

TechTip: Sourcing

General requirements

- You are signed in to the Eplan Cloud. [Learn more](#)
- You are a member of an Eplan Cloud company organization. [Learn more](#)
- You have been assigned a role for the app “Sourcing”. [Learn more](#)
- You have opened the app “Sourcing”.

Introduction

With the app “Sourcing” you can check the availability, stock and delivery times of parts at an early stage. To this purpose you upload bills of materials that are then automatically synchronized with a product database of Eplan and the data from the online shops of the suppliers.

Roles

There are three roles for the app “Sourcing” that come with certain rights and limitations. The following roles are available to you (starting with the role with the most rights):

- **Admin:** Users with this role have access to the full functional scope of the app.
- **Engineer:** Users with this role have editing rights for the **Bills of materials** and **Documents** areas. You can create and edit workspaces and projects as well as upload bills of materials.
- **Purchaser:** Users with this role have read rights for workspaces, projects, and bills of materials.

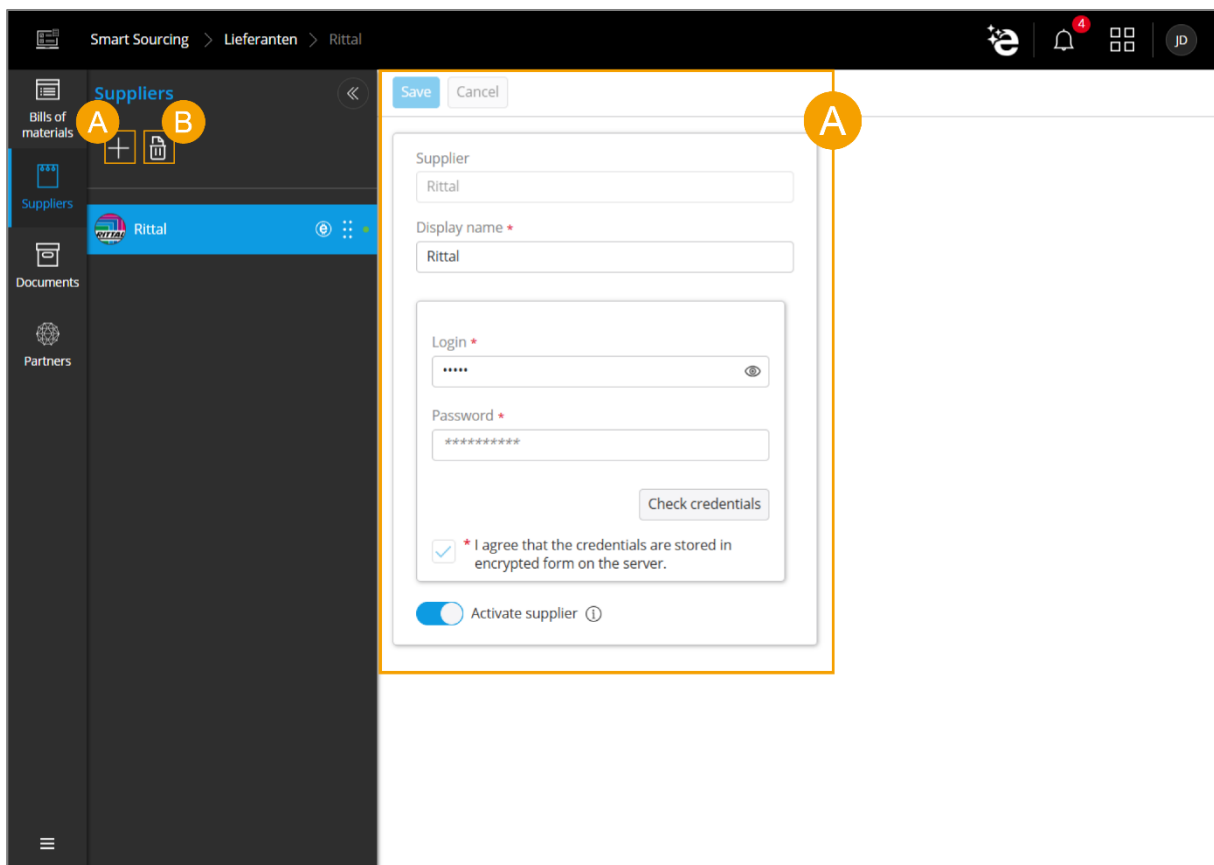
Suppliers

! The **Suppliers** area is only available to users with the role "Admin".

Requirements

- The suppliers are registered in the Eplan Cloud.
- The suppliers were connected via an API interface by Eplan.

In order to synchronize a bill of materials with the data from the online shop of a supplier, the corresponding supplier must first be added. The sign-in data for the online shop of the supplier may be required for the authentication.

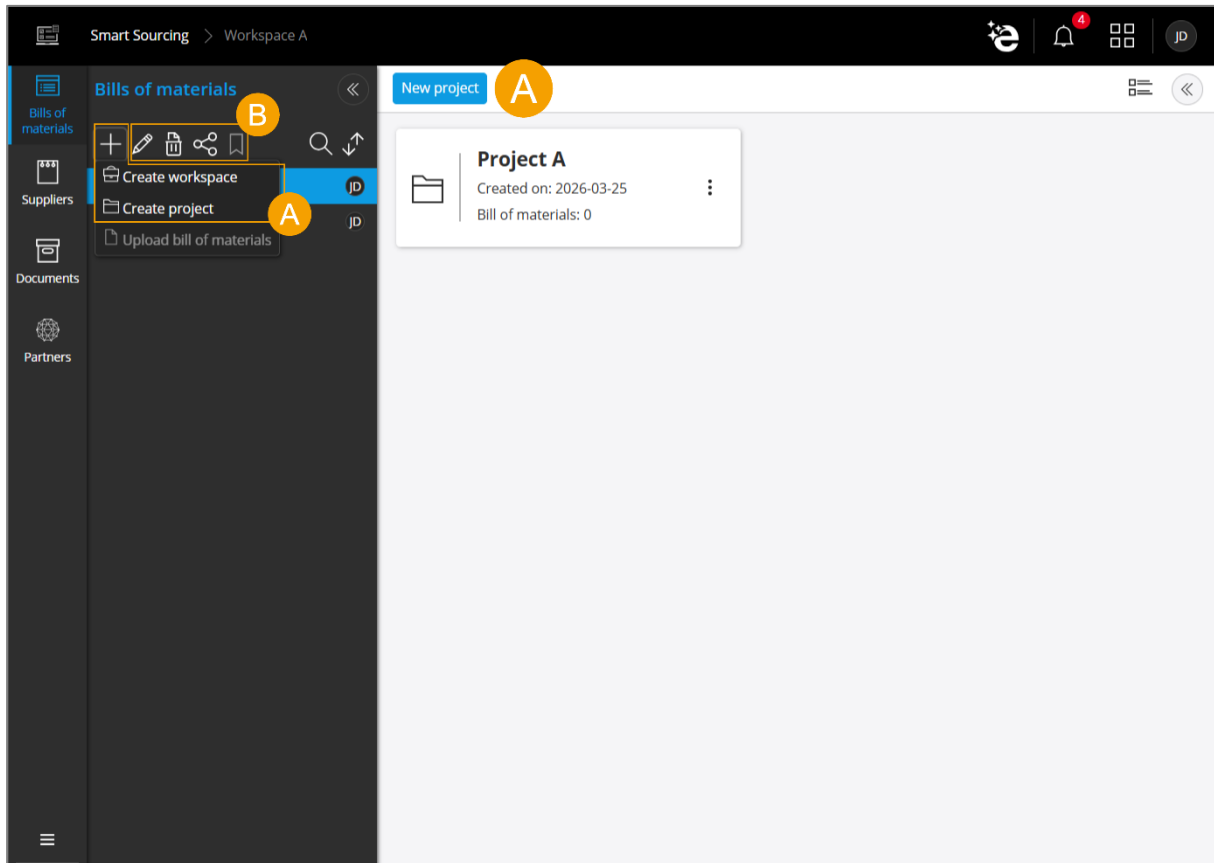


- A) Add supplier and connect with online store
- B) Delete supplier

Workspaces and projects

Workspaces and projects support you in organizing your bills of materials. A workspace can contain multiple projects.

Workspaces can be shared with other users. The projects and bills of materials contained in the workspaces are then also shared.



- A) Create workspace and project
- B) Further actions for workspaces and projects, e.g. **Rename**, **Delete** and **Share**

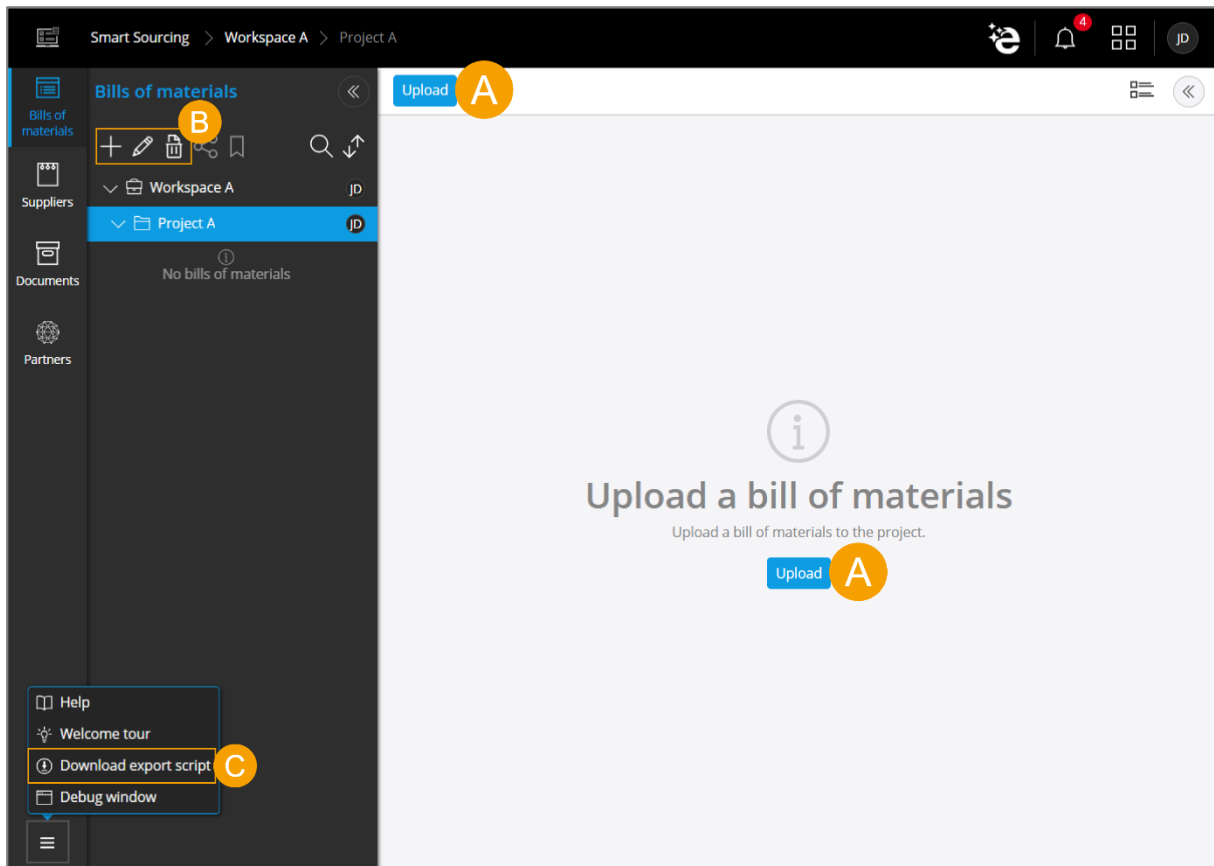
Note

Certain actions (e.g. **Share**) are only available for workspaces.

Bills of materials can only be uploaded to projects.

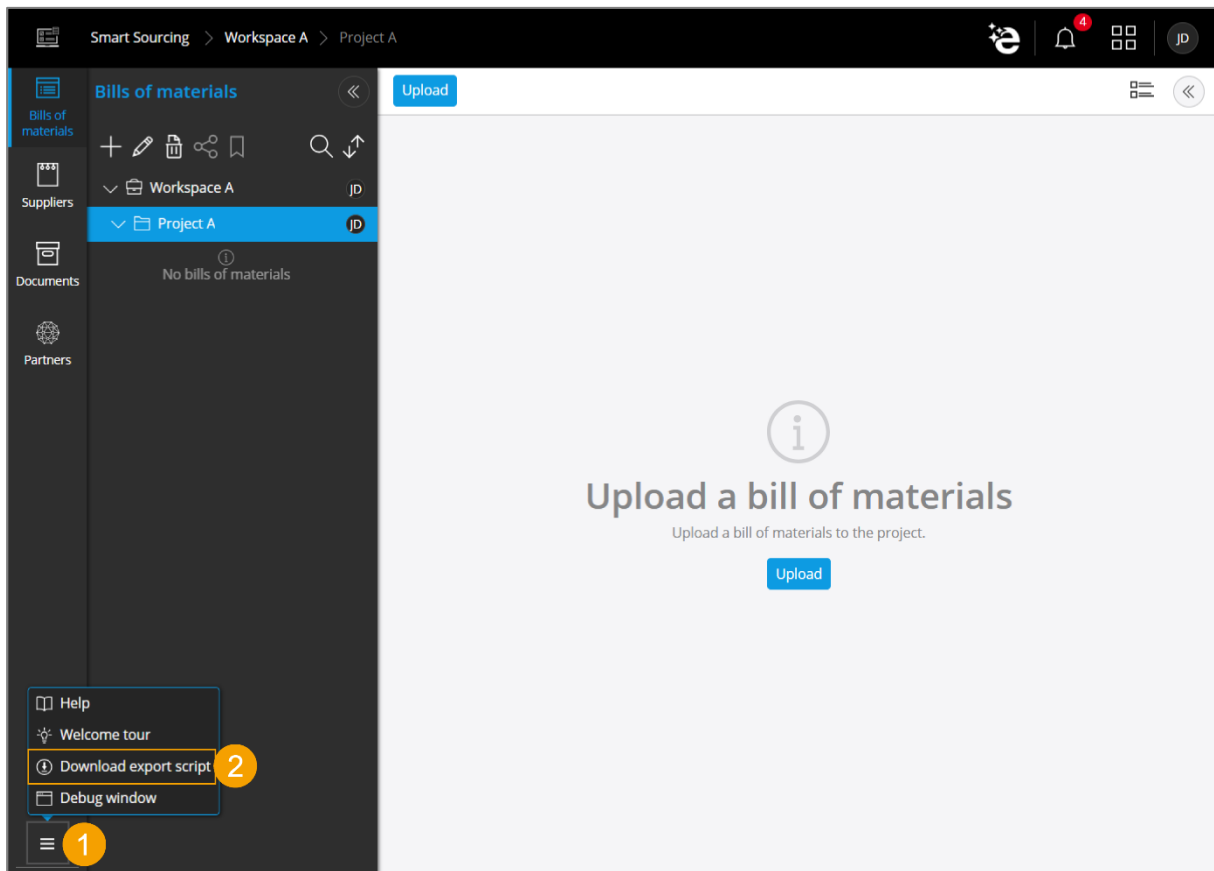
Bills of materials

A bill of materials can either be created manually or be exported from an Eplan project in an installed Eplan solution (for example Eplan Electric P8). If you want to use the bill of materials of an Eplan project, you have to load a script in the installed Eplan solution once. The script ensures that the bill of materials is exported in a suitable format and is provided in the app “Sourcing”.



- A) Upload bill of materials
- B) Further actions for bills of materials, e.g. **Rename** and **Delete**
- C) Download script for Eplan Electric P8

Download script for installed Eplan solution

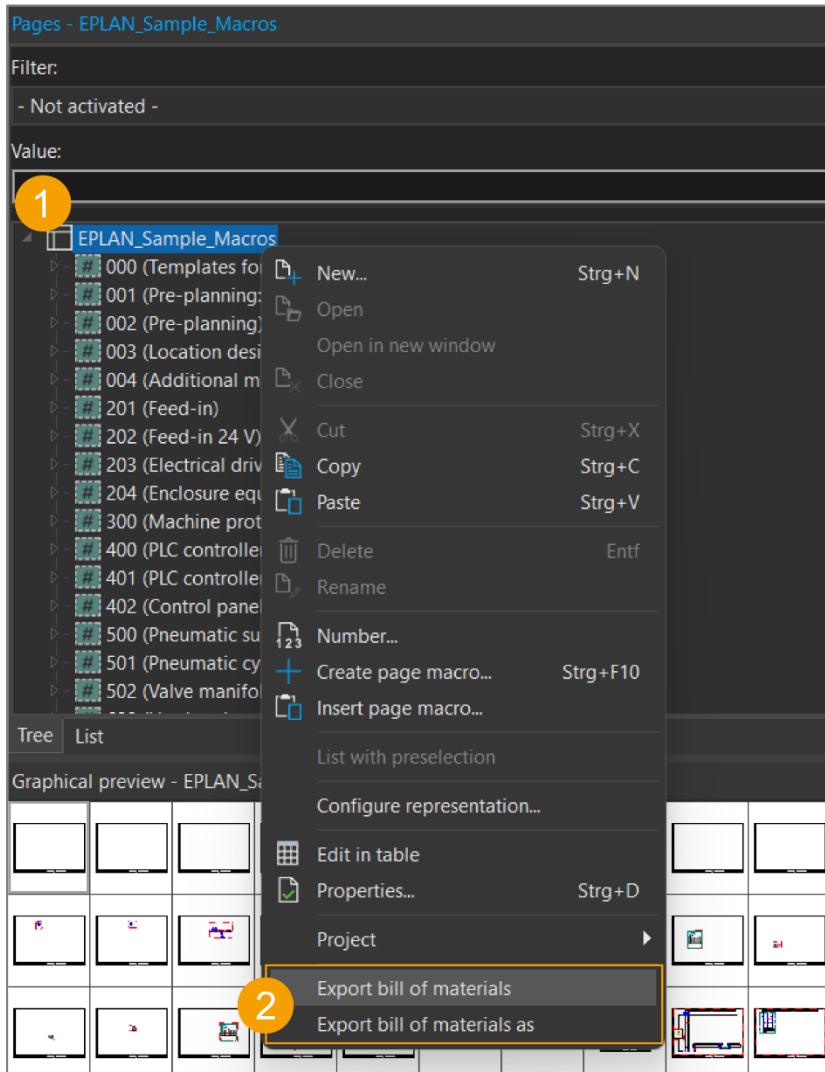


1. Open the menu in the navigation bar.
 2. Click **Download export script**.
- ⇒ The script is downloaded.

Export bill of materials from Eplan project

Requirements

- You have opened an installed Eplan solution (e.g. Eplan Electric P8).
- You have loaded the script from the app “Sourcing”. Further information about loading and removing scripts can be found [here](#).
- You have opened a project.



1. Select a project in the page navigator.
 2. Click the popup menu item **Export bill of materials**.
- ⇒ The bill of materials is exported.

Tip

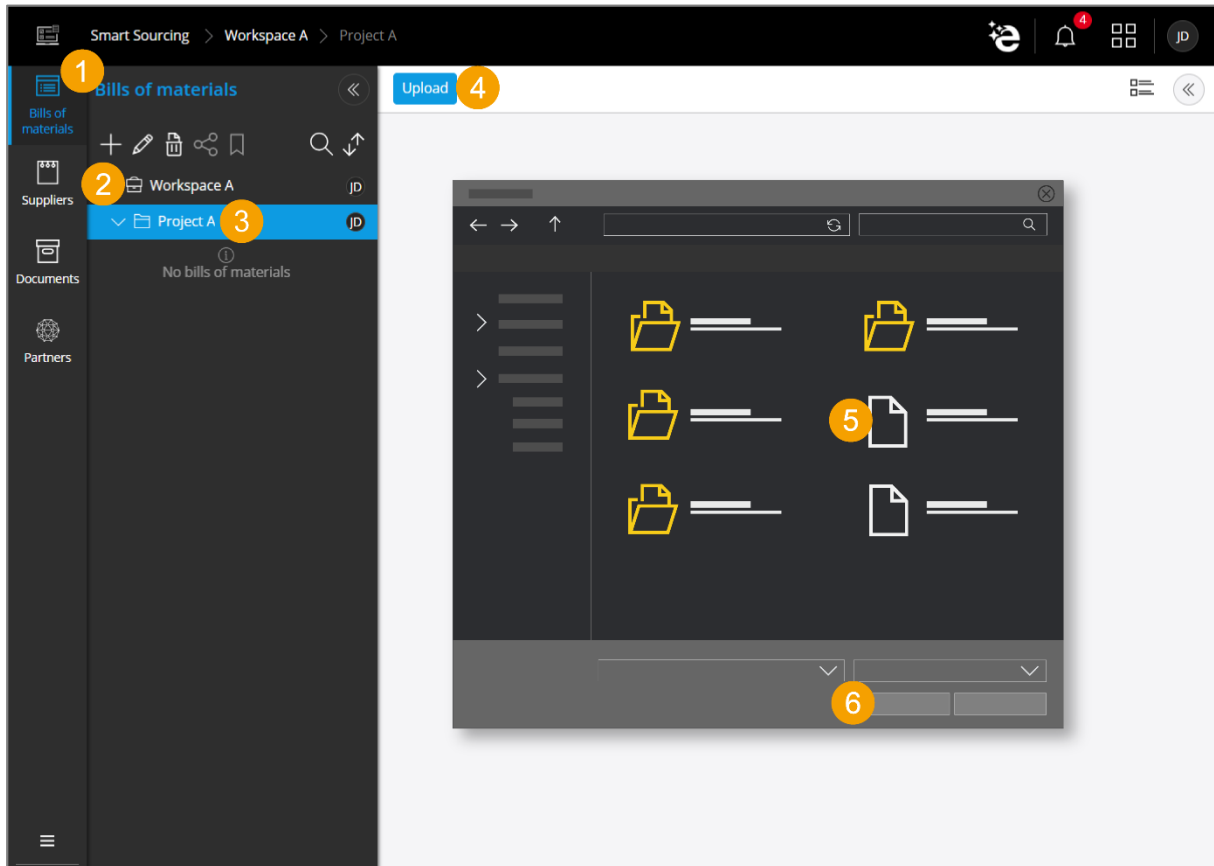
You can specify the storage location and the file format (*.xml, *.xlsx) of the bill of materials yourself by clicking **Export bill of materials as**.

Upload bill of materials

Requirements

- You have opened the app “Sourcing”.

- You have created a workspace.
- You have added a project to the workspace.
- The bill of materials is available as an XLSX or XML file.



1. Click **Bills of materials** in the navigation bar.
 2. Select a workspace in the selection area.
 3. Select a project.
 4. Click **Upload** in the defined working section.
 5. Select a file (*.xlsx, *.xml) from the subsequent dialog.
 6. Click **Open**.
- ⇒ The bill of materials is uploaded and the parts are identified automatically.
- ⇒ The availabilities, stocks and delivery times of the parts are displayed.

Note

You can upload several bills of materials into a project. When you upload a new bill of materials, the previously uploaded bill of materials is moved to the **Other versions** drop-down list within the project.

The **Update all** and **Update supplier data** buttons are available in the defined working section in order to identify the parts of a bill of materials again and to update the supplier data.