Paradata BOM Advantage
"How-To" Guide
Version 3.2
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About BOM Advantage
As part of the Paradata Advantage Suite, BOM Advantage helps simplify supply chain management. BOM Advantage provides powerful insights to improve the holistic health of your product bill of materials and supply chain. It enriches and harmonizes manufacturer part, cost, and supply data from both private and public sources. Additionally, BOM Advantage provides comprehensive BOM analysis, providing a greater understanding of supply chain risks, as well as the opportunities to decrease costs through price comparisons.

How to Get Started
This section covers the first-time user experience, including how to accept an invitation, create your password, and log in to Paradata Advantage Suite.

Welcome Email
You'll receive a welcome email from donotreply@paradata.io with the subject: Welcome to Paradata Advantage Suite.

Note: Your username is the email address to which the welcome email was sent.

Click the Accept Invite & Setup Password button to create your password.
Create Your Password

Create a password.

Repeat the password to confirm, and click the **Sign Up** button. You will be immediately logged in.
On your initial login, you will see a Tip screen that explains a little about the Paradata Advantage Suite.

After clicking the **Okay** button, this tip will not appear again, unless you reset the Tips & Info. See [How to Reset Tips & Info](#) below.

## Browser Support

For Paradata Advantage Suite, we recommend using the latest version of Chrome (on Windows or OS X).
You can also use IE 11+ on Windows, or the latest version of Safari on OS X.

For Paradata Mobile, use the latest version of Chrome for Android, or latest Safari for iOS.

**How to Log In**

Access the [Paradata Advantage Suite](paradata.io) by visiting the paradata.io website and clicking the **Login** link in the upper right corner of the page.

Enter your username and password, then click the **Login** button. **Note:** Your username is the email address to which the welcome email was sent.

See the [How to Get Started](#) section for more details.

---

![Login Screen](image)

**Resetting Your Password**

To reset your password, click the **Forgot your Password?** link on the login screen. Then, enter your email address and click **Submit**. This will send you an email that includes a link to reset your password.
How to Navigate Paradata Advantage Suite

On your initial login, the system defaults to Projects.

Use the left-side navigation to:
- Access Profile Settings
- Catalog - Parts Advantage provides manufacturer part search and deep manufacturer part data. Refer to the “Parts Advantage How-to Guide” for details.
- Projects – BOM Advantage provides a BOM analysis to help identify sourcing risks and data integrity issues
- Company Settings
- Feedback – Contact Paradata with issues, questions, or enhancement requests
- Help – Access documentation, videos, and release updates
- Collapse or Expand the left navigation

How to View Your Projects in BOM Advantage

From the left-side navigation bar, select Projects.

Projects List

The Projects page lists the projects in your account.

You can search and sort the projects list. Search by project name, version, or description. Sort by:

- Created date
- Items where all approved mfr parts are at risk
- Items where all approved mfr parts have lifecycle risks
- Items with non-RoHS compliant mfr part on AML
- Project name
- Updated date
- Updates count
Each project slat displays the project name, version name, description, a summary of critical sourcing risks, and the created or updated date, as well as the count of recent updates. The 3 risks summarized are:

- Count of items where all approved manufacturer parts have lifecycle and/or RoHS risks
- Count of items where all approved manufacturer parts have lifecycle risks
- Count of items with non-RoHS compliant manufacturer part on AML

Click a slat to view the project details.

From the actions menu, you can Upload New Company Prices, View Company Price Files, or View Archive.

See [Upload Company Prices](#) for details about uploading contract prices, standard costs, and partner quotes that can be applied across projects.

From the company price files, you can upload prices, download price files, or delete price sets.

**Note:** You must have the Account Owner or Editor role to upload or delete prices.

From the project archive, you can view the list of archived projects and restore an archived project.

**Manage Company Price Files**

From the Projects list’s action menu, select View Company Price Files to manage price files.

The Company Price Files page lists all the company-wide price set files uploaded. From this page, you can upload prices, download price files, or delete price sets.
Note: You must have the Account Owner or Editor role to upload or delete prices.

Upload Company Prices

Note: You must have the Account Owner or Editor role to upload prices.

Click the Upload New Prices button to upload company-wide Contract prices, Standard Costs, or Partner Quotes. Price sets uploaded to the company can be applied to all your company’s projects.

Select the type of prices to upload. Contract prices are for manufacturer parts, standard costs are for items, and partner quote prices can be for items or manufacturer parts.

Click Next to specify price set information.
For partner quotes, when you type in the partner name. As you type a name, the auto-suggest feature shows the relevant partner names already used for other price sets.

**Tip:** Select from the existing list of partner names over adding another, so you don’t end up with multiple variations of the same name.

**Note:** It is important to use consistent naming when uploading prices to see all relevant prices for a partner in a comparison column. For example, avoid using “Partner 1” and “Ptnr1” for the same partner.

Browse for the comma-separated-values (CSV) formatted price file. When standard costs are uploaded, the CSV file must include Item Number and Cost fields. However, the fields vary depending on what you are uploading. See the table below for additional information.

**Notes:**

- The column headings must be in the first row with no blank rows above.
- Additional columns are ignored. However, duplicate column headings will cause upload failures.

Add a unique name for the price set that you are uploading, and modify the date if needed.

Click **Next**.

Map the fields from the file to the Paradata price fields, and click **Upload**.

The following describes the fields included in a CSV formatted price file for each price type.
<table>
<thead>
<tr>
<th>Price Type</th>
<th>“Prices For” Selection</th>
<th>Fields in CSV Price File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Manufacturer Parts</td>
<td>Supplier</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manufacturer Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manufacturer Part Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unit Cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Quantity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Contract Number</td>
</tr>
<tr>
<td>Standard Costs</td>
<td>Items</td>
<td>Item Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unit Cost</td>
</tr>
<tr>
<td>Partner Quotes</td>
<td>Items</td>
<td>Item Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unit Cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Volume Quantity</td>
</tr>
<tr>
<td>Partner Quotes</td>
<td>Manufacturer Parts</td>
<td>Manufacturer Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Manufacturer Part Number</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unit Cost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Volume Quantity</td>
</tr>
</tbody>
</table>

You can modify the [Field Mappings in Company Settings](#) to add or remove values.

Click the file name link to download the file, or [Delete](#) to delete the file.

Use caution when deleting price sets: this action will affect all projects with related items and can affect filler prices.

**Restore an Archived Project**

From the Projects list’s action menu, select [View Archive](#) to see a list of archived projects.

Archived projects are inactive and must be restored to view the project details.

Click the [Restore Project](#) button to re-activate the project and move it to the active Projects list.

**Note**: You must have the Account Owner or Editor role to restore an archived project.

**How to Create a New Project**

Here is an overview of how to create a new project in BOM Advantage:

1. [Format the BOM file](#)
2. [Upload the BOM](#)
3. [Define the AML Structure](#)
4. [Map the column headers](#)

**Note**: You must have the Account Owner or Editor role to create a new project.
What is in the Bill of Materials (BOM)

The Bill of Materials (BOM) is the recipe for building the product.

- A BOM is a hierarchical list of the manufacturer parts or components required to build a product.
- The BOM describes the product to assemble (for example, a laptop).
- Many items can be organized into sub-assemblies (for example, a fan to cool the laptop).
- An item is the definition or requirement for a part (Item, Item Part Number, IPN, Customer Part Number).
- Each item can have multiple manufacturer parts that fulfill the item's requirement. Those parts are the item's Approved Manufacturers List (AML). Each part on AML has:
  - Each manufacturer part is produced by a manufacturer (MFR).
  - Each manufacturer part can be purchased from multiple suppliers (Manufacturer part number, MPN).
  - AML Status differentiates which manufacturer parts on AML are preferred for purchase or alternate if the preferred part is not available.
- Paradata chooses the public price supplier based on the lowest price of the most recent prices. See Public Price Suppliers to see the list of possible suppliers.

Format the BOM File

If you have a PLM system, you can likely export the Bill of Materials in the Product Data eXchange (PDX) format. Note that this is the preferred format. PDX handles AML structure, character encoding, and escaping issues much more robustly than other formats.

If PDX is not available, BOM Advantage supports a Comma Separated Values (CSV) file (RFC 4182).

The BOM file consists of data about the hierarchical structure and item quantities in the BOM (Level, Item Number, Item Description, and Quantity) and the parts on the approved manufacturer's list (AML) (Manufacturer Name, Manufacturer Part Number, and AML Status). The data expected in your BOM are:

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level</td>
<td>This number identifies where the item resides in the hierarchy of the BOM. It starts with 0 for the top-level BOM and the direct child items (or sub-assemblies) are level 1 (parent level + 1), and so forth.</td>
</tr>
<tr>
<td>Note:</td>
<td><em>There must be one and only one level 0 item, which is the top-level assembly.</em></td>
</tr>
<tr>
<td>Item Number</td>
<td>Internal part number (or customer part number) used by your organization to identify an item or the requirements for the item.</td>
</tr>
<tr>
<td>Item Description</td>
<td>The description that summarizes the requirements for the item. For example, the description for a ceramic capacitor with a capacitance of 10uF, dielectric X5R, capacitance tolerance of</td>
</tr>
</tbody>
</table>
±20%, and rated DC voltage of 6.3 volts might be “Cap, 10uF, X5R, 20%, 6.3V, Cer”.

**Note:** If the same item is used multiple times in the BOM, use the same description and the same parts on AML.

| Quantity | The line quantity of this item. |
| Manufacturer Name | The name of the manufacturer that makes the MPN. |
| Manufacturer Part Number | The manufacturer part number given by the manufacturer who makes the part that fulfills the item requirement, commonly referred to as the MPN. |
| **Note:** Do not use distributor part numbers. |
| AML Status | The Approved Manufacturers List status identifies which MPN you tend to buy for this item. The status values we expect in ranked order are: Preferred and Contracted, Preferred, or Alternate. |

**Notes:**
- **The column headings must be in the first row with no blank rows above it.**
- **Additional columns are ignored. However, duplicate column headings will cause upload failures.**

Items without manufacturer parts are typically custom items. Items with only a single manufacturer part on AML are treated as risks to your supply chain.

List the item (Level, Item Number, Item Description, and Quantity) and the first AML (Manufacturer Name, Manufacturer Part Number, and AML Status) on the same row.

If there are no AML, you can list the item without AML. If there are multiple AML, the AML structure can be in rows or columns. Refer to examples A and B below to see how to structure the AML in rows or columns. In each example, the first item has no AML, the second item has one AML, and the third item has three AML.

**Example A: AML Structure in Rows**

AML in rows means that additional parts on AML are listed on the subsequent rows. You can repeat the item information on the subsequent rows, or only list the AML.

<table>
<thead>
<tr>
<th>Level</th>
<th>Item Number</th>
<th>Item Description</th>
<th>Qty</th>
<th>Manufacturer Name</th>
<th>Manufacturer Part Number</th>
<th>AML Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>IPN001</td>
<td>Plastic Cover</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>IPN002</td>
<td>Power Supply</td>
<td>2</td>
<td>Acme, Inc.</td>
<td>ABCDEFG</td>
<td>Preferred &amp; Contracted</td>
</tr>
<tr>
<td>1</td>
<td>IPN003</td>
<td>Capacitor</td>
<td>24</td>
<td>Acme, Inc.</td>
<td>ABC123</td>
<td>Alternate</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PartsRUs</td>
<td>XYZ123</td>
<td>Preferred</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PartsRUs</td>
<td></td>
<td>Preferred</td>
</tr>
</tbody>
</table>
Note: Additional data columns are ignored.

Example B: AML Structure in Columns (without the optional AML Status)

AML in columns means you can list each manufacturer part across multiple columns. Remember that each column header must be unique, so you may have Mfr1, MPN1, AML Status1, Mfr2, MPN2, AML Status2, etc.

If you include the optional AML Status, there would be three additional columns for AML Status 1, AML Status 2, and AML Status 3.

<table>
<thead>
<tr>
<th>Level</th>
<th>Item</th>
<th>Description</th>
<th>Qty</th>
<th>Mfr Name 1</th>
<th>Mfr Part 1</th>
<th>Mfr Name 2</th>
<th>Mfr Part 2</th>
<th>Mfr Name 3</th>
<th>Mfr Part 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>IPN001</td>
<td>Plastic Cover</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>IPN002</td>
<td>Power Supply</td>
<td>2</td>
<td>Acme, Inc.</td>
<td>ABCDEFG</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>IPN003</td>
<td>Capacitor</td>
<td>24</td>
<td>Acme, Inc.</td>
<td>ABC123</td>
<td>PartsRUs</td>
<td>XYZ123</td>
<td>PartsRUs</td>
<td>LMNOP</td>
</tr>
</tbody>
</table>

Note: Columns not used by BOM Advantage are ignored.

Create a New Project
From the Projects list, click the New Project button, in the top right corner.

Note: You must have the Account Owner or Editor role to create a new project.

Upload the BOM File
In the New Project dialog, enter the project name and description, select the BOM file, and enter the version name and assembly quantity, then click the Next button.
The project name can be the name of the product, a code name, or a different product identifier. While project names are not required to be unique, it is recommended to do so.

Select the BOM file by clicking the Choose a BOM file (.pdx or .csv) button to select the PDX or CSV file to upload. If a BOM has not yet been created, you can download a CSV template to help you get started. See the Format the BOM File section above for details about preparing your BOM for upload.

Enter a version number or letter. For example, "1" or "A", or possibly the BOM Internal Part Number (IPN). Enter the assembly quantity intended to be built. This can be a monthly, quarterly, or annual volume. The assembly quantity must be a positive integer less than one billion.

If you are uploading a PDX file, click Upload, otherwise, click the Next button.

Define AML Structure
In this step, you describe the AML structure in your BOM file. Paradata supports manufacturer parts in rows or manufacturer parts in columns. Select which way your BOM file is organized. See Format the BOM File section above for more details.

Specify if your BOM file has AML Status data or not.

Click the Next button.

Map the Column Headers
Using the BOM fields dropdowns, you map the names of your BOM file's columns to the appropriate Paradata fields.
**Tip:** If the field name dropdowns are empty, ensure that the heading information is in the first row of your CSV file, and that the file doesn’t have empty rows at the top. Also, ensure that your BOM does not have any duplicate column headings. See the [Format the BOM File](#) section, above, for details about the information to include in your BOM.

As you map each field, the green checkmark appears. After all the fields are mapped, click the **Upload** button.

### How BOM Advantage Processes the BOM

Paradata BOM Advantage uploads the BOM, and queries the Paradata’s harmonized, golden dataset to see if the manufacturer parts in your BOM are already in our parts catalog.

Based on the manufacturer part number and manufacturer name, the manufacturer part’s data is enriched with part parametrics and price information. Each parametric is provided with an authenticity quotient (AQ), representing our confidence in its accuracy. We also provide a price scaled authenticity quotient (SAQ), which represents how confident we are that the price is actionable based on the reliability of the source, and the recency of the data.

Manufacturer parts for which we have part parametrics and price information, are labeled as Enriched. Manufacturer parts for which we have part parametrics, but lack price information, are labeled as Matched.

When an unknown manufacturer part is encountered, we create high-priority data-gathering request to the Paradata Platform. Such parts are labeled as sourcing. Once the Paradata Platform has gathered parametrics, and/or price information, the part’s status is updated.

Based on the key terms and rules set for your account, some items will be labeled as Custom, meaning they are not sourceable (e.g. custom items, make parts, labels, documentation, schematics).

See [Sourcing Breakdown](#) to learn more about enriched, matched, sourcing, and custom items.
Larger BOMs may take a few minutes to load. Once loading is completed, an email is sent to all subscribed users.

# How to Navigate Your Project

To get a project’s details, click on the project slat on the Projects list page.

Clicking the slat displays the latest version of the project.

The project details consist of two tabs:

- **Overview**
- **Materials**

## Return to Projects List

In the top left, you can see: Projects > <Project Name> <Project Version selector>. Click on the Projects link to return to the Projects list. Alternatively, click on Projects in the left-side navigation bar.

## Switch Between Project Versions

View earlier project versions to gauge how the BOM health is changing over time.

In the top left, is: Projects > <Project Name> <Project Version selector>, displaying the project version being viewed. Use the <Project Version selector> to switch to an earlier version.

## Create a New Version

When a new version of a project is uploaded, risks, issues, and overall health of the BOM are re-analyzed.

Click the **New Version** button to upload new version.

**Note:** You must have the Account Owner or Editor role to create a new version.
Upload a New BOM File

In the Upload New Version wizard, click the Choose a BOM File (.pdx or .csv) button to select a PDX or CSV BOM file.

Enter a version number or letter. For example, “2” or “B”, or possibly the BOM Internal Part Number (IPN) or version. While version identifiers are not required to be unique within a project, it is recommended to do so.

Enter the assembly quantity intended to be built. This can be a monthly, quarterly, or annual volume. The assembly quantity must be a positive integer less than one billion.

If you are uploading a PDX file, click Upload, otherwise, click the Next button.

Define AML Structure

In this step, you describe the AML structure in your BOM file. Paradata supports manufacturer parts in rows or manufacturer parts in columns. Select which way your BOM file is organized. See Format the BOM File section above for more details.

Specify if your BOM file has AML Status data or not.

Click the Next button.

Map the Column Headers

Using the BOM fields dropdowns, you map the names of your BOM file’s columns to the appropriate Paradata fields.
**Tip:** If the field name dropdowns are empty, ensure that the heading information is in the first row of your CSV file, and that the file doesn’t have empty rows at the top. Also, ensure that your BOM does not have any duplicate column headings. See the [Format the BOM File](#) section, above, for details about the information to include in your BOM.

As you map each field, the green checkmark appears. After all the fields are mapped, click the **Upload** button.

**View Project Source Files**
From the Menu button, select **View Project Source Files** to manage the BOM and price files. You can also [Rerun the version](#) or [Archive Project](#).

The Project Source Files page lists the BOM file uploaded for each version as well as any price set files uploaded to the current project. From this page, you can upload prices, download files, or delete price sets.
Click **Upload New Prices** to launch the Upload Prices wizard for uploading Partner Quotes to a project. For more details, see [Format and Upload the Price File](#).

Click the file name link to download the file.

For price set files, you have the option to delete the file. Use caution when deleting price sets: this action will also affect other projects with overlapping items and can affect price fillers.

### Archive a Project

From the Menu button, select the **Archive Project** option to move the project into the Archive (thereby making it inactive). You can also [Rerun the version](#) or [View Project Source Files](#).

**Note:** You must have the Account Owner or Editor role to archive a project.

### How to Use the Project Overview

The Project Overview contains a summary of the project, and a set of analyses. Each analysis helps to pinpoint an area of importance of the BOM.

Analyses:

- **Sourcing Breakdown** - See the data completeness, and identify custom items
- **Sourcing Risks** – See where there are supply-chain risks and opportunities to mitigate those risks with prescribed part equivalents
- **Cost Breakdown** - Focus on the few items that make up the bulk of your product's cost
- **Cost Comparison** - Compare prices from different sources to find opportunities to lower cost.
- **Data Integrity Issues** – See where there are issues with the structure and data in the BOM file
Summary

The project summary shows the name, version, and description of the project you are viewing. By default, when you click the View Project button from the Projects list, the latest version is shown.

The summary information includes:

- **Quantity** - The assembly quantity number entered when creating the project version.
- **Best Unit Price** - A combination of all the lowest public and private prices that are compared in the Cost Comparison analysis for an assembly unit.
- **Lead Time** - The longest factory lead time in the project. Lead times are based on a 5-day business week. For example, 60 means 12 weeks.
- **Created or Last updated date time** - The date and time that the project was created or last updated. After the project is updated, a New Updates button appears which shows the number of recent updates. Clicking this button opens the Materials list filtered by Recent Updates.
- **Rerun version**

Rerun Version

Rerun a version to pull the latest information from Paradata’s harmonized, golden dataset.

Click the Rerun button to rerun the project version.

The Paradata Platform continuously curates the harmonized, golden dataset, finding new information about manufacturer parts and prices. Some interesting data that can affect the health of your BOM are:

- Part lifecycle changes - when a manufacturer part goes from Active to Not Recommended for New Design or Obsolete.
- New prices, RoHS compliance status and lead time information.
- New form, fit, and function part equivalents that mitigate sourcing risks or have lower prices.

**Note:** Paradata automatically reruns the latest version of every project for the first two days after the version is created. After which, the sourcing items are reclassified as not found. This is viewable in the Sourcing Breakdown analysis. Additionally, Paradata automatically reruns all projects, weekly, to obtain new information.

You can view details about a project’s recent updates by clicking the New Updates button. New updates occur when a project is rerun, either manually or automatically, or when you are prompted to refresh the project and you click the Refresh link. The date and time of the update and number of updates are shown on the Project Overview page.
**Sourcing Breakdown**

The Sourcing Breakdown analysis provides a clear picture of the completeness of Paradata's information about your BOM. The more a BOM is well-understood, the higher the BOM Health Grade.

The goal is for 100% of your BOM's manufacturer parts to be enriched or flagged as custom.

When the BOM is uploaded, the system looks for your BOM's manufacturer parts in Paradata's harmonized, golden dataset, and categorizes them as follows:

- **Enriched**: The manufacturer part is in our catalog. The system has enriched the manufacturer part with parametrics and price data. If the prices are more than 3 days old, a high-priority request is made for new prices.
- **Matched**: The manufacturer part is in our catalog, but we don't have prices for it. The system has enriched the manufacturer part with parametrics and has made a high-priority request for prices.
- **Custom**: The item description has either matched a Custom Part key term or a user has manually flagged the item as custom because the item is a custom or non-sourceable item. Flagging an item as custom also applies to any manufacturer parts on the item's AML.
- **Sourcing / Not Found**: Paradata automatically reruns version for two days after the version is uploaded. After the initial three days, any items in the sourcing category are considered not found, meaning there is a low likelihood of finding public information for the item. You can flag items as custom to move them from this category to Custom. You may also want to verify the manufacturer part numbers to make sure they are accurate.

**Tip**: For greater accuracy, we recommend using a manufacturer's part number in place of a distributor's part number.

You can view the Sourcing Breakdown by Items or Manufacturer Parts (Mfr Parts).

- An enriched item has at least one manufacturer part on AML that is enriched, but not necessarily all the item's AML is enriched.
- A matched item means none of the manufacturer parts on AML are enriched, and at least one manufacturer part on AML is matched, but not necessarily all the item's AML is matched.
- When an item is flagged as custom, all the item's AML are also custom
- When an item is categorized as sourcing or not found, all the item's AML are sourcing or not found.

In the Items view, click on any category to drill into the Materials list filtered by that category.
**Identify Custom Items**

Custom items are those that are non-sourceable (e.g. custom items, make parts, labels, documentation, schematics).

From the [Sourcing Breakdown analysis](#), click the **Identify Custom Items** button to see the assemblies and items that are sourcing or not found.

![Identify Custom Items](#)

**Note:** You must have the Account Owner or Editor role to identify custom items.

Based on the item description, you can select the custom items by selecting the checkbox in the item row and clicking the **Set Selected As Custom** button.

![Identify Custom Items](#)

There is a confirmation message to set the selected items as custom.

![Are you sure you want to save these changes?](#)

Click the **Yes** button to save the specific selected item(s) as custom.

The system gives you the option to remember a description prefix as a key term for automatically identifying custom items. The description prefix consists of the words in the description up to the first comma. If there are no commas in the description, it is the first word.

![Automatic Status](#)

Clicking the **Yes** button on the Automatic Status dialog:

- Flags as custom any other items whose description matches the new key term(s) in the remainder of this BOM
- Stores the new key term to apply to all future BOMs uploaded to [Custom Item key terms in Company Settings](#).

**Sourcing Risks**

There are 8 tracked supply-chain risk categories:

- Items where all approved mfr parts have lifecycle and/or RoHS risk – These are the highest risk items that would have no manufacturer parts on AML, if you remove manufacturer parts with lifecycle and/or RoHS risk from the AML.
- Obsolete or near end-of-life mfr parts – The count of manufacturer parts whose lifecycle state is Obsolete, Last Time Buy, Not Recommended for New Designs, Part Number Change, or Transferred.
- Mfr parts not RoHS compliant.
- Mfr parts with poor availability – The count of manufacturer parts whose factory lead time is greater than 60 business days (or 12 weeks).
- Single-sourced items – Items with only one part on AML. This also includes items where zero or one parts on AML without lifecycle risk. For example, if an item has manufacturer parts A and B on AML, but manufacturer part A is Obsolete.
- Mfr parts missing lifecycle data – Of the manufacturer parts that are in the Paradata catalog, these are the manufacturer parts for which the Paradata Platform has not yet discovered the Lifecycle status.
- Mfr parts missing RoHS data – Of the manufacturer parts that are in the Paradata catalog, these are the manufacturer parts for which the Paradata Platform has not yet discovered the RoHS compliance status.
- Unfound mfr parts – The manufacturer parts on your BOM that are not in the Paradata catalog.

To help mitigate risks associated with manufacturer parts in your BOM, we identify and display information about any available part equivalents. If a manufacturer part is not RoHS compliant, for instance, we indicate high quality equivalents that are compliant. However, these parts may incur a higher cost.

Click the **View Items** button to view the items with sourcing risks in the Materials list view. Click an item for an expanded view of the AML and a list of any prescribed part equivalents.

![Sourcing Risks Table](#)
Click a risk tile to see the Materials list view filtered by that risk category.

**Download Sourcing Risk Information**

You can export the details of the sourcing risk categories by clicking the Download icon. An individual CSV file is created for each category, and the files are bundled in a ZIP folder.

![Download icon]

**Note:** Depending on the web browser used, the ZIP folder may be available for download within the browser or it will be sent to you via email.

**Cost Breakdown**

The Cost Breakdown analysis is designed to provide opportunities to focus price negotiation efforts. Generally, 80% of the cost of a BOM comes from only a small fraction of the items in the BOM.

Class A covers the number of items that make up approximately 80% of the BOM.

Class B covers the number of items that make up approximately 15% of the BOM.

Class C covers the number of items that make up approximately 5% of the BOM.

Click through from Class A or Class B (in the chart or table) to see the Material list ordered by descending Best Price. Click through from Class C (in the chart or table) to see the Material list ordered by ascending Best Price.

**Cost Comparison**

The Cost Comparison analysis enables you to compare prices from multiple sources side-by-side and determine what the potential best cost could be by taking the best prices from each comparison source.

You can upload your private price data to a project. We refer to these as Partner Quotes, which are prices quoted from your Electronic Manufacturing Services partners or Original Design Manufacturers. When you configure the Cost Comparison, the system can compare your prices to the publicly available list prices that Paradata has, standard costs, contract prices, and other partner quotes uploaded to similar projects. The Cost Comparison shows you savings opportunities.

The graph in the Cost Comparison analysis provides a side-by-side comparison of the prices uploaded from public prices, standard costs, contract prices, and partner quotes. Partner quotes uploaded to this project or other projects with overlapping items and similar volume quantities can be configured for comparison.
When first uploading a project into BOM Advantage, the Cost Comparison analysis compares public against standard costs, and indicates the best prices. Until standard costs are uploaded for an item, a filler price will be displayed. Additional partner quotes uploaded into this project are automatically included in this analysis.

Price fillers are used when a comparison source is missing prices, so that all the totals are based on prices for the same number of items. Price fillers are chosen based on the lowest price in the past 4 months (120 days) for the item or parts on AML that meet the volume quantity for the project. If there are no prices within the past 4 months, the system selects the lowest price from the most recent day.

The comparison base is the baseline for comparison. The price bars are ordered from highest total price to lowest total price, followed by best price. Those with the highest delta amounts reflect the top savings opportunities.

On the left side, the Potential Savings on AML reflects the total extended savings if you use the best prices, compared to the selected comparison base. You can open a more detailed view of the potential savings breakdown by clicking on the Potential Savings on AML amount.

The Top Opportunities are the items with the highest potential savings. You can click on the item link to see its details in the Materials list or click the View Items button to view the Materials list sorted by Best Price in descending order.

The Potential Savings from Off-AML Equivalents reflects the total extended savings if you use lower-priced part equivalents from the best price. Click on the Items link to view the Materials list with the Has Part Equivalents filter selected. Items with lower-priced part equivalents are listed at the top, and are indicated by a green Has Lower-Priced Part Equivalents icon in the row. Other items with part equivalents whose prices are the same as the original item, or higher, have a black Has Part Equivalents icon.

The gray area of a bar represents where the source’s prices are not optimal. You can click in the gray (or orange) area to view the Materials list sorted by the selected bar’s data, grouped by non-optimal price, and ordered by descending price. Click in a blue or purple area of a bar to view the Materials list sorted by the selected bar’s data, grouped by best, and ordered by descending price. The price fillers and missing prices are always grouped at the end. See the View Detailed Cost Comparison section for more information.
**Configure Cost Comparison Analysis**

To configure the Cost Comparison analysis, click on the gear button. The Cost Comparison dialog allows you to select which price sources to compare. By default, the public and standard sources are selected for comparison, and standard is set as the comparison base. Where Standard Costs are missing for an item or have not been uploaded at the company level, there will be price fillers.

![Configure Cost Comparison](image)

As prices are uploaded to this project, the partner is listed under Partners In This Project and are automatically selected for comparison. If partner prices have already been uploaded to other projects and there are prices applicable to this project, the Cost Comparison configuration dialog will list those partners under Partners Outside of this Project. You can select or deselect these partners as needed, choose whether to include public, standard, or contract sources, and select the comparison base.

It is also possible to compare the prices from a partner uploaded in this project to the prices from the same partner uploaded to other projects.

In the Price Sets field, you can pick multiple price sets to compare side-by-side. For example, you may get quotes from the same partner every quarter. You can compare those quotes side-by-side by selecting the specific price sets with each quarter’s quote. Similarly, as your standard costs change, you can compare those.

In general, when selecting sources, the most recent applicable prices are used for comparison. When selecting price sets, the applicable values from that set is used.

Click **Save** to see the selections reflected in the Cost Comparison analysis.

**Format and Upload Price Files**

By default, the Cost Comparison analysis compares the public prices to the standard costs. In addition, it allows you to upload your own private prices.

**Note:** You must have the Account Owner or Editor role to upload prices.

Click the **Upload New Prices** button.
Partner Quote prices can be for items or manufacturer parts.
Click **Next** to specify price set information.

Type in the partner name. As you type a name, the auto-suggest feature shows the relevant partner names already used in other projects.

**Note:** *It is important to use consistent naming when uploading prices across projects to see all relevant prices for a partner in a comparison column. For example, avoid using “Partner 1” and “Ptnr1” for the same partner.*

Browse for the Comma-Separated-Values (CSV) formatted price file. When partner quotes are uploaded at the item level, the CSV file must include Item Number and Cost fields. However, the fields vary if you are uploading prices at the manufacturer part level. See the table below for additional information.

**Notes:**
- *The column headings must be in the first row with no blank rows above.*
- *Additional columns are ignored.*

Add a unique name for the partner price set that you are uploading, and modify the date if needed.
Click **Next**.
Map the fields from the file to the Paradata price fields, and click **Upload**.

Note the volume quantity when configuring the comparison of partner prices that you are uploading. You can compare partners that have an equal or lower volume quantity to minimize the number of filler prices.

The following describes the fields included in a CSV formatted price file, depending on if you are uploading prices for items or manufacturer parts selected in the first step.

<table>
<thead>
<tr>
<th>“Prices For” Selection</th>
<th>Fields in CSV Price File</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items</td>
<td>Item Number</td>
</tr>
<tr>
<td></td>
<td>Unit Cost [To Build X]</td>
</tr>
<tr>
<td>Manufacturer Parts</td>
<td>Manufacturer Name</td>
</tr>
<tr>
<td></td>
<td>Manufacturer Part Number</td>
</tr>
<tr>
<td></td>
<td>Unit Cost [To Build X]</td>
</tr>
</tbody>
</table>

You can modify the [Field Mappings in Company Settings](#) to add or remove values.

**Data Integrity Issues**

There are 6 tracked data-integrity issue categories:

- Items without manufacturer parts - These items are commonly custom or non-sourceable items (e.g. custom items, make parts, labels, documentation, schematics). From this list, you can [flag those items as custom](#).
- Duplicate items - The same manufacturer’s part is listed in the AML of multiple items. This is typically indicative of having duplicate item numbers.
- Items with inconsistent descriptions - The same item is used multiple times in the BOM, but with different descriptions.
- Mfr parts missing manufacturer part numbers - These items may be custom, or erroneous data was uploaded without the manufacturer part number.
- Mfr parts missing manufacturers - These items may be custom, or erroneous data was uploaded without the manufacturer name.
- Items missing description - These items were uploaded without any descriptions.
Click the tile to drill-down to the specific issues.

**Download Data Integrity Issue Information**
You can export the details of the data integrity categories by clicking the Download icon. An individual CSV file is created for each category, and the files are bundled in a ZIP folder.

![Download icon]

**Note:** Depending on the web browser used, the ZIP folder may be available for download within the browser or it will be sent to you via email.

**Manage the Project Materials**
The Materials view displays a consolidated BOM flat view of leaf items with the total quantity for the BOM.

**Filter**
Filter items by Sourcing Breakdown results, whether part equivalents are available, timeframe and category of updates and sourcing risk categories.

For example, to show all the items whose results status is Enriched, select Enriched and click the **Apply** button.
**Note:** An item is considered enriched when at least one of its AML is enriched. Only items without any enriched, matched, or custom parts on AML appear when filtering on Sourcing.

**Availability of Part Equivalents**
In the Materials view, items can be filtered based on whether part equivalents are available, by selecting the Has Part Equivalents filter option.

The Has Part Equivalents column indicates whether equivalent parts are available for a listed item. A green icon in the row indicates that there is a lower priced equivalent than the best price, while a black icon indicates that there are part equivalents although they are priced the same or higher than the original.

**Updates**
The Paradata platform continuously updates data related to your project, retrieving the most current lifecycle information, lead time changes, compliance details, new part equivalents, sourcing status, and new prices. Paradata automatically reruns the latest version of each project for the first two days after creation, and then reruns them on a weekly basis to obtain new information related to the manufacturer parts in your projects.

When new prices are uploaded to the company or other projects that affect the current project, you may be prompted to refresh the data and that will affect the updates.

Updates occur when a project version is rerun or refreshed.

In the Materials view, updates can be filtered based on:

- **Everything** - Displays an unfiltered list (removes the updates filter)
- **Most Recent** - Changes that have occurred between the last version rerun or refresh and the rerun or refresh prior to that. If this is the first version rerun or refresh, the Most Recent filter will display all the updates since the current project version was first uploaded. Selecting Most Recent, allows you to further filter by the price, availability, lifecycle, compliance, and status update types that are noted below.
- **All Updates** – Updates that have occurred from the initial upload of the project version until now. You can further filter by the below update types.
  - **Price** - Updates to public price information
  - **Availability** - Updates to lead time of a manufacturer part
  - **Lifecycle** - Updates to the lifecycle state
  - **Compliance** - Updates to compliance data
  - **Status** - Updates to sourcing status, such as whether an item was recently enriched

You can select an item row in the table to view an item's AML and the updates that occurred. Notifications summarizing the updates during a version rerun are also emailed to you. See the View Update History section about where you can view a log of all the updates for the manufacturer part.
**Sourcing Risks**
You can filter by any of the eight sourcing risk categories to see the items with that category of risk.
To see the items associated with a risk category, click the sourcing risk category and click the **Apply** button.

**Search**
Type in the search field and press the Enter key to filter the table based on your search criteria. Search works across Item and Item Description.

Click the **Clear Search** link to remove the filter.

**Configure Cost Comparison**
To configure the Cost Comparison analysis, click on the gear button. The Cost Comparison dialog allows you to select which price sources to compare and set the comparison base.
Click **Save** to see the selections reflected in the Materials table.

See the [Configure Cost Comparison analysis](#) section above for more details.

**Hide or Show Columns**
Click the column chooser icon to select which columns to display in the table. Hiding a comparison column does not remove it from the comparison. You need to configure cost comparison to add or remove a source from comparison. See [Configure Cost Comparison](#) above.

The options are:
- Lifecycle – The best case of the manufacturer parts on AML. For example, if an item has two parts on AML, one that is Active and another that is Obsolete, the Materials table will display Active.
- RoHS – The worst case of the manufacturer parts on AML. For example, if an item has two parts on AML, one is Not Compliant and the other is Compliant, the Materials table will display Not Compliant.
- Avg Lead Time – The average of the known factory lead time values for the parts on AML.
- Quantity
- Price sources – There is one column for each price source configured for comparison in the Cost Comparison analysis. By default, public and standard source columns are shown, and additional columns will display as you upload additional prices and configure more sources. Prices are shown at the unit, line, or extended price.
- Best price
- Delta
- Variance
- Results – See Sourcing Breakdown analysis for details on the results
- Has Part Equivalents – An icon in the column means that Paradata has identified one or more part equivalents. If the icon is green, that means there is a part equivalent with a lower price than the best price.

Selecting the Prices to Display
All prices can be shown as unit prices, line prices, or extended prices by selecting the Unit, Line, or Extended option in the column chooser.

Download Materials List
Click the Download icon to download the Materials list as a Microsoft Excel file. The XLSX file contains three worksheets.

1- Totals: Shows the totals row for each of the comparison columns
2- Materials_Items: Includes all the items in the list, and reflects the columns, filters, and sorting that were visible, plus all prices (unit, line, and extended).
3- Materials_Items_AML_Equivalents: Includes all the items (ordered by item number ascending) along with the on AML parts and off-AML part equivalents.

Sort
You can see the sort icon.

The table is sorted by this column in ascending order.

The table is sorted by this column in descending order.

Click on the column header to sort the column. For columns configured in the Cost Comparison analysis, items are grouped by best price at the top in descending order. Select the column header again to see items grouped by not best prices in descending order. For contract prices, items are grouped by contracts that are the best price, contracts that are not the best price, price fillers, and missing prices. Select the column header again to see items grouped by contracts that are not the best price first.

View Detailed Cost Comparison
The Project Materials tab provides price information from different sources. These details can help you identify the optimal price for items in your project. The columns that can be displayed are based on how the Cost Comparison analysis is configured. Listed prices can include those that are publicly available, standard costs, contract prices, partner quotes, including prices for an item that may have been included in a different project or version and prices uploaded at the company level.
• Price fillers are used when the source is missing price information for an item. Filler prices are indicated with orange cells.
• The lowest, or best, price for an item is indicated by a blue cell.
• Contract prices are indicated by a purple cell, and when the contract price is best, the best price column displays the purple cell.

The Best Price column displays the lowest price from the comparison columns, among all the suppliers that are being compared. The Delta column shows the difference between the base and best prices, while the Variance column shows this difference as a percentage.

Above the price comparison columns, you can see the total cost per column.

**Item Details**

On the Project Materials tab, you can click on an item row to view the Item Details contextual side pane. When the side pane is open, you can click another item row (or use the up and down arrow keys) to display the information for that row. The contextual side pane contains several tabs of information: Best Price, Lifecycle, RoHS, and Avg Lead Time.

If there are any sourcing risks related to this item, there will be one of 3 icons next to the item number.

- 😊 - This is an item where all approved manufacturer parts are at risk for lifecycle or RoHS.
- 🌟 - This item is single-sourced with no other risks associated.
- 🚨 - This item has one or many risks, but does not fall into either of the above categories. For example, it may be single-sourced with long lead time and missing RoHS.
The contextual side pane lists the item number, item description from the uploaded BOM, line quantity, and the Where Used details for this project.

In the example above, the item is used in only one sub-assembly in this BOM and its parent item is listed inline. For items that are used in multiple sub-assemblies, the number of sub-assemblies appears beside Where Used. Click the View link next to Where Used to see the parent items.

The item shown above has one manufacturer part on the AML, listed under Approved Mfr Parts.

From the contextual side pane, click on the MFR Part number link to drill into the Manufacturer Part information and view the manufacturer part details, public prices, where used information, or history depending on the context from where you drill-in.

There are several ways to close the contextual side pane and return to the Materials view. You can click the X button in the top right corner of the pane, click the same selected item row, or press the Esc key on your keyboard.

**Best Price**
The Best Price tab displays the price information from all the cost comparison columns and highlights the best prices. The same pricing legend applies to the Best Price tab as on the Materials table.
You can view details on:

- AML parts with prices
  - The lower price of private or public price for the manufacturer part is displayed
- Prescribed part equivalents with the green "Is lower-price part equivalent" icon offers a better price than the best price.

Recent updates

The Price SAQ represents Paradata's confidence level in executing on that public price. This is based on the reliability of the source as well as the recency of the data. Price SAQ ranges are:

- ♦ indicates high price confidence: 85-100
- ■ indicates medium price confidence: 70-84
- □ indicates low price confidence: < 70

For each price, you can click on the Price SAQ shield, the private price icon 🔄, or the private contract price icon 🔄 to see the price provenance, which is all the details about the origins of the price.

If contract prices are configured for comparison and the contract price is best, the contract price icon displays in the Best Price tab. If the best price is not that contract price, a flagged contract price icon will display to alert you that the contract price is not the best 🔄. Click the icon to see the provenance details.
Click the MFR PART link from the Approved Manufacturer Parts or the Prescribed Part Equivalents to go to the manufacturer part’s Prices tab.

**Lifecycle**

The **Lifecycle** tab displays information on the manufacturer part’s lifecycle state.

The tab itself provides an indication of the state, as noted below. This is the value that displays for the item’s lifecycle in the Materials table.

- **Dash (-) or Unknown** – The lifecycle state for all AML parts is unknown
- **Active or Preliminary** – One or more manufacturer parts on AML is active or preliminary, other manufacturer parts may be unknown or any other state, including Obsolete. If there is a mixture of Active and Obsolete parts on AML, a warning icon will also display on the tab.
- **Obsolete, LTB, NRND, PN Change, or Transferred** – One or more manufacturer parts on AML is obsolete or near EOL which presents a sourcing risk. A warning icon will also display on the tab. Other manufacturer parts may be unknown, but none are known to be Preliminary or Active.
  - LTB = Last Time Buy
  - NRND = Not Recommended for New Designs
  - PN Change = Part Number Change

You can view details on:

- The manufacturer part’s lifecycle state and its AQ, which indicates how confident Paradata is that the value is accurate
- Prescribed [part equivalents](#) that are Preliminary or Active (and not Not RoHS Compliant)
- [Recent updates](#)

Click the MFR PART link from the Approved Manufacturer Parts or the Prescribed Part Equivalents to go to the part’s Details tab.
**RoHS**

The **RoHS** tab displays information related to compliance state.

The tab itself provides an indication of the compliance status, as noted below. This is the value that displays for the item's RoHS in the Materials table.

- **Dash (-) or Unknown** – The compliance state for all AML parts is unknown
- **Compliant, Exempt, or Not Applicable** – AML parts are a mixture of compliant, exempt, and not applicable, other manufacturer parts may be unknown
- **Not Compliant** – One or more manufacturer parts on AML is Not Compliant, which presents a sourcing risk. A warning icon will also display on the tab. Other manufacturer parts may be a mixture of any other statuses

You can view details on:

- The manufacturer part’s RoHS compliance state and its AQ, which indicates how confident Paradata is that the value is accurate
- Prescribed [part equivalents](#) that are compliant (and not obsolete or near EOL).
- Recent updates

Click the MFR PART link from the Approved Manufacturer Parts or the Prescribed Part Equivalents to go to the manufacturer part's Details tab.

**Avg Lead Time**

The Avg **Lead Time** tab displays information related to the average factory lead time for the parts on AML. You can view details on:

- The factory lead time of AML parts. A long lead time is greater than 60 business days (or 12 weeks).
- Prescribed [part equivalents](#) that have a lower lead time.
- Updates

Click the MFR PART link from the Approved Manufacturer Parts or the Prescribed Part Equivalents to go to the manufacturer part’s Details tab.

**View Update History**

You can track the updates that occurred for a manufacturer part, such as changes to lifecycle information, lead time changes, compliance details, new part equivalents, sourcing status, and new prices. After drilling into the manufacturer part information, click the History tab. The History tab includes the date of the update, type of update, the new information retrieved during this update, as well as the previous data.

Click the Manufacturer Part link from the Recent Updates area (of any tab) to go to the manufacturer part’s History tab.

**Drill Into the Manufacturer Part Information**

When a manufacturer part is Enriched or Matched, given the Manufacturer and Manufacturer Part Number in the uploaded BOM, the Paradata Platform fills in the manufacturer part details.
After drilling into the project details, click **Materials** to open the flat list of items.

Click the item row to open the **Item Details contextual side pane** and view the item’s AML.

Click on the manufacturer part link to view part details, prices, where used, or history, depending on the context of the link in the Item Details contextual side pane.

The manufacturer part details include:

- **Manufacturer Part Summary** – The manufacturer part summary allows you to quickly assess the overall part quality.
  - Lifecycle is green for Active or Preliminary, or orange for unknown or any other state.
  - RoHS is green for Compliant, Exempt, or Not Applicable, or orange for unknown or Not Compliant.
  - Factory lead time is green for values less than or equal to 60 business days, and orange for unknown or greater than 60 business days (or 12 weeks).
- **Details** - The manufacturer part parametrics including datasheet, RoHS compliance statement, and product photo. Each parametric has an authenticity quotient (AQ) that indicates how confident Paradata is that the value is accurate.
- **Prices** - The public and private prices available from various sources and the full price provenance.
- **Part Equivalents** – Both the BOM-implied and Paradata-identified part equivalents for this manufacturer part.
- **Where Used** - Where this manufacturer part is used across your projects and the extended quantity.
- **History** - A historical list of updates for the manufacturer part. Applicable for BOM Advantage users when you drill into the manufacturer part from a project.

Click the **Back** link to return to the Materials view from which you navigated to this manufacturer part.

Refer to the “Parts Advantage How-To Guide” for details.

**How to Navigate the Part Catalog**

From the left-side navigation bar, select **Catalog**. Refer to the “Parts Advantage How-To Guide” for details.

**How to Manage Your Profile Settings**

Click the top left corner to access your Profile Settings. From here, you can see your user role, update your name and email address, upload your profile picture, change your password, reset tips and info, subscribe to notifications, and log out.
For more information about the individual roles, see [Team Info](#).

**Update Your Name and Email**

Click the top left corner to access your profile settings. In the General Information section, you can see and edit your name and email address.

Your name is displayed in the top left (when the left-side navigation is expanded).

**Note:** Your username is your email address. If you change your email address, you are also changing your username.

Click the **Save** button in the top right to save any updates to your name, email address, or profile picture.

**Upload Your Profile Picture**

Click the top left corner to access your Profile Settings.

If you haven’t uploaded a profile picture before, you’ll see a generic person image in the top left to click.

In the General Information section, click the **Choose Image** button to select your profile picture to upload. The picture should be in PNG, BMP, or JPEG format.
After you have chosen an image, you will have the option to **Upload New Image**.
Click the **Save** button in the top right to save any updates to your name, email address, or profile picture.

**Change Your Password**
Click the top left corner to access your Profile Settings.
In the General Information section, click the **Change Password** button to change your password. You will be prompted to enter your current password, a new password, and to repeat the new password. Click the **Save** button.

**Reset Your Tips and Info**
Click the top left corner to access your Profile Settings.
In the Tips & Info section, you can click the **Reset Welcome Tour** button to reactivate the tips screen displayed on your initial login.
Change Your Notification Settings
Click the top left corner to access your Profile Settings.

By default, you are subscribed to receive all notifications.

In the Notifications Settings section (at the bottom of the page), you can uncheck notification types that you don’t want to receive.

<table>
<thead>
<tr>
<th>Notification Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Version finished automatically rerunning</td>
<td>Notifies all subscribed users when Paradata BOM Advantage automatically reruns a project version. The system automatically reruns all projects every week. This notification describes the important updates.</td>
</tr>
<tr>
<td>Version finished rerunning</td>
<td>Notifies all subscribed users when a user manually reruns a project version.</td>
</tr>
<tr>
<td>The BOM successfully uploaded</td>
<td>Notifies all subscribed users when a new project is successfully created or a new version of an existing project is successfully processed.</td>
</tr>
<tr>
<td>The BOM failed to upload</td>
<td>Notifies all subscribed users when a new project or new version fails to upload.</td>
</tr>
</tbody>
</table>

Log Out of Paradata Advantage Suite
Click the top left corner to access your Profile Settings.

In the top right corner of the Profile Settings, click the **Logout** button to exit Paradata Advantage Suite.

How to View and Manage Company Settings
From the left-side navigation bar, select **Company Settings**.

From here, you can manage **team info**, **field mappings**, **custom item terms**, and **public price suppliers**.

Manage Team Info
From the left-side navigation bar, select **Company Settings**, then click the Team Info tab.

**Note:** You must have the Account Owner role to manage team info.

There are three user roles:

- Viewer – can view everything, search the catalog, rerun projects, configure cost comparison, filter, search, sort, and hide/show columns.
- Editor – can do everything a Viewer can, plus create new projects and new versions, archive and restore projects, upload and delete prices, manage field mappings and custom item terms.
- Account Owner – can do everything an Editor can, plus manage team info and set public price suppliers.

Click the **Invite Member** button to access the Invite Member dialog. **Enter** the user’s name and email address, and assign the user a role, then click the **Send Invite** button to send an invitation to that person to join the team.

Click the **Edit Role** link to change the user’s role. Assign the new role, and click the **Save** button.

Click the **Remove User** link to revoke the user’s access to Paradata Advantage Suite.
Manage Field Mappings
From the left-side navigation bar, select **Company Settings**, then click the Field Mappings tab.

**Note:** You must have the Account Owner or Editor role to manage field mappings.

In the Field Mappings, you can click on a heading name (for example, Manufacturer Part Number) and see the various terms used in project BOMs (common names might be MPN, Manufacturer P/N, or MFR Part).

You can type in a name and click the **Add** button to add other terms to match to that heading name.

You can click the **Edit** link to either modify the term and click the **Save** button, or click the **Delete** button to remove that term from the list.

Manage Custom Item Terms
From the left-side navigation bar, select **Company Settings**, then click the Custom Item Terms tab.

**Note:** You must have the Account Owner or Editor role to manage custom item terms.

Click the **Edit** link to modify the term and click the **Save** button, or click the **Delete** button to remove that term from the list.
When the project is processed (by initial upload or new version), the system looks for item descriptions that start with the custom parts key terms. If there is a match, the system labels those items as Custom (or non-sourceable).

You can also enable or disable the setting for custom parts having the same internal part number and manufacturer part number. When this setting is checked and you upload a BOM where items have an internal part number that is the same as the manufacturer part number, those items are automatically set as custom. This setting only affects new BOMs that are uploaded.

**Public Price Suppliers**

From the left-side navigation bar, select **Company Settings**, then click the Public Price Suppliers tab.

**Note:** You must have the Account Owner role to manage which public price suppliers are used for public prices in projects.

The page lists all the suppliers/distributors from whom we have public prices. You can deselect a supplier to exclude all prices from that supplier for your company’s projects, and click **Save**.

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**Custom Item Terms**

On project upload or rerun, the system flags items as custom (non-sourceable) when the description starts with one of the key terms listed.

<table>
<thead>
<tr>
<th>TERM</th>
<th>PART TYPE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>chemicals</td>
<td>Custom</td>
<td>Edit</td>
</tr>
<tr>
<td>pkg</td>
<td>Custom</td>
<td>Edit</td>
</tr>
<tr>
<td>pub</td>
<td>Custom</td>
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<td>tbl</td>
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<td>Edit</td>
</tr>
<tr>
<td>label</td>
<td>Custom</td>
<td></td>
</tr>
</tbody>
</table>

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The supplier selections are reflected in your project after the version is rerun. All projects are automatically rerun weekly, or you can manually rerun a project version. See Rerun version for details.

How to Share Feedback with Paradata
If you would like to let us know what you like or make suggestions for improvements, please share your feedback with Paradata.

Navigate to the feedback area from the left-side navigation bar.

Feedback

Share feedback with Paradata

Subject

[Subject]

Comments

[Comments]

[Submit]

Enter a subject and your feedback, then click the Submit button.

How to Access Documentation
If you need help figuring out the system, click Help in the left-side navigation bar to access documentation, videos, and release updates.

How to Email Support
If you encounter any issues with the product or this documentation, please email support@paradata.io.

Where to Access Paradata Advantage Suite Version Details
From the left side navigation bar, click the Paradata logo.
You will then see a dialog with details about which version of Paradata Advantage Suite you are using. Click the Close button to close the dialog and return to the Paradata Advantage Suite workspace.