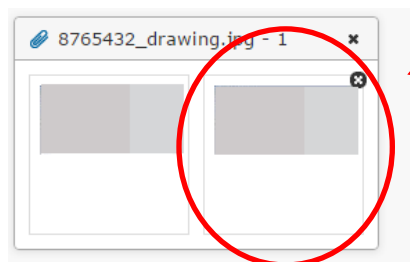
Frequently Asked Questions

- Q: I didn't get an email invite what can I do?
  A: First check that it didn't go into your SPAM/JUNK email folder. If it is not there, talk to your IT department to make sure that notification@messages.directworks.com is a trusted email address. If you have logged into Directworks before, you can log in and see it on your dashboard. If you did not get the initial registration email, contact your buyer to have it resent.