



iPoint

iPCA

AIC

V11.12.000 onwards

AIC User Manual

iPoint-systems gmbh
Ludwig-Erhard-Straße 58
72760 Reutlingen

Tel +49 7121 14489 60
Fax +49 7121 14489 89
info@ipoint-systems.de

Director: Jörg Walden
Amtsgericht Reutlingen · HRB 353830
USt.-Id.Nr. DE813135964

Imprint

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iPoint-systems gmbh
Ludwig-Erhard-Strasse 58
72760 Reutlingen
Germany

Phone: +49 7121 14489 60

Fax: +49 7121 14489 89



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1 Introduction

1.1 General

This document describes the functionality of the iPCA module Automated Inbox Check (iPoint Compliance Agent – AIC).

Information about the usage of the products is available in the corresponding documents.

Parts of this documentation may describe optional functions. These optional functions are marked as “optional” in the documentation.

Some functions are available only if a particular application privilege is granted to the user. If a required functionality is not available for you, please contact your internal administrator.

2 Support

For any questions about the application, please contact your in-house administrator.

This administrator will check and answer your enquiry.

If your in-house administrator cannot solve the problem, he will contact iPoint-systems gmbh to get a solution for it.

It is important that only the in-house administrator contacts iPoint-systems gmbh as this is the only way to get a fast response and to avoid doing the work twice.

3 New functions

Version	Description
11.12.000	Added AIC whitelist feature
9.10.001	Initial release of AIC

4 Check of datasheets received from suppliers

Datasheets submitted by suppliers are checked by Automated Inbox Check (AIC) module.

This allows to:

- check received datasheet against appropriate check configuration that could be
 - standard
 - project specific (optional)
 - organization unit specific (optional)
- automatically reject a datasheet if its quality does not comply with minimum requirements on quality of IMDS datasheets
- assign ranking to checks in the check configurations
- automatically calculate quality score of the datasheet based on the performed checks and defined ranking

4.1 Check process and logic

Received datasheets are automatically checked upon their download from the IMDS online system. This process consists of few stages depending on the configuration and quality of the datasheet (see **Figure 1**).

4.1.1 Automatic check stage 1

This check stage is done only in case that at least one of the checks in the check configuration for check of supplier datasheets is assigned to the check category “**Automatic rejection**”.

In case that at least of these checks failed and and the configuration parameter “**AIC_STOPCHECK_ON_ERROR**” is set to “**TRUE**” (see **chapter 6.4.1**), received datasheet is automatically rejected notifying the supplier about the issues found during this check.

PLEASE NOTE: It is very important, that the checks are assigned to the check category “**Automatic rejection**” upon careful companywide decision based on the requirements on the minimum quality level on received MDSs.

4.1.2 Automatic check stage 2

This check stage is done only in case that at least one of the checks in the check configuration for check of supplier datasheets is assigned to the check category “**Precheck**” or “**Manual check**” and one of below cases is true:

- all checks from **chapter 4.1.1** are successfully passed
- at least one check from **chapter 4.1.1** failed and the configuration parameter “**AIC_STOPCHECK_ON_ERROR**” is set to “**FALSE**” (see **chapter 6.4.1**)
- checks from **chapter 4.1.1** were not done at all

4.1.3 Manual checks

Upon automatic check stage 2 (see **chapter 4.1.2**) is done and the datasheet is not automatically rejected, the MDS needs to be further manually checked in order to accept or reject it.

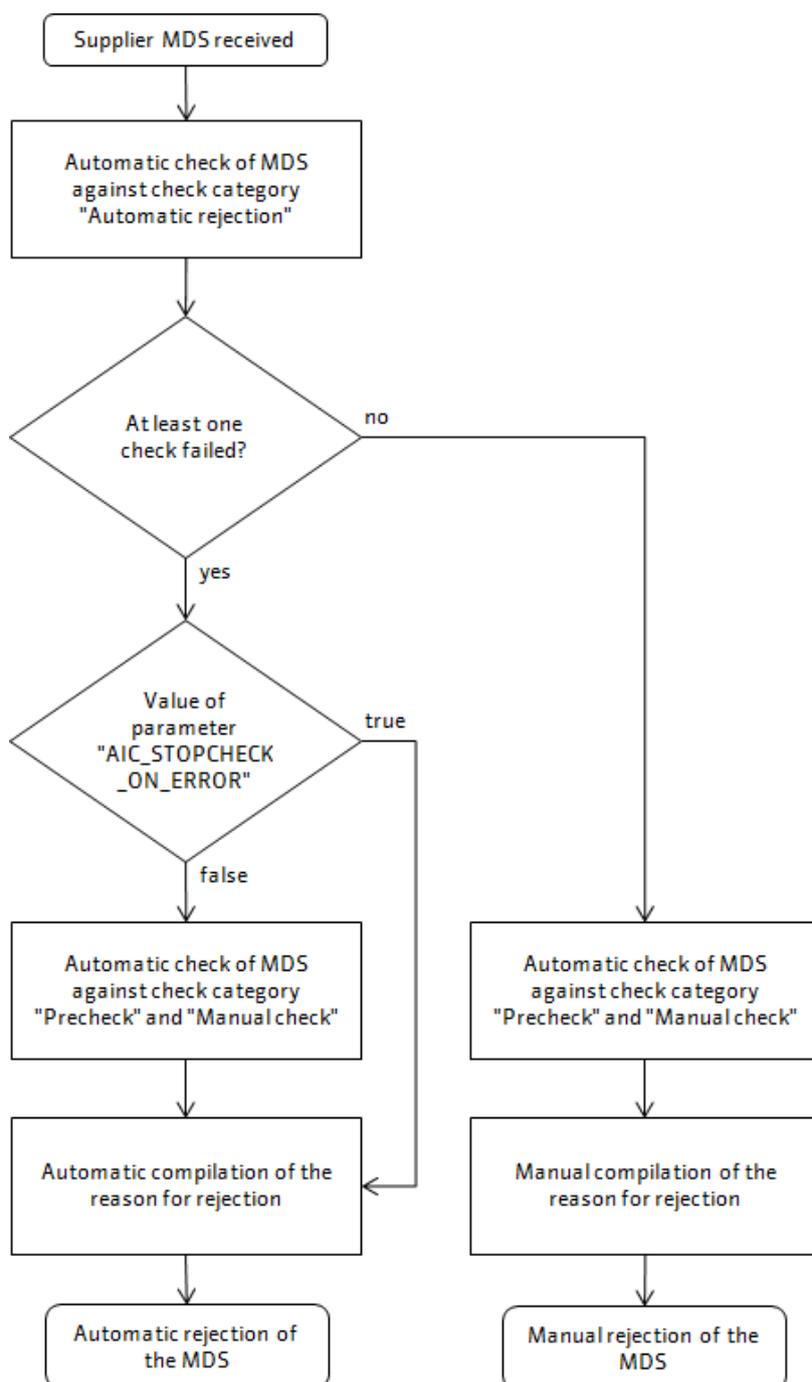


Figure 1 Workflow of check of received MDS

4.2 AIC statuses

Following AIC statuses could exist for received datasheets based on the result of the AIC check:

Automatic rejection	Precheck	Manual	Status
			Not checked (either MDS was already accepted/rejected/cancelled when downloaded or accepted/rejected when MDS was not checked yet)
			MDS was not checked yet – check is pending
			Automatic rejection check OK, precheck OK, no Todos found
			Automatic rejection check OK, precheck OK, open Todos exist
			Automatic rejection check OK, precheck OK, all Todos classified as “No error”
			Automatic rejection check OK, precheck OK, at least one ToDo classified as “Error”
			Automatic rejection check OK, precheck found at least one error, no Todos found
			Automatic rejection check OK, precheck found at least one error, open Todos exist
			Automatic rejection check OK, precheck found at least one error, all Todos classified as “No error”
			Automatic rejection check OK, precheck found at least one error, at least one ToDo classified as “Error”
			Automatic rejection check found at least one error, precheck and manual check not done as MDS was automatically rejected
			Automatic rejection check found at least one error, precheck OK, no Todos found
			Automatic rejection check found at least one error, precheck OK, open Todos exist
			Automatic rejection check found at least one error, precheck OK, all Todos classified as “No error”
			Automatic rejection check found at least one error, precheck OK, at least one ToDo classified as “Error”
			Automatic rejection check found at least one error, precheck found at least one error, no Todos found
			Automatic rejection check found at least one error, precheck found at least one error, open Todos exist
			Automatic rejection check found at least one error, precheck found at least one error, all Todos classified as “No error”
			Automatic rejection check found at least one error, precheck found at least one error, at least one ToDo classified as “Error”

Table 1 List of possible AIC statuses

4.3 Calculation of final quality score of received datasheet

Once all automatic check stages are accomplished, the quality score of the received datasheet is calculated. This helps to provide an overall picture about the quality of the datasheet that passed AIC check without an automatic rejection.

For the calculation of the MDS quality score, only checks assigned to the check category “**Precheck**” are considered. Checks assigned to the check categories “**Automatic rejection**” and “**Manual check**” are not considered.

By default, below listed formula is used for calculation of final quality score:

$$Quality\ score = Ranking_{serious} \times No_{serious} + \frac{Ranking_{medium} \times No_{medium}}{No_{nodes}} + \frac{Ranking_{low} \times No_{low}}{No_{nodes}} + Ranking_{analyze} \text{ (if } No_{analyze} > 1)$$

Where:

- **Ranking_{serious}**
Weight defined for “**Serious error**” check category
- **Ranking_{medium}**
Weight defined for “**Medium warning**” check category
- **Ranking_{low}**
Weight defined for “**Low warning**” check category
- **Ranking_{analyze}**
Weight defined for “**Warning to be analyzed**” check category
- **No_{serious}**
Number of checks with ranking “**Serious error**” failed
- **No_{medium}**
Number of checks with ranking “**Medium warning**” failed
- **No_{low}**
Number of checks with ranking “**Low warning**” failed
- **No_{analyze}**
Number of checks with ranking “**Warning to be analysed**” failed
- **No_{nodes}**
Number of nodes of analyzed MDS

The formula can be modified based on the company requirements and defined check categories (see **chapter 6.1.1**). For details about how to change the formula, see **chapter 6.4.2**.

Based on the calculated quality score of received datasheet and the quality thresholds defined in “**AIC Parameters**” screen (see **chapter 6.2.1**), the final quality score is set for MDS:

-  MDS NOK, the calculated quality score is above the maximum quality threshold
-  MDS to be analyzed, the calculated quality score is between the quality thresholds
-  MDS OK, the calculated quality score is below the minimum quality threshold

5 Received tab

The Received tab is split into four areas:

1. Search mask (orange) - see **chapter 5.1**
2. Result list (blue) - see **chapter 5.2**
3. Additional data (green) – see **chapter 5.3**
4. Actions (green) - see **chapter 5.4**

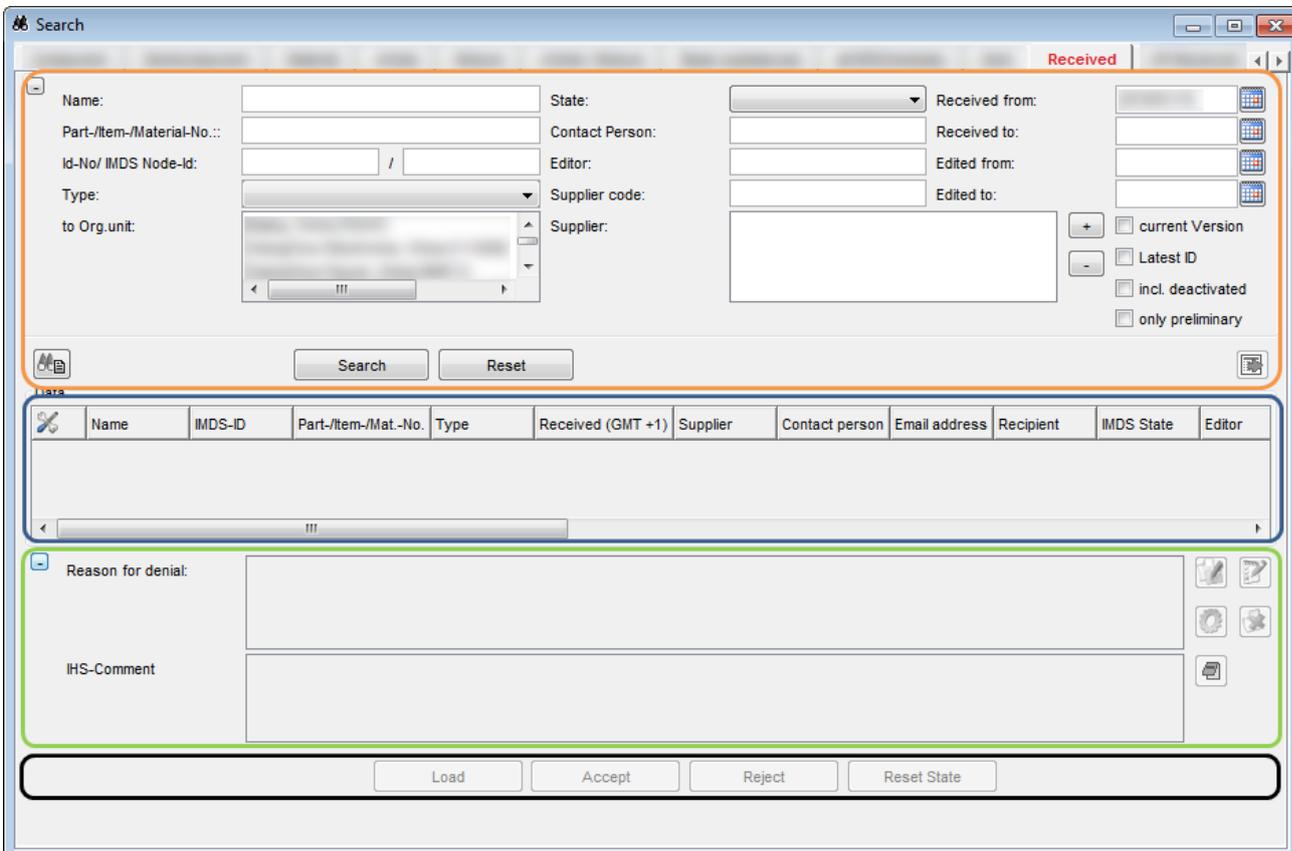


Figure 2 Received tab

5.1 Search mask

Enables to search for received datasheets.

Below listed search criteria is available in addition to the standard search screen for received datasheets:

- **Final quality score**
Calculated quality score of the datasheet based on the defined check configuration and assigned check categories.

- Empty
- MDS NOK, the calculated quality score is above the maximum quality threshold
- MDS to be analyzed, the calculated quality score is between the quality thresholds
- MDS OK, the calculated quality score is below the minimum quality threshold

If no value is selected from the drop-down list, search is performed for datasheet regardless of the final quality score.

For remaining search criteria, please check standard IHS user manual, **chapter 10.3**.

5.2 Result list

The result list displays received datasheets as per defined search criteria.

Below listed search criteria is available in addition to the standard search screen for received datasheets:

- **AIC**
Result from the AIC check.
For details see **chapter 4.2**.
- **Final quality score**
Calculated quality score of the datasheet based on the defined check configuration and assigned check categories:
 - Empty – Final quality score is not calculated
 -  - MDS NOK, the calculated quality score is above the maximum quality threshold
 -  - MDS to be analyzed, the calculated quality score is between the quality thresholds
 -  - MDS OK, the calculated quality score is below the minimum quality threshold

For remaining items in the result list, please check standard IHS user manual, **chapter 10.3**.

The order of the columns in the result list and columns displayed can be managed by the user. For more details see IHS user manual, **chapter 7.4.4**.

The content of the result list could be exported to CSV or XLS(X) format using the button .

5.3 Additional data

This function is standard. For details, please check standard IHS user manual, **chapter 10.3**.

5.4 Actions

The following actions are available:

- **Load**
Loads selected received datasheet.
This function is standard. For details, please check standard IHS user manual, **chapter 10.3**.



- **Accept**
Allows accepting received datasheet.
This function is standard. For details, please check standard IHS user manual, **chapter 10.3**.
- **Reject**
Allows rejecting received datasheet.
This function is standard. For details, please check standard IHS user manual, **chapter 10.3**.
- **Reset State**
Allows resetting acceptance/rejection decision for received datasheet.
This function is standard. For details, please check standard IHS user manual, **chapter 10.3**.

6 Master data, parameters, check configuration and configuration parameters

6.1 Master data

6.1.1 Check categories

This master data panel allows to define check categories used for the definition of the weight for checks in the check configuration for received datasheets (see **chapter 6.3.1**).

It can be accessed from the menu “**Extras → Master Data → Check categories**”.

The check categories master data panel is split into four areas:

1. List of check categories (orange) - see **chapter 6.1.1.1**
2. Details of check category (blue) - see **chapter 6.1.1.2**
3. Change log table (black) - see **chapter 6.1.1.3**
4. Actions (green) - see **chapter 6.1.1.4**

PLEASE NOTE: Only user with activated permission “**ADMIN_IMDS_AIC**” can access check categories master data panel.

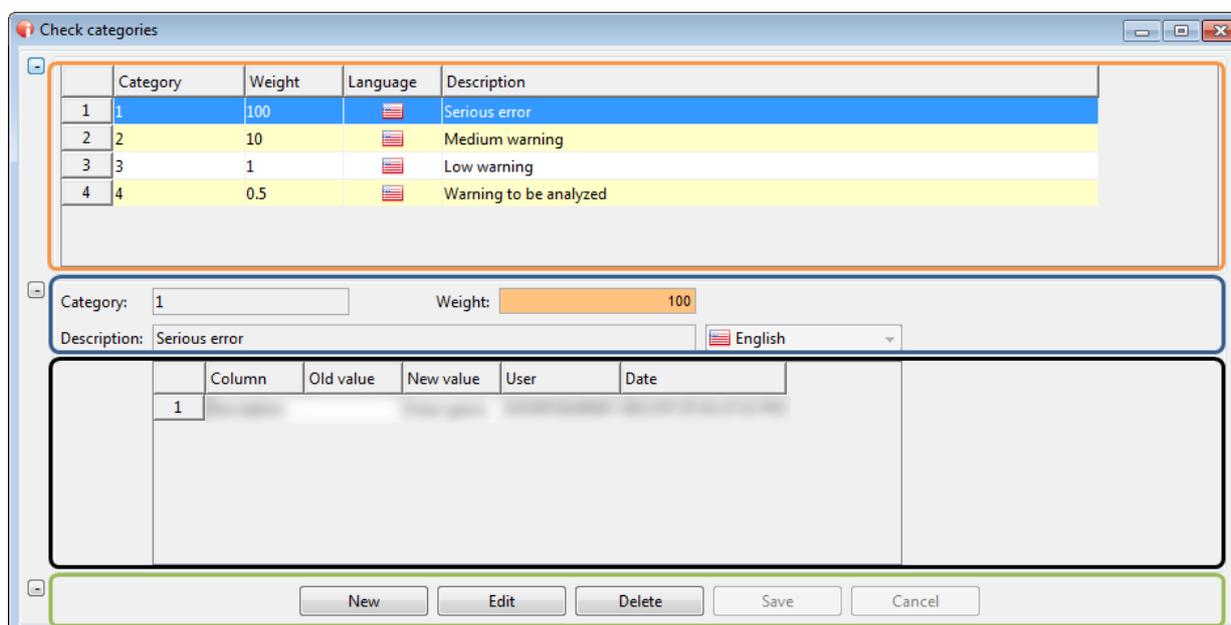


Figure 3 Check categories master data panel

6.1.1.1 List of check categories

Displays the list of all existing check categories.

Upon selection of the entry, all its details are displayed in the details of check category area.

Following information is available:

- **Category**
Internal ID of the check category generated upon first save of the check category.
- **Weight**
Weight defined for the check category.
This is used for the calculation of the quality of the received MDS from the supplier.
- **Language**
Language flag of the check category description shown.
- **Description**
Description of the check category shown in the language of the application.

	Category	Weight	Language	Description
1	1	100		Serious error
2	2	10		Medium warning
3	3	1		Low warning
4	4	0.5		Warning to be analyzed

Figure 4 List of check categories in the check categories master data panel

6.1.1.2 Details of check category

Display the details of the selected check category or allow definition of a new check category.

Category:	<input type="text" value="1"/>	Weight:	<input type="text" value="100"/>
Description:	<input type="text" value="Serious error"/>		 English

Figure 5 Details of check category in the check categories master data panel

6.1.1.3 Change log table

This table displays change log for a check category selected in the list of check categories.

Following information is displayed:

- **Column**
Name of the detail of the check category defined or changed.
- **Old value**
Previous value of the detail of the check category detail displayed in the first column of the change log table.

If this is empty, the value was defined for the first time so the old value did not exist.

- **New value**

Actual value of the detail of the check category detail displayed in the first column of the change log table.

- **User**

iPCA username of the user who defined new or changed existing value.

- **Date**

Date and time when the particular change was done.



	Column	Old value	New value	User	Date
1					

Figure 6 Change log table in the check categories master data panel

6.1.1.4 Actions

The following actions are available:

- **New**

Empties and activates fields in the details of check category area and wished check category can be defined (see **chapter 6.1.1.4.1**).

- **Edit**

Enables modification of the selected check category (see **chapter 6.1.1.4.2**).

- **Delete**

Deletes selected check category (see **chapter 6.1.1.4.3**).

- **Save**

Saves the new or updated check category.

Upon save, change log table to updated with new or updated values.

- **Cancel**

Cancels the creation or edit of the check category.



Figure 7 Actions in the check categories master data panel

6.1.1.4.1 New

New check category can be created by click on the “**New**” button.

This activates the details of check category area.

Following information must be defined:

- **Weight**
Weight defined for the check category.
Minimum value must be greater than “**0**” and maximum lower than “**1000**”.
- **Description**
Description of the check category.
Multiple languages are supported.
It is mandatory to define the description of the check category in the language, in which the application is started. o define description of the check category in different language, first the language needs to be selected and then the description is to be added.

PLEASE NOTE: Only user with activated permission “**ADMIN_IMDS_AIC**” can create new check category.

6.1.1.4.2 Edit

The details of the selected check category can be modified by click on the “**Edit**” button.

Once all changes are done, check category can be saved by click on the “**Save**” button. To cancel changes, click the “**Cancel**” button.

PLEASE NOTE: Only user with activated permission “**ADMIN_IMDS_AIC**” can edit the check category.

6.1.1.4.3 Delete

An existing check category can be deleted upon its selection and click on the “**Delete**” button. This will bring up a small pop-up window (see **Figure 8**). By click on the “**Yes**” button the check category will be deleted. By click on the “**No**” button, the derogation will be kept.

Assignment of the check category to any check in any check configuration is removed upon the deletion of the check category. Then, the check won’t have any check category defined.

PLEASE NOTE: Only user with activated permission “**ADMIN_IMDS_AIC**” can delete the check category.

PLEASE NOTE: The check categories pre-created by iPoint should not be deleted and recreated otherwise the final quality score of the MDS won’t be calculated correctly!

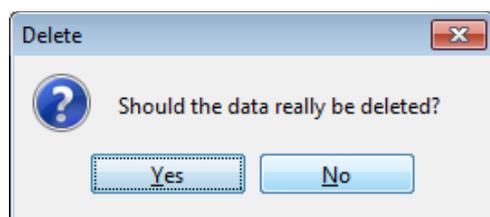


Figure 8 Confirmation of deletion of the check category

6.2 Parameters

6.2.1 AIC Parameter

AIC can be configured using the “**AIC Parameter**” screen, which is accessible from menu “**Options → Parameter → AIC Parameter**”.

The AIC Parameter panel consists of:

1. General settings tab (see **chapter 6.2.1.1**)
2. Email tab (see **chapter 6.2.1.2**)

PLEASE NOTE: Only user with activated permission “**ADMIN_IMDS_AIC**” can access AIC parameters panel.

6.2.1.1 General settings tab

This tab allows defining thresholds used for classification of checked MDS based on the final calculated quality score.

Following mandatory fields must be populated:

- **Minimum quality threshold value**
MDS with calculated quality score below this threshold is marked as correct and gets final quality score with symbol  (see **chapter 4.3**).
- **Maximum quality threshold value**
MDS with calculated quality score above this threshold is consid marked as incorrect and gets final quality score with symbol  (see **chapter 4.3**).

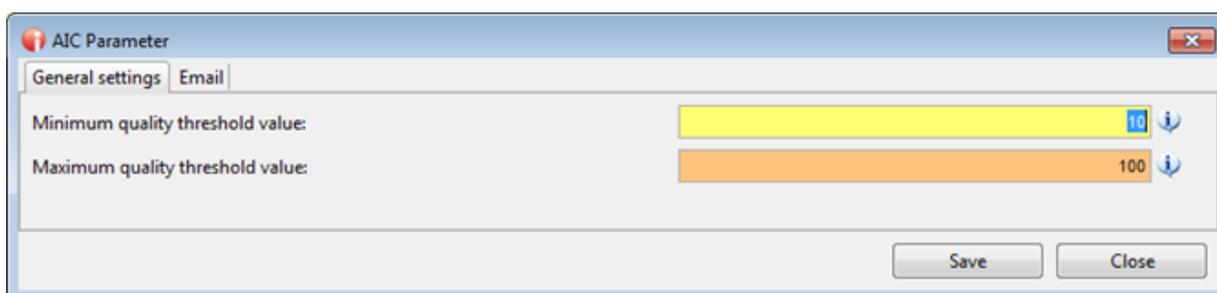


Figure 9 Tab “General settings” in AIC Parameter panel

6.2.1.2 Email tab

This tab allows defining email submission behavior and email texts.

The tab is split into two sub-tabs:

1. General email settings tab (see **chapter 6.2.1.2.1**)
2. Localization tab (see **chapter 6.2.1.2.2**)

6.2.1.2.1 General email settings tab

Following information must/could be defined:

- **Email sender**
The email address, which is used for sending of all rejection emails for MDSs.
This field is mandatory.
- **Rejection reason language**
The language to be taken for results from CSI check.
Possible values: en, de, en;de, de;en
This field is mandatory.
- **Send email**
If this checkbox is checked, the rejection email is send to the supplier of the rejected MDS.
- **Append signature**
If this checkbox is checked, the user signature defined in the user profile will be appended to the rejection email for the MDS.
- **Use user's email address as sender**
If this checkbox is checked, the rejection email for the MDS is send from the email address of the user who processed the MDS.
- **Send copy to sender**
If this checkbox is checked, a copy of the rejection email for the MDS is send also to the sender of the email.

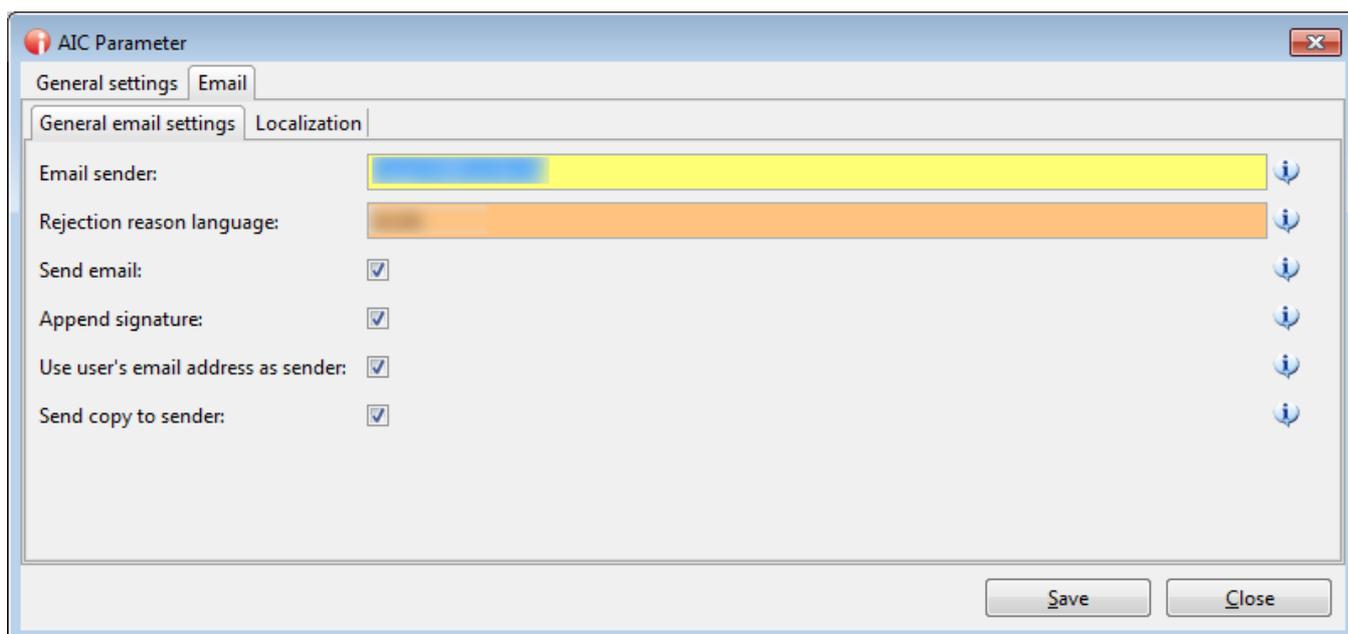


Figure 10 Tab "General email settings" in AIC Parameter panel

6.2.1.2.2 Localization

Following information must/could be defined:

- **Rejection**
Text, which is appended to the reason for denial and to the rejection email for the rejected MDS.
- **Automatic rejection – Email header**
The header of the email sent to the supplier of the MDS.
This email is send is in case the MDS did not pass at least one “**Automatic rejection**” check.
This field is mandatory.

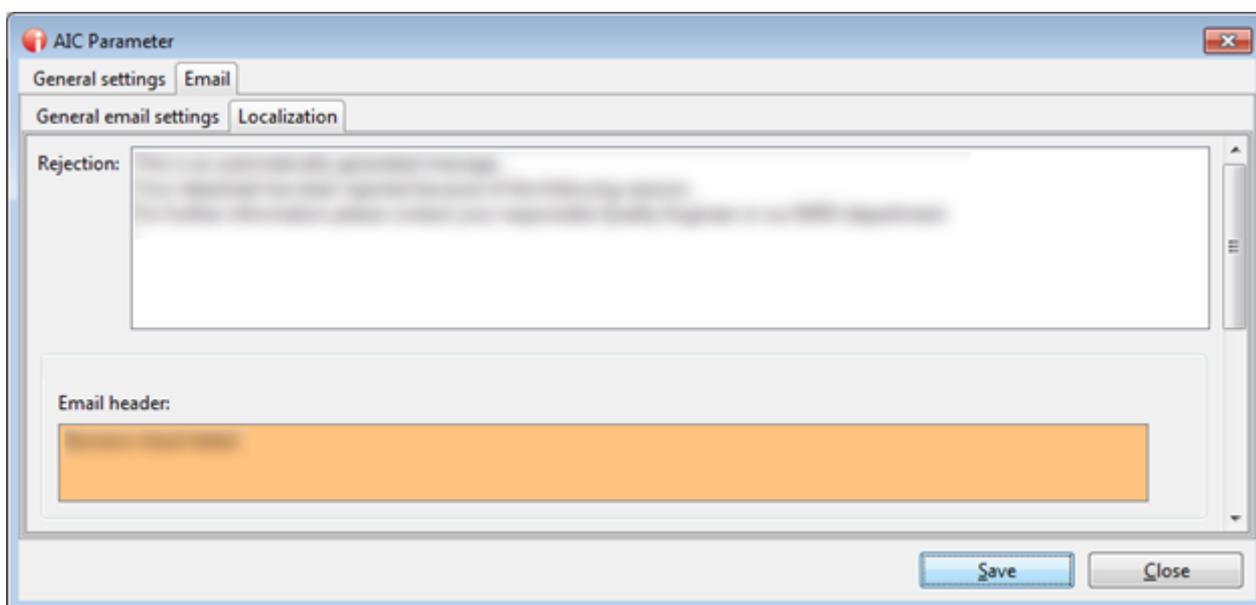


Figure 11 Tab “Localization” in AIC Parameter panel

6.3 Check configuration

To manage the check configuration for check of received datasheets, panel for management needs be opened by navigation to the menu “**Options → Checks → Check configurations...**”.

PLEASE NOTE: Only user with activated permission “**ADMIN_CHECK_CONFIG**” can access and modify check configurations.

The default check configuration relevant for received datasheets has following attributes:

- Configuration No.: 1
- Description: SCM/USC Inbox Check

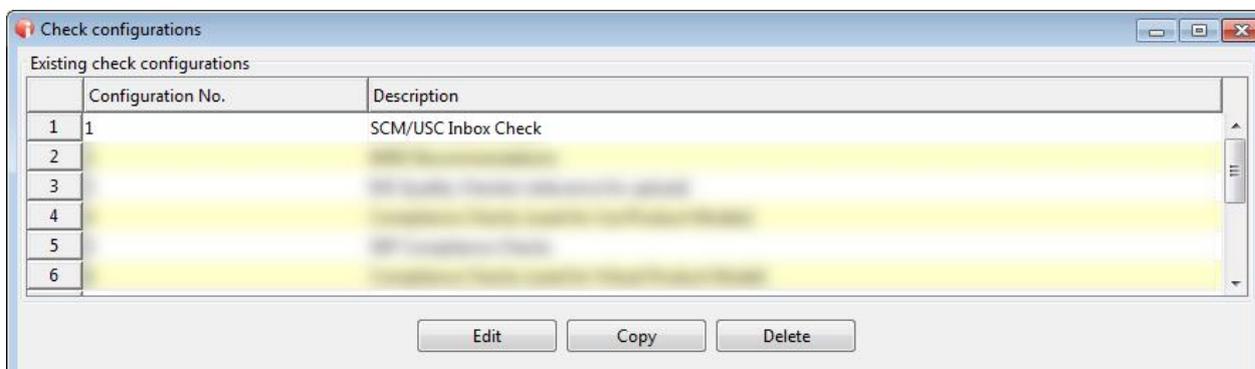


Figure 12 Check configuration panel

For details, please check standard documentation check routines user manual, **chapter 4.2.1**.

6.3.1 Check ranking

To define a ranking for the check, the value from the drop-down list must be selected (see **Figure 13**). Values shown in the drop-down list are from check categories master data. For more details about how to create, edit or delete check categories, please see **chapter 6.1.1**.

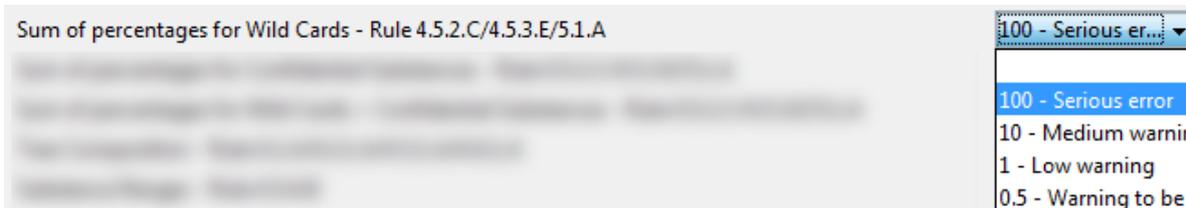


Figure 13 Definition of the ranking for a check

Each check, which is assigned to the check category “**Precheck**” or “**Manual check**”, must have the ranking defined, otherwise the error is shown (see **Figure 14**) and check configuration cannot be saved.

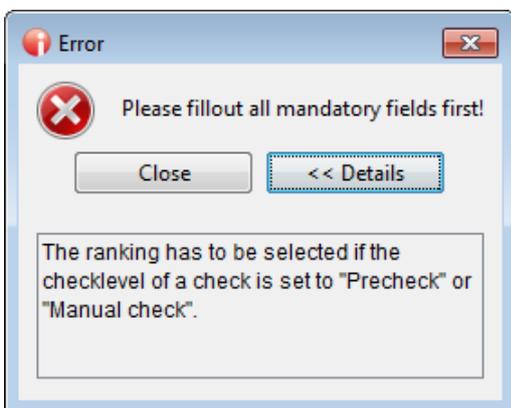


Figure 14 Error shown if the ranking is not defined for all relevant checks

6.4 Configuration parameters

6.4.1 Parameter “AIC_STOPCHECK_ON_ERROR”

By default, if at least one of the checks assigned to the check category “**Automatic rejection**” fails, the reason of rejection is compiled from all failed checks and the datasheet is automatically rejected.

In order to add also messages for checks assigned to check category “**Precheck**” and “**Manual check**”, the value for configuration parameter “**AIC_STOPCHECK_ON_ERROR**” would have to be changed. This would allow supplier receive all important information in order to improve the quality of the MDS even more and mitigate the risk of further rejection of the MDS

Following values for the configuration parameter “**AIC_STOPCHECK_ON_ERROR**” are possible:

- **TRUE**
Only checks assigned to the check category “**Automatic rejection**” are done.
- **FALSE**
All checks are done.

Default value of this parameter is set to “**TRUE**”.

If the parameter is set to “**FALSE**”, all checks could be performed so the supplier gets a complete list of all further errors and not only the serious automatic rejection errors. So the supplier would be able to correct also the minor errors with a submission of the MDS.

6.4.2 Parameter “AIC_QUALITY_SCORE_FORMULA”

The default formula for calculation of the quality score of the datasheet defined in the configuration parameter “**AIC_QUALITY_SCORE_FORMULA**” is as detailed below:

$$\text{rank}_1 * \text{no_checks}_1 + (\text{rank}_2 * \text{no_checks}_2 / \text{no_nodes}) + (\text{rank}_3 * \text{no_checks}_3 / \text{no_nodes}) + (\text{case when no_checks}_4 > 1 \text{ then rank}_4 \text{ else } 0 \text{ end})$$

The formula is written in SQL syntax (e.g. prevent division by 0 or if-else statements written by case-when syntax).

The placeholders (case insensitive) that can be used in the formula are detailed below:

- **Rank_<Id of the category>**
Category of the check category
- **No_checks_<Id of the category>**
Number of failed checks with the ranking of the category Id
- **No_nodes**
Number of nodes (including basic substances) of analyzed datasheet

7 AIC Whitelist (optional)

7.1 General

The AIC Whitelist module allows to exempt the supplier's MDS from the automatic rejection, so that it can be checked manually. This is required in case when the MDS from the supplier was automatically rejected, but in discussion with the supplier it was agreed that the datasheet is correct and the supplier is asked to resubmit formerly rejected datasheet. If previously submitted MDS is added to the AIC whitelist, the newly send one will not be automatically rejected so the MDS will be available for manual check and approval.

7.2 Way to add MDS to the AIC whitelist

The MDS can be added to the AIC whitelist from:

- the result list in the “**Received**” panel (see **chapter 7.2.1**)
- the “**Add to AIC Whitelist**” option in the context menu for parent node of the opened received MDS (see **chapter 7.2.2**)
- the “**Manage AIC Whitelist Tasks...**” master data panel (see **chapter 7.2.3**)

7.2.1 Received panel

By selecting an entry and click on the right mouse button, the context menu is opened.

Following action is added:

- **Add to AIC Whitelist**

Allows to add selected entry to the AIC whitelist.

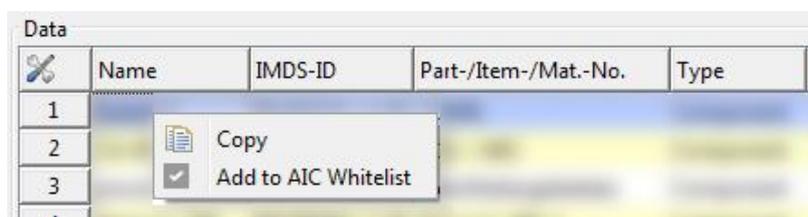


Figure 15 Context menu in the “Received” panel

This option is enabled only in case that the selected MDS has recipient status either “**rejected**” or “**modified**”.

Upon click on the “**Add to AIC Whitelist**” option, the panel for creation of the AIC whitelist entry with populated “**IMDS Id**” field is opened. For more details about creation of the AIC whitelist entry, see **chapter 7.2.3.1.3.1**.

PLEASE NOTE: Only user with activated permission “**AIC_WHITELIST_VIEW_EDIT**” can create new AIC whitelist entry.

7.2.2 Received MDS

By selecting a parent node of the received MDS and click on the right mouse button, the context menu is opened.

Following action is added:

- **Add to AIC Whitelist**
Allows to add opened MDS to the AIC whitelist.

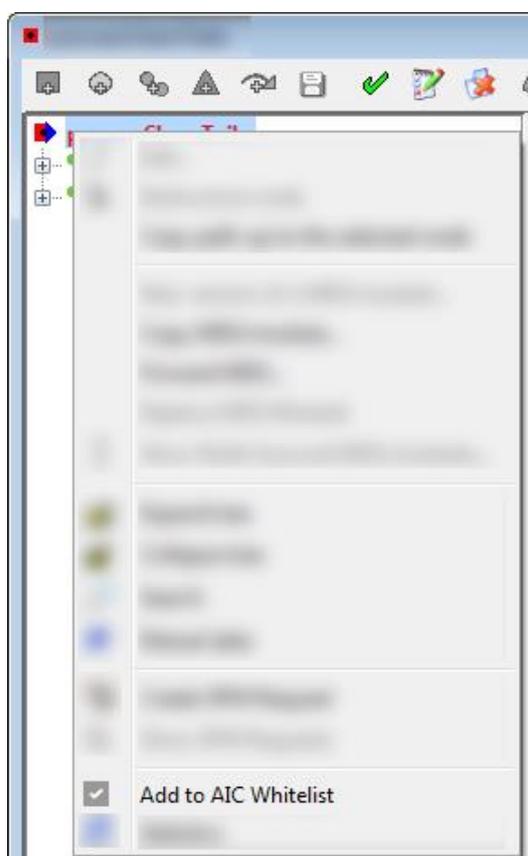


Figure 16 Context menu in the received MDS

This option is enabled only in case that the opened MDS has recipient status either “**rejected**” or “**modified**”.

Upon click on the “**Add to AIC Whitelist**” option, the panel for creation of the AIC whitelist entry with populated “**IMDS Id**” field is opened. For more details about creation of the AIC whitelist entry, see **chapter 7.2.3.1.3.1**.

PLEASE NOTE: Only user with activated permission “**AIC_WHITELIST_VIEW_EDIT**” can create new AIC whitelist entry.

7.2.3 AIC Whitelist Master Data

This master data panel allows to define and maintain AIC whitelist tasks used for the exclusion of the received datasheets from automatic rejection done upon the AIC check.

It can be accessed from the menu “**Extras → Master Data → Manage AIC Whitelist Tasks...**”.

The AIC Whitelist master data panel consists of:

- Open tasks tab (see **chapter 7.2.3.1**)
- History tab (see **chapter 7.2.3.2**)

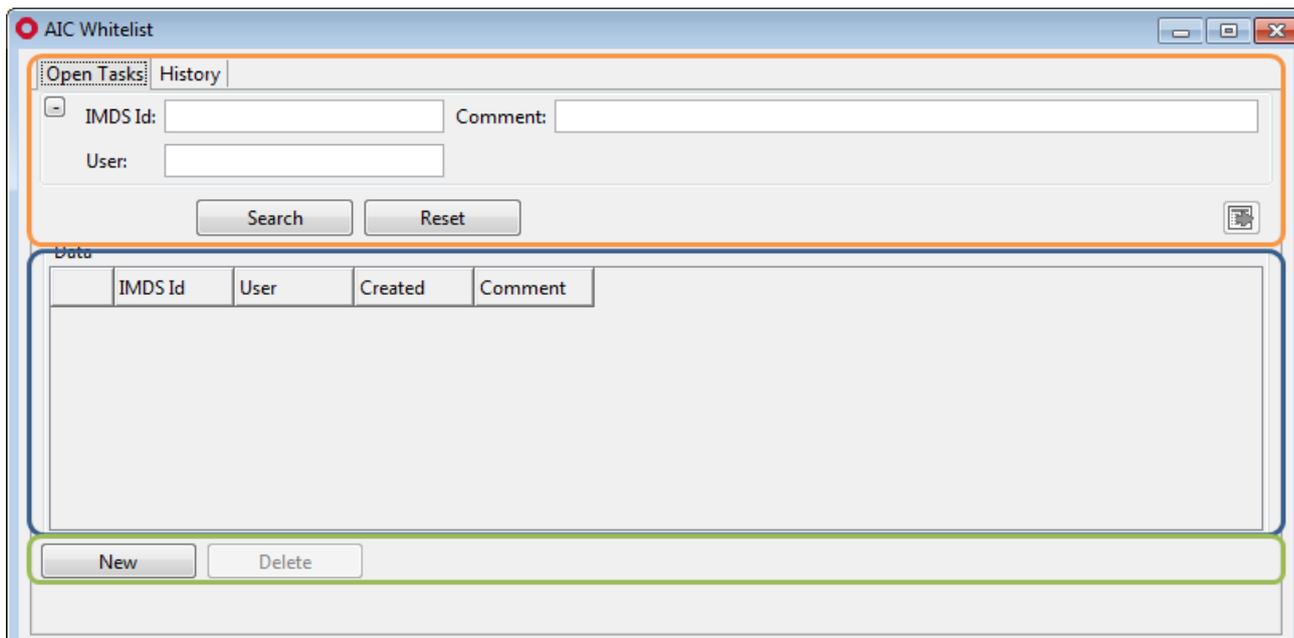
PLEASE NOTE: Only user with activated permission “**AIC_WHITELIST_VIEW_EDIT**” or permission “**AIC_WHITELIST_VIEW**” can access AIC Whitelist master data panel.

7.2.3.1 Open tasks tab

This tab allows to create new AIC whitelist entry or to search for open AIC whitelist entries and delete them.

This panel is split into three areas:

1. Search mask (orange) - see **chapter 7.2.3.1.1**
2. Result list (blue) - see **chapter 7.2.3.1.2**
3. Actions (green) - see **chapter 7.2.3.1.3**



The screenshot shows a software window titled "AIC Whitelist". It has two tabs: "Open Tasks" (selected) and "History". The "Open Tasks" tab is highlighted with an orange border and contains a search mask with input fields for "IMDS Id:", "User:", and "Comment:". Below these fields are "Search" and "Reset" buttons. The "Data" section, highlighted with a blue border, contains a table with the following columns: "IMDS Id", "User", "Created", and "Comment". The table is currently empty. At the bottom, an actions bar highlighted with a green border contains "New" and "Delete" buttons.

Figure 17 Tab “Open Tasks” in the AIC Whitelist panel

7.2.3.1.1 Search mask

Enables to search for AIC whitelist tasks based on defined search criteria.

The following search criteria are available:

- **IMDS Id**
ID of the MDS for which the AIC Whitelist entry exists.
- **User**
Full name of the iPCA user who created the AIC Whitelist entry.
- **Comment**
Comment defined for the AIC Whitelist entry.

The following actions are available:

- **Search**
Perform searches based on criteria entered into the search fields
- **Reset**
Remove entered search criteria from search fields

7.2.3.1.2 Result list

The result list displays AIC Whitelist entries as per defined search criteria. Each row represents one AIC Whitelist entry.

The following standard columns are available:

- **IMDS Id**
ID of the MDS for which the AIC Whitelist entry exists.
- **User**
Full name of the iPCA user who created the AIC Whitelist entry.
- **Created**
The date and time of when the AIC Whitelist entry was created.
- **Comment**
Comment defined for the AIC Whitelist entry.

7.2.3.1.3 Actions

The following actions are available:

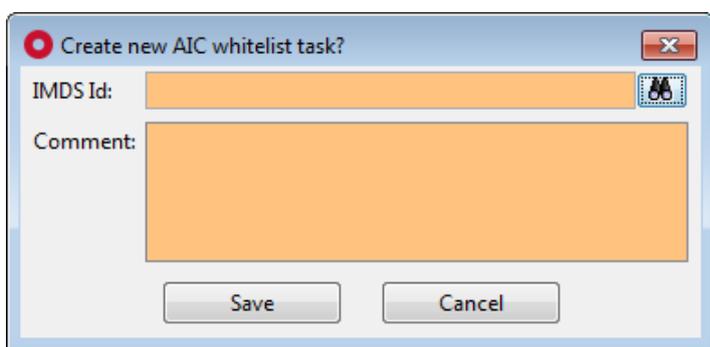
- **New**
Allows to create a new AIC Whitelist entry (see **chapter 7.2.3.1.3.1**).

- **Delete**

Allows to delete an existing AIC Whitelist entry (see **chapter 7.2.3.1.3.2**).

7.2.3.1.3.1 New

The new AIC Whitelist entry can be created manually by click on the “**New**” button. This loads an empty AIC Whitelist creation dialog (see **Figure 18**).



The dialog box is titled "Create new AIC whitelist task?". It contains two input fields: "IMDS Id:" with a text box and a selection icon (two people), and "Comment:" with a larger text area. At the bottom, there are "Save" and "Cancel" buttons.

Figure 18 Dialog for creation of an AIC Whitelist entry

Following information must be defined:

- **IMDS Id**

ID of the MDS of the AIC Whitelist entry.

The value can be chosen using  button which will load special received search window allowing to search for only MDSs with recipient status “**rejected**” and/or “**modified**”. Wished MDS can be then confirmed by click on the “**Apply**” button.

- **Comment**

The comment for an AIC Whitelist entry.

Once all details are defined, the AIC Whitelist entry can be created using “**Create**” button. To cancel creation of the AIC Whitelist entry, the “**Cancel**” button is used.

In case that for selected MDS the open AIC Whitelist entry exists, the error message is displayed to the user (see **Figure 19**) and new entry is not created.

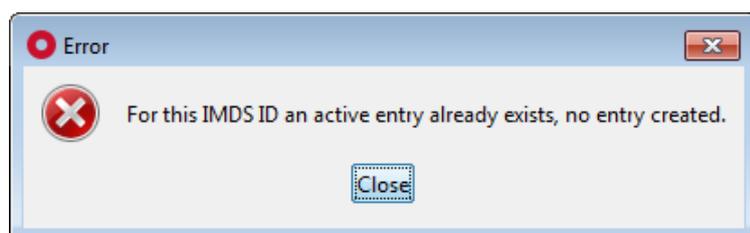


Figure 19 Error message informing user that an open AIC Whitelist entry exists for selected IMDS ID

In case that the not all mandatory fields are populated an error message is shown (see **Figure 20**).

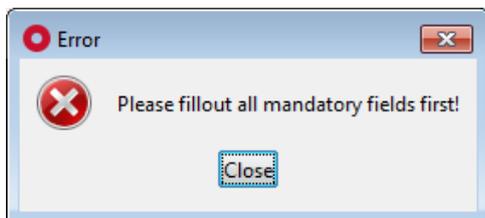


Figure 20 Error message shown on save of AIC Whitelist entry if not all mandatory details are defined

PLEASE NOTE: Only user with activated permission “**AIC_WHITELIST_VIEW_EDIT**” can create new AIC whitelist entry.

7.2.3.1.3.2 Delete

Selected AIC Whitelist entry can be deleted by click on the “**Delete**” button. This will bring up a small pop-up window (see **Figure 21**). By click on the “**Yes**” button an AIC Whitelist entry will be removed from the “**Open tasks**” tab and moved to the “**History**” tab with status “**Deleted**”. By click on the “**No**” button, the AIC Whitelist entry will be kept as open task.

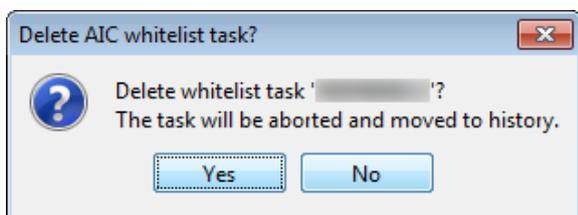


Figure 21 Dialog for deletion of an AIC Whitelist entry

PLEASE NOTE: Only user with activated permission “**AIC_WHITELIST_VIEW_EDIT**” can delete existing AIC whitelist entry.

7.2.3.2 History tab

This tab allows to see all processed or deleted AIC Whitelist entries.

This panel is split into three areas:

1. Search mask (orange) - see **chapter 7.2.3.2.1**
2. Result list (blue) - see **chapter 7.2.3.2.2**
3. Actions (green) - see **chapter 7.2.3.2.3**

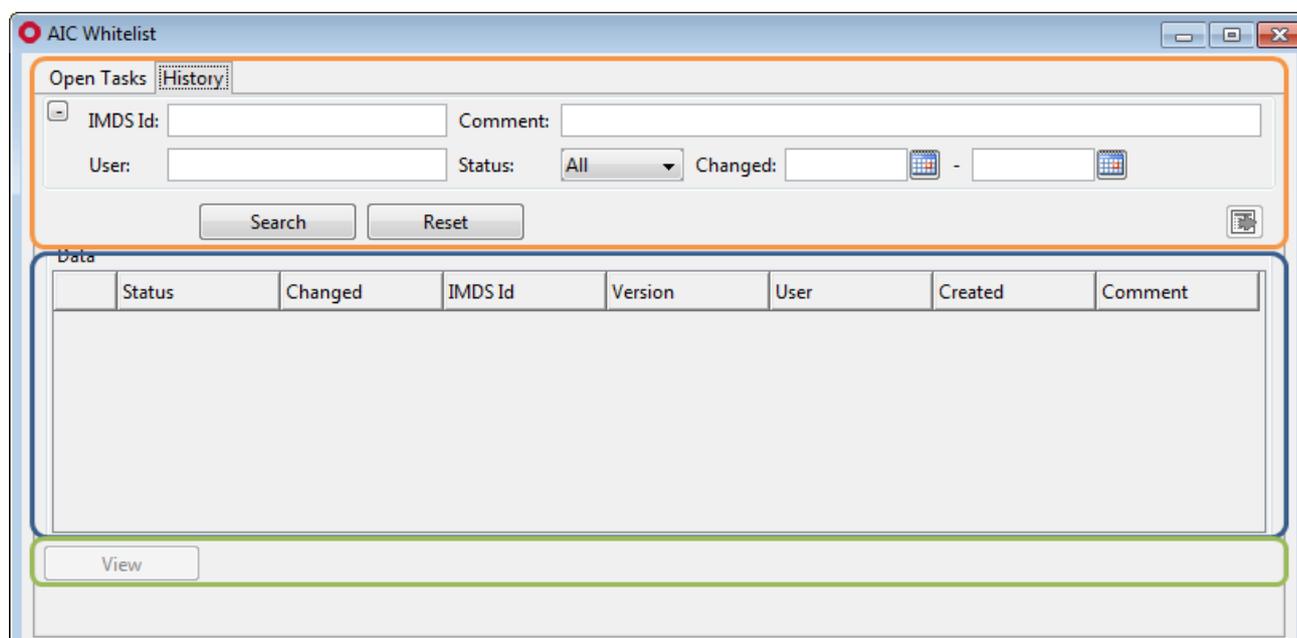


Figure 22 Tab “History” in the AIC Whitelist panel

7.2.3.2.1 Search mask

Enables to search for AIC whitelist tasks based on defined search criteria.

The following search criteria are available:

- **IMDS Id**
ID of the MDS for which the AIC Whitelist entry exists.
- **User**
Full name of the iPCA user who created the AIC Whitelist entry.
- **Comment**
Comment defined for the AIC Whitelist entry.
- **Status**
Status of the AIC Whitelist entry.
 - All
 - Deleted
 - Processed
- **Changed**
Period of time in which the AIC Whitelist entry was changed.
This can be defined either manually in the text field or by using  button and selecting the date from the calendar shown.

The following actions are available:

- **Search**
Perform searches based on criteria entered into the search fields
- **Reset**
Remove entered search criteria from search fields

7.2.3.2.2 Result list

The result list displays AIC Whitelist entries as per defined search criteria. Each row represents one AIC Whitelist entry.

The following standard columns are available:

- **Status**
Status of the AIC Whitelist entry.
- **IMDS Id**
ID of the MDS for which the AIC Whitelist entry exists.
- **IMDS Id**
Version of the ID of the MDS for which the AIC Whitelist entry exists.
- **User**
Full name of the iPCA user who created the AIC Whitelist entry.
- **Created**
The date and time of when the AIC Whitelist entry was created.
- **Comment**
Comment defined for the AIC Whitelist entry.

7.2.3.2.3 Actions

The following actions are available:

- **View**
Allows to view an AIC Whitelist entry (see **chapter 7.2.3.2.3.1**).

7.2.3.2.3.1 View

Selected AIC Whitelist entry can be viewed by click on the “**View**” button. This will bring up the panel for creation of the AIC whitelist entry with populated both fields without any possibility to change the content.

7.3 Check process

7.3.1 Check process and logic

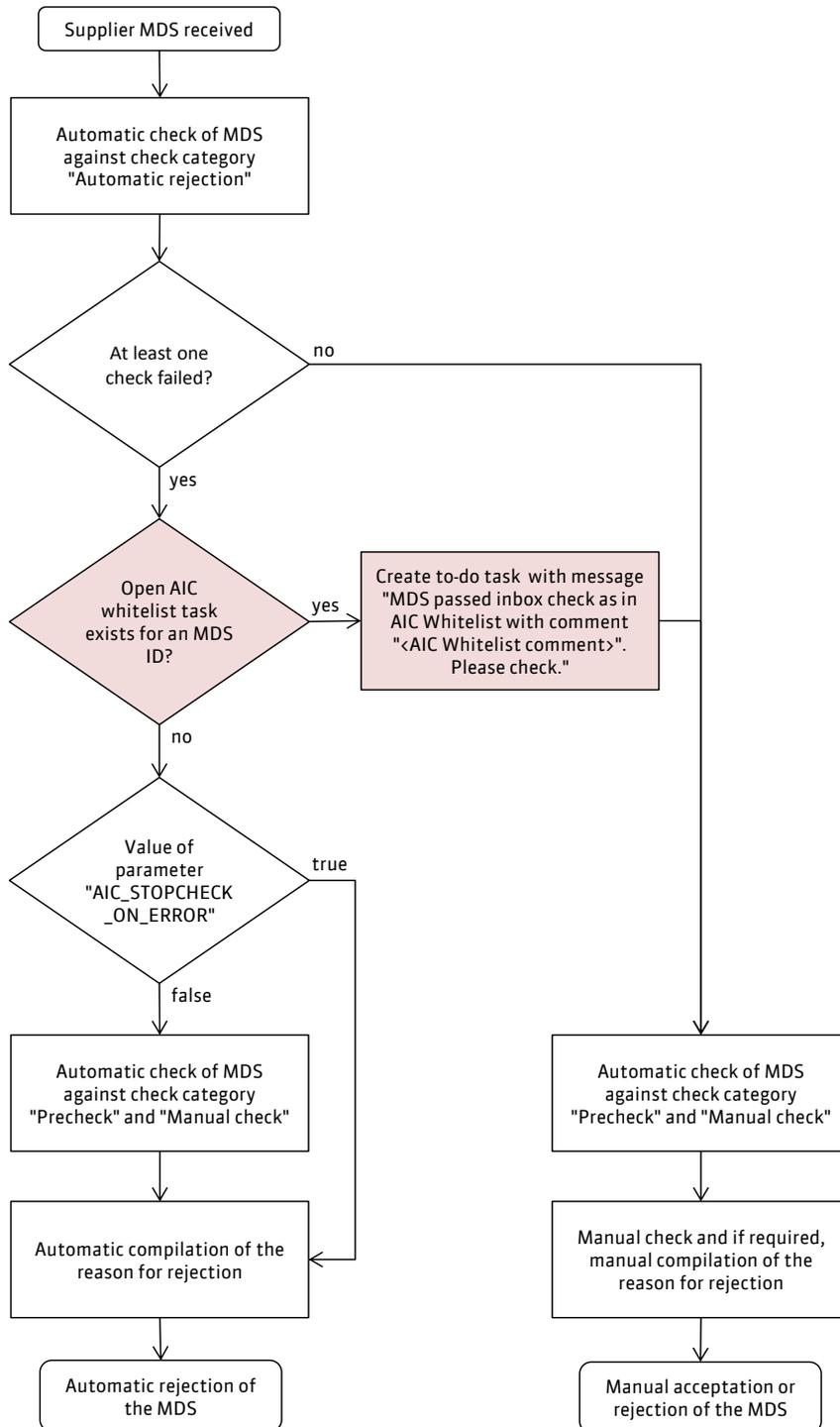


Figure 23 Workflow of check of received MDS with AIC Whitelist module



In case that the AIC Whitelist module is licensed and for the ID of the received MDS an open AIC Whitelist task exists and there is at least one issue found in the MDS during the check of checks assigned to the check category “**Automatic rejection**”, the MDS is not automatically rejected, but a to-do task with message “**MDS passed inbox check as in AIC Whitelist with comment "<AIC Whitelist comment>". Please check.**” and the same text is inserted into the “**IHS-Comment**” field. Afterwards, the AIC Whitelist task is set to “**Processed**”.

7.3.2 Check configuration

The check with name “**AIC Whitelist**” is added to the checkconfiguration called “**SCM/USC Inbox Check**” into the “**General**” tab. The check is assigned to the check category “**Manual check**” and this cannot be changed. The ranking is set to lowest default value and it can be adjusted, if required.

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iPoint

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V11.12.000 onwards

10 Change History

Version	Date	Description
9.10.001	04/09/2013	First release
9.10.001	02/17/2016	Migration of the user manual to new iPoint style Reworked content and structure of the user manual
11.12.000	08/19/2016	Added chapter "AIC Whitelist" for optional AIC module (see chapter 7)