



iPoint

iPCA

IHS

V14.00 onwards

iPCA
IHS

Imprint

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1 Introduction

1.1 General

The application is implemented as a Java application and must be installed locally on the client machine.

The installation is deployed using Java Web Start which runs an update test automatically when starting the application. Therefore, an update of the installation must be done only on the server.

The user interface is on the base of the Online IMDS system, to offer a standardised handling of both systems to the user. However, benefits of the Windows System were added to the iPoint solution, e.g. the architecture of MDI windows (Multiple-Document-Interface), so that several windows can be handled at the same time.

The main difference between this application and the Online IMDS system is that it works with a locally installed database system, so that all data is kept on a local server. Consequently, all data from the online IMDS system that is needed in the local system must be downloaded to the local server before it can be used. On the other hand, the locally created and edited data must be uploaded to the Online IMDS system afterwards. Master data from the Online IMDS system (suppliers, basic substances, norms and material categories) overwrite the In-house data when downloading. Modules and Material Data Sheets that are created and edited locally, overwrite changes that are done in the Online IMDS system meanwhile.

IMDS help files are available for basic concepts and terms, which explain the basic procedures and ideas/concepts. This user manual refers to the iPoint-In-house-System and explains the add-ons.

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

Some functions are only available to users with specific privileges (Roles). If a specific function is not available to you, please contact your in-house system administrator.

1.2 Additional Documentation

Additional documentation (e.g. for the FBoM process or the check routines) is available using the help function (key F1).

Information about the change history is available in chapter 38.

2 Support

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

This administrator will check and answer your enquiry.

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

It is important that only the in-house system administrator contacts iPoint-systems gmbh. This is the only way to get a fast response and to avoid duplication of support tickets.

3 New Functions

Version	Description
14.00	Added below listed features to support IMDS Release 12 (activated only once it is released in IMDS production) - Added new checkbox “Legacy Spare Part” to the “Recipient data” page of the MDS - Added new option “Not yet answered” for a recycle question - Added new colour for display of hidden application code - German material names are eliminated - When creating material, only English material name can be defined - When viewing materials, only English material names are displayed - When viewing loaded material released before IMDS Release 12, also German material name can be displayed - In results from search, only English material names are displayed
13.26	Added feature allowing to visualize existence of open received datasheets for the missing position nodes in the loaded datasheet tree
13.25	Added restriction to editing of IHS-Item-No. field that now requires permissions to be assigned
13.22	Added new notifications in the event management for the LCM and SPM requests Added feature allowing to visualize existence of open SPM requests for the nodes in the loaded datasheet tree Result from usage analysis for application codes done via the iPCA client and via the DB job - Change of order and labels of columns - Addition of new column “Path to Substance” and “Material Weight [g]” Improved PDM BoM Import (iMDS) panel and added support of import of multiple files in one shot
13.14	Improved behaviour and security for the automatic user logout feature (optional)
13.08	Change of order and labels of columns as well as addition of several new columns into the result from usage analysis for basic substances done via the DB job
13.06	Changes based on the GDPR regulation visibility of “Contact person” and “Email Address” columns in “Sent” and “Received” panels is controlled by new permissions
13.05	Implemented job for automatic deletion of few attributes in inactive iPCA user accounts
13.04	Added check that do not allow deletion of an MDS/Module if a new version (/999.xx) exists for the MDS/Module in iPCA (to avoid AI upload error) Added new events in event manager for SEP (optional)
13.03	Added new master data panel “Region Types” (optional)
13.02	Removed support of Compare module for Car Model
13.00	Added feature to change the language of the application without user relogin

Version	Description
	Added feature allowing to remove assigned flexible version from own editable MDS/module Added the dialog shown by default on click on the red cross button in the main application panel Added clearer visualization in the “Supplier data” page of the IMDS MDS if the contact person is deactivated or deleted in IMDS DB Job Manager panel is improved and extended (e.g. job priority can be changed) CSI due date master data panel is improved and extended so that e.g. also dynamically created CSI due dates can be displayed Added check, verifying if the selected method of submission is allowed for selected customer, that runs prior starting MDS bulk transfer (optional) process Added new events in event manager for LCM (IMDS / QA contact(s) assigned) Added possibility to compare received MDSs in any recipient status
12.24	“New version” button and “New version of an MDS/module” option in context menu are controlled by new permissions Improvements and fixes in Company and contact management panel
12.18	Added new feature - bulk deactivation of IMDS datasheets (optional) Added new feature - companies & contacts export (optional)
12.16	Added new feature - priority flags for contacts (optional)
12.11	Added new feature – bulk transfer of IMDS datasheets to the customer (optional)
12.00	Added columns “Weight” and “Unit of measure” to the result list in below search panels: ○ Received ○ Sent ○ Component Added support for obsolete IMDS feature to the Deactivation module Added “Sunset date” and “Last application” date to the details of the basic substance Added possibility to define the name of the usage analysis DB job Support of up to 50 supplier codes in supplier code search criteria in search masks across the application Forwarding of material MDSs is allowed again The “I have declared all GADSL substances” checkbox is removed The “Preliminary MDS” checkbox is displayed for all component/semicomponent/material nodes in the MDS tree “IHS comment” moved from “IHS” tab to “IMDS -> Ingredients” tab Added possibility to replace a simple node with the MDS/module Added possibility to insert standard reason for denial header to the reason for denial field if SCM/USC/AIC check of the received MDS found no issue Added possibility to add a signature to the reason for denial uploaded to IMDS online system on rejection of the received MDS Detailed MDS tree load available only in the direct mode Addition of the search mask into the Project master data panel Extended search criteria in supplier/company search panel Many other changes and improvements

Version	Description
11.00	Disabled “Tolerance” field in the “IMDS -> Ingredients” tab in the MDS/module edit panel The “Deviation” field in the “IMDS -> Ingredients” tab in the MDS/module edit panel is now automatically populated with the maximum allowed deviation as per IMDS R10 rules Extended “Material” search panel with the search criteria “MDS without warnings” Renamed “development sample report” to “preliminary MDS” across the application Disabled radio-buttons for Nissan specific recipient data question “Referenced Wildcard Substances do not refer to GADSL Substances” Added tooltip for “Remark” field for materials Added possibility to have opened more than one search panel Added new event into the event manager allowing to get notification on import of the new CSI rule group Added supplier code to the results from CSI analysis for received MDSs Reworked MDS print output Reworked print from MDS/module analysis Many other changes and improvements
10.00	New feature “Forward MDS” in context menu in opened MDS New additional attributes tabs for OEMs for IMDS Release 9 New checkbox “All GADSL substances are declared” for a material
9.04	Optional extensions: ○ for the usage decision ○ Acceptance/rejection of multiple MDS ○ Starting of predefined DB jobs New permissions for copying and forwarding of MDS/modules Minor improvements Optional parameter settings „User Deactivation” – see chapter 6.4
9.03	New options for tree loading, see chapter 17.2
9.00	New module “Multi Number Support (MNS)” (optional), see chapter 28 “Multi Number Support (optional)” New function for forwarding of received MDS MDS list of the last opened MDS Search Sent/Received MDS: ○ Layout improved ○ added search for DSR Editing basic substance groups: enable copy of basic substance groups, enable carry over of basic substances when versioning New checks: ○ USC: Specific weight not indicated in semi components ○ USC-Check: for Rec022-rejection texts: added IMDS Id respectively part number ○ USC/Q-Checker: Received MDS with Development Sample ○ Q-Checker: AQ- and CSI Checks configurable

Version	Description
	During Export of result lists of the standard search screens additional information will be exported Standard search screens extended by separated state for own and foreign MDS Therefore, possibility in Usage Decision - step 3 to search for not accepted MDS Possibility of replacing missing positions out of the tree Search in Analysis extended by search for car models and new columns in analysis result list Sorting of the search results within the standard search dialogs with priority for the pseudo companies, configurable by a configuration parameter - please refer to the user manual Copy of the path to the clipboard added to the context menu of the tree Date/Time fields can be displayed according to the ISO 8601 formatting rules Daily Download (on demand): download of the new file type CBS (cancelled by sender); contains cancelled and modified MDS Automatic synchronisation of new applications for the USC check Optional parameter settings – see chapter 6.4 Recently Opened feature – see chapter 6.1
8.15	Optional master data “Regions and Organisations” – see chapter 23.5
8.11	Optional extension “Blacklist” – see chapter 9.3.2, 25.2 and 27
8.06	Manually creating of a car model – see chapter 9.3.1 and chapter 25. Added information about RRR and LCA – see chapter 9.3.1 and chapter 34.
8.05	Optional extension multisourced MDS/modules – see chapter 5.5.6 and chapter 9.3.2.
8.02	Changes in Car / Product Model for ISO classifications and DSR MDS (optional) – see chapter 25
8.00	Changes for Rel.8, among others - Cancel standard searches (optional) – see chapter 7.1 - New, improved standard colour scheme – see chapter 0 - New application parameter – see chapter 33.3 - Updated personalization – see chapter 32.1 - Replace nodes in the structure tree – see chapter 8.3.2 - Job cancelling – see chapter 21

4 Basic terms

4.1 Structure tree

Ingredients and structure tree

A material data sheet should contain all the ingredients of a product that can be found in a saleable product. To ensure an explicit display of the structure, the system uses a structured tree view, called the “product structure tree”. A product can consist of one or many subsidiary objects. Each subsidiary object can contain subsidiary object. In this case a multilevel, hierarchical structure tree is created, in which all sub products are listed. This structure tree displays all the components and subcomponents that make up a complex product structure.

Node

A node is a data/place holder in the structure tree.

A product can contain many nodes.

For more information on the “Structure Tree” creation, please refer to the recommendations on the IMDS online website

4.2 IMDS-ID and IMDS-Version inside the Online IMDS system

Every Material Data Sheet / Module is identified by a combination of identifiers. A Node-ID an IMDS-ID and a version number, making it unique reference (e.g.12345, 12345 / 1.00)

When creating a new Material Data Sheet / Module the Node-ID and IMDS-ID will be the same, and the version will be 0.01. (e.g. 12345, 12345/0.01). If there is no change to the Material Data Sheet / Module, and the Material Data Sheet is then released internally, it receives the next major version, incremental up integer (e.g. 12345, 12345/0.01 → 1.00).

When making a copy of an MDS/module with the same IMDS-ID, a new Node-ID and version will be created: Online IMDS system, adds in increments of 0.01 to the current version. Also, the Online IMDS system changes the “Node-ID”, which will be the next available unique number in the Online IMDS system. When working with the new MDS/module, the previous IMDS-ID is still used with a minor incremental change to the version (e.g. 34567, 12345/1.00 → 1.01) If further copies are made from the original, these will maintain the same IMDS-ID as the original, and receive a further change to the Node-ID and a minor incremental change to the version (e.g. 56789,12345/1.02) Depending on the order you then release the changed MDS/module, will depend on the value of the major version update. The order of release, not creation, will determine the major version number (e.g. 56789,12345/1.02 → 2.00) If the earlier copy is then released it will be (34567, 12345/0.01 → 3.00)

If creating a copy/new version of an MDS/module in your IHS system. This new MDS/module will get the following IMDS-ID and version (12345/999.XX). The version level 999.XX is a temporary state in your IHS system, representing a new version of an existing MDS/module, which has not been sent to the external Online IMDS system. After this new version has been uploaded to the Online IMDS system, it will receive its “final” version, driven by what is currently released in the Online IMDS system (e.g. 12345/2.05).

This versioning process allows documenting the complete lifecycle of an MDS/module.

4.3 Statuses in the In-house System and in the Online IMDS system

Because of the ability to locally edit data and local data management, it is necessary to manage more statuses for the In-house system than are available in the Online IMDS system.

IMDS status

This is the edit status of an MDS/module inside the Online IMDS system and is exclusively assigned and changed by IMDS.

- **Edit mode**
The MDS/module can only be changed by a user from the same organisational unit.
The version no. is a minor integer value (e.g. 0.01, 3.02).
- **Internally released**
The MDS/module has been completed, and therefore cannot be changed anymore. If there are more changes that must be done, a new version of the MDS/Module has to be created. The version number will be a major integer value (e.g. 1.00). Only internally released MDS/modules can be used in other MDS that should be sent or published.
- **Published**
This is an MDS status. The MDS is complete, and cannot be edited anymore, and is only published to the public domain. This means that any IMDS user has the right to see this MDS, and to use it in their own MDS/modules. The version no. will be a major integer value (e.g. 1.00).
- **Handshake**
The MDS has been sent to a customer with the status 'edit mode' and has not been accepted or rejected by the customer. With this status, the MDS cannot be edited. If the customer accepts it, this MDS will be automatically released internally. The version no. will be then upgraded to a major integer value (e.g. 1.00). If the MDS is rejected, the MDS status and version number will remain un-changed.

Recipient / sender status

This is the status of an MDS that has been sent to a customer, or that a supplier has received. This status is administered per single recipient.

- **Edit mode**
The MDS has not been sent to a customer yet.
- **Not yet browsed**
The MDS has been sent or received but has not been opened by the recipient yet.
- **Browsed**
The recipient has opened the MDS at least once.
- **Accepted**
The MDS has been accepted.
- **Rejected**
The MDS has been rejected.

- **Modified**
The MDS has previously been rejected, but has been edited in the meantime
- **Cancelled by sender**
The MDS has been deleted by the sender, and cannot be used anymore
- **In process at the recipient**
The MDS has been sent/received, and is in process at the recipient
- **New in IHS**
A recipient was added to an MDS that already has a recipient, and the MDS is not yet sent to this recipient.

Module status

This is an In-house system status, for the in-process situation of an MDS/module inside the In-house system, this can be set or reset by authorised users:

- **In process**
The MDS/module is editable, and can be changed
- **IHS released**
The MDS/module is fully applied without errors. It is now locked, and further processing is no longer possible.

Transmission statuses

This is a temporary status inside the In-house system, this is to control which data records should be transferred to the Online IMDS system, and with what kind of action. The status must be set manually by the user.

- **Empty**
Transmitting status is not set
- **Upload: Transmission status must be set**
To create a new MDS/module, that should not be internally released immediately, or sent to a customer/recipient (e.g. for getting an IMDS-ID for correspondence purposes)
- **Int released: Internal release**
The MDS/module should be internally released (versions no. will get an integer value)
- **Send: Send MDS**
Sending the MDS to a specific recipient
- **Propose: Propose MDS**
To send an MDS to more than one recipient, at the same time the MDS will be released internally.
- **Publish**
To send an MDS to the Online IMDS system for publishing

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Symbol	Meaning
	Unchecked The SCM check is pending
	Checked ERROR A suggestion for the reason of denial was created

Table 1 List of possible SCM states

4.4 Miscellaneous

IMDS System

In this documentation, the Online IMDS system refers to the web application on the Internet, and the data management that comes with it.

IMDS company structure

Every company that works with the Online IMDS system needs to register for an account. It contains at least one organisational unit with a unique organisational-ID.

Additional organisational units can be added to this 'lead company' (e.g. locations, plants) and therefore will receive their own IMDS-organisational-unit-ID for each additional entry.

IMDS users are created by the IMDS client manager and can be allocated to different organisational units and to the 'lead company'.

Contact persons are always valid for the whole company. These must be created and maintained by the IMDS client manager.

These configurations must be done in the IMDS online system and are downloaded into the In-house system via the download functionality.

In the In-house system this organisational structure is displayed as well. Each user of the In-house system is assigned to a specific IMDS-organisational unit.

MDS/modules can be changed by those users who have the same organisational unit ID as the person who created the MDS/module.

MDS/modules can be used by all users and can be integrated into their own MDS/module that belongs to the same company. This means organisational units of a company have access to data of other organisational units of the same company.

Depending on the access rights the user, they can accept/reject all external MDS's that have been sent to any organisational unit they are assigned to in the company.

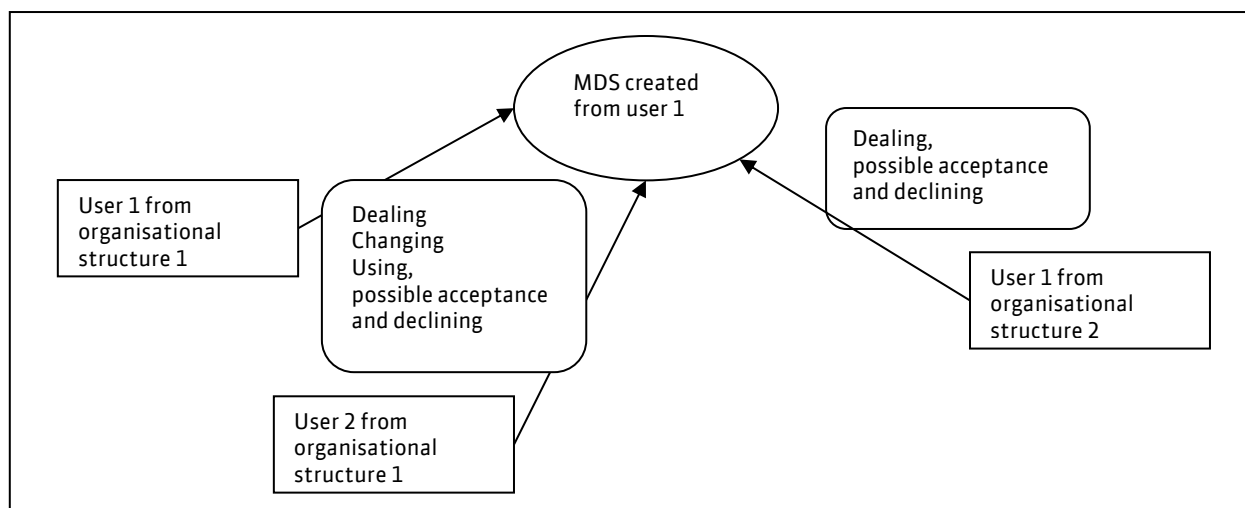


Figure 2 Editing within Organization Units

External_MDS

An external MDS is an MDS that has been created from an organisational unit not belonging to the own “lead company” or its associated organisations. It is a published MDS, or a supplied MDS that has been received and downloaded in to the In-house system.

A supplied MDS can be only used in a BOM if it is accepted.

5 General Information

5.1 Usage

The application iPCA is a Java application that has a user interface like Windows. This involves the usage of the mouse and the keyboard as well as working with multiple windows and applications.

When changing between the different applications, a dialogue window may open in the background (e.g. creating a new MDS/Module or a special dialogue for inserting an MDS/module, etc.) If this happens, please use the Windows taskbar to switch to the In-house application, by bringing the dialogue window to the front.

On click on the “X” button in the main application panel the dialog is shown by default asking if the application should be really closed. If the user unchecks the “**Always display this dialog**” checkbox and clicks on the “Yes” button, this panel will not be shown anymore. To display the dialog again, the company iPCA administrator needs to delete the configuration parameter “**DISPLAY_DIALOG_ON_IPCA_CLOSURE**” for wished user.

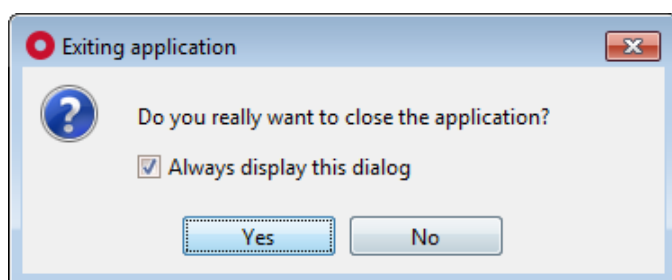


Figure 3 Panel shown on click on the “X” button in the application

5.2 Drag & Drop

Structure trees can also be modified by using drag & drop function.

The following actions are available:

- **Moving a node in the tree**
Select a node using the left mouse button. Holding down the button, drag the node to the new designated position and release.
If the new position is permitted (e.g. parent node has the status editable), the new node will be inserted in the designated position.
- **Inserting from other structure trees**
You can also move an MDS/module (not simple nodes) from another structure tree. To do this, keep the “ctrl” key held down before selecting with the left mouse button, then moving the node to the new position.
- **Inserting from the search panel**
You can also select an MDS/module from the search panel to be inserted in your structure tree. To do this, select the MDS/module from the standard search panel, using the left mouse button,

held down, drag it to the structure tree position, and release. If it is a valid position, the MDS/module will be inserted.

From the special search panel, that opens when selecting “add” from the menu ( ,  ,  , ), **no** drag & drop is possible.

The drag & drop function is supported by a special highlighting:

- If a node can be dropped between two nodes, a blue line will be visible between the nodes.
- If trying to move a node below another one, the node you want to drop below must be highlighted by a blue rectangle.
- If you are not allowed to drop a node at the designated position, the colour of the line or rectangle will switch from blue to red.

Whenever changing the structure tree using drag & drop, the position numbers will be recalculated automatically.

5.3 Cut, Copy & Paste

All labels and values can be “Copied” and “Pasted” using the options available within application or keyboard controls.

The application windows are split into two areas. The upper area (Red box) is for user defined inputs.

The lower area (Blue box) is used for the displayed results.

Slightly different options are possible, depending on which area you are taking data from.

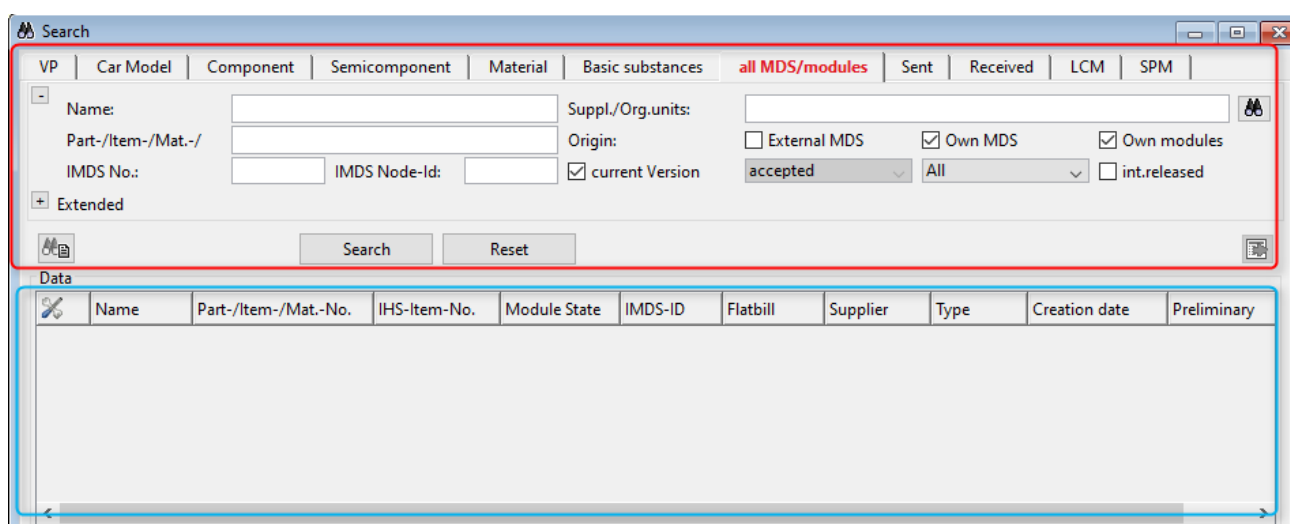


Figure 4 General screen layout

To copy information to the clipboard from the results area, using the right mouse button, select the field from the table you want to copy, with the left mouse button, select copy from the menu

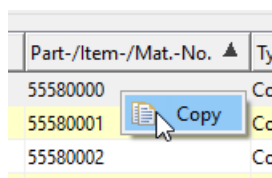


Figure 5 Copy using the right mouse button.

To copy information to the clipboard from the input area,

Using the left mouse button, select, and drag the cursor through the information you want to copy, with the right mouse button, select copy from the menu. Keyboard shortcuts <ctrl> c can also be used.

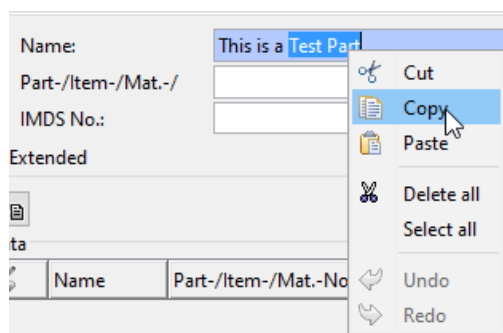


Figure 6 Copying text

To paste information from the clipboard into an editable field, use the right mouse button, and then select the option paste from the menu. Keyboard shortcuts <ctrl> v can also be used.

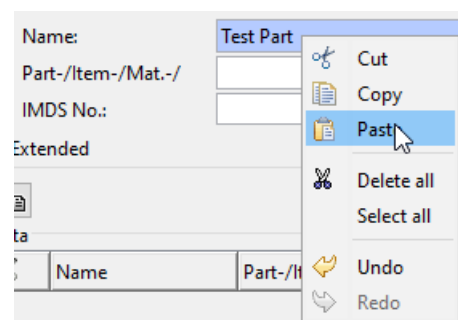


Figure 7 Copying from tables

5.4 Navigation between the editing windows

When you are working with the application, performing various tasks, new window will open, represented on the task bar. To be able to navigate (switch windows) there are various options available

- Select the window you want from the task bar, above the status line at the bottom of the screen (red boxed area) Using menu → Window → <select window>, the shortcut key sequence shown in the menu can also be used.

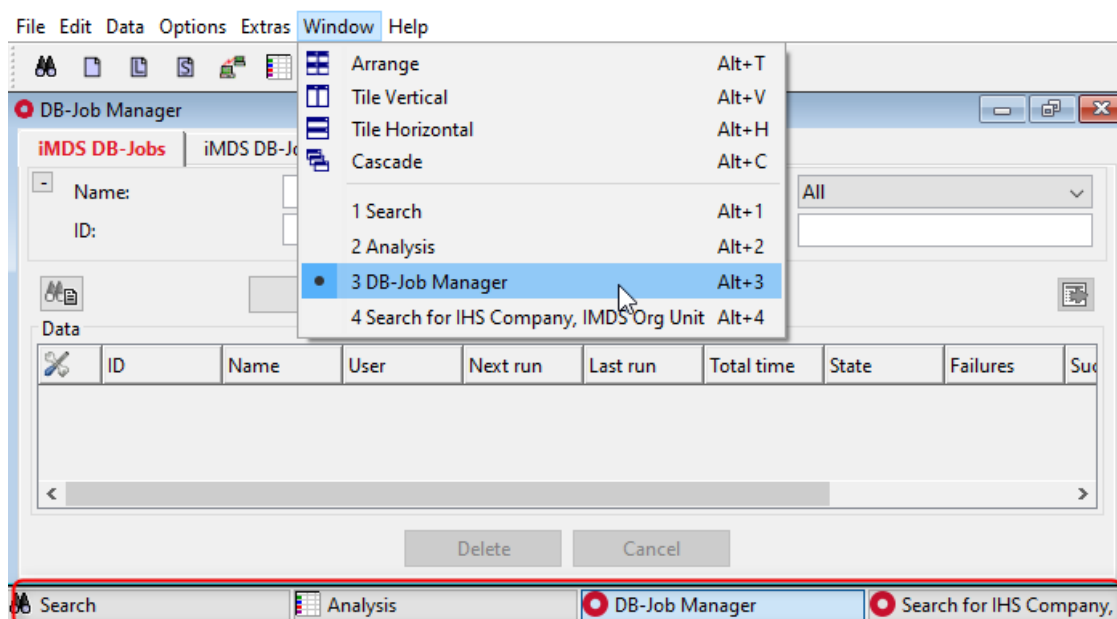


Figure 8 Working with windows

Clicking the respective tab will move the window to the front.

5.5 Highlighting

In the detailed view of an MDS/module, some attributes will be highlighted for easier recognition.

5.5.1 Basic Substances

- **Font colour orange for basic substances** ▲ copper (0 - 0.3 %)
The substance must be declared due to the GADSL list.
- **Font colour red for basic substances** ▲ Asbestos (0 %)
The substance is prohibited (forbidden) due to the GADSL list.
- **Font colour pink for basic substances** ▲ lead (0 %)
The substance must be declared and is prohibited (forbidden) due to the GADSL list.

- **Background colour grey**  zinc (30 %)
The substance is labelled as erased (deactivated) in IMDS.
- **Underlined text for basic substances**  Cadmium (0.01 %)
The basic substance is a REACH-SVHC (Substance of Very High Concern)

5.5.2 Missing Positions

Definition:

A missing position is a simple node that acts as a placeholder in the tree structure, this is for MDS/modules not yet created or received.

A missing position will be created in the tree structure if;

During the PDM BoM import of a BoM (CSV, PDM/ERP/SAP interface) the MDS/module has not been found for a given part/item/material no. a missing position is therefore documenting a missing MDS/module, it will always be shown as a component when created automatically.

- **Font colour red for simple component nodes**

-  **NONEXISTENT: DISPLAY**

It represents a component, semi component/material that has not been found during the import process.

Attention: If the option “IPCA/SPM” is licensed, not only the creation of missing positions will be created automatically, but also a raw entry of a supplier request will also be created.

- **Font colour red with yellow background for simple component nodes**

-  **NICHT VORHANDEN: UNGELESSEN-TEIL**

It represents a component, semi component/material that has been found during the import process, but a matching MDS/module carried the status “rejected”, “not yet browsed” or “browsed” (optional).

A missing position can be created manually for components and semi components. To create a missing position, select the top-level node and then select the option “ Add component/ Add semi component” from the menu icons.

In both cases a dialogue box opens, allowing you to select your required option. For this example, “Missing position” is selected and a simple note will be created that can now be edited.

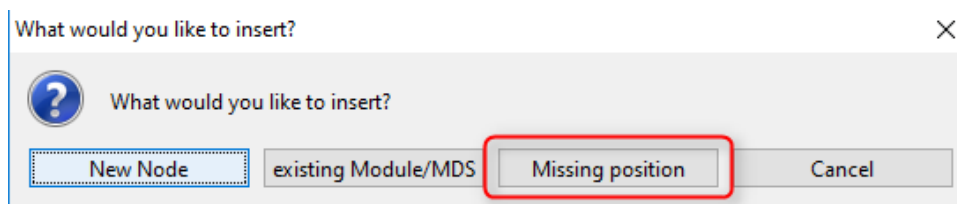


Figure 9 Create a missing position – manually

5.5.3 Old Versions

A component/semi component or material containing a blue arrow with the icon (, , ) indicates, that there is a later version available for this MDS/module.

5.5.4 MDS/modules that are not allowed to use

These are displayed with the background colour grey  zinc (30 %) ,  035 BHK (Synonym: 035 BHF, 035 BHO, 240 E
This indicates the substance or MDS/module has been marked as deleted in Online IMDS system, or it is a received MDS that was cancelled by the sender.
Further information regarding icons and there descriptions are available in chapter 9.2 “Status symbols”.

5.5.5 MDS' of Pseudo companies

If a symbol has a black border (e.g. , , ) then the node is a published MDS, and was created by one of the (currently 4) IMDS pseudo companies

- IMDS-Committee [423]
- IMDS-Committee / ILI Metals [18986]
- Stahl und Eisen Liste [313]
- ZVEI-Rec019 [102677]

5.5.6 Multisourced MDS/modules

There can be lots of part-/item-/material numbers with multiple MDS/modules from different suppliers or with different IMDS ID's. These MDS/modules will be displayed as (, , ).
Deleted, hidden or deactivated MDS/modules are not considered.

5.6 Tree Load Filter

If the tree load filter is set, and a referenced MDS is not loaded because of the filter settings, the name of the node is shown in italic with a yellow background.  CrAl 25 5; X8CrAl25-5 (12 g)

5.7 Optimise search screens

To be able to optimise the visible search results, the upper inputs area can be either expanded to allow additional criteria or collapsed to allow more data to be visible. This is done using the button (-) to collapse or (+) to expand. This option is available in all search screens.

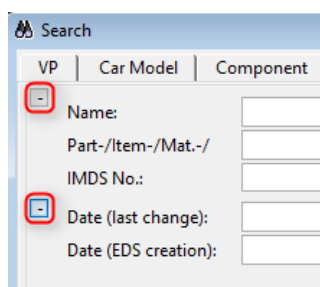


Figure 10 Expand user inputs

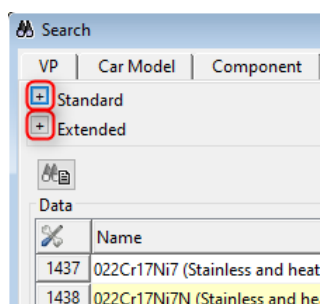
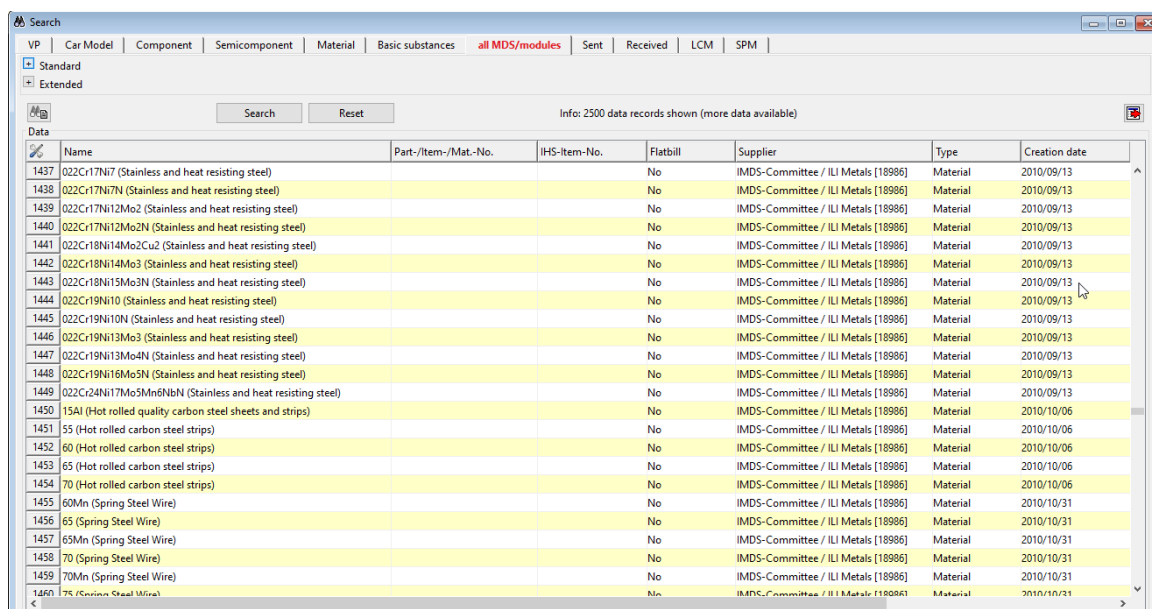


Figure 11 Collapse user inputs



Name	Part-/Item-/Mat.-No.	IHS-Item-No.	Flatbill	Supplier	Type	Creation date
1437 022Cr17Ni7 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1438 022Cr17Ni7N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1439 022Cr17Ni12Mo2 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1440 022Cr17Ni12Mo2N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1441 022Cr18Ni14Mo2Cu2 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1442 022Cr18Ni14Mo3 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1443 022Cr18Ni15Mo3N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1444 022Cr19Ni10 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1445 022Cr19Ni10N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1446 022Cr19Ni13Mo3 (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1447 022Cr19Ni13Mo4N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1448 022Cr19Ni16Mo5N (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1449 022Cr24Ni17Mo5Mn6NbN (Stainless and heat resisting steel)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/09/13
1450 15Al (Hot rolled quality carbon steel sheets and strips)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/06
1451 55 (Hot rolled carbon steel strips)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/06
1452 60 (Hot rolled carbon steel strips)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/06
1453 65 (Hot rolled carbon steel strips)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/06
1454 70 (Hot rolled carbon steel strips)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/06
1455 60Mn (Spring Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31
1456 65 (Spring Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31
1457 65Mn (Spring Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31
1458 70 (Spring Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31
1459 70Mn (Spring Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31
1460 175 (Carbon Steel Wire)			No	IMDS-Committee / I/I Metals [18986]	Material	2010/10/31

Figure 12 Extended results list

6 Main functions

By starting the application, the main functions will be available in the menu or as an icon.

Most of the menu functions are also available by using the icons below the menu bar.

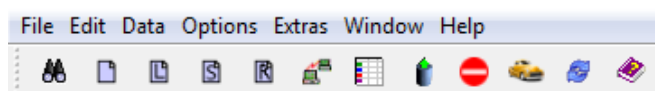


Figure 13 Main Functions

Please note, not all the functions listed are available to all companies. The functions identified as “Optional” are licenced extensions. For more information on these additional features, please see your company specific user manual.

6.1 File

The following functions are available:

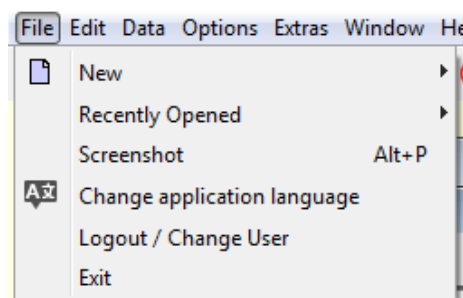


Figure 14 File menu options

- **New**
 - Create MDS/module
 - Create LCM request
 - Create SPM request
 - Create SEP request
- **Recently Opened**
List of recently opened MDS/modules, to re-open them quicker.
- **Screenshot**
Allows to saved current look of the application as a screenshot or to directly print it.
- **Change application language**
Allows to change language of the application without logout from the application.
PLEASE NOTE: On change of the language, all opened windows will be closed.

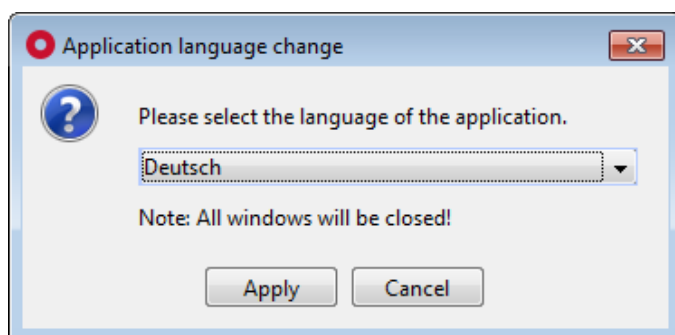


Figure 15 Panel for application language change

- **Logout / Change User**
Allows to log out from the application order to re-log in with another username
- **Exit**
Allows to exit the application.

6.2 Edit

The following functions are available:

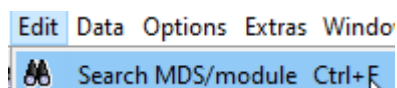


Figure 16 Edit menu options

- **Search MDS/module (🔍)**
Opens a new search window. Please see chapter 7 “Search”
Please note: Having multiple search windows open, will impact your system performance.

6.3 Data

The following functions are available:

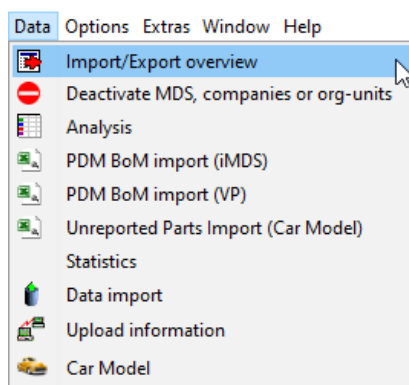


Figure 17 Data menu options

- **Import/Export overview** 
Opens a dialogue window to allow you to check the status of various file imports.
Please see chapter 19 for more information.
- **Deactivate MDS, companies, or org- units** 
Opens a dialogue window to allow you to search for Deactivated MDS/modules or Companies.
Please see chapter 20 for more information.
- **Analysis** 
Opens a dialogue window to allow you to start an analysis.
Please see chapter 14 for more information.
- **PDM BoM import (iMDS) (optional)** 
Opens a dialogue window to allow you to import a .csv file.
Please see chapter 15 for more information.
- **PDM BoM import (VP) (optional)** 
Opens a dialogue window to allow you to import a .csv file.
Please see user manual “VP Module” for more information.
- **Jama/Japia import (optional)**
Opens a dialogue window to allow you to import.
Please see the user manual “Jama/Japia”.
- **Statistics (optional)**
Opens a dialogue window to allow you to search for statistical information.
Please see chapter 17 for more information.
- **Data import (optional)** 
Opens a dialogue window to allow you to search for previously imported parts lists.
Please see chapter 16 for more information.

- **Upload information** 

Opens a dialogue window to allow you to check on the IMDS status of parts
Please see chapter 12 for more information.
- **Car Model (optional)** 

Opens a dialogue window to allow you to search and change information regarding already uploaded car models.
Please see chapter 26 for more information.
- **Supplier Contact Data Import (optional)** 

Opens a dialogue window to allow you to import new contacts to existing IMDS and non-IMDS companies as well as to update existing contacts.
PLEASE NOTE: Based on the GDPR regulation, a checkbox “**I am aware that the data protection regulations of the GDPR must be observed when using this application.**” is displayed and must be checked to be able to proceed with the import. By this, user doing import (which can create & update IHS contacts or update IMDS contacts) confirms that all contacts in the import file agreed to save their personal data in the database.
- **MDS bulk transfer (optional)** 

Opens a dialogue window to allow you to submit datasheets which references to are detailed in the import file to the defined customer.
Please see **chapter 29** for more information.

6.4 Options

Following functions are available:

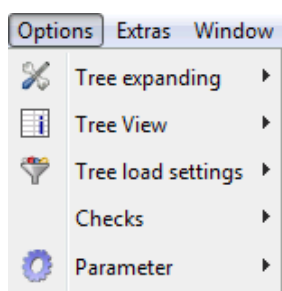


Figure 18 Options menu options

- **Tree expanding**

Allows you to set various options for viewing the tree structure.
Please see chapter 18.1 for more information.
- **Tree view**

Allows to display additional node data in the datasheet tree view.
Please see chapter 18.2 for more information.

- **Tree load settings**

Allows you to set various filters for viewing the tree structure.
Please see chapter 18.3 for more information.

- **Checks**

With this function you can configure the checking parameters

- **Check configurations**

Ability to list and edit all checks for the received MDS checks, Recommendations and Quality checking
Please see the manual for check configurations and check coverage.

- **Checks in use**

List and Edit, which configuration for the quality and recommendation checking are applied

- **Display inline (optional)**

The checking results appear in a separate window or in the editing mask
For more information please see the manual for check configurations and check coverage.

- **Parameter**

Other options may be available depending on your specific company's licenced extensions. For more information, please see the related user manual.

- **VP Parameter (optional)**

Allows you to set various parameters regarding the VP Module.
Please see user manual VP Module for more information.

- **iFlow parameter (optional)**

Used to set the parameters for iPoint iFlow Server for Webservice missions.

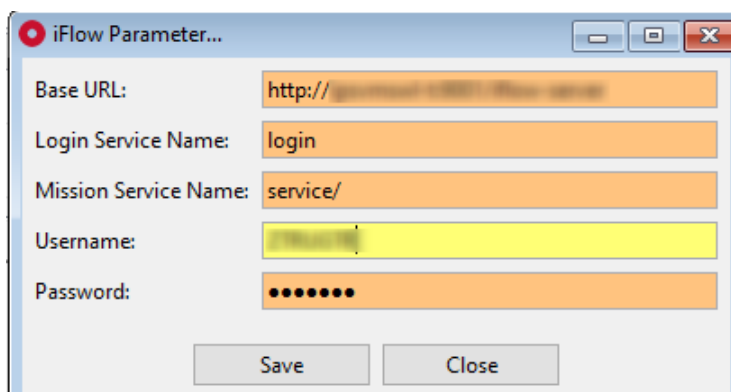


Figure 19 iFlow parameters definition panel

- **Base URL**

Base URL under which the iFlow server is reachable (e.g. http://myserver05:9040)

- **Login Service Name**

Service name for the authentication on the iFlow server

- **Mission Service Name**
Service name to call the web service mission
- **Username**
Username for authentication on the iFlow server
- **Password**
Password for authentication on the iFlow server
- **LCM Lifecycle Management (optional)**
Please see manual for product iPCA/LCM for more information.
- **SPM Supplier Part Management (optional)**
Please see manual for product iPCA/SPM for more information.
- **Prototype parameter**
Please see chapter 2.2.4 for more information.
- **CSI parameter (optional)**
Please see manual for Product PCC
- **Welcome message**
Allows you to create a message that is visible to all users. This will appear after the user has logged in.
Only for the user with “CONFIG COMPANY” Admin privilege rights, a dialogue window will appear for editing. In the upper field a draft text can be added/edited, that can be saved. This will not be visible to users until it is activated as a welcome text. The visible active welcome message will appear in the lower field.
The following actions are available after editing of the upper field:
 - **To save**
After adding/editing of the draft text in the upper field, the added/edited message can be saved. A confirmation prompt appears, asking if the draft should be activated.
If “yes” the draft will be saved and activated as the default message and will appear in the lower field. Otherwise the text is only saved as a draft in the upper field.
 - **To reset**
If changes are made, but you don’t want to use them. You can use “Reset” and the old message will be set and displayed.
 - **To close**
When you close the dialogue, if the text you added/edited is not saved a confirmation prompt will appear asking you to confirm.
- **Password security (optional)**
These parameters are used to define the password validity and your company wide security criteria for user passwords.

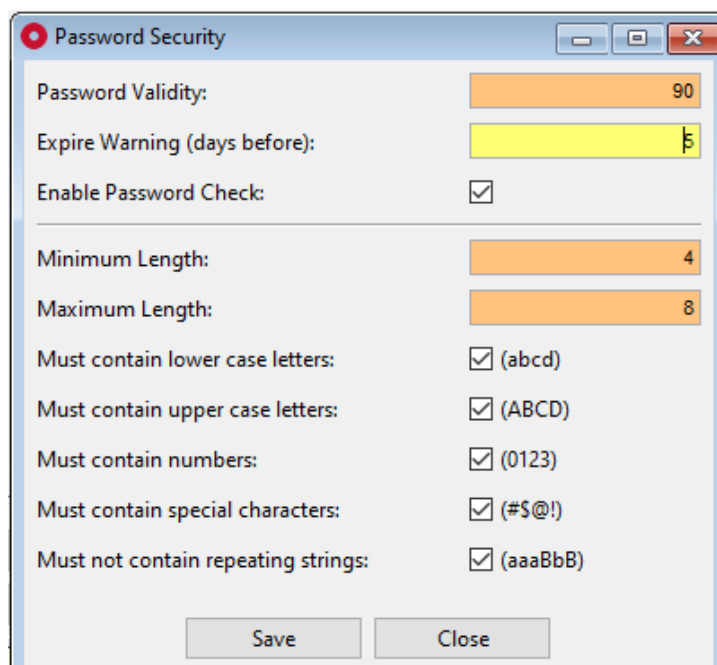


Figure 20 Password Security Parameter

The option “**Enable Password Check**” enables/disables the following password security criteria:

- **Minimum Length**
Defines the minimum length for a password. Value range: 4 to 99
- **Maximum Length**
Defines the maximum length for a password. Value range: -1 to 99; -1 deactivates the criteria
Note: The maximum length cannot be smaller than the minimum length!
- **Must contain lowercase letters**
Defines whether the password must contain at least one lowercase letter. (e.g. abcde)
- **Must contain uppercase letters**
Defines whether the password must contain at least one uppercase letter. (e.g. ABCDE)
- **Must contain numbers**
Defines whether the password must contain at least one number. (e.g. 12345)
- **Must contain special characters**
Defines whether the password must contain at least one special character. (e.g. !.#\$)

- **Must not contain repeating strings**
Defines whether the password may contain repeating characters. (e.g. aaaBbb)
PLEASE NOTE: This criterion is not case sensitive and applies to 3 consecutive characters. Strings like **ababABAB** do not match this criterion.

The “**Password Validity**” defines the number of days after which a new password must be changed. If this parameter is set for the first time, every affected user must change his password on the next system login.

The parameter “**Expire Warning**” defines the period (in days) the user will be informed before their password expires.

Both parameters can be disabled by using a value of “-1” if no set criteria are to be used.

Note: Mandatory fields cannot be left blank

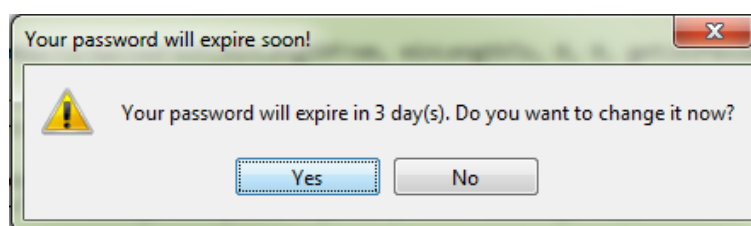


Figure 21 Password expiry warning

The warning message will pop up every time you try to login until the password has been changed. By selecting “yes” the user can change their password directly:

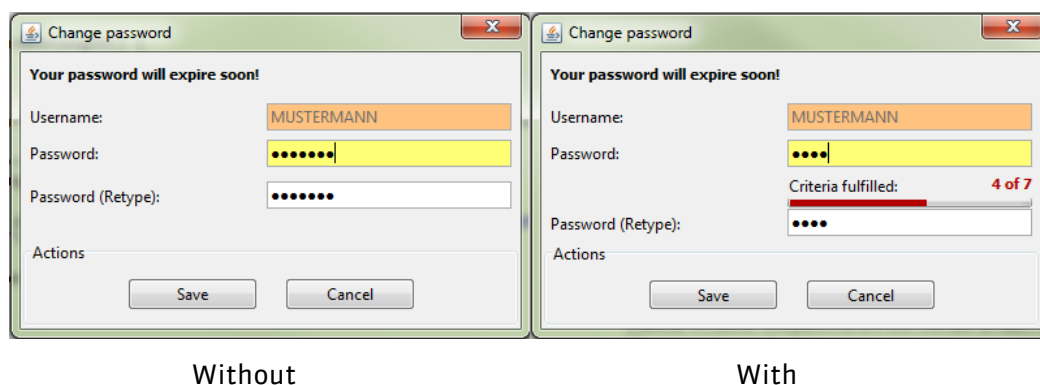


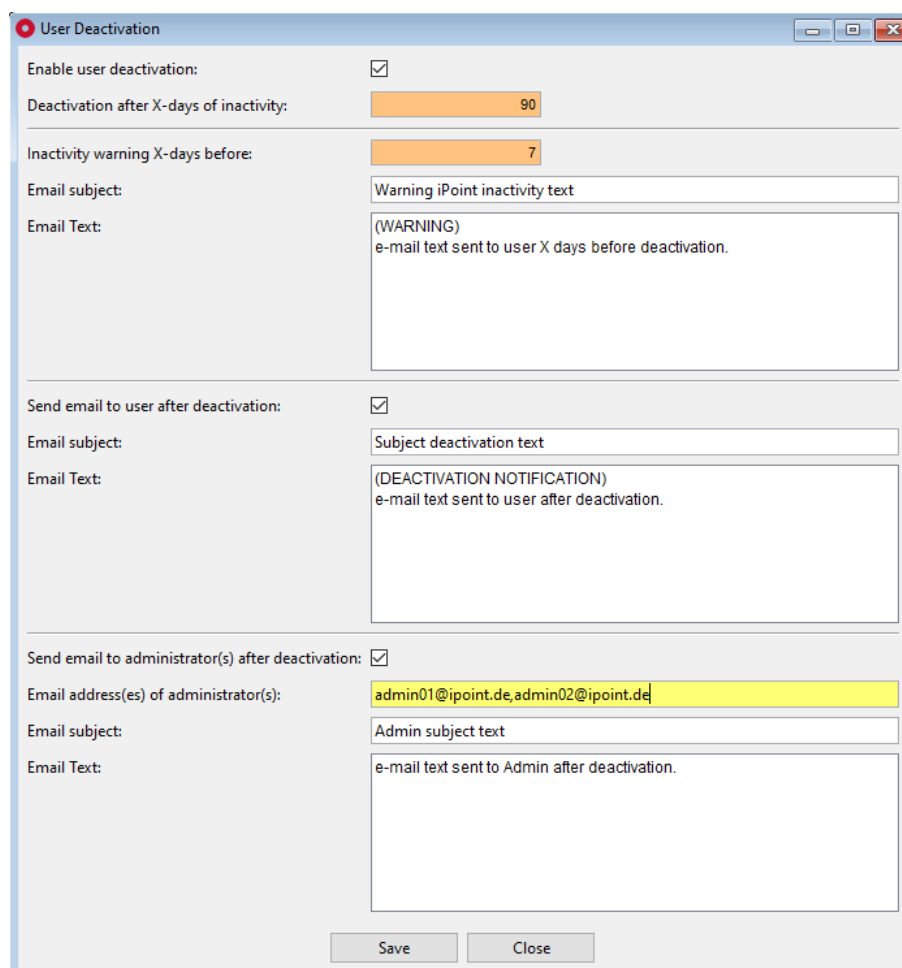
Figure 22 Change expiring password (with/without criteria)

In the example (Without) the password parameter “Enable Password Check” has been deactivated.

In the example (With) example shows a password security level has been set, to activated. The label “4 of 7” means the current password fulfills 4 of the 7 required criteria.

○ **User Deactivation (optional)**

These parameters are used to configure the automatic deactivation of users after a defined number of days of inactivity and send an appropriate notification to the user.



The 'User Deactivation' window contains the following configuration options:

- Enable user deactivation:** ☒
- Deactivation after X-days of inactivity:** 90
- Inactivity warning X-days before:** 7
- Email subject:** Warning iPoint inactivity text
- Email Text:** (WARNING)
e-mail text sent to user X days before deactivation.
- Send email to user after deactivation:** ☒
- Email subject:** Subject deactivation text
- Email Text:** (DEACTIVATION NOTIFICATION)
e-mail text sent to user after deactivation.
- Send email to administrator(s) after deactivation:** ☒
- Email address(es) of administrator(s):** admin01@ipoint.de,admin02@ipoint.de
- Email subject:** Admin subject text
- Email Text:** e-mail text sent to Admin after deactivation.

Buttons: Save, Close

Figure 23 User Deactivation Parameter

With the option **"Enable user deactivation"** activates, a background process that will check the period of inactivity for every user in the system. If a user's inactivity exceeds the defined limit (Parameter "Deactivation after X-days of inactivity") their account will be deactivated (set to inactive).

The following options are available:

- Send e-mail to affected users X-days before deactivation of their account. The Parameter "Inactivity warning X-days before" defines the number of days before this email is sent. A value of "-1" disables this notification.
- Send e-mail to affected users after deactivation of their account.
- Send e-mail to defined recipients (e.g. administrators) if at least one account has been deactivated in the last check cycle. This e-mail text will be extended with details of the deactivated user accounts automatically.

PLEASE NOTE: Based on a regulation EU 2016/679 of the European Parliament, so called General Data Protection Regulation (GDPR), below iPCA user account attributes are deleted upon the profile is inactivated:

- Password
- Email
- Telephone No.
- Department
- Description
- Contact person

6.5 Extras

The following functions are available:

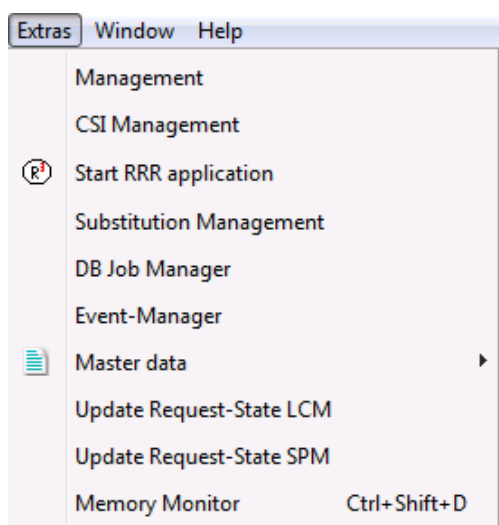


Figure 24 Extras menu options

- **Management**
Please see chapter 33 “Administration”
- **CSI Management**
Please see user manual “CSI”.
- **Start RRR application (optional)**
Please see user manual “RRR”.
- **Substitution Management (optional)**
Please see user manual “Flatbill”.

- **DB Job Manager**
Please see chapter 21 “DB Job Management”
- **Event-Manager (optional)**
If the LCM or SPM or SAM-M modules are licensed, then it is possible to fix different events to the e-mail creation. Please check chapter 24 “Event Management”
- **Master data**
Please see chapter 23 “Master Data (optional)”
- **Update Request-State LCM**
Allows to manually trigger the update of statuses of open LCM requests.
- **Update Request-State SPM**
Allows to manually trigger the update of statuses of open SPM requests.
- **Memory Monitor**
With this function the internal memory consumption can be displayed.

Other options may be available depending on your specific company’s licenced extensions. For more information, please see the related user manual.

6.6 Window

With using this function, you can select how opened screens are arranged in your work space. Or select one to display (bring to front) from the list of opened windows.

6.7 Help Menu

The following functions are available:

- **Help contents** 
A browser will be opened and will provide you with available help documents.
Depending on your browser settings, a new window/tab will be opened, or an existing open browsing window will be replaced with the help contents, this can be avoided by changing the settings of your internet browser.
For Internet Explorer example, this can be changed by going to “Tools → Internet option → Tab” by changing the option “open links in current tab or window” to “open links in new window” or “open links in new tab in current window”
- **Send log file**
If you have encountered a problem with the application, you may be asked to provide the log files. Firstly, you should contact your In-house administrator to raise the issue with iPoint help desk. They will be provided with a tracking number related to the issue. Using this function, you can send the required log files.
Please enter the official iPoint tracking number and short description of the issue in the appropriate fields.

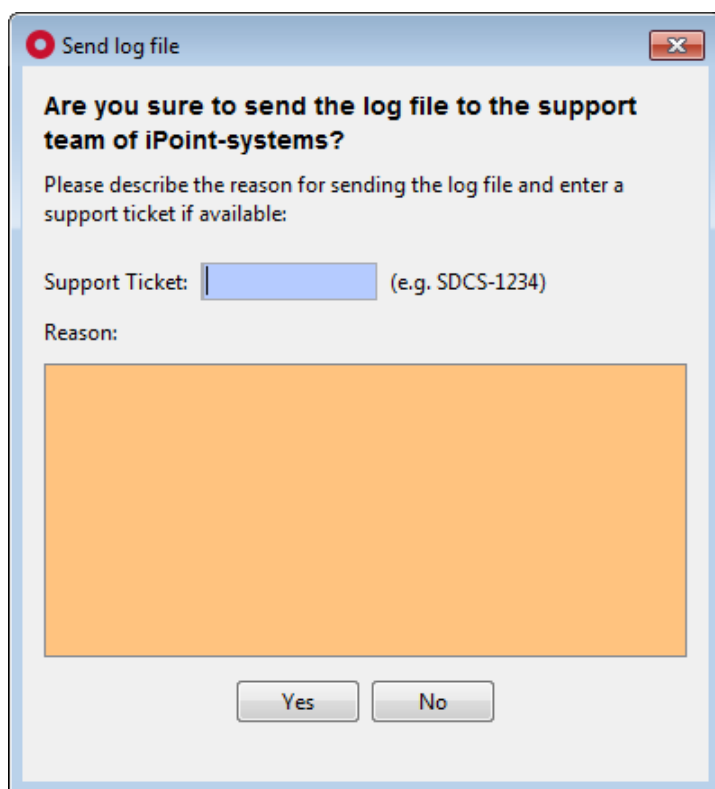


Figure 25 Sending the log file

- **About**

A pop-up window will appear. It contains information regarding the application:

Statistics:

The “Stats” button calculates the statistics of your MDS/Modules in your IHS. This calculation can take some time as it’s searching the database for the status of all MDS/modules.

The pop-up screen can be closed by selecting the button “**OK**”.

7 Search

7.1 General

The options shown may or may not be available to you depending on your specific company's licenced extensions, and your specific user role. For more information, please see the related user manual.

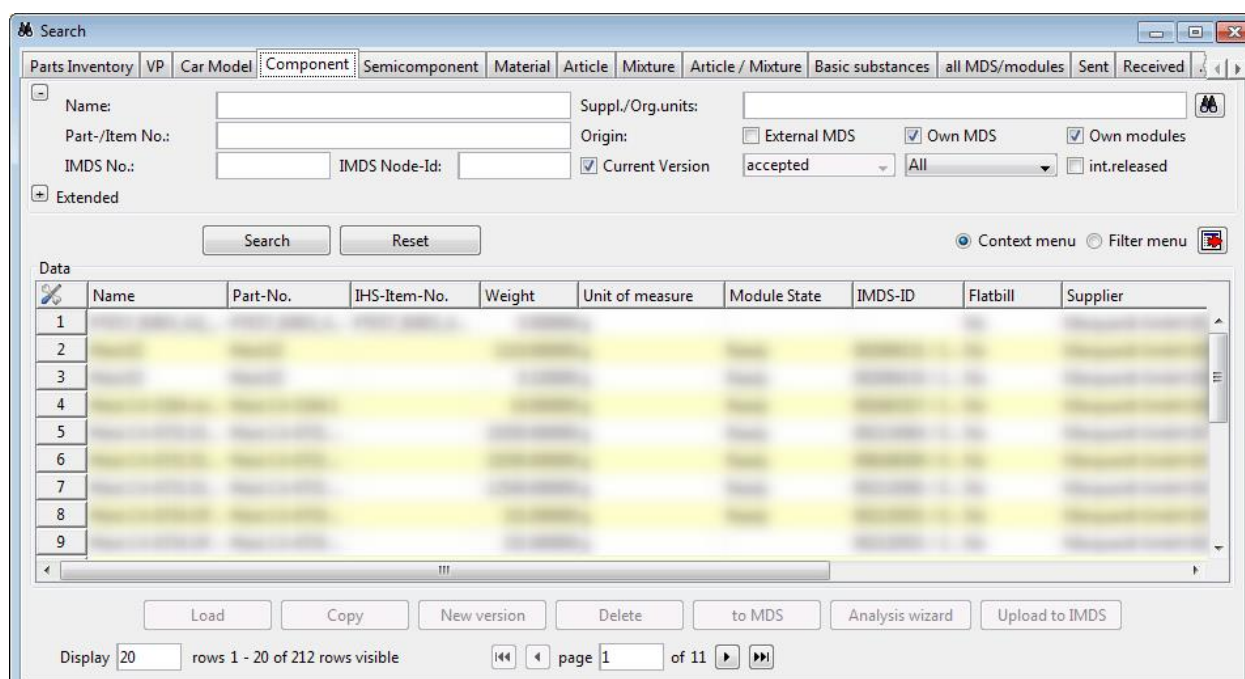


Figure 26 Default search

The search mask is structured as follows:

- Module type
- Search criteria
- List of search results

Running searches (within the standard searches) can be cancelled (optional) by selecting “Cancel action”. In modal dialogues, (e.g. when adding a component to an MDS, a running search can be cancelled by selecting the X in the upper right corner of the search window) (optional).



Figure 27 Close – Cancel options

Only users having the user role with the user permission “**KILL_MY_OWN_SESSION**” set can cancel a running search.

7.2 Determination of search type

The search taking place is specific for each type of module being searched, i.e. for basic substances or other working areas. Therefore, the amount of data found can be limited by the search type.

- **Parts Inventory (optional)**
Only Parts Inventory records will be searched
- **VP (optional)**
Only VP modules will be searched
- **Car Model (optional)**
Only car models will be searched
- **Component**
Only components will be searched
- **Semicomponent**
Only semicomponents will be searched
- **Material**
Only materials will be searched
- **Article (optional)**
Only articles will be searched
- **Mixture (optional)**
Only mixtures will be searched
- **Article / Mixture (optional)**
Both articles and mixtures will be searched
- **Basic Substances**
Basic substances will be searched
- **All MDS/modules**
Components, semicomponents and materials will be searched
Note: As the search will take place for components, semicomponents and materials this search may take some time, rather than a specific search type.
- **Sent**
Searching for sent MDS's
Please see chapter 10.2 "Sent "
- **Received**
Searching for received MDS's
Please see chapter 10.3 "Received"
- **LCM (received requests)**
Please see chapter 11.2 "LCM Requests (Life Cycle Management)"
- **SPM (own requests)**
Please see chapter 11.3 "SPM Requests (SPM)"

- **SEP**
Only SEP requests will be searched
- **REACH request**
Only REACH requests will be searched
- **MACSI (optional)**
Search for MACSI MDS. Please refer to the MACSI manual.

7.3 Search criteria

In the upper part of each template/mask it is possible to enter various search criteria.

A 'wildcard' can be applied to the search criteria as an asterisk (*) to represent unknown characters in a character string. It is valid for any character, in a string. It can be used anywhere in an input string, to define the unknown content. A question mark can be used (?) which represents exactly one unknown character, at that given position or positions in the string. A combination of what you know and what you don't know (e.g. A part no. may contain spaces in its criteria, this must be entered with wildcards (*) or (?) to complete the search successfully (or the spaces must be entered as part of the search string criteria).

If more than one search criteria have been entered, the database of the In-house system will search for data that fulfils all criteria entered.

(it is an 'and-link' except when it is otherwise described in the following (i.e. for GADSL substances or for origin and state).

After inserting all the search criteria, into the various fields, the search itself is started by selecting the 'search' button.

By selecting the 'Reset' button, all search criteria will set back to the default values.

Please be aware that entering too little information may result in a long search time as the system will try to retrieve all the information that matches your criteria. Alternatively entering too much information may result in not finding the information of interest if your search criteria is not 100% correct.

7.3.1 Common criteria

The search criteria have the following meaning:

- **Name**
Descriptive name of the MDS/Module, you want to search for.
The input of the search will be filled automatically with a (*) at the end.
- **Part no.**
The associated part no. that is assigned to the MDS/Module.
The input of the search will be filled automatically with an (*) at the end.
To search for multiple part no., enter the part no. followed by a semicolon (;) then add the next part no.

Regarding the search, the following fields will be considered:

- **Component**
part-/item no
IHS item no
- **Semi component**
Item-/material no
IHS Item no
- **Material**
Int. material no
Std. material no
IHS material no
- **Basic substances**
Name/Synonym
CAS No.
EU-index
Einecs No.
- **All MDS/modules**
All fields above except the “Std. material number”
- **ID No.**
IMDS Module-ID, allocated by creating an MDS/module in the external Online IMDS system.
- **IMDS Node-ID**
The IMDS Node ID of MDS/modules
- **Origin**
Here the search can be restricted to search for either your own or the external supplier of the MDS/modules. The checkboxes can be set individually, or can all be selected at the same time. All selected checkboxes result in a “or”-link (i.e. the system searches for “X as well as for Y” depending on the selected items).
 - External MDS: searches for MDS which do not belong to your own company and that are either accepted and/or published
 - Own MDS: searches for those MDS that are created by your own organisation unit or your own company’s organisation unit.
 - Own modules: searches for those modules that are created by your own organisation unit or your own company’s organisation unit.

Therefore, a user that is assigned to the company’s organisation unit, can search for your own datasets only, for one organisational unit (= the company). If the user has the user permission “ADMIN_MDB” then they can search for your “Own MDS/Own modules” this will result in a search for MDS/modules of all organisation units for your own company.

The information in the supplier’s data of an MDS about the org. unit will not have any impact on searching or editing a MDS, only the creation information (the org Unit of the user who created the MDS/module) decides about the search results.

- **Status with select lists for the IMDS recipient state/IMDS state and checkbox “Int. released”**

Filter for the status of the MDS/module (recipient state/IMDS state):

For each origin “External” and “Own MDS” exists a list, of which state can be selected for the appropriate type selected. If only “External MDS” is checked, only “External MDS” will be included as search criteria.

- All: (Only available for Own) All MDS/modules are searched for, irrespective of the IMDS state, accepted or not.
- Accepted: MDS are searched that have been accepted by the receiver.
- Published: MDS’s are searched that are published in the Online IMDS system. Mostly these are semi components or material MDS’s, created by the IMDS Committee.
- Accepted and published: MDS’s are searched that are accepted or published.

The selected lists are combined with their corresponding origin checkboxes (e.g. search for external published MDS’s as well as for own accepted MDS).

- Int. released: your own data gets searched that is internally released.

If no origin checkboxes are selected, then by default the “External MDS” will be automatically searched for accepted or published MDS’s.

This selection criteria are combined with the other available search criteria (e.g. name, etc...) and the results might be limited further.

- **Current version**

If there is more than one internally released version available of an MDS/module, that fits the search criteria, only the highest version will be displayed, if this option is activated. Furthermore, all MDS/modules will be listed that are not internally released and fit the search criteria.

- **Only DSR (Dev.SampleReport)**

Only MDS/modules with the flag “Development sample report” set will be searched for.

- **Only Flat bill**

Only MDS/modules are searched, that were created by the flat bill process (please refer to the Flat bill documentation).

- **Supplier-/organization unit**

Using this option, it is possible to search for MDS’s created by a certain supplier. The name can be entered directly (with wildcards) or by the additional supplier selection dialogue (by selecting the “search-organisation-unit button”). It is possible to search for a supplier, which will then be copied into the search field.

Within the search screen, companies can be selected. Select “companies” the search result list will either contain only company entries or also matching organization units

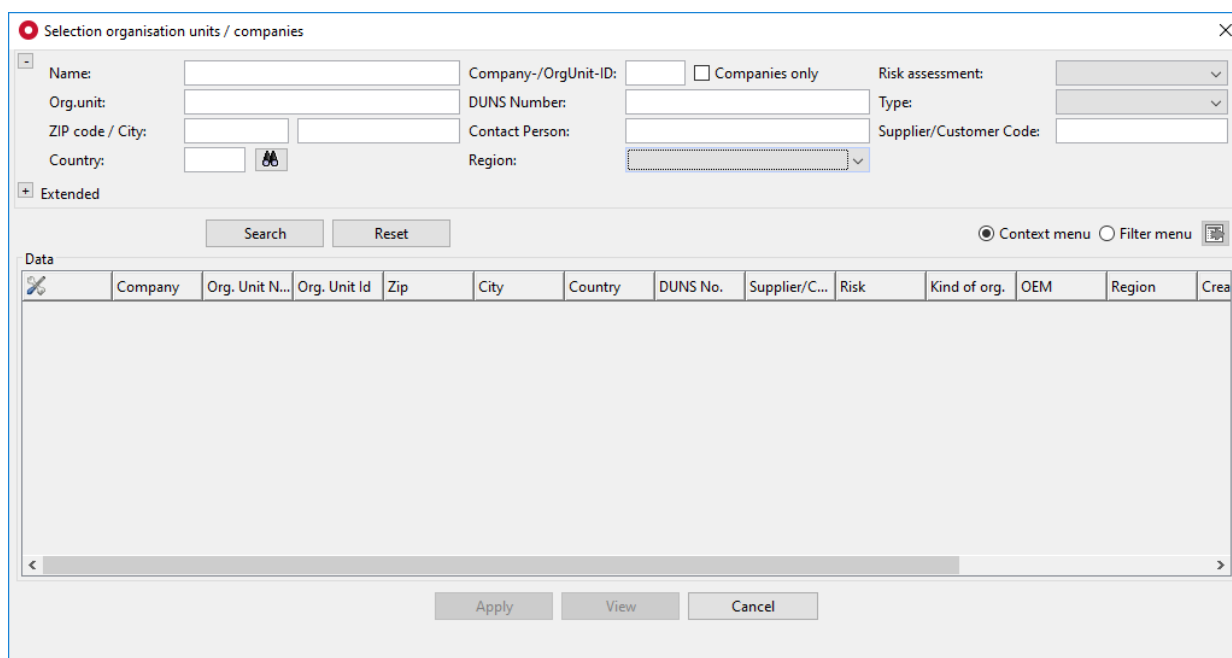


Figure 28 Search for Supplier/Organization

The following options are available

- **Name**
You can search for the company by name
- **Company/Org Unit-ID**
You can search for the company if you know their Org Unit ID
- **Companies only**
You can select only to list companies
- **Risk assessment**
You can search using a risk assessment criterion (If configured and populated)
- **Org Unit**
You can search by the companies Org unit name
- **DUNS Number**
You can search for the company by its assigned DUNS number (If applicable)
- **Type**
You can filter companies that are classified as a specific type (i.e. IMDS Org Unit)
- **Zip code/ City**
You can enter specific Zip code and/or City where the company is located
- **Contact Person**
You can search for a contact person within the company.

- **Supplier/Customer code**
You can search for the Supplier / Customer code if applicable. Up to 50 supplier codes can be entered in the format (**SUP1;SUP2;SUP3;SUP4;SUP5;SUP6 etc..**) supplier code followed by a (semi-colon) ; etc....An error message will appear if you exceed the allowable limit.
- **Country**
You can search by Country using the spyglasses and a new dialogue box opens allowing you to search and pick from a list.
- **Region**
You can filter by selecting a specific region from the drop-down list.
- **Contact person**
You can search for a contact person within the MDS. The name must be entered according to the format in the Online IMDS system. Type the first name and surname of the contact
- **Creator of MDS/Module**
You can search for a creator of an MDS/Module. The name must be entered according to the user administration.
If a MDS/Module was created from the download from the Online IMDS system (or PDM/SAP/CSV Import), the user will be "IMDS" or "System".
- **Date (last change) from ... to**
Search containment for MDS/modules that have been amended in a specific timeframe.
The date can be set manually or by using the calendar symbol.
- **Date (HPE creation) from ... to**
Search for MDS/modules that were created in the Online IMDS system in each timeframe. This field has been populated since IMDS Version 6 (April 2008). Therefore, all MDS/modules which were created before this date will not be found using this criterion, because the field will be empty.
If the MDS/module was created in iPCA/his, this is the date of the first successful upload to the Online IMDS system.
The search field can be set manually or by using the calendar symbol.
- **IHS Comment**
Search for MDS/modules with a specific comment content.
- **Status**
Search for MDS/modules that have a different status other than "Active"

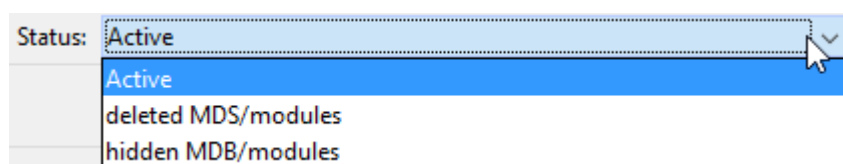


Figure 29 Search criteria - Status

7.3.2 Additional criteria for materials

Materials have the following additional search criteria: Other specific customer options are available.

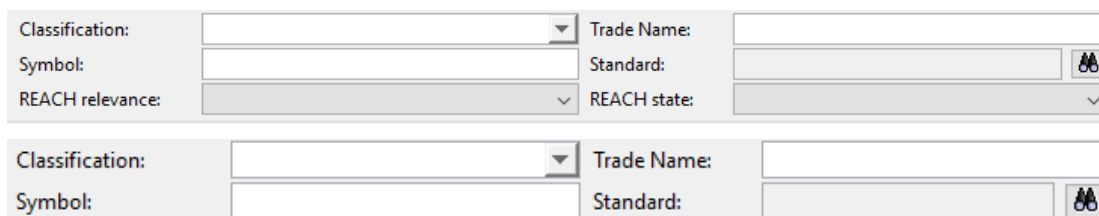


Figure 30 Additional search criteria for materials

- **Classification**
You can choose from the drop down, one of the IMDS material classifications from the list.
- **Trade name**
You can search for a trade name.
- **Symbol**
You can search for the symbol of a material (only plastic materials will have a symbol).
- **Standard**
Using the spy glasses, a dialogue box opens allowing selection of a specific norm type that can be used for searching.

7.3.3 Additional criteria for all MDS/Modules

For all MDS/Module additional search criteria are available:

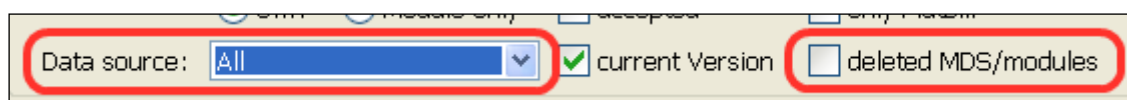


Figure 31 Additional search criteria for MDS/modules

- **Data source (optional)**
For searching of MDS/modules from external sources
- **deleted MDS/module**
Also MDS/module can be searched for, that have been transferred by using the flag “deleted” or those who have been deleted by a user.
Note: MDS/module existing only locally (without an IMDS-ID) physically gets deleted. Therefore, you cannot search for them anymore.

7.3.4 Criteria for basic substances

For basic substances, specific search criteria are available

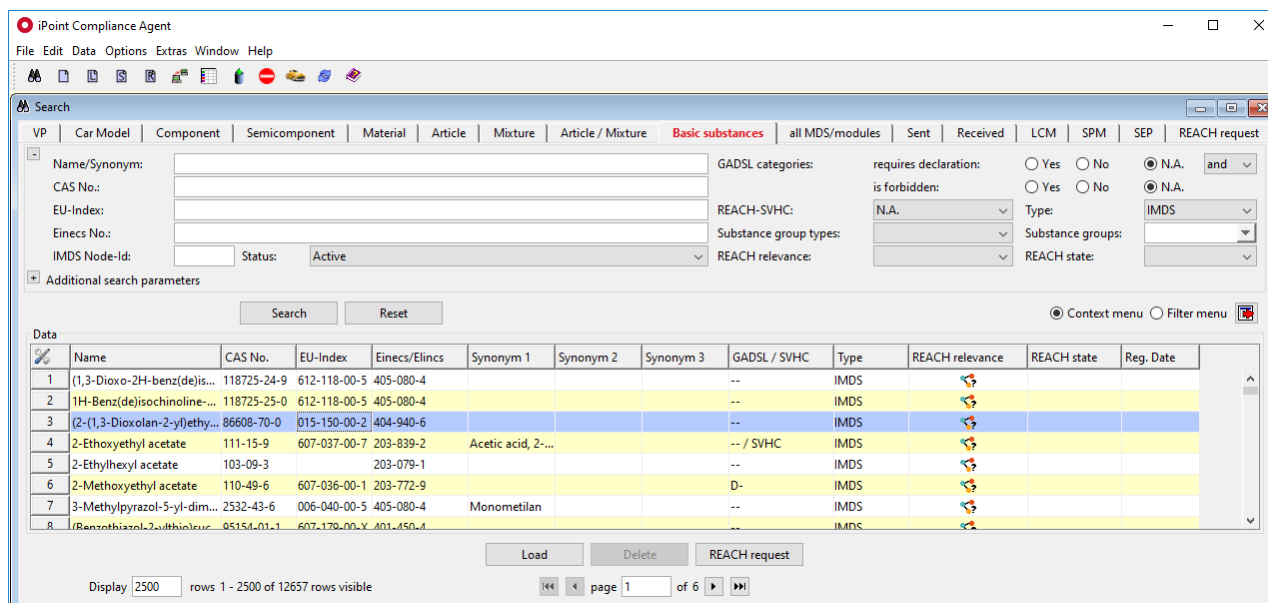
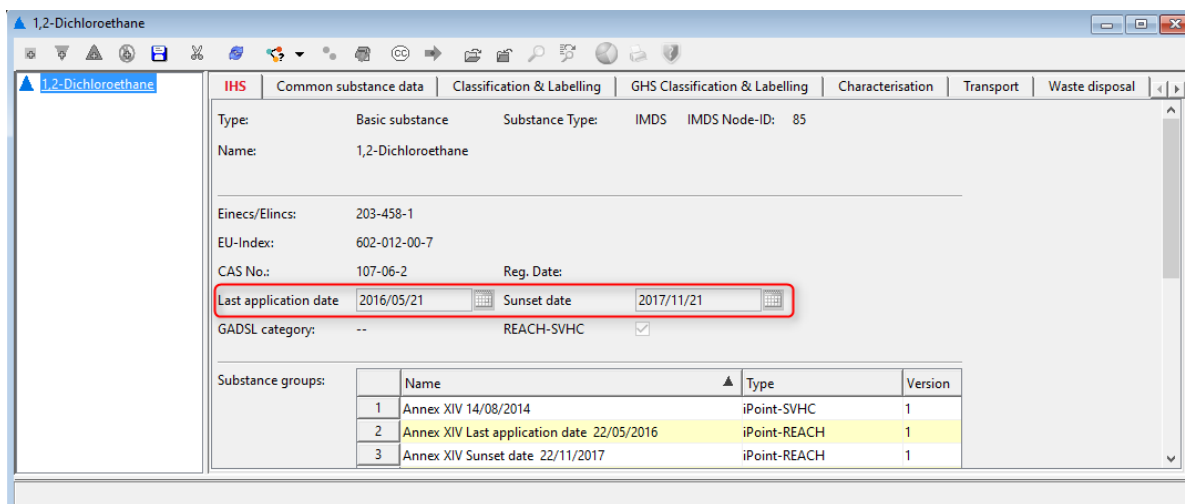


Figure 32 Search criteria for basic substances (Type IMDS)

- **Name/Synonym**
Name or synonym of the basic substance to use for search
- **CAS No**
The CAS no. of the basic substance (CAS = Chemical Abstract Service)
- **EU-Index**
The EU index no. of the basic substance
- **EINECS-No.**
The EINECS no. of the basic substance (EINECS = European Inventory of Existing Commercial Chemical Substances)
- **IMDS Node Id**
The unique number key of the Online IMDS system.
- **GADSL category**
The GADSL category of the basic substance (GADSL = Global Automotive Declarable Substance List)
 - requires declaration
 - forbidden
 - And/or:
This defines whether to find substances that fulfil both GADSL criteria or at least one of them.

- **REACH-SVHC**
Select whether to search for REACH SVHC's or not.
- **Substance group type**
Different types of substance groups can be selected. Other options may be available.
 - All
 - IHS (optional)
 - IMDS
 - Jama/Japia (optional)
 - iPoint-GADSL
 - iPoint-SVHC
 - etc.
- **Substance group**
Select a group from the list. This list will be dependent on your selected substance group type
- **Status**
The state of the basic substance
 - Active
 - Inactivated
 - Hidden
 - All

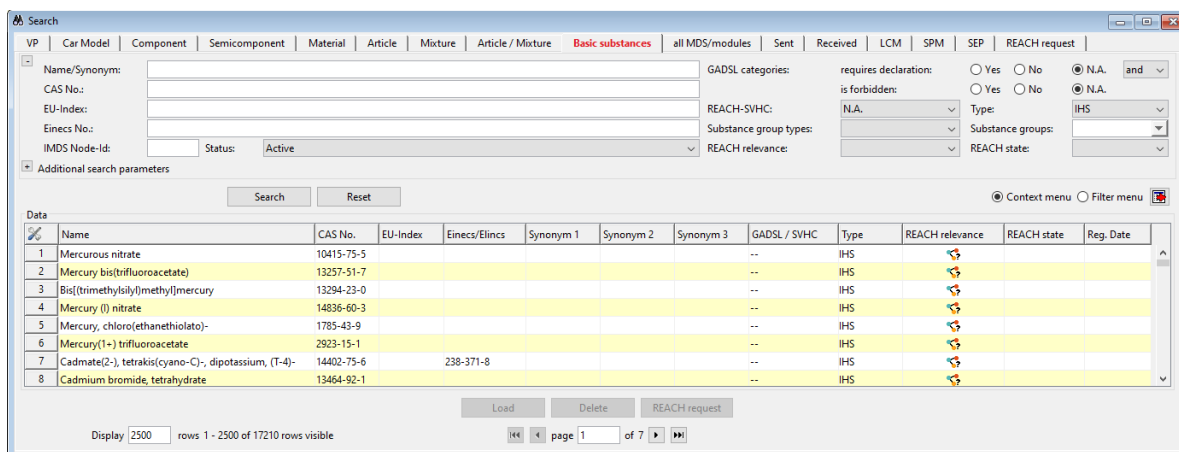


Name	Type	Version
1 Annex XIV 14/08/2014	iPoint-SVHC	1
2 Annex XIV Last application date 22/05/2016	iPoint-REACH	1
3 Annex XIV Sunset date 22/11/2017	iPoint-REACH	1

Figure 33 Basic substance information (Type IMDS)

The following additional information is visible but un-editable:

- Last application date
- Sunset date



Search criteria for basic substances (Type IHS)

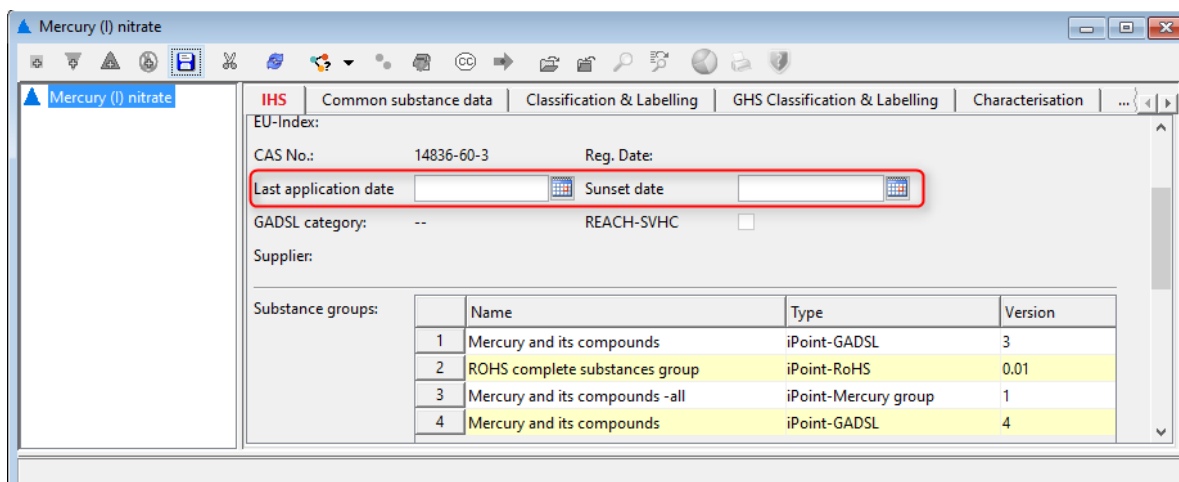
Search filters:

- Name/Synonym:
- CAS No.:
- EU-Index:
- Einecs No.:
- IMDS Node-Id:
- Status:
- Additional search parameters:

Search results table:

Name	CAS No.	EU-Index	Einecs/Elincs	Synonym 1	Synonym 2	Synonym 3	GADSL / SVHC	Type	REACH relevance	REACH state	Reg. Date
1 Mercurous nitrate	10415-75-5						--	IHS			
2 Mercury bis(trifluoroacetate)	13257-51-7						--	IHS			
3 Bis(trimethylsilyl)methylmercury	13294-23-0						--	IHS			
4 Mercury (I) nitrate	14836-60-3						--	IHS			
5 Mercury, chloro(ethanethiolato)-	1785-43-9						--	IHS			
6 Mercury(1+) trifluoroacetate	2923-15-1						--	IHS			
7 Cadmate(2-), tetrakis(cyano-C)-, dipotassium, (T-4)-	14402-75-6		238-371-8				--	IHS			
8 Cadmium bromide, tetrahydrate	13464-92-1						--	IHS			

Figure 34 Search criteria for basic substances (Type IHS)



Mercury (I) nitrate

EU-Index:

CAS No.: 14836-60-3 Reg. Date:

Last application date: Sunset date:

GADSL category: -- REACH-SVHC: ☐

Supplier:

Substance groups:

	Name	Type	Version
1	Mercury and its compounds	iPoint-GADSL	3
2	ROHS complete substances group	iPoint-RoHS	0.01
3	Mercury and its compounds -all	iPoint-Mercury group	1
4	Mercury and its compounds	iPoint-GADSL	4

Figure 35 Basic substances information (Type IHS)

The following additional information is visible and editable:

- Last application date
- Sunset date

7.4 Search results

If a search is successful, the associated data records will be displayed in the search results panel. Each row represents the found MDS or a module that fulfils the entered search criteria. If no data records are found the message 'No data found' will be displayed. You either accept the message is accurate or you should relax/change your criteria and try again.

7.4.1 Sort sequence

A standard sort sequence for components, semicomponents and materials and MDS/module is:

- Name
- Part no.

If the configuration parameter FILTER_PSEUDOCOMPANIES_4STANDARD_SEARCH is set, then the found dataset from the IMDS Committee companies will be listed first.

The standard sort sequence for substances is:

- Name
- CAS no.

7.4.2 Column Headings

The columns have the following descriptions:

- **Column ARTICLE NAME**
This is the name that has been assigned when a component/semicomponent/ material has been created.
From IMDS Release 12 on, the English material names are always displayed.
- **Column PART No.**
Part No. or Material no. that is assigned in the Online IMDS system.
- **Column IHS ITEM-No.**
This column represents the IHS Part-/Item-/Material-No. for the created MDS/modules.
It is not available in the web application.
- **Column MODULE STATE**
Describes the internal module status:
 - MDS/module is still "in process"
 - MDS/module has the status "ready"
- **Column IMDS_ID**
If an IMDS data record is available, the column contains the IMDS-ID and Version no. assigned in the Online IMDS system.
If the column is empty (i.e. only a '/' is available) a new MDS/Module has been created and not yet been sent to the Online IMDS system. This MDS/module needs to be transferred to the Online IMDS system after editing.

- **Column Flat bill**
Components that were created using the flat bill process will be marked with a “1”. All other components will have a “0” in this column.
This column is only available for components and MDS/modules.
- **Column SUPPLIER**
Displays the name of organisational unit to which the MDS/module belongs.
- **Column Creation date**
Displays the IMDS creation date, for those MDS/modules that exist in Online IMDS system, otherwise it is the internal IHS creation date.
- **Column DSR (optional, only displayed if Module “Prototype MDS” is licensed)**
Represents the value of the field for Development Sample Reports

7.4.3 Modification of the search result list

The results list can be modified by the user in several ways

- **Sorting the results**
Select the “title” of a column, the column will be sorted in ascending order.
By selecting the column title again, the column will be sorted in descending order.
The current sort order will be displayed by the following symbols (▲, ▼).
- **Change the column width**



By holding down the cursor on the strip line between the different columns, then dragging it left or right will either increase or reduce the column width

7.4.4 Actions within the search result list

The following actions can be executed for a selected MDS/module:

- **Load**
Select the row from the results by clicking on any field in the row. Then select “load” the selected MDS/module will be loaded. In the following pop-up, the opened MDS/module can be modified, if;
 - it is an “own MDS/module”
 - it is in mode “in process” and not internally released
 - it is not in handshake mode

- **Copy**

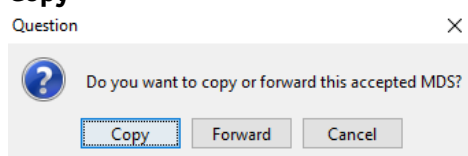


Figure 36 Copy an MDS

The selected MDS/module will be copied including the entire structure tree.

The part/item/material-no. will be extended with a unique number, to be able to differentiate the new copy from the original one.

Then the new record is loaded into the editing screen, and the MDS/module is ready to edit the data.

Now the copied part/item/material-no. can be corrected and saved to the new required value.

This new data record is treated like a new created MDS/module and has to be uploaded to the Online IMDS system after the editing is complete.

For older data with structure errors (basic substances directly used within a component or semi component) the copy process will create a new material. Inconsistency of weight or percentages that may occur, must be corrected manually by the user.

If a substitution rule exists for the MDS/modules or basic substances, then these will be used, as in the process for creating a flat bill, which is described in separate documentation (please refer to chapter 5.2).

Only users with the appropriate permissions are allowed to copy an MDS/module (please refer to the user manual of the user management).

- **Copy – Forwarding**

If the selected dataset is an accepted foreign MDS, then a question dialogue box appears in which the user can decide if the MDS will be copied (see above) or will be forwarded.

Forwarding represents a special sort of copying. The structure tree with the detail data is carried over from the original MDS without any changes. This detail data cannot be changed further, and the user must edit the supplier data. You can add a new recipient (if desired) if it is your own, forwarded MDS.

The following restrictions apply:

- A foreign MDS (= Original MDS) can only be forwarded if, the flag “Forwarding allowed” has been set within the recipient data tab.
- The original recipient accepted the MDS.
- The MDS is of the type component, semicomponent or a material
- A forwarded (= own) MDS. Only the supplier and recipient information can be changed. Only specific edit functions are allowed for these MDS's.
- Only one forwarded version of an accepted MDS is allowed. A new copy or a new version cannot be created from a forwarded MDS.
- A forwarded MDS cannot be used in your own MDS/modules. Only the Original accepted MDS can be used. If such an MDS is already referenced in older data, then the Q-Checker will pick this up and the MDS cannot be uploaded to the IMDS online system.
- A forwarded MDS can only be proposed or internally released.
- The upload of a forwarded MDS is internally processed in two steps. Depending on the interval of the upload background process, it might be a while before the MDS is available in the Online IMDS System.

The relationship between Foreign/Original MDS's and Own/Forwarded MDS's is apparent within the detailed data. The arrow for displaying additional MDS information is displayed with a pale background, and opening the information shows a button with that the corresponding MDS can be loaded and displayed.

- Original MDS points to the forwarded MDS
- Forwarded MDS points to the Original MDS

More information can be found in the respective user manual or the extended description of the IMDS online system, referring to Forwarding of an MDS.

Only users with the appropriate user permissions are allowed to forward an MDS/module (please refer to the user manual of the user management).

- **New version**

If an MDS/module is available in the Online IMDS system and has the IMDS-Status “**internally released**” (depicted by the version no. number) then the structure tree cannot be changed. The only way to change it, is to create a new version of this MDS/module.

By click on the button “**New Version**” the new version will be created. The IMDS-ID will be taken over from the source datasheet and the version is set to “**999.01**”. If another new version of the same source datasheet is created before the datasheet with the version “**999.01**” is uploaded to the IMDS online system, the version will be incremented by 0.01 (i.e. this means from “**999.01**” to “**999.02**” and so on).

These newly created MDS/modules must be uploaded to the IMDS online system. If there are multiple new versions (999.01 etc.) the version’s generation occurs in the order the data records have been found during the search, this is not necessarily the order they have been placed originally (with the smallest version no. upwards).

To avoid misunderstanding, referring to the version orders, only one new version of a MDS/module should be available locally, and should be finished and uploaded in the Online IMDS system as soon as possible.

If there are substitution rules for MDS/modules or basic substances, then those will be used as in the process for creating a flat bill which is described in a separate documentation (please refer to Flat Bill chapter 5.2).(Please also see chapter 4.2).

The button is enabled only if below conditions are met:

- exactly one MDS/module is selected
- MDS/module has IMDS ID
- MDS/module belongs to the own company
- Organisation unit to which the selected MDS/module is assigned to matches with the organisation unit to which the user is assigned to (this condition is not considered if the user has permission “**ADMIN_MDB**” granted)
- Type of the selected MDS/module (component/semicomponent/material) matches with the permission for creation of new version granted to the user
 - NEW_VERSION_COMPONENT (allows to create new version of component)
 - NEW_VERSION_SEMICOOMPONENT (allows to create new version of semicomponent)
 - NEW_VERSION_MATERIAL (allows to create new version of material)

- **Delete**

By click on the “**Delete**” button and confirming the question the data record is deleted in various ways:

- If it is an “own MDS/module” and only locally available (i.e. the IMDS-ID is not filled in) the data record is deleted immediately.
- If it is an “own MDS/module” and already exists in the Online IMDS system, the MDS/module will be also automatically deleted in the Online IMDS system. Internally the data record is only marked as deleted, (i.e. the deleting is only logical) The data record is not visible in the summary lists anymore, but still exists in the local database.

- If an MDS/module that is only internally marked as deleted, is to be deleted also in the Online IMDS system, then a search for this deleted dataset has to be done. After selecting the dataset, “Delete” must be selected. Both question for deleting must be answered with “Yes”. With this confirmation, the upload state will be set to delete.
- To reset the upload state, the MDS/module must be loaded, and the button for resetting the upload state has to be selected before the background process, processes the dataset to upload.

An external MDS (received by a supplier or a published MDS) will be deleted immediately after confirmation.

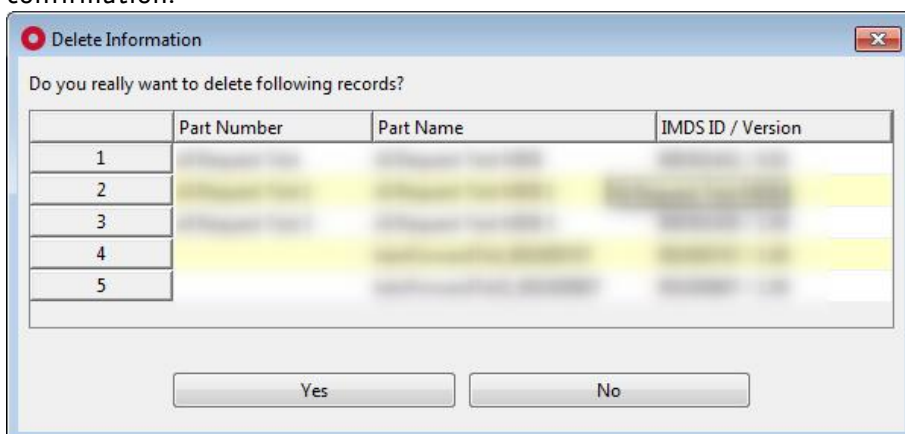


Figure 37 MDS/module deletion confirmation dialog

Upon finished deletion process, the deletion information report is displayed. It shows the records that were successfully deleted as well as records that could not be deleted.

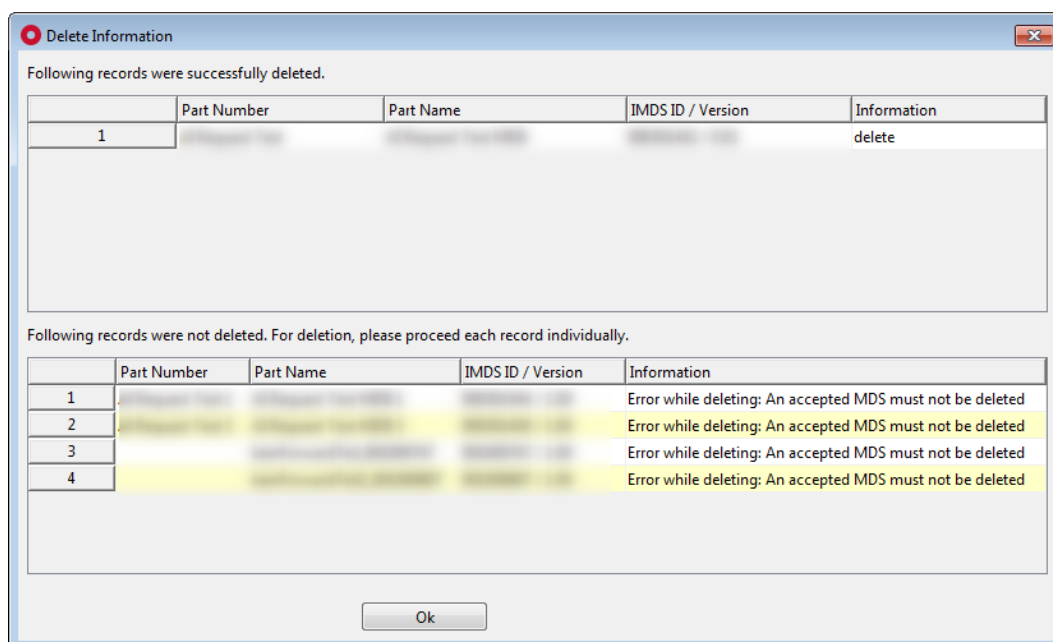


Figure 38 MDS/module deletion information report

PLEASE NOTE: It is not possible to restore a deleted MDS.

The following MDS/Module cannot be deleted:

- An MDS/Module that is used by other MDS/Modules
- An MDS/Module of parts, from which a flat bill has been created.
- An MDS assigned to iPCA/LM or iPCA/SPM in process
- An own MDS/Module that already exists in IMDS and for which new version (999.xx) exists in iPCA

To perform a deletion, the user must have the appropriate user permission(s):

- **“DELETE_MDSS_NON_INTERNALLY_RELEASED”** allows to delete MDS/modules that are not internally released
- **“DELETE_MDSS_INTERNALLY_RELEASED”** allows to delete MDS/modules that are internally released

- **To MDS**

This button will only be active, if the selected row is a module.

If this module should be sent to another company as an MDS, or be published, you can convert the marked module to create an MDS.

Afterwards the conversion, the MDS details can be edited. This function is only available if a new module has been created, or the MDS is in "edit mode". It is not allowed to create a MDS from a module, if the module has been released internally, or a version is available in the Online IMDS system.

- **Compare (optional)**

This button is active only if 2-5 components are selected in the result list and it allows to compare them using different attributes (see **chapter 30**).

PLEASE NOTE: This button is displayed only if the Compare module is licensed and if the user has the permission “**COMPARE**” granted in his role.

- **Export**

This button can be used to export the results of the actual search, to a CSV or excel-file. In the case of the search result lists, and some other points (e.g. MDS/Module analysis result) additional header information is added to the export file.

By using this button, the following pop-up will appear:

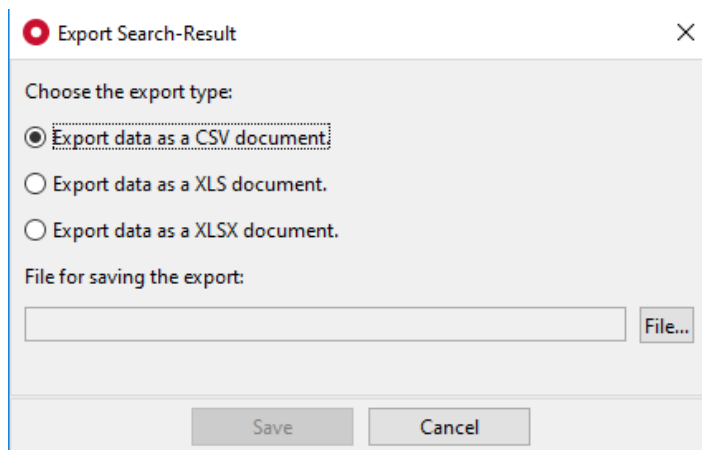


Figure 39 Export of a search result list

Please choose your desired output format, and the location to save the file (Select “save” or if you don’t want to save the output file, select “cancel”).

To be able to export the complete search results list, the configuration parameter FULL_EXPORT_MODULE must be set. With selecting “**Export all**” and the insertion of the export file name, a DB job will be created, that exports the complete search result and stores them within the database. The job name will have the format “**Search Export: tab_name - file_name**” and its result can be viewed via the DB-Job management (for this function the user permission ADMIN_JOBS must be set).

8 Creating a new MDS/module

To create a new MDS or Module select "Create MDS/module" from the menu.

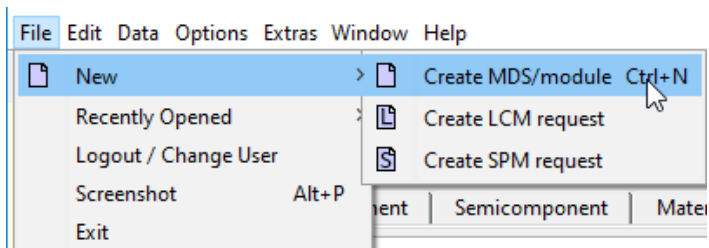


Figure 40 Creating a new MDS/module

Then the following screen appears:

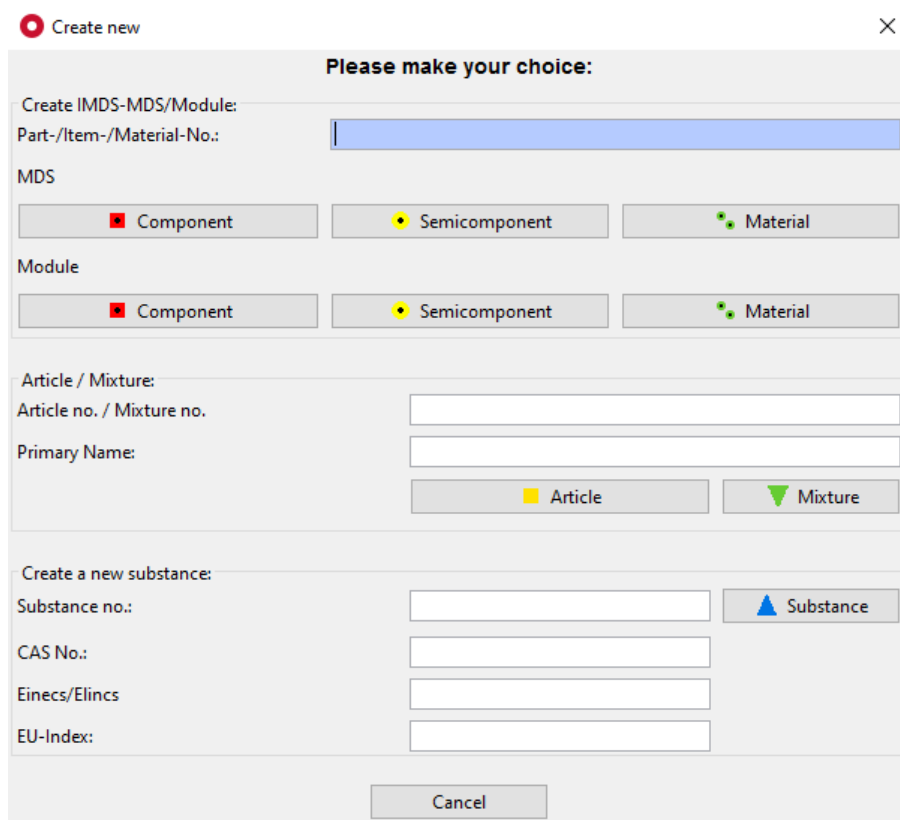


Figure 41 Create an MDS/module

Select the type of node (MDS or Module) and the type of structure (component, semicomponent or material) you want to create. Selecting the respective options, creates a new data record. On selection, the editing screen appears for editing the details of the new MDS/module.



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IHS

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When entering the part/item/material no. it will be added automatically during a creation of the new module, into the internal part/item/material no. When you create a new MDS, additionally this number will be added to the (IMDS-) part/item/material-no.

Other specific customer options may be available. See the related user manual. Selecting "Cancel" the creation of the new MDS/module will be cancelled.

9 Editing an MDS/module

9.1 General

Editing the MDS/Module will be processed by choosing a standard edit panel:

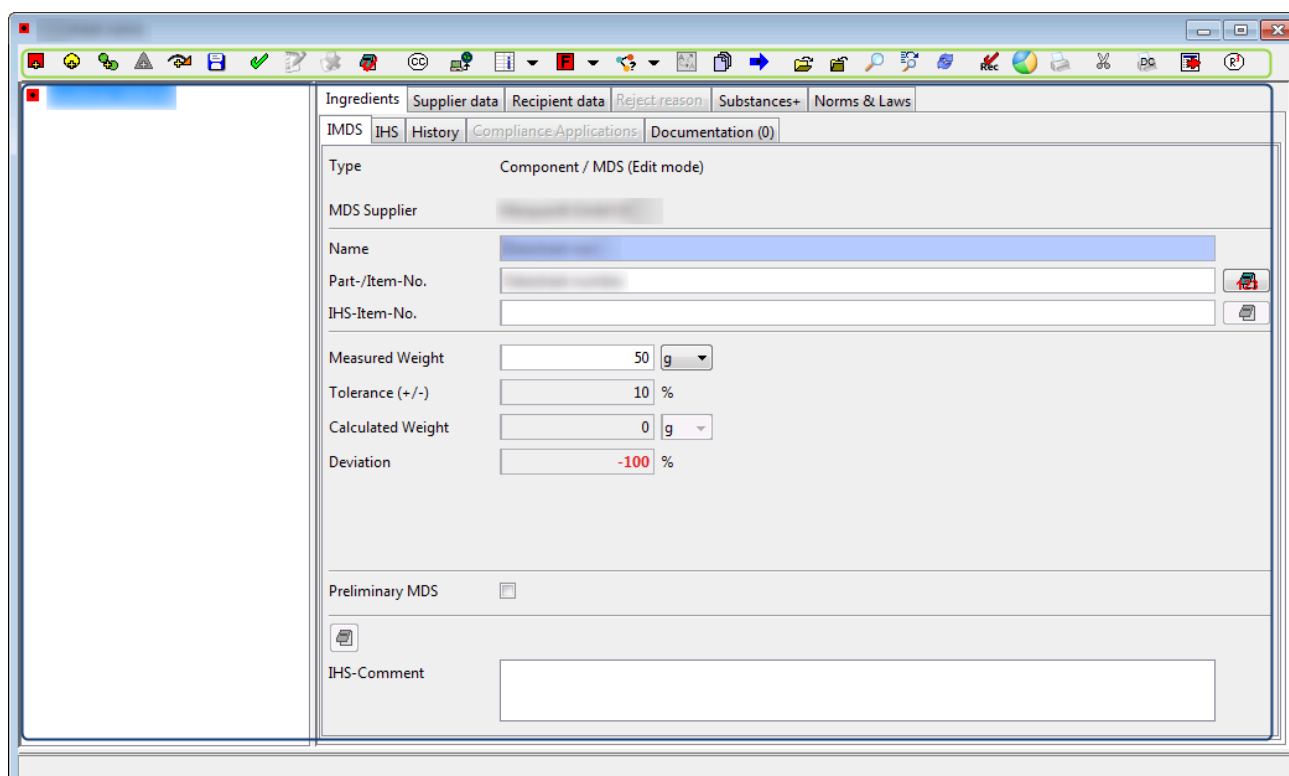


Figure 42 Editing MDS/modules

The screen is structured in two parts:

- **Actions (green area)**
See chapter 9.3 “Actions”.
- **Editing part (blue area)**
The editing screen is also divided into two parts, inputs and display
- **Ingredients**
On creation, the edit mode is the default setting.
See chapter 9.4 “Ingredients”.
 - **Supplier data (only MDS)**
See chapter 9.5 “Supplier data”
 - **Recipient data (only MDS)**
See chapter 9.6 “Recipient”.

- **Reject reason (only MDS)**
See chapter 9.7 “Reject reason”
- **Status symbols (yellow area)**
See chapter 9.2 “Status symbols”.

9.2 Status symbols

The status symbols are in the upper right corner of the details screen. They provide information about the status of the selected MDS/module/basic substance.

- **Deleted** 
The selected MDS/Module or basic substance is deleted in the Online IMDS system or cancelled by sender.
- **Hidden** 
The selected basic substance is hidden in the online IMDS system.
From IMDS Release 5.0 on, the materials from the IMDS pseudo companies can have this status.
- **Deactivated** 
The selected MDS cannot be used, as it was marked as “deactivated” (see chapter 20)
- **IHS Ready** 
The MDS/module has the status “IHS ready”. This means that the MDS/module has passed the Q-checker checks without any errors found. Now it can be sent or proposed in the Online IMDS system (if it is an MDS).
To reset this status, just use the appropriate symbol from the actions again.
- **Upload** 
For this MDS/module an unfinished upload process exists.
This can be while explicitly selecting the MDS/module for upload or implicitly as this MDS/module is contained in another MDS/module for which an upload was specified. If this symbol is shown, the MDS/module cannot be edited.
As soon as the upload is finished, the symbol will not be displayed any longer.

9.3 Actions

9.3.1 Functions

The application provides functions for you to structure the active MDS/Module.

Select the node/position in the tree where you want to perform your action. Your action will be added to/below the node you select depending on the function used.

Only icons applicable to the action you are performing will be active and available for use.

The following functions are available:

- **Add component**

A dialogue box will appear –you have various options, to add a “New Node”, add an existing component, by searching for an “existing Module/MDS” or add a new component as a “Missing position”

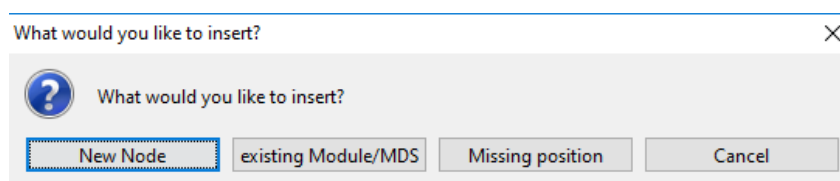


Figure 43 Add component dialogue box

Selecting “**New Node**” a component will be added as simple node to the tree structure. This will be created below the highlighted/selected position in the tree.

Selecting “**existing Module/MDS**” a dialogue box appears, where you can search for existing components. After creating a component, the same actions and processes are available as described below in “**Add MDS/module**”.

Selecting “**Missing position**” this simple node works as placeholder for a MDS/module, that still has to be created or accepted. ? N/A (0 EA)

By deselecting the tick box in the input screen and saving, this missing position node will be converted to a simple node (one-time): N/A (0 EA)

- **Add semicomponent**

A dialogue box will appear (Same options as adding a component)–You have various options to add a “**New Node**” (semicomponent), add an existing semicomponent by searching for an “**existing Module/MDS**” or add a new semicomponent as a “**Missing position**” (see figure above).

Selecting “**New Node**” a semicomponent will be added as simple node to the tree structure. This will be created below the highlighted/selected position in the tree .

Selecting “**existing Module/MDS**” see description below “**Add MDS/module**”.

Selecting “**Missing position**” see description above “**Add component**”.

- **Add material**

To add a material to an MDS/module (a material is always at least a module) select the node in the tree, then the respective button “**Add Material**” has to be selected. A dialogue box appears, where the required material can be searched and added.

By marking a corresponding data row, the same actions and processes are executed, as described per “**Add MDS/module**”.

- **Add MDS/module**

Selecting the option “**Add MDS/module**” a dialogue box appears, where the required MDS/module can be searched for and added.

Select the MDS/module, then select “**Apply**” The MDS/module will be added as the last node in the tree structure. Adding a MDS/modules builds only a reference. The editing of the added node is not possible, as it is only referenced to the original. You can only modify the weight or tolerance

percentage data. To edit the added MDS/module data, you must double click on the node to open it. It will open in a separate window.

If a MDS/Module was referenced, you have the option during the process to add an internal number.

Selecting “**Cancel**” this process will be aborted without any changes.

It is not possible

- to add the same MDS/module twice on the same level.
- to add a received MDS that has not been accepted.
- to add a MDS/module that already exists within the path of the parent node to the top level node (which would be contained within itself); the error message “No MDS/modules may be added if they are already in the direct path!” will appear.

- **Add Basic Substance**

A material is composed of basic substances. Only for materials, is it possible to add a basic substance.

- **Save**

Changes are saved automatically when selecting another tree node.

Changes are also saved automatically when leaving an entry field.

Despite this, it is recommended to save changes at regular intervals, (e.g. after doing one of the actions described above, or after editing the detail data of a node).

- **Quality Checker (Q-Checker)**

This function checks the tree structure for various issues.

When the checks are run, any errors in the tree structure will be displayed in a separate window and will allow you to make corrections.

Several checks can be assembled to create a check configuration. The configuration that is being used for checking, can be displayed with the menu “Options → Checks → Checks in use – Quality Check”.

Depending on the node count of the MDS/module, a window will appear allowing you to decide which checks should be performed for this specific action.

Details about the checks and their configuration can be found in additional documentation.

- **Set/reset the module status**

If an MDS/module is completed and all data has been entered correctly, the module status has to be set to ‘IHS Ready’.

With this status, other users will be aware that the given MDS/module, is locally finished and ready to be uploaded to the Online IMDS system.

This status can only be set, if the complete MDS/module does not contain any errors. All own, MDS/modules that are referenced, which are still in the status “Edit mode” are also set to “IHS Ready” when performing this action to the top-level node. Only upload relevant checks are performed for this action. If the recommendation checks are done, the user can configure this by editing the configuration under “**Options → Checks → Checks configurations**”.

Details for editing checks are described in a separate documentation.

If the status is set, the symbol will appear in the first row of the detailed data, next to the ‘type’ definition.

If the status “**IHS Ready**” is set, this status can be reset by selecting the button again. This will change the MDS/module back, if the MDS/module is not internally released (e.g. in this case a customer has rejected the MDS or the MDS/module is in the Handshake-Mode).

This status describes the editing process for the In-house system, and needs to be an independent status, irrespective of the status ‘internally released’ which is assigned to the MDS/module in the IMDS online system.

PLEASE NOTE: This status is prerequisite for the upload to the external Online IMDS system. Only when this status is set, all dependencies will be checked before uploading. Additional uploads will be requested by the system to ensure the completeness of the upload of the MDS/module to the Online IMDS system.

- **Use of the Compliance Checker (optional)**

Using the Compliance Checker, you can check the MDS regarding a specific requirement (e.g. EU ELV compliance).

Details about the Compliance Checker are available in separate documentation.

- **Upload to IMDS**

With this selection, the current MDS/module can be sent to the Online IMDS system.

After selection, a dialogue box will open:

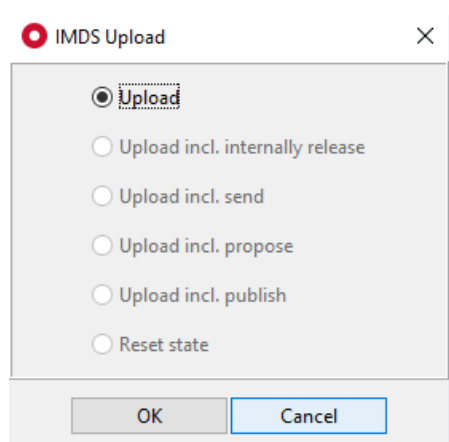


Figure 44 IMDS upload selection

Depending on the status of the MDS/module, the relevant options are active.

Details for these options are described in the following chapter “IMDS Upload Information”.

Hint: If the option “Upload” is selected, only the “root” MDS/module will be uploaded. No information regarding the tree structure will be uploaded to the Online IMDS system.

Attention: With this functionality, the MDS/module is marked for uploading and this will be processed by a background process automatically. After setting the status and during the MDS/module upload process, this will be displayed by a special icon to the right of the icon “IHS Ready”. While the MDS/module is being processed, it cannot be edited.

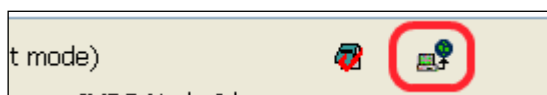


Figure 45 Icon to display an active upload process to IMDS is running

- **Display additional node data in the tree view** 

Allows to display additional node data in the datasheet tree view.

Upon click on the button, all possible options are activated, button gets new symbol  and nodes in the datasheet tree view enriched with relevant symbols, if applicable.
- **Open a list with individual options for enrichment of the tree view display** 

When using this symbol, a list with individual options will open:

 - **Show open SPM requests** 

Upon click on the button, all relevant nodes of defined type (for more details see description of the configuration parameter “**MDS_SPM_OPEN_REQUEST_CHECK**” in **chapter 33.3**) with open SPM request having matching part number are enriched with a symbol  that is added to the right from the node description.

When the display of this data is activated, the button has the symbol .

PLEASE NOTE: In order to display existence of an open SPM request for newly added node, the currently edited datasheet needs to be reloaded or refreshed.
 - **Mark missing positions with open received MDS** 

Upon click on the button, all nodes of type missing position with open received MDS having matching part number are enriched with a symbol  that is added to the right from the node description.

When the display of this data is activated, the button has the symbol .

PLEASE NOTE: In order to display existence of an open received MDS for newly added missing position, the currently edited datasheet needs to be reloaded or refreshed.
- **Create a Flat bill (FBOM)** 

A flat bill for the selected component will be created.

Please refer to the flat bill documentation.
- **Open a list with more ways to convert a MDS/create other data objects** 

When using this symbol, a list with more conversion options will open:

 - **Create a preliminary MDS (optional)** 

For details see chapter 22 “Prototype MDS (optional)”.
 - **Create a product model (optional)** 

For details see chapter 26 “Car-/Product model”

For the actual MDS/module a new entry in the product model will be created, with a list of the referenced supplier MDS’s and existing missing positions.
 - **Create a MACSI MDS (optional)** 

A copy of the actual MDS/module will be created, that reformats it to the convention of PSA MACSI system. After editing this MACSI MDS it can be uploaded to the PSA MACSI System (analogical to the IMDS upload).

Further details of the MACSI MDS functions can be found in separate documentation.

- **Replacement of missing positions**

Depending on the state of the loaded dataset, the following options are possible with this functionality:

- **Replace “nonexistent” positions with an actual MDS/Module**

If the loaded MDS/module is a received, accepted MDS, or is an own MDS/Module and has the state “IHS Ready” The system will check this MDS/Module against the data pool for missing positions for an own MDS/modules with the given part-/item number. If missing positions exist that match the criteria, the MDS/module will be assigned automatically.

- **Replace “nonexistent” positions within the tree**

If the MDS/module is an own dataset and it is not in edit mode, and it contains missing positions in its tree structure, then these placeholders can be replaced by selected MDS/modules. Like the function of replacing old versions (see below) A part number search will be performed for all missing positions (i.e. with its IHS item number) in the tree beyond the selected node. The result will be displayed in a newly displayed edit dialogue box. With a second step, the user can select one to many rows, this data will be consecutively replaced (Please see “Replacing old versions” and the description for replacing a missing position with the context menu of the tree structure in chapter 9.3.2).

- **Set flexible version** / **Remove flexible version**

Icon, name and function of this button is interactive:

- If an own MDS/module in “**Edit**” mode, which is not yet set as a flexible version, is opened, the label of this button is “**Set flexible version**” and the icon is . This allows to assign an already existing own MDS/module as a predecessor or opened MDS/module. Upon click on the button, standard component/semicomponent/material (depending on the type of opened MDS/module) search panel will open to search for the wished predecessor MDS/module (depending on the type of the opened datasheet). Upon selection of wished datasheet and click on the “**Apply**” button the next up version (999.xx) will be assigned to the opened MDS/module and the notification is shown to the user.

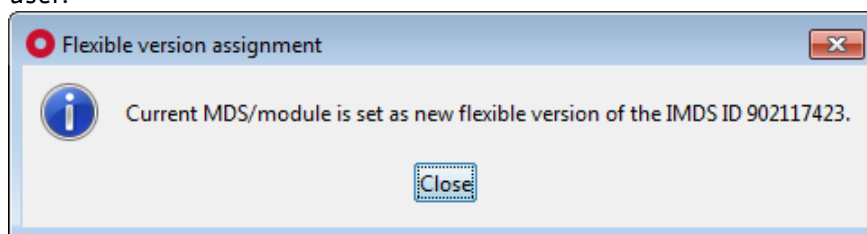


Figure 46 Notification about setting opened MDS/module as a flexible version

- If an own MDS/module in “**Edit**” mode, which is already set as a flexible version, is opened, the label of this button is “**Remove flexible version**” and the icon is .

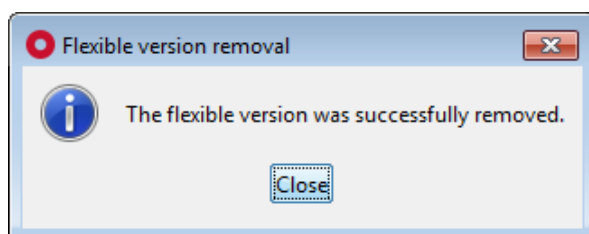


Figure 47 Notification about removal of the flexible version from opened MDS/module

- If an own MDS/module in “**Internally released**” mode or received or published MDS is opened, the icon is  and it cannot be clicked.
- **Replacing old versions** 

If there are newer versions of an MDS/module available in the tree structure, these will be shown using a special symbol (, , ). These can be replaced individually by selecting the respective icon in the tree. A dialogue box will open displaying the newer versions available for this MDS/module. Select the required version, then select “Replace”

When using the , functional MDS/modules in the tree structure will be checked, if there is a newer version available.

A dialogue box with all available newer versions will open.

Note: If you attempt to replace an “old” versions of MDS/modules in the structure, but the MDS cannot be edited (e.g. it is internally released in IMDS), you will get the message “No data found”.

	Name	IMDS-ID	Old Part No.	New Part No.	Part No. changed	New version	Status	Path	Result
349		/ 1.00	1000002	1000006	Yes	4.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
350		/ 1.00	1000002	1000009	Yes	5.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
351		/ 1.00	1000002	1000005	Yes	6.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
352		/ 1.00	1000001	1000001	Yes	2.00	accepted	[MDS/Module Name]	
353		/ 1.00	1000001	1000001	Yes	3.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
354		/ 1.00	1000001	1000009	Yes	4.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
355		/ 1.00	1000001	1000002	Yes	5.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
356		/ 1.00	1000001	1000008	Yes	6.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
357		/ 1.00	1000002	1000002	Yes	2.00	accepted	[MDS/Module Name]	
358		/ 1.00	1000002	1000000	Yes	3.00 ([MDS/Module Name])	cancelled by sender	[MDS/Module Name]	
359		/ 1.00	1000002	1000000	Yes	4.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
360		/ 1.00	1000002	1000003	Yes	5.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
361		/ 1.00	1000002	1000009	Yes	6.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
362		/ 1.00	1000008	1000008	Yes	2.00	accepted	[MDS/Module Name]	
363		/ 1.00	1000008	1000005	Yes	4.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
364		/ 1.00	1000008	1000005	Yes	5.00 ([MDS/Module Name])	cancelled by sender	[MDS/Module Name]	
365		/ 1.00	1000008	1000005	Yes	6.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
366		/ 1.00	1000008	1000006	Yes	7.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	
367		/ 1.00	1000007	1000007	Yes	2.00	accepted	[MDS/Module Name]	
368		/ 1.00	1000007	1000004	Yes	4.00 ([MDS/Module Name])	accepted	[MDS/Module Name]	

Replace selected in current version Close

Figure 48 Screen to select newer versions of referenced MDS/modules

Note: If the name of the newer version is different to the original MDS/module, the new name is shown in the column “New Version(s)” in brackets behind the version.

Attention: MDS/modules with the version ID 999.xx will not be displayed in the list as they

- may be made from older versions
- may be unchecked and therefore may contain errors.

After (multi)selecting the required versions, the “old” versions will be replaced by the selected new ones, when you select “Replace”. The resultant replacements will be displayed in the list. To finish the process, select “Close”. If there were any replacements, the detail view will be refreshed.

- **Tree structure**

The tree structure can consist of many smaller nested tree structures for each of the respective MDS/modules, Components, Semicomponents, or Materials. Each structure will have its own hierarchy and associated elements.

- **Expand tree**

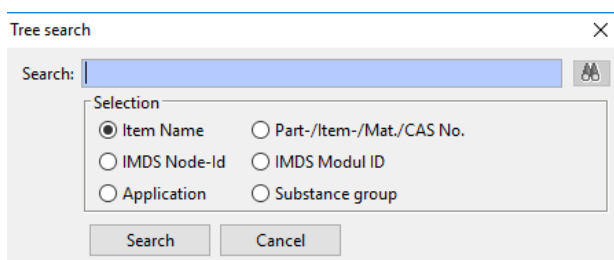
The tree or portions of the tree will expand from the selected node. To expand the entire tree, the top-level node must be selected. Using the menu option “Options – Tree functions” you can define if a substance should be shown, and how many levels of the tree structure should be opened.

- **Collapse tree**

The tree structure will be collapsed, from the selected node. If the top-level node is selected, the entire tree will be collapsed. If a single node is selected, and is within its own expanded tree structure, only the selected nested tree will be collapsed. If more of the tree is to be collapsed, you must select a node outside of this structure to collapse it further.

- **Search in tree**

If you select this icon the following dialogue box will appear:



The dialog box titled "Tree search" contains a search input field with a magnifying glass icon. Below the input field is a "Selection" section with six radio button options: "Item Name" (selected), "Part-/Item-/Mat./CAS No.", "IMDS Node-Id", "IMDS Modul ID", "Application", and "Substance group". At the bottom are "Search" and "Cancel" buttons.

Figure 49 Search in the tree structure

It is possible to search for:

- Item Name (the search uses both English and German names)
- Part-/Item-/Material/CAS Number
- IMDS Node-Id
- IMDS Module ID
- Application code (possible only if the parent MDS node is selected)
- Substance group

Add a string to the “search field” (e.g. Part no, IMDS Node-Id etc....)

Using the "Search" button, you can search the tree structure for a selected input. Wildcards (*) can be used in your string.

If your search is successful, you will automatically be directed to the node in the tree structure.

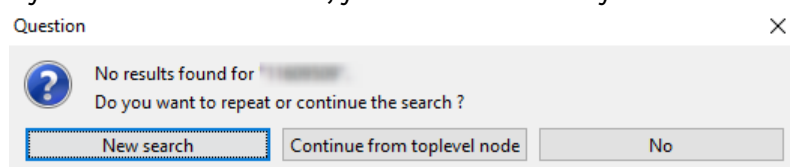


Figure 50 Tree search

Note: If your search returns "No results" you will be presented with options.

If your search reaches the end of the tree structure and finds no match, a message appears, and the user has to decide if the search should enter a New search or restarted from the top level node.

Using the  icon, the search can be continued with the same search criteria for the next occurrence.

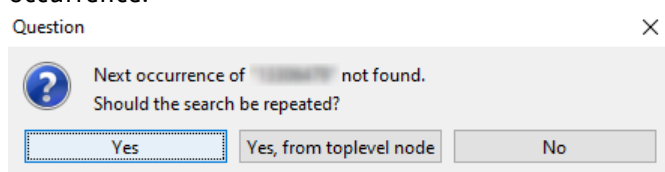


Figure 51 Tree search continued

If your search is successful, you will automatically be directed to the node in the tree structure.

This can be repeated for each occurrence by selecting .

Note: If your search returns "No results" you will be presented with options.

If your search reaches the end of the tree structure and finds no occurrence, a message appears, and the user has to decide if the search should be repeated or restarted from the top-level node.

- **Search next in tree**

See "Search in tree"

- **Refresh tree**

The complete tree will be reloaded. This is necessary when another user has modified the MDS/module or when a sub-node has been edited.

- **Recommendations check**

The tree structure will be checked against the IMDS Recommendations. The recommendations will be checked with the parameters as defined for the check configuration "**SCM/USC Inbox Check**".

Using the menu "**Options → Checks → Checks in use – Recommendation Check**" this will display the check in use, you have the option to toggle the options, to use the checks of the IMDS Recommendations if required.

Details regarding the checks can be found in the extra documentation.

- **Analysis**

The window for the detailed analysis will open

- **Print Report**

The Print Report will open, this can be exported. This function is only available for the top-level node. The user must have the permission “**MDS_PRINT**”.

- **Delete a node**

Select an item in the tree structure, using this “**Cut**” function, the item will be removed from the structure following your confirmation in a pop-up message.

If the item is a MDS/module, only the reference will be deleted, the data record itself will still be available in your local database.

If the selected node is a ‘simple node’ that has further sub nodes, the user can choose between

- Deletion of the complete sub tree, including the selected node. In this case only the references will be removed, if the affected node is a MDS/module. Simple nodes however will be deleted from the database.
- deletion of only the selected node. In this case the selected node will be deleted, and the sub nodes will be moved up the tree a level. The associated values for the amounts, percentages, recycle values, and application codes will be unchanged, in other cases they will be reset to 0 or will be deleted.

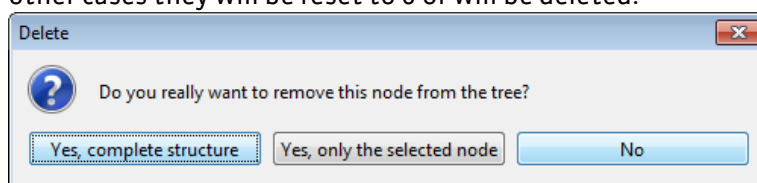


Figure 52 Dialog for deletion of selected simple node from the MDS tree

If the same sub node, exists at the current tree level, the function is not possible, because duplicated nodes are not allowed on the same level. An error message appears, and the user has to delete one of the nodes first.

A ‘simple node’ without any sub nodes will be deleted from the database.

If the selected node to be deleted is a missing position and the module “**SPM**” is licensed by your company, following process is followed:

- on deletion of a node without subtree, an additional button, asking if the referenced SPM request should also be deleted, is displayed in the delete dialog. When the user selects “**Yes, and referenced SPM request, too**” the system searches for the associated SPM request that belongs to the Part / IHS item number. If this SPM request is not referenced in any other missing positions, of other MDS/modules, and the request is in a state that is not yet sent, then the SPM request will be deleted also.

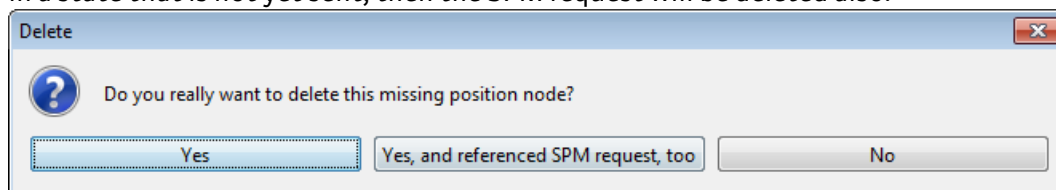


Figure 53 Dialog for deletion of missing position without subtree

- on deletion of a simple node containing missing positions, another dialog is shown.

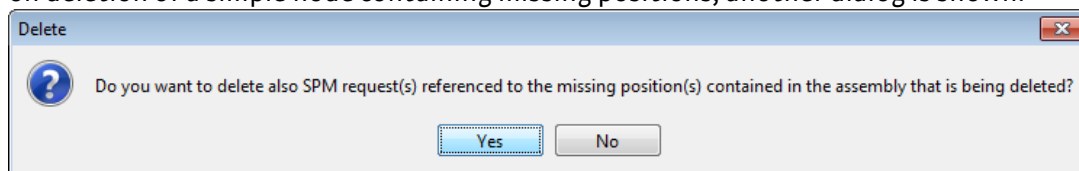


Figure 54 Dialog for deletion of simple node containing missing position(s)

- **Activate/Show RRR (optional)** 

The RRR and LCA functions will be enabled (if available).
For a more detailed description please refer to Chapter 34
- **Export of the MDS/module (optional)** 

The actual MDS/module can be exported in a given format (like “Jama/Japia”)
For a more detailed description please refer to the related documentation.

9.3.2 Functions from the context menu

- **Edit**

With this function it is possible to load and edit a referenced MDS/module.
The MDS/module will be loaded as the top-level node in a new window.
This is also possible with double clicking on a selected MDS/module node.
- **Restructure node**

If the tree structure contains several structure types on the same tree level.
If the node is selected, the structure of this selected node can be modified to the recommended tree structure of Recommendation 001 (Not possible for Flat bill MDS's).
This function is found in the context menu (clicking the right mouse button)

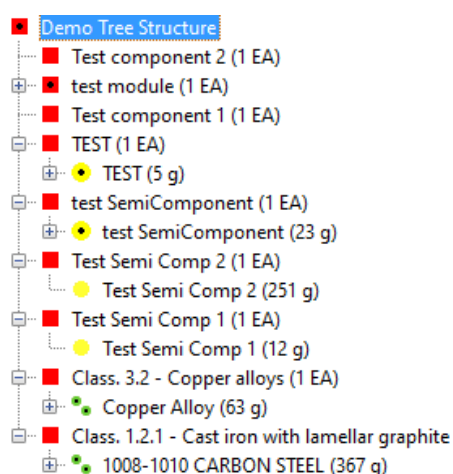


Figure 55 Restructuring a tree

Within the editable tree paths, a new simple node for each semi component and material will be created. The respective nodes will be moved and housed as sub trees under the new nodes. The newly created “pseudo components” will inherit their names from the semi components nested below. For materials, the new “pseudo component” name represents the material classification (e.g. “Class. 3.2 – Copper alloys”).

- **Copy path up to the selected node**

The path from the root node to the selected node (including this node) is copied to the clipboard.

- **New Version of an MDS/module...**

If the new version is created for top level node, new panel for MDS/module editing is opened.

If the new version is created for lower level from the MDS/module tree, below dialog is shown, asking if the selected node should be replaced by the new version.

By click on the “**Yes**” button, the new version of the MDS/module, that is created, will automatically replace the selected node in the tree. By click on the “**No**” button newly created version of the MDS/module will be loaded into a separate window for editing.

By click on the “**Cancel**” button, the creation of the new version is aborted.

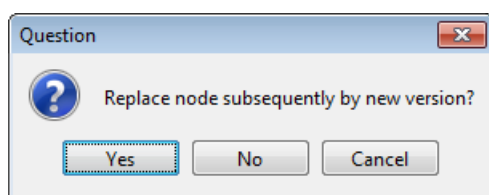


Figure 56 Dialog shown on creation of new version of the MDS/module from the lower levels of MDS tree

The “**New Version of an MDS/module**” option is enabled only if below conditions are met:

- exactly one MDS/module is selected
- MDS/module has IMDS ID
- MDS/module belongs to the own company
- Organisation unit to which the selected MDS/module is assigned to matches with the organisation unit to which the user is assigned to (this condition is not considered if the user has permission “**ADMIN_MDB**” granted)
- Type of the selected MDS/module (component/semicomponent/material) matches with the permission for creation of new version granted to the user
 - NEW_VERSION_COMPONENT (allows to create new version of component)
 - NEW_VERSION_SEMICOOMPONENT (allows to create new version of semicomponent)
 - NEW_VERSION_MATERIAL (allows to create new version of material)

For more information regarding the functionality for “**New version**” please refer to **chapter 7.4.4**.

- **Copy MDS/module...**

This option is active, only if the selected node in the tree structure is a referenced MDS/module, or it is the top-level node of the tree. A copy of the selected MDS/module will be created and loaded into a new window for editing.

For more information about the functionality of “Copy” please refer to **chapter 7.4.4**.

- **Forward MDS...**

This option is active only if the selected node in the tree structure is a referenced “Received MDS”. The “Received MDS” must have the option “Forwarding Allowed” pre-set by the supplier of the original MDS. If forwarding is not allowed, you will receive the below message.

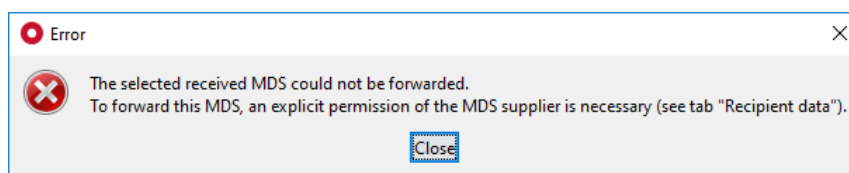


Figure 57 Forwarding error message

This special function is a copy of the selected MDS with the relationship between the original MDS and the one to be forwarded maintained. A copy will be created and loaded into a new window. If a forwarded version has already been created you will receive the below message.

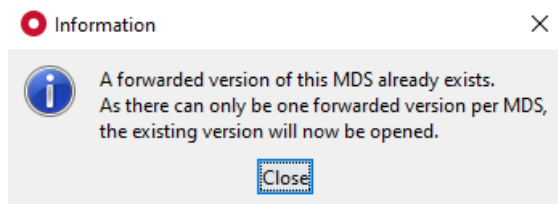


Figure 58 Forwarding not allowed

For more information regarding the functionality for “**Forward**” please refer to chapter 7.4.4.

- **Replace (with) MDS/module/basic substance...**

Depending on the selected node, different dialogue boxes will open. If an MDS/module is to be replaced by another MDS/module or a simple node is to be replaced by MDS/module a dialog box will open. In this window the user can search for the required MDS/modules, following the search, selecting the MDS/module, and then select “Apply” The selected MDS/module will replace the node within the tree structure at the same tree position.

For the basic substances option, this is only applicable to materials. If an IMDS substitution substance exists, they will be displayed automatically in a new window. If no substitution substances exist, a new window will open allowing you to search for a replacement.

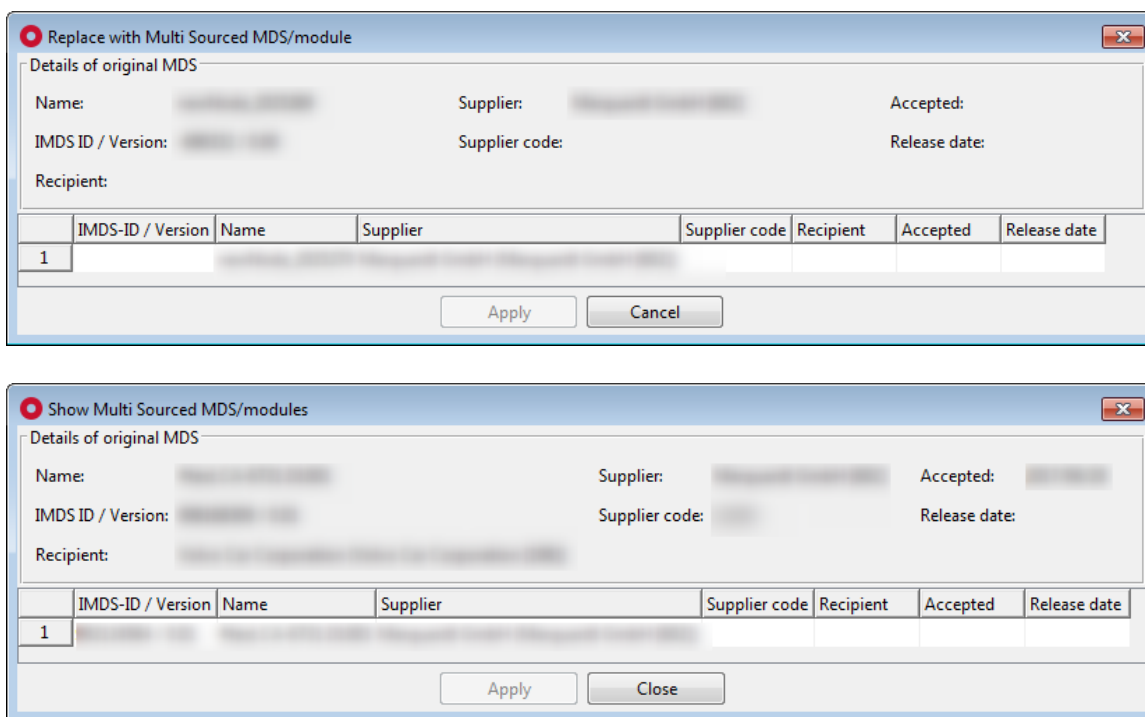
- **Replace missing position...**

If the selected node is a missing position, the system will search for a matching internal part number to process, before displaying the search window. If a matching dataset is found, it will be displayed in a new window. If more than one is found, they will all be displayed with a sorting order of the newest accepted received MDS on top, and the newest own MDS/module that is internally released below. The user can also perform a search to replace the missing position using other search criteria.

- **Show/replace multi sourced MDS/modules ... (optional) ⓘ**

This icon represents that there is a part-/item/material number with more than one MDS/module available for the same (component, semicomponent, material) type, either from a different supplier, or from one company that has reported the same part with different IMDS ID's. This

function is used to show the list of available MDS/modules. If you want to replace the current MDS/module, select them from the available options and click on the "Apply" button.



Replace with Multi Sourced MDS/module

Details of original MDS

Name: Supplier: Accepted:

IMDS ID / Version: Supplier code: Release date:

Recipient:

	IMDS-ID / Version	Name	Supplier	Supplier code	Recipient	Accepted	Release date
1							

Apply Cancel

Show Multi Sourced MDS/modules

Details of original MDS

Name: Supplier: Accepted:

IMDS ID / Version: Supplier code: Release date:

Recipient:

	IMDS-ID / Version	Name	Supplier	Supplier code	Recipient	Accepted	Release date
1							

Apply Close

Figure 59 List of multisourced MDS/modules to show/replace

- **Create SPM Request (optional)**

If the SPM Module is licensed, then using the context menu (clicking the right mouse button) on a node of a received external MDS, or of a missing position, allows the option to create a SPM request directly.

The edit window for the SPM requests opens; the system tries to populate the following fields in the request according to the selected node's data.

- Part-/Item-/Material No
- Name
- Type (Component/Semicomponent/Material)
- Supplier
- Contact person

The generated e-mail text will contain this information.

By selecting "**Save**" a new request will be created, and the edit window will be closed.

- **Show SPM Requests (optional)**

If the SPM Module is licensed, then using the context menu (clicking the right mouse button) on a node (except for a missing position), allows the option to see SPM requests directly.

The search panel for the SPM requests opens; the systems automatically searches for SPM requests having matching part number and displays them.

- **Add to Blacklist (Only current node)... (optional)**

The Part-/Item-/Mat-Number of the selected MDS/Module will be added to the “Blacklist” as a record of type “Only current node”.

If the selected MDS/Module is editable, a dialogue box will open asking if the node should be removed from the tree.

For further details see chapter 27 “Blacklist (optional)”.

- **Add to Blacklist (Complete structure)... (optional)**

The Part-/Item-/Mat-Number of the selected MDS/Module will be added to the “Blacklist” as a record of type “Complete structure”.

If the selected MDS/Module is editable, a dialogue box will open asking question if the node should be removed from the tree. For further details see chapter 27 “Blacklist (optional)”.

For further details see chapter 27 “Blacklist (optional)”.

- **Tree View**

Allows to display additional node data in the datasheet tree view.

Upon click on this option a list with individual options will open:

- **Mark missing positions with open received MDS**

Upon click on the button, all nodes of type missing position with open received MDS having matching part number are enriched with a symbol  that is added to the right from the node description.

PLEASE NOTE: In order to display existence of an open received MDS for newly added missing position, the currently edited datasheet needs to be reloaded or refreshed.

- **Show open SPM requests**

Upon click on the button, all relevant nodes of defined type (for more details see description of the configuration parameter “**MDS_SPM_OPEN_REQUEST_CHECK**” in **chapter 33.3**) with open SPM request having matching part number are enriched with a symbol  that is added to the right from the node description.

PLEASE NOTE: In order to display existence of an open SPM request for newly added node, the currently edited datasheet needs to be reloaded or refreshed.

9.3.3 IMDS Upload Options

This function is to send the MDS/module to the Online IMDS system.

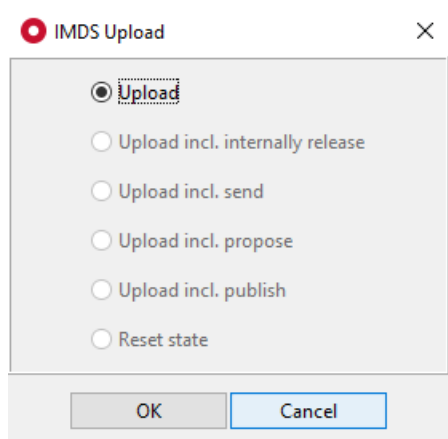


Figure 60 IMDS upload

The following options are available:

- Upload**
 Select the MDS/module to be uploaded. The upload status will be set when the button “OK” is selected.
 If the MDS/module was created new within the In-house system, an IMDS ID with the version 0.01 will be set by the Online IMDS system. This will be set following the successful upload.
 If the IMDS status is set to “edit”
 This option is mainly used for incomplete MDS/modules, where an IMDS ID is required (e.g. for a PPAP) or when deleting a MDS/module, or recipient, in the Online IMDS system.
Note: If uploading a MDS/module in this state, only the root node will be uploaded. No information regarding the structure will be uploaded.
- Upload incl. internally release**
 If a MDS/module is complete and correct, it can be uploaded and “internally released” in the Online IMDS system. Only internally released MDS/modules can be referenced in other MDS/modules, and can be sent to other companies or it can be published.
 When selecting “OK”, the upload status will be set.
 If the MDS/module was created new in the In-house System, it will be created new in the Online IMDS system. It will receive a new IMDS-ID with a version of (1.00) and will then be internally released following the successful upload. A MDS/module with an IMDS status cannot be edited in either system.
- Upload incl. send**
 This option is only available for MDS's. The MDS must be new, or must have the IMDS status of “edit” and must have only one recipient, otherwise an error message will occur. If the MDS is created new in the In-house system, it will be created new in the Online IMDS system and will get a new IMDS-ID and version (1.00).

- **Upload incl. propose**

This option is only available for MDS's. The function is similar to "Upload incl. send", except the MDS will be internally released within the process. This function supports more than one recipient. The MDS will be proposed to all recipients, with the status "new in IHS" or "edit". If an MDS has more than one recipient, only the propose option is valid. If the MDS is created new in the In-house system, it will be created new in the Online IMDS system and will get a new IMDS-ID and version (???).

- **Upload incl. publish**

Only MDS can be published. This option is restricted to a special user privilege, "IMDS_UPLOAD_PUBLISH". In addition, a confirmation is required before the system will publish the MDS. If the MDS is created new in the In-house system, it will be created new in the Online IMDS system and will get a new IMDS-ID and version (???).

Attention: A published MDS is visible to all companies and all users of the Online IMDS system. Everyone can see your MDS information and reference it within their own MDS/modules.

There is no way to delete a published MDS, if it has been sent or proposed and accepted by at least one recipient.

- **Reset state**

The upload state will be reset. This is only valid until the upload background process has started.

Attention: A prerequisite for "Upload incl. internally release", "Upload incl. send", "Upload incl. propose" and "publish" is the status of "ready" (🚚). The upload state cannot be set; if a referenced MDS/module within the tree structure is not set to "ready" or "internally released". The recipient data will be checked, as it may have changed, even if the MDS is already internally released, to be able to send to other recipients.

If there are referenced MDS/modules with status "ready", but are not "internally released", they will be included in the upload and set to "internally released" in the Online IMDS system.

A background process on the server will upload at regular intervals for all MDS/modules marked for upload. When the uploads have been processed, the system will update their status with their respective IMDS IDs and versions.

PLEASE NOTE: Since IMDS Release 9, materials containing GADSL or REACH-SVHC substances, that are flagged as confidential cannot be sent or referenced anymore. This is because those substances must now be disclosed. Due to restrictions in the download files, generated by the Online IMDS system, that are then downloaded to iPCA – no full disclosure with substances marked as confidential – it is not possible to identify an error before referencing or uploading the received or published material, if it was created prior to IMDS Release 9 that contain substances marked as confidential that were later added to the GADSL or REACH-SVHC lists. Due to this reason, an upload error may occur in the Online IMDS system preventing the MDS/module from being uploaded.

Additionally, the upload error may also occur in the case of the use of a published or received material containing a substance that is marked as confidential, that has been deactivated in the meantime. The reason is the same as for the previous case - no full disclosure of substances marked as confidential, are identified in the download files generated by the Online IMDS system.

The following information can be administered:

- **Internal No:**

If there is no internal number defined yet for the MDS/module, you can enter the internal no. here. When selecting resume, the internal no. will be stored for this MDS/module.

From then on, you can find this MDS/module using your internal number. Thereby such an accepted or public MDS will be available for the automated allocation, if it's from a SAP bill of material, a special material-ID will be searched and inserted.

If the internal number is already defined (this means it was already inserted manually at least once, or it is an own MDS/module), the edit field is read-only, the internal number will be displayed.

- **SAP-Pos-No.**

The entry field, SAP-Pos-No is only visible, if the ERP/PDM interface is specified.

If a component is to be created position after position, you can enter the SAP position-no. mentioned in the SAP bill of material here.

If a SAP bill of material exists for the parent node, and if the entered internal no. is part of this bill of material, the SAP position no. will be read out of this SAP bill of material, and the field will be initialized with this position no.

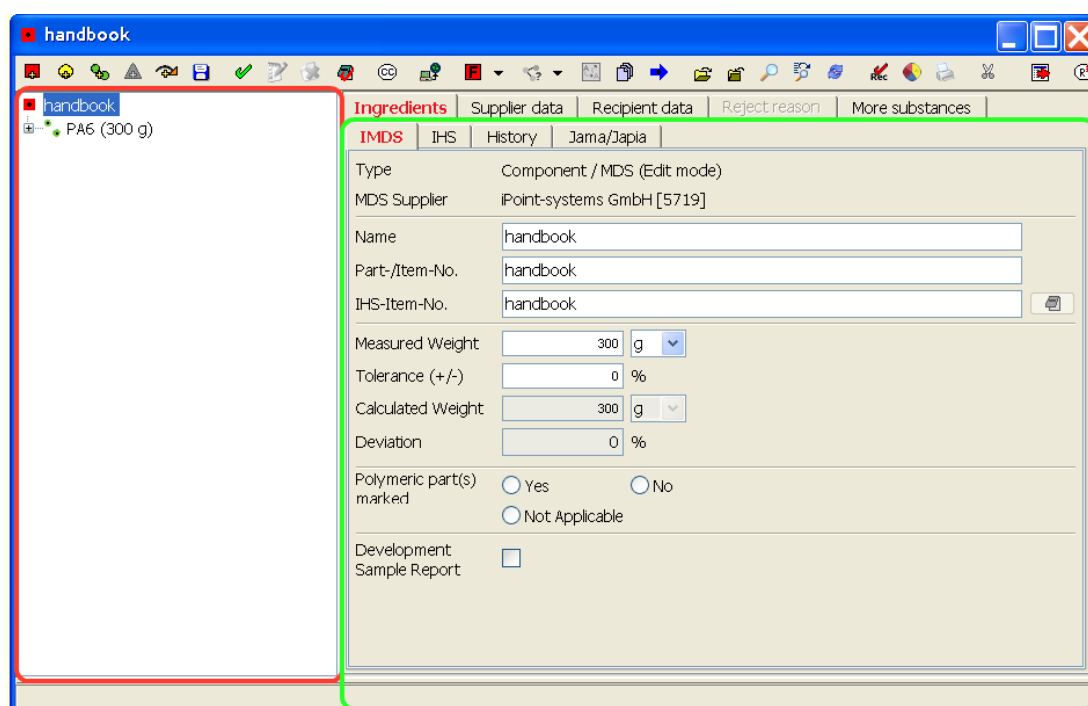
- **Adding like BOM:**

When selecting this option, all missing nodes (from ERP/PDM transfers) will be checked for this number. If a number of a missing node is identical to the specified internal no., this module will be put in place of the missing nodes. This will complete all incomplete bills of material node by node automatically.

9.4 Ingredients

The screen to display the ingredients is divided into 2 sections:

- **View of the tree structure (red part)**
See chapter 9.4.1 "Tree structure view".
- **Detail information (green part)**
See chapter 9.4.2 "Detailed Information".



The screenshot shows the 'handbook' application window. The left pane (red outline) displays a tree structure with a node 'PA6 (300 g)'. The right pane (green outline) is the 'Ingredients' tab, showing a form for editing a component. The form includes fields for Name, Part-/Item-No., IHS-Item-No., Measured Weight (300 g), Tolerance (+/-) (0 %), Calculated Weight (300 g), Deviation (0 %), and checkboxes for 'Polymeric part(s) marked' (Yes/No/Not Applicable) and 'Development Sample Report'.

Figure 61 Editing ingredients

9.4.1 Tree structure view

The tree structure of the MDS/Module is displayed here.

For each node the following information is displayed:

- Name
- Quantity (parts)
- Weight (semicomponents and materials)
- Weight values (semicomponents, materials and basic substances)

Selecting a node with the mouse you will get a detailed view relating to the node.

Selecting the icon  the structure of the node will be expanded.

Selecting the icon  the structure of the node will be collapsed.

PLEASE NOTE: From IMDS Release 12 on, the English material names are always displayed.

PLEASE NOTE: By double-click on an MDS/Module it will be opened in a new window.

9.4.2 Detailed Information

9.4.2.1 Structure

The details view is divided into multiple areas:



Figure 62 Structure of Detail view

- **IMDS**
Contains all the information that is also available in the external Online IMDS system with the addition of the IHS number if applicable.
Please refer to chapter 9.4.2.2 “General” to 9.4.2.4 “Weight and quantity”
- **IHS**
For additional information regarding the MDS/module.
Please refer to chapter 9.4.2.5 “IHS Information”.
- **History**
For additional information regarding previous uploads of an MDS/module.
Please refer to chapter 9.4.2.6 “History”.
- **Compliance Applications**
Mapping of IHS Applications to components.
For additional information, please refer to separate CSI user manual.
- **Jama/Japia (optional)**
More information about this can be found in the Jama/Japia user manual.
- **Documentation**
The mapping of documents to this MDS, and the sending of e-mails related to this MDS.
Please refer to chapter 8.4.2.7 “Documentation”

9.4.2.2 General

For all node types the detailed view in the above part is the same:

Type	Component / MDS (internally released)	
ID/Version		IMDS Node-ID:
MDS Supplier		

Figure 63 Detail view, common part

The following information is available:

- **Type**
Node type (component, semicomponent and material)

- **ID/Version**
IMDS MDS/module-ID and version number (only MDS/Modules that are also available online)
In addition the related IMDS Node ID will be displayed.
- **MDS supplier**
The sending supplier company of the MDS
- **Status information**
Please refer to chapter 9.2 “Status symbols”.
- **IMDS date information**
For MDS/modules that are available in the Online IMDS system, alongside the IMDS Node ID there is an additional button  which can be used to display more date information from the Online IMDS system: create- check- and release-date. This information comes through the AI interface.

9.4.2.3 Names and Numbers, IHS Number

Directly below the common area, the name, Part-/Item number and the IHS-/Item number are displayed.

PLEASE NOTE: From IMDS Release 12, only English material name can be defined or is displayed for materials. In case the material itself is loaded and it was internally released prior IMDS Release 12, also German material name can be displayed, but is no longer displayed by default if iPCA is started in German language.

For components, semicomponents and materials an internal number (the IHS number) can be defined.

Name		
Part-/Item-No.		
IHS-Item-No.		

Figure 64 Name, Part number and IHS number

Independent of the MDS/module status, the IHS number can be added or modified.

If the MDS/Module is in “edit mode“, the number can be edited directly.

If the MDS/Module is not in the “edit mode“, the number can be edited by selecting the icon .

By selecting the save icon  all changes will be saved.

PLEASE NOTE: IHS-Item-No. can be edited only in case the user has a required permission assigned to his user profile. There is a permission for each type of the datasheet:

- “IHS_NUMBER_MATERIAL” for material
- “IHS_NUMBER_SEMICOMPONENT” for semicomponent
- “IHS_NUMBER_COMPONENT” for component
- “IHS_NUMBER_ARTICLE” for article
- “IHS_NUMBER_MIXTURE” for mixture

9.4.2.4 Weight and quantity

- **Weights**

Semi components and materials below a component must have a weight.

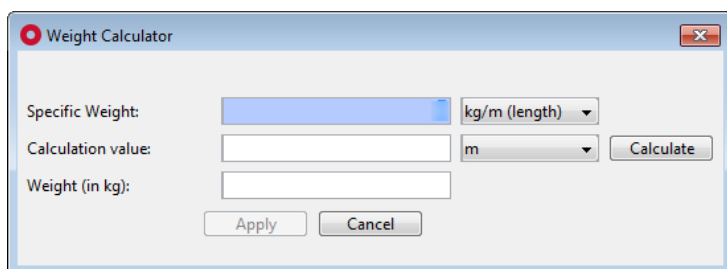
If a component is inserted into the tree structure, without weight, the weight of the sub-components has to be specified.

The sum of the calculated weights for all parts, semi components and materials must fit to the measured weight, or needs to be within the tolerance limits.

Note: When changing the weight factor, the original weight will be recalculated to a new one. If you have to change the weight or the weight factor, first you should change the weight factor, then the weight.

Additional note: If a tree load filter is set (see chapter 18.2) and a referenced MDS is loaded. The calculated weight is not visible.

For a semi component as the top level node, a specific weight and its dimension (length, area, volume) can be specified. If this semi component is used below a part, a dialogue box appears beside the weight field for calculating the weight. In this dialogue box the weight can be calculated from the given specific weight and a newly input value. By selecting the “Apply” button the result will be transferred to the semi component’s weight field.



The image shows a 'Weight Calculator' dialog box. It contains three input fields: 'Specific Weight' with a dropdown menu set to 'kg/m (length)', 'Calculation value' with a dropdown menu set to 'm', and 'Weight (in kg)' which is currently empty. There are 'Calculate', 'Apply', and 'Cancel' buttons.

Figure 65 Calculating the weight out of the specific weight

- **Percentages**

Below a semi component or a material the proportion of the used node type, has to be declared with a percentages. It is possible to enter a range “from – to”, or a fixed value for declaring the node as a “rest value”. The calculation takes place after each change of the percentage values, or after adding or deleting a node.

The sum of all the used node types below a specific node must add up to exactly 100%. Therefore, it is recommended to define one node with the “rest value” so that the automatic calculation results is always the required 100%.

- **Process Chemicals**

If a basic substance that belongs to the substance group “Process Chemicals” is added to a material and the percentage is (Greater than) > 0.1% Additional information is required regarding the specified substance (Intended use, Reaction residue, Impurity).

- **Confidential**

This checkbox is displayed only for a substance.

By checking this checkbox, the substance is marked as confidential, after the submission to the customer, it is shown to them as a “Confidential substances”, unless the customer is a trusted company.

PLEASE NOTE: This checkbox is disabled for jokers, for GADSL and/or SVHC’s relevant substances as well as substances with invalid CAS and EINECS numbers.

- **IHS comment**

An internal comment that has been added to the actual MDS/module.
This comment can be edited at any time.

9.4.2.5 IHS Information

The tab “IHS” is used to display all internal information, available only in the iPCA.

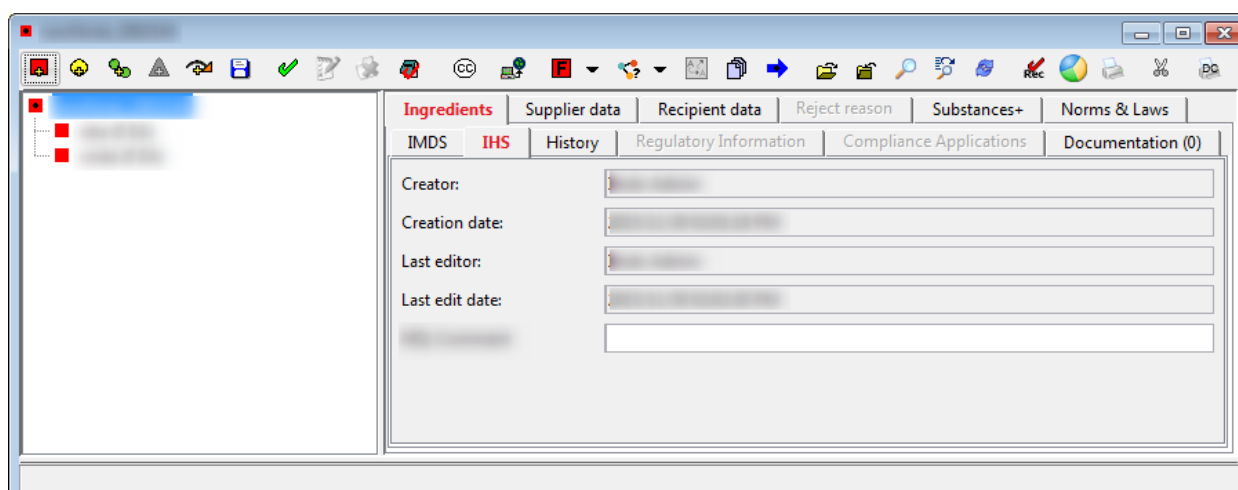


Figure 66 Detail view: IHS Information

The following information is available:

- **Creator**
Name of the creator of the MDS/module
PLEASE NOTE: MDS/Modules that were created by the IMDS Download or the PDM interface will have the name “system” as the creator.
- **Creation date**
Date and time the MDS/module was created.
- **Last editor**
The name of the user who performed the last change to the MDS/module.
- **Last edit date**
Date and time of the last change.
- **Region (optional)**
This field is displayed only if the regions and region types modules are licensed.

This allows to assign wished active region-region type to the MDS/module.
There could be 1..n region-region type records assigned.
In case the assigned region type got deactivated, it is displayed as strikethrough.

- **Customer specific fields**

If there are customer specific fields, they will be displayed here.

9.4.2.6 History

The tab “**History**” provides information on all uploads regarding the MDS/module, as soon as it has completed the upload to the Online IMDS system. When opening, the list it is empty. To see the complete upload history, the refresh button must be used.

For more information regarding IMDS upload results, refer to chapter 12.3 “IMDS Upload Result”.

IMDS

IHS

History

Regulatory Information

Compliance Applications

Documentation (0)

iMDS upload history

	Upload date (GMT)	Upload status	Transfer status	Error descr.	Upload file	Result	Cur. state
1		OK	upload				OK

Result

<?xml version="1.0" encoding="ISO-8859-1"?>
<Results ImportDate= ">
<Source_Element No="1" TopNode="Change" IMDS_ID= " LocalKeyDef= ">
<Change>
<Delete>
</Delete>
</Change>
<Summary Verdict="Success" IMDSModuleID= " Version= ">Datasheet/module
changed/Summary

Figure 67 Upload history

9.4.2.7 Documentation

In this tab “Documentation” it is possible to add related documents to this MDS/module (upper part of the window) The user can also send e-mails concerning the MDS/module (lower part).

The editing functions described above are only available for those users who have the user permission ADD_DOCUMENTS respective LM_MANAGE_DOCUMENTS (for the LCM edit window).

9.4.2.7.1 Documentation

In this tab the documents and emails can be managed for this MDS/module. In the tab name, there is a number representing the number of documents and emails added for the particular MDS/module. This tab is also available within editing an LCM and SPM request.

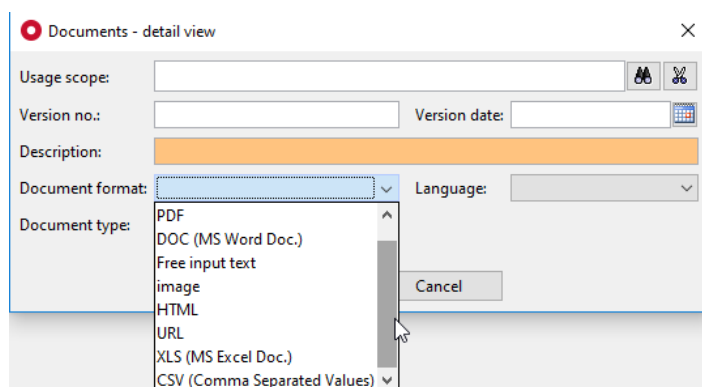
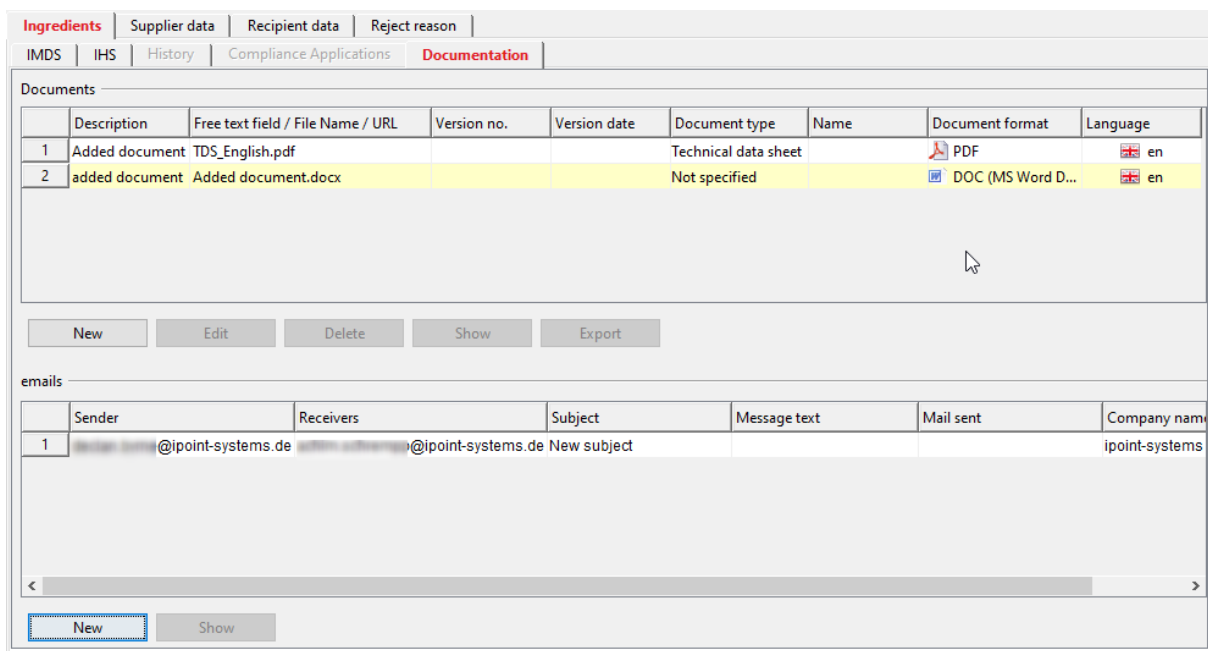


Figure 68 Adding documents

- **New**
Add a document with a short description. Define the document type. A version number and version date can be specified. Under “Usage scope” an organisation unit that the document relates too, can be specified.
Several different document types can be selected (e.g. doc, pdf etc.). It is possible to create a free text place holder, for this an additional comments field will be displayed.
- **Edit**
Modify data
- **Delete**
If a row has been selected, the mapping/relationship with the MDS to the selected document will be deleted, the document itself remains untouched.
- **Show**
The document will be opened with the respective program that is associated to the document type. This file extension mapping to the document type has to be done on the level of the operation system.
- **Export**
The document can be exported and saved on your local machine/network drive.



Ingredients | Supplier data | Recipient data | Reject reason

IMDS | IHS | History | Compliance Applications | **Documentation**

Documents

	Description	Free text field / File Name / URL	Version no.	Version date	Document type	Name	Document format	Language
1	Added document	TDS_English.pdf			Technical data sheet		PDF	en
2	added document	Added document.docx			Not specified		DOC (MS Word D...	en

New Edit Delete Show Export

emails

	Sender	Receivers	Subject	Message text	Mail sent	Company name
1	@ipoint-systems.de	@ipoint-systems.de	New subject			ipoint-systems

New Show

Figure 69 Tab documentation

9.4.2.7.2 E-mails

If e-mails are to be sent, regarding the MDS/module, this can be done directly in the IHS application in this window:

- **New**

A dialogue box will be opened, for you to enter the required information.

The sender (You) will automatically be populated with the user's e-mail address.

The receiver (To...), has to be selected from the available contacts held in the company/org-unit search.

The subject and the e-mail body are free text fields and are populated manually.

More options are available:

- Adding an attachment
- Adding a signature, this has to be pre-defined in the user's management data
- Inserting of the part number/part name of the MDS/module into the e-mail text
- Adding a document as attachment which is available in the document list above.

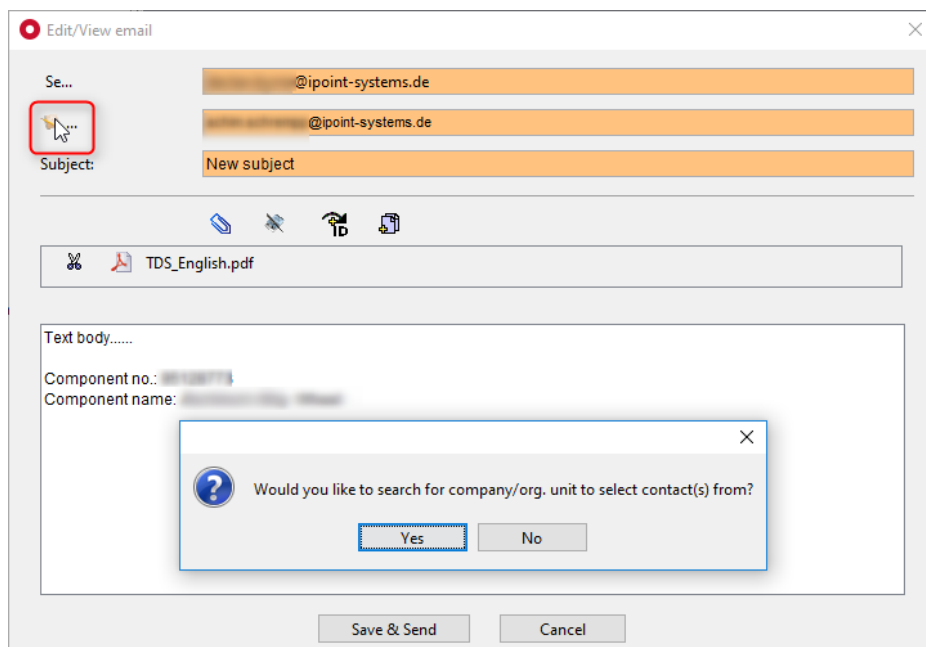


Figure 70 Create an e-mail

By selecting “Save & Send” the information will be saved, and the e-mail will be sent via a batch process.

- **Show**
This displays e-mails already sent.

9.4.2.8 Additional material information

Depending on the material category and the substances contained, it is necessary to edit and add additional information.

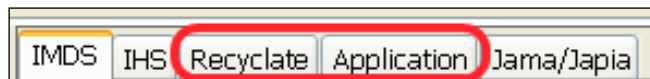


Figure 71 Access to additional material information

The functional background information for these extensions that were introduced in IMDS Release 3 (2005/06/23) will not be explained in this abstract. If you need more information about this, or the handling of Application Codes, please refer to the related documentation in the Online IMDS system.

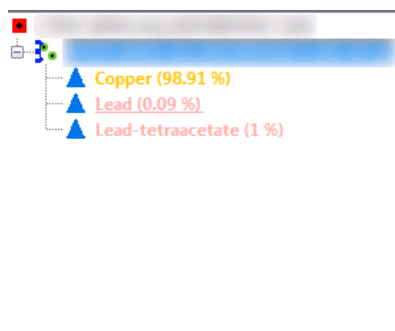
9.4.2.8.1 Applications

When adding an application code relevant material underneath a component (also with semi component in between), the tab “**Application**” will be enabled, otherwise this tab is inactive.

To enter the application codes, navigate to the tab and do required changes.

All application code relevant basic substances contained in the selected material are listed.

For newly added materials, in some cases the default application code is pre-selected (based on the substance-application relationship).



Ingredients		Supplier data	Recipient data	Reject reason	Product Volumes	Substances+	Norms & Laws
IMDS	IHS	History	Recyclate	Regulatory Information			
Application		Compliance Applications		Jama/Japia	Documentation (0)		
Component							
Material							
2 elements found.							
	Basic Substance	% (MAX)	Application [ID]				
1	Lead	0.09	Concentration within acceptable GADSL limits [44]				
2	Lead-tetraacetate	1	Other application (potentially prohibited) [20]				

Figure 72 Display basic substance application codes for materials

To select an application code for a basic substance, click on the name of the application code. Then the panel with all active application codes (inactive and hidden application codes are not displayed in this panel) for the selected substance will be displayed. Wished application code can be picked by selecting the relevant radio button and confirmed by the click on the “**Save**” button.

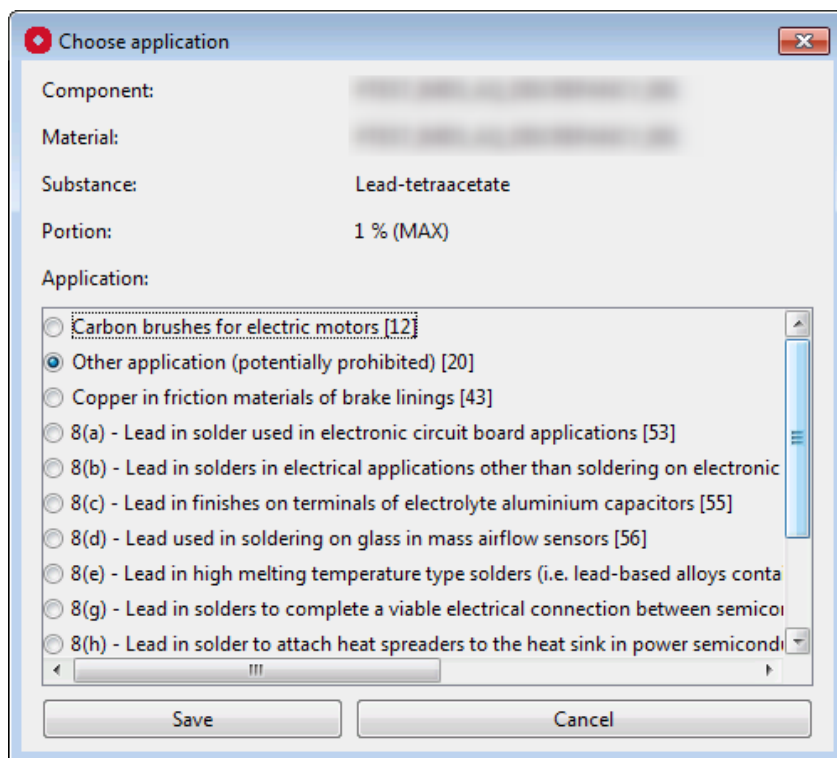


Figure 73 Handling application questions (AQ) for basic substances

All application code relevant substances in an own editable MDS/module must have an application code assigned, otherwise the MDS/module cannot be internally released or sent to a recipient. For substances without an application code set an error will be generated by the quality checker.

For components/parts that were internally released before IMDS Rel. 3 and contain material-basic substance combinations that require Application codes but do not contain any, the following applies:

If they are referenced in a new, own component node and

- if the referenced MDS/Module is an own component, then a new version of that MDS/Module is required. This is because the basic substance list with their respective application codes will be empty and cannot be edited;
- if the referenced MDS is a published or received MDS, with “None” displayed within the basic substance list, so long as the top-level component has not been sent to an OEM, the list is not editable. If the MDS has been sent to an OEM, (i.e. if an OEM has been added as recipient), the Application codes must be added by the supplier, therefore the application codes are now editable in the basic substance list. The Q-Checker notifies the user that additional AQ’s are required, as a warning message.

For published or received MDS in which no Application codes can be applied, that are opened at the top-level node, “None” is displayed within the basic substance list and the list is not editable.

If an MDS has been received by an OEM, the Application codes must have been added for the OEM by the supplier. If the MDS is opened at the top-level node, the added Application codes will be displayed, but it

is not possible to edit them. If the received MDS is copied and changed to an own MDS, only those Application codes will be applied to the new MDS that are not additionally added.

The application codes displayed in the “**Application**” panel have different colours depending on their status in IMDS online system:

- active application code: blue
- hidden application code: orange
- inactive application code: red

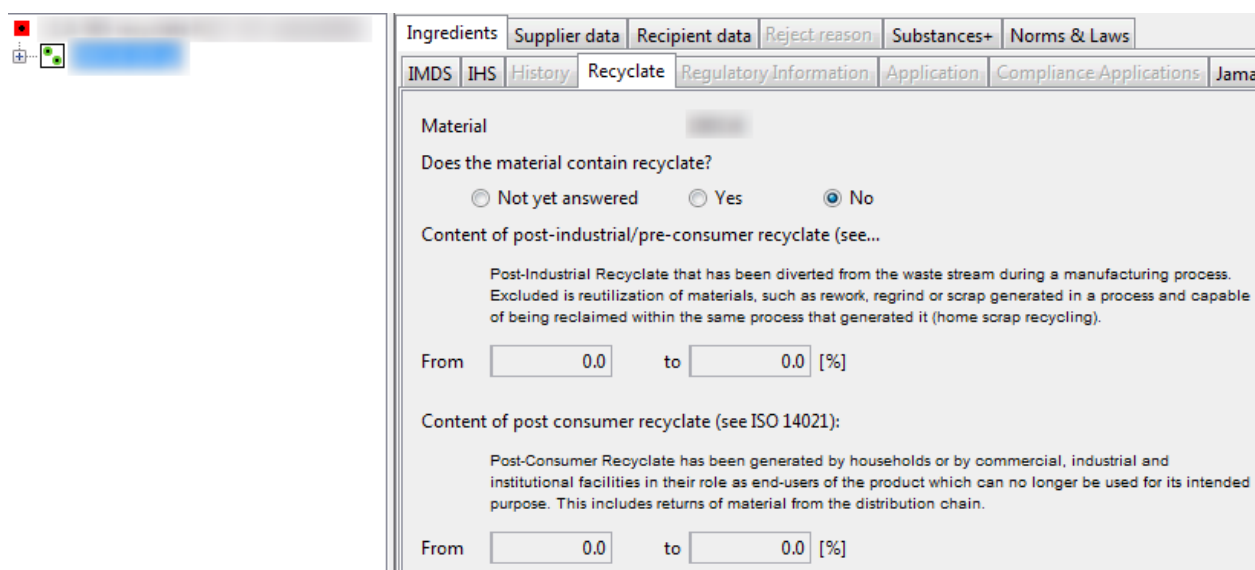
9.4.2.8.2 Recyclate

When adding a recyclate relevant material underneath a component or a semicomponent, the tab “**Recyclate**” will be enabled, otherwise this tab is inactive.

To enter the recyclate information, navigate to the tab and do required changes.

The default answer is “**Not yet answered**”.

To enter the recyclate values the radio button “**Yes**” needs to be selected. This will enable the fields for entering ranges of the recyclate.



Ingredients Supplier data Recipient data Reject reason Substances+ Norms & Laws

IMDS IHS History Recyclate Regulatory Information Application Compliance Applications Jama/

Material

Does the material contain recyclate?

☐ Not yet answered ☐ Yes ☒ No

Content of post-industrial/pre-consumer recyclate (see...)

Post-Industrial Recyclate that has been diverted from the waste stream during a manufacturing process. Excluded is reutilization of materials, such as rework, regrind or scrap generated in a process and capable of being reclaimed within the same process that generated it (home scrap recycling).

From to [%]

Content of post consumer recyclate (see ISO 14021):

Post-Consumer Recyclate has been generated by households or by commercial, industrial and institutional facilities in their role as end-users of the product which can no longer be used for its intended purpose. This includes returns of material from the distribution chain.

From to [%]

Figure 74 Handling recyclate information for materials

9.5 Supplier data

In this tab, the owning company and responsible contact person needs to be defined.

If the company has organizational structures, it can be stated here, which organizational unit is responsible for the MDS. This information will be visible in the IMDS online system and to the potential recipient of the MDS.

The contact can be defined manually or can be pre-set automatically. This is the case if the “Contact person” attribute is defined in the user profile of the iPCA user creating the MDS.

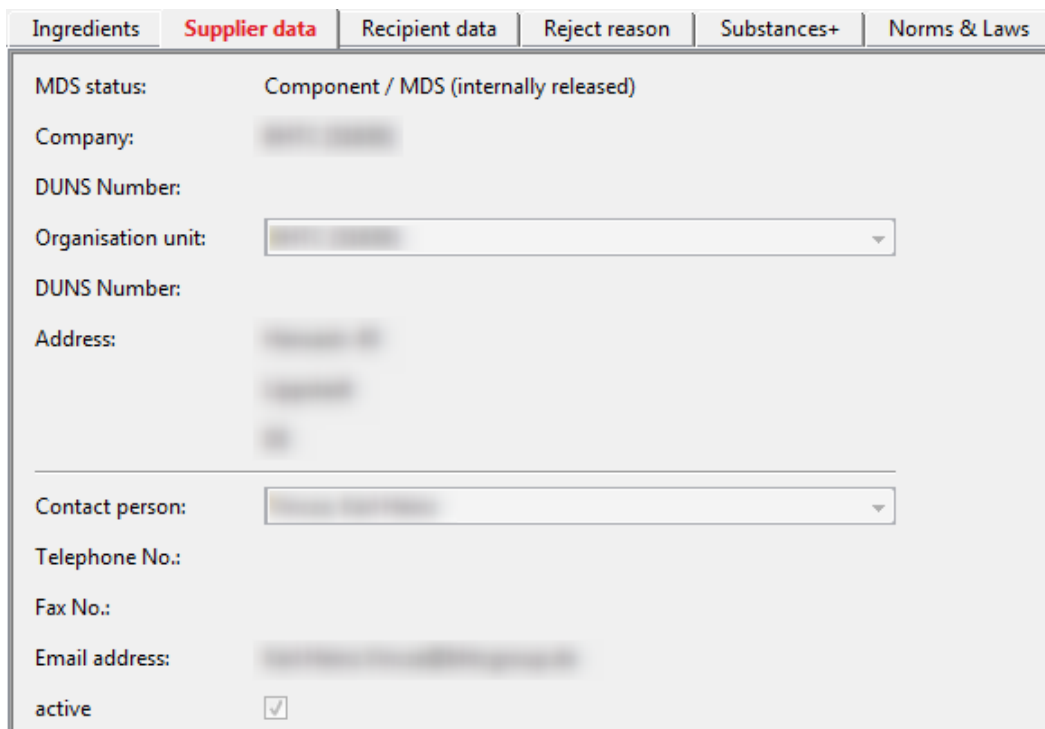


Figure 75 “Supplier data” tab

In case that the defined contact person is deleted or inactive, the little symbol is displayed that visualizes this fact.

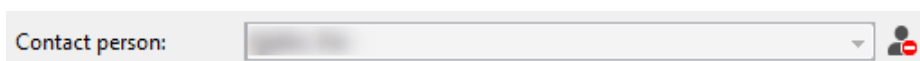


Figure 76 Visualisation of inactive/deleted contact person

9.6 Recipient data

A summary list with recipient data is displayed, where the MDS will be sent too. The associated detailed information is displayed in the lower part of the window.

If you are the supplier of the MDS, then all recipients of the MDS are visible here.

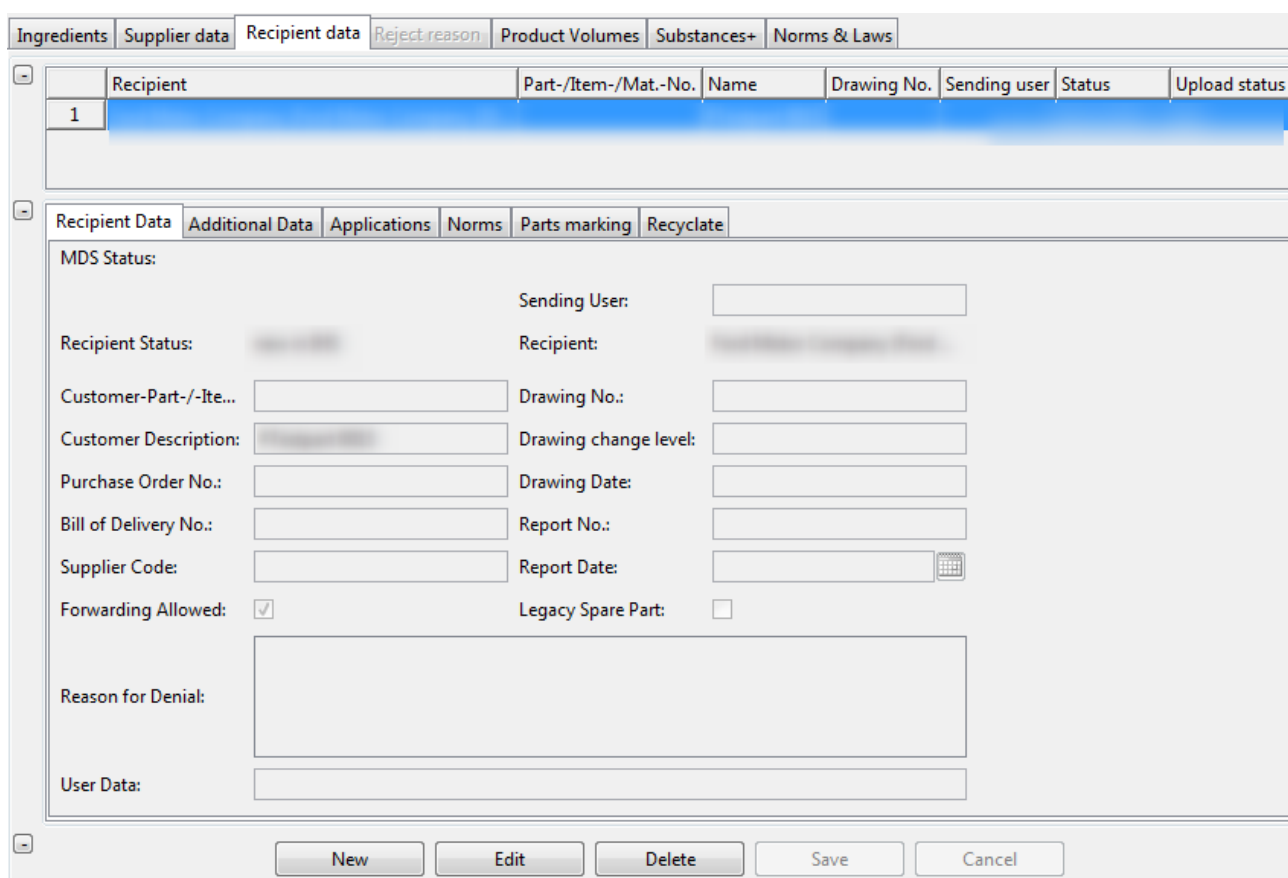
If you are the recipient of the MDS, you will see only your own customer information that was entered by the supplier. In this case the data cannot be edited.

PLEASE NOTE: Recipient data created in iPCA/LCM (marked with comment “recipient data according MDS request”) can only be edited in iPCA/LCM. If such an MDS is already loaded, and changes were made simultaneously in LCM, then the MDS has to be reloaded after the changes are made in LCM. This can be done by either closing the window – reload the MDS or clicking the button “Refresh Tree”.

PLEASE NOTE: If an MDS is in “handshake mode”, in other words the MDS was “sent” to the recipient, but has not yet been accepted or rejected and the recipient needs to be changed, this can be done in two steps:

- Delete the existing recipient and wait for the upload results
- Add a new recipient and send the MDS

This is needed as the result of the “delete” order cannot be ensured (maybe the MDS was accepted since the last daily download).



Recipient	Part-/Item-/Mat.-No.	Name	Drawing No.	Sending user	Status	Upload status
1						

Recipient Data | Additional Data | Applications | Norms | Parts marking | Recyclate

MDS Status:

Recipient Status: Sending User:

Customer-Part-/Item-...: Recipient:

Customer Description: Drawing No.:

Purchase Order No.: Drawing change level:

Bill of Delivery No.: Drawing Date:

Supplier Code: Report No.:

Forwarding Allowed: ☒ Report Date:

Legacy Spare Part: ☐

Reason for Denial:

User Data:

New Edit Delete Save Cancel

Figure 77 Maintaining recipient information

The list contains the following information:

- **Recipient**
Name of the organization unit of the recipient.
- **Part-/Item-/Mat.-No**
The recipient’s specific number.
- **Name**
The recipient’s specific name.

- **Drawing No.**
The recipient's specific drawing number.
- **Sending user**
The last user who initiated the sending of this recipient data.
- **State**
The state of the MDS at the recipient side (refer to chapter 4.3 "Statuses in the In-house System and in the ").
- **Upload status**
The current state of the recipient information:
 - **Modify**
The information regarding this recipient will be updated to the Online IMDS system with the next synchronization.
 - **Add**
This recipient will be added to the Online IMDS system with the next synchronization.
 - **Delete**
This recipient will be deleted in the Online IMDS system with the next synchronization.

The following actions are available:

- **New**
Add a new recipient
- **Edit**
Edit the current recipient
Note: This is only available if the recipient has no upload state, this means, this recipient is not in a current synchronization with the Online IMDS system.
- **Delete**
Delete the selected recipient. This is only available, when the recipient has one of the following states:
 - **New in IHS**
This recipient will be deleted immediately.
 - **Edit mode**
The upload state "delete" will be set. After successful upload to the online IMDS system, the state will change to "cancelled".
 - **Modified**
The upload state "delete" will be set. After successful upload to the online IMDS system, the state will change to "cancelled".
 - **Rejected**
The upload state "delete" will be set. After successful upload to the online IMDS system, the state will change to "cancelled".

- **Unread**
The upload state “delete” will be set. After successful upload to the online IMDS system, the state will change to “cancelled”.
- **Read**
The upload state “delete” will be set. After successful upload to the online IMDS system, the state will change to “cancelled”.
- **Save**
Save the changed data (only when adding or editing)
- **Cancel**
Cancel the addition of a new recipient or edit of existing recipient without saving the changes.

9.6.1 Recipient specific information

If there are recipients with specific information available, that can be sent via the interface (e. g. for certain customers DaimlerChrysler, Ford or Renault), this can be edited using the tab “additional data”. For recipients without specific data, this tab is disabled.

The content of the specific information is according the online system IMDS.

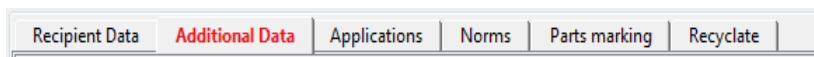


Figure 78 Tab “additional data” for specific recipients

9.6.2 Additional attributes for OEMs

With IMDS Release 9 (go-live on May 8th 2014), the following tabs were introduced with additional attributes for OEM’s. These will be displayed if the selected recipient is an OEM:

- Applications
- Norms
- Parts marking
- Recyclate

These tabs are activated only if the relevant information is available in the MDS.

PLEASE NOTE: By setting the value of the configuration parameter “**ENABLE_ADDITIONAL_OEMDATA**” in the user management to “FALSE”, the ability to edit additional attributes for OEMs will be disabled.

By default, this parameter is not created, this has the same behaviour, as if it was created and set to “TRUE”.

9.6.2.1 Description

The purpose of this is to allow a Tier-1 company supplying its MDS’s to OEMs, the ability to modify the following recipient specific data, listed below;

This data can be edited by selecting the “**Edit**” button in the “**Recipient data**” panel. For more information on the available options, please see **chapter 9.6.2.2**.

- **Applications**

In this tab, all application codes relevant to the substances present in all the materials, that are contained in the referenced and internally released MDSs/modules, that exist underneath the parent MDS are listed. This means that substances which do not have any application codes defined yet, are also listed.

The tier 1 supplier can define new application codes or overwrite existing application code values with other application codes that are available for this material-application combination as recipient specific data.

- **Norms**

In this tab, all materials (only one occurrence per IMDS ID/version) contained in referenced and internally released MDSs/modules that exist underneath the parent MDS are listed. This means that materials which do not have any norms defined yet, are also listed.

The tier 1 supplier can define new norms or overwrite existing norm values as recipient specific data.

If more than one norm for a material exists, these are comma-separated.

- **Parts marking**

In this tab, all parts marking relevant components, contained in referenced and internally released MDSs/modules that exist underneath the parent MDS are listed (simple nodes are not listed until the MDS has been uploaded to the online IMDS system). This means that components which do not have any value for parts marking defined yet, are also listed.

The tier 1 supplier can define new parts marking or overwrite existing parts marking values as recipient specific data.

- **Recyclate**

In this tab, all recyclate relevant materials (only one occurrence per IMDS ID/version) contained in referenced and internally released MDSs/modules that exist underneath the parent MDS are listed.

The tier 1 supplier can overwrite existing recyclate values as recipient specific data.

PLEASE NOTE: Editing of the data is available only when the recipient has no upload state, this means, the recipient is not in a current synchronization with the online IMDS system.

9.6.2.2 Functions

The following functions for working with data shown in the individual tabs exists:

- **Edit**

Edit a selected value in a particular active “additional attribute” tab. This can also be actioned by double clicking on the particular entry. A Pop-up window is opened, and the changes can be made. Changes will be implemented by click on the button “**Apply**” or cancelled by click on the button “**Cancel**”.

- **Reset data to its original values**

Reset all data in a particular active “additional attribute” tab to their default values. A Pop-up window is opened, and values can be reset by click on the button “**Yes**” or kept by click on the button “**No**”.

- **Apply changes to all OEM’s in the recipient list**

Copy all the data in a particular active “additional attribute” tab to other OEM’s that are added as recipients. A pop-up window is opened and the values can be copied by click on the button “**Yes**” or kept by click on the button “**No**”.

PLEASE NOTE: To save the results of the operations performed using the functions described above, the user must click on button “**Save**” in “**Recipient data**” panel.

9.6.2.3 Population and updating of records

The data in the “additional attribute” tabs for OEMs is populated for each OEM that is added in “**Recipient data**” panel on following actions:

- Loading of the MDS
- Refreshing of the MDS
- The addition of a new referenced or internally released MDS/module into the MDS
- The removal of an existing referenced or internally released MDS/module from the MDS

PLEASE NOTE: In cases of huge MDS’s, containing several thousands of nodes, the “additional attribute” tabs for OEM’s, may not be active immediately upon the load of the MDS, or following the change within the MDS. They will be active one by one, after the check and refresh of the data in the particular tab is finished.

9.7 Reject reason

When editing the reject reason, the tree structure view is still available. On this screen are the functions needed to process a received MDS.

The following actions are available:

- **Edit**
The edit field, reject reason will be opened for editing, the text can be changed.
- **Save**
The entered text will be saved
- **Cancel**
The edit mode will be aborted, no changes will be saved

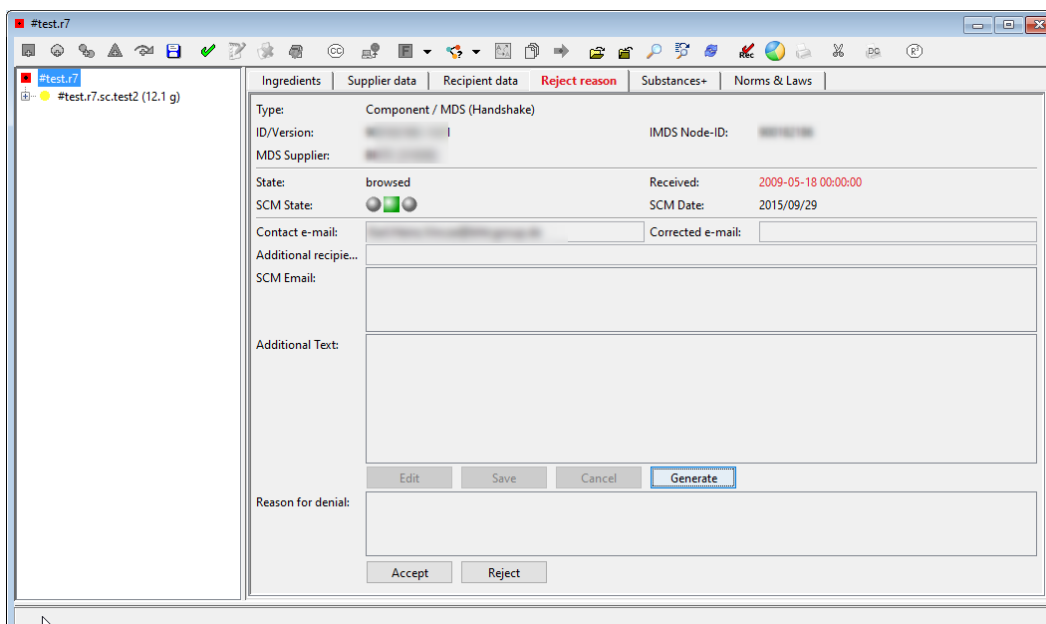
- **Generate**

(Re) populates the reason for denial with issues found by SCM/USC/AIC check and with to-do's flagged as error.

In case the SCM/USC/AIC check did not found any error but there is a need to reject the MDS, upon click on this button, a dialog is shown asking the user whether the standard reason for denial header should be inserted into the field.

- **Accept/reject**

The received MDS will be marked with an IHS decision status following confirmation – This status will be applied to the MDS in the next upload to the online IMDS system.



The screenshot shows a software window titled "#test.r7" with a menu bar and a toolbar. The main area is divided into a left sidebar and a right pane. The sidebar contains a tree view with a selected item "#test.r7.sc.test2 (12.1 g)". The right pane has a tabbed interface with tabs: "Ingredients", "Supplier data", "Recipient data", "Reject reason" (active), "Substances+", and "Norms & Laws". The "Reject reason" tab displays the following information:

- Type: Component / MDS (Handshake)
- ID/Version: [redacted] 1
- IMDS Node-ID: [redacted]
- MDS Supplier: [redacted]
- State: browsed
- Received: 2009-05-18 00:00:00
- SCM State: [three green circles]
- SCM Date: 2015/09/29
- Contact e-mail: [redacted]
- Corrected e-mail: [redacted]
- Additional recipie...: [redacted]
- SCM Email: [redacted]
- Additional Text: [redacted]

At the bottom of the right pane, there are buttons: "Edit", "Save", "Cancel", and "Generate" (highlighted with a blue border). Below these buttons is a text field labeled "Reason for denial:" and at the very bottom are "Accept" and "Reject" buttons.

Figure 79 Tab “reject reason”

PLEASE NOTE: The edit functions are controlled by the user privilege “SEARCH_INBOX” and “CHECK_MDB”.

10 Sent and Received

10.1 General

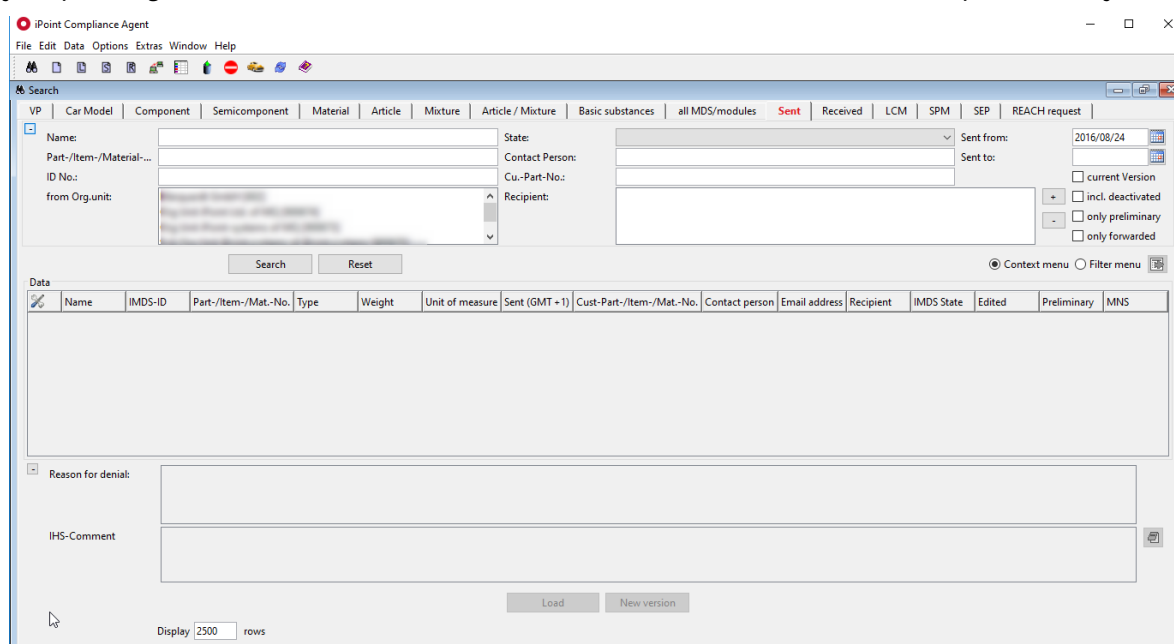
In IMDS Version 5 (2007/05/31) the transmission date is applied by the AI interface from CXD, only MDS's received later than this date will have the correct transmission date. For MDS's received earlier than this date, the transmission dates can vary, with the dates associated in the online IMDS system.

Note: To improve performance there is a pre-populated default value for the date field "received from" and "sent from". This date can be modified relative to your required criteria. Please refer to chapter 33.3 "Administrating the application".

10.2 Sent

The tab "Sent" provides the status of your own MDS's that have been sent to your customers.

Note: The state may not represent the actual online IMDS state, as the download takes place only once a day (depending on IMDS AI interface). The information shows the state from the previous day.



The screenshot shows the 'iPoint Compliance Agent' window. The 'Sent' tab is selected in the top navigation bar. The search criteria section includes fields for Name, Part-/Item-/Material..., ID No., from Org. unit, State, Contact Person, Cu.-Part-No., and Recipient. There are also date pickers for 'Sent from' (2016/08/24) and 'Sent to'. Checkboxes for 'current Version', 'incl. deactivated', 'only preliminary', and 'only forwarded' are present. Below the search criteria is a 'Data' table with columns: Name, IMDS-ID, Part-/Item-/Mat.-No., Type, Weight, Unit of measure, Sent (GMT +1), Cust-Part-/Item-/Mat.-No., Contact person, Email address, Recipient, IMDS State, Edited, Preliminary, and MNS. The table is currently empty. At the bottom, there are sections for 'Reason for denial' and 'IHS-Comment', and buttons for 'Load' and 'New version'. A 'Display 2500 rows' indicator is at the bottom left.

Figure 80 Sent MDS's

The screen is divided in following areas:

- Search criteria
- Search result list
- Detail information

Attention: if the option iPCA/FORD is licensed, in addition the "real" recipient status will be display for MDS's sent to FORD.

- Actions (yellow area)

The following search criteria is available:

- **Name**
Name of the required MDS/module.
Your entered text in the field will automatically be appended with a wild card "*" at the end.
- **Status**
The status of the sent MDS
 - Open MDS
 - Not yet browsed
 - Browsed
 - Accepted
 - Rejected
 - Cancelled
 - Modified
- **Part-/item-/material no**
The allocated part or item no. to this MDS/Module
Your entered text in the field will automatically be appended with a wild card "*" at the end.
- **From Org Unit**
The organization unit that the sent MDS was assigned. A list of organization units is displayed, that the user has user permissions to view. The user can select or deselect one or more entries by using the keyboard and mouse options, Click, Shift-click, Ctrl-click, Ctrl-A if no entry is selected, the search looks for all organization units.
- **ID-No.**
The IMDS-ID that is assigned by the online IMDS system when creating the MDS.
- **Recipient**
By selecting the button "+" one or more companies or organizational units can be selected to search for the recipient of the sent MDS's. With the button "-" the selected entry/entries can be removed from the search list. For the search, all entries in the list are used, if no entry exists, all recipients will be searched for.
Within the search window for the companies, it is possible to select multiple entries. If at least one company is selected, a dialogue box, appears and asks if the selected company/companies should be treated as an organization unit or as company with all its associated organization units. The search will be restricted to either the sole company's organization unit or all the company's sub organization units.
- **Contact person**
You can search for a specific contact person within the MDS. The name entered must be the same as registered in the online IMDS system. Type the first name followed by the surname
- **Customer part no**
The customer Part no., this has been added into the recipient information data (see chapter 9.6).
- **Sent from**
Search containment date for MDS modules, which have been sent after a specific date.
The date can be input manually or by using the calendar icon.

- **Sent to**
Search containment date for MDS modules, which have been sent before a specific date. The date can be input manually or by using the calendar icon.
- **Current version**
If for a MDS, multiple versions exist, only the current version will be displayed, if this option is selected.
- **Only forwarded**
Search only for your own MDS's that have been sent, and whose origin was an accepted MDS.

PLEASE NOTE: Columns “**Contacts person**” and “**Email Address**” are displayed only if the user has the permission “**SENT_INCLUDE_CONTACT_DETAILS**” granted in his user profile.

Below the search result list, the detail information is available (read only):

- **Reason of denial**
The rejection reason from the customer
Attention: If iPCA/FORD is licensed, for all MDS's sent to FORD with the status “accepted with errors” or “rejected” the reason for this status is available in this field.
- **IHS comment**
The IHS comment for the selected MDS

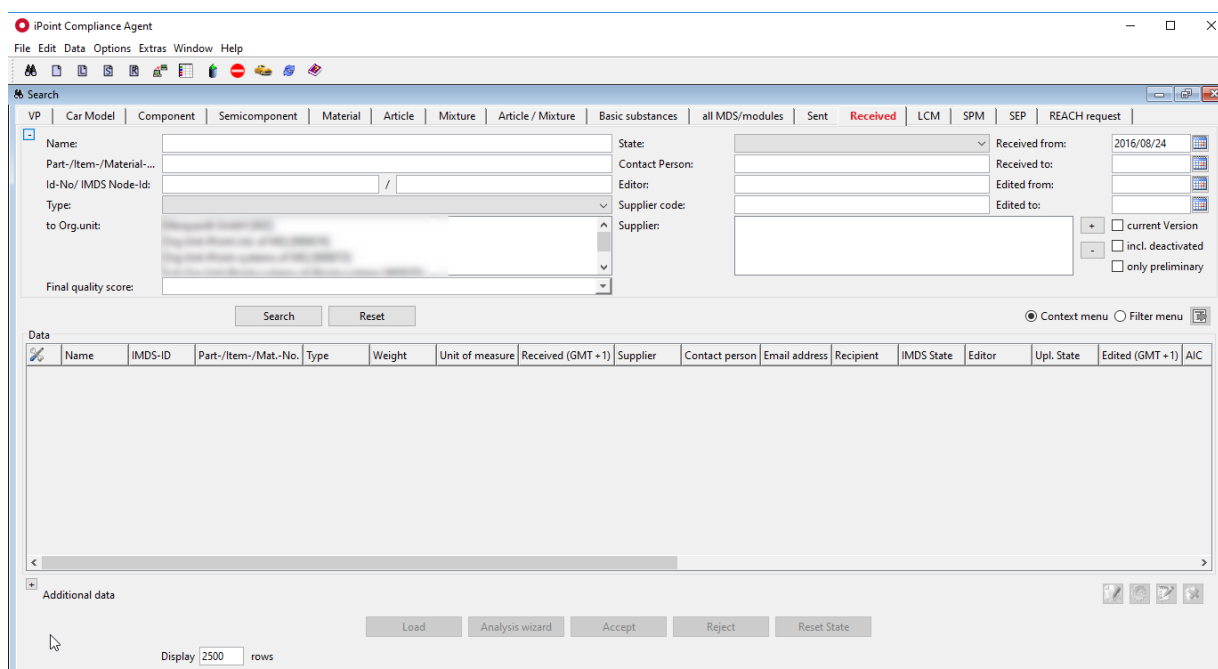
The following actions for the search result list are possible:

- **Load**
Display/process the MDS. The processing screen opens. The status ‘Not yet browsed’ is changed to ‘Browsed’ with the first load.
- **New Version**
For the selected MDS, a new version will be created and it will be loaded into a separate window. For more information about the functionality of “New version” please refer to chapter 7.4.4.
- **Export**
The search results can be exported as CSV or XLS file (please refer to chapter “Export”).

10.3 Received

With this tab “**Received**” the user has the opportunity to list and process the “Received” MDS (reject/accept)

Note: The state may not represent the actual online IMDS state, as the download takes place only once a day (depending on CXD). The information shows the state from the previous day.



The screenshot shows the 'iPoint Compliance Agent' window. The 'Search' tab is active, displaying a search criteria form on the left and a search result list on the right. The search criteria form includes fields for Name, Part-/Item-/Material..., Id-No/ IMDS Node-Id, Type, to Org.unit, State, Contact Person, Editor, Supplier code, Supplier, Received from, Received to, Edited from, Edited to, and Final quality score. The search result list is currently empty, showing only the column headers: Name, IMDS-ID, Part-/Item-/Mat.-No., Type, Weight, Unit of measure, Received (GMT+1), Supplier, Contact person, Email address, Recipient, IMDS State, Editor, Upl. State, Edited (GMT+1), and AIC. At the bottom, there are buttons for 'Load', 'Analysis wizard', 'Accept', 'Reject', and 'Reset State', along with a 'Display 2500 rows' indicator.

Figure 81 Received MDS's

The screen is divided in following areas:

- Search criteria
- Search result list
- Detail information
- Actions

The following search criteria is available:

- **Name**
Name of the received MDS.
Your entered text in the field will automatically be appended with a wild card "*" at the end.
- **Status**
The status of the received MDS's
 - Open MDS's
 - Browsed
 - Not yet browsed
 - Accepted
 - Rejected
 - Cancelled
 - Modified
- **Part-/item-/material no**
The associated part or item no. for this received MDS.
Your entered text in the field will automatically be appended with a wild card "*" at the end.

- **To Org Unit**

The organization unit that the MDS was sent to

Please refer to the description of the search criteria “From Org.Unit” above in chapter 9.2 “Sent MDS’s”.

- **ID-No.**

The IMDS-ID that is assigned by the online IMDS system when creating a MDS/module.

- **Supplier**

By clicking the button “+” one or more companies or organizational units can be selected as the supplier of a received MDS. Please refer to the description of the search criterion “Recipient” above in chapter 9.2 “Sent MDS’s”.

- **Contact person**

You can search for a contact person within the MDS. The name must be entered according to the format in the Online IMDS system. Type the first name and surname of the contact Editor
The name of the user who has accepted/rejected the MDS

- **Received from ... to**

Timeframe in which the MDS was received

The date can be set manually or using the calendar icon.

- **Edited from ... to**

Timeframe in which the MDS was accepted or rejected

The date can be set manually or by using the calendar symbol the date can be set.

- **Current version**

If for an MDS, multiple versions exist, only the current version will be displayed, if this option is selected.

PLEASE NOTE: Columns “**Contacts person**” and “**Email Address**” are displayed only if the user has the permission “**RECEIVED_INCLUDE_CONTACT_DETAILS**” granted in his user profile.

Within the search results list, also the checked results of the CSI checks are available (optional) if they have been configured for the USC/inbox check. As soon as a CSI rule group has been checked within the USC the results are available (for the standard table configuration) in the received search result list – For more information, please refer to the SCM/USC user manual.

Users that have an own received search result list configuration, can add the CSI result columns (after the first check within USC) with the personalization (please see chapter 32.1).

Below the search result list, the detailed information is available:

- **Reason of denial**

The reason for the rejection from the customer

- **IHS comment**

The IHS comment of the selected MDS

To edit these fields, the button  to the right of the field must be used.

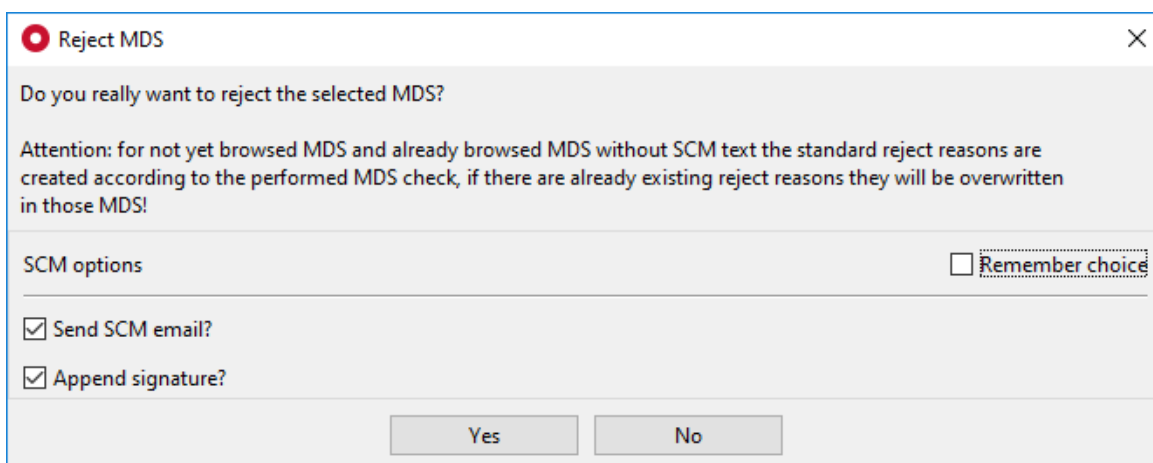


The following actions, following the search are possible:

- **Load**
Display/process the MDS. The processing screen opens. If the status is 'Not yet browsed' then the status will be changed to 'Browsed' with the first load.
- **Accept**
If the received MDS is ok, it is accepted by clicking the respective button. The internal transfer status will be set and the MDS will be included in the next data upload.
If a MDS is accepted, it can then be added into your own MDS/modules to be used.
- **Reject**
Reject is only available, when the MDS is in state "Browsed".
A reject reason for denial must be entered.
The internal transfer status will be set and the MDS will be included in the next data upload.

Figure 82 Generate SCM e-mail

Before the MDS/module can be rejected the SCM E-mail must be generated/edited and saved.



Reject MDS

Do you really want to reject the selected MDS?

Attention: for not yet browsed MDS and already browsed MDS without SCM text the standard reject reasons are created according to the performed MDS check, if there are already existing reject reasons they will be overwritten in those MDS!

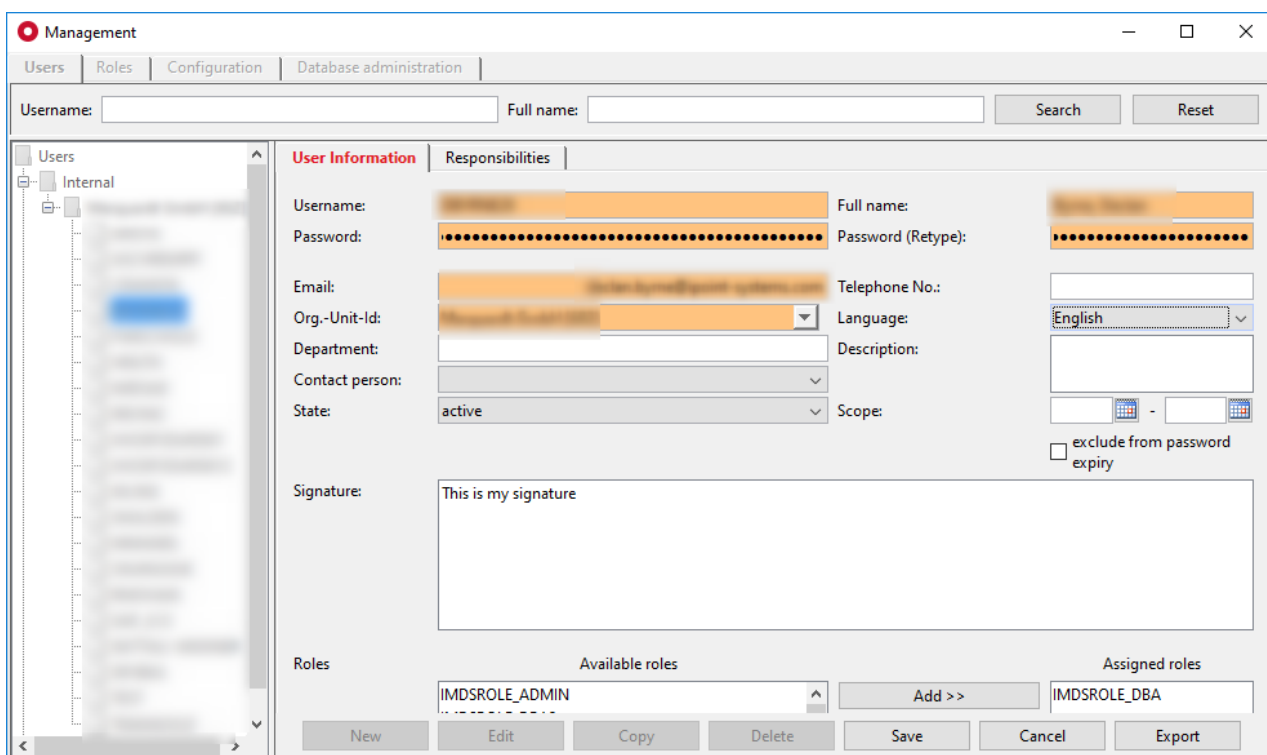
SCM options ☐ Remember choice

☒ Send SCM email?

☒ Append signature?

Figure 83 Reject MDS

If you have selected “Append signature?” You must first add your signature to your user profile in the User Management. If you do not have access to the user management, please contact your application administrator to update your profile.



Management

Users | Roles | Configuration | Database administration

Username: Full name:

Users

Internal

User Information | Responsibilities

Username: Full name:

Password: Password (Retype):

Email: Telephone No.:

Org.-Unit-Id: Language:

Department: Description:

Contact person:

State: Scope:

☐ exclude from password expiry

Signature:

Roles

Available roles:

Assigned roles:

Figure 84 Add your signature

If you have not entered the reason for denial or added/edited the SCM text, the following message will appear. The MDS/module will not be rejected until you have completed the required actions.

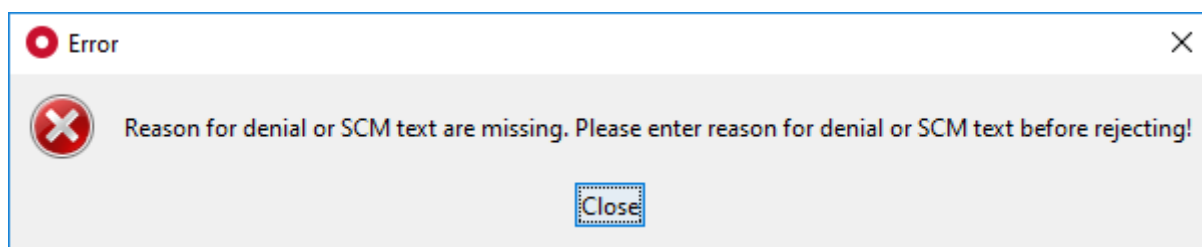


Figure 85 Error for missing reason or SCM text

- **Compare (optional)**

This button is active only if 2-5 components are selected in the result list and it allows to compare them using different attributes (see **chapter 30**).

PLEASE NOTE: This button is displayed only if the Compare module is licensed and if the user has the permission “**COMPARE**” granted in his role.

- **Export**

The search results can be captured and exported as a CSV or XLS file (please refer to chapter “Export”).

If you have selected “Accept” or “Reject” the name of the authoring user will be stored and displayed.

Optional:

It is possible to accept or reject multiple MDS with one action, even if they are in the state “Not yet browsed”. The user can select more than one row, by using the keyboard and mouse options, Click, Shift-click, Ctrl-click, Ctrl-A, and then selecting the respective button.

However, if the MDS is to be Accepted no open “ToDo’s” must exist (when module USC is licenced). For rejections, a reject reason will be automatically populated for the Not yet browsed MDS’s, generated from the existing system check errors and the “Todos” list that are marked as an error (including the additional text) This also applies for browsed MDS’s that the SCM text is not yet .

11 LCM & SPM Requests (Optional)

11.1 General

The general usage of MDS requests and the handling of requests is not part of this documentation.

This documentation only describes the functionality in iPCA/IHS.

When licensing the modules iPCA/LCM and/or iPCA/SPM, in iPCA/IHS, not only the described functionality is available, but also all other functions from the licensed modules are also available.

The description of these advanced functions are described in the respective manuals.

11.2 LCM Requests (Life Cycle Management)

11.2.1 Create a request

To create a NEW request, select the “Create LCM request” from the File – New – option

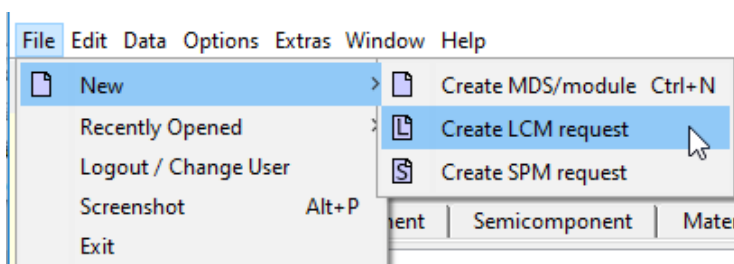


Figure 86 Create an LCM request

11.2.2 General

The screen for LCM received requests is as follows:

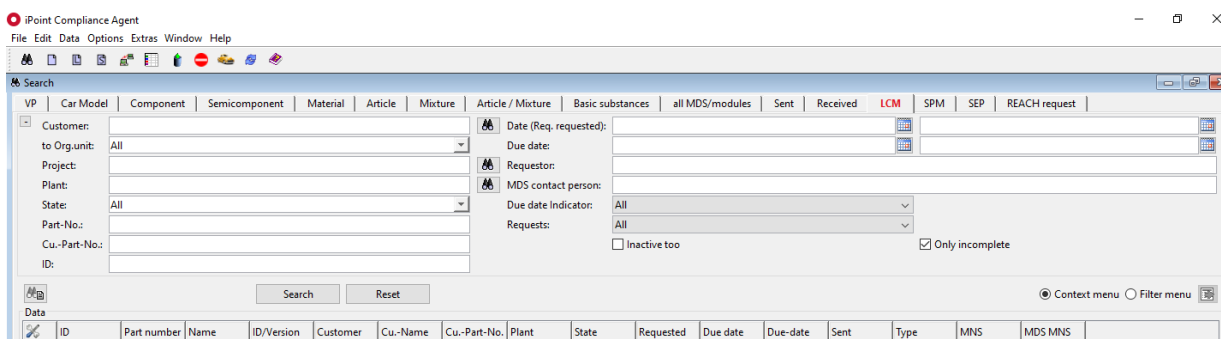


Figure 87 Search for Received LCM request

- Search criteria
- Search result list
- Actions

11.2.3 Search criteria

The following search criteria is available:

- **Customer**
The name of the organizational unit of the supplier the request was sent too. Using the spyglass, the organizational unit of the supplier can be searched for.
- **To Org.Unit**
The name of your own organizational unit that has created the request.
- **Project**
The project that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
- **Plant**
The plants that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
- **State**
The specific state of a request. (i.e.. Assigned MDS accepted)
- **Part No.**
The part number for which the request was received
- **Cu.-Part No.**
The customer Part number.
- **ID**
The ID assigned to the request
- **Date (Req. requested)**
The date period the request was created
- **Due Date**
The date period the request was due
- **Requestor**
The name of the internal requestor of the request.
- **MDS contact person**
The name of the contact person that supplied the MDS.
- **Due date indicator**
Select the due date indicator colour state (i.e.. If the deadline has been achieved, Green)
This due date indicator, displays by selecting a colour, a coloured icon that represent the state of the request
- **Requests**
The type of request assigned. (i.e.. Only IMDS req.)
- **Only incomplete**
Search for request that are only in a state of incomplete.

- **Inactive too**
Search for requests that are inactive.

11.2.4 Search result list

The search result list, contains the following information:

- **ID**
The internal IPCA ID of the request
- **Part number**
The internal part number assigned to the request
- **Name**
The descriptive part name of the assigned MDS
- **ID/Version**
The IMDS ID /version to the assigned MDS
- **Customer**
The name of the organization unit of the customer that has sent the request
- **Cust. Name**
The descriptive part name the customer has given to the MDS
- **Cust. Number**
The customer part number, the customer has given to the MDS
- **Plant**
The name of the plant associated with the part.
- **State**
The status indicator of the MDS in the system.
- **Requested**
The date the customer has requested the MDS
- **Due date (indicator)**
This is the due date indicator, that displays a coloured icon that represent the state of the request (i.e.. If the deadline has been achieved, Green)
- **Due date**
The date until when the customer expects the MDS
- **Sent**
The date an associated MDS was sent
- **Type**
The request type (i.e.. Component, Semi Component or Material)

- **MNS**
Indicates if multiple internal part numbers exist for the associated MDS and allows the user to edit/add new numbers.
- **MDS MNS**
Indicates if multiple internal part numbers exist for the associated MDS and allows the user to edit/add new numbers.

11.2.5 Actions

The following actions are available:

- **Edit**
Edit the selected request
Please refer to chapter 11.2.6
- **History**
Shows the history of the request.
- **Copy**
Allows the user to copy a request and edit the details.
- **MDS Details**
Loads the MDS and allows the user to review specific information.
- **Assign MDS**
Assign an existing MDS to the request. When assigning, the recipient data from the request, will be added to the MDS automatically.
- **Reject online request**
Reject a request in the external Online IMDS system
- **Upload online request**
Update the status of a request in the external Online IMDS system
- **Export**
Export the search result list to (.csv, .xls, .xlsx)

11.2.6 Editing a request

When using the button “Edit”, the following window will open:

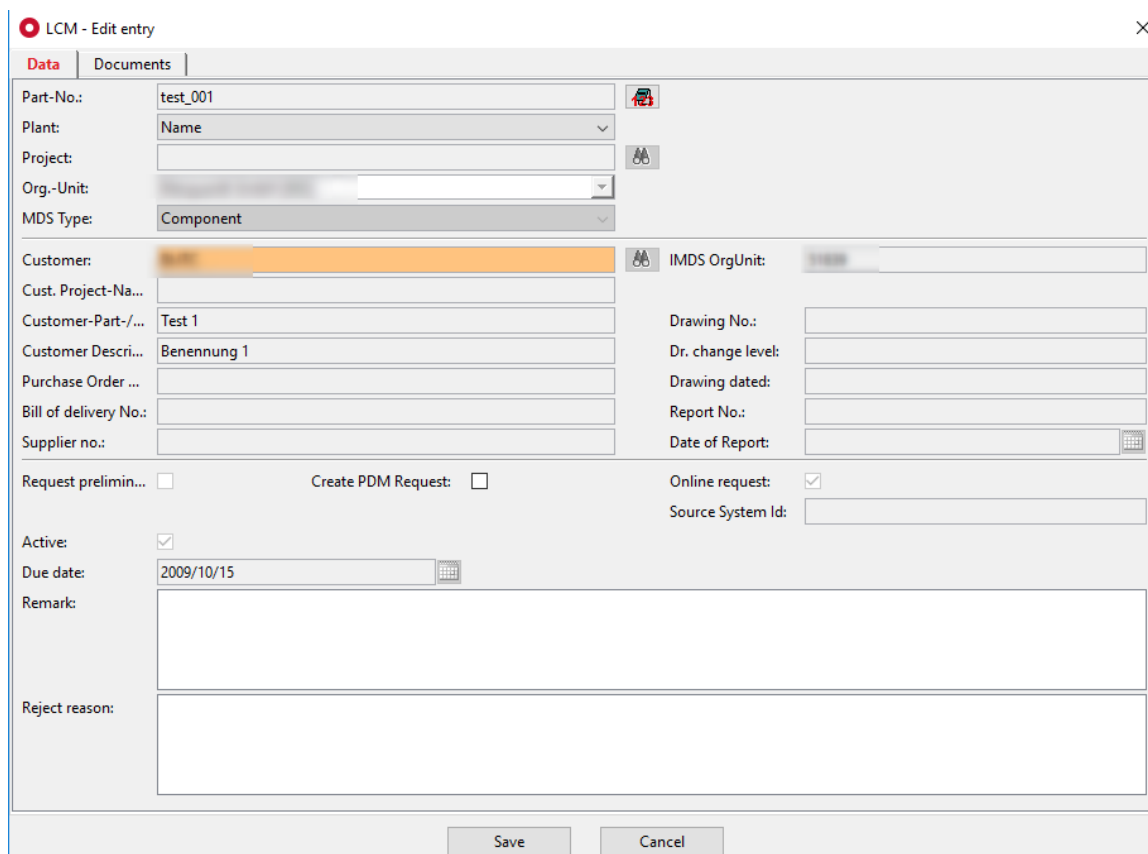


Figure 88 Edit a received request

The following information can be edited:

- **Part number**
The internal part number of the requested MDS
- **Reject reason**
The reason for denial, if the request is to be rejected.

The following actions are available:

- **Save**
Save the entered information
- **Cancel**
Close the window without saving any changes

11.3 SPM Requests (SPM)

11.3.1 General

The screen for your own requests is structured as follows:

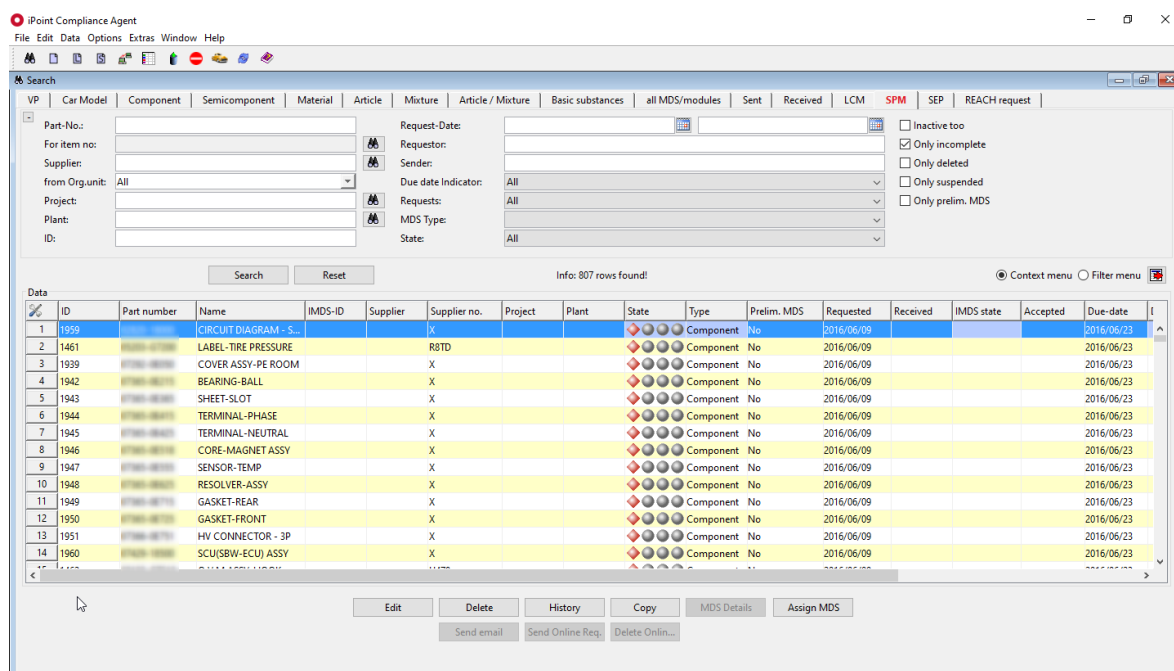


Figure 89 Your Own SPM Requests

- Search criteria
- Button to create new requests
- Search result list
- Actions

11.3.2 Search criteria

The following search criteria is available:

- **Part-No.:**
The part number
- **For Item no:**
Search for the item no,
- **Supplier**
Name of the organization unit of the supplier that the request was created. Using the spyglass the standard search for organization units can be used.
Recipient name of your own requesting organization unit
- **from Org.Unit**
The name of your own organizational unit that has received the request.

-
- **Project**
The project that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
 - **Plant**
The plants that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
 - **ID**
The ID assigned to the request
 - **Request-Date**
The date period the request was created
 - **Requestor**
The name of the internal requestor of the request.
 - **Sender**
The name of the contact person that supplied the MDS.
 - **Due date indicator**
Select the due date indicator colour state (i.e.. If the deadline has been achieved, Green)
This due date indicator, displays by selecting a colour, a coloured icon that represent the state of the request
 - **Requests**
The type of request assigned. (i.e.. Only IMDS req.)
 - **MDS Type**
This is the type of MDS, Component, Semi Component or Material
 - **State**
This is the in-house state of the request (i.e.. Open requests, Assigned MDS Accepted/Rejected etc..)
The below options can be selected as a single or multi select options. If nothing is selected, all criteria will be used with the exception of "Inactive too" this has to be checked to find inactive requests.
 - **Inactive too**
Search for requests that are inactive.
 - **Only incomplete**
Search for request that are only in a state of incomplete.
 - **Only deleted**
Searches for only deleted request
 - **Only suspended**
Searches for only suspended requests
 - **Only Prelim. MDS**
Searches for only Prelim MDS's

11.3.3 Search result list

The search result list contains the following information:

- **Part number**
The internal part number
- **Name**
The descriptive name of the requested MDS
- **IMDS-ID**
The IMDS-ID for the reported MDS (if reported)
- **Supplier**
The name of the supplier that the request was assigned.
- **Supplier No.**
This is the external supplier part no. reference
- **Project**
The project that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
- **Plant**
The plants that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
- **State**
This is the in-house state of the request (i.e.. Open requests, Assigned MDS Accepted/Rejected etc.)
- **Type**
This is the type of MDS, Component, Semi Component or Material
- **Prelim. MDS**
This is a “Yes” or “No” if the MDS is a Prelim MDS
- **Requested**
The date, the MDS was requested
- **Received**
The date a MDS was received.
- **IMDS state**
This is the state of the requesting the in-house system
- **Accepted**
The date a MDS was accepted.
- **Due- Date**
This is the due date you are expecting the supplier to provide the MDS by (See Options – Parameter – SPM Parameter for more information)

- **Due Date**
This is the due date indicator, that displays a coloured icon that represent the state of the request (i.e.. If the deadline has been achieved, Green) Suspended
Indicates if the request is in a suspended state “Yes” or “No”
- **Rejected**
The date a MDS was rejected last regarding the request
- **MNS**
Indicates if multiple internal part numbers exist for the associated MDS and allows the user to edit/add new numbers if populated.
- **MDS MNS**
Indicates if multiple internal part numbers exist for the associated MDS and allows the user to edit/add new numbers if populated.

11.3.4 Actions

Following actions are available:

- **Edit**
Edit a request
Please refer to chapter 11.3.6 “Editing a request”
- **Delete**
Allows the user to delete the request
- **History**
Shows the history of the request.
- **Copy**
Allows the user to copy a request and edit the details.
- **MDS Details**
Loads the MDS and allows the user to review specific information.
- **Assign MDS**
Allows the user to assign an MDS to an existing request (inactive if the MDS has been received)
- **Send e-mail**
Allows the user to send the supplier an e-mail
- **Send online request**
Send the request to the supplier using the external Online IMDS system
- **Delete online request**
Delete a request in the Online IMDS system
- **Export** 
Export the search result list to (.csv, .xls, .xlsx)

11.3.5 Create a request

When selecting “create”, following screen will open:

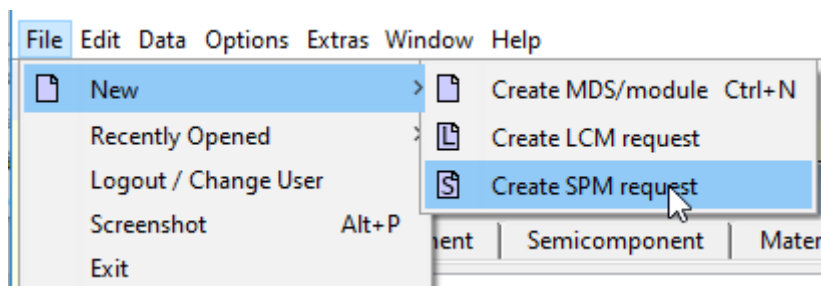
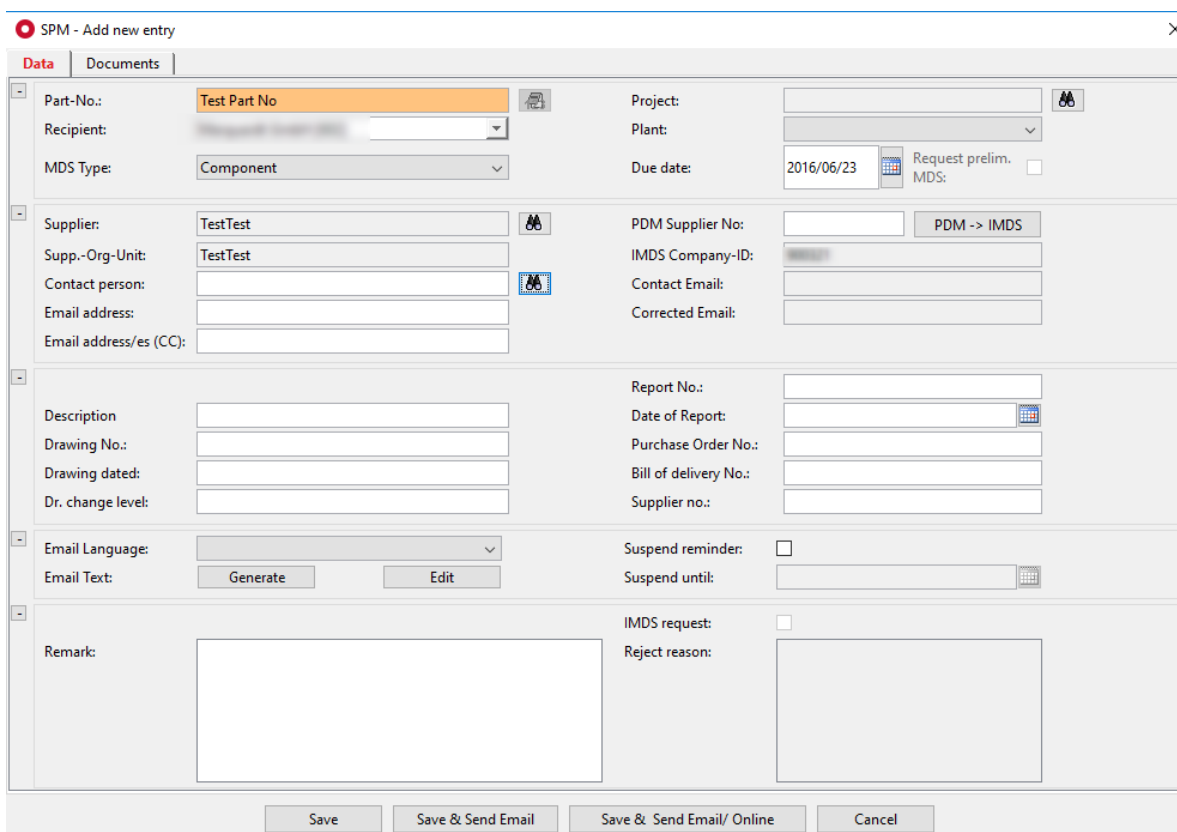


Figure 90 Create a SPM request



The screenshot shows the 'SPM - Add new entry' window. It has a 'Data' tab and a 'Documents' tab. The form contains several sections for data entry:

- Part Information:** Part-No. (Test Part No), Recipient (dropdown), MDS Type (Component), Project (dropdown), Plant (dropdown), Due date (2016/06/23), Request prelim. MDS (checkbox).
- Supplier Information:** Supplier (TestTest), Supp.-Org-Unit (TestTest), Contact person (dropdown), Email address (text), Email address/es (CC) (text), PDM Supplier No. (text), IMDS Company-ID (text), Contact Email (text), Corrected Email (text), and a 'PDM -> IMDS' button.
- Description and Reporting:** Description (text), Drawing No. (text), Drawing dated (text), Dr. change level (text), Report No. (text), Date of Report (text), Purchase Order No. (text), Bill of delivery No. (text), and Supplier no. (text).
- Email Settings:** Email Language (dropdown), Email Text (Generate/Edit buttons), Suspend reminder (checkbox), and Suspend until (text).
- Remarks and Rejection:** Remark (text area), IMDS request (checkbox), and Reject reason (text area).

At the bottom, there are buttons for 'Save', 'Save & Send Email', 'Save & Send Email/ Online', and 'Cancel'.

Figure 91 Creating a SPM Request

The following information can be entered:

- **Common information**
 - **Part number**
The internal part number that the supplier should assign to the MDS

-
- **Recipient**
The internal organization unit that the request should be sent from.
 - **MDS type**
The type of requested MDS (component, semicomponent, material)
 - **Project**
The project that was assigned. (For more information on creating and assigning projects, see the LCM & SPM manuals)
 - **Plant**
The plants that was assigned. (For more information on creating and assigning plants, see the LCM & SPM manuals)
 - **Due date**
The due date, when the MDS is required
 - **Supplier information**
 - **Supplier**
The company that the request is being sent to. The search is done by using the spyglass.
 - **Supplier Org-Unit**
The Organization unit of the supplier from which the MDS has been requested
 - **Contact Person**
The contact person at the supplier the request will be sent too.
 - **Email Address**
The Email address the request is to be sent too.
 - **Email address/es (CC)**
The Email address/es of additional recipients of the request.
 - **PDM Supplier No.**
This is the supplier PDM reference No.
 - **IMDS company ID**
The IMDS company ID of the selected supplier. This is automatically populated when the supplier company is entered
 - **Recipient data**
 - **Description**
The name for the requested MDS
 - **Drawing-no**
The drawing number
 - **Dr. change level**
The change level of the requested MDS
Note: This field length has been increased from 20 to 30 characters maximum length.
This change has been introduced due to changes for IMDS Release 11 (13-11-2016)

- **Drawing dated**
The drawing date
- **Purchase order**
The purchase order number
- **Report no**
The number of the sample report
- **Date of report**
The date of the sample report
- **Bill of delivery**
The bill of delivery number
- **Supplier no**
The supplier number
- **Misc.**
 - **Email Language**
This allows the email content to be converted into a different language, selected from the dropdown menu.
 - **Email Text (Generate & Edit)**
Allows the user to create or edit a predefined content relevant to the request.
 - **Suspend Reminder**
Allow the user to suspend sending the request.
 - **Suspend Until**
Allows the user to specify a date period for the suspension.
 - **Remarks**
This allows the user to add comments.
 - **Reject Reason**
This allows the user to add a reject reason.

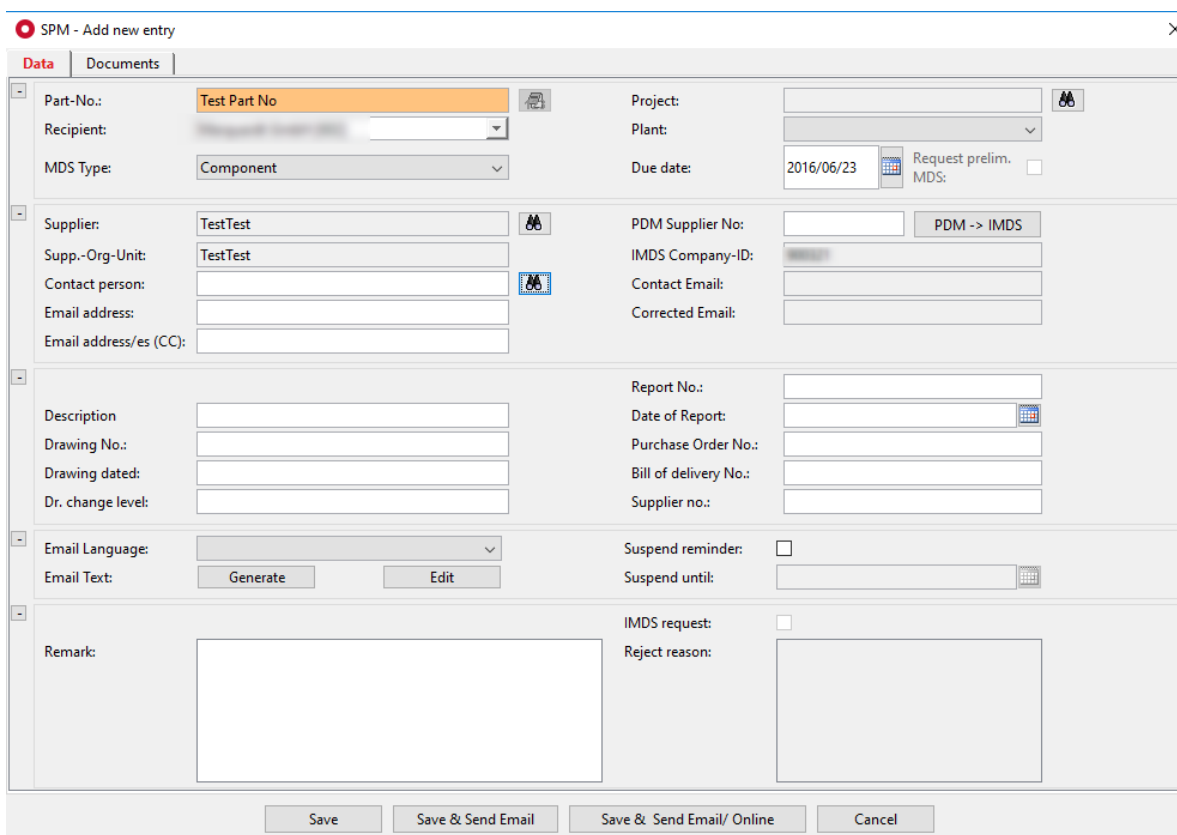
The following actions are available

- **Save**
Save the information entered and creation of the request
- **Save & Send Email**
Allows the user to save the request and sends the Email to the customer
- **Save & Send Email/online**
Allows the user to save the request and sends the request to the customer via the Online IMDS system

- **Cancel**
Closes the window without saving the information (after confirmation)

11.3.6 Editing a request

When using “edit” the following screen will open:



The screenshot shows the 'SPM - Add new entry' window with the following fields and controls:

- Part-No.:** Test Part No
- Recipient:** [Dropdown menu]
- MDS Type:** Component
- Project:** [Text field]
- Plant:** [Dropdown menu]
- Due date:** 2016/06/23
- Request prelim. MDS:** [Checkbox]
- Supplier:** TestTest
- Supp.-Org-Unit:** TestTest
- Contact person:** [Text field]
- Email address:** [Text field]
- Email address/es (CC):** [Text field]
- PDM Supplier No.:** [Text field]
- IMDS Company-ID:** [Text field]
- Contact Email:** [Text field]
- Corrected Email:** [Text field]
- Report No.:** [Text field]
- Date of Report:** [Text field]
- Purchase Order No.:** [Text field]
- Bill of delivery No.:** [Text field]
- Supplier no.:** [Text field]
- Email Language:** [Dropdown menu]
- Email Text:** [Generate] [Edit]
- Suspend reminder:** [Checkbox]
- Suspend until:** [Text field]
- Remark:** [Text area]
- IMDS request:** [Checkbox]
- Reject reason:** [Text area]

Buttons at the bottom: Save, Save & Send Email, Save & Send Email/ Online, Cancel.

Figure 92 Create a SPM Requests

Attention: As soon as a request has been sent, no information can be changed, a new request must be created.

The information available for editing is the same as for creation.

12 Upload information

12.1 General

The processing of the MDS/modules takes place entirely using the iPCA and is independent of IMDS. Therefore, it is necessary to download the required data from the Online IMDS system into the local database and to upload newly created or updated data to the Online IMDS system.

The main activities between the local and external database are the manual release for upload and activities to send/accept/reject MDS's.

The data transfer is done using a background processes which are controlled and executed via the iPEX engine software on the server. These background processes are started automatically, and the start times and intervals can be set to specific values during installation.

To access the upload information, select **"Data – Upload information"**

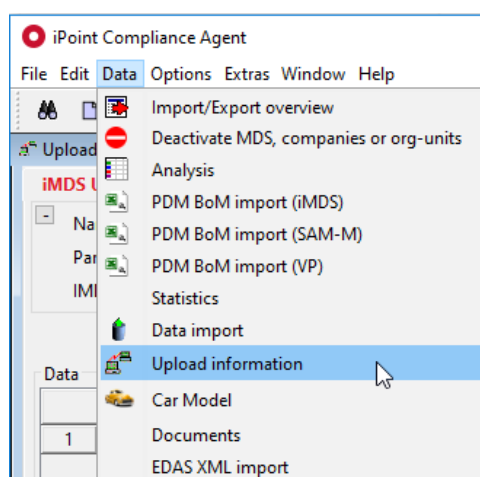


Figure 93 Upload information

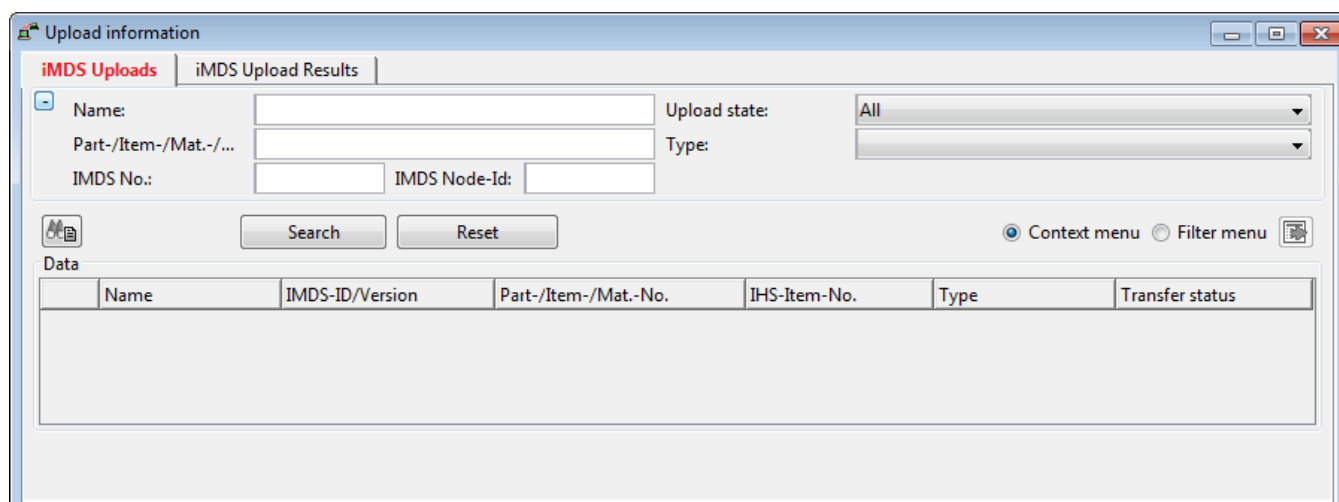
Following functions are available:

- **IMDS upload**
Information about pending uploads
See chapter 12.2 "IMDS Upload".
- **IMDS Upload Result**
Detail information about processed uploads to the external system IMDS
See chapter 12.3 "IMDS Upload Result".
- **MACSI uploads**
Please refer to the MACSI user manual.

12.2 IMDS Upload

This screen will display all current pending upload requests.

The listed actions will be handled automatically by a mission.



Upload information

iMDS Uploads | iMDS Upload Results

Name: Upload state:

Part-/Item-/Mat.-/... Type:

IMDS No.: IMDS Node-Id:

☒ Context menu ☐ Filter menu

Name	IMDS-ID/Version	Part-/Item-/Mat.-No.	IHS-Item-No.	Type	Transfer status

Figure 94 Upload information - iMDS Uploads

The screen is structured as follows:

- Search criteria
- Search result list
- Actions

The following search criteria is available:

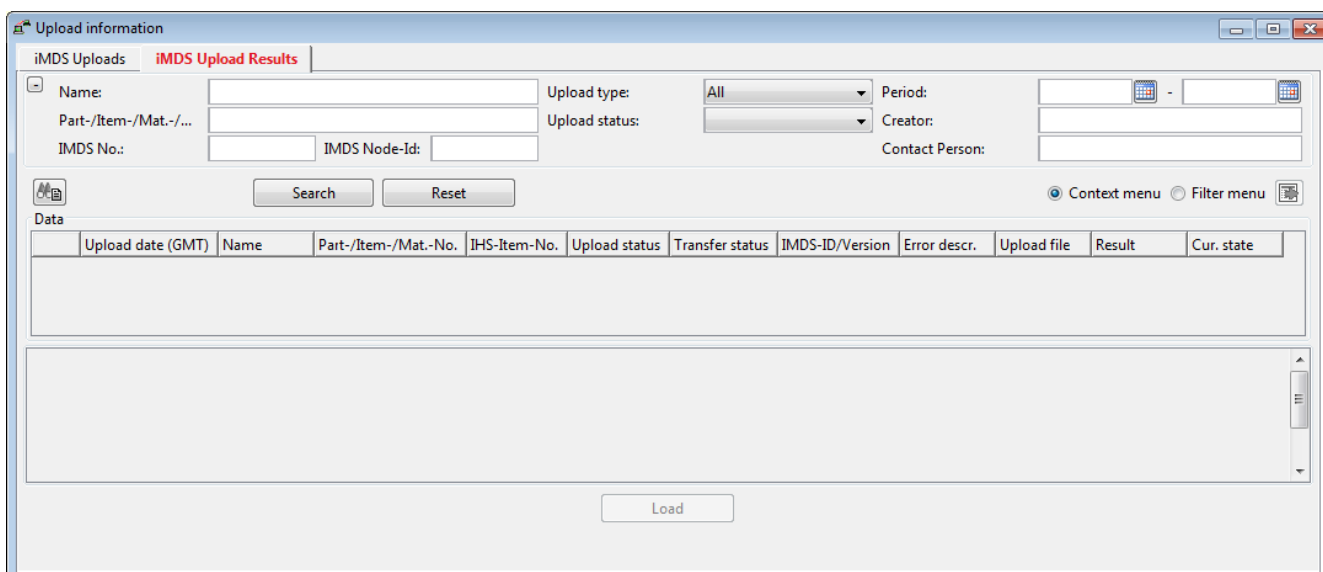
- **Name**
The name of the MDS/module that an upload was requested for.
- **Upload state**
The ability to search for a specific upload action:
 - All
 - Upload
 - Int. Release
 - Send
 - Propose
 - Publish
 - Accept
 - Reject
 - Obsolete
 - Not Obsolete
 - MDS request create
 - MDS request assign
 - MDS request send

- MDS request unassign
 - MDS request reject
 - MDS request delete
 - MDS request reassign
 - CHM request send
 - CHM data upload
- **Part-/Item-/Material-number**
The part number of the MDS that the upload was created for.
 - **Type**
The type of the uploaded MDS/module that the upload was created for:
 - Component
 - Semicomponent
 - Material
 - **IMDS No.**
The IMDS Module ID of the MDS for that the upload was created for.
 - **IMDS Node ID**
The IMDS Node ID that the upload was created for.

Using the “**Export**” button the current search result list can be exported to (.csv, .xls, .xlsx).

12.3 IMDS Upload Result

As soon as the upload is complete, the result is available on the page “**iMDS Upload results**”.



The screenshot shows a software window titled "Upload information" with two tabs: "iMDS Uploads" and "iMDS Upload Results". The "iMDS Upload Results" tab is active. It features a search area with fields for Name, Part-/Item-/Mat.-/..., IMDS No., IMDS Node-Id, Upload type (set to "All"), Upload status, Period, Creator, and Contact Person. There are "Search" and "Reset" buttons. Below the search area is a table with the following columns: Upload date (GMT), Name, Part-/Item-/Mat.-No., IHS-Item-No., Upload status, Transfer status, IMDS-ID/Version, Error descr., Upload file, Result, and Cur. state. The table is currently empty. At the bottom of the window is a "Load" button.

Figure 95 Upload information - iMDS Upload Results

The screen is structured as follows:

- Search criteria
- Search result list
- Detail information about the selected upload
- Actions

The following search criteria are available:

- **Name**
The name of the MDS/module that an upload was done for.
- **Upload type**
The type of the processed upload:
 - All
 - Modules/MDS
 - rej./acc. MDS
 - MDS requests
 - CHM request
 - CHM data
- **Period**
Period of time in which the upload was processed.
This can be defined either manually in the text fields or by using  button and selecting the date from the calendar shown.
- **Part-/item-/material number**
The part number assigned to the processed MDS/module.
- **Upload status**
The result of the upload:
 - OK
 - ERROR
 - UPLOAD ERROR
 - PROCESSING
 - RESULT_RECEIVED
 - ERROR-INTERN
- **Creator**
The creator set in the uploaded MDS.
- **IMDS No.**
The IMDS Module ID of the MDS/module for that the upload was done for.
- **IMDS Node ID**
The IMDS Node ID that the upload was done for.
- **Contact person**
The contact person set in the uploaded MDS.

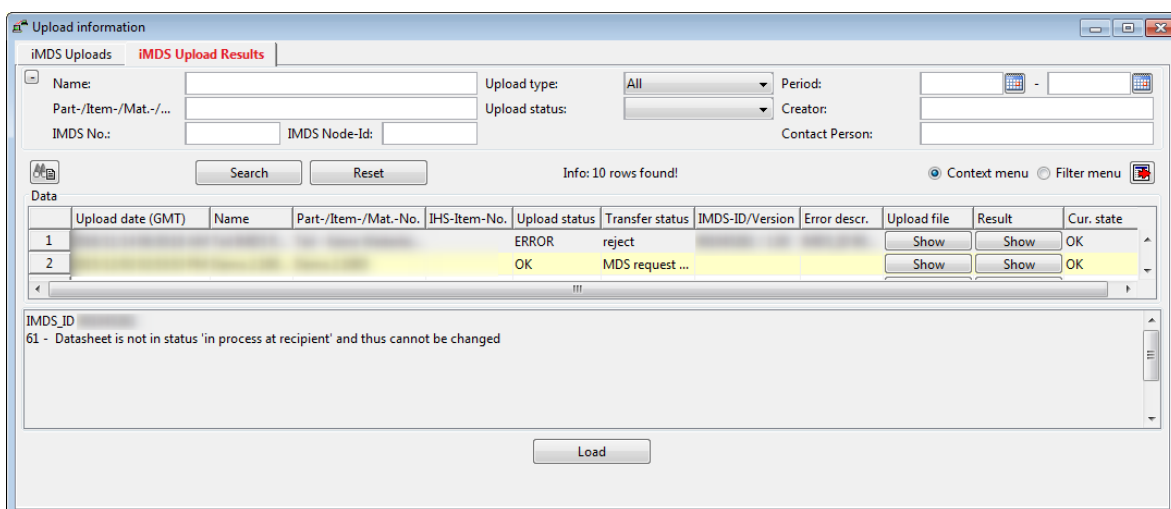
The following action is available:

- **Load**
Open the selected MDS/Module

Using the “**Export**” button the current search result list can be exported to (.csv, .xls, .xlsx).

12.4 Information within the search result list

The search result list contains the following very important information:



The screenshot shows the 'Upload information' window with the 'iMDS Upload Results' tab selected. It features search filters for Name, Part-/Item-/Mat.-/..., IMDS No., IMDS Node-Id, Upload type, Upload status, Period, Creator, and Contact Person. Below the filters is a table with 10 rows found. The table has columns: Upload date (GMT), Name, Part-/Item-/Mat.-No., IHS-Item-No., Upload status, Transfer status, IMDS-ID/Version, Error descr., Upload file, Result, and Cur. state. Two rows are visible: Row 1 shows an 'ERROR' status with a 'reject' transfer status, and Row 2 shows an 'OK' status with an 'MDS request ...' transfer status. Below the table is a details section for 'IMDS_ID' 61, stating 'Datasheet is not in status 'in process at recipient' and thus cannot be changed'. A 'Load' button is at the bottom.

Upload date (GMT)	Name	Part-/Item-/Mat.-No.	IHS-Item-No.	Upload status	Transfer status	IMDS-ID/Version	Error descr.	Upload file	Result	Cur. state
				ERROR	reject			Show	Show	OK
				OK	MDS request ...			Show	Show	OK

IMDS_ID
61 - Datasheet is not in status 'in process at recipient' and thus cannot be changed

Load

Figure 96 Upload information - iMDS Upload Results - Details of the search result list

- **Upload status**
If the upload has failed, the upload will be marked with “**ERROR**”. In this case more information is available in the Results area.
- **Upload file**
When using the button “**Show**”, all the details from the upload result file will be shown, so that the user can see the reason for the upload error, to be able to correct it. As soon as the problem is corrected, the upload can be requested again.
- **Result**
When using the button “**Show**”, in the details area the complete upload file will be displayed.

More information, especially for IMDS error messages can be found using the original CXD documentation for the upload interface.

13 Print

13.1 Print Option

The “Print” option is available for all screens where you have loaded the MDS/module and are viewing an MDS/module tree structure. The top-level node must be selected, if other nodes in the tree are selected, the print icon will be deactivated.

There is also a print option within the MDS/module analysis function, see chapter 13.2



Figure 97 Print option

Select the “Print” icon. The following dialogue box will open, allowing you to make further selections, regarding the language and the recipient information you would like to include in the report.

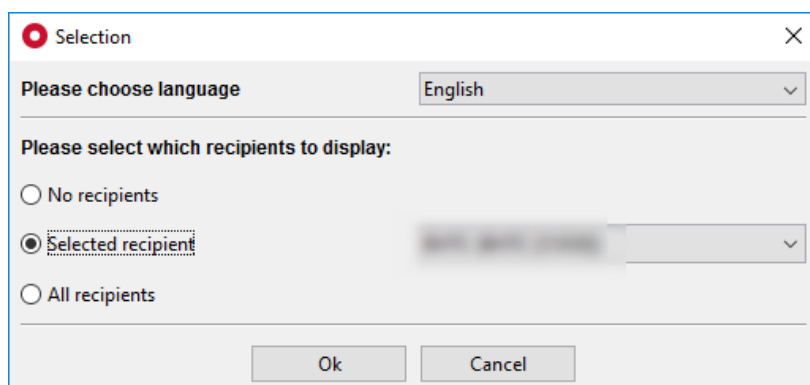
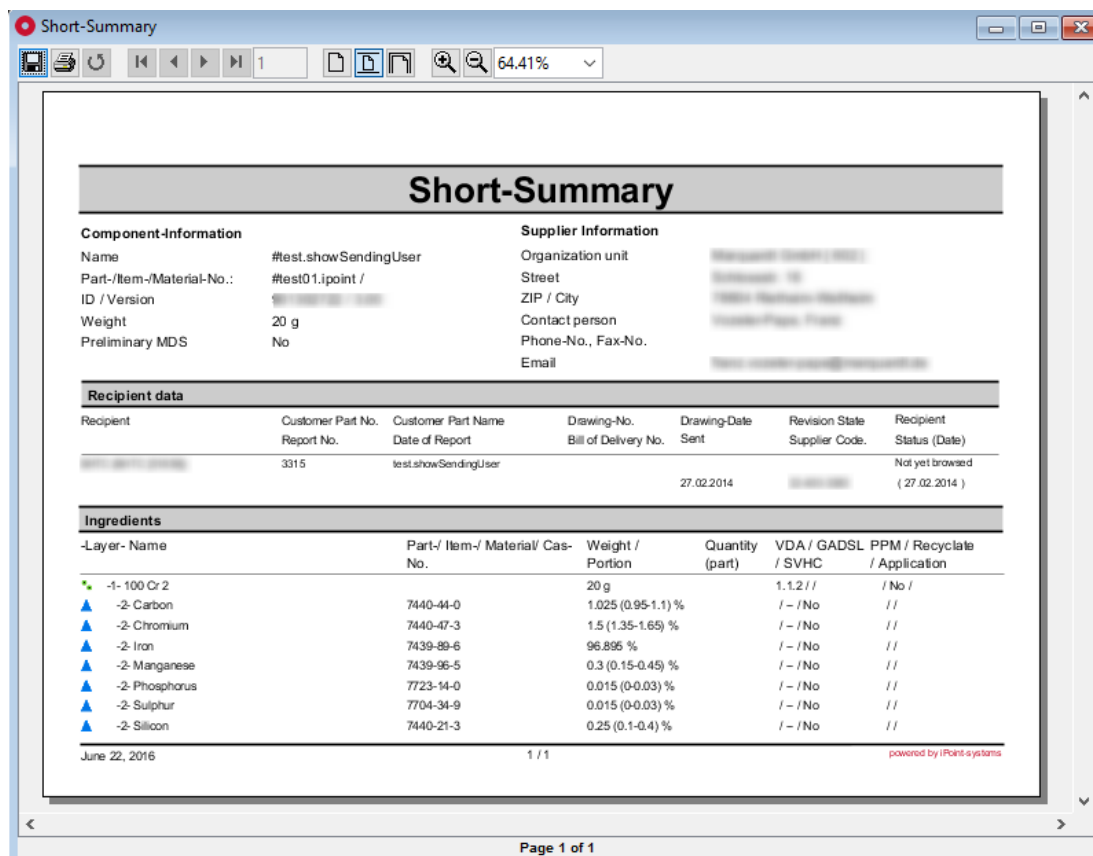


Figure 98 Print option

Select “OK” and the following “Print preview” window will open to enable you to review the .pdf file. You will have the option to “Save” the file to your local/network drive or “Print” the .pdf file (local/network printer must be connected/installed)

The short summary in table form, shows the information about an MDS/module and is only available if the user has the user privilege “MDS_PRINT”.



Short-Summary

Component-Information		Supplier Information	
Name	#test.showSendingUser	Organization unit	
Part-/Item-/Material-No.:	#test01.ipoint /	Street	
ID / Version		ZIP / City	
Weight	20 g	Contact person	
Preliminary MDS	No	Phone-No., Fax-No.	
		Email	

Recipient data						
Recipient	Customer Part No.	Customer Part Name	Drawing-No.	Drawing-Date	Revision State	Recipient
Report No.	Date of Report	Bill of Delivery No.	Sent	Supplier Code	Status (Date)	
	3315	test.showSendingUser		27.02.2014		Not yet browsed (27.02.2014)

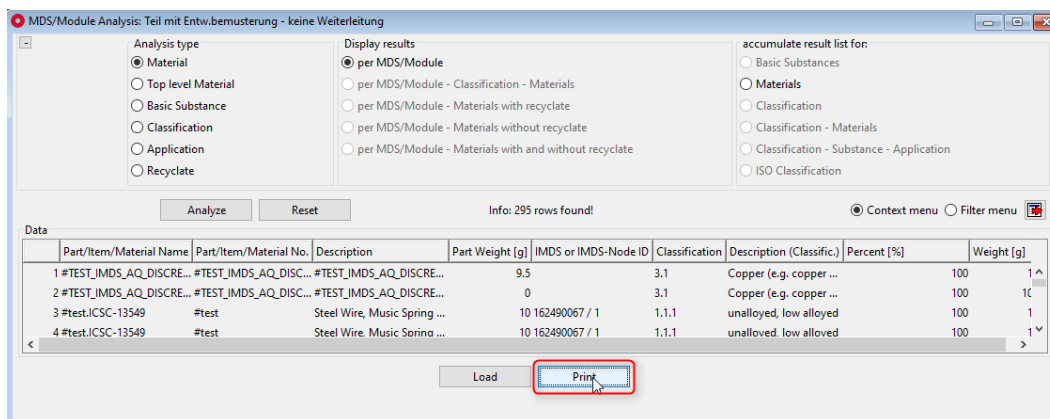
Ingredients						
-Layer- Name	Part-/ Item-/ Material/ Cas- No.	Weight / Portion	Quantity (part)	VDA / GADSL / SVHC	PPM / Recyclate / Application	
-1- 100 Cr 2		20 g		1.12 / /	/ No /	
-2- Carbon	7440-44-0	1.025 (0.95-1.1) %		/ - / No	/ /	
-2- Chromium	7440-47-3	1.5 (1.35-1.65) %		/ - / No	/ /	
-2- Iron	7439-89-6	96.895 %		/ - / No	/ /	
-2- Manganese	7439-96-5	0.3 (0.15-0.45) %		/ - / No	/ /	
-2- Phosphorus	7723-14-0	0.015 (0-0.03) %		/ - / No	/ /	
-2- Sulphur	7704-34-9	0.015 (0-0.03) %		/ - / No	/ /	
-2- Silicon	7440-21-3	0.25 (0.1-0.4) %		/ - / No	/ /	
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Figure 99 Print report

13.2 Printing an MDS/module analysis report

When you are using the analysis function, you have the ability to use the print function to generate a .pdf file of the results. You will have the option to “Save” the file to your local/network drive or “Print” the .pdf file (local/network printer must be connected/installed)



MDS/Module Analysis: Teil mit Entw.bemusterung - keine Weiterleitung

Analysis type: ☒ Material

Display results: ☒ per MDS/Module

accumulate result list for: ☐ Basic Substances

☐ Materials

☐ Classification

☐ Classification - Materials

☐ Classification - Substance - Application

☐ ISO Classification

Analyze Reset Info: 295 rows found! Context menu Filter menu

Part/Item/Material Name	Part/Item/Material No.	Description	Part Weight [g]	IMDS or IMDS-Node ID	Classification	Description (Classific.)	Percent [%]	Weight [g]
1 #TEST_IMDS_AQ_DISCRE...	#TEST_IMDS_AQ_DISCRE...	#TEST_IMDS_AQ_DISCRE...	9.5	3.1		Copper (e.g. copper ...	100	1
2 #TEST_IMDS_AQ_DISCRE...	#TEST_IMDS_AQ_DISCRE...	#TEST_IMDS_AQ_DISCRE...	0	3.1		Copper (e.g. copper ...	100	1
3 #test.ICSC-13549	#test	Steel Wire, Music Spring ...	10 162490067 / 1	1.1.1		unalloyed, low alloyed	100	1
4 #test.ICSC-13549	#test	Steel Wire, Music Spring ...	10 162490067 / 1	1.1.1		unalloyed, low alloyed	100	1

Load Print

Figure 100 Print the MDS/module analysis report

In order to print, a report select, the "Print" button. The selected report is converted into a .pdf file. A print preview window will open to enable you to review the .pdf file. You will have the option to "Save" the file to your local/network drive or "Print" the .pdf file (local/network printer must be connected/installed)

Print preview

Search criteria: External MDS: Yes, accepted; Own MDS: Yes; Own modules: Yes; Status: Active; current Version: Yes
 Analysis criteria: Recycle; Display results: accumulate result list for: per MDS/Module - Materials with recycle
 Date: 2016/06/22
 Time: 01:57:36 PM
 User: [redacted]

MDS/Module Analysis - Recycle

Part-/Item-/Material No.	MatName	Tradename	IMDS-ID	Classification	Weight [g]	Recycle contained	Post Industrial Recycle (from) [%]	Post Industrial Recycle (to) [%]	Post Consumer Recycle (from) [%]	Post Consumer Recycle (to) [%]
CW003A	Kopie_Cu-ETP 1			3.1	5.000000	Yes	1.000000	2.000000	3.000000	4.000000
	06Cr19Ni10 (Stainless Steel)			1.1.2	45.000000	Yes	10.000000	20.000000	10.000000	20.000000
CW003A	Kopie_Cu-ETP 1			3.1	10.000000	Yes	1.000000	2.000000	3.000000	4.000000
	Aluminium Bronze (CA642)			3.2	5.000000	Yes	0.000000	3.000000	0.000000	4.000000
	Aluminium Bronze (CA642)			3.2	525.000000	Yes	0.000000	3.000000	0.000000	4.000000
	Aluminium Bronze (CA642)			3.2	525.000000	Yes	0.000000	3.000000	0.000000	4.000000
test publish material	ABS			5.1.b	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
	ProtMat 5.1.a filled Thermoplastics			5.1.a	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
test publish material	ABS			5.1.b	200.000000	Yes	0.000000	10.000000	0.000000	10.000000

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Figure 101 Print the MDS/module analysis report

PLEASE NOTE: It is not possible to print all report types, for those that are not possible, the "Print" button will be deactivated.

14 Analysis

The Analysis processes are accessed using the 'analysis'  button

For users that have the licenced VP module (optional) more options are available (see related user manual)

When accessing this menu, a template opens, where you can select the different types of analysis you want to perform. These can be actioned by selecting the corresponding radio button or tab.

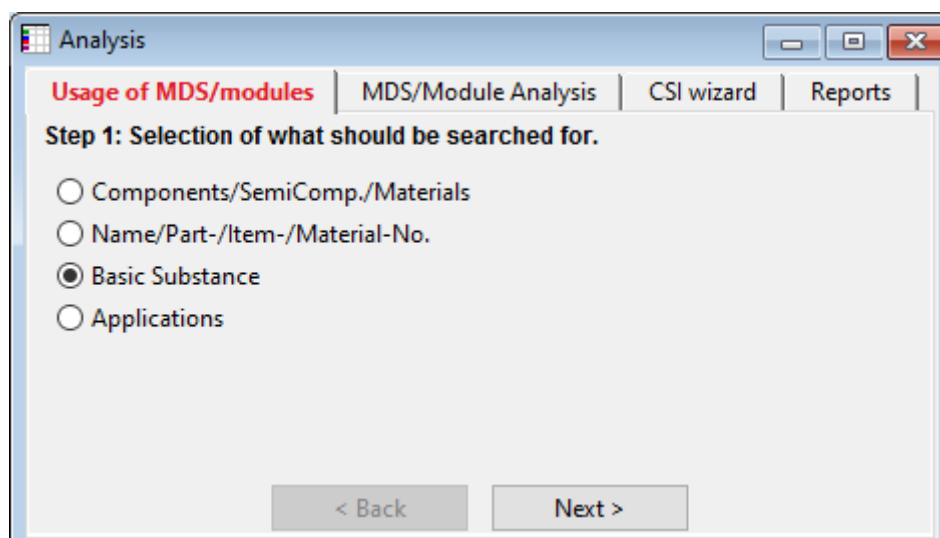
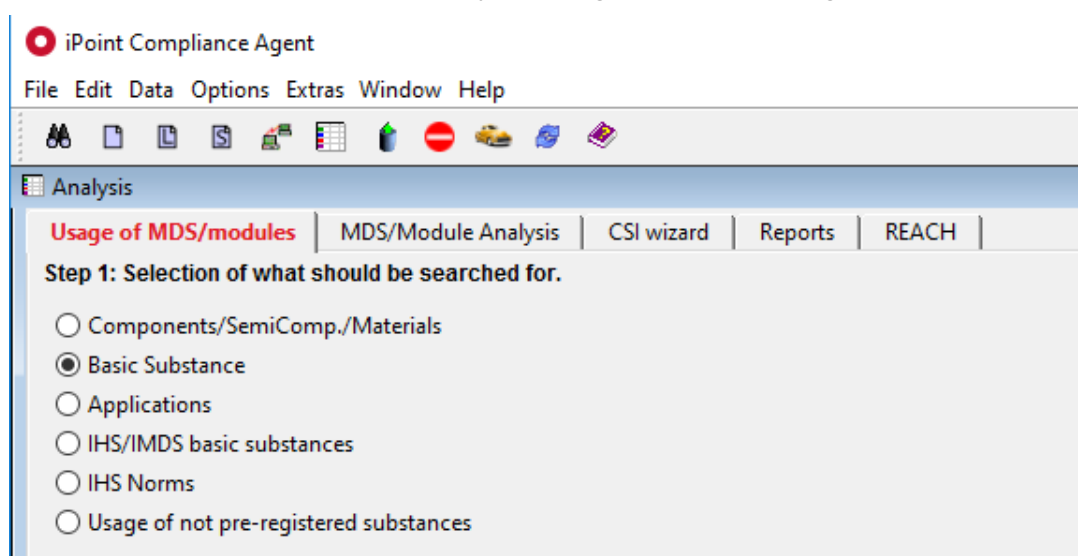


Figure 102 Analysis options

14.1 Usage of MDS/modules

14.1.1 General

“Usage of MDS/modules” allows you to analyse your own and/or received MDS/modules for various information. The function can be used to identify specific issues by searching for a specific data type, identifying the specific data of interest, identifying the data to analyse and providing you with a report based on your inputs.

The processes are divided into 4 basic steps:

- **Step 1**
Select the item type that you want to search for (i.e. Component/Semi Comp./Materials, Basic substance, Applications etc.)
- **Step 2**
Select the specific items that you want to search for (i.e. part/s, substance/s, application code/s etc.)
- **Step 3**
Select the MDS/modules that you want to be analysed (i.e. All “External” “Accepted” datasheets, etc.)
- **Step 4**
Start the usage report. Generate the results.

Using the “Next” button, the user will be guided from step to step. To change the inputs from a previous entry, the user can return to the previous page using the “Back” button.

To optimize the display and processing of the usage list, several configuration parameters are available, see chapter 33.3 “Administrating the application”

The number of rows in the result can be controlled by the value set for the configuration parameter **“USAGE_LIST_UP_MAX_ROWS”**.

14.1.2 Define the item type

In the first step, the user has to define the item type (node type).

What do you want to search for?

- Components/SemiComponents/Materials
- Name/Part-/Item-/Material-No. (optional)
- Basic substances
- Applications
- IHS/IMDS basic substances (optional)
- IHS Norms (optional)
- Usage of not pre-registered substances (optional)

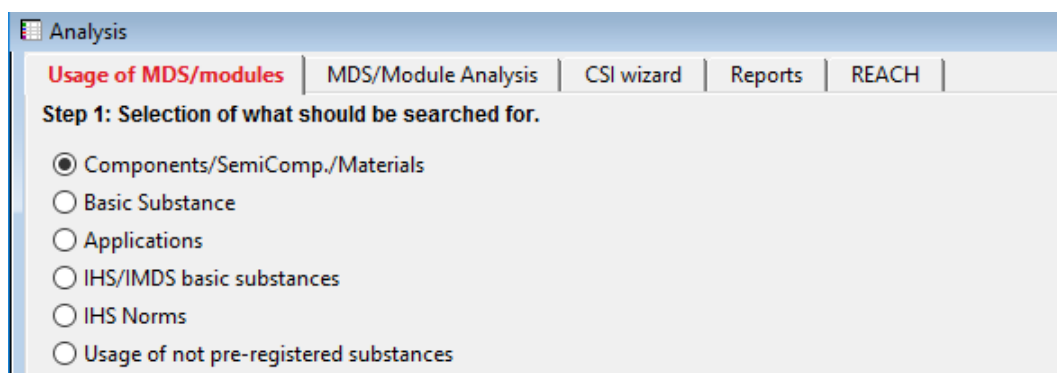


Figure 103 Define the item type for the usage report

Selecting “Next” will take you to the next step in the process.

14.1.3 Select MDS/module, basic substances or applications

14.1.3.1 Search for MDS/module, basic substances or applications

Depending on the selection in step 1, the user has to search and select the specific information of interest.

What is being searched for, (i.e. Part/MDS/module, basic substance or applications etc.).

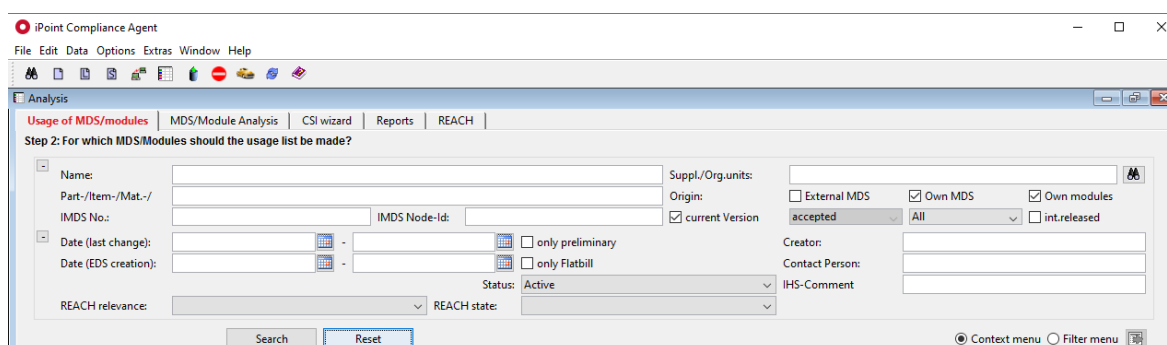


Figure 104 Available search criteria for MDS/modules

Enter information in the appropriate field or field combinations to generate the required list. If no qualifying information is entered, all “Own MDS” and “Own modules” will be listed as a default.

The search is started from the “Search” button.

All MDS/module, that match the search criteria, will be listed.

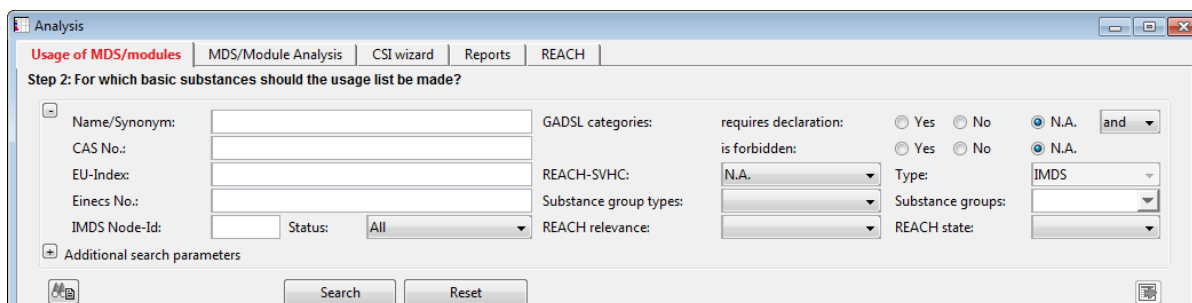


Figure 105 Available search criteria for basic substances

Enter information in the appropriate field or field combinations to generate the required list. If no qualifying information is entered, all basic substances will be listed.

The search is started from the **“Search”** button.

All substances, that match the search criteria, will be listed.

PLEASE NOTE: The search for substance in this panel is set to search for all substances, not only for active, as is the case in other substance search panels. This is to ensure that all substances, not only active ones, are found and returned.

From the results list, at least one row must be selected, to continue, select the **“Next”** button.

One or more entries can be selected.

- **Select selective entries**
Holding down the <ctrl> key while selecting rows with your mouse button, the identified rows will be selected or deselected.
- **Select all entries**
After selecting one row, using the “<ctrl> key and A” will select the whole list.
- **Select a group of entries**
After selecting the first row in the group, using the <shift> key, select the last row in the group with the mouse button.

Hint: When searching for basic substances, if a substance group, is to be used, the “substance group type” must be identified first. If selecting, a “substance group type” with the selection of “substance groups” “all”, all, basic substances, of all the substance groups, in all the versions associated to the selected “substance group type” will be searched.

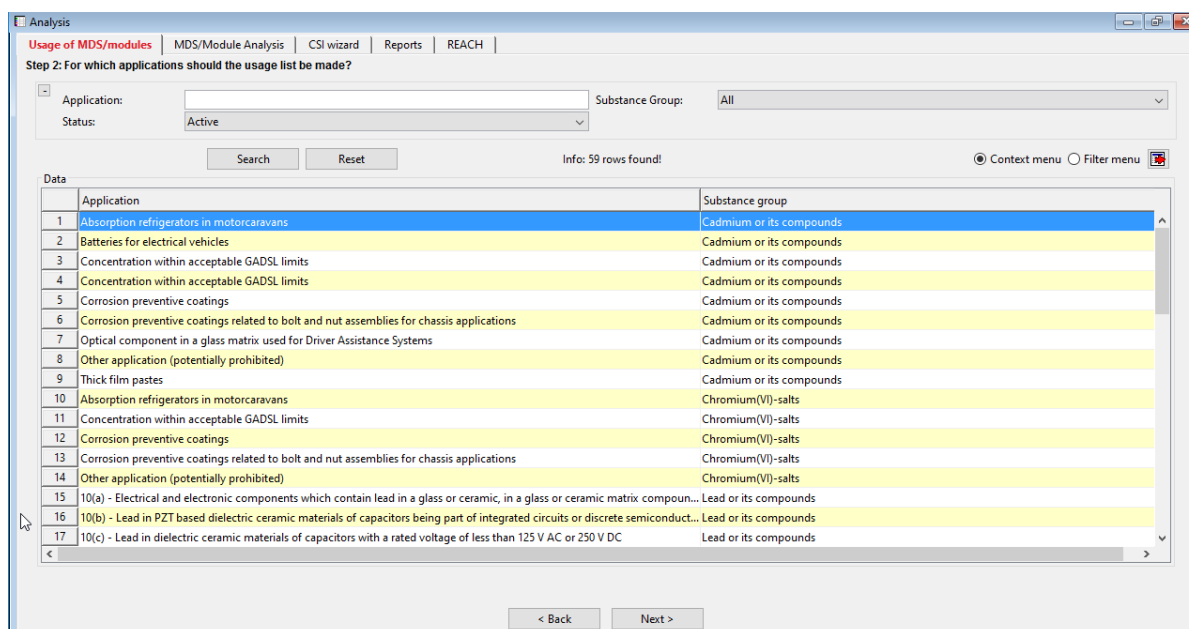


Figure 106 Available search criteria for application codes

The search is started from the search button.

One or more entries can be selected.

- **Select selective entries**
Holding down the <ctrl> key while selecting rows with your mouse button, the identified rows will be selected or deselected.
- **Select all entries**
After selecting one row, using the “<ctrl> key and A” will select the whole list.
- **Select a group of entries**
After selecting the first row in the group, using the <shift> key, select the last row in the group with the mouse button.

14.1.3.2 Optional: Search for Name/Part-/Item-/Material

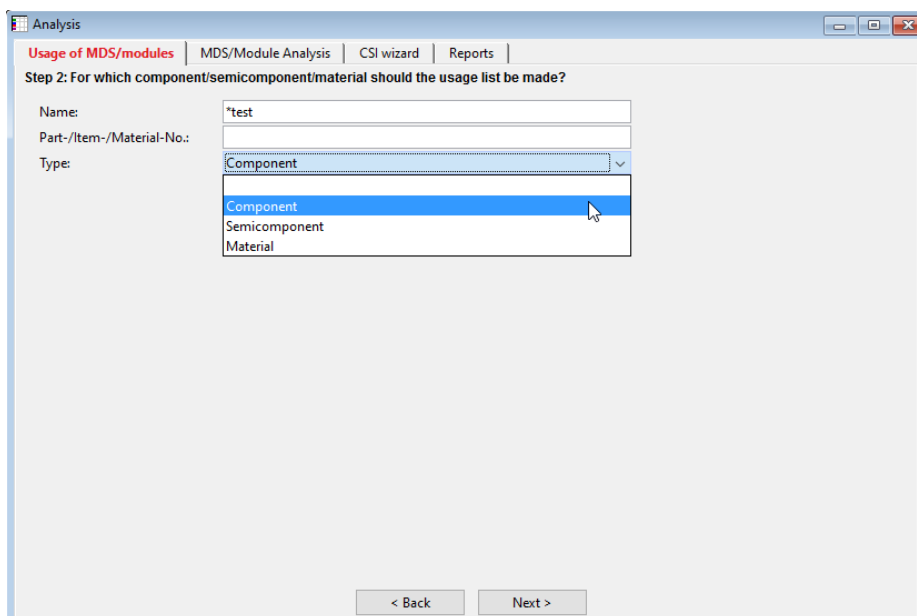


Figure 107 Available search criteria for Name/Part-/Item-/Material

Select the data type of your search from the options available in the dropdown list. If nothing is selected, all, data types will be considered.

Enter “Name” or Part-/item_/Material-no. Information into the appropriate field, * wild cards can be used.

Select “Next”

You **MUST** enter qualifying information into the “Name” or Part-/item-/Material-no. field, even if it’s only a single character or a combination of characters or a * wild card to be able to continue.

ATTENTION: Please be advised, entering only a * wild card on its own, can take some time, as the system will search for all MDS/Modules of the selected “Type” identified in the dropdown menu if populated.

By clicking “Next” the same search dialogue will be visible as in step 3 as with the search for MDS/modules.

ATTENTION: Because it is possible to search for simple nodes, the amount of data found, for this “Search for” can be extensive.

Therefore, the following restrictions apply:

- No search will be allowed for multiple entries (separated by semicolon), only one entry in the search fields will be evaluated
- No support of multiple item numbers (Module MNS if licenced)
- The result set of the usage decision will be restricted to a specific amount of found top level nodes.

14.1.4 Select the MDS/modules to be searched

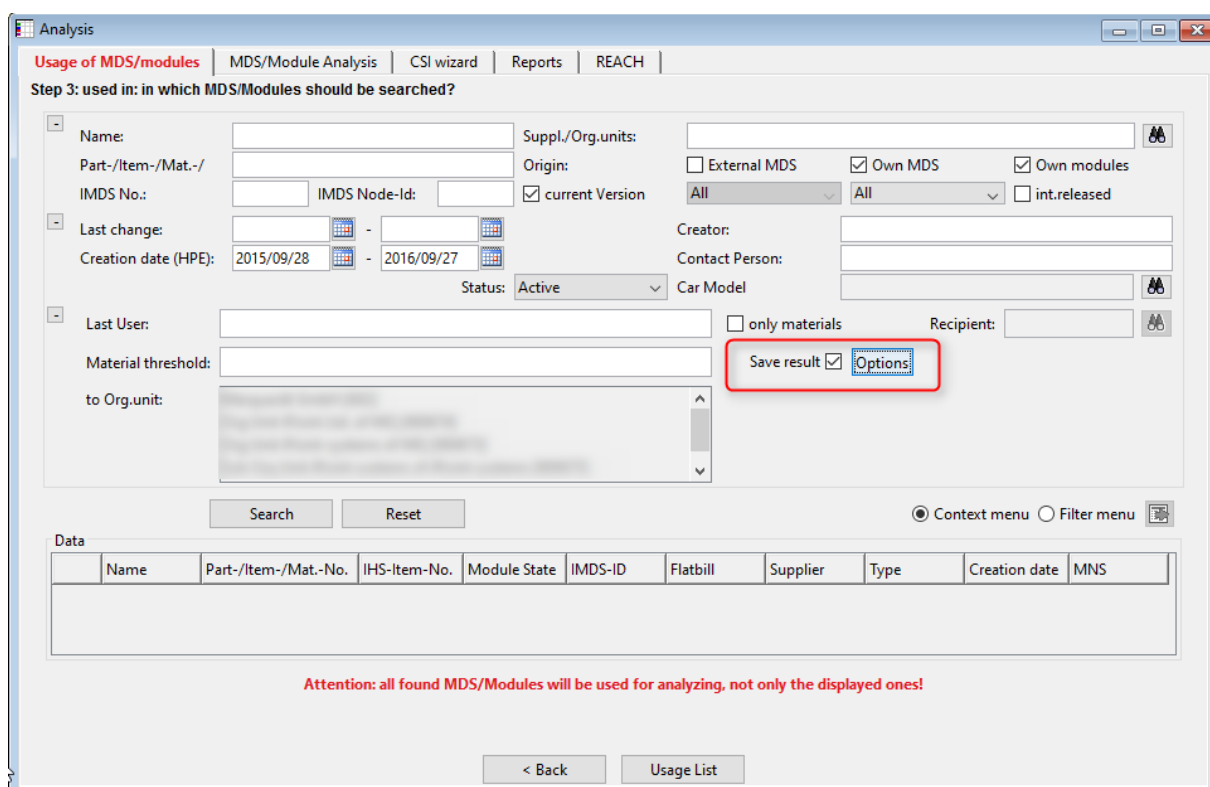
Step 3

In this step, the user has to select the MDS/modules that should be searched for references.

What data do you want to analyse?

There are various options available (i.e. Name, Part-/item-/Mat.-/ IMDS No. IMDDS Node id or select modules from a specific supplier (Suppl./Org unit), Own MDS and Own modules, All “External” Accepted etc..

Note: If entering Part-/item-/Mat.-/ using semicolon separated values (i.e.. 12345678;23456789 etc..), this is restricted to a maximum limit of 500 arguments. If you enter more arguments that exceed this limit, you will receive an “Error message” informing you the limit has been exceeded.



Analysis

Usage of MDS/modules | MDS/Module Analysis | CSI wizard | Reports | REACH

Step 3: used in: in which MDS/Modules should be searched?

Name: Suppl./Org.units:

Part-/item-/Mat.-/ Origin: ☐ External MDS ☒ Own MDS ☒ Own modules

IMDS No.: IMDS Node-Id: ☒ current Version All All ☐ int.released

Last change: - Creator:

Creation date (HPE): 2015/09/28 - 2016/09/27 Contact Person:

Status: Active Car Model:

Last User: ☐ only materials Recipient:

Material threshold: Save result ☒ Options

to Org.unit:

Search Reset

Context menu Filter menu

Name	Part-/item-/Mat.-No.	IHS-Item-No.	Module State	IMDS-ID	Flatbill	Supplier	Type	Creation date	MNS

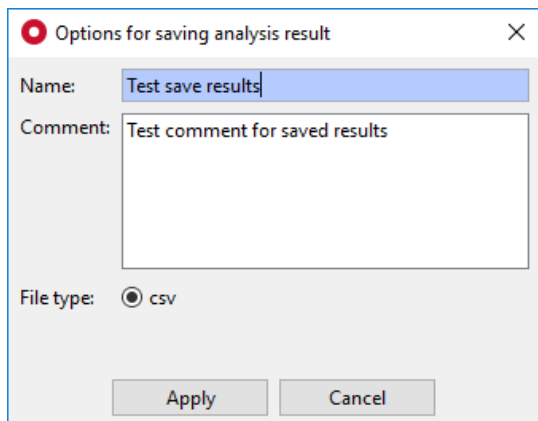
Attention: all found MDS/Modules will be used for analyzing, not only the displayed ones!

< Back Usage List

Figure 108 Definition of the data to be searched and save option

Save Results

- The selection of “**Save result**” check box and click on the “**Options**” button will open a dialogue box that will allow you to save the results with a user defined name. Enter a Name for the related job/results with an appropriate comment, if appropriate.
- This option is available for usage analysis for basic substances and usage analysis for application codes



Options for saving analysis result

Name: Test save results

Comment: Test comment for saved results

File type: ☒ csv

Apply Cancel

Figure 109 Save results and add comment

The name is limited to 46 characters. If a longer text is entered, an error message is displayed, and the entered text is truncated.

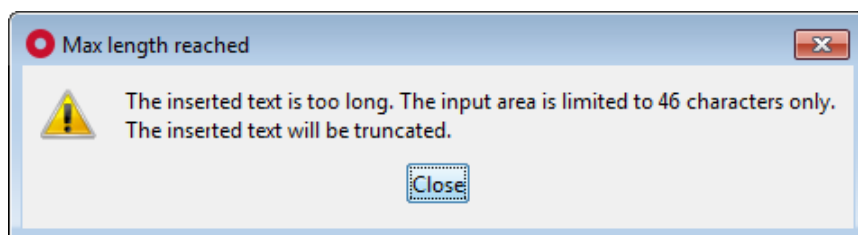
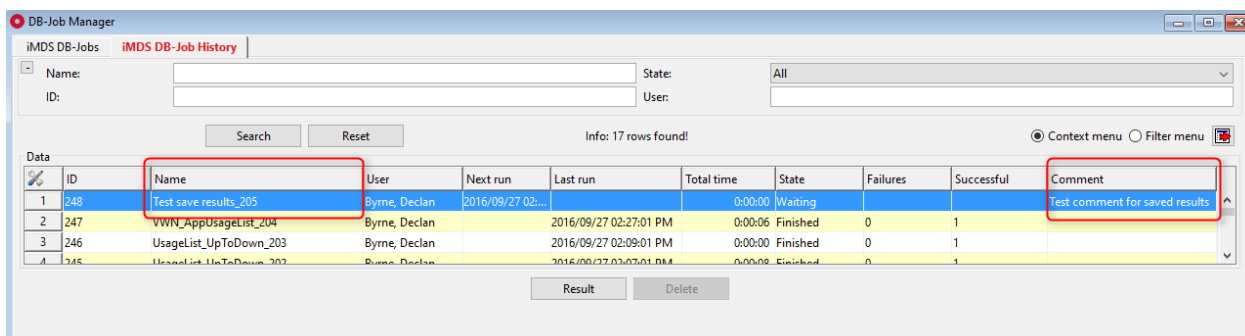


Figure 110 Error message informing user that too long analysis job name was entered

This name and related comment will be reflected in the DB Job Manager history and can be used to save/find the results easier with a more meaningful name and comment.



DB-Job Manager

iMDS DB-Jobs iMDS DB-Job History

Name: ID: State: All User:

Search Reset Info: 17 rows found! Context menu Filter menu

ID	Name	User	Next run	Last run	Total time	State	Failures	Successful	Comment
1	Test save results_205	Byrne, Declan	2016/09/27 02:...		0:00:00	Waiting			Test comment for saved results
2	VWVW_AppUsageList_204	Byrne, Declan		2016/09/27 02:27:01 PM	0:00:06	Finished	0	1	
3	UsageList_UpToDown_203	Byrne, Declan		2016/09/27 02:09:01 PM	0:00:00	Finished	0	1	
4	UsageList_UpToDown_202	Byrne, Declan		2016/09/27 03:07:01 PM	0:00:08	Finished	0	1	

Result Delete

Figure 111 DB Job Manager History

Attention: The criteria “Material threshold” is only available, if the item “type” selected in step one was defined as “basic substance”. In this case the system will return searches for the identified basic substance/s that are equal to or exceeds the qualifying value entered. This is calculated as either a “fix”ed

value, a percentage (“from” -“to” if ranges) or “Rest” in the homogenous material. The results will only list substances if they are present that have a threshold either greater or equal to the given value.

The criteria “Recipient” is only available for your own MDS’s. The value will be searched within the name of the company or organisation unit as the recipient of an MDS.

The criteria “To Org unit” is only available to organisations that have more than one company defined as a recipient of MDS’s.

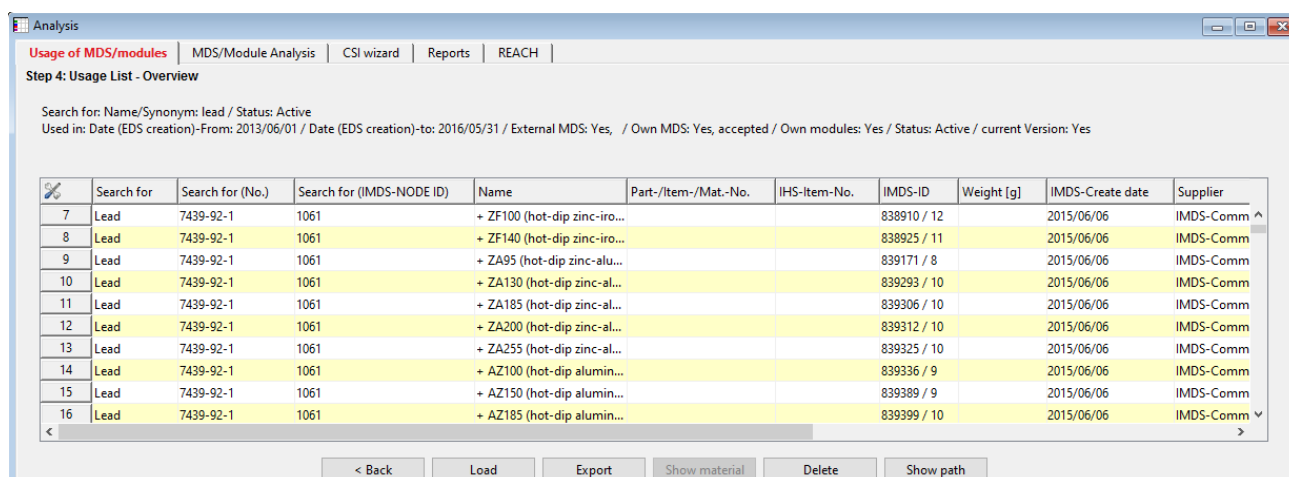
The criteria “Car Model” is only available, if the respective module is licensed, and the user has the appropriate permission to search for car models. If this criterion has been entered, the supplier MDS’s of the selected car model will be analysed. A “Car Model” can only be selected by searching, using the spyglass button.

From the result list, one or more entries can be selected.

Using the button “Usage List”

Step 4.

Depending on the amount of data being analysed and your company settings, the results will either be displayed in the results window (less than 2500 results (Default)) or a batch job will be created and run as background process (2500 results or more)



	Search for	Search for (No.)	Search for (IMDS-NODE ID)	Name	Part-/Item-/Mat.-No.	IHS-Item-No.	IMDS-ID	Weight [g]	IMDS-Create date	Supplier
7	Lead	7439-92-1	1061	+ ZF100 (hot-dip zinc-iro...			838910 / 12		2015/06/06	IMDS-Comm ^
8	Lead	7439-92-1	1061	+ ZF140 (hot-dip zinc-iro...			838925 / 11		2015/06/06	IMDS-Comm
9	Lead	7439-92-1	1061	+ ZA95 (hot-dip zinc-alu...			839171 / 8		2015/06/06	IMDS-Comm
10	Lead	7439-92-1	1061	+ ZA130 (hot-dip zinc-al...			839293 / 10		2015/06/06	IMDS-Comm
11	Lead	7439-92-1	1061	+ ZA185 (hot-dip zinc-al...			839306 / 10		2015/06/06	IMDS-Comm
12	Lead	7439-92-1	1061	+ ZA200 (hot-dip zinc-al...			839312 / 10		2015/06/06	IMDS-Comm
13	Lead	7439-92-1	1061	+ ZA255 (hot-dip zinc-al...			839325 / 10		2015/06/06	IMDS-Comm
14	Lead	7439-92-1	1061	+ AZ100 (hot-dip alumin...			839336 / 9		2015/06/06	IMDS-Comm
15	Lead	7439-92-1	1061	+ AZ150 (hot-dip alumin...			839389 / 9		2015/06/06	IMDS-Comm
16	Lead	7439-92-1	1061	+ AZ185 (hot-dip alumin...			839399 / 10		2015/06/06	IMDS-Comm v

Figure 112 Analysis results options

Hint: If the search from step 3 found more than 2500 entries, and if the user has selected all entries, the system will ask the user if they want to integrate the other entries also into the report.

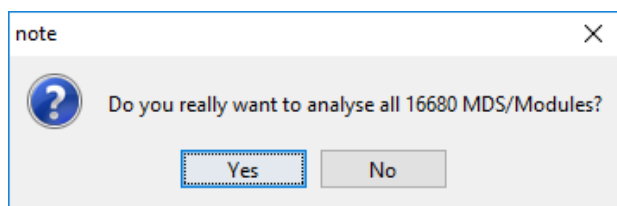


Figure 113 Include more MDS/modules

Select “Yes” to include the additional MDS/modules for analysis or “No” to continue with the 2500 items selected from the list

Depending on the selected usage analysis type, and the selected options, the system configuration, and the modules licensed, a dialog may appear, asking if the analysis should be processed by a background job (see e.g. parameter VANALYZE_SEARCHIN_MAXROWS in chapter 33.3 “Administrating the application”).

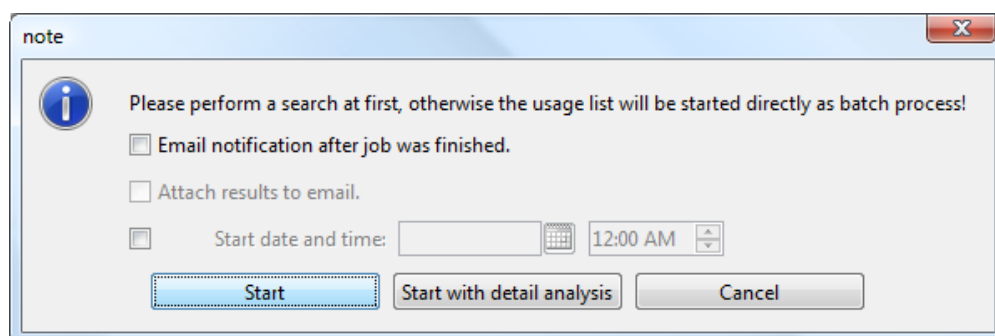


Figure 114 Analysis notification

If a background process is to be started, you will be presented with options.

The option for “start with detail analysis” is only available if your selection in step 1 was basic substance.

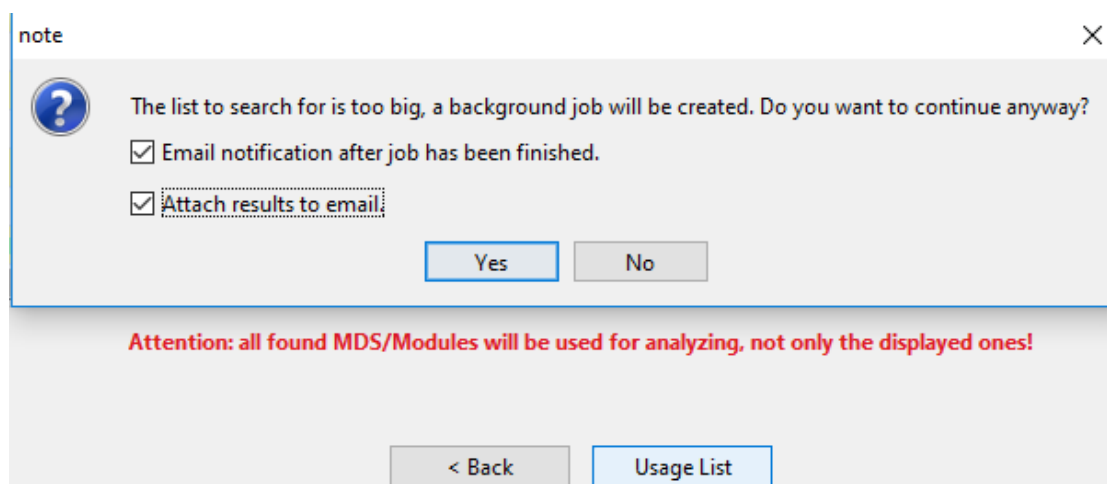


Figure 115 Example of question regarding background processing of the usage list

The following options are available:

- **Email notification after job was finished (optional)**
The user can get an email notification after the background process has finished
- **Attach results to email (optional)**
Only available together with selection of “Email notification” - the result file will be attached to the email

- **Start date and time (optional)**

Allows the user to define the earliest start date and time for the usage analysis background job to be executed. If this option is not selected or a time in the past is chosen, the background job will be added to the job queue and executed at the next available date/time

- **Start**

To start the usage analysis background job with the selected options.

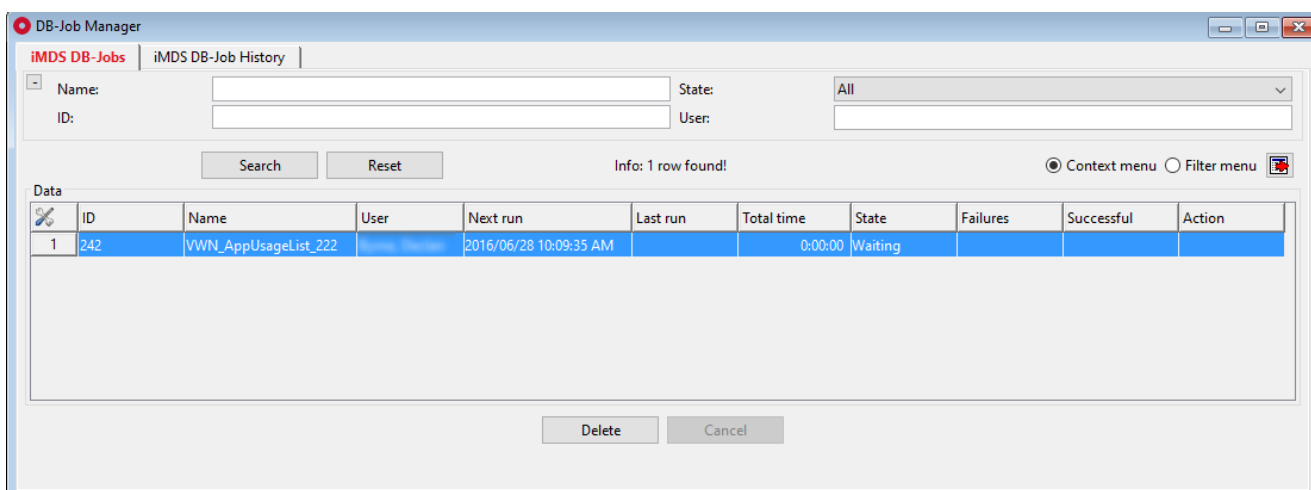
- **Start with detail analysis**

If detail analysis is available (see below) this option is additionally visible – if selected, the result list will be extended, to a detailed list.

- **Cancel**

If “Cancel” is selected the process is interrupted, and modifications can be made to your input criteria.

The status and the result of this process can be tracked in the Job administration (Menu → Extras → DB Job Manager) and the result can be exported when the background job has finished. However, for this action the user needs the appropriate permissions Admin_Jobs for the group iMDS_ADMIN.



The screenshot shows the 'DB-Job Manager' window. It has two tabs: 'iMDS DB-Jobs' (selected) and 'iMDS DB-Job History'. Below the tabs are input fields for 'Name:', 'ID:', 'State:', and 'User:'. There are 'Search' and 'Reset' buttons. Below these is a table with the following data:

ID	Name	User	Next run	Last run	Total time	State	Failures	Successful	Action
242	VWN_AppUsageList_222		2016/06/28 10:09:35 AM		0:00:00	Waiting			

Below the table are 'Delete' and 'Cancel' buttons. The status bar at the bottom indicates 'Info: 1 row found!'.

Figure 116 Information about the background job

14.1.5 Result of the usage report

Depending on the item type selected at step 1. The results of the analysis will be displayed, if a reference was found.

14.1.5.1 Usage analysis for components/semicomponents/materials

The columns displayed in the result from usage analysis for components/semicomponents/materials done in the iPCA client or via DB job are as follows:

- **MDS/module name (from Step 2)**

MDS/module name of component/semicomponent/material found in the analysed MDS/module.

- **MDS/module Part-/Item-/Mat.-No. (from Step 2)**
Part-/Item-/Mat.-No. of component/semicomponent/material found in the analysed MDS/module.
- **MDS/module IMDS ID / Version (from Step 2)**
IMDS ID / Version of component/semicomponent/material found in the analysed MDS/module.
- **MDS/module name**
MDS/module name of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS/module Part-/Item-/Mat.-No.**
Part-/Item-/Mat.-No. of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS/module IHS Item No.**
IHS Item No. of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS/module IMDS ID / Version**
IMDS ID / Version of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS/module Measured Weight [g]**
Measured weight of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS/module create date in IMDS**
IMDS create date of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS supplier**
Supplier of analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS recipient**
Recipient in the analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS recipient status**
Recipient status in the analysed MDS/module in which the found component/semicomponent/material is present.
- **MDS supplier code**
Supplier code in the analysed MDS/module in which the found component/semicomponent/material is present.

The columns displayed in the result from standard usage analysis for components/semicomponents/materials done via the DB job are as follows:

- **Search for**
MDS/module name of component/semicomponent/material found in the analysed MDS/module.
- **Search for (No.)**
Part-/Item-/Mat.-No. of component/semicomponent/material found in the analysed MDS/module.
- **Search for (IMDS-ID)**
IMDS ID / Version of component/semicomponent/material found in the analysed MDS/module.
- **Name**
MDS/module name of analysed MDS/module in which the found component/semicomponent/material is present.
- **Part-/Item-/Mat.-No**
Part-/Item-/Mat.-No. of analysed MDS/module in which the found component/semicomponent/material is present.
- **IHS-Item-No.**
IHS Item No. of analysed MDS/module in which the found component/semicomponent/material is present.
- **IMDS-ID**
IMDS ID / Version of analysed MDS/module in which the found component/semicomponent/material is present.
- **Weight [g]**
Measured weight of analysed MDS/module in which the found component/semicomponent/material is present.
- **IMDS create date**
IMDS create date of analysed MDS/module in which the found component/semicomponent/material is present.
- **Supplier**
Supplier of analysed MDS/module in which the found component/semicomponent/material is present.
- **Recipient**
Recipient in the analysed MDS/module in which the found component/semicomponent/material is present.
- **State**
Recipient status in the analysed MDS/module in which the found component/semicomponent/material is present.
- **Suppl.code**
Supplier code in the analysed MDS/module in which the found component/semicomponent/material is present.

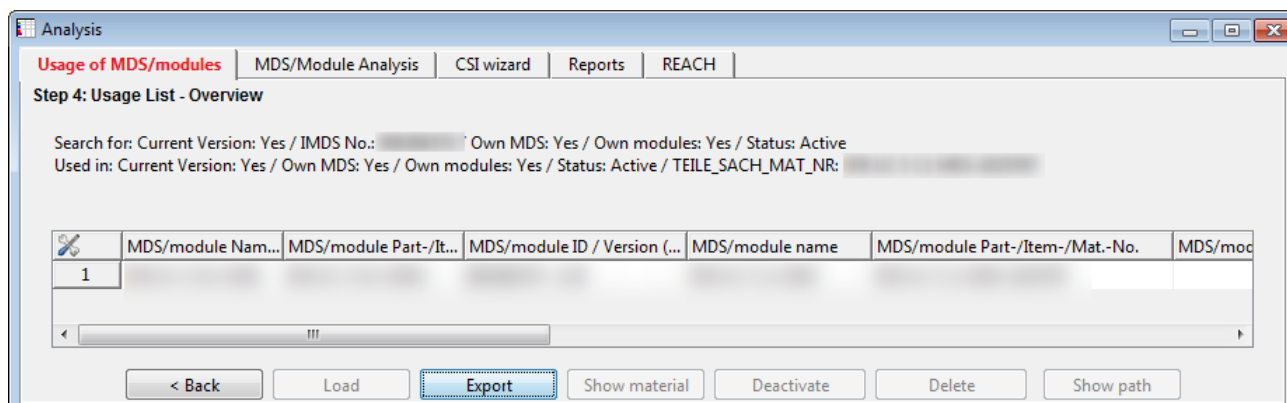


Figure 117 Results from usage analysis for components/semicomponents/materials

14.1.5.2 Usage analysis for basic substances

The columns displayed in the result from standard usage analysis for basic substances done in the iPCA client and via the DB job are as follows:

- **Substance name**
Name of the substance found in the material in analysed MDS/module.
- **Substance CAS No.**
CAS No. of the substance found in the material in analysed MDS/module.
- **Substance IMDS Node ID**
IMDS Node ID of the substance found in the material in analysed MDS/module.
- **Substance EU Index**
EU Index of the substance found in the material in analysed MDS/module.
- **Substance Einescs/Elincs**
Einescs/Elincs of the substance found in the material in analysed MDS/module.
- **Substance GADSL / SVHC**
GADSL / SVHC flag of the substance found in the material in analysed MDS/module.
- **MDS/module name**
MDS/module name of analysed MDS/module in which the found basic substance is present.
- **MDS/module Part-/Item-/Mat.-No.**
Part-/Item-/Mat.-No. of analysed MDS/module in which the found basic substance is present.
- **MDS/module IHS Item No.**
IHS Item No. of analysed MDS/module in which the found basic substance is present.
- **MDS/module IMDS ID / Version**
IMDS ID / Version of analysed MDS/module in which the found basic substance is present.

- **MDS/module Measured Weight [g]**
Measured weight of analysed MDS/module in which the found basic substance is present.
- **MDS/module create date in IMDS**
IMDS create date of analysed MDS/module in which the found basic substance is present.
- **MDS supplier**
Supplier of analysed MDS/module in which the found basic substance is present.
- **MDS recipient**
Recipient in the analysed MDS/module in which the found basic substance is present.
- **MDS recipient status**
Recipient status in the analysed MDS/module in which the found basic substance is present.
- **MDS supplier code**
Supplier code in the analysed MDS/module in which the found basic substance is present.

The columns displayed in the result from detailed usage analysis for basic substances (optional) done in the iPCA client and via the DB job are as follows:

- **Path to substance**
Path to the substance found in the material in analysed MDS/module.
- **MDS/module name**
MDS/module name of analysed MDS/module in which the found basic substance is present.
- **MDS/module Part-/Item-/Mat.-No.**
Part-/Item-/Mat.-No. of analysed MDS/module in which the found basic substance is present.
- **MDS/module IHS Item No.**
IHS Item No. of analysed MDS/module in which the found basic substance is present.
- **MDS/module IMDS ID / Version**
IMDS ID / Version of analysed MDS/module in which the found basic substance is present.
- **MDS/module Measured Weight [g]**
Measured weight of analysed MDS/module in which the found basic substance is present.
- **MDS/module create date in IMDS**
IMDS create date of analysed MDS/module in which the found basic substance is present.
- **MDS supplier**
Supplier of analysed MDS/module in which the found basic substance is present.
- **MDS recipient**
Recipient in the analysed MDS/module in which the found basic substance is present.
- **MDS recipient status**
Recipient status in the analysed MDS/module in which the found basic substance is present.

-
- **MDS supplier code**
Supplier code in the analysed MDS/module in which the found basic substance is present.
 - **Material Name**
Name of the material in which the found basic substance is present.
 - **Material classification**
Classification of the material in which the found basic substance is present
 - **Material IMDS ID / Version (IMDS node ID)**
IMDS ID / Version (or IMDS node ID) of the material in which the found basic substance is present
 - **Material weight [g]**
Material weight of the material in which the found basic substance is present
 - **Substance name**
Name of the substance found in the material in analysed MDS/module.
 - **Substance CAS No.**
CAS No. of the substance found in the material in analysed MDS/module.
 - **Substance EU Index**
EU Index of the substance found in the material in analysed MDS/module.
 - **Substance EINECS/ELINCS**
EINECS/ELINCS of the substance found in the material in analysed MDS/module.
 - **Substance GADSL / SVHC**
GADSL / SVHC flag of the substance found in the material in analysed MDS/module.
 - **Substance IMDS Node ID**
IMDS Node ID of the substance found in the material in analysed MDS/module.
 - **Substance portion - From [%]**
Substance portion (from) of the substance found in the material in analysed MDS/module.
 - **Substance portion - To [%]**
Substance portion (to) of the substance found in the material in analysed MDS/module.
 - **Substance portion - Average [%]**
Substance portion (average) of the substance found in the material in analysed MDS/module.
 - **Substance portion - Fix [%]**
Substance portion (fix) of the substance found in the material in analysed MDS/module.
 - **Substance portion - Rest [%]**
Substance portion (rest) of the substance found in the material in analysed MDS/module.
 - **Substance weight [g]**
Weight of the substance in the material in which it is present.
 - **Substance minimum weight [g]**
Minimum possible weight of the substance in the material in which it is present.

-
- **Substance maximum weight [g]**
Maximum possible weight of the substance in the material in which it is present.
 - **Substance share of part [%]**
Share of the substance in the analysed MDS/module.
 - **Substance share of part (minimum) [%]**
Minimum possible share of the substance found in the analysed MDS/module.
 - **Substance share of part (maximum) [%]**
Maximum possible share of the substance found in the analysed MDS/module.
 - **Substance share of material [%]**
Share of the substance in the material in which it is present.
 - **Substance share of material (minimum) [%]**
Minimum possible share of the substance in the material in which it is present
 - **Substance share of material (maximum) [%]**
Maximum possible share of the substance in the material in which it is present
 - **Total share of substance in part [%]**
Share of the substance in the analysed MDS/module.
 - **Total share of substance in part (minimum) [%]**
Minimum possible share of the substance in the analysed MDS/module.
 - **Total share of substance in part (maximum) [%]**
Maximum possible share of the substance in the analysed MDS/module.
 - **Total weight of substance in part [g]**
Summary of weights of all substance occurrences in the analysed MDS/module.
 - **Total weight of substance in part (minimum) [g]**
Summary of minimum possible weights of all substance occurrences in the analysed MDS/module.
 - **Total weight of substance in part (maximum) [g]**
Summary of maximum possible weights of all substance occurrences in the analysed MDS/module.

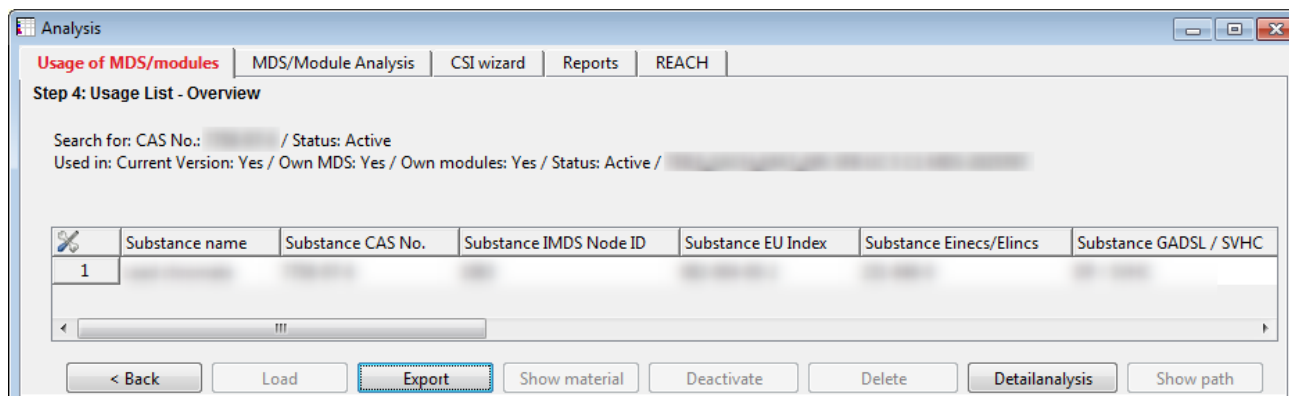


Figure 118 Results from usage analysis for basic substances

14.1.5.3 Usage analysis for application codes

The columns displayed in the result from usage analysis for application codes done in the iPCA client or via DB job are as follows:

- **Path to substance**
Path to the substance in the material in analysed MDS/module for which the application code selected for the analysis is set.
- **Material Name**
Name of the material in which the found application code is set.
- **Material Weight [g]**
Weight of the material in which the found application code is set.
- **Material Classification**
Classification of the material in for which the found application code is set.
- **Material IMDS ID / Version (IMDS node ID)**
Name of the material in for which the found application code is set.
- **Substance Application code**
Application code found in the material in analysed MDS/module.
- **Substance Name**
Substance in the material in analysed MDS/module for which the found application code is set.
- **Substance CAS No.**
CAS No. of the substance in the material in analysed MDS/module for which the found application code is set.
- **Substance IMDS Node ID**
IMDS node ID substance in the material in analysed MDS/module for which the found application code is set.

- **Substance Portion [%]**
Portion of the substance in the material in analysed MDS/module for which the found application code is set.
- **MDS/Module IMDS ID / Version**
IMDS ID / Version of analysed MDS/module in which the found application code is present.
- **MDS/Module Part-/Item-No.**
Part number of analysed MDS/module in which the found application code is present.
- **MDS/Module Name**
Weight of analysed MDS/module in which the found application code is present.
- **MDS/Module Measured Weight [g]**
Weigh of analysed MDS/module in which the found application code is present.
- **MDS/Module IMDS Create Date in IMDS**
IMDS creation date of analysed MDS/module in which the found application code is present.
- **MDS Supplier**
Supplier of analysed MDS/module in which the found application code is present.

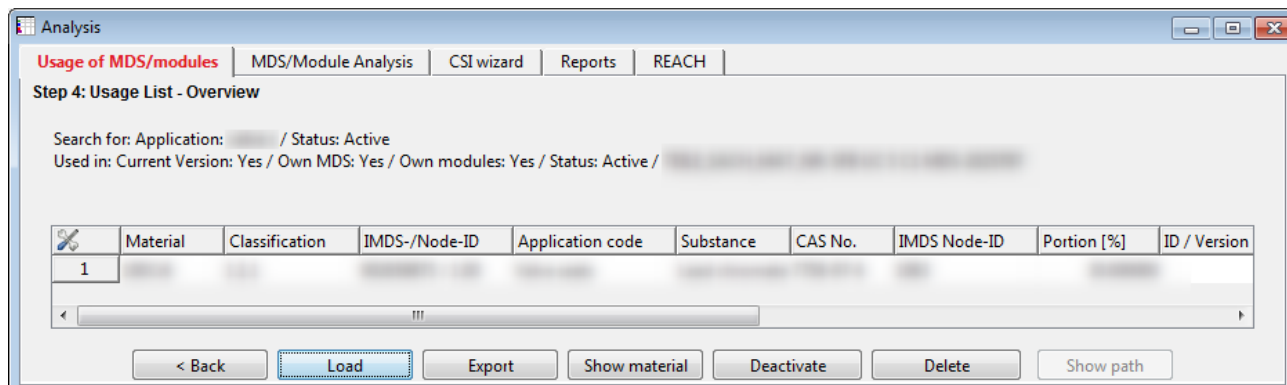


Figure 119 Results from usage analysis for application codes

The result list can be modified. Please refer to chapter “**Modification of the search result list**”. When clicking on name for example, all the entries for one specific MDS/module can be reordered and displayed continuously.

The display of the result list is limited by a configurable value; this is because of the memory usage of the application. If the amount of the results is greater than this value, a hint is displayed above the result list. The following data can be reloaded when the last row of the result list is selected and <Pg-Down> is clicked. With this action, new data is searched, which can last a specific time interval. The value for the result list is configurable by the parameter VANALYZE_MAXANZ (see chapter 33.3 “Administrating the application” starting on page 306).

14.1.6 Actions

The following actions are available:

- **Load**
By selecting the “**Load**” button, the MDS/module in the highlighted row can be shown and edited if possible and necessary.
The tree opens at those nodes which were searched for.
- **Export**
By selecting the “**Export**” button, you can export the complete list in to a .csv or .xls(x) file. A dialogue box will open, where you enter the filename and location to save the file.
- **Show material**
By selecting the “**Show material**” button, the MDS/module in the highlighted row can be loaded and edited if possible and necessary.
This button is enabled only in case of usage analysis for application codes.
- **Deactivate (optional)**
The selected entries will be “deactivated” (see **chapter 20**) and will not be found anymore within the searches.
- **Delete**
The selected entries will be deleted (see **chapter 7.4.4**).
- **Detailanalysis (optional)**
From the results list, of a basic substances analysis, an additional analysis option is available. By selecting “**Detailedanalysis**” button an extended result list will be displayed. The material analysis is performed per root node, and the substance occurrence within the corresponding materials is shown.
If no row is selected, the total overview results list will be used, and the analysis will be done for each unique root node. This shows the occurrence of those basic substances which are listed in the overview list.
The detailed analysis list comprises of additional information and shows more detailed material and basic substance information.
- **Show path**
By selecting the “**Show path**” button, the path to the identified MDS/module or basic substance will be opened.

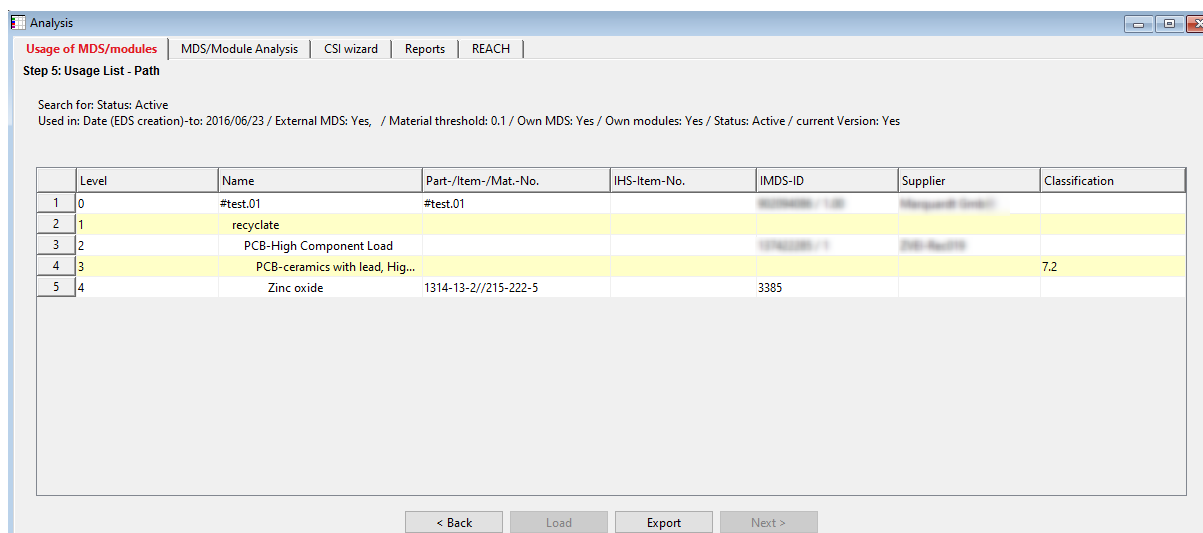


Figure 120 Using the “Back” button, the user returns to the result list.

14.2 MDS/module analysis

The MDS/module analysis can be invoked either using the main selection ‘Analysis’ or using the icon  when the structured tree view of a MDS/module is open.

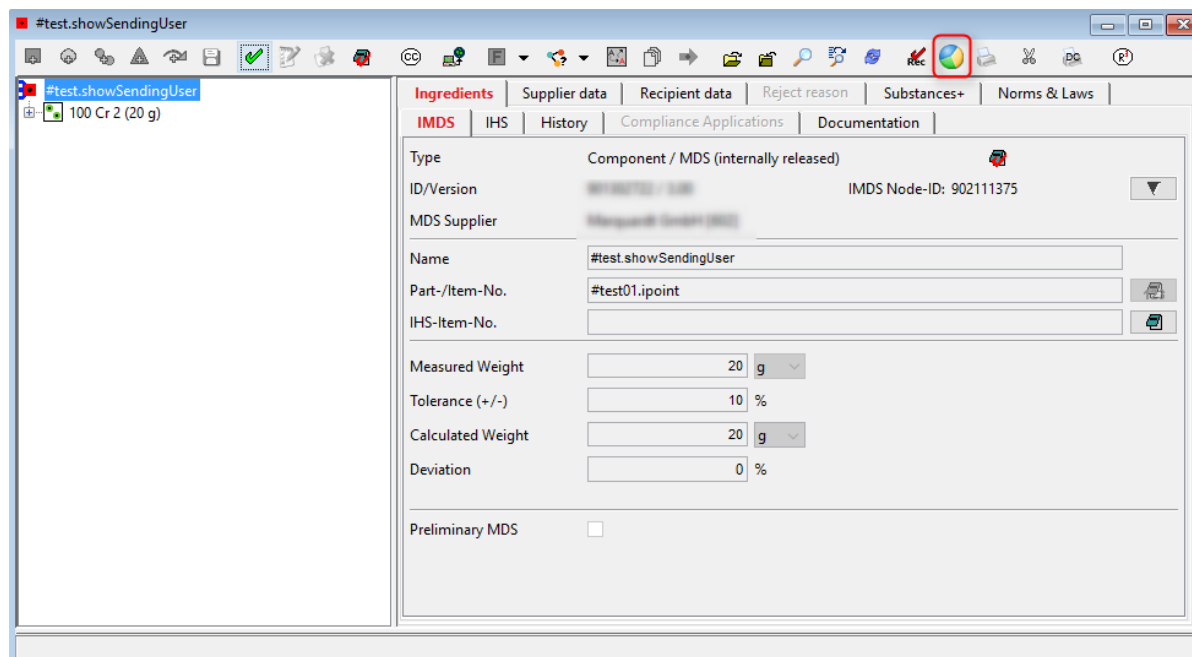


Figure 121 Analysis option

14.2.1 Overview

The iPCA has the feature to be able to analyse the ingredients/contents of one or more MDS/modules.

You can analyse:

- Material
- Top Level Material
- Substances
- Classifications
- Applications
- Recyclate (optional)

For each analysis, all occurrences (e.g. of substances) will be cumulated and calculated for the MDS/module. This means the percentage, and/or the weight value will be calculated.

Depending on the MDS/module content, weight and/or percentage values are available: if the MDS/module is a component, then both percentage and weight values are displayed, if they are semi components or materials, only percentage values are available as they have no weight.

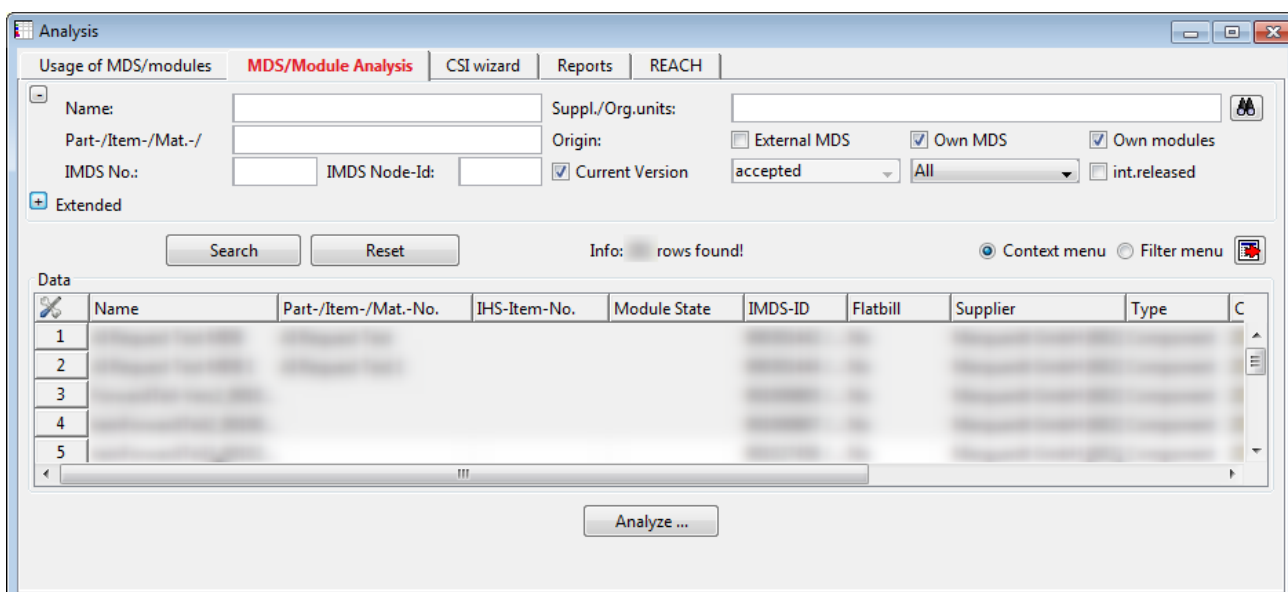
14.2.2 MDS/module selection

To open the search panel for the MDS/module analysis you must select the respective tab in the analysis panel.

Input your search criteria for the MDS/modules you want to analyse.

In the results part of the panel all the records will be listed that meet the search criteria.

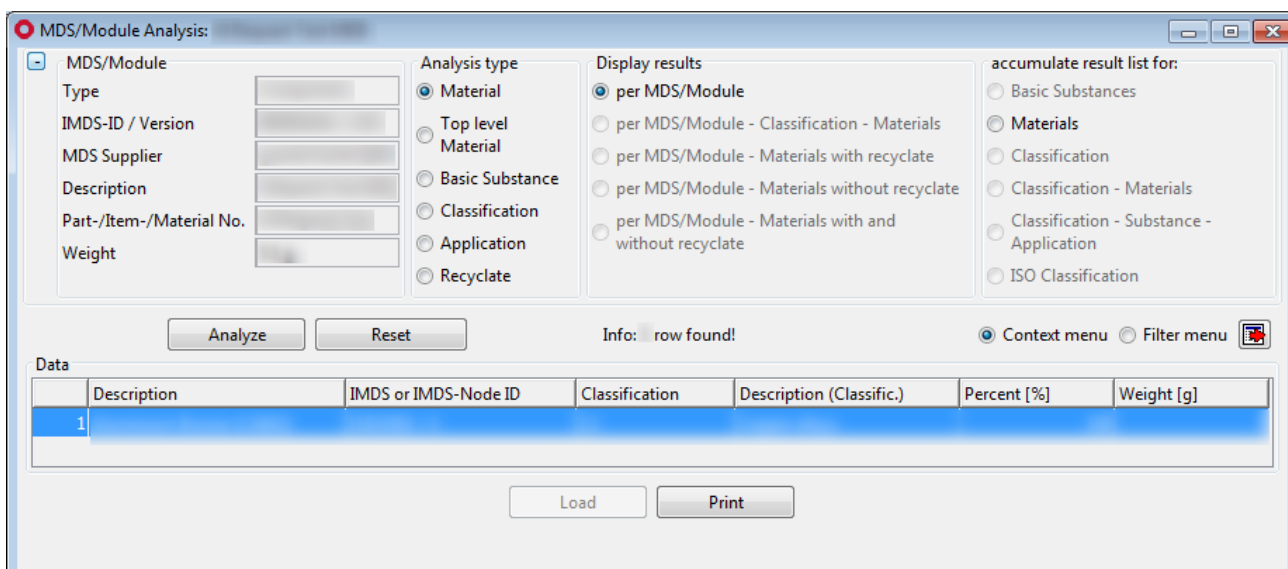
After selecting the desired data records (to select more than one record, the <ctrl> and <shift> keys can be used to select a from – to selection, the <ctrl> A will select all, the <ctrl> and mouse button will either select or deselect individual records) the MDS/module analysis panel will open by selecting the “Analyse” button.



The screenshot shows the 'Analysis' window with the 'MDS/Module Analysis' tab selected. The search criteria section includes fields for Name, Part-/Item-/Mat.-/, IMDS No., IMDS Node-Id, Suppl./Org.units, Origin, External MDS, Own MDS, Own modules, Current Version, accepted, All, and int.released. Below the search criteria are 'Search' and 'Reset' buttons. The results section shows a table with 5 rows of data. The table has columns: Name, Part-/Item-/Mat.-No., IHS-Item-No., Module State, IMDS-ID, Flatbill, Supplier, Type, and C. The 'Analyze ...' button is located at the bottom of the window.

Figure 122 MDS/module analysis - Selection of MDSs/modules

On the upper left-hand side of the panel is the information about the selected MDS/module (available if only a single MDS/module was selected). On the right-hand side, are the analysis option types that can be specified.



MDS/Module Analysis:

MDS/Module

Type:
IMDS-ID / Version:
MDS Supplier:
Description:
Part-/Item-/Material No.:
Weight:

Analysis type

☒ Material
☐ Top level Material
☐ Basic Substance
☐ Classification
☐ Application
☐ Recycle

Display results

☒ per MDS/Module
☐ per MDS/Module - Classification - Materials
☐ per MDS/Module - Materials with recycle
☐ per MDS/Module - Materials without recycle
☐ per MDS/Module - Materials with and without recycle

accumulate result list for:

☐ Basic Substances
☒ Materials
☐ Classification
☐ Classification - Materials
☐ Classification - Substance - Application
☐ ISO Classification

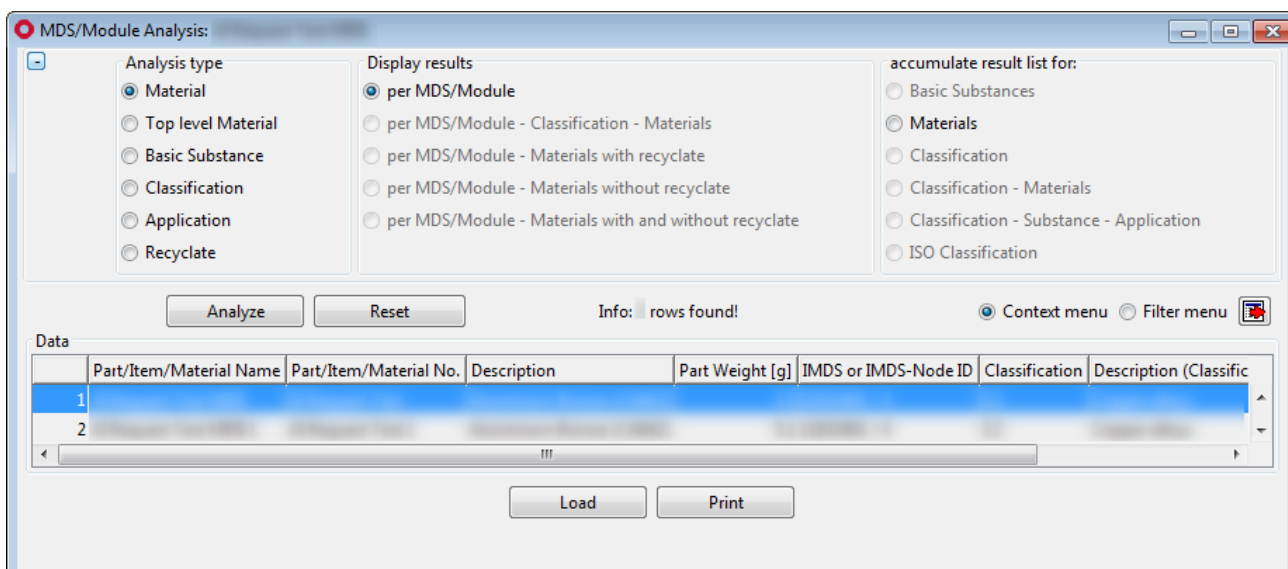
Analyze Reset Info: 1 row found! ☒ Context menu ☐ Filter menu

Data

	Description	IMDS or IMDS-Node ID	Classification	Description (Classific.)	Percent [%]	Weight [g]
1						

Load Print

Figure 123 MDS/module analysis - Selection analysis type and display of the result list for a single MDS/module



MDS/Module Analysis:

Analysis type

☒ Material
☐ Top level Material
☐ Basic Substance
☐ Classification
☐ Application
☐ Recycle

Display results

☒ per MDS/Module
☐ per MDS/Module - Classification - Materials
☐ per MDS/Module - Materials with recycle
☐ per MDS/Module - Materials without recycle
☐ per MDS/Module - Materials with and without recycle

accumulate result list for:

☐ Basic Substances
☒ Materials
☐ Classification
☐ Classification - Materials
☐ Classification - Substance - Application
☐ ISO Classification

Analyze Reset Info: 2 rows found! ☒ Context menu ☐ Filter menu

Data

	Part/Item/Material Name	Part/Item/Material No.	Description	Part Weight [g]	IMDS or IMDS-Node ID	Classification	Description (Classific.)
1							
2							

Load Print

Figure 124 MDS/module analysis - Selection analysis type and display of the result list for multiple MDS/modules

14.2.3 Selection of an Analysis

The following analysis types are available:

- **Material / Top level material**

The materials contained in a MDS/module, will be listed together with their weight or weight value. If there are materials contained in another material, and the option “**Material**” analysis is selected, the complex material is calculated to zero, only the materials that do not contain another material will be listed.

If the “**Top level Material**” analysis is selected, all materials beneath the top-level material will be ignored. For each material listed, the material ID will be listed, together with its name.

- **Basic Substance**

This analysis calculates all basic substances, that are contained in the MDS/module. Either the percentage and/or weight is calculated, as requested. If a substance occurs more than once, all weights/percentages will be added together.

Also, the GADSL/SVHC category of each basic substance will be determined and identified. This GADSL/SVHC category will be displayed as a single entry or a combination of either ‘D’ for declarable basic substances, ‘P’ for prohibited basic substances or SVHC for basic substance of very high concern.

- **Classification**

Materials are assigned to a classification. To find all the classifications occurring in a MDS/module, this analysis can be used. All classifications will be calculated and added together, if they occur more than once. The weight or percentage will be determined for each category.

Each VDA classification is mapped to an associated ISO classification, see below.

The mapping can be changed via “**Extras -> Master Data -> Classification**”.

ISO Classification	VDA Classifications
Metals	1. Steel and iron materials
	1.1 Steels / cast steel / sintered steel
	1.1.1 unalloyed, low alloyed
	1.1.2 highly alloyed
	1.2 Cast iron
	1.2.1 Cast iron with lamellar graphite / tempered cast iron
	1.2.2 Cast iron with nodular graphite / vermicular cast iron
	1.2.3 Highly alloyed cast iron
	2 Light alloys, cast and wrought alloys
	2.1 Aluminium and aluminium alloys
	2.1.1 Cast aluminium alloys
	2.1.2 Wrought aluminium alloys
	2.2 Magnesium and magnesium alloys
	2.2.1 Cast magnesium alloys
	2.2.2 Wrought magnesium alloys
	2.3 Titanium and titanium alloys
	3 Heavy metals, cast and wrought alloys
	3.1 Copper (e.g. copper amounts in cable harnesses)



ISO Classification	VDA Classifications
	3.2 Copper alloys 3.3 Zinc alloys 3.4 Nickel alloys 3.5 Lead 4 Special metals 4.1 Platinum / rhodium 4.2 Other special metals
Polymers	5. Polymer materials 5.1 Thermoplastics 5.1.a filled Thermoplastics 5.1.b unfilled Thermoplastics 5.4 Duromers 5.4.1 Polyurethane 5.4.2 Unsaturated polyester 5.4.3 Other duromers 5.5 Polymeric compounds (e.g. inseparable laminated trim parts) 5.5.1 Plastics (in polymeric compounds) 5.5.2 Textiles (in polymeric compounds) 6 Process polymers 6.1 Lacquers 6.2 Adhesives, sealants 6.3 Underseal
Elastomers	5.2 Thermoplastic elastomers 5.3 Elastomers / elastomeric compounds
MONM (Modified organic natural materials)	7.1 Modified organic natural materials (e.g. leather, wood, cardboard, cotton fleece)
Glass	7.2 Ceramics / glass
Other	7.3 Other compounds (e.g. friction linings) 8 Electronics / electrics 8.1 Electronics (e.g. pc boards, displays) 8.2 Electrics
Fluids	9 Fuels and auxiliary means 9.1 Fuels 9.2 Lubricants 9.3 Brake fluid 9.4 Coolant / other glycols 9.5 Refrigerant 9.6 Washing water, battery acids 9.7 Preservative 9.8 Other fuels and auxiliary means

Table 2 VDA to ISO material classification mapping table

- **Application**

If materials are contained in the MDS/module, the application codes associated to the material can be analysed with this option.

- **Recyclate (optional)**

If materials are contained in the MDS/module, and they contain recyclate information, this analysis option can be used.

Depending on your initial selection, you will be presented with the following message for information

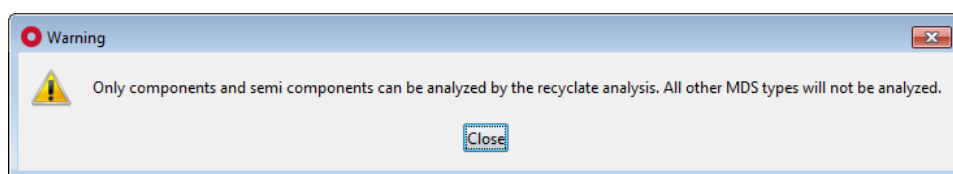
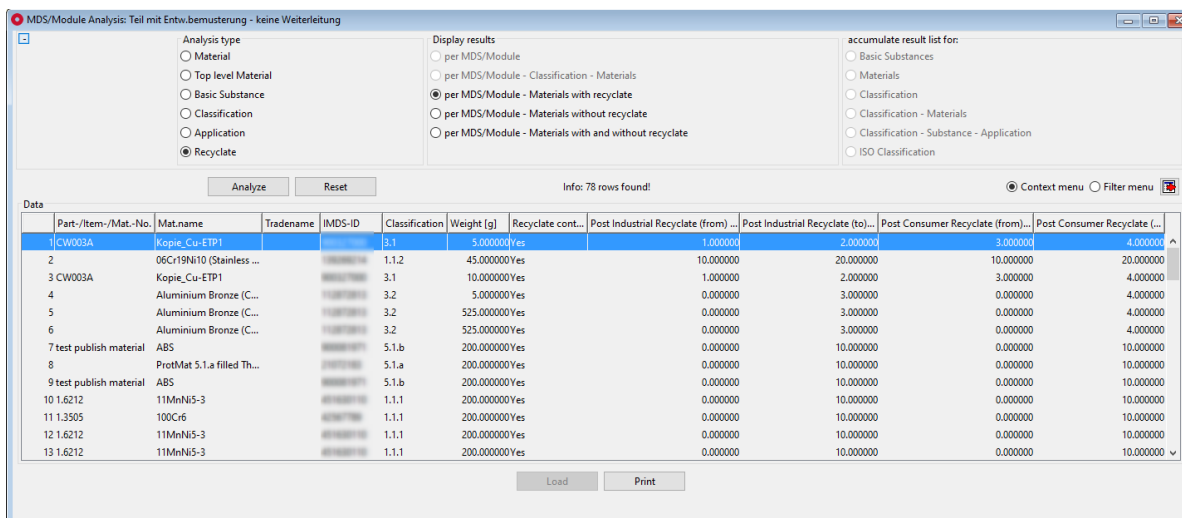


Figure 125 MDS/module analysis - Warning message for recyclate analysis

Various option configurations are available for selection, depending on your specific analysis report

The result of the analysis will be displayed in the lower part of the panel.



MDS/Module Analysis: Teil mit Entw.bemusterung - keine Weiterleitung

Analysis type

- ☐ Material
- ☐ Top level Material
- ☐ Basic Substance
- ☐ Classification
- ☐ Application
- ☒ Recyclate

Display results

- ☐ per MDS/Module
- ☐ per MDS/Module - Classification - Materials
- ☒ per MDS/Module - Materials with recyclate
- ☐ per MDS/Module - Materials without recyclate
- ☐ per MDS/Module - Materials with and without recyclate

accumulate result list for:

- ☐ Basic Substances
- ☐ Materials
- ☐ Classification
- ☐ Classification - Materials
- ☐ Classification - Substance - Application
- ☐ ISO Classification

Data

Info: 78 rows found!

	Part-/Item-/Mat.-No.	Mat.name	Tradename	IMDS-ID	Classification	Weight [g]	Recyclate cont...	Post Industrial Recycle (from)...	Post Industrial Recycle (to)...	Post Consumer Recycle (from)...	Post Consumer Recycle (...)
1	CW003A	Kopie_Cu-ETP1		45000000	3.1	5.000000	Yes	1.000000	2.000000	3.000000	4.000000
2		06Cr19Ni10 (Stainless ...		45000000	1.1.2	45.000000	Yes	10.000000	20.000000	10.000000	20.000000
3	CW003A	Kopie_Cu-ETP1		45000000	3.1	10.000000	Yes	1.000000	2.000000	3.000000	4.000000
4		Aluminium Bronze (C...		11000000	3.2	5.000000	Yes	0.000000	3.000000	0.000000	4.000000
5		Aluminium Bronze (C...		11000000	3.2	525.000000	Yes	0.000000	3.000000	0.000000	4.000000
6		Aluminium Bronze (C...		11000000	3.2	525.000000	Yes	0.000000	3.000000	0.000000	4.000000
7	test publish material	ABS		45000000	5.1.b	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
8		ProtMat 5.1.a filled Th...		11000000	5.1.a	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
9	test publish material	ABS		45000000	5.1.b	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
10	1.6212	11MnNi5-3		45000000	1.1.1	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
11	1.3505	100Cr6		45000000	1.1.1	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
12	1.6212	11MnNi5-3		45000000	1.1.1	200.000000	Yes	0.000000	10.000000	0.000000	10.000000
13	1.6212	11MnNi5-3		45000000	1.1.1	200.000000	Yes	0.000000	10.000000	0.000000	10.000000

Buttons: Load, Print

Figure 126 MDS/module analysis - Result

If multiple MDS/modules are selected for analysing, there are additional options of how you would like the result will be displayed/reported (i.e. per MDS/module, or accumulated results list option- Basic substance). By selecting the respective radio button options either from the “**Display list**” options or the “**accumulate results list for**” options, the results totals can be separated or summed up. This separation or summing up is possible for all options, except for recyclate.

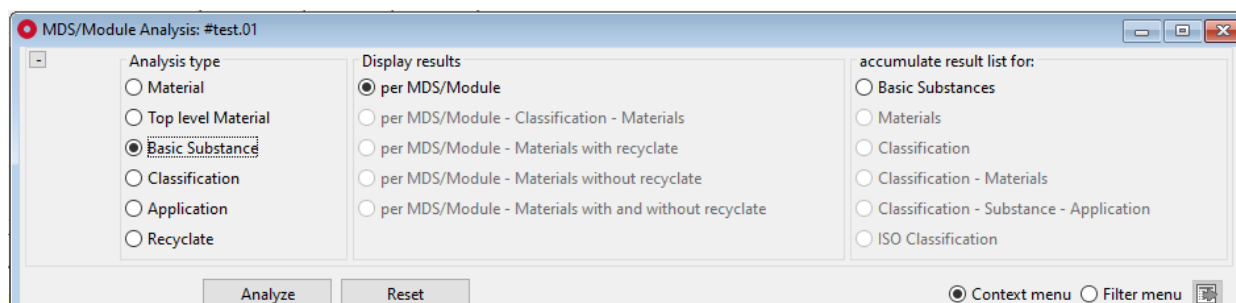


Figure 127 MDS/module analysis - Basic substance analysis

Attention: Please ensure that your selected MDS/modules are not also contained in other MDS/modules that have been selected for the analysis. This can falsify the results!

The following actions are available (due to technical reasons not for all analysis types):

- **Load**
Open the selected MDS/module in the edit window
- **Print**
See following chapter 13.2.4

14.2.4 Print

When an analysis is complete, the **“Print”** button, is activated.

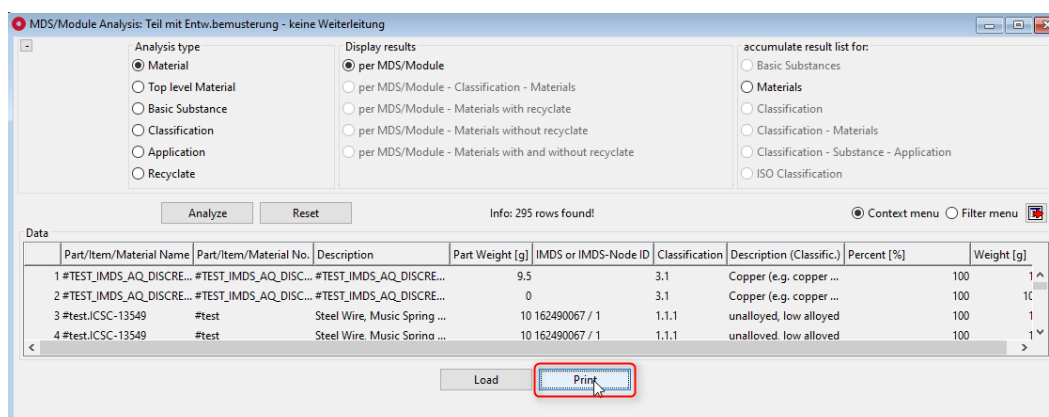


Figure 128 MDS/module analysis - Print a report

Using this button, the print preview panel will be opened.

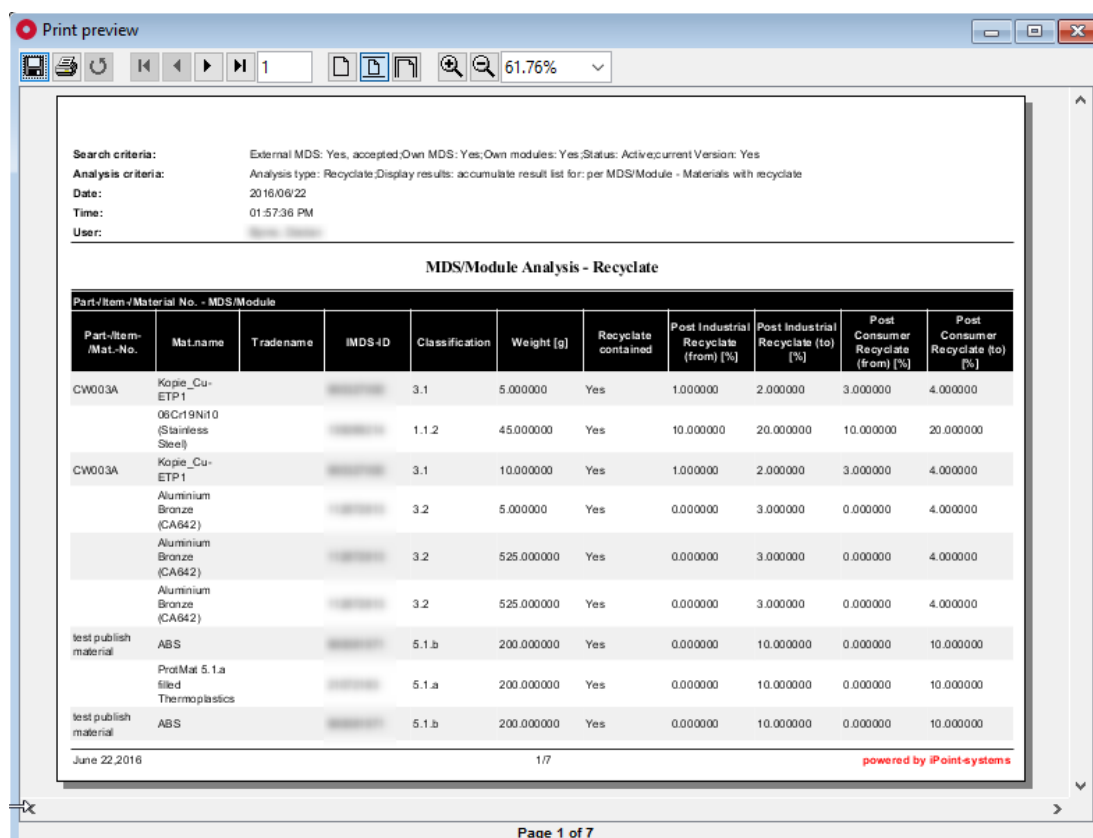


Figure 129 Print preview

For more detailed information, See also chapter 13.2.4

The window has the following functions:

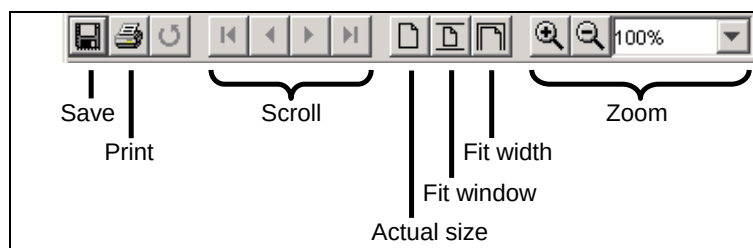


Figure 130 Print preview functions

Using the “**Save**” button, a save dialogue box will open.

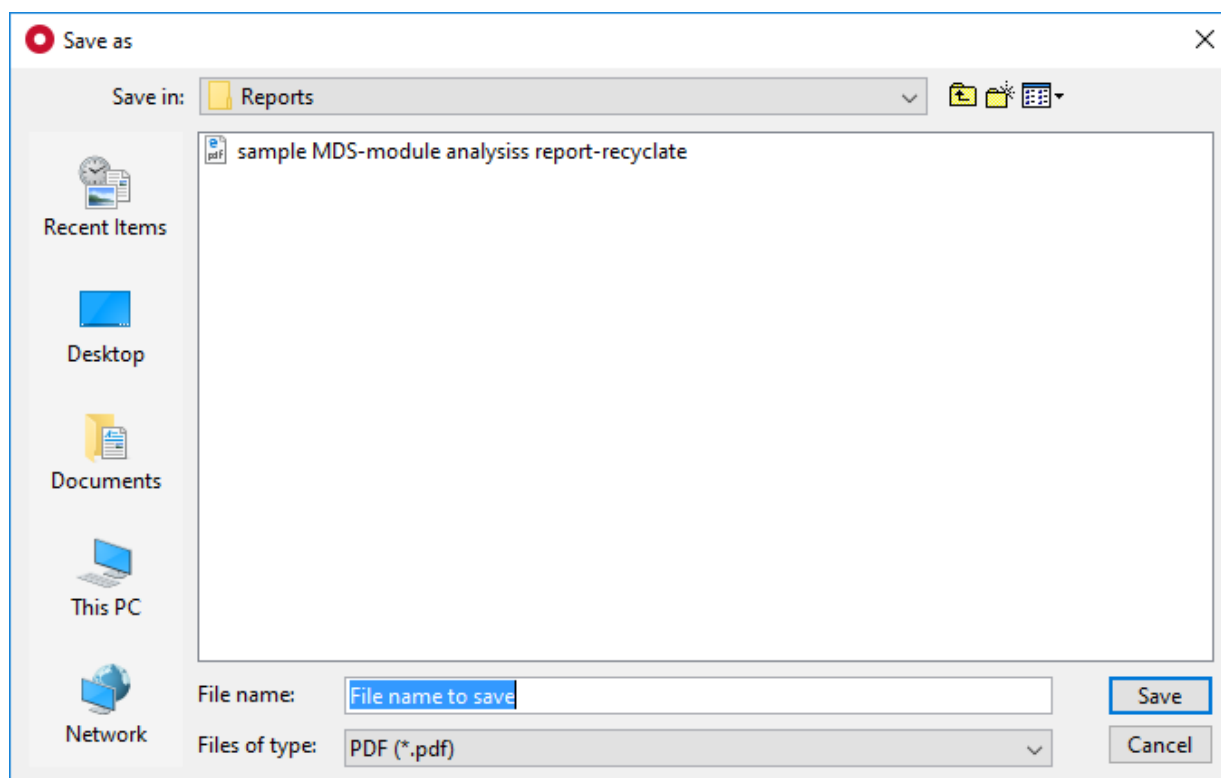


Figure 131 Saving a print preview/report

The following file types are available for saving:

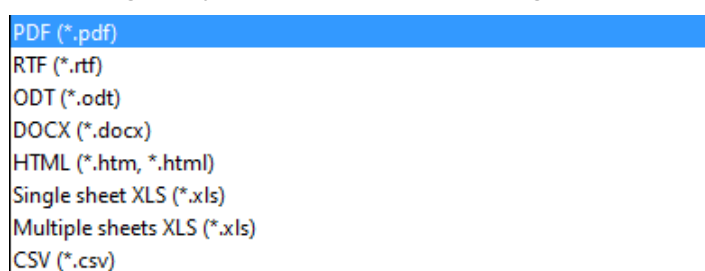


Figure 132 Available File types

Using the “print” button, the standard print dialogue box will open.
Other options are available, if the appropriate software is installed

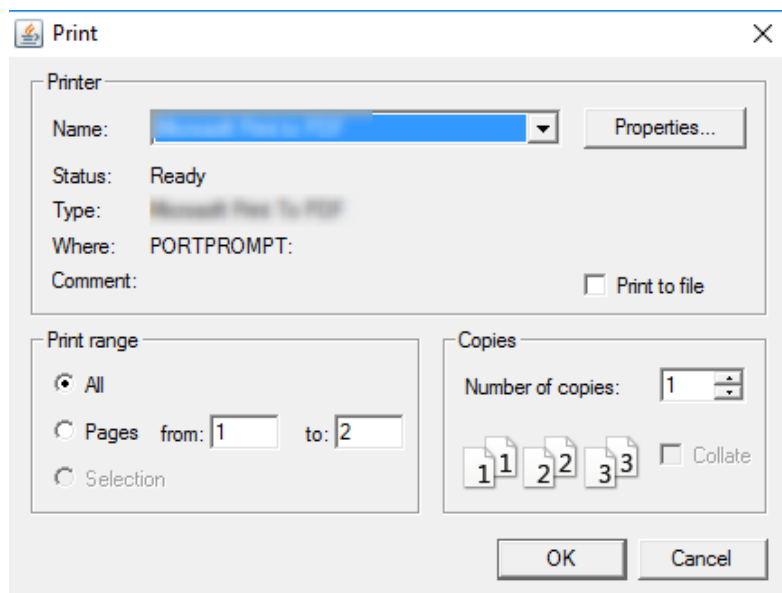


Figure 133 Printer selection

15 PDM BoM Import (iMDS)

The IMDS MDS/module can be created also by the import. This is preferred option in case of very complex BOMs.

During the import process, existing MDSs and modules are looked up and referenced in the BOMs using matching algorithm which details are described in the related interface documentation.

Import screen can be accessed via **“Data → PDM BoM Import (iMDS)”**.

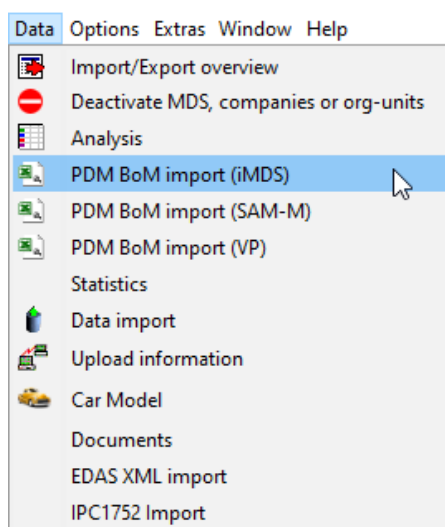


Figure 134 PDM BoM Import (iMDS)

This loads a dialog window that allows user to select CSV import file(s).

Supported are only CSV file with specific format described in the related interface documentation.

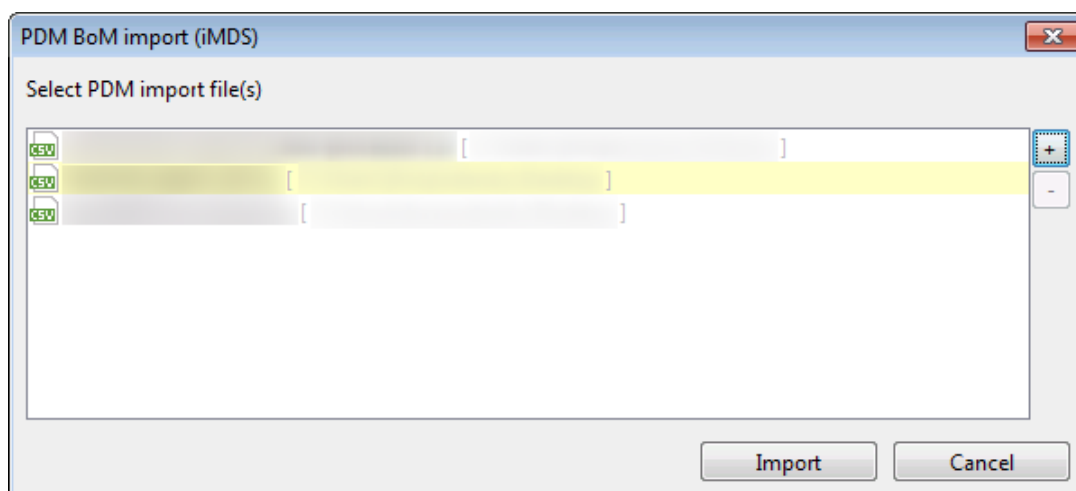


Figure 135 PDM BoM import (iMDS) panel

First at least one CSV import file in supported format must be selected for the import. This is done by click on the  button, which will display standard open dialog window. Wished file can be confirmed by click on the **“Import”** button. File can be removed by click on the  button.

Import can be started using **“Import”** button. To cancel import, the **“Cancel”** button is used.

In case only one import file is selected, below dialogue allowing to select the way of import is displayed.

- **Direct**

The import is started immediately.

User session is locked while the import process is running, preventing the user from working with the application until the import has finished.

The results of the import including potential errors is displayed immediately.

For this import, no entry is created in the DB job manager.

- **Job**

The database job is created for the import and is stated as soon as there is an available slot for processing of the jobs.

The user can work with the application while the import process is running.

The result of the import including potential errors is available in the entry in the DB job manager.

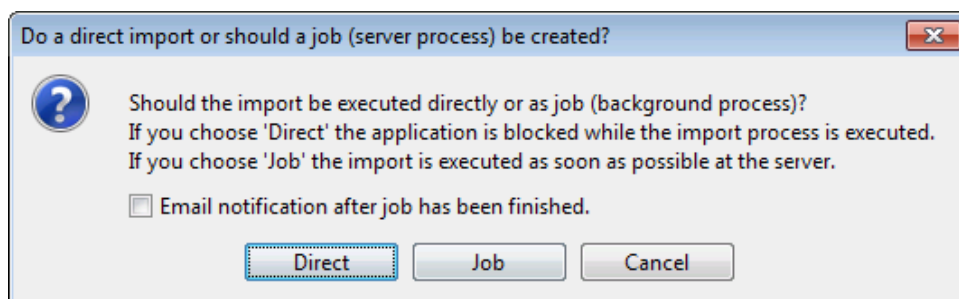


Figure 136 PDM BoM Import (iMDS) single file import mode options

In case at least two import files are selected, the files are uploaded to the database and below dialogue is displayed that allows to start or cancel the import.

In this case the import is done automatically via database job.

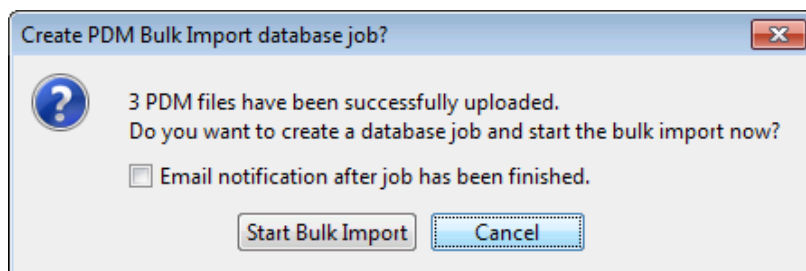


Figure 137 PDM BoM Import (iMDS) multiple files import mode options

In case the import is done via the DB job, the dialog window is shown. This informs user that the database job was created. The ID of the job is included in the message. Additionally, by click on the button “**Yes**”, it is possible to open DB Job Manager to monitor the actual status of the import. By click on the “**No**” button, the dialog window is closed.

For more details about working with DB Job Manager, please see IHS user manual, **chapter 21**.

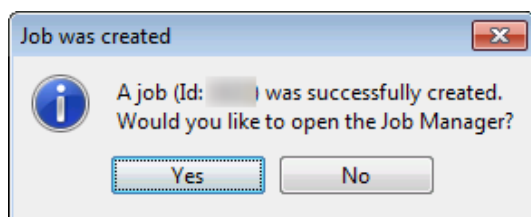


Figure 138 Dialog window with ID of the job for the import

For both of above import mode options panels, it is possible to check the option “**Email notification after job has been finished**”. If checked and the import is done by job, the email notification is sent to upon completion of the import to the user who started the import.

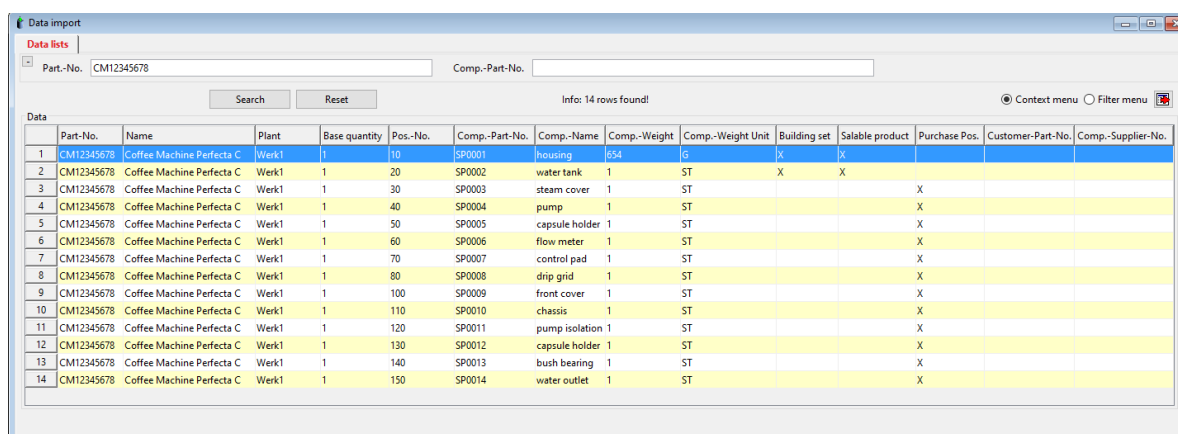
PLEASE NOTE: Only user with activated permission “**PDM_BOM_IMPORT_DIRECT**” can access PDM BoM Import (iMDS) import panel.

16 Data import results

On demand MDS and modules will be created automatically from a SAP bill of material file. Data transfer results will be listed by either by the menu 'data transfer' or by the icon .

16.1 Data List

Using this overview you can get information regarding all the BoM's that have been imported. The list will contain information regarding the BoM and the associated contents. Specific information regarding a BoM and its associated parts list can be viewed and exported by searching for the BoM name in the Part-No field. To find information regarding specific parts, use the Comp.-Part-No. field. Add your part no. of interest to the field and search. The results will list all the instances where the part no. was found, with the reference to the associated BoM it was contained in.



Data import														
Data lists														
Part-No. CM12345678 Comp.-Part-No.														
Search Reset Info: 14 rows found! Context menu Filter menu														
Data	Part-No.	Name	Plant	Base quantity	Pos.-No.	Comp.-Part-No.	Comp.-Name	Comp.-Weight	Comp.-Weight Unit	Building set	Salable product	Purchase Pos.	Customer-Part-No.	Comp.-Supplier-No.
1	CM12345678	Coffee Machine Perfecta C	Werk1	1	10	SP0001	housing	654	G	X	X			
2	CM12345678	Coffee Machine Perfecta C	Werk1	1	20	SP0002	water tank	1	ST					
3	CM12345678	Coffee Machine Perfecta C	Werk1	1	30	SP0003	steam cover	1	ST			X		
4	CM12345678	Coffee Machine Perfecta C	Werk1	1	40	SP0004	pump	1	ST			X		
5	CM12345678	Coffee Machine Perfecta C	Werk1	1	50	SP0005	capsule holder	1	ST			X		
6	CM12345678	Coffee Machine Perfecta C	Werk1	1	60	SP0006	flow meter	1	ST			X		
7	CM12345678	Coffee Machine Perfecta C	Werk1	1	70	SP0007	control pad	1	ST			X		
8	CM12345678	Coffee Machine Perfecta C	Werk1	1	80	SP0008	drip grid	1	ST			X		
9	CM12345678	Coffee Machine Perfecta C	Werk1	1	100	SP0009	front cover	1	ST			X		
10	CM12345678	Coffee Machine Perfecta C	Werk1	1	110	SP0010	chassis	1	ST			X		
11	CM12345678	Coffee Machine Perfecta C	Werk1	1	120	SP0011	pump isolation	1	ST			X		
12	CM12345678	Coffee Machine Perfecta C	Werk1	1	130	SP0012	capsule holder	1	ST			X		
13	CM12345678	Coffee Machine Perfecta C	Werk1	1	140	SP0013	bush bearing	1	ST			X		
14	CM12345678	Coffee Machine Perfecta C	Werk1	1	150	SP0014	water outlet	1	ST			X		

Figure 139 Data import: Data List

- **LEVEL**
describes the level of the BoM
- **HEAD_NO**
the Part-/Item-/Material-no defined for the MDS/Module in the transfer file.
The deeper the level the more indent is used to display the MDS/module
- **NAME**
Name of the found MDS/module
- **POS_NO**
Position-No according the BOM or entered when added manually
- **TEXT**
Information about the status
 - **Empty**
The MDS/module exists in the In-house-System and was correct allocated.

- **MDS missing**
A requested supplier MDS does not exist.
- **MDS exists, but not yet accepted**
A supplier MDS exists as a received MDS but it wasn't accepted yet.
- **<Amount> Missing positions, < <amount> not accepted, incomplete positions**
Sum of all missing positions in all underlying levels.
Crucial is the existence of a replacement node in the structure tree of the MDS/module and potentially the existing but not yet accepted MDS in all underlying levels.

17 Statistics

This function can be used to view the system statistics for your “Own MDS’s”, “Own modules and “Accepted MDS’s”

Due to the very complex calculation and the impact on performance while the calculation is being performed, this function can only be actioned manually. This calculation can take some time.

To start the manual calculation, select ‘Help’ → ‘About’ from the menu.

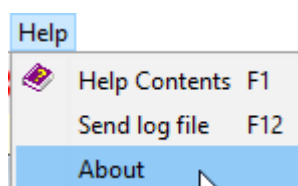


Figure 140 Creating system statistics

A dialogue box will open, allowing you to generate the statistics.

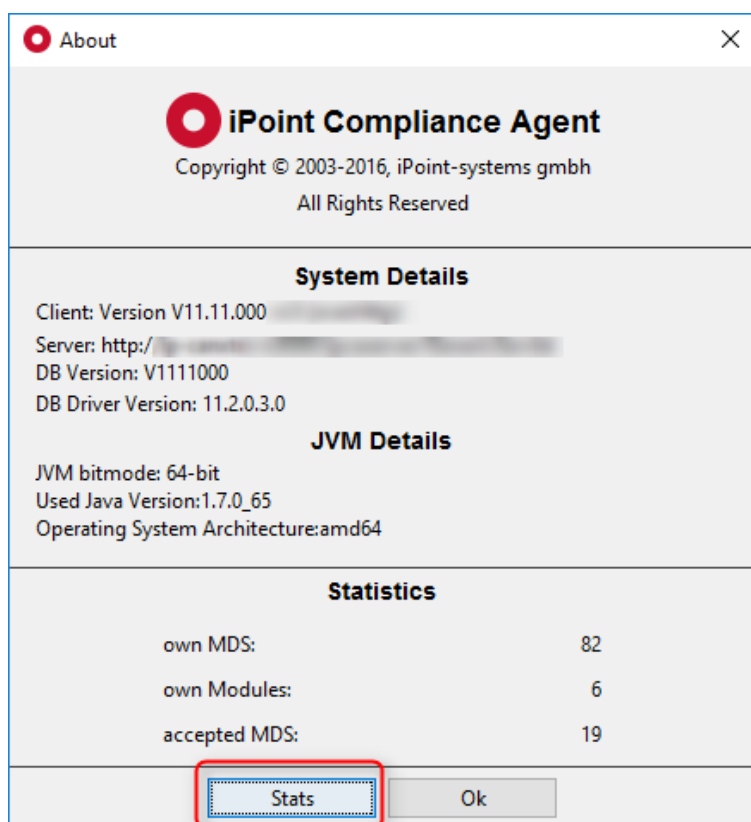


Figure 141 Statistics

To start the calculation, select “stats”.

18 Tree functions

18.1 Tree expanding

Using the tree expanding function, you can administrate the behaviour of the system when expanding nodes of the loaded datasheets.

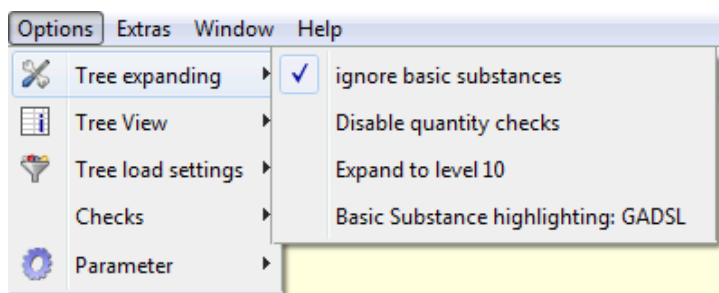


Figure 142 Tree expanding options

18.1.1 Ignore basic substances

Selecting this option, no basic substances will be displayed in the detailed tree view, when you expand the tree nodes from the  option on the top tool bar, when an MDS/module is loaded.

If you choose to expand the materials nodes manually, they will expand and display the basic substances, despite the fact you have chosen the option "ignore basic substances".

To expand the tree view to either include or exclude basic substances, this option must be activated or deactivated in advance. By default, this is set to ignore basic substances.

18.1.2 Disable quantity checks

Selecting this option, no quantity checks are executed while editing a tree. The warning message "The sum of fix-values and to-values is below 100%" will not appear.

18.1.3 Expand to level

Selecting this option, allows the user to select the level to expand the tree structure. By default, this is set to level 10

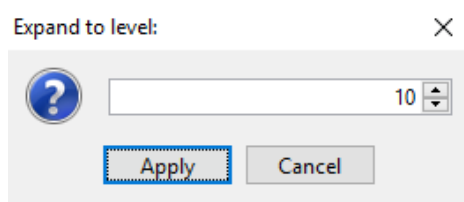


Figure 143 Expand to level

Selecting the "Apply" button the parameter will be set. Selecting the "Cancel" button the window will be closed without changing the parameter.

18.1.4 Basic Substance Highlighting

Selecting this option, allows the user to set the "Basic substance highlighting" options for various substance group types and/or substance groups for the tree view. By default, the highlighting option is set to GADSL substances, this can be changed to be user specific.

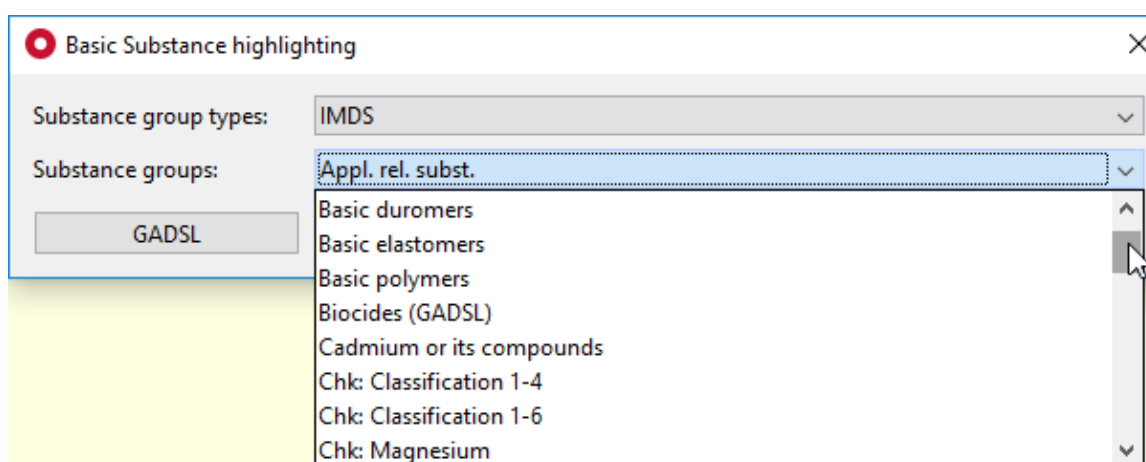


Figure 144 Selection of a substance group type/substance group for highlighting

To highlight specific substances, the substance group type must be selected from the list, available in the dropdown menu, first:

Other options may be available depending on your system configuration and licenced modules.

- **GADSL**
Default highlighting in IMDS
- **IMDS**
Selection of an IMDS substance group
- **Jama/Japia (optional)**
Selection of a Jama/Japia substance group
- **IHS (optional)**
Selection of an own substance group

Following the selection of the substance group type, the substance group itself can be selected.

When confirming the selection, using the "save" button, all substances that are members of the selected substance group will be highlighted with a red font when loaded, post "Save".

For an easy switch back to the default highlighting option, use the "GADSL" button embedded in the dialogue box.

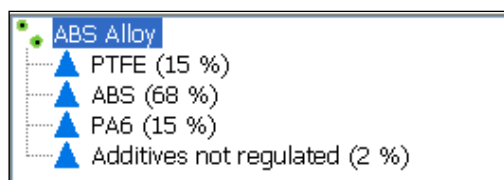


Figure 145 Example for a material with GADSL highlighting

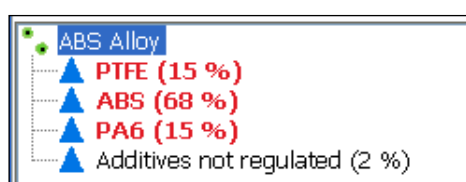


Figure 146 Example for a material with IMDS- basic polymer highlighting

For more information on “Substance Group Types” and “Substance Groups” see chapter 23.1.

Note:

If a substance group is changed, or has been newly created, the usage of it can lead to displaying wrong results, if the MDS was opened, prior to changing or saving the substance group.

For this reason we recommend to refresh the MDS before switching to another substance group for highlighting.

18.2 Tree view

This extension of tree view allows user to define, what is displayed in the tree view for IMDS MDS/Module (component, semi-component and material) as well as for SAM-M module (article and mixture).

User is able to control this by using switch available in the menu “**Options → Tree View**”.

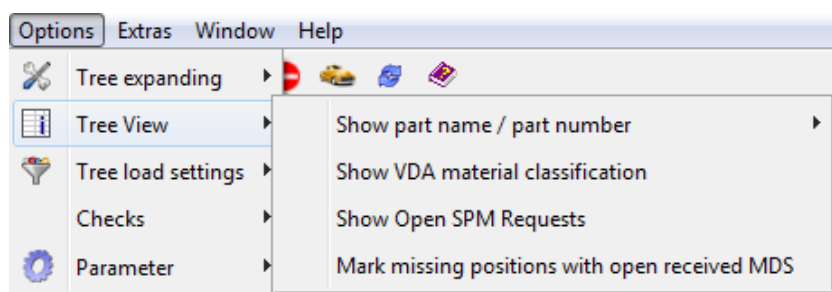


Figure 147 Tree view settings

By selecting any of below options, the configuration is saved for the user and will be used also after restart of the application for all loaded datasheets.

18.2.1 Show part name / part number

- **Show part name**
Upon click on this option, all nodes are enriched with the part/item name that is added to the right from the node description.
- **Show part number**
Upon click on this option, all nodes are enriched with the part/item number that is added to the right from the node description.
- **Show both**
Upon click on this option, all nodes are enriched with the part/item name and part/item number that are added to the right from the node description.

18.2.2 Show VDA material classification

Upon click on this option, all material nodes are enriched with the number of the VDA material classification that is added to the right from the node description.

18.2.3 Show open SPM requests

Upon click on this option, all relevant nodes of defined type (for more details see description of the configuration parameter “**MDS_SPM_OPEN_REQUEST_CHECK**” in **chapter 33.3**) with open SPM request having matching part number are enriched with a symbol  that is added to the right from the node description.

PLEASE NOTE: In order to display existence of an open SPM request for newly added node, the currently edited datasheet needs to be reloaded or refreshed.

18.2.4 Mark missing positions with open received MDS

Upon click on this option, all nodes of type missing position with open received MDS having matching part number are enriched with a symbol  that is added to the right from the node description.

PLEASE NOTE: In order to display existence of an open received MDS for newly added missing position, the currently edited datasheet needs to be reloaded or refreshed.

18.3 Tree load settings

Under Menu → Options → Tree load settings it is possible to define filter for tree loading and also settings could be made until which level the detail data of a node will be loaded when a MDS/Module is loaded.

18.3.1 Tree load settings

The benefits of having the ability to change the tree load settings is to:

- Increase the speed for tree loading
- Reduce the memory usage

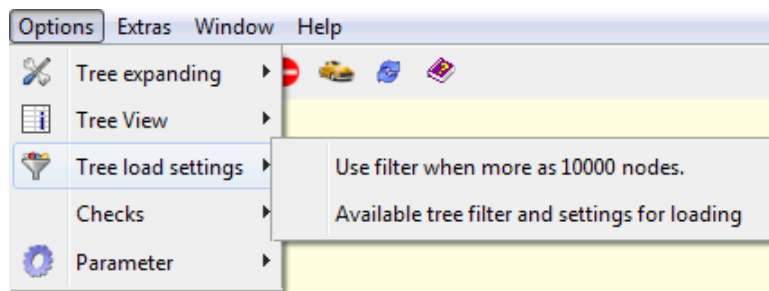


Figure 148 Tree load settings

There are two sub menu options available, under the menu “Tree load settings”.

The first, is the number of nodes, when the filters are to be applied for loading. This is defined with the option “Use filter when more as <10000> nodes.” <10000> is being the current value used.

18.3.1.1 Menu “Use filter when more as ...”:

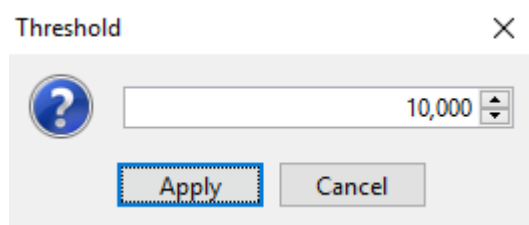


Figure 149 Threshold dialogue for tree load filter

For the number of nodes, the minimum threshold value is 100, and the maximum value is 100000.

It is possible that an MDS/module will be filtered, that has a lower node count than the given threshold.

If the MDS/module is reopened again later, the filter should take effect.

18.3.1.2 Menu “Choice for tree filters and load settings”:

The second sub menu “Choice for tree filter and load settings” allows the user to define filters. The filter types for your own and for external MDS can be defined.

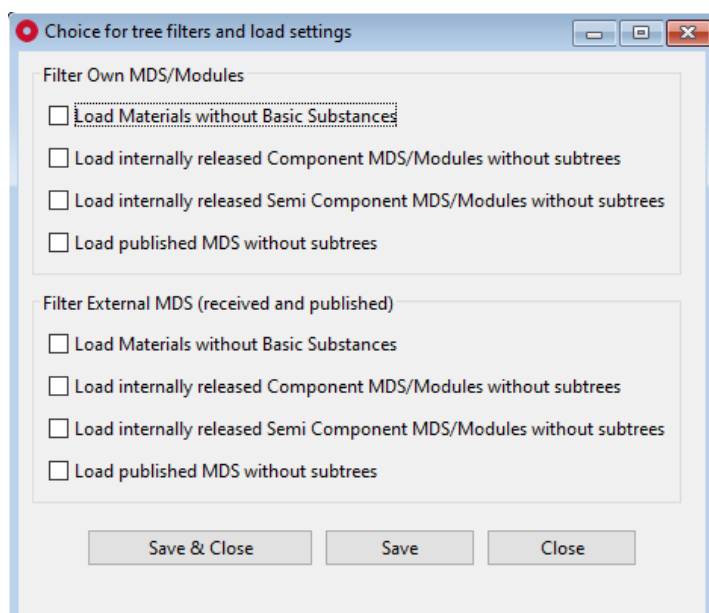


Figure 150 Dialogue for Choice for tree load filter selection and load settings (3 Tier Mode)

In this sub menu, four different types of filters for each (as described below) can be selected. Each filter type can be applied separately for your own and/or external MDS's (received and published)

See below for more detail on each option.

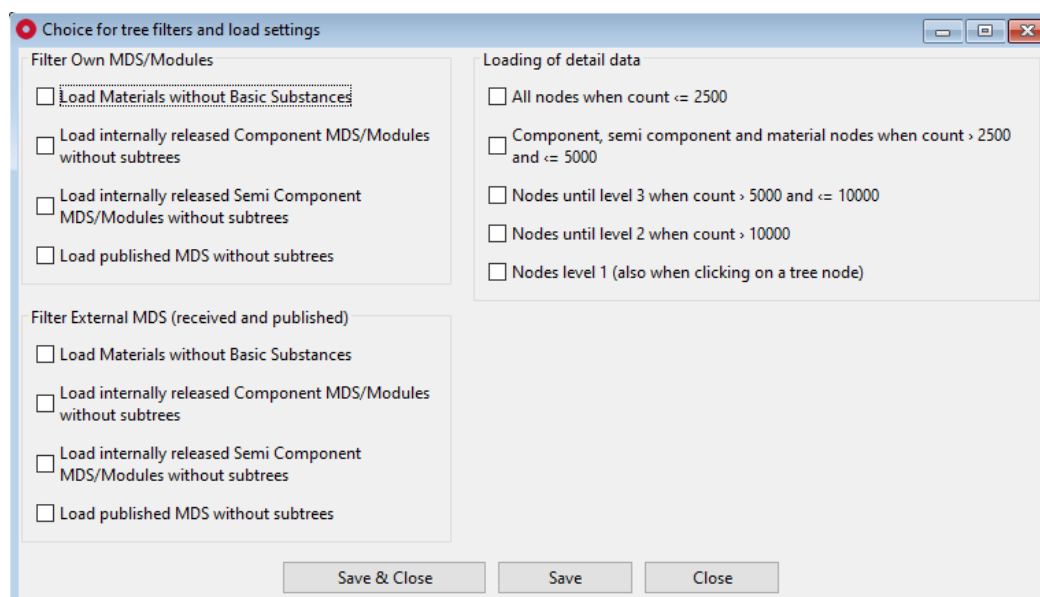


Figure 151 Dialogue for Choice for tree load filter selection and load settings (Direct mode)

NOTE: The loading option “Loading of detail data” is only available in direct mode For more information on changing between “Direct” and “3 Tier” mode, contact your internal support.

In the left section of this sub menu, four different types of filters (as described below) can be selected. Each filter type can be applied separately for your own and/or external MDS's (received and published)

The characteristics of the filter are

- Configured filter will have an effect on all MDS/Modules that are loaded
 - Except MDS/Modules that are opened with the context menu "Edit"
 - Except MDS/Modules that are added to the MDS/Modules tree
- Filtered nodes that are marked (italic / yellow background)
- Filtered nodes can be reloaded from the context menu with "Reload data"
- The function "Refresh tree" also uses the configured filter
- Restrictions apply, if the tree was loaded with an active filter
 - in the tree search function
 - in the context menu "Statistics"
 - Calculated weight is not shown
- Filter can be combined
- Filter can be selected for your own MDS/modules, as well as for external MDS's
- Filter only take effect, if the node number exceeds the defined threshold (see above)

The following filter options are available:

- **Filter "Load Materials without Basic Substances"**

If you choose this filter option, all, contained material nodes, that were loaded, will be without any basic substances.

Choose this filter, if you do not need to see information about the basic substances.

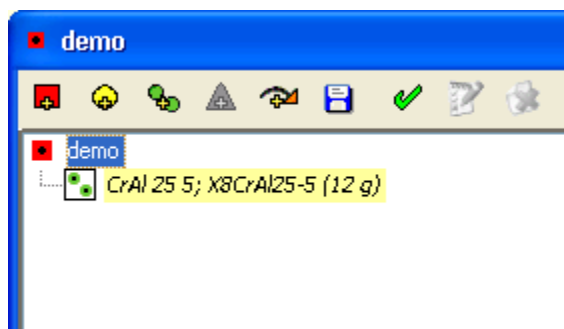


Figure 152 Example for filter "Load Materials without Basic Substances"

- **Filter "Load internally released Component MDS/Modules without subtrees"**

If you choose this filter option, all, contained internally released MDS/Modules of the type components, that were loaded, will be without subtrees.

Choose this filter, if you do not need to see information about the structure, of internally released MDS/Modules.

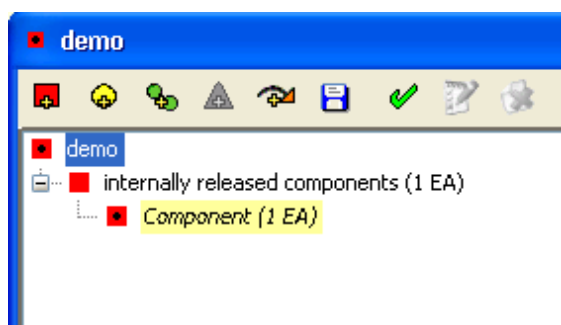


Figure 153 Example for filter “Load internally released Component MDS/Modules without subtrees”

- **Filter “Load internally released Semi Component MDS/Modules without subtrees”**

If you choose this filter option, all, contained internally released MDS/Modules of the type semi component, that were loaded, will be without subtrees.

Choose this filter, if you do not need to see information about the structure of internally released MDS/Modules.

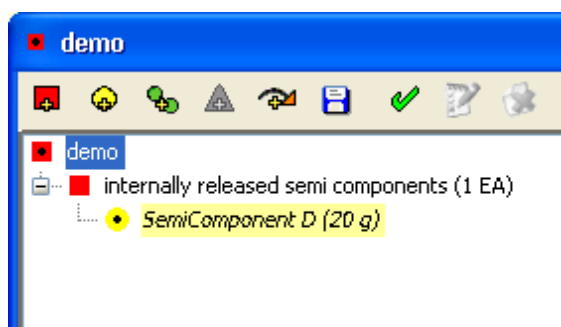


Figure 154 Example for filter “Load internally released Semi Component MDS/Modules without subtrees”

- **Filter “Load published MDS without subtrees”**

If you choose this filter option, all, contained published MDS’s that were loaded, will be without subtrees.

Choose this filter, if you do not need to see information about the structure of published MDS.

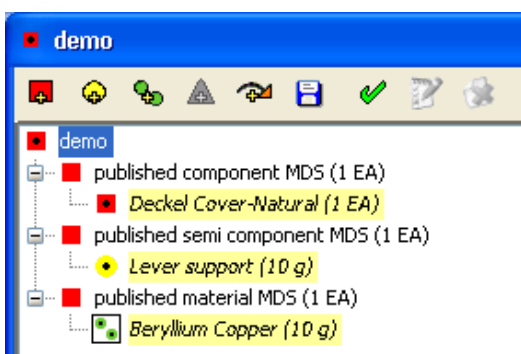


Figure 155 Example for filter “Load published MDS without subtrees”

18.3.2 Settings for the loading of detail data

During the loading of a MDS/Module (from the search dialogue or during reloading, or if it is a new MDS/Module that is inserted into the tree structure) it is possible to load, not only the information about the tree data, but also (additional) detailed data of each node. This behaviour can be defined in the input area “Loading of detail data” in the dialogue box above. Additionally, this can be defined, to only be active at predefined levels or node counts. These setting options might be useful, if the loading of the detailed data, when selecting a node is very slow, due to a slow hardware infrastructure.

ATTENTION: Depending on the selected settings, the loading of a tree structure, could take significantly more/less time. Also the memory usage could increase significantly which could result in problems on the server, or with your own client machines performance!

The levels that the detailed data should be loaded, beyond the actual node that is loaded, this depends on the number of nodes that the MDS/Module comprises of.

The following settings are available and will be applied if the specified node counts are reached:

- All nodes, i.e. all, detailed data will be loaded for the complete tree!
- Component-, semi component- and material nodes, irrespective of which level they occur
- Nodes until level 3, respectively level 2, (i.e. the actual node and level 3 or 2 levels deeper)
- Nodes level 1, (i.e. the actual node and its direct children.

If this last setting option is selected, the detailed data of the direct children will be available when a node within the tree has been selected.

The default value for the node count is pre-defined by the system, but can be changed to other values on demand, please contact the iPoint Support team.

19 Import Export Overview (optional)

19.1 Search

In the “Import/Export overview” all, imports and export of MDS/modules are shown, which have not been performed by the AI interface.

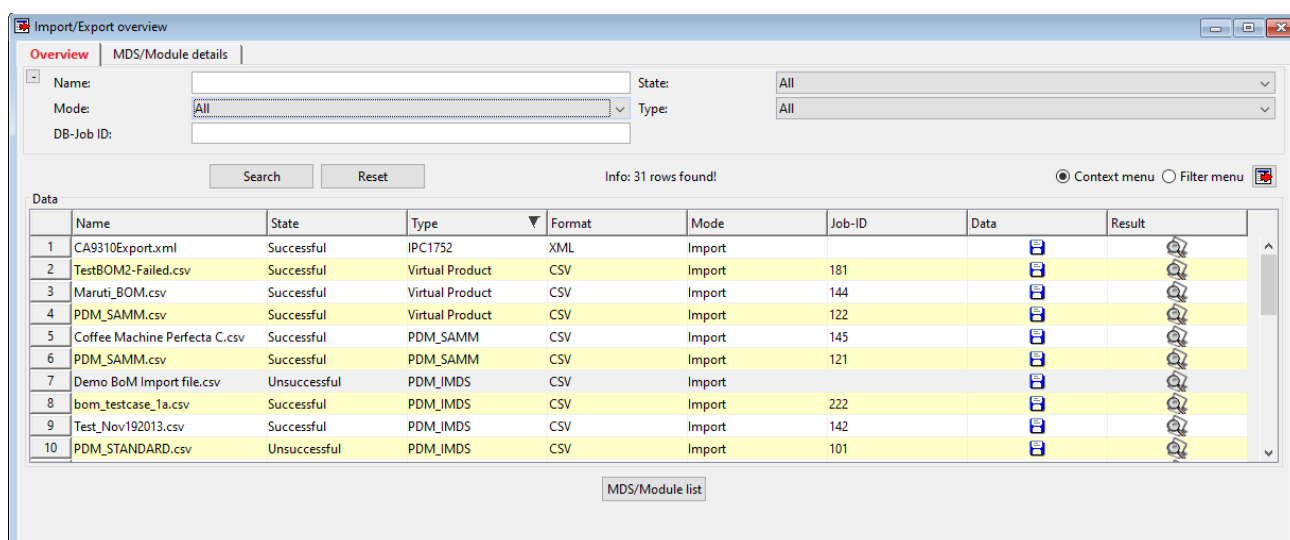


Figure 156 Import/Export overview

The panel is divided into two areas:

- Search criteria (marked in red)
- Result list (marked in green)

The following search criteria is available:

- **Name**
Name of the file that was imported or exported
- **Mode**
 - Import
 - Export
- **DB-Job ID**
The unique job id
- **State**
 - Open
 - Successful
 - Unsuccessful
 - Successful with error(s)
 - In Process

- **Type**
 - All
 - PCC
 - PDM_IMDS
 - PDM_SAMM
 - Virtual Product
 - CMRT WORKLIST
 - IPC1752
 - Jama/Japia

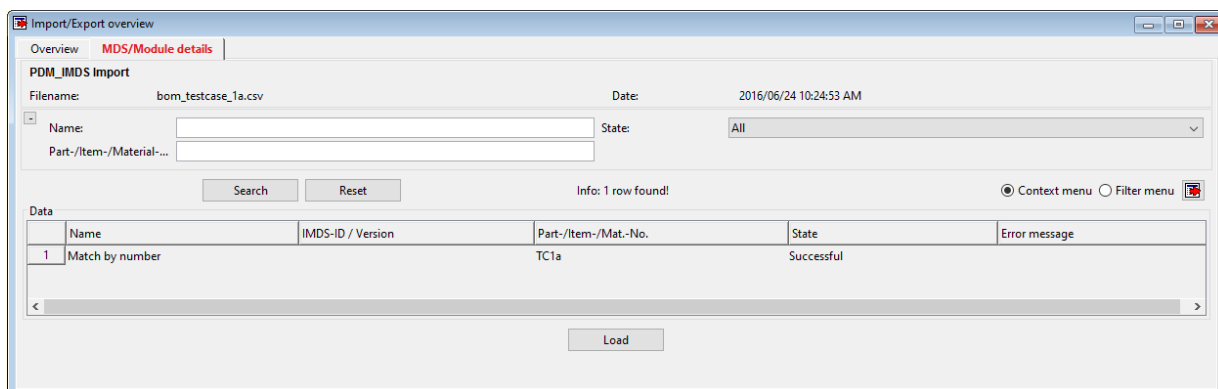
The above options “Type” can vary, depending on your company’s specific extensions and licenced modules.

For more detailed information, please see your company specific user manual

The list contains the following information:

- **Name**
Name of the file that was imported or exported
- **State**
State of the import or export
- **Data**
A copy of the import or export file
- **Type**
Type of the import or export
- **Format**
Format of the file that was imported or exported
- **Result**
The log file of the import or export
By selecting the symbol  the file will be opened
- **Mode**
Import or Export
- **Job-ID**
The id of the job, if the import or export was executed as a background process.

The “MDS/module List” button can be used to show the details (history) of an import/export (if available). The details show all MDS/modules that where/are related to the import or export.



Import/Export overview

Overview **MDS/Module details**

PDM_IMDS Import

Filename: bom_testcase_1a.csv Date: 2016/06/24 10:24:53 AM

Name: State: All

Part-/Item-/Material-...

Search Reset Info: 1 row found! ☒ Context menu ☐ Filter menu

	Name	IMDS-ID / Version	Part-/Item-/Mat.-No.	State	Error message
1	Match by number		TC1a	Successful	

Load

Figure 157 Import/Export overview - MDS/module details

The following criteria is available:

- **Name**
The name of MDS/module
- **Part-/Item-/Material...**
The part, Item or material number
- **State**
The state of the import/export
- **Error message**
Related error message

20 Deactivation of MDS, companies, or org- units

20.1 Overview

With the function “**Deactivation**” all MDS’s from a company or organisation unit or a single MDS can be marked as deactivated. Additionally, since IMDS R11, own MDS/modules that are deactivated, will be set in IMDS online system as obsolete. A deactivated/obsolete MDS/module cannot be edited any more by users. All deactivated/obsolete MDS/modules will result in the Q-Checker message “Warning: is deactivated/obsolete in iMDS”. The symbol for deactivation/obsolete will be shown in the symbol area (see chapter 9.2 “Status symbols”).

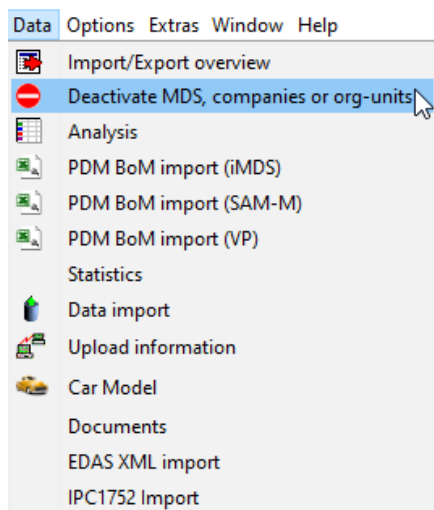


Figure 158 Deactivate MDS companies

Deactivated MDS/modules will not be found with the standard search panels and can therefore not be used any more by “normal” users.

Deactivated companies, organization units and MDS/modules can be reactivated and will be available to normal users.

Prior to deactivation of a company or organization unit, the user must answer a security question:

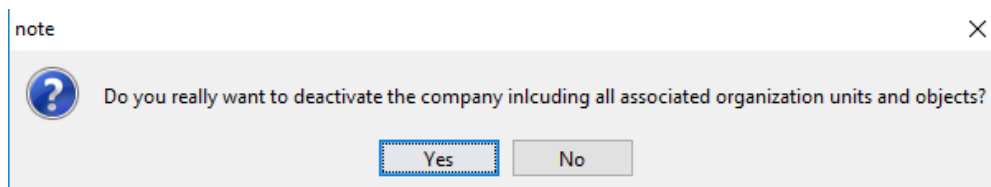


Figure 159 Security question prior to activation or deactivation

Attention:

With deactivation or activation of a company or organization unit, all MDS/modules from that company or organization unit, will be deactivated or activated.

For information purposes, a dialogue will be shown after activation or deactivation, which shows the number of affected MDS's:

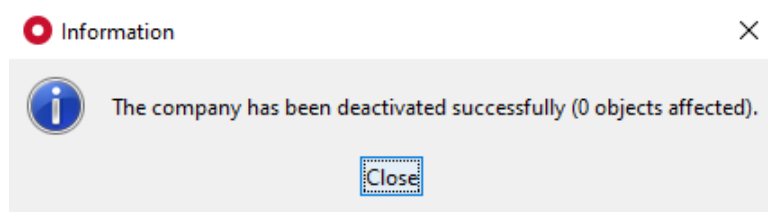


Figure 160 Information dialogue after deactivation

For using this function, a special user privilege is required.

20.2 Deactivation of companies

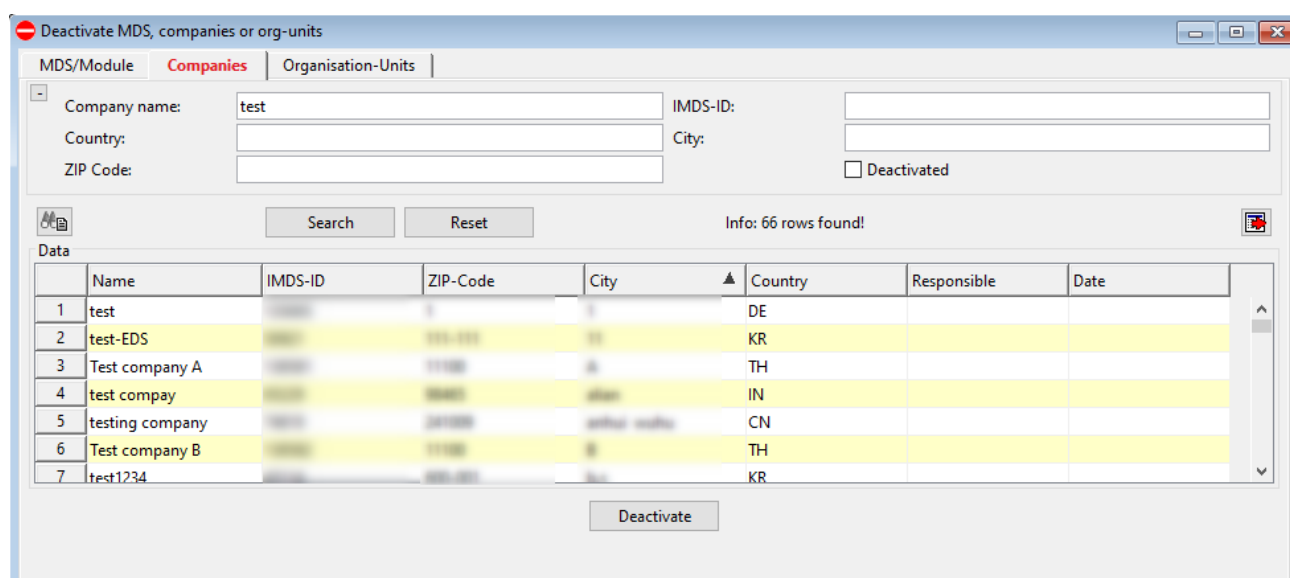


Figure 161 Deactivation of companies

The panel is divided into two areas:

- Search criteria (marked in red)
- Search result list (marked in green)

The following search criteria is available:

- **Company name**
Name of the company to deactivate/activate

-
- **Country**
Country of the company to deactivate/activate
 - **ZIP code**
ZIP code of the company to deactivate/activate
 - **IMDS-ID**
The IMDS-ID of the company to deactivate/activate
 - **City**
The city of the company to deactivate/activate
 - **Deactivated (Checked)**
Search only for companies which are already deactivated
 - **Deactivated (Unchecked)**
Search only for companies which are active

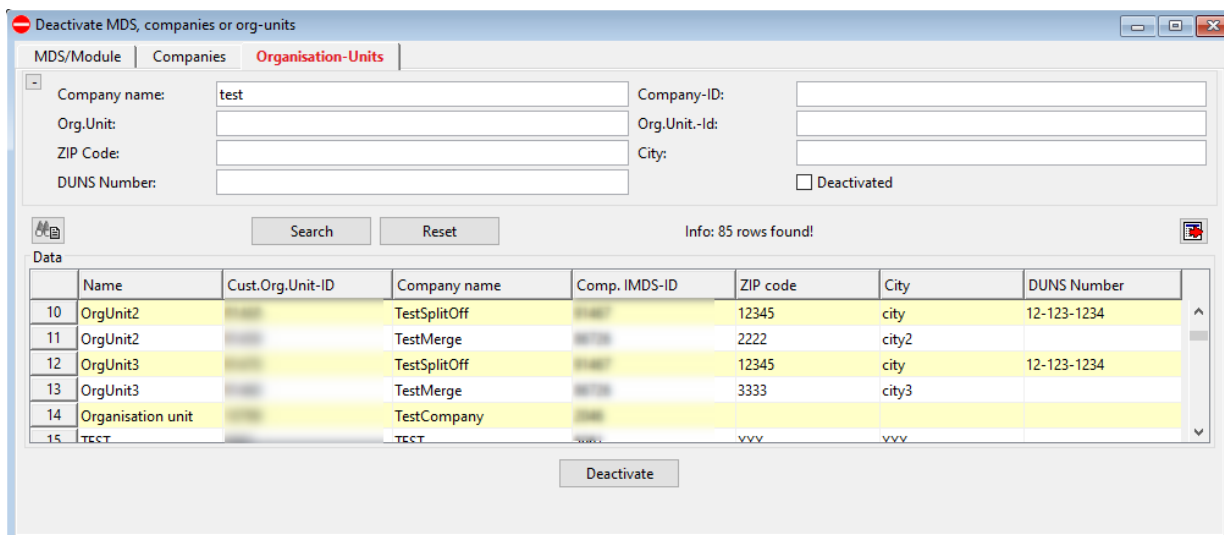
Search results list

The columns “**Responsible**” and “**Date**” are only populated, if the company has already been deactivated or reactivated. It will be documented who deactivated/activated the company and when it was done.

The following actions are available:

- **Activate (only for searches with “Deactivated” = yes)**
The selected (deactivated) company will be activated again, all associated MDS will be activated as a result
- **Deactivate (only for searches with “Deactivated” = no)**
The selected company will be deactivated, all associated MDS will be deactivated as a result
- **Export**
Export the search results list

20.3 Deactivation of organization Units



	Name	Cust.Org.Unit-ID	Company name	Comp. IMDS-ID	ZIP code	City	DUNS Number
10	OrgUnit2		TestSplitOff		12345	city	12-123-1234
11	OrgUnit2		TestMerge		2222	city2	
12	OrgUnit3		TestSplitOff		12345	city	12-123-1234
13	OrgUnit3		TestMerge		3333	city3	
14	Organisation unit		TestCompany				
15	TEST		TEST		YYY	YYY	

Figure 162 Deactivation of organization units

The panel is divided into two areas:

- Search criteria
- Search result list

The following search criteria are available:

- **Company name**
Name of the organization unit to deactivate/activate
- **Org. Unit**
Name of the organization unit to deactivate/activate
- **ZIP code**
ZIP code of the organization unit to deactivate/activate
- **DUNS Number**
The DUNS number of the organization unit to deactivate/activate
- **Company-ID**
The IMDS ID of the company of the organization unit to deactivate/activate
- **Org. Unit-Id**
The IMDS ID of the organization unit to deactivate/activate
- **City**
The city of the organization unit to deactivate/activate
- **Deactivated (checked)**
Search only for organization units which are deactivated

- **Deactivated (Unchecked)**
Search only for organization units which are active

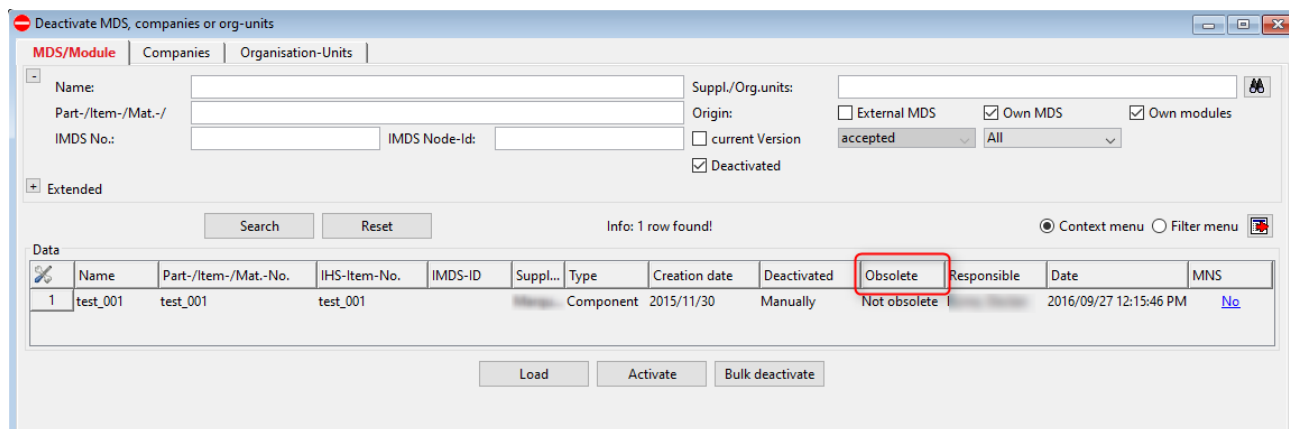
Search result list

The columns “Responsible” and “Date” are only populated, if the company has already been deactivated or reactivated. It will be documented who deactivated/activated the company and when it was done.

The following actions are available:

- **Activate (only for searches with “Deactivated” = yes)**
The selected (deactivated) organization unit will be activated again, all associated MDS will be activated as a result.
- **Deactivate (only for searches with “Deactivated” = no)**
The selected organization unit will be deactivated, all associated MDS will be deactivated as a result.
- **Export**
Export the search results list

20.4 Deactivation of individual MDS/modules



Deactivate MDS, companies or org-units

MDS/Module | Companies | Organisation-Units

Name: Suppl./Org.units:

Part-/Item-/Mat.-/ Origin: ☐ External MDS ☒ Own MDS ☒ Own modules

IMDS No.: IMDS Node-Id: ☐ current Version

☒ Deactivated

☐ Extended

Search Reset Info: 1 row found! ☒ Context menu ☐ Filter menu

Data	Name	Part-/Item-/Mat.-No.	IHS-Item-No.	IMDS-ID	Suppl...	Type	Creation date	Deactivated	Obsolete	Responsible	Date	MNS
1	test_001	test_001	test_001			Component	2015/11/30	Manually	Not obsolete		2016/09/27 12:15:46 PM	No

Load Activate Bulk deactivate

Figure 163 Deactivation of MDS/modules

The panel is divided into two areas:

- Search criteria
- Search result list

The available search criteria correspond to the standard criteria, for standard searches “MDS/all modules”.

- **Deactivated (checked)**
Search only for MDS's that are deactivated
- **Deactivated (Unchecked)**
Search only for MDS's that are active

Search result list

Note: With the introduction of IMDS Release 11 (13-11-2016) changes have been made to the information available in the results list.

The additional column "Obsolete" is now available (see above). This represents if the MDS/module has been made obsolete in the Online IMDS system.

The columns "Responsible" and "Date" are only populated, if the MDS/module has already been deactivated or reactivated or it has been made obsolete. It will be documented who deactivated/activated or made obsolete the MDS/module and when it was done.

The tool tip has been updated to reflect the MDS/module is either "Deactivated and/or Obsolete"

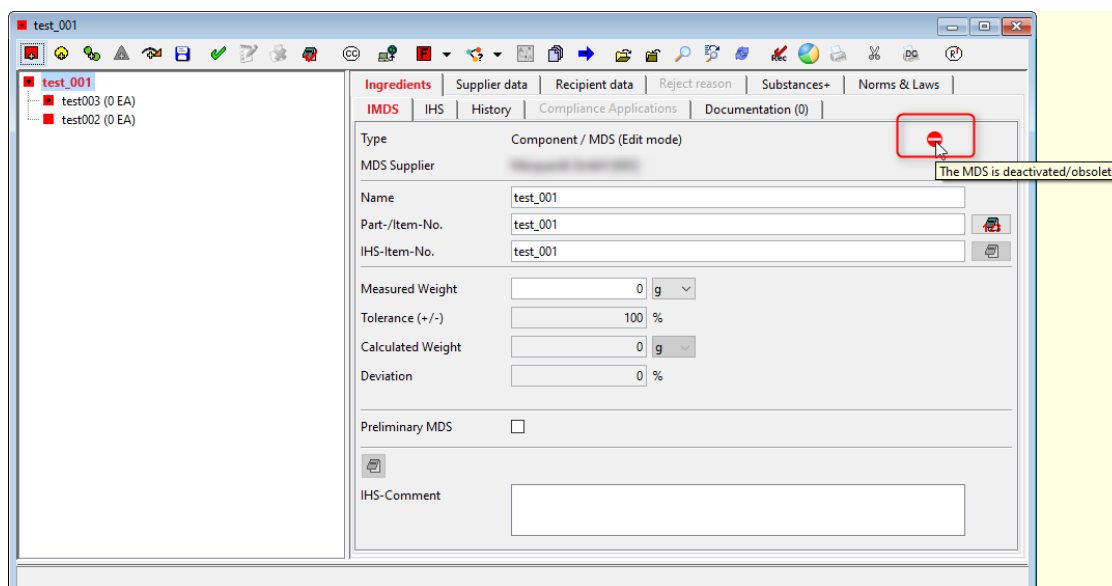


Figure 164 Deactivation/Obsolete tool tip

The following actions are available:

- **Activate (only for searches with "Deactivated" = yes)**
The selected (deactivated) MDS/module will be activated again, all associated MDS/modules will be activated as a result.
- **Deactivate (only for searches with "Deactivated" = no)**
The selected MDS/module will be deactivated, all associated MDS/modules will be deactivated as a result.

- **Export**

Export the search results list

PLEASE NOTE: If an own MDS/module is either deactivated or reactivated, an upload job will be created to change the status in the Online IMDS system. The status will be updated in the IHS system with the next download from IMDS, to reflect it is now obsolete.

External MDS's that are deactivated in the IHS system, will only be shown as deactivated in the IHS system. No upload job will be created and the status in the Online IMDS system will not be changed.

As a result of the above change, where an MDS/module has been deactivated, if it was identified as a MSP (Multi Sourced Part) this flag will be removed (if applicable). The same applies if a MDS/module is deactivated and made active, the flag will be added (if applicable)

20.5 Bulk deactivation of IMDS datasheets (optional)

Number of wished IMDS datasheets can be deactivated by a simple import.

20.5.1 Import file format

For the IMDS datasheet bulk deactivation import, the import file must comply with the requirements detailed in the **Table 3**.

No.	Column Name	Mandatory	Length	Format	Comment
1	IMDS ID / Version	yes	50	alphanumeric	IMDS Module ID / IMDS Version (as provided from search result list export in iPCA)

Table 3 MDS bulk deactivation import file structure

20.5.2 Starting the import

Import screen can be accessed in iPCA via “**Data → Deactivate MDS, companies or org-units**”. This loads a dialog window (see **Figure 165**).

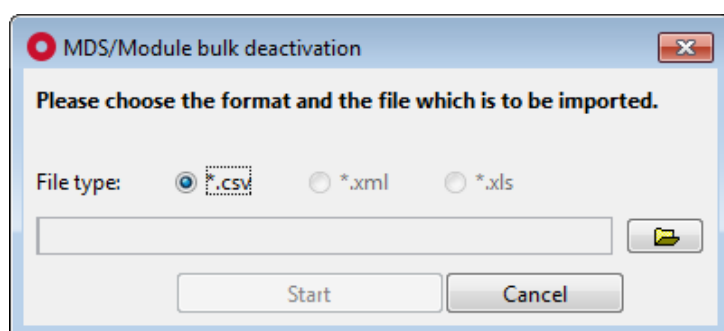


Figure 165 Dialog for start of the IMDS datasheet bulk deactivation

An import file needs to be selected by click on the  button. This loads standard open dialog window. Wished file can be confirmed by click on the “**Open**” button.

The “**Start**” button is enabled only in case that the import file is selected.

Upon the click on the “**Start**” button, the dialog will be shown to the user (see **Figure 166**).

By click on the “**Direct**” button, the deactivation will run in the frontend and user will not be able to use the application until the process is finished. Hence this is recommended only for deactivation of smaller number of IMDS datasheets.

By click on the “**Job**” button, the database job will be created and will run in the background

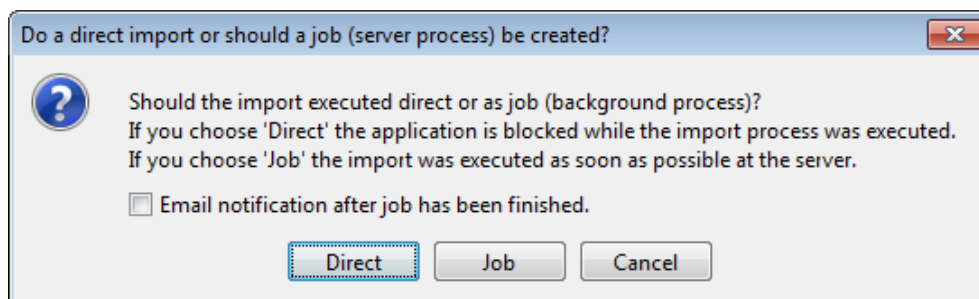


Figure 166 Question on how to proceed with IMDS datasheet bulk deactivation

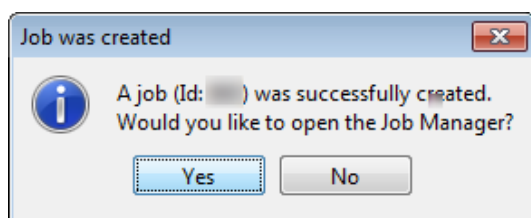


Figure 167 Information message that the IMDS datasheet bulk deactivation job has been created

PLEASE NOTE: Only user with activated permission “**`SORT_OUT_BULK`**” can access IMDS datasheet bulk deactivation import dialog window.

20.5.3 Import/deactivation process

The import file will be processed one row by another. Each row contains a reference to an IMDS datasheet defined by the IMDS ID and version.

For each picked row, the documentation in the IMDS datasheet bulk deactivation log is done. .

For each row, the below process will be performed.

First, it is checked if the IMDS datasheet (MDS or module) with given IMDS Module ID / IMDS version really exists

- If not, the processing of the row is finished, and the log entry is done
- If yes, it is checked if found IMDS datasheet is active (and not deleted or hidden or already deactivated)
 - If not, the processing of the row is finished, and the log entry is done
 - If yes, IMDS datasheet with given IMDS Module ID / IMDS version is deactivated

PLEASE NOTE: Version can be provided as 1 or 2, or also as 1.00 or 2.00.

In both cases the datasheet is identified and deactivated independent from the stored version format, for example:

- 123 / 1 entry will deactivate also 123 / 1.00
- 123 / 1.00 entry will deactivate also 123 / 1
- 123 / 1 entry will not deactivate 123 / 1.01

20.6 Import history

The history of IMDS datasheet bulk deactivation import could be seen in the „**Data → Import/Export Overview**“.

To see just IMDS datasheet bulk deactivation import, the type “**DS deactivation**” needs to be chosen.

For all details about “**Import/Export Overview**”, please refer to the **IHS user manual, chapter 19**.

21 DB Job Manager (optional)

21.1 Overview

The DB Job Manager can be used to monitor internal iPCA database (DB) jobs and retrieve their results, if applicable. DB jobs are created automatically by predefined processes, to avoid long running processes running in the front end and blocking the application. The processing is done in the database and therefore is independent from the client application. The user can continue to work with the application after starting an action, which results in the automatic creation of the DB.

The DB Job Manager is used for a variety of different processes, where processing time could be extensive.

The DB Job Manager panel can be opened by navigation to the menu “**Extras → DB Job Manager**”.

PLEASE NOTE: Only user who has at least one of following permissions granted to his profile can access DB job manager panel: **JOB_ADMIN**, **JOB_CANCEL**, **JOB_DELETE** and **JOB_RESULT**.

The DB Job Manager panels consists of tabs:

- DB Jobs (see **chapter 21.1**)
- DB Job History (see **chapter 21.2**)

21.2 DB Jobs

In this tab, all scheduled and active DB jobs are displayed.

The is split into three areas:

1. Search mask (orange) – see **chapter 21.2.1**
2. Result list (blue) – see **chapter 21.2.2**
3. Actions (green) - see **chapter 21.2.3**

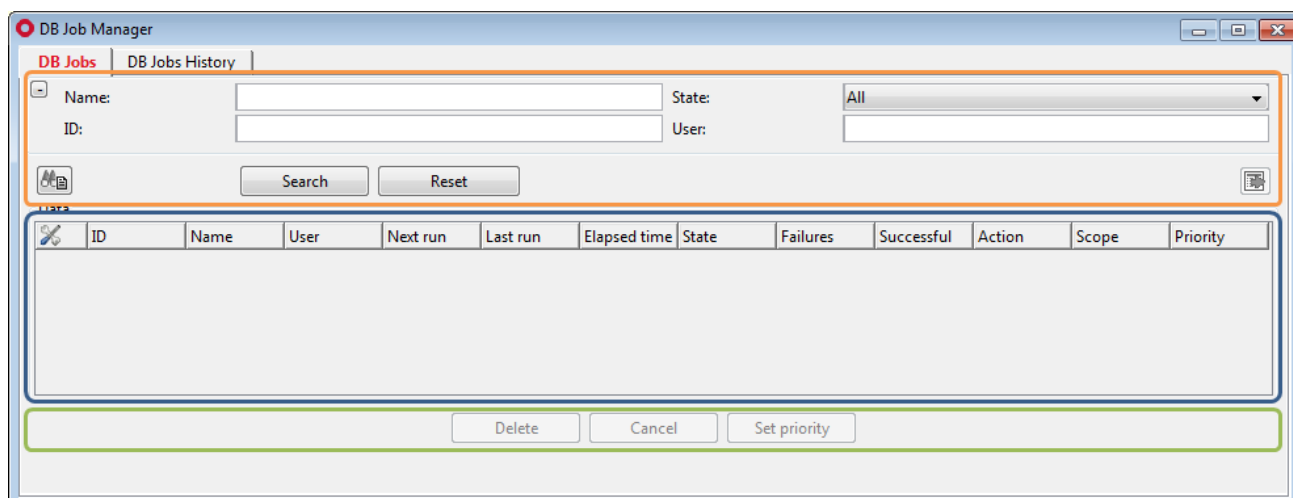


Figure 168 DB Job Manager – “DB Jobs” tab

21.2.1 Search mask

Enables to search for DB jobs based on defined search criteria.

The following search criteria are available:

- **Name**
Name of the DB job.
- **State**
Status of the DB job
 - All
 - Waiting
 - Running
 - Finished
 - Failed
 - Removed
 - Cancelled
- **ID**
ID of the DB job.
- **User**
Name of the user who created the DB job (using iPCA full name).

21.2.2 Result list

The result list displays DB jobs as per defined search criteria. Each row represents one DB job.

The following standard columns are available:

- **ID**
ID of the DB job.
- **Name**
Name of the DB job.
- **User**
Name of the user who created the DB job (using iPCA full name).
- **Next run**
Date and (estimated) time when the job will be executed.
- **Last run**
Date and time when the job was last time executed.
This is populated only for cyclical DB jobs.
- **Elapsed time**
Actual elapsed time of the DB job.

- **State**
Status of the DB job.
- **Failures**
Number of times the DB job failed.
This is populated only for cyclical DB jobs.
- **Successful**
Number of times the DB job finished successfully.
This is populated only for cyclical DB jobs.
- **Action**
Actual activity being done – supported by only certain DB jobs.
PLEASE NOTE: If the text “**ACCESS DENIED**” is displayed, the display of the actual activity of the DB job is not enabled because of not granted permission in the database (in most cases this was not allowed by database/infrastructure team in your company).
- **Scope**
Scope of the DB job
 - FRONTEND
 - BACKEND
- **Priority**
Priority of the DB job.
Possible values from 0 (lowest) to 9 (highest).

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 29**.

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

21.2.3 Actions

The following actions are available:

- **Delete**
Allows to delete scheduled DB job.
This will bring up a pop-up window. By click on the “**Yes**” button scheduled DB job will be deleted from the queue. By click on the “**No**” button, scheduled DB job will be kept in the queue.
PLEASE NOTE: Only user with activated permission “**JOB_DELETE**” can delete scheduled own DB job. User with activated permission “**JOB_ADMIN**” can delete any scheduled DB job.

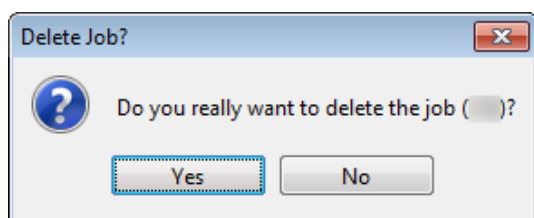


Figure 169 DB Job Manager - Dialog displayed prior deletion of the DB job

- **Cancel**

Allows to cancel running DB job.

This will bring up a pop-up window. By click on the “**Yes**” button running DB job will be cancelled.

By click on the “**No**” button, cancellation of running DB job will cancelled.

PLEASE NOTE: Only user with activated permission “**JOB_CANCEL**” can cancel running own DB job. User with activated permission “**JOB_ADMIN**” can cancel any running DB job.

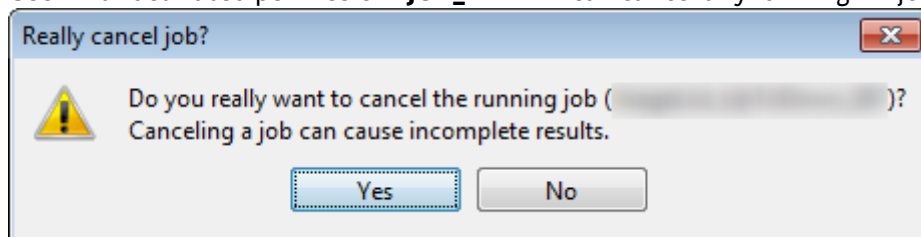


Figure 170 DB Job Manager - Dialog displayed prior cancellation of the DB job

- **Set priority**

Allows to set the priority of the DB job.

This will bring up a dialog. By setting wished DB job priority and click on the “**Set**” button the priority is set to selected DB job. This will cause that the DB job will be processed with priority or set to be run later, depending on the defined priority. By click on the “**Cancel**” button the priority of the DB job will not be changed.

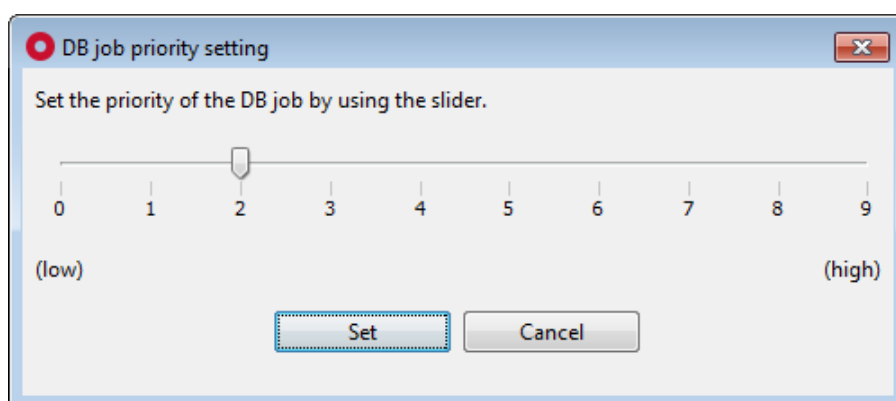


Figure 171 Panel for setting the priority of the DB job

21.3 DB Job History

In this tab, all scheduled and active DB jobs as well as all historical DB jobs are displayed.

The is split into three areas:

1. Search mask (orange) – see **chapter 21.3.1**
2. Result list (blue) – see **chapter 21.3.2**
3. Actions (green) - see **chapter 21.3.3**

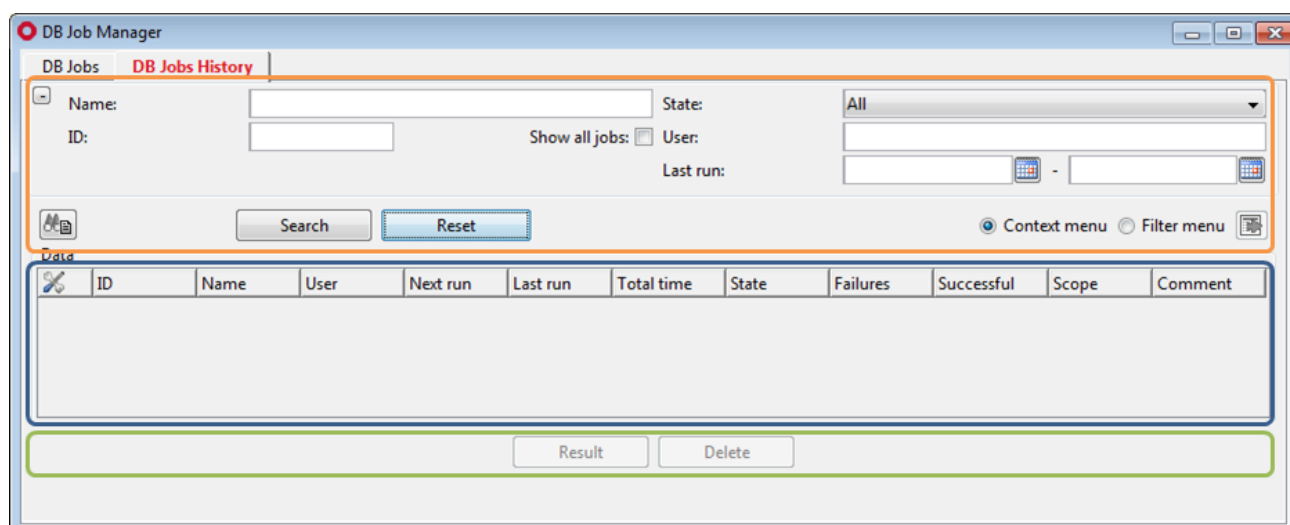


Figure 172 DB Job Manager - DB Job History

21.3.1 Search mask

Enables to search for DB jobs based on defined search criteria.

The following search criteria are available:

- **Name**
Name of the DB job.
- **State**
Status of the DB job
 - All
 - Waiting
 - Running
 - Finished
 - Failed
 - Removed
 - Cancelled
- **ID**
ID of the DB job.

- **Show all jobs**

If this checkbox is checked, also BACKEND DB jobs will be shown in the result list.

- **User**

Name of the user who created the DB job (using iPCA full name).

- **Last run**

Period in which the DB job run.

This can be changed either by manual modification of the date in the text field or by using  button and selecting the date from the calendar shown.

21.3.2 Result list

The result list displays DB jobs as per defined search criteria. Each row represents one DB job.

The following standard columns are available:

- **ID**

ID of the DB job.

- **Name**

Name of the DB job.

- **User**

Name of the user who created the DB job (using iPCA full name).

- **Next run**

Date and time when the job was executed.

- **Last run**

Date and time when the job was (last time) executed.

- **Total time**

Elapsed time of the DB job.

- **State**

Status of the DB job.

- **Failures**

Number of times the DB job failed.

Can be greater than 1 for cyclical DB jobs.

- **Successful**

Number of times the DB job finished successfully.

Can be greater than 1 for cyclical DB jobs.

- **Scope**

Scope of the DB job

- FRONTEND

- BACKEND
- **Comment**
Combest set for the DB job.

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 29**.

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

21.3.3 Actions

The following actions are available:

- **Result**
Allows to see result of the selected DB job.

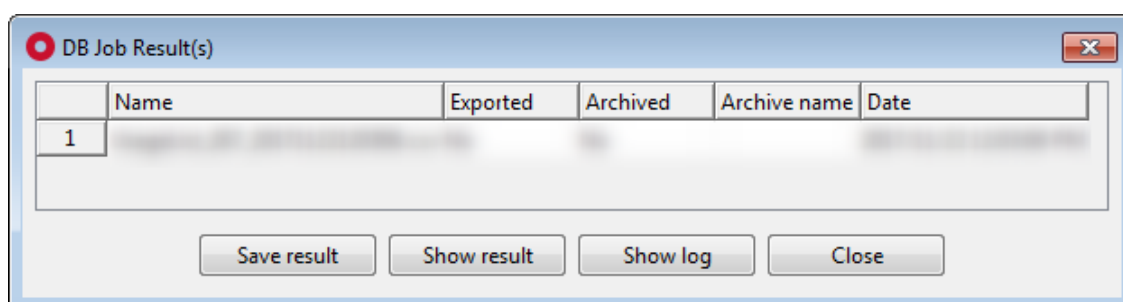


Figure 173 DB Job Manager – DB job result(s) panel

For standard DB jobs, only one record is displayed, however for cyclical jobs, there is as many records displayed as many times the DB job has run.

Upon selection of a record, below actions can be done by click on the individual buttons:

- **Save result**
Allows to save the result file created for the DB job (if applicable).

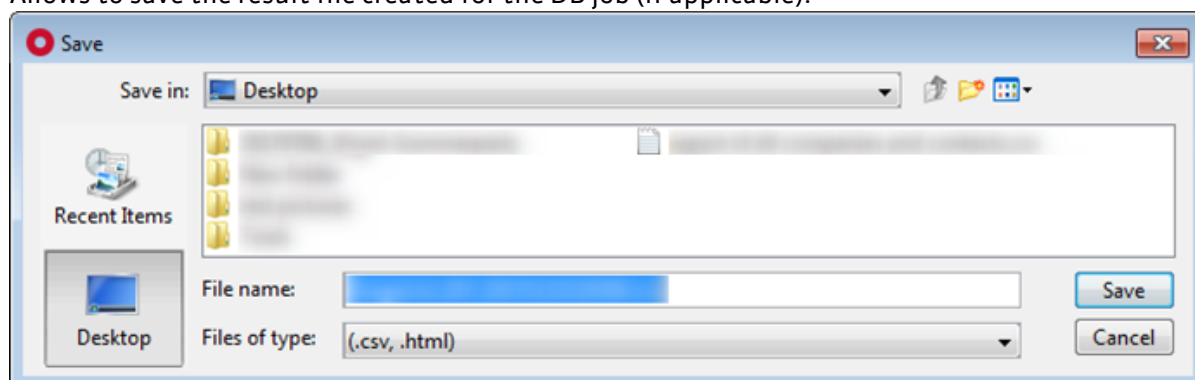


Figure 174 DB Job Manager – Save result

- **Show result**

Allows to show the result file in program set as default for the file type on the user PC.

PLEASE NOTE: If the file extension is not set in the name of the result file, the program associated with TXT files will be used to show the result file.

- **Show log**

Allows to display the log created for the DB job (if applicable).

In case the DB job do not have any log, the user is informed about it.

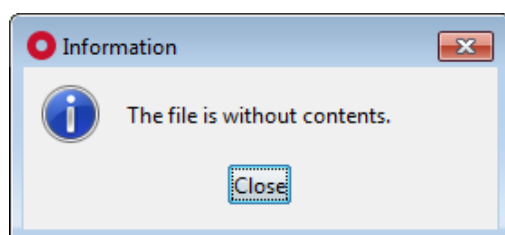


Figure 175 DB Job Manager – No log available

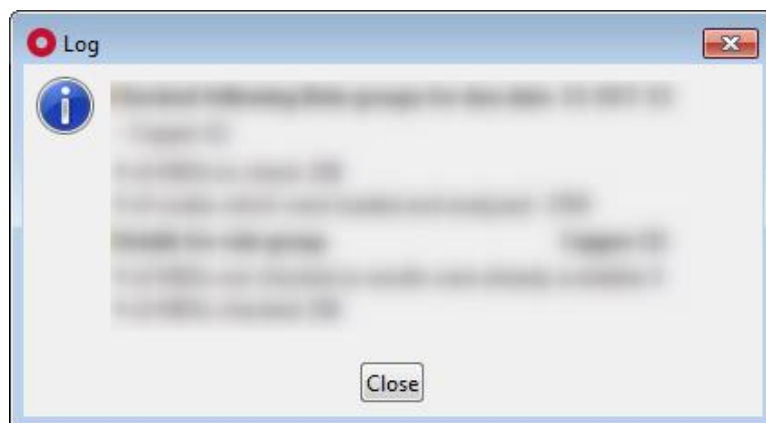


Figure 176 DB Job Manager – Log

- **Delete**

Allows to delete DB job.

This will bring up a pop-up window. By click on the “**Yes**” button the DB job will be deleted from the queue. By click on the “**No**” button, the DB job will be kept in the queue.

PLEASE NOTE: Only user with activated permission “**JOB_DELETE**” can delete own DB job. User with activated permission “**JOB_ADMIN**” can delete any DB job.

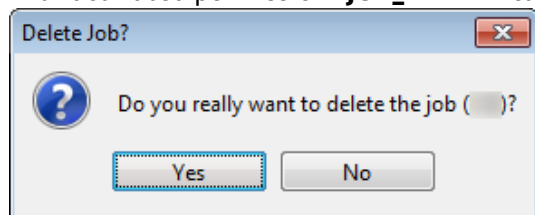


Figure 177 DB Job Manager – Dialog displayed prior deletion of the DB job

22 Prototype MDS (optional)

22.1 Overview

The function “Prototype MDS” is extended support for the creation of prototype MDS’s according to IMDS Recommendation 023.

The idea is to create a preliminary (not yet complete) MDS from an existing MDS as a reference. During the creation, the user can specify which sections should remain unchanged, and which sections should be displayed with prototype materials.

The parameters for the creation, have to be configured before use (see chapter 22.4 “Parameter”),

With the option prototype MDS (MDS’s where the flag Dev. Sample Report is set) are represented by special icons:

-  Components, which were created with the function “prototype MDS”
-  Semi components, which were created with the function “prototype MDS”

More functions which are available, together with this option are documented in the manuals for iPCA/SPM and iPCA/LCM.

If the so called “prototype materials” are required during the process, they are determined as described in IMDS Recommendation 023:

- Material name: “ProtMat**”
- MDS Supplier: “IMDS Committee”, ID 423
- Dev. Sample Report = Yes

22.2 Process

Prior to the creation of a prototype MDS, the “original” MDS must be error-free.

Then the creation process can be started with the function “Create prototype”.

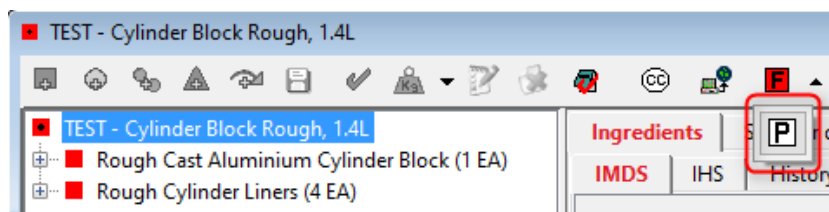


Figure 178 Start prototype creation

A window is opened that shows the structure of the active MDS:

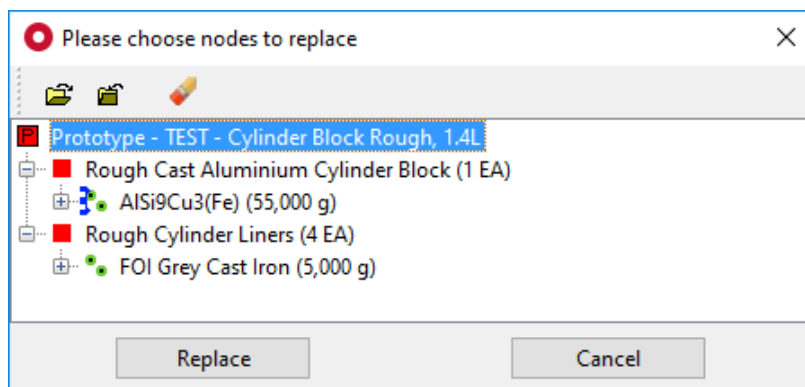


Figure 179 Selection window for prototype creation

In the selection window the MDS/modules that should be shown as prototype materials, can be selected. All other MDS/modules are carried over without change.

All MDS/modules that should be shown as a prototype material, have to be marked.

The following rules apply:

- Multi selections are possible with holding down the <CTRL> key and selecting the nodes with your mouse button.
- A selected node can be deselected, by clicking it again
- Selection of a child node is not possible, if one of its parents is already selected. Deselect the parent first, if you would like to select the child
- This also applies the other way around – if a child node is selected, its parents cannot be selected
- If the root node is selected, no other nodes can be selected and the process will result in a FBOM of ProtMats.
- Selecting the icon  (Deselect all) all current selections are removed

If the selections are completed, the prototype MDS will be created, by selecting “Replace”. Selecting the “Cancel” button, the window will be closed and the process will be cancelled.

PLEASE NOTE: The selection of MDS/modules is only possible for the levels until the first referenced MDS/module, otherwise MDS/modules in between would also have to be converted.

The following activities are executed by the process:

- Creation of a MDS/module with the flag “Dev. Sample Report”
- Marking of that MDS as prototype
- Unchanged carry over of the not selected areas, of the original MDS
- Execution of a detailed analyses of the selected areas, creation of simple nodes according to the original MDS (but without part number) and referencing the prototype materials according to the information from the detailed analysis (with respect to configured parameters)
- Creation of a correlation between the prototype MDS and the original MDS

The prototype MDS can now be edited as usual, and if necessary, sent.

22.3 Managing prototype MDS's

If the prototype process is started using an MDS/module where a prototype MDS has already been created, the following dialogue will be shown:

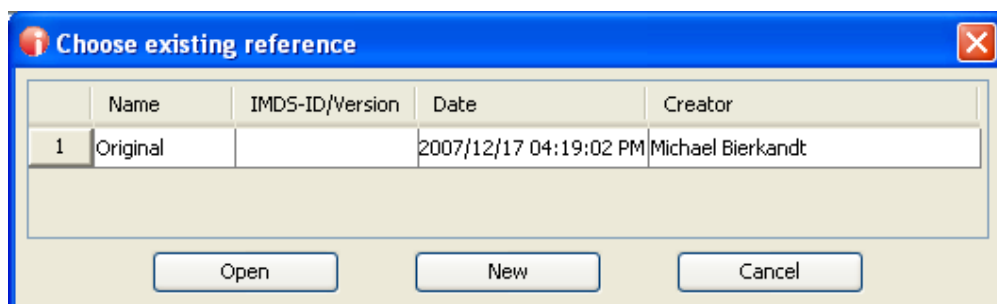


Figure 180 Selection of existing prototype references

The list contains all prototype MDS's which have been created for the current MDS.

The following actions are available:

- **Open**
An existing prototype can be selected and opened
- **New**
A new process for prototype creation is started
- **Cancel**
The dialogue is closed without the creation of a new prototype MDS

If a prototype MDS is open, the original MDS can be retrieved by clicking on the icon for the prototype process. The original MDS is then opened in a new window.

22.4 Parameter

All the necessary parameters for the prototype process can be configured with the dialogue "Prototype parameter" (Menu: Extras → Parameter → Prototype Parameter):

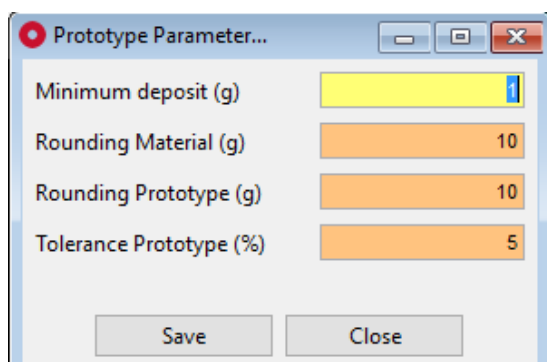


Figure 181 Prototype parameters

The following parameters can be configured:

- **Minimum deposit (g)**
Setup for minimal weight.
If a summed up weight of a material classification does not exceed the minimum deposit, the material classification is not used during prototype creation
- **Rounding Material (g)**
Setup for rounding of material classifications.
To avoid too specific weights, the summed up weights of the many material classifications can be rounded.
Example: 10 g is configured → The weights of all occurring material classifications are rounded up or down to 10 g
- **Rounding Prototype (g)**
Setup for rounding of prototype MDS
To avoid too specific weights, the summed up weights for the prototype MDS can be rounded.
Example: 10 g is configured → The weight for the prototype is rounded up or down to 10 g
- **Tolerance Prototype (%)**
Setup for tolerance of prototype MDS
Example: 5 % → Tolerance = +/- 5 %

With the “Save” button, the configuration is stored. The “Close” button, closes the dialogue box without saving the changes.

23 Master Data (optional)

The purpose of the master data management, is to maintain all customer specific master data. Available options depend on modules licensed by your company and individual extensions (if applicable).

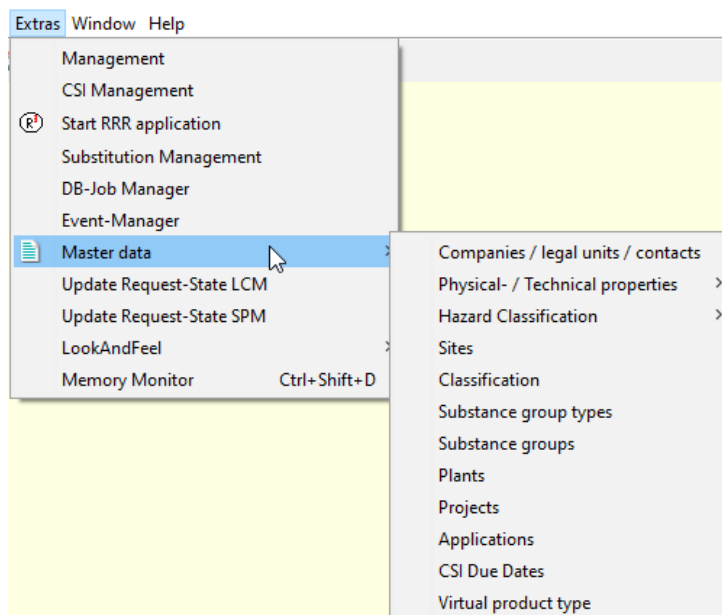


Figure 182 Master data options

The following types of master data can be maintained:

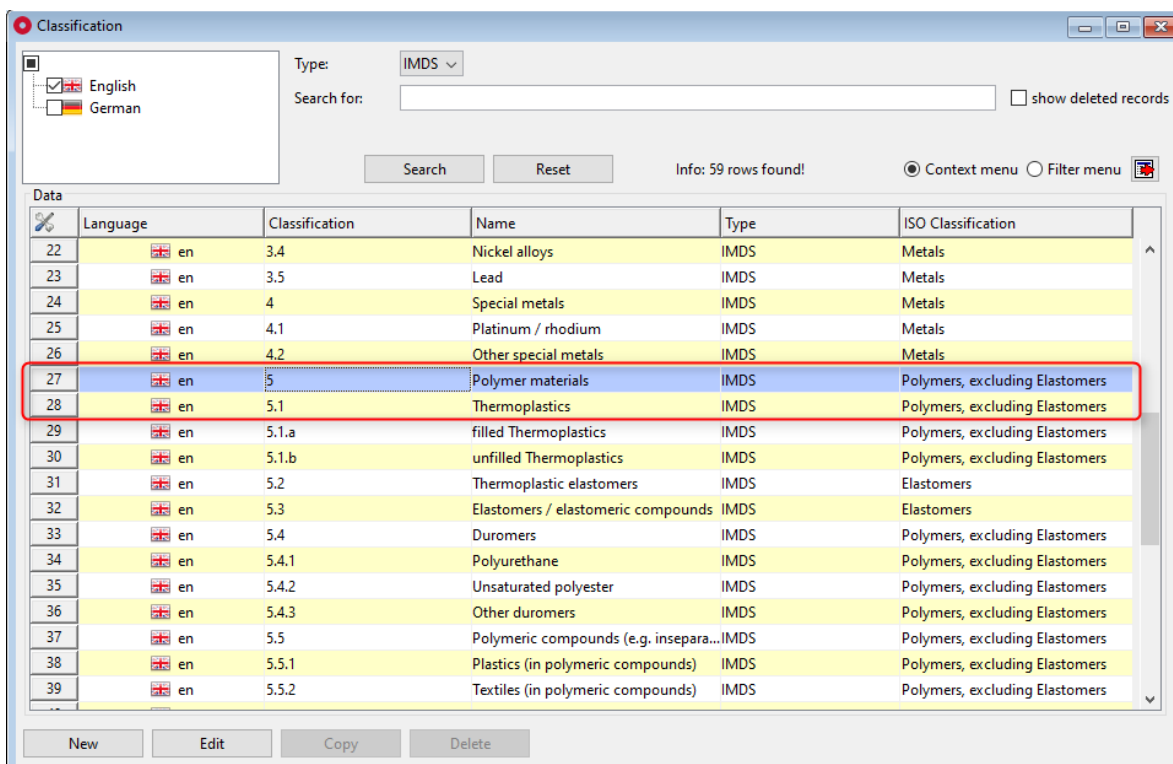
- **Companies / legal units / contacts**

Managing your own companies and the contact persons and extended information for the given company data

PLEASE NOTE: If the “**ADMIN_REACH_LEGAL_UNIT**” permission is not granted to the user, the label is “**Companies / contacts**”.

- **Classification**

Viewing VDA and ISO classifications and managing your own material classifications. This is only possible if the user has the permission **ADMIN_IHS_CLASSIFICATION**. If the user has the permission **EDIT_IMDS_CLASSIFICATION** the mapping of the VDA classification can be changed. The maximum length of the classification ID is 50 characters.



Classification

Type: IMDS

Search for: ☐ show deleted records

Search Reset Info: 59 rows found! ☒ Context menu ☐ Filter menu

Data	Language	Classification	Name	Type	ISO Classification
22	en	3.4	Nickel alloys	IMDS	Metals
23	en	3.5	Lead	IMDS	Metals
24	en	4	Special metals	IMDS	Metals
25	en	4.1	Platinum / rhodium	IMDS	Metals
26	en	4.2	Other special metals	IMDS	Metals
27	en	5	Polymer materials	IMDS	Polymers, excluding Elastomers
28	en	5.1	Thermoplastics	IMDS	Polymers, excluding Elastomers
29	en	5.1.a	filled Thermoplastics	IMDS	Polymers, excluding Elastomers
30	en	5.1.b	unfilled Thermoplastics	IMDS	Polymers, excluding Elastomers
31	en	5.2	Thermoplastic elastomers	IMDS	Elastomers
32	en	5.3	Elastomers / elastomeric compounds	IMDS	Elastomers
33	en	5.4	Duromers	IMDS	Polymers, excluding Elastomers
34	en	5.4.1	Polyurethane	IMDS	Polymers, excluding Elastomers
35	en	5.4.2	Unsaturated polyester	IMDS	Polymers, excluding Elastomers
36	en	5.4.3	Other duromers	IMDS	Polymers, excluding Elastomers
37	en	5.5	Polymeric compounds (e.g. insepara...	IMDS	Polymers, excluding Elastomers
38	en	5.5.1	Plastics (in polymeric compounds)	IMDS	Polymers, excluding Elastomers
39	en	5.5.2	Textiles (in polymeric compounds)	IMDS	Polymers, excluding Elastomers

New Edit Copy Delete

Figure 183 Classifications

NOTE: All IMDS classifications are available, and includes Parent and Obsolete classifications

- **Geography** (see chapter 23.2)
- **Norms**
- **Substance group types** (see chapter 23.3)
- **Substance groups** (see chapter 23.4)
- **Plants and Projects** (for details see LCM or SPM manual)
- **Applications**
- **Regions and Organisations** (see chapter 23.5)
- **CSI Due dates**
- **Virtual Product types** (see VPM manual)
- **Check categories**
- **Manage AIC Whitelist Tasks**

23.1 Companies / legal units / contacts

To manage the companies / legal units / contacts, panel for management needs be opened by navigation to the menu “**Extras → Master data → Companies / legal units / contacts**”.

PLEASE NOTE: Only user with activated permission “**IHS_COMPANIES_MANAGEMENT_VIEW**” or “**IHS_CONTACT_MANAGEMENT_VIEW**” or “**ADMIN_REACH_LEGAL_UNIT**” can access companies / legal units / contacts master data panel (in view only mode).

The panel for management of the companies / legal units / contacts is split into three areas:

1. Search mask (orange) – see **chapter 23.1.1**
2. Result list (blue) – see **chapter 23.1.2**
3. Actions (green) - see **chapter 23.1.3**

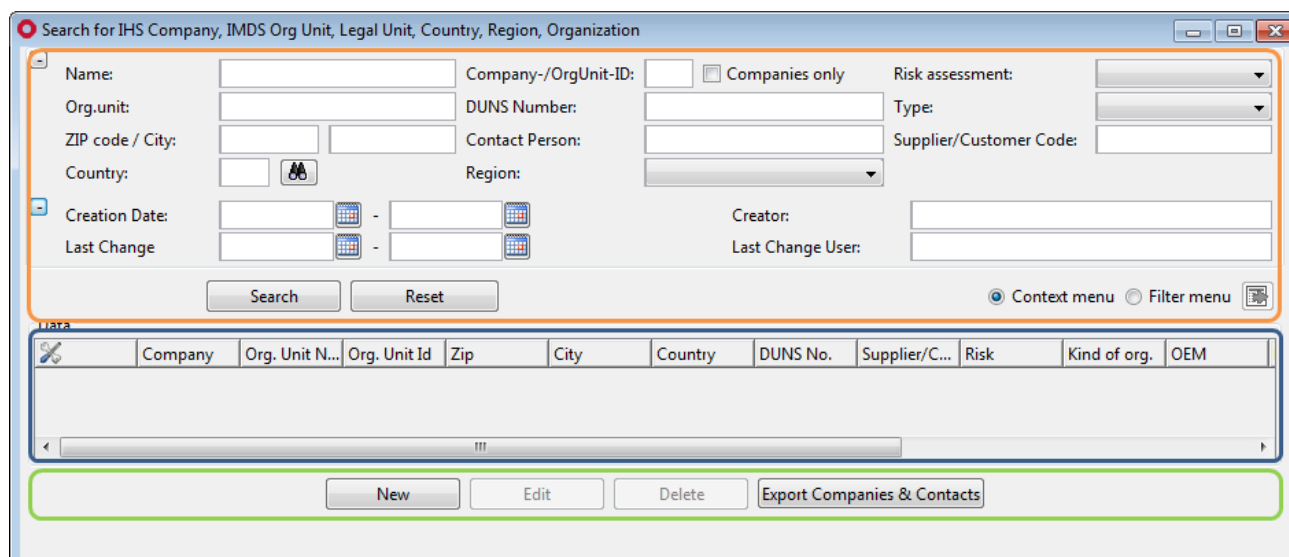


Figure 184 Companies / legal units / contacts master data panel

23.1.1 Search mask

Enables to search for companies based on defined search criteria.

The following search criteria are available:

- **Name**
Name of the company / legal unit.
- **Company-/OrgUnit-ID**
ID of the company / organization unit / legal unit.
- **Companies only**
This checkbox is unchecked by default:
 - If the checkbox is checked, the search considers only parent companies.
 - If the checkbox is unchecked, the search considers all companies.

- **Risk assessment**

Risk assessment assigned to the company:

- Non risk
- Low risk
- Medium risk
- High risk

- **Org.unit**

Name of the organization unit.

- **DUNS Number**

DUNS Number of the company / organization unit / legal unit.

- **Type**

Type of the company / organization unit / legal unit:

- IHS Company
- IMDS Organization Unit
- Legal unit (this is displayed only when “**ADMIN_REACH_LEGAL_UNIT**” permission is granted to the user)
- Country
- Region
- Organization

- **ZIP code**

Zip code of the company / organization unit / legal unit.

- **City**

City of the company / organization unit / legal unit.

- **Contact Person**

Contact person assigned to the company / organization unit / legal unit.

- **Supplier/Customer Code**

Supplier / Customer code assigned to the company / organization unit / legal unit.

- **Country**

Country of the company / organization unit / legal unit.

Country can be chosen using the  button, which will load country panel. Wished country can be then confirmed by click on the “**Apply**” button.

- **Region**

Region of the company / organization unit / legal unit:

- Africa
- Antarctica
- Asia
- Europe
- North America
- Oceania

- South America
- Unknown
- **Creation Date**
Period in which the record was created.
This can be defined either manually in the text fields or by using  button and selecting the date from the calendar shown.
- **Creator**
Name of the user who created the record (using iPCA username).
Name of the record created by a system (e.g. by import) is “**IPCA**”.
- **Last Change**
Period in which the record was last time changed.
This can be defined either manually in the text fields or by using  button and selecting the date from the calendar shown.
- **Last Change User**
Name of the user who updated the record (using iPCA username).
Name of the record updated by a system (e.g. by import) is “**IPCA**”.

The following actions are available:

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

23.1.2 Result list

The result list displays companies / legal units as per defined search criteria. Each row represents one company / legal unit.

The following standard columns are available:

- **Company**
Name of the company / legal unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**” or no value is selected in the “**Type**” drop-down list.
- **Org. Unit Name**
Name of the organization unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**”, “**Legal unit**” or no value is selected in the “**Type**” drop-down list.

- **Org. Unit Id**
ID of the company / organization unit / legal unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**”, “**Legal unit**” or no value is selected in the “**Type**” drop-down list.
- **Zip**
Zip code of the company / organization unit / legal unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**”, “**Legal unit**” or no value is selected in the “**Type**” drop-down list.
- **City**
City code of the company / organization unit / legal unit.
This column is displayed only if “**IHS Company**”, “**Organization Unit**”, “**Legal unit**” or no value is selected in the “**Type**” drop-down list.
- **Country**
Country of the company / organization unit / legal unit.
This column is displayed only if “**IHS Company**”, “**IMDS Org Unit**”, “**Legal unit**” or no value is selected in the “**Type**” drop-down list.
- **DUNS No.**
DUNS of the company / organization unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**” or no value is selected in the “**Type**” drop-down list.
- **Supplier/Customer Codes**
Supplier / Customer code assigned to the company / organization unit.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**” or no value is selected in the “**Type**” drop-down list.
- **Risk**
Risk assigned to the company / organization unit / country / region / organization.
This column is displayed only if “**IHS Company**”, “**IMDS Organization Unit**”, “**Country**”, “**Region**”, “**Organization**” or no value is selected in the “**Type**” drop-down list.
- **Kind of org.**
Type of company.
This column is displayed only if no value is selected in the “**Type**” drop-down list.
- **OEM**
Flag determining if the IMDS company is an OEM company or not.
This column is displayed only if “**IMDS Organization Unit**” or no value is selected in the “**Type**” drop-down list.
- **Region**
Region of the company / organization unit / legal unit.
This column is displayed only if “**IMDS Organization Unit**”, “**Country**”, “**Region**”, “**Organization**” or no value is selected in the “**Type**” drop-down list.

- **Creation date**
Date of the creation of the record.
This column is displayed for any and no value is selected in the “**Type**” drop-down list.
- **Creator**
Name of the user who created the record.
This column is displayed for any and no value is selected in the “**Type**” drop-down list.
- **Last change**
Date of the last update of the record.
This column is displayed for any and no value is selected in the “**Type**” drop-down list This column is displayed for any and no value is selected in the “**Type**” drop-down list.
- **Parent Org.Unit**
Parent organization unit of the company.
This column is displayed only if “**IHS Company**” is selected in the “**Type**” drop-down list.

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 31**.

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

23.1.3 Actions

The following actions are available:

- **New**
Allows to create new non-IMDS company (see **chapter 23.1.3.1**).
- **Edit / View**
Allows to edit / display the details of the record (see **chapter 23.1.3.2**).
- **Delete**
Allows to delete selected record(s) (see **chapter 23.1.3.3**).
- **Export Companies & Contacts**
Allows to export companies (and contacts) (see **chapter 23.1.3.4**).

23.1.3.1 New

New “**IHS Company**” can be created by click on the “**New**” button.

This open the new panel with “**Company data**” tab enabled and focused.

Following information must/could be defined:

- **Name**
Name of the company.

This is mandatory field.

- **ID**
ID of the company.
The ID of the company is generated by the system.

- **Street**
Street of the company.

- **ZIP code**
ZIP code of the company.

- **City**
City of the company.
This is mandatory field.

- **Mailbox**
Mailbox of the company.

- **Country**
Country of the company.

Country can be chosen using the  button, which will load country panel. Wished country can be then confirmed by click on the “**Apply**” button.
This is mandatory field.

- **Type of Organization Unit**
Type of organization unit of the company.

- **DUNS Number**
DUNS number of the company.

- **Communication language**
Language for the correspondence used for the company.

Language for the correspondence can be defined using the  button. This loads a dialog window with languages. Wished language can be then selected and confirmed by click on the “**OK**” button.



Figure 185 Dialog for definition of language for correspondence

Language for the correspondence can be removed using the  button.

- **Examination Office**
Examination office flag.

- **Country (corrected)**
Corrected country of the company.

Corrected country can be defined using the  button. This loads a panel allowing to search of countries. Wished country can be then selected and confirmed by click on the “**Apply**” button.

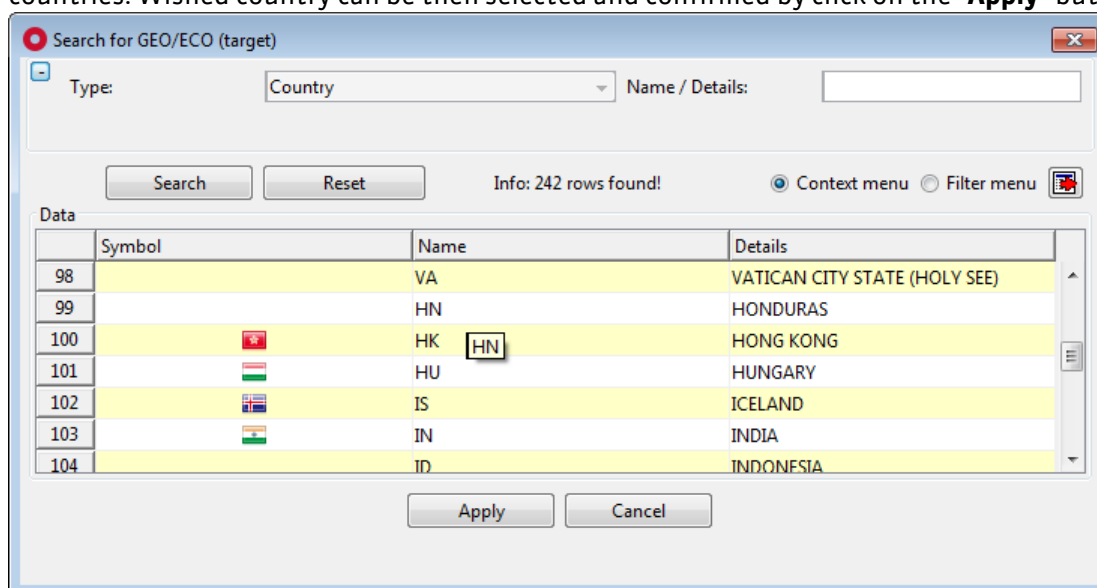


Figure 186 Panel for definition of corrected country

Corrected country can be removed using the  button.

- **Supplier/Customer Codes**
Supplier / customer codes of the company.

Supplier / customer code can be defined using the  button. This loads a dialog window allow definition of the wished supplier / customer code and confirmed by click on the “**Apply**” button.

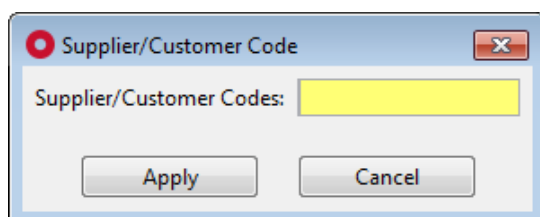


Figure 187 Dialog for definition of supplier/customer code for the company

Selected supplier / customer code can be removed using the  button.

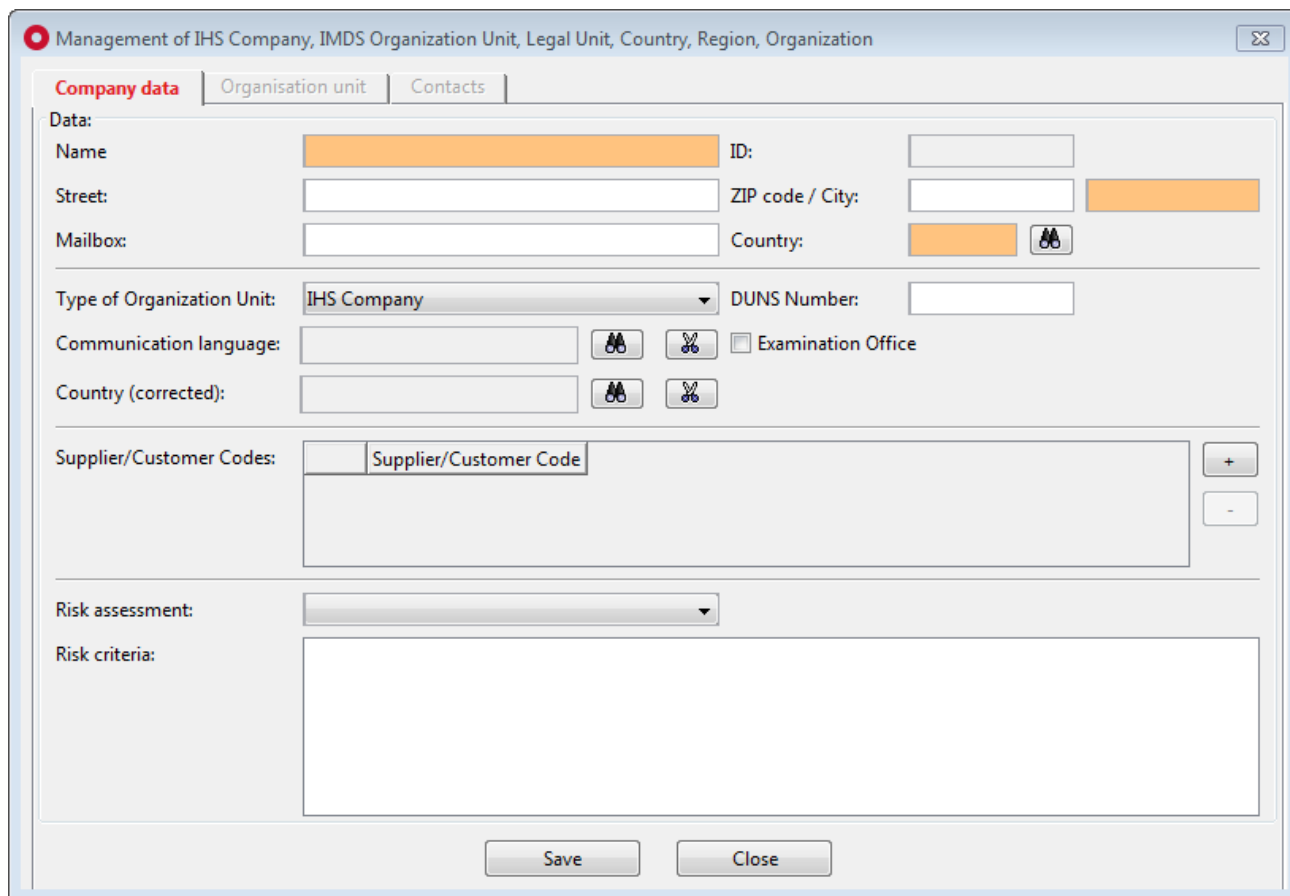
- **Risk assessment**

Risk assessment of the company:

- Non risk
- Low risk
- Medium risk
- High risk

- **Risk criteria**

Risk criteria of the company.



Management of IHS Company, IMDS Organization Unit, Legal Unit, Country, Region, Organization

Company data | Organisation unit | Contacts

Data:

Name: ID:

Street: ZIP code / City:

Mailbox: Country: 

Type of Organization Unit: DUNS Number:

Communication language:   ☐ Examination Office

Country (corrected):  

Supplier/Customer Codes:

Supplier/Customer Code

Risk assessment:

Risk criteria:

Figure 188 Companies / legal units / contacts – Creation of new company

Once all details are defined, the company can be created using “**Save**” button. To cancel creation of the company, the “**Close**” button is used.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown.

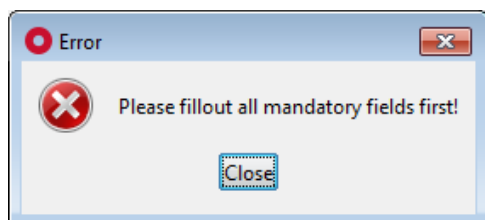


Figure 189 Error message shown on save of new company if not all mandatory details are defined

PLEASE NOTE: Only user with activated permission “**IHS_COMPANIES_MANAGEMENT_CREATE**” can create new IHS company.

23.1.3.2 Edit / View

Label and function of this button is interactive:

- If the permission “**IHS_COMPANIES_MANAGEMENT_VIEW**” is granted to the user, the label of this button is “**View**”
- If the permission “**IHS_COMPANIES_MANAGEMENT_EDIT**” is granted to the user, the label of this button is “**Edit**”

The details of the selected company can be displayed by click on the “**View**” button or modified by click on the “**Edit**” button. This load a company panel populated with details of a selected company and they could be changed or new organization unit can be created or existing organization unit can be edited or deleted.

The company panel consist of three tabs and it is opened with either “**Company data**” or “**Organisation unit**” tab activated, depending on the record selected:

- **Company data**
Display details about the parent company and allows to change them (see **chapter 23.1.3.2.1**). Company panel is opened with “**Company data**” tab activated if the parent company record was selected in the result list.
- **Organisation Unit**
Display details about the organisation unit(s) and allows to change them and create new one(s) (see **chapter 23.1.3.2.2**). Company panel is opened with “**Organisation unit**” tab activated if the organisation unit company record was selected in the result list.
- **Contacts**
Display details about company / organisation unit(s) contact(s) and allows to change them and create new one(s) (see **chapter 23.1.3.2.3**).

23.1.3.2.1 Company Data

The attributes displayed in the panel are the same ones as detailed in **chapter 23.1.3.1**.

However, in case of company of the type “**IMDS Org Unit**”, one more attribute is displayed:

- **OEM**

If this checkbox is checked, the company is an OEM company in IMDS online system, otherwise it is a supplier company.

The attributes that can be changed depend on the type of the edited company:

- **IMDS Organization Unit**

Only below listed attributes can be edited and changed:

- Communication language
- Examination Office
- Country (corrected)
- Supplier/Customer Codes
- Risk assessment
- Risk criteria

- **IHS Company**

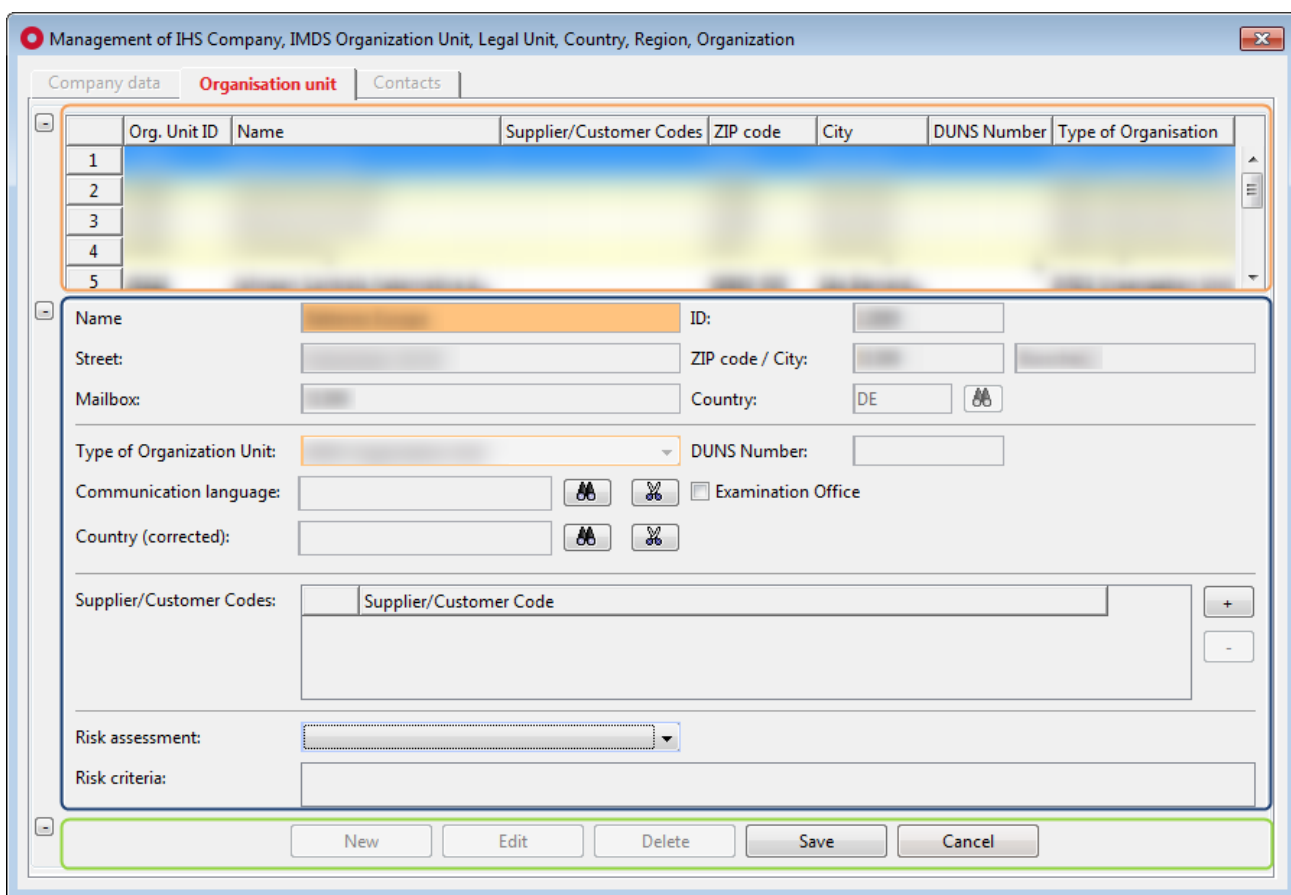
All the attributes described in the **chapter 23.1.3.1** can be edited and changed.

23.1.3.2.2 Organisation Unit

By default, this panel is activated in view mode.

The panel is split into three areas:

1. Overview of organisation units (orange) - see **chapter 23.1.3.2.2.1**
2. Organisation unit details (blue) - see **chapter 23.1.3.2.2.2**
3. Actions (green) - see **chapter 23.1.3.2.2.3**



Management of IHS Company, IMDS Organization Unit, Legal Unit, Country, Region, Organization

Company data **Organisation unit** Contacts

	Org. Unit ID	Name	Supplier/Customer Codes	ZIP code	City	DUNS Number	Type of Organisation
1							
2							
3							
4							
5							

Name: ID:

Street: ZIP code / City:

Mailbox: Country: DE 

Type of Organization Unit: DUNS Number:

Communication language:   ☐ Examination Office

Country (corrected):  

Supplier/Customer Codes: Supplier/Customer Code

Risk assessment:

Risk criteria:

Figure 190 Companies / legal units / contacts – Organisation unit tab

23.1.3.2.2.1 Overview of organisation units

Upon selection of the organisation unit, all its details are displayed in the organisation unit details area below.

Following information is available:

- **Org.Unit ID**
ID of the organisation unit.

- **Name**
Name of the organisation unit.
- **Supplier/Customer Codes**
Supplier / customer code(s) assigned to the organisation unit.
- **ZIP code**
ZIP code of the organisation unit.
- **City**
City of the organisation unit.
- **DUNS Number**
DUNS number of the organisation unit.
- **Type of Organisation**
Type of the organisation unit.

23.1.3.2.2.2 Organisation unit details

Displays the details of the selected organisation unit or allows to create new organisation unit.

The attributes displayed in the panel are the same ones as detailed in **chapter 23.1.3.1**.

However, in case of organisation unit of the type “**IHS Company**” or “**Legal Unit**”, one more attribute is displayed:

- **Parent Org.Unit**
Parent organisation unit of the organisation unit.

23.1.3.2.2.3 Actions

The following actions are available:

- **New**
Allows to create new non-IMDS company (see **chapter 23.1.3.2.2.3.1**).
- **Edit**
Allows to edit of the record (see **chapter 23.1.3.2.2.3.2**).
- **Delete**
Allows to delete selected record (see **chapter 23.1.3.2.2.3.3**).
- **Save**
Allows to save new or edited record (see **chapter 23.1.3.2.2.3.4**).
- **Cancel**
Allows to cancel the creation or edit of the record (see **chapter 23.1.3.2.2.3.5**).

- **Close**

Allows to close the company panel (see **chapter 23.1.3.2.2.3.6**).

23.1.3.2.2.3.1 New

New “**IHS Company**” or “**Legal Unit**” can be created by click on the “**New**” button.

This activates the items in organisation unit details area.

Following information must/could be defined:

- **Name**

Name of the organisation unit.
This is mandatory field.

- **ID**

ID of the organisation unit.
The ID of the organisation unit is generated by the system

- **Street**

Street of the organisation unit.

- **ZIP code**

ZIP code of the organisation unit.

- **City**

City of the organisation unit.
This is mandatory field.

- **Mailbox**

Mailbox of the organisation unit.

- **Country**

Country of the organisation unit.

Country can be chosen using the  button, which will load country panel. Wished country can be then confirmed by click on the “**Apply**” button.
This is mandatory field.

- **Type of organization unit**

Type of the organisation unit:

- IHS Company
- Legal Unit

- **DUNS Number**

DUNS number of the organisation unit.

- **Parent Org.Unit**

Parent organisation unit of the organisation unit.

- **Communication language**

Language for the correspondence used for the organisation unit.

Language for the correspondence can be defined using the  button. This loads a dialog window with languages. Wished language can be then selected and confirmed by click on the “OK” button.



Figure 191 Dialog for definition of language for correspondence

Language for the correspondence can be removed using the  button.

- **Examination Office**
Examination office flag.

- **Country (corrected)**
Corrected country of the organisation unit.

Corrected country can be defined using the  button. This loads a panel allowing to search of countries. Wished country can be then selected and confirmed by click on the “Apply” button.

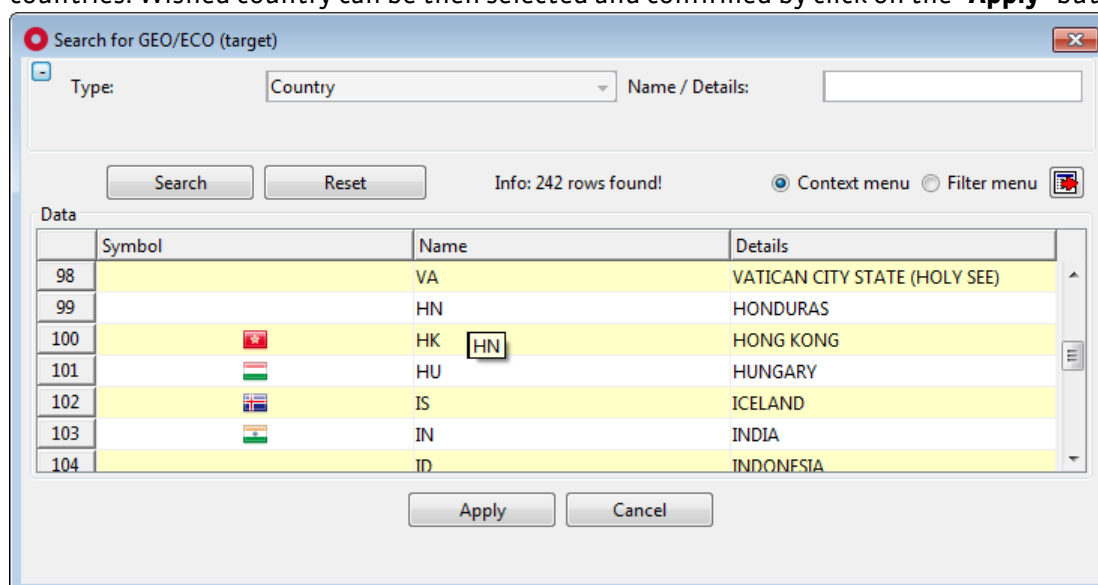


Figure 192 Panel for definition of corrected country

Corrected country can be removed using the  button.

- **Supplier/Customer Codes**

Supplier / customer codes of the organisation unit.

Supplier / customer code can be defined using the  button. This loads a dialog window allow definition of the wished supplier / customer code and confirmed by click on the “**Apply**” button.

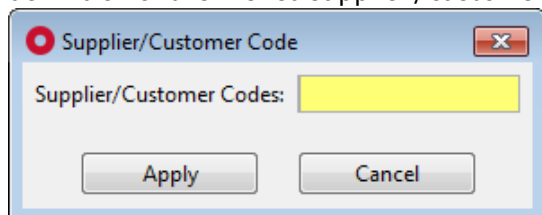


Figure 193 Dialog for definition of supplier/customer code for the company

Selected supplier / customer code can be removed using the  button.

- **Risk assessment**

Risk assessment of the organisation unit:

- Non risk
- Low risk
- Medium risk
- High risk

- **Risk criteria**

Risk criteria of the organisation unit.

Once all details are defined, the organisation unit can be created using “**Save**” button. To cancel creation of the organisation unit, the “**Close**” button is used.

The button is inactive in case the organisation unit is being created or edited.

PLEASE NOTE: Only user with activated permissions “**IHS_COMPANIES_MANAGEMENT_CREATE**” and “**IHS_COMPANIES_MANAGEMENT_EDIT**” can create new organisation unit.

23.1.3.2.3.2 Edit

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

The attributes that can be changed depend on the type of the edited company:

- **IMDS Organisation Unit**

Only below listed attributes can be edited and changed:

- Language for correspondence (at the moment SPM Emails)
- Examination Office
- Country (corrected)
- Supplier/Customer Code
- Risk assessment
- Risk criteria

- **IHS Company**

All the attributes described in the **chapter 23.1.3.1** can be edited and changed.

- **Legal Unit**

All the attributes described in the **chapter 23.1.3.1** can be edited and changed.

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

The button is inactive in case the organisation unit is being created or edited.

PLEASE NOTE: Only user with activated permission “**IHS_COMPANIES_MANAGEMENT_EDIT**” can organisation unit.

23.1.3.2.2.3.3 Delete

Selected organisation unit can be deleted upon the selection and click on the “**Delete**” button. This will bring up a small pop-up window. By click on the “**Yes**” button the organisation unit will be deleted. By click on the “**No**” button, the company will be kept.

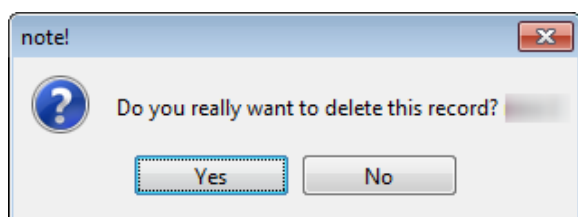


Figure 194 Confirmation of deletion of the company

The button is enabled only if company of type “**IHS Company**” or “**Legal Unit**” is selected.

The button is inactive also in case the organisation unit is being created or edited.

PLEASE NOTE: Only user with activated permission “**IHS_COMPANIES_MANAGEMENT_DELETE**” can delete the organisation unit.

23.1.3.2.2.3.4 Save

The button is active only in case the organisation unit is being created or edited.

By click on it new or updated organisation unit is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 195**).

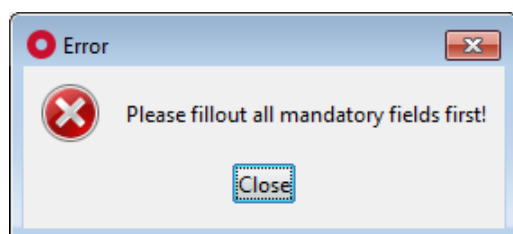


Figure 195 Error message shown on save of an organisation unit

23.1.3.2.2.3.5 Cancel

The button is active only in case the organisation unit is being created or edited.

By click on it creation or edit of the organisation unit is cancelled.

23.1.3.2.2.3.6 Close

Closes the company panel.

The button is inactive in case the organisation unit is being created or edited.

23.1.3.2.3 Contacts

By default, this panel is activated in view mode.

The panel is split into four areas:

1. Search mask (orange) - see **chapter 23.1.3.2.3.1**
2. Result list (blue) - see **chapter 23.1.3.2.3.2**
3. Contact details (green) - see **chapter 23.1.3.2.3.3**
4. Actions (black) - see **chapter 23.1.3.2.3.4**

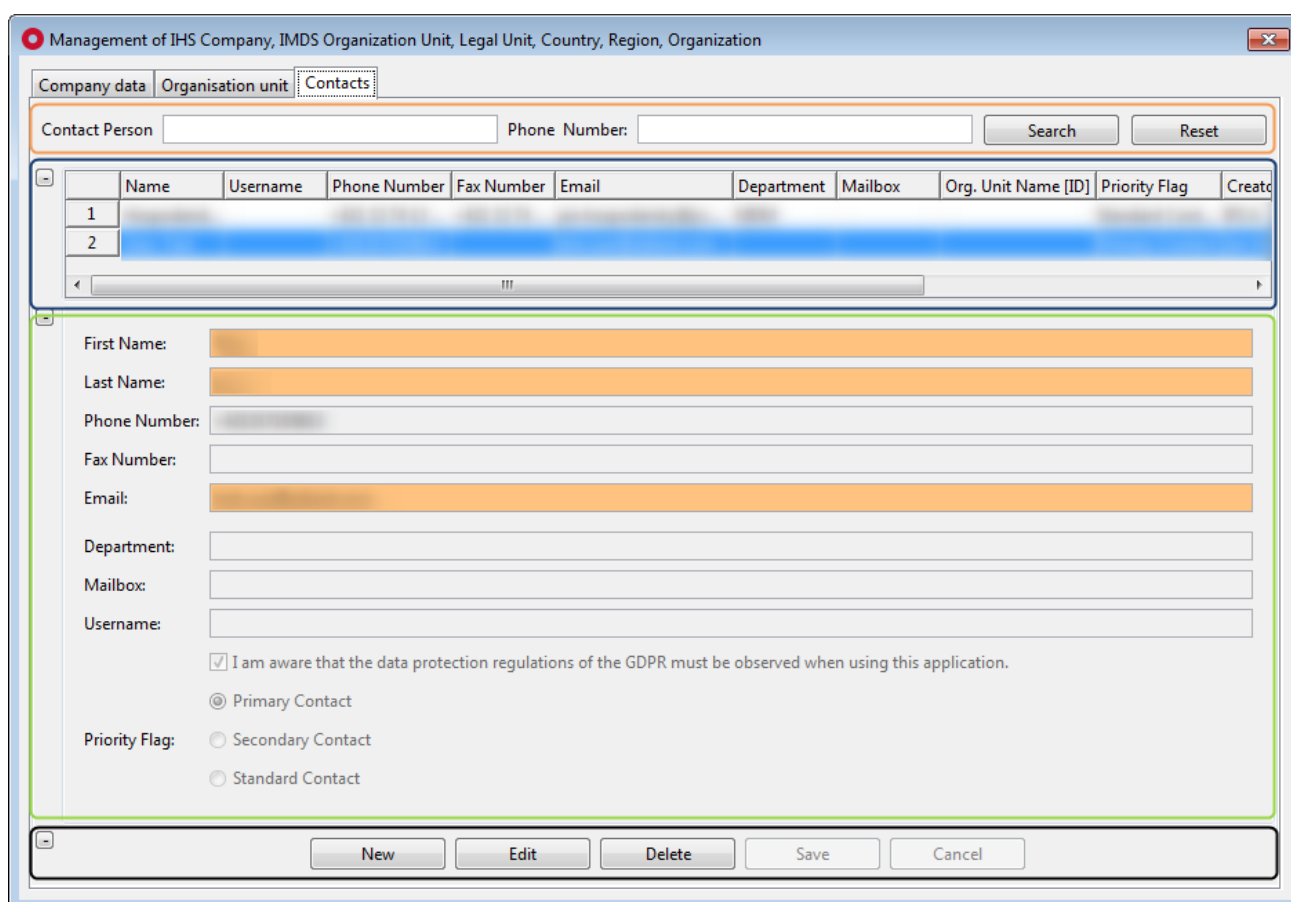


Figure 196 Companies / legal units / contacts – Contacts

PLEASE NOTE: Only user with activated permission “**IHS_CONTACT_MANAGEMENT_VIEW**” can access “**Contacts**” tab master data panel (in view only mode).

23.1.3.2.3.1 Search mask

Enables to search for contacts based on defined search criteria.

The following search criteria are available:

- **Contact Person**
Name of the contact person.
- **Phone Number**
Telephone number of the contact person.

The following actions are available:

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

23.1.3.2.3.2 Result list

The result list displays projects as per defined search criteria. Each row represents one contact person.

PLEASE NOTE: If the company panel was opened for an organization unit, only contacts assigned to this organization unit are displayed. If the company panel was opened for a parent company, all contacts, regardless of their assignment, are displayed.

Upon selection of the contact person, all its details are displayed in the contact person details area below.

The following standard columns are available:

- **Name**
Name of the contact.
- **Username**
Username of the iPCA user assigned to the contact.
- **Phone Number**
Telephone number of the contact.
- **Fax Number**
Fax number of the contact.
- **Email**
Email of the contact.
- **Department**
Department of the contact.

- **Mailbox**
Mailbox of the contact.
- **Org. Unit Name [ID]**
Organization unit name and ID the contact is assigned to.
- **Type**
Type of the contact:
 - IMDS
 - REACH
 - IHS
- **Priority Flag (optional)**
Priority flag of the contact:
 - Primary Contact
 - Secondary Contact
 - Standard Contact

This option is displayed only if the Contact Priority Module is licensed.
- **Creator**
Name of the user who created the contact (iPCA user name).
Name of the user if a contact was created by the IMDS daily download is “**IPCA**”.
- **Creation Date**
The date and time stamp of the creation of the contact.
- **Last Editor**
Name of the user who last updated the contact (iPCA user name).
Name of the user if a contact was updated by the IMDS daily download is “**IPCA**”.
- **Last Change**
The date and time stamp of the last update of the contact.

23.1.3.2.3.3 Contact details

Displays the details of the selected contact person or allows to create new contact person.

23.1.3.2.3.4 Actions

The following actions are available:

- **New**
Allows to create new non-IMDS company (see **chapter 23.1.3.2.3.4.1**).
- **View / Correct / Edit**
Allows to edit / display the details of the record (see **chapter 23.1.3.2.3.4.2**).

- **Delete**
Allows to delete selected record(s) (see **chapter 23.1.3.2.3.4.3**).
- **Save**
Allows to save new or edited record (see **chapter 23.1.3.2.3.4.4**).
- **Cancel**
Allows to cancel the creation or edit of the record (see **chapter 23.1.3.2.3.4.5**).
- **Close**
Allows to close the company panel (see **chapter 23.1.3.2.3.4.6**).

23.1.3.2.3.4.1 New

New contact person can be created by click on the “**New**” button.

Following information must/could be defined:

- **First Name**
First name of the contact.
- **Last Name**
Last name of the contact.
- **Phone Number**
Telephone number of the contact.
- **Fax Number**
Fax number of the contact.
- **Email**
Email address of the contact.
- **Department**
Department of the contact.
- **Mailbox**
Mailbox of the contact.
- **Username**
Username of the iPCA user of the contact.
- **I am aware that the data protection regulations of the GDPR must be observed when using this application.**
Checkbox confirming that the contact whose details are to be stored in the database agreed with this.
This checkbox must be checked to save the new contact.
- **Priority Flag (optional)**
Contact priority flag of the user.
This option is displayed only if the Contact Priority Module is licensed.

The type of the created contact is “**IHS**”.

PLEASE NOTE: Only user with activated permission “**IHS_CONTACT_MANAGEMENT_CREATE**” can create new contact.

23.1.3.2.3.4.2 View / Correct / Edit

Label and function of this button is interactive:

- If the permission “**IHS_CONTACT_MANAGEMENT_VIEW**” is granted to the user and contact of type “**IHS**” is selected, the label of this button is “**View**”
- If the permission “**IHS_CONTACT_MANAGEMENT_EDIT**” is granted to the user and the contact of type “**IMDS**” or “**REACH**” is selected, the label of this button is “**Correct**”
- If the permission “**IHS_CONTACT_MANAGEMENT_EDIT**” is granted to the user and the contact of type “**IHS**” is selected, the label of this button is “**Edit**”

The details of the selected contact can be modified by click on the “**Correct**” or “**Edit**” button.

The attributes that can be changed depend on the type of the edited contact type:

- **IMDS**
Only below listed attributes can be edited and changed:
 - Corrected e-mail
 - Checkbox “**I am aware that the data protection regulations of the GDPR must be observed when using this application.**”
 - Priority Flag
- **REACH**
Only below listed attributes can be edited and changed:
 - Corrected e-mail
 - Checkbox “**I am aware that the data protection regulations of the GDPR must be observed when using this application.**”
 - Priority Flag
- **IHS**
All the attributes described in the **chapter 23.1.3.2.3.4.1** can be edited and changed.

PLEASE NOTE: Checkbox “**I am aware that the data protection regulations of the GDPR must be observed when using this application.**” confirming that the contact whose details are to be stored in the database agreed with this must be checked to save the edited contact.

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

The button is inactive in case the contact is being created or edited.

PLEASE NOTE: Only user with activated permission “**IHS_CONTACT_MANAGEMENT_EDIT**” can organisation unit.

23.1.3.2.3.4.3 Delete

Selected contact can be deleted upon the selection and click on the “**Delete**” button. This will bring up a small pop-up window. By click on the “**Yes**” button the organisation unit will be deleted. By click on the “**No**” button, the company will be kept.

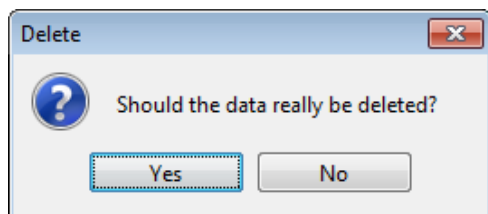


Figure 197 Confirmation of deletion of the contact

The button is enabled only if contact of type “**IHS**” is selected.

PLEASE NOTE: In case the IHS contact is not linked with any record (e.g. SEP request), the record is deleted physically from the database. Otherwise, the record is only flagged as deleted and, based on a regulation EU 2016/679 of the European Parliament, so called General Data Protection Regulation (GDPR), below contact attributes are deleted:

- First Name
- Last Name
- Full Name
- Phone Number
- Fax Number
- Email
- Corrected e-mail
- Department
- Mailbox
- Priority Flag (optional) is set to “**Standard**”

PLEASE NOTE: Only user with activated permission “**IHS_CONTACT_MANAGEMENT_DELETE**” can delete the organisation unit.

23.1.3.2.3.4.4 Save

The button is active only in case the contact is being created or edited.

By click on it new or updated organisation unit is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 198**).

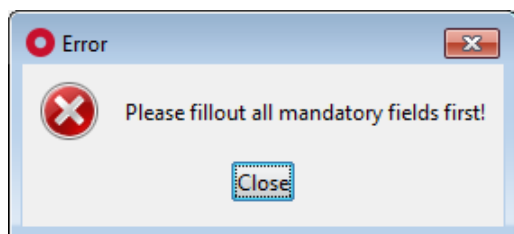


Figure 198 Error message shown on save of a contact

23.1.3.2.3.4.5 Cancel

The button is active only in case the contact is being created or edited.

By click on it creation or edit of the contact is cancelled.

23.1.3.2.3.4.6 Close

Closes the company panel.

The button is inactive in case the contact is being created or edited.

23.1.3.3 Delete

Selected IHS company(ies) can be deleted upon the selection and click on the **“Delete”** button. This will bring up a small pop-up window. By click on the **“Yes”** button the company will be deleted. By click on the **“No”** button, the company will be kept.

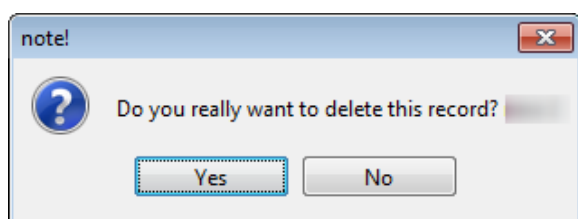


Figure 199 Confirmation of deletion of the company

The button is enabled only if company of type **“IHS Company”** is selected.

PLEASE NOTE: Only user with activated permission **“IHS_CONTACT_MANAGEMENT_DELETE”** can delete the IHS company.

23.1.3.4 Export Companies & Contacts

Wished/all companies, optionally including contact persons assigned to them, can be exported by click on the **“Export Companies & Contacts”** button.

This loads a dialog window (see **Figure 200** and **Figure 201**).

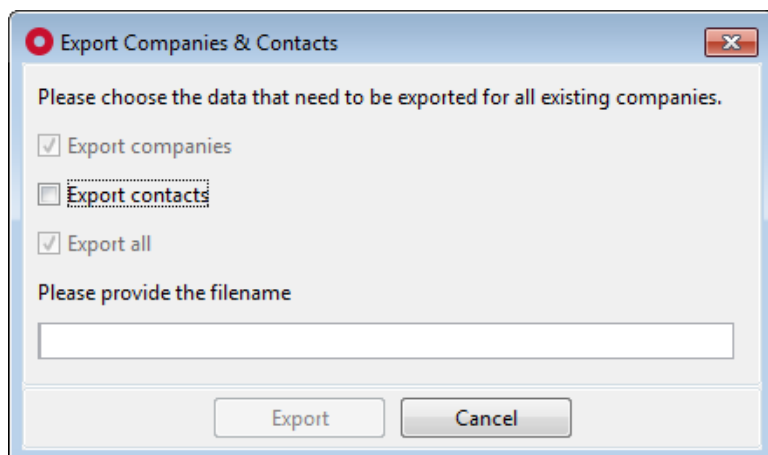


Figure 200 Export Companies & Contacts panel – search not performed

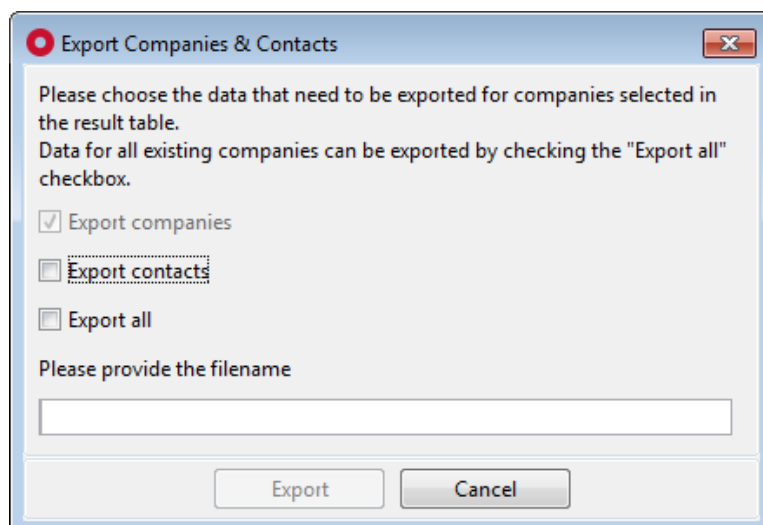


Figure 201 Export Companies & Contacts panel – search performed

The header text in the panel changes depending on whether the search was performed in the company master data panel or not.

The checkboxes in the panel defines the content of the export and are as follows:

- **Export companies**
This checkbox is disabled and checked by default.
This ensures that the company export contains the company details.
- **Export contacts**
This checkbox is enabled if the “**SUPPLIER_CONTACT_EXPORT**” permission is granted to the user.
This checkbox is unchecked by default:

- If the checkbox is checked, the export of companies is enriched with details about contacts assigned to individual companies and organisation units.
- If the checkbox is unchecked, only companies are exported.
- **Export All**
This checkbox is enabled or disabled, depending on whether the search was performed in the company master data panel or not:
 - **Search was not performed**
Checkbox is disabled and checked by default which means that company export always contains details about all companies.
 - **Search was performed**
Checkbox is enabled and unchecked by default which means that the company export contains details of only those company(ies) that is(are) selected in the result list in the company master data panel.

The name of the DB job as well as the name of the output CSV file is defined in the “**Please provide the filename**” text field.

Finally the export can be triggered by click on the “**Start**” button. This informs user that the database job was created. The ID of the job is included in the message. By click on the “**Close**” button, the export dialog is closed.

For more details about working with DB-Job Manager, please see **chapter 21**.

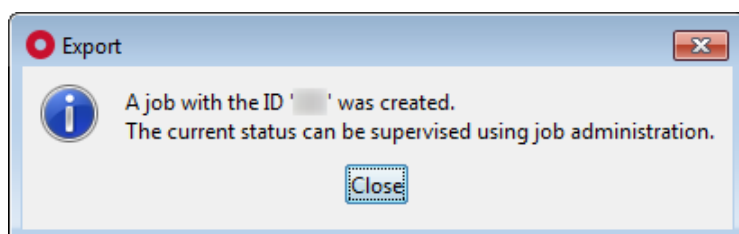


Figure 202 Notification dialog about creation of the DB job for the company & contacts export

By click on the “**Cancel**” button, the export dialog is closed without any export done.

PLEASE NOTE: Only user with activated permission “**SUPPLIER_COMPANY_EXPORT**” can export the companies.

23.1.3.4.1 Export file content

Export file is in the CSV format and contains details about companies and organisation units and optionally also about contacts assigned to the companies and organization units:

- **Company export**
Export has 18 columns:
 - Columns 1-9 contain details about companies
 - Columns 10-18 contain details about organisation units

PLEASE NOTE: Only active companies are present in the export.

- **Company & contacts export**

Export has 27 columns:

- Columns 1-9 contain details about companies
- Columns 10-18 contain details about organisation units
- Columns 19-27 contain details about contacts

PLEASE NOTE: Only active companies and contacts are present in the export.

No.	Column Name	Comment
1	Company Name	The company details are repeated in the export file as many times as many organisation units exists for the company as well as many contacts are assigned to the company.
2	Company ID	
3	Company DUNS Number	
4	Company Supplier Code	
5	Company Street	
6	Company ZIP Code	
7	Company City	
8	Company Mailbox	
9	Company Country Code	
10	Org. Unit Name	The organisation unit details are repeated in the export file as many times as many contacts are assigned to the organization unit. If no organisation unit exists for the company, these columns will be empty.
11	Org. Unit ID	
12	Org. Unit DUNS Number	
13	Org. Unit Supplier Code	
14	Org. Unit Street	
15	Org. Unit ZIP Code	
16	Org. Unit. City	
17	Org. Unit Mailbox	
18	Org. Unit Country Code	
19	Contact First Name	These columns are present only if the export of contacts is also included in the company export. If the contact is not defined for the company and/or organisation unit, these columns will be empty.
20	Contact Last Name	
21	Contact Email Address	
22	Contact Phone Number	
23	Contact Department	
24	Contact Fax Number	
25	Contact Type	
26	Contact Corrected Email	
27	Contact Priority Flag	

Table 4 Content of companies & contacts export file

23.2 Geography (optional)

To manage the companies / legal units / contacts, panel for management needs be opened by navigation to the menu “**Extras → Master data → Companies / legal units / contacts**”.

PLEASE NOTE: Only user with activated permission “**ADMIN_GEO_ORG_DATA**” can access geography master data panels.

23.2.1 Countries (optional)

To manage the countries, panel for management needs be opened by navigation to the menu “**Extras → Master data → Geography → Countries**”.

The panel for management of countries is split into three areas:

1. Search mask (orange) – see **chapter 23.2.1.1**
2. Result list (blue) – see **chapter 23.2.1.2**
3. Actions (green) - see **chapter 23.2.1.3**

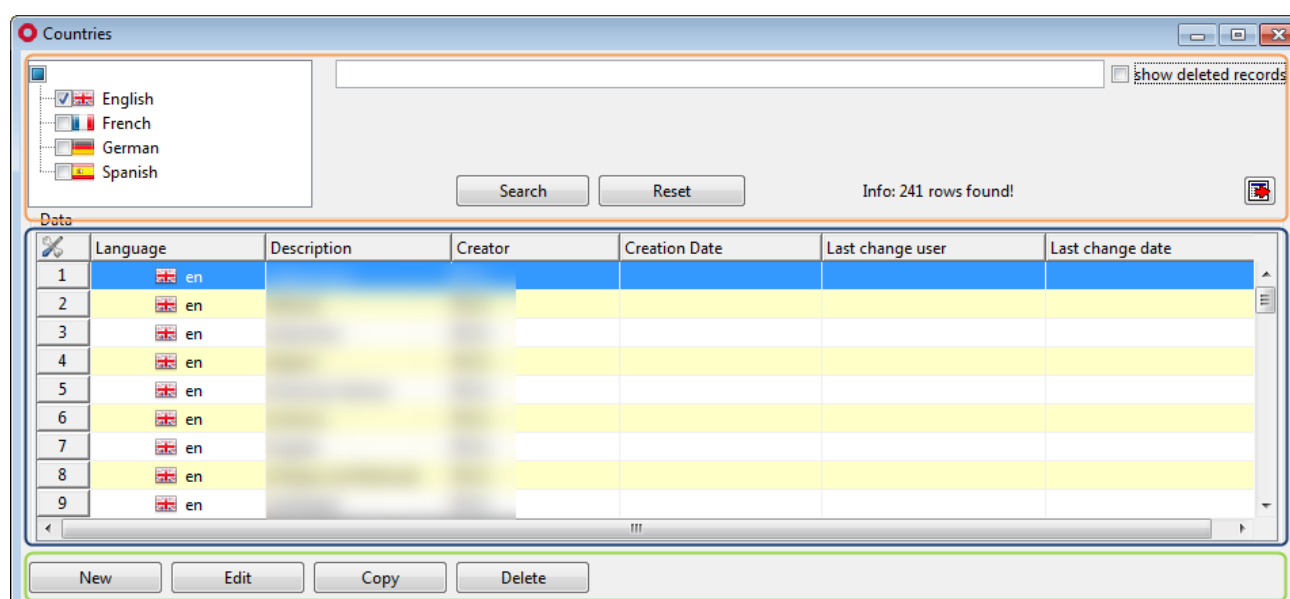


Figure 203 Countries master data panel

23.2.1.1 Search mask

Enables to search for countries based on defined search criteria.

The following search criteria are available:

- **Language**
Limits search to only selected language(s).
By default, the checkbox for the language in which the iPCA client is started, is checked (if records in given language exists).

- **Name/ID**
Name or ID of the country.
- **Show deleted records**
If this checkbox is checked, only deleted records will be displayed.

23.2.1.2 Result list

The result list displays countries as per defined search criteria. Each row represents one country.

The following standard columns are available:

- **Language**
Language in which the description is set.
- **Description**
Name of the country.
- **Creator**
Name of the user who created the country (using iPCA full name).
Name of the user of a country created by a system (e.g. by import) is “**IPCA**”.
- **Creation Date**
The date of the creation of the country.
- **Last change user**
Name of the user who last time updated the country (using iPCA full name).
Name of the user of a country updated by a system is “**IPCA**”.
- **Last change date**
The date when the country was last time updated.

23.2.1.3 Actions

The following actions are available:

- **New**
Allows to create new country (see **chapter 23.2.1.3.1**).
- **Edit**
Allows to edit / display the details of the selected record (see **chapter 23.2.1.3.2**).
- **Copy**
Allows to copy selected record (see **chapter 23.2.1.3.3**).
- **Delete/Restore**
Allows to delete or restore selected record (see **chapter 23.2.1.3.4**).

23.2.1.3.1 New

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

This open the new panel allowing definition of the country in wished languages.

Following information must be defined:

- **ID**
ID of the country.
This is mandatory field.
- **Name**
Name of the country (in selected language).
This is mandatory field.

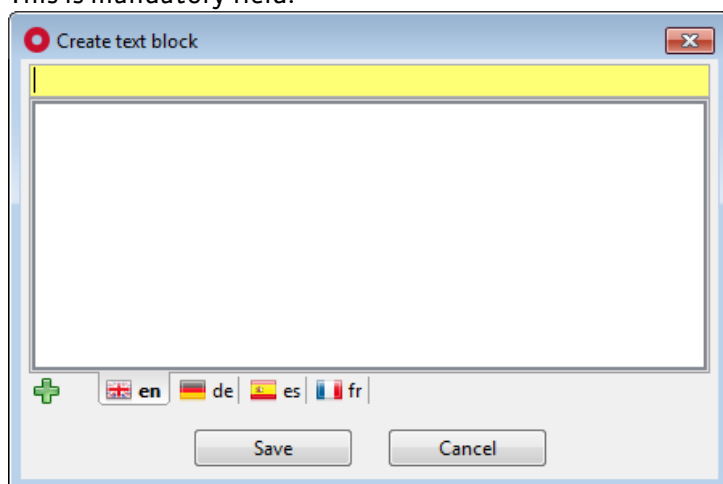


Figure 204 Panel for creation of country

PLEASE NOTE: If needed, new language can be added to the record by click on the **“+”** button and selection of the wished language.

Once all the details are defined, new country be can be saved by click on the **“Save”** button. Creation of new country can be cancelled by click the **“Cancel”** button.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown.

23.2.1.3.2 Edit

The details of the selected country can be modified by click on the **“Edit”** button. This load a country panel populated with details of a selected country and they can be changed.

23.2.1.3.3 Copy

New country can be created by copy of the selected country by click on the **“Copy”** button. This load a country panel populated with details of a selected country.

Creation of a new country by copy can be confirmed using **“Save”** button. To cancel copy process, the **“Cancel”** button is used.

23.2.1.3.4 Delete / Restore

Label and function of this button is interactive:

- If the selected record is active, the label of this button is **“Delete”**
- If the selected record is deleted, the label of this button is **“Restore”**

Upon selection of the active record and click on the button **“Delete”**, the dialog panel is shown asking user if the record should be marked as deleted which can be confirmed by click on the **“Yes”** button. By click on the **“No”** button, record will remain active.

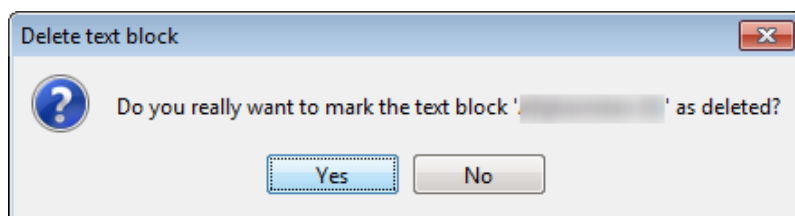


Figure 205 Dialog shown prior deletion of country

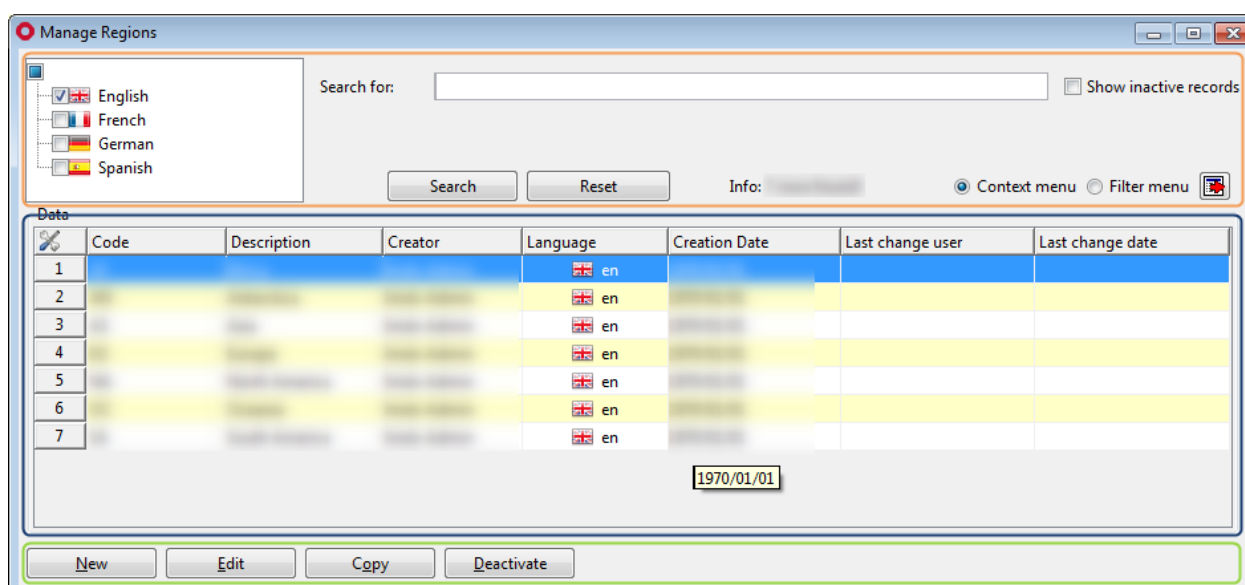
Upon selection of the deleted record and click on the button **“Restore”**, record is automatically activated.

23.2.2 Regions (optional)

To manage the regions, panel for management needs be opened by navigation to the menu “**Extras → Master data → Geography → Regions**”.

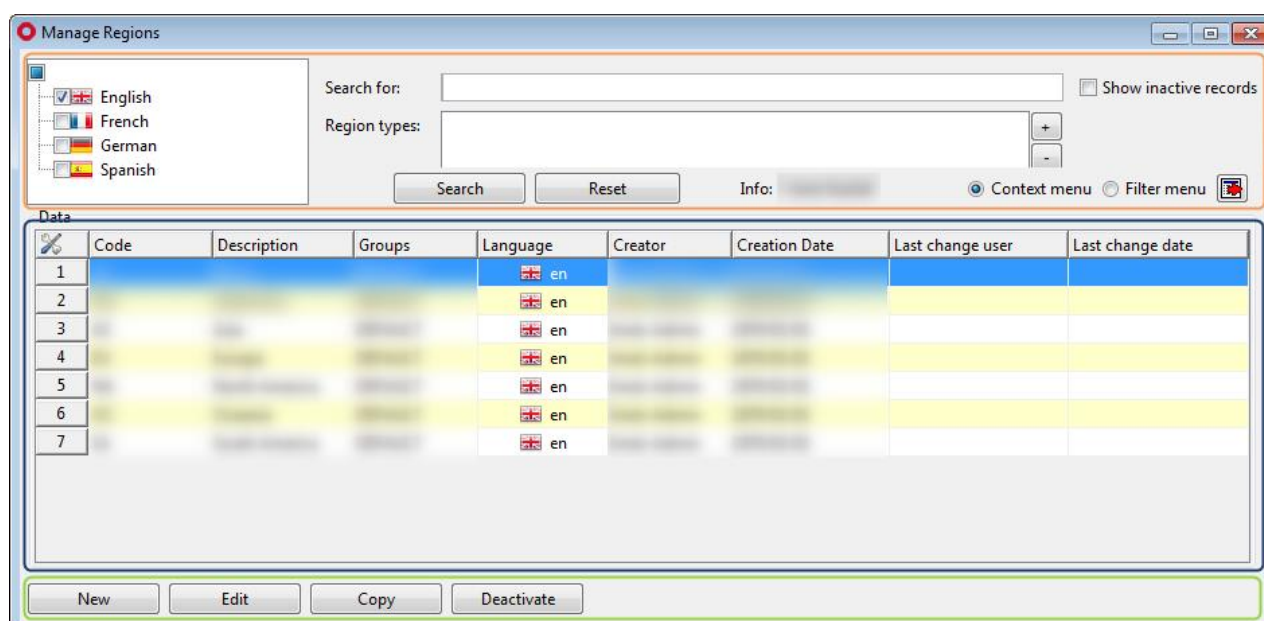
The panel for management of the regions is split into three areas:

1. Search mask (orange) – see **chapter 23.2.2.1**
2. Result list (blue) – see **chapter 23.2.2.2**
3. Actions (green) - see **chapter 23.2.2.3**



The screenshot shows the 'Manage Regions' window. It has a search mask at the top with a language selection list (English, French, German, Spanish), a search input field, and buttons for 'Search' and 'Reset'. Below the search mask is a table with columns: Code, Description, Creator, Language, Creation Date, Last change user, and Last change date. The table contains 7 rows of data. At the bottom of the window are buttons for 'New', 'Edit', 'Copy', and 'Deactivate'.

Figure 206 Regions master data panel



The screenshot shows the 'Manage Regions' window with an additional 'Region types' field in the search mask. The table now includes a 'Groups' column. The table contains 7 rows of data. At the bottom of the window are buttons for 'New', 'Edit', 'Copy', and 'Deactivate'.

Figure 207 Regions master data panel extended with support of region type

23.2.2.1 Search mask

Enables to search for regions based on defined search criteria.

The following search criteria are available:

- **Language**
Limits search to only selected language(s).
By default, the checkbox for the language in which the iPCA client is started, is checked (if records in given language exists).
- **Search for**
Name or ID of the region.
- **Region types**
Region types defined in “**Region Types**” master data panel (see **chapter 23.2.4**) and potentially assigned to the regions.
This search criterion is displayed only if the region types module is licensed.
- **Show inactive records**
If this checkbox is checked, only inactive records will be displayed.

23.2.2.2 Result list

The result list displays regions as per defined search criteria. Each row represents one region.

The following standard columns are available:

- **Code**
Code of the region.
- **Description**
Name of the region.
- **Groups**
Region types assigned to the region.
In case the assigned region type got deactivated, it is displayed as strikethrough.
This column is displayed only if the region types module is licensed.
- **Language**
Language in which the description is set.
- **Creator**
Name of the user who created the region (using iPCA full name).
Name of the user of a region created by a system (e.g. by import) is “**IPCA**”.
- **Creation Date**
The date of the region of the region.

- **Last change user**
Name of the user who last time updated the region (using iPCA full name).
Name of the user of a region updated by a system is “**IPCA**”.
- **Last change date**
The date when the region was last time updated.

23.2.2.3 Actions

The following actions are available:

- **New**
Allows to create new region (see **chapter 23.2.2.3.123.2.1.3.1**).
- **Edit / View**
Allows to edit / display the details of the selected record (see **chapter 23.2.2.3.2**).
- **Copy**
Allows to copy selected record (see **chapter 23.2.2.3.3**).
- **Deactivate/Activate**
Allows to deactivate or activated selected record (see **chapter 23.2.2.3.4**).

23.2.2.3.1 New

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

This open the new panel allowing definition of the region in wished languages.

Following information must be defined:

- **Region Type**
This attribute is displayed only if the region types module is licensed.
Only active region types can be selected.
This is mandatory field.
- **ID**
ID of the region.
This is mandatory field.
- **Name**
Name of the region (in selected language).
This is mandatory field.

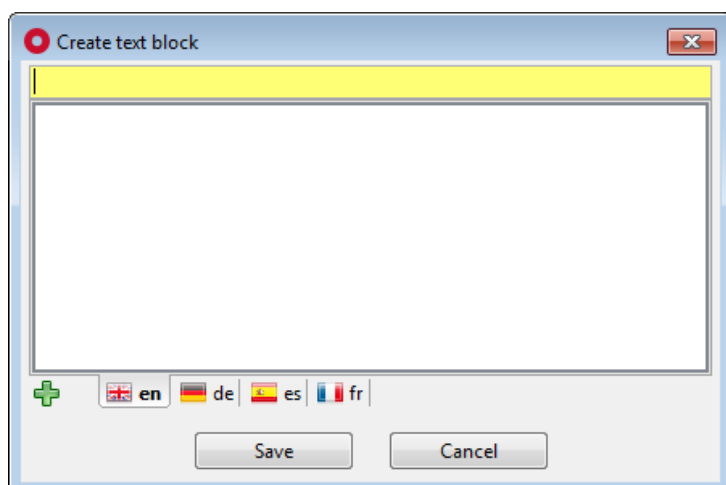


Figure 208 Panel for creation of region

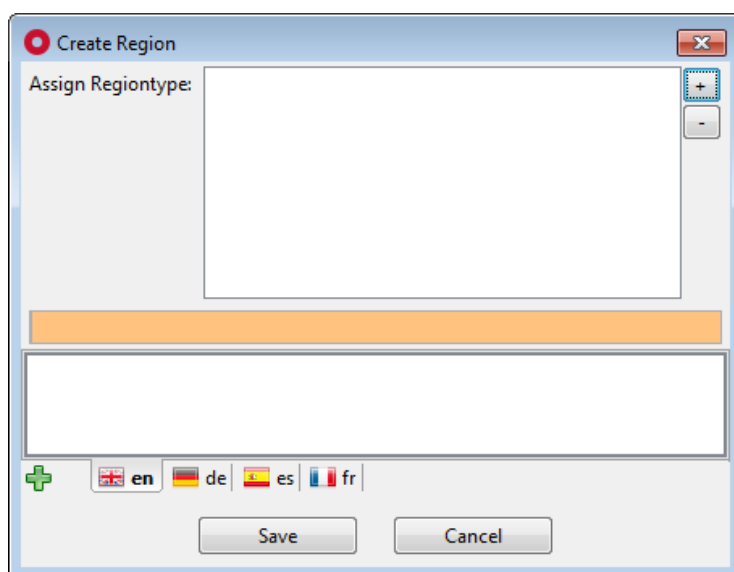


Figure 209 Panel for creation of region extended with support of region type

If needed, new language can be added to the record by click on the “+” button and selection of the wished language.

Once all the details are defined, new region be can be saved by click on the “**Save**” button. Creation of new region can be cancelled by click the “**Cancel**” button.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown.

PLEASE NOTE: Only user with activated permission “**REGION_VIEW_EDIT**” can create new region.

23.2.2.3.2 Edit / View

Label and function of this button is interactive:

- If the permission “**REGION_VIEW**” is granted to the user, the label of this button is “**View**”
- If the permission “**REGION_VIEW_EDIT**” is granted to the user, the label of this button is “**Edit**”

The details of the selected region can be displayed by click on the “**View**” button or modified by click on the “**Edit**” button. This load a region panel populated with details of a selected region and they can be changed.

23.2.2.3.3 Copy

New region can be created by copy of the selected region by click on the “**Copy**” button. This load a region panel populated with details of a selected region.

Creation of a new region by copy can be confirmed using “**Save**” button. To cancel copy process, the “**Cancel**” button is used.

PLEASE NOTE: Only user with activated permission “**REGION_VIEW_EDIT**” can create new region by copy.

23.2.2.3.4 Deactivate / Activate

Label and function of this button is interactive:

- If the selected record is active, the label of this button is “**Deactivate**”
- If the selected record is deactivated, the label of this button is “**Activate**”

Upon selection of the active record and click on the button “**Deactivate**”, the dialog panel is shown asking user if the record should be marked as inactive which can be confirmed by click on the “**Yes**” button. By click on the “**No**” button, record will remain active.

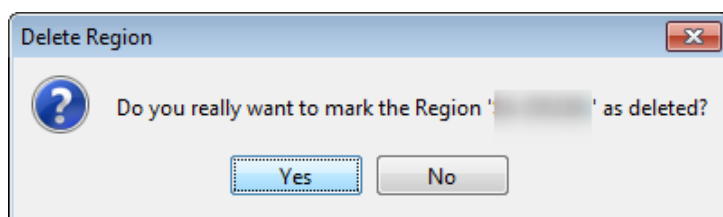


Figure 210 Dialog shown prior deletion of region

Upon selection of the inactive record and click on the button “**Activate**”, record is automatically activated.

23.2.3 Country Assignment (optional)

To manage the assignment of countries to regions/organisations, panel for management needs be opened by navigation to the menu “**Extras → Master data → Geography → Country Assignment**”.

The panel for management of the country assignment is split into four areas:

1. Search mask (orange) – see **chapter 23.2.3.1**
2. Result list (blue) – see **chapter 23.2.3.2**
3. List of countries assigned to the region / organisation (green) – see **chapter 23.2.3.3**
4. Actions (black) - see **chapter 23.2.3.4**

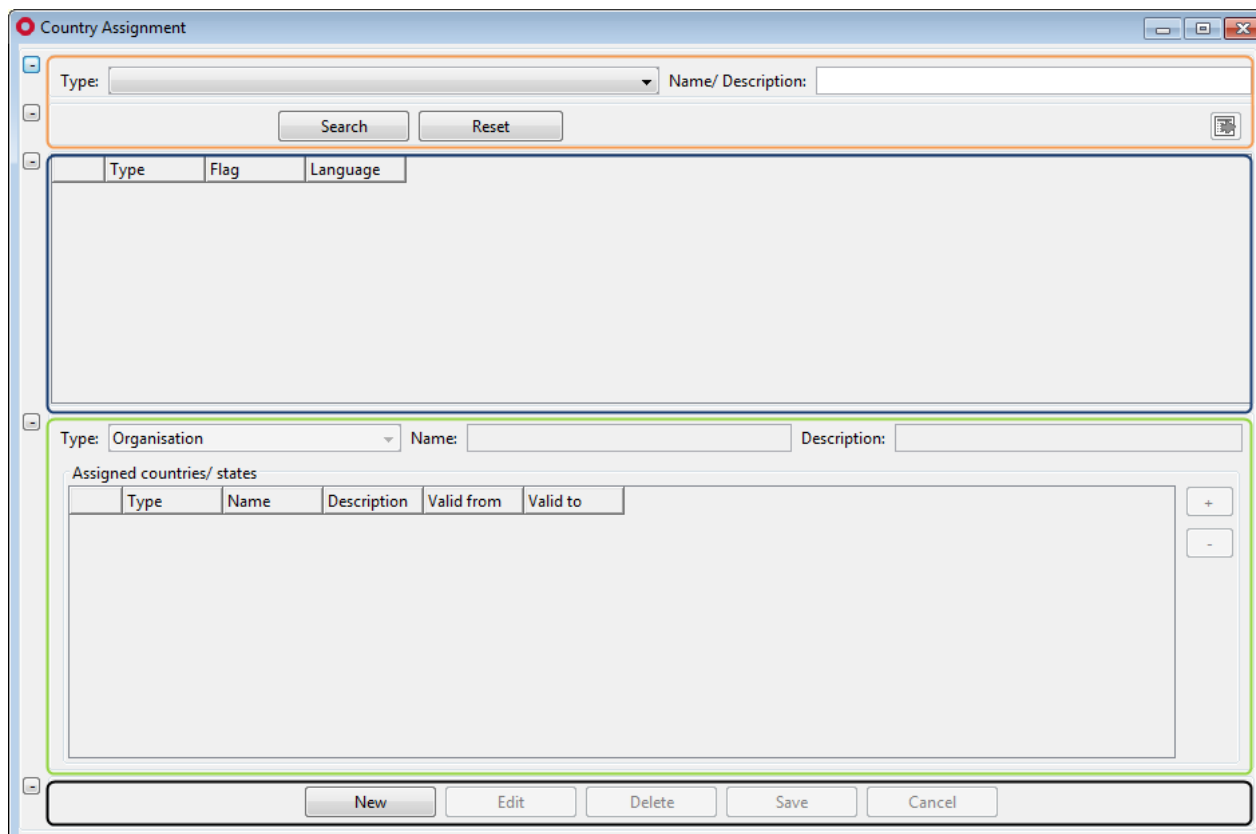


Figure 211 Country Assignment master data panel

23.2.3.1 Search mask

Enables to search for regions / organisations based on defined search criteria.

The following search criteria are available:

- **Type**
Type of the grouping element:
 - Organisation
 - Region

- **Name/Description**
Name or description of the region / organisation.

23.2.3.2 Result list

The result list displays regions / organisations as per defined search criteria. Each row represents one region / organisation.

The following standard columns are available:

- **Type**
Type of the record:
 - Organisation
 - Region
- **Flag**
Flag of the region / organisation.
- **Language**
Language of the region / organisation.

23.2.3.3 List of countries assigned to the region / organisation

The result list displays list of countries assigned to region / organisation selected in the above result list.

The following standard columns are available:

- **Type**
Type of the record.
- **Name**
Name of the record.
- **Description**
Description of the record.
- **Valid from**
Date from when the record is valid.
- **Valid to**
Date until the record is valid.

23.2.3.4 Actions

The following actions are available:

- **New**
Allows to create new record.
- **Edit**
Allows to edit / display the details of the selected record.
- **Save**
Allows to save new or updated record.
- **Cancel**
Allows to cancel creation or edit of record.

23.2.4 Region Types (optional)

To manage the region types, panel for management needs be opened by navigation to the menu “**Extras** → **Master data** → **Geography** → **Countries**”.

PLEASE NOTE: Only user with activated permission “**REGION_TYPES_VIEW**” (only in read only mode) and/or with activated permission “**REGION_TYPES_VIEW_EDIT**” (in write access) can access region types master data panels.

The panel for management of the region types is split into three areas:

1. Search mask (orange) – see **chapter 23.2.4.1**
2. Result list (blue) – see **chapter 23.2.4.2**
3. Actions (green) - see **chapter 23.2.4.3**

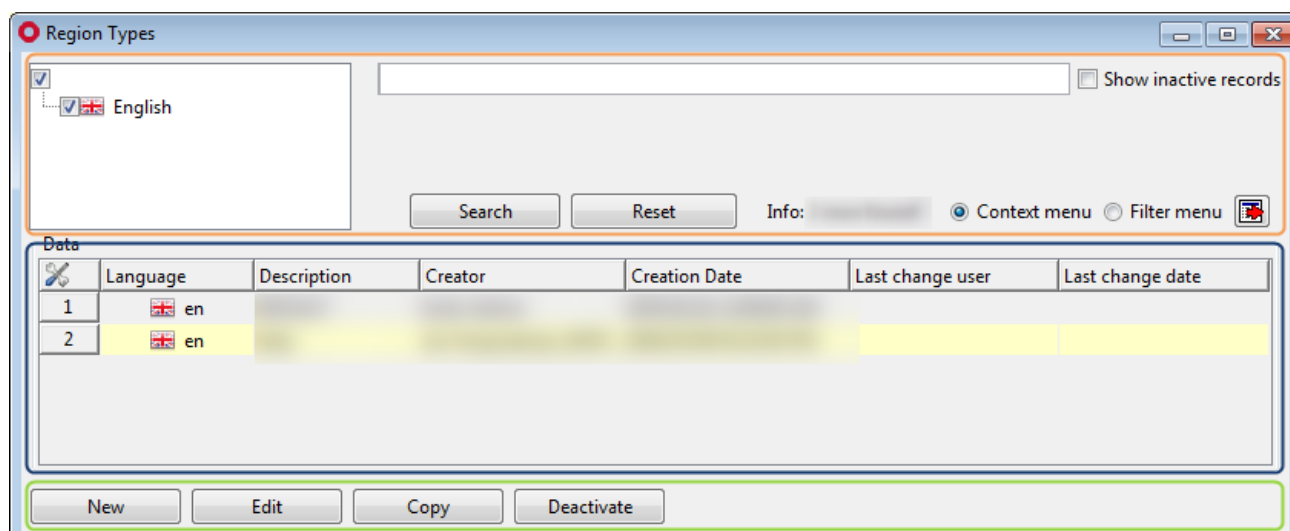


Figure 212 Region Types master data panel

23.2.4.1 Search mask

Enables to search for region types based on defined search criteria.

The following search criteria are available:

- **Language**
Limits search to only selected language(s).
By default, the checkbox for the language in which the iPCA client is started, is checked (if records in given language exists).
- **Name/ID**
Name or ID of the region type.
- **Show inactive records**
If this checkbox is checked, only inactive records will be displayed.

23.2.4.2 Result list

The result list displays region types as per defined search criteria. Each row represents one region type.

The following standard columns are available:

- **Name**
Name of the region type.
- **Language**
Language in which the description is set.
- **Creator**
Name of the user who created the region type (using iPCA full name).
Name of the user of a region type created by a system (e.g. by import) is “**IPCA**”.
- **Creation Date**
The date of the creation of the region type.
- **Last change user**
Name of the user who last time updated the region type (using iPCA full name).
Name of the user of a region type updated by a system is “**IPCA**”.
- **Last change date**
The date when the region type was last time updated.

23.2.4.3 Actions

The following actions are available:

- **New**
Allows to create new region type (see **chapter 23.2.4.3.1**).

- **Edit / View**
Allows to edit / display the details of the selected record (see **chapter 23.2.4.3.2**).
- **Copy**
Allows to copy selected record (see **chapter 23.2.4.3.3**).
- **Deactivate / Activate**
Allows to deactivate or reactivate selected record (see **chapter 23.2.4.3.4**).
- **Cancel**
Closes the master data panel.
This button is displayed in case the user has granted only the permission “**REGION_TYPES_VIEW**”.

23.2.4.3.1 New

New region type can be created by click on the “**New**” button.

This open the new panel allowing definition of the region type in wished languages.

Following information must be defined:

- **ID**
ID of the region type.
This is mandatory field.
- **Name**
Name of the region type (in selected language).
This is mandatory field.

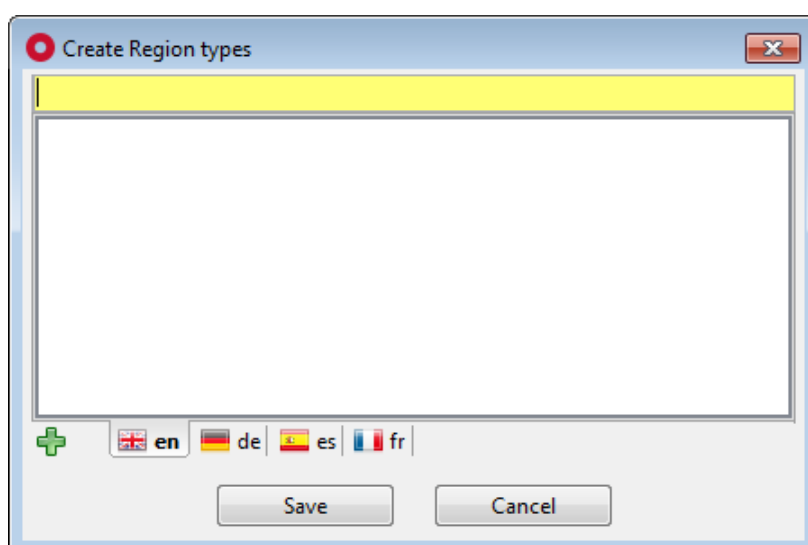


Figure 213 Panel for creation of region type

PLEASE NOTE: If needed, new language can be added to the record by click on the “+” button and selection of the wished language.

Once all the details are defined, new region type can be saved by click on the “**Save**” button. Creation of new region type can be cancelled by click the “**Cancel**” button.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown.

PLEASE NOTE: Only user with granted permission “**REGION_TYPES_VIEW_EDIT**” can create new region type.

23.2.4.3.2 Edit / View

Label and function of this button is interactive:

- If the permission **REGION_TYPES_VIEW** is granted to the user, the label of this button is “**View**”
- If the permission “**REGION_TYPES_VIEW_EDIT**” is granted to the user, the label of this button is “**Edit**”

The details of the selected region type can be displayed by click on the “**View**” button or modified by click on the “**Edit**” button. This load a region type panel populated with details of a selected region type and they can be changed.

23.2.4.3.3 Copy

New region type can be created by copy of the selected region type by click on the “**Copy**” button. This load a region type panel populated with details of a selected region type.

Creation of a new region type by copy can be confirmed using “**Save**” button. To cancel copy process, the “**Cancel**” button is used.

PLEASE NOTE: Only user with granted permission “**REGION_TYPES_VIEW_EDIT**” can create new region type by copy.

23.2.4.3.4 Deactivate / Activate

Label and function of this button is interactive:

- If the selected record is active, the label of this button is “**Deactivate**”
- If the selected record is inactive, the label of this button is “**Activate**”

Upon selection of the active record and click on the button “**Deactivate**”, the dialog panel is shown asking user if the record should be marked as inactive which can be confirmed by click on the “**Yes**” button. By click on the “**No**” button, record will remain active.

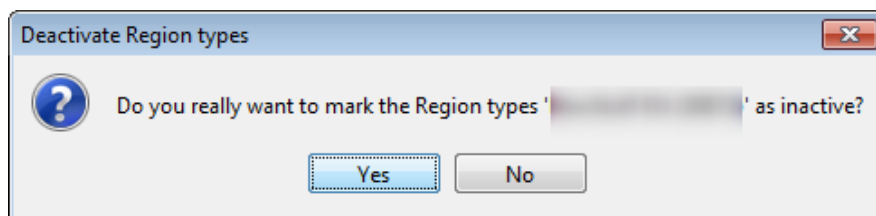


Figure 214 Dialog shown prior deactivation of the region type

Upon selection of the inactive record and click on the button “**Activate**”, record is automatically activated.

PLEASE NOTE: Only user with granted permission “**REGION_TYPES_VIEW_EDIT**” can deactivate or activate region type.

23.3 Substance Group Types

Substance group types are used to define logical groups for substance groups, which belong together.

The management for substance group types, is like the master data management section (see **chapter** Error! Reference source not found.)

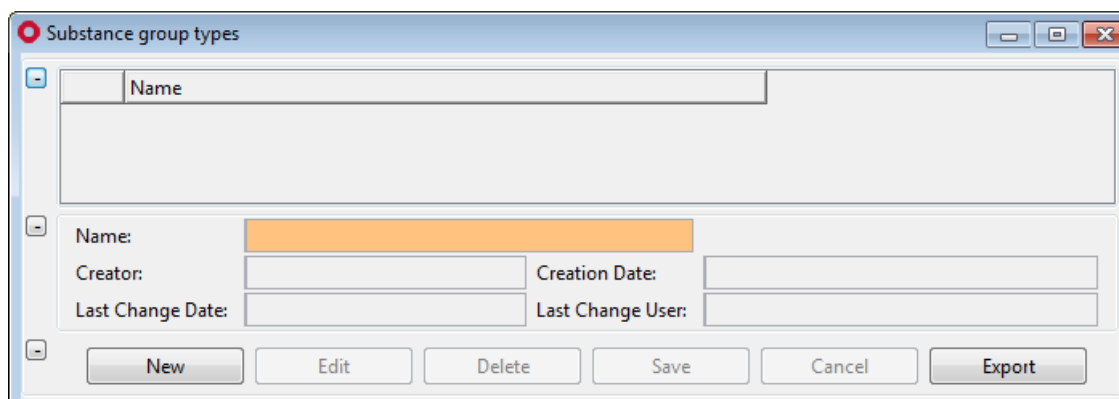


Figure 215 Substance group type master data panel

23.4 Substance Groups

Substance groups are used to define logical groups for substances, that belong together. Those substance groups that are available in IMDS (substance group type is IMDS) can only be viewed or copied but cannot be edited.

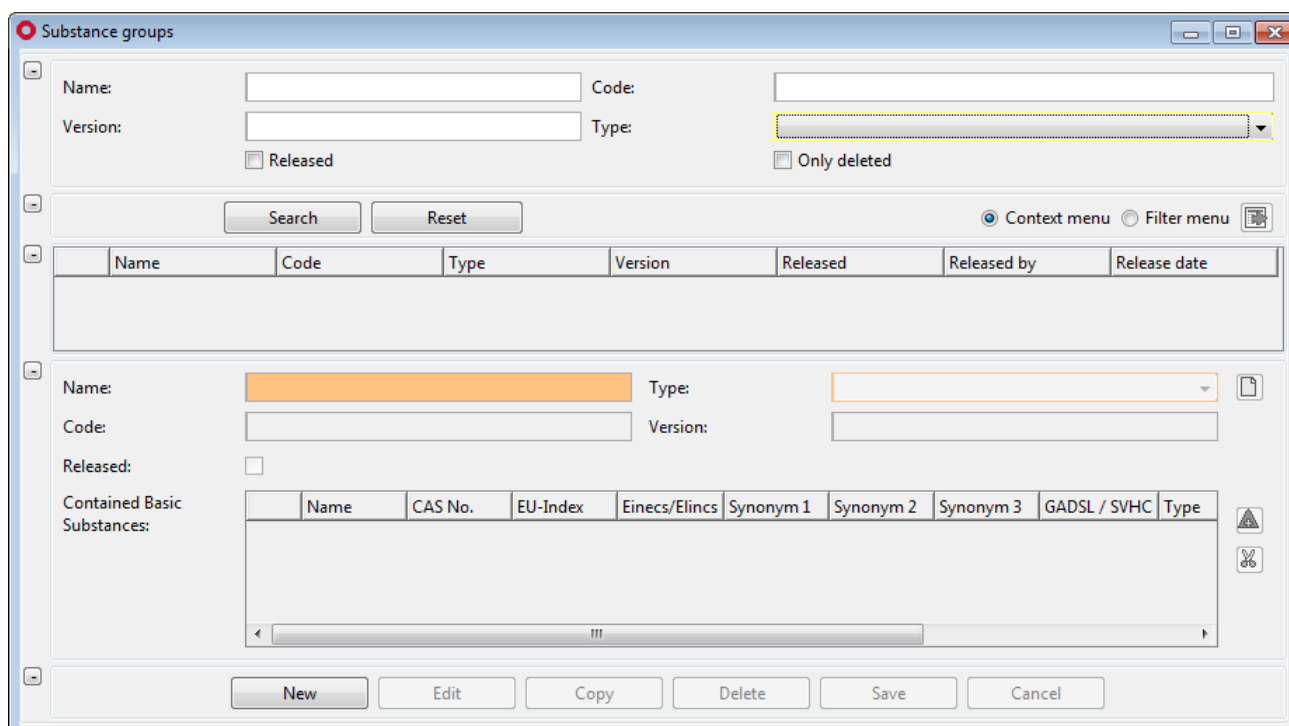


Figure 216 Management of substance groups

The panel is divided into four areas:

- List of existing substance groups (marked in red)
- Details for the selected substance group, editable during creation/change of a substance group (marked in green)
- List of basic substances which are assigned to the selected substance group (marked in blue)
- Actions (marked in orange)
 - **New**
Creation of a new substance group
 - **Edit**
Edit a selected substance group (System released groups cannot be edited)
 - **New version**
If your own substance group is released, it cannot be edited further. To make changes, a new version of this substance group must be created. To do this, the user must select the substance group, then select “New version” and will be asked if the existing, assigned basic substances will be applied to the new group or not.
 - **Copy**
Duplicate of an existing substance group with the assigned basic substances.
 - **Delete**
Delete the selected substance group

- **Save**
Save the data (while changing or creating a new substance group)
- **Cancel**
Cancel without saving the data (while changing or creating a new substance group)
- **Export**
Standard functionality: Export the result list

A substance group contains the following information:

- **Name**
A name for the substance group
- **Code**
A code for the substance group (optional)
- **Type**
The substance group type, that the substance group belongs to
- **List of contained substances**
Adding substances to the group, is actioned with the standard search for basic substances – the search can be opened by selecting the icon (🔍) on the right, in the blue area.
To delete a substance from the group, the substance has to be selected, and can then be deleted by selecting the icon (✖) on the right, in the blue area.
Attention:
The group must contain at least one substance, otherwise it cannot be saved.

23.5 Regions and Organisations (Optional)

The general management for regions and organisations is described in chapter 23.1 “General”

Regions are used to define geographical based, logical groups of countries. Organisation are used for the same, with the different that the grouping is based on an economic, legal or political form.

Here are two examples:

- Region: Europe – all countries that geographically belongs to Europe
- Organisation: European Union – all countries which belong to this confederation

Based on the fact that there are continual changes within an organisation, there is a possibility to define a valid from, and until date, for a countries assignment.

Regions and organisations master data, is used for example, within some reports and analysis.

Hint: There are some initial regions and organisation in the system, created by iPoint . Every user of the system is responsible for the validity and actuality of the data by itself.

23.6 CSI Due Dates

To manage the CSI due dates, panel for management needs be opened by navigation to the menu “**Extras** → **Master data** → **CSI Due Dates**”.

The panel for management of the CSI due dates is split into four areas:

1. Search mask (orange) – see **chapter 23.6.1**
2. Result list (blue) – see **chapter 23.6.2**
3. CSI due date details (green) - see **chapter 23.6.3**
4. Actions (black) - see **chapter 23.6.4**

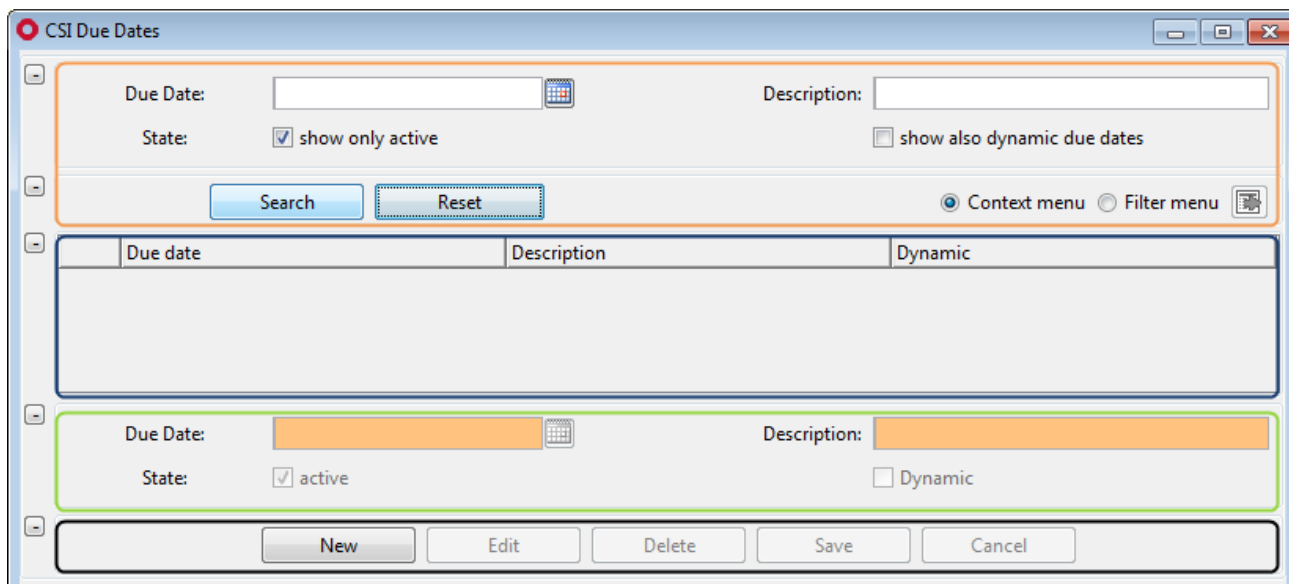


Figure 217 CSI Due Dates master data panel

23.6.1 Search mask

Enables to search for CSI due dates based on defined search criteria.

The following search criteria are available:

- **Due Date**
Date of the CSI due date.
- **State**
This checkbox is checked by default:
 - If the checkbox is checked, the search considers only active CSI due dates and the checkbox “**show also dynamic due dates**” is automatically unchecked and disabled.
 - If the checkbox is unchecked, the search considers all CSI due dates.
- **Description**
Description of the CSI due date.

- **Show also dynamic due dates**

This checkbox is unchecked by default:

- If the checkbox is checked, the search considers also dynamically created CSI due dates.
- If the checkbox is unchecked, the search considers only manually created CSI due dates.

23.6.2 Result list

The result list displays CSI due dates as per defined search criteria. Each row represents one CSI due date.

The following standard columns are available:

- **Due date**
Date of the CSI due date.
- **Description**
Description of the CSI due date.
- **Dynamic**
Information about the origin of the CSI due date:
 - Yes
The CSI due date is dynamically created.
 - No
The CSI due date is manually created.

23.6.3 CSI due date details

Display the details of the selected CSI due date or allow definition of a new CSI due date.

23.6.4 Actions

The following actions are available:

- **New**
Empties and activates fields in the CSI due date details area and new details of the new CSI due date can be defined (see **chapter 23.6.4.1**).
- **Edit**
Activates fields in the CSI due date details and the details can be modified (see **chapter 23.6.4.2**).
- **Delete**
Deletes selected CSI due date (see **chapter 23.6.4.3**).
- **Save**
Saves the new the CSI due date or changes in the CSI due date (see **chapter 23.6.4.4**).

- **Cancel**
Cancel the creation or edit of the CSI due date (see **chapter 23.6.4.5**).

23.6.4.1 New

New CSI due date can be created by click on the “**New**” button.

This activates the details of CSI due date.

Following information must/could be defined:

- **Due Date**
Unique date of the CSI due date.
This can be defined either manually or using  button and selecting the date from the calendar shown.
This field is mandatory.
- **State**
Checkbox defining whether the CSI due date is active or not.
This checkbox is checked by default.
- **Description**
Description of the CSI due date.
This field is mandatory.

Once all the details are defined, CSI due date can be saved by click on the “**Save**” button. To cancel creation of new CSI due date, click the “**Cancel**” button.

23.6.4.2 Edit

Below details of selected CSI due date can be modified by click on the “**Edit**” button:

- **State**
Checkbox defining whether the CSI due date is active or not.
This checkbox is checked by default.
- **Description**
Description of the CSI due date.
This field is mandatory.

Once changes are done, CSI due date can be saved by click on the “**Save**” button. To cancel changes, click the “**Cancel**” button.

PLEASE NOTE: In case the dynamically created CSI due date is selected in the result list, the “**Edit**” button is deactivated.

23.6.4.3 Delete

Selected CSI due date can be deleted by click on the “**Delete**” button.

Upon click on the button, below dialog is displayed informing user that the deletion of the CSI due date causes also deletion of all associated analysis results and asking him if this should be really done.

By click on the “**Yes**” button a CSI due date request will be deleted. By click on the “**No**” button, the CSI due date will be kept.

PLEASE NOTE: The deletion of the CSI due date with lot of associated analysis results may take a while.

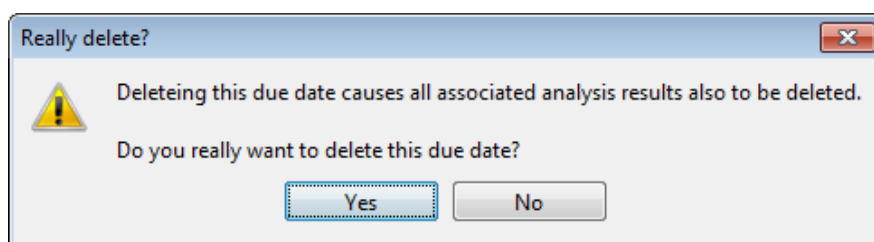


Figure 218 Dialog shown prior the deletion of a CSI due date

23.6.4.4 Save

The button is active only in case the CSI due date is being created or edited.

By click on it new or updated CSI due date is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see Figure 219). In case the date entered in the “**Due Date**” field is not unique, another error message is shown (see **Figure 220**).

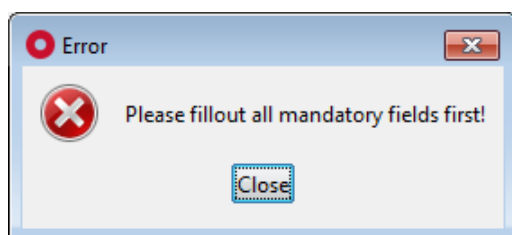


Figure 219 Error message shown on save of a CSI due date

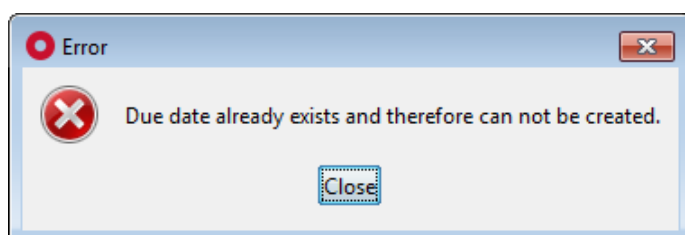


Figure 220 Error message shown in case the entered due date is not unique



iPoint

iPCA

IHS

V14.00 onwards

23.6.4.5 Cancel

The button is active only in case the CSI due date is being created or edited.

By click on it creation or edit of the CSI due date is cancelled.

24 Event Management (Optional)

24.1 Overview

Event management allows users to subscribe to specific event to be notified via email about a event as soon as this event happens. Moreover, event manager administrator can manage notifications for some events on a company level as well as to subscribe individual users to wished events.

To manage the subscription to events, panel for management needs be opened by navigation to the menu “**Extras** → **Event-Manager**”.

PLEASE NOTE: Only user with activated permission “**ADMIN_EVENT**” or “**EVENT**” or can access Event Manager panel.

The Event Manager panels consists of tabs:

- Data (see **chapter 24.2**)
- Parameter (see **chapter 24.3**)

24.2 Data

The panel for management of the event subscriptions is split into four areas:

1. Search mask (orange) – see **chapter 24.2.1**
2. Result list (blue) – see **chapter 24.2.2**
3. Event subscription details (green) - see **chapter 24.2.3**
4. Actions (black) – see **chapter 24.2.4**

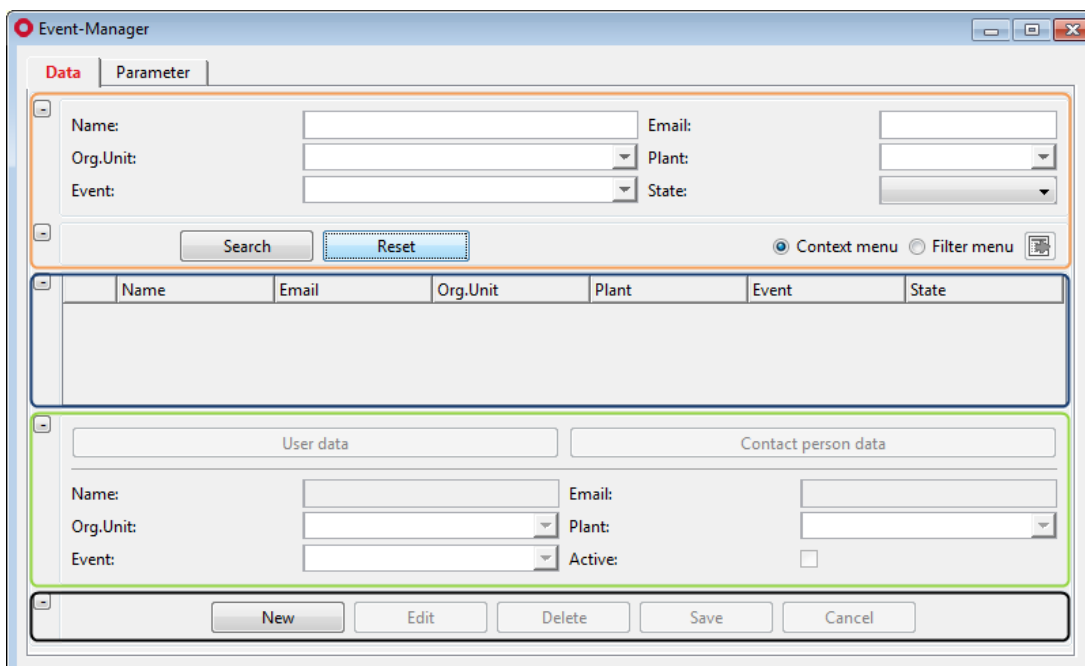


Figure 221 Event Manager – “Data” tab

24.2.1 Search mask

Enables to search for event subscriptions based on defined search criteria.

The following search criteria are available:

- **Name**
Name of the iPCA user for which the event subscription is registered (using iPCA full name).
- **Org.Unit**
Organization unit for which the event subscription is registered.
Allows to search for event subscriptions created for one of existing organization units of own company.
- **Event**
Event for which the subscription is registered.
Allows to search for subscriptions created for one of the existing events.
The list of events depends on licensed modules (for more details see **chapter 24.4**).
- **Email**
Email of the user for which the event subscription is registered.
- **Plant**
Plant in the iPCA for which the event subscription is registered.
Allows to search for event subscriptions created for one of the existing iPCA plants.
- **State**
Status of the event subscription:
 - inactive
 - active

24.2.2 Result list

The result list displays event subscriptions as per defined search criteria. Each row represents one event subscriptions.

The following standard columns are available:

- **Name**
Name of the user/person for whom the event subscription is registered (using iPCA full name).
- **Email**
Email of the user/person for which the event subscription is registered.
- **Org.Unit**
Organization unit for which the event subscription is registered.
- **Plant**
Plant in the iPCA for which the event subscription is registered.

- **Event**
Event for which the subscription is registered.
- **State**
Status of the event subscription:
 - inactive
 - active

24.2.3 Event subscription details

Display the details of the selected event subscription or allow definition of a new event subscription.

24.2.4 Actions

The following actions are available:

- **New**
Empties and activates fields in the details of event subscription area and wished event subscription can be defined (see **chapter 24.2.4.1**).
- **Edit**
Enables modification of the selected event subscription (see **chapter 24.2.4.2**).
- **Delete**
Deletes selected event subscription (see **chapter 24.2.4.3**).
- **Save**
Saves the new or updated event subscription (see **chapter 24.2.4.4**).
- **Cancel**
Cancels the creation or edit of the event subscription (see **chapter 24.2.4.5**).

24.2.4.1 New

New event subscription can be created by click on the “**New**” button.

This activates the details of event subscription.

Following information must be defined:

- **Name**
Name of the user/person for whom the event subscription is created.
This field is mandatory.
- **Org.Unit**
Own organization unit for which the subscription is created.

User with activated permission “**ADMIN_EVENT**” (and/or “**MDB_ADMIN**”) can select all available organization units of his own company. User with activated permission “**EVENT**” can assign only his own organization unit, and the parent company.

This field is mandatory in case the SEP event is selected in the “**Event**” drop-down list.

- **Event**

Event for which the subscription is created.

The list of events depends on licensed modules (for more details see **chapter 24.4**).

- **Email**

Email of the user/person for which the event subscription is created.

This field is mandatory.

- **Plant**

Plant in the iPCA for which the event subscription is created.

In case the plant is selected, then the user/person will receive the notification only in case that the selected plant is related to selected event, or in case that no plant is associated.

This field is mandatory in case the SEP event is selected in the “**Event**” drop-down list.

- **Active**

Definition if the event subscription is active or inactive.

By default, the checkbox “**Active**” is checked.

Creation of new event subscription can be created faster by using below button:

- **User Data**

Allows to search and select wished iPCA user account.

Upon confirmation, below attributes in the event subscription can be populated (depending on the data available for the selected user account):

- Name
- Org. Unit
- Email

- **Contact person data**

Allows to search and select wished contact (IMDS or IHS).

Upon confirmation, below attributes in the event subscription can be populated (depending on the data available for the selected user account):

- Name
- Email

PLEASE NOTE: Only user with activated permission “**ADMIN_EVENT**” can access these buttons.

24.2.4.2 Edit

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

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

24.2.4.3 Delete

An existing event subscription can be deleted upon its selection and click on the “**Delete**” button. This will bring up a small pop-up window (see **Figure 222**). By click on the “**Yes**” button event subscription will be deleted. By click on the “**No**” button, the event subscription will be kept.

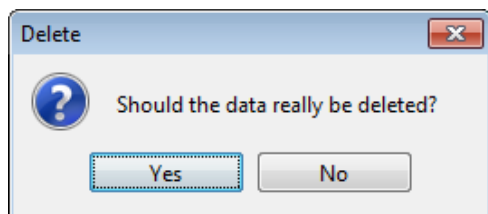


Figure 222 Confirmation of deletion of the event subscription

24.2.4.4 Save

The button is active only in case the event subscription is being created or edited.

By click on it new or updated event subscription is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 223**).

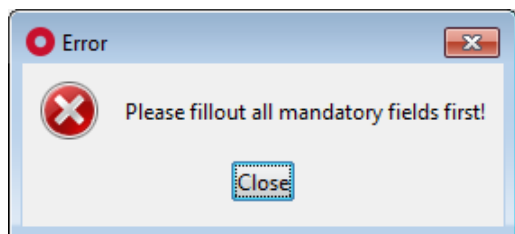


Figure 223 Error message shown on save of the event subscription

24.2.4.5 Cancel

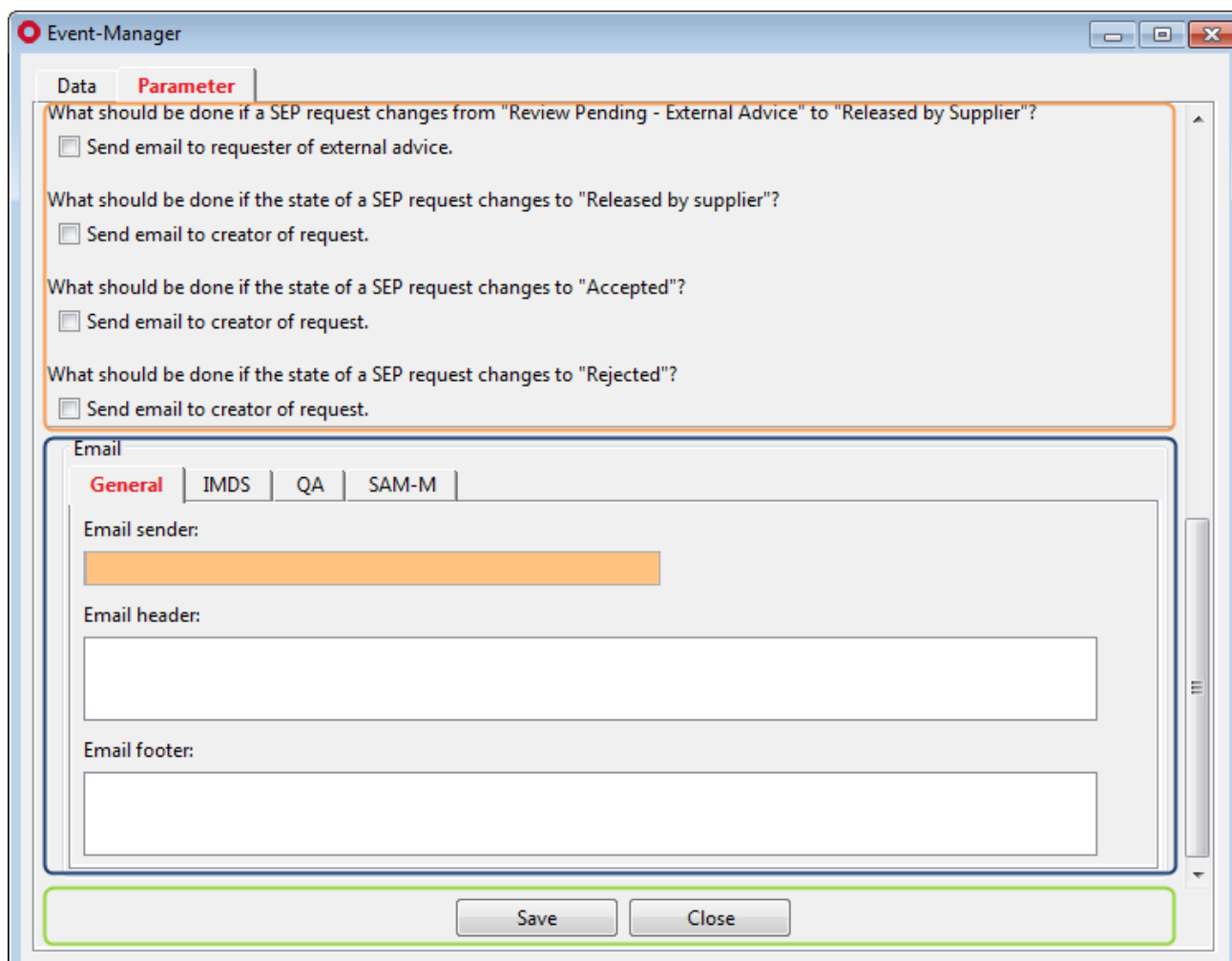
The button is active only in case the event subscription is being created or edited.

By click on it creation or edit of the event subscription is cancelled.

24.3 Parameter

The panel for management of the general parameters for events is split into three areas:

1. General parameters (orange) – see **chapter 24.3.1**
2. Email settings (blue) – see **chapter 24.3.2**
3. Actions (green) – see **chapter 24.3.3**



Event-Manager

Data Parameter

What should be done if a SEP request changes from "Review Pending - External Advice" to "Released by Supplier"?

☐ Send email to requester of external advice.

What should be done if the state of a SEP request changes to "Released by supplier"?

☐ Send email to creator of request.

What should be done if the state of a SEP request changes to "Accepted"?

☐ Send email to creator of request.

What should be done if the state of a SEP request changes to "Rejected"?

☐ Send email to creator of request.

Email

General IMDS QA SAM-M

Email sender:

Email header:

Email footer:

Save Close

Figure 224 Event Manager – “Parameter” tab

24.3.1 General parameters

Enables to set event notifications on a global level.

24.3.1.1 LCM global events

These are displayed only if the LCM module is licensed.

- **What should be done if a LCM request has been rejected?**
Event notification is created when the LCM request is rejected.
This is addressed to the creator of the LCM request.
- **What should be done if a LCM request has been accepted?**
Event notification is created when the LCM request is accepted.
This is addressed to the creator of the LCM request.
- **What should be done if the due date indicator of a LCM request changes to yellow or red?**
Event notification is created when the due date indicator was changed to red for the LCM request.
This can be addressed to the escalation email address set for the project and/or to the creator of the LCM request.
- **What should be done if the state of a LCM request changes to "MDS accepted"?**
Event notification is created when the datasheet that is linked to the LCM request is accepted.
This can be addressed to the creator of the LCM request and/or to the contact person set in the datasheet.
- **What should be done if the state of a LCM request changes to "MDS rejected"?**
Event notification is created when the datasheet that is linked to the LCM request is rejected.
This is addressed to the creator of the LCM request.
- **What should be done, if a IMDS contact has been assigned?**
Event notification is created when the IMDS contact is set in SPM request.
This can be addressed to the assigned IMDS contact with a possibility to include all IMDS contacts.
- **What should be done, if a QA contact has been assigned?**
Event notification is created when the QA contact is set in SPM request.
This can be addressed to the assigned QA contact.

24.3.1.2 SPM global events

These are displayed only if the SPM module is licensed.

- **What should be done if the state of a SPM request changes to "MDS received"?**
Event notification is created when the received datasheet is linked to the SPM request.
This is addressed to the creator of the SPM request.
- **What should be done if the state of a SPM request changes to "MDS accepted"?**
Event notification is created when the datasheet that is linked to the SPM request is accepted.
This is addressed to the creator of the SPM request.

- **What should be done if the state of a SPM request changes to "MDS rejected"?**
Event notification is created when the datasheet that is linked to the SPM request is rejected.
This is addressed to the creator of the SPM request.

24.3.1.3 SEP global events

These are displayed only if the SAM-M module is licensed.

- **What should be done if a SEP request changes from "Review Pending - External Advice" to "Released by Supplier"?**
Event notification is created when external advice for the SEP request is provided.
This is addressed to the requester of external advice.
- **What should be done if the state of a SEP request changes to "Released by supplier"?**
Event notification is created when the declaration for the SEP request is released by the supplier.
This is addressed to the creator of the SEP request.
- **What should be done if the state of a SEP request changes to "Accepted"?**
Event notification is created when the declaration for the SEP request is accepted.
This is addressed to the creator of the SEP request.
- **What should be done if the state of a SEP request changes to "Rejected"?**
Event notification is created when the declaration for the SEP request is rejected.
This is addressed to the creator of the SEP request.

24.3.2 Email settings

Enables to define the details for the email notifications for the event subscriptions.

- **Email sender**
The email address, which is used for sending of event subscription notification emails.
 - General
Used for all general, IMDS, SPM and LCM event subscriptions.
 - IMDS
Used for IMDS contact event subscription.
Displayed only in case the LCM module is licensed.
 - QA
Used for QA contact event subscription.
Displayed only in case the LCM module is licensed.
 - SAM-M
Used for all SEP event subscription.
Displayed only in case the SAM-M module is licensed.

This field is mandatory.
- **Email header**
The email header of the event subscription notification email.
For general notifications, the email header is automatically extended with following details:

Event type	Additional attribute in email header
SPM	Own part number Own part name Due date
LCM	Own part number Own part name Customer part number Customer part name Due date

Table 5 Additional attributes in the header of the event subscription email for LCM and SPM requests

For IMDS and QA contact and for SAM-M notifications, the tags are supported (to see their list and meaning, click on the “?” button).

- **Email footer**

The email header of the reminder event subscription notification email.

For IMDS and QA contact and for SAM-M notifications, the tags are supported (to see their list and meaning, click on the “?” button).

24.3.3 Actions

The following actions are available:

- **Save**
Saves the actual configuration set in the event manager panel.
- **Close**
Closes the event manager panel.

24.4 List of events

Following common event is available:

- **IHS - CSI - Import of rule group**
Event notification is created when new CSI rule group is imported.

Following IMDS event is available:

- **IMDS – Changes on Application Codes**
Event notification is created when there is one of below changes:
 - new, changed or deleted application code
 - new or deleted substance application relations
 - new or deleted application options in the check configurations

Following LCM events are available:

- **LCM - New IMDS request**
Event notification is created when new LCM request is received from IMDS online system.
- **LCM - New request by interface**
Event notification is created when new LCM request is created from the interface.
PLEASE NOTE: This event is relevant only to some customers using this functionality and it will be removed soon for customers for which it is not relevant.
- **LCM - New manually created request**
Event notification is created when new LCM request is created manually.
- **LCM - Request rejected**
Event notification is created when the LCM request is rejected.
- **LCM - Request accepted**
Event notification is created when the LCM request is accepted.
- **LCM - Request deleted or set inactive**
Event notification is created when the LCM request is deleted or set as inactive.
- **LCM - MDS assigned to a request**
Event notification is created when the datasheet is linked to the LCM request (manually or automatically).
- **LCM - Due date in state red reached**
Event notification is created when the due date indicator was changed to red for the LCM request.
- **LCM - Due date in state yellow reached**
Event notification is created when the due date indicator was changed to yellow for the LCM request.
- **LCM - Assigned MDS complete**
Event notification is created when the datasheet that is linked to the LCM request is completed.
- **LCM - Assigned MDS error free**
Event notification is created when the datasheet that is linked to the LCM request is without errors.
- **LCM - Assigned MDS in state 'Ready'**
Event notification is created when the datasheet that is linked to the LCM request is released to "IHS ready" status.
- **LCM - Assigned MDS sent**
Event notification is created when the datasheet that is linked to the LCM request is submitted to the customer.
- **LCM - Assigned MDS rejected**
Event notification is created when the datasheet that is linked to the LCM request is rejected by the customer.

- **LCM - Assigned MDS accepted**
Event notification is created when the datasheet that is linked to the LCM request is accepted by the customer.
- **LCM - IMDS contact assigned**
Event notification is created when the IMDS contact is set in the LCM request.
- **LCM - QA contact assigned**
Event notification is created when the QA contact is set in the LCM request.

Following SEP events are available:

- **SEP - Request sent**
Event notification is created when the SEP request is sent.
- **SEP - Request dunning**
Event notification is created when the reminder email is sent for the SEP request.
- **SEP - Request escalation**
Event notification is created when the escalation email is sent for the SEP request.
- **SEP - Created**
Event notification is created when new SEP request is created.
- **SEP - Supplier assigned**
Event notification is created when the supplier is assigned to the SEP request.
- **SEP - Supplier and contact assigned**
Event notification is created when both, the supplier and the contact are assigned to the SEP request.
- **SEP - Supplier invited**
Event notification is created when the supplier is invited.
PLEASE NOTE: This event is optional and available only if the Material Compliance module is licensed.
- **SEP - Sent**
Event notification is created when the SEP request is sent.
- **SEP - Sent to Supplier**
PLEASE NOTE: This event is optional and available only if the Material Compliance module is licensed.
- **SEP - Rejected by Supplier**
Event notification is created when the SEP request is rejected by the supplier.
- **SEP - Edited by supplier**
Event notification is created when the SEP request is edited by the supplier.
- **SEP - Review pending**
Event notification is created when the review of the SEP request is pending by the supplier.

- **SEP - Released by supplier**
Event notification is created when the declaration for the SEP request is released by the supplier.
- **SEP - Answered manually**
PLEASE NOTE: This event is optional and available only if the Material Compliance module is licensed.
- **SEP - Rejected by system**
Event notification is created when the declaration for the SEP request is rejected automatically by the system.
- **SEP - Rejected by QM**
Event notification is created when the declaration for the SEP request is rejected manually by the reviewer.
- **SEP - Accepted by QM**
Event notification is created when the declaration for the SEP request is accepted manually by the reviewer.
- **SEP - Released**
Event notification is created when the declaration for the SEP request is released.
- **SEP - Finished**
Event notification is created when the SEP request is finished.
- **SEP - Cancelled**
Event notification is created when the SEP request is cancelled.
- **SEP - Re-request created**
PLEASE NOTE: This event is optional and available only if the Material Compliance module is licensed.

Following SPM events are available:

- **SPM - New basic request by dummy position**
Event notification is created when the SPM request is created for the dummy (missing) position.
- **SPM - Request deleted or set inactive**
Event notification is created when the SPM request is deleted or set as inactive.
- **SPM - Request rejected**
Event notification is created when the SPM request is rejected.
- **SPM - Due date in state red reached**
Event notification is created when the due date indicator was changed to red for the SPM request.
- **SPM - MDS received**
Event notification is created when the datasheet is received for the SPM request.
- **SPM - MDS rejected**
Event notification is created when the datasheet is linked with the SPM request is rejected.

- **SPM - MDS accepted**
Event notification is created when the datasheet is linked with the SPM request is accepted.
- **SPM - Supplier assigned**
Event notification is created when the supplier is assigned to the SPM request.
- **SPM - Supplier and contact person assigned**
Event notification is created when both, the supplier and the contact person are assigned to the SPM request.
- **SPM - Supplier no. added**
Event notification is created when the supplier number is added to the SPM request.

25 Car / Product model (optional)

25.1 General

This module is useful to get an overview of all supplier MDS's associated to a car model, and their state. Model is the term used to describe a product or car model.

A car model is created via a PDM import (only with the creation of simple nodes, called "Simple Import"). For more information on PDM import, see chapter 15) Supplier MDS's that are not in the system at the time of the file import, a placeholder will be created and will be shown as a missing position. A car model can also be created manually, if the MDS/Module is in editing mode, by selecting and clicking the icon

"Create new car model"  (which can be found in the drop-down menu below the flatbill button) and is only active on the top level node, and if the user has the user permission "PROGRAM_MODEL_SEARCH".

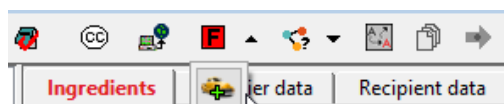


Figure 225 Create a new car model from MDS/modules

25.2 Car / Product model overview

The overview for Car model is in the first tab, on the main search panel.

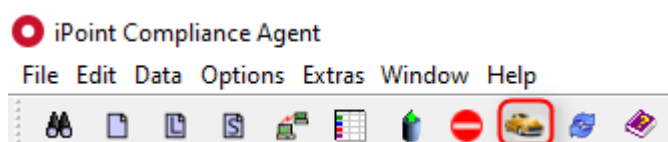


Figure 226 Access Car model from the tool bar

In addition, the menu entry "Data → Car Model" opens the overview, in a separate window (see Figure 227 as an example for Car Model)

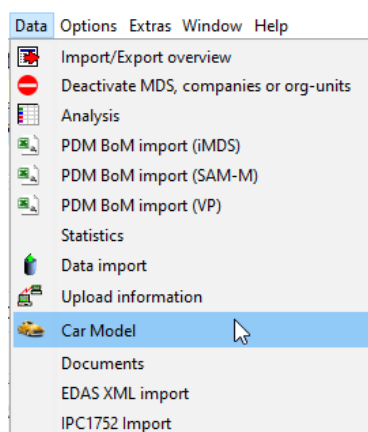
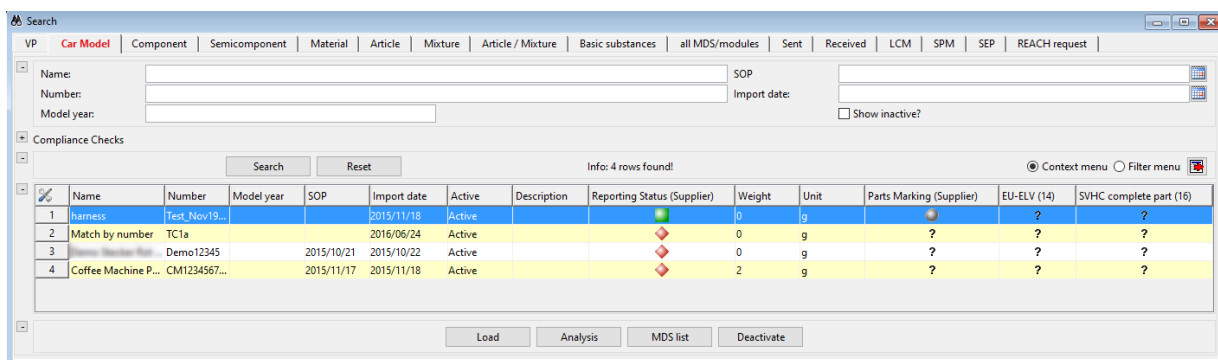


Figure 227 Car Model menu

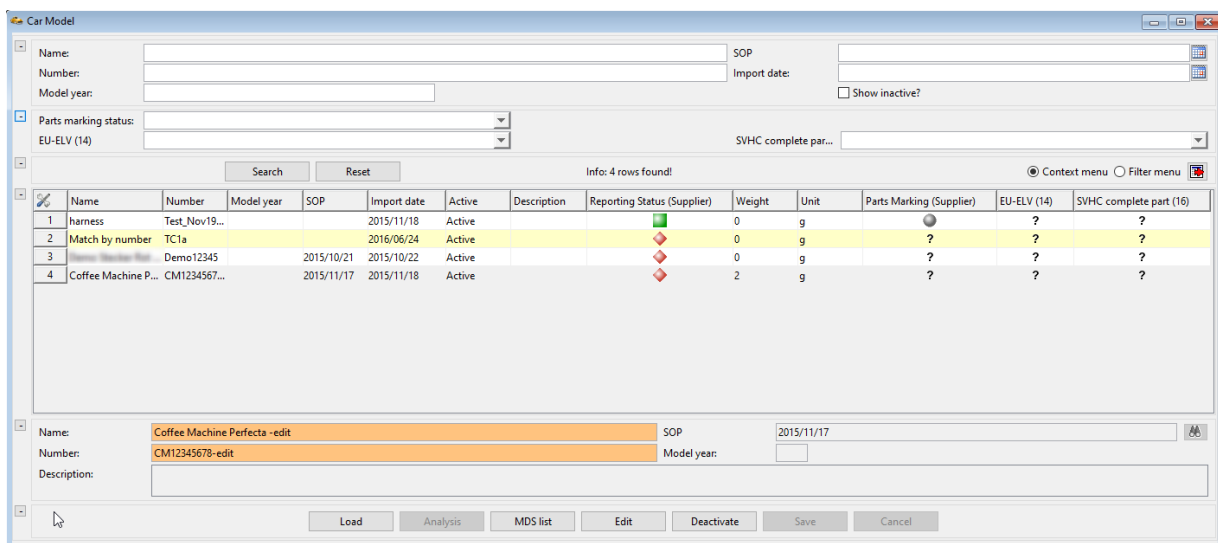
Only users with the user privilege “PROGRAM_MODEL_SEARCH” can open the overview window – if you do not have the appropriate privilege, the functions will be inactive (greyed out).

The car model is created from the part numbers and part names of the imported top-level node. Each created car model can be found and viewed in the overview window. To edit a car model dataset, the overview window, must be opened from the menu entry or the menu icon.



	Name	Number	Model year	SOP	Import date	Active	Description	Reporting Status (Supplier)	Weight	Unit	Parts Marking (Supplier)	EU-ELV (14)	SVHC complete part (16)
1	harness	Test_Nov19...			2015/11/18	Active			0	g		?	?
2	Match by number	TC1a			2016/06/24	Active			0	g	?	?	?
3		Demo12345		2015/10/21	2015/10/22	Active			0	g	?	?	?
4	Coffee Machine P...	CM1234567...		2015/11/17	2015/11/18	Active			2	g	?	?	?

Figure 228 Car model overview tab



	Name	Number	Model year	SOP	Import date	Active	Description	Reporting Status (Supplier)	Weight	Unit	Parts Marking (Supplier)	EU-ELV (14)	SVHC complete part (16)
1	harness	Test_Nov19...			2015/11/18	Active			0	g		?	?
2	Match by number	TC1a			2016/06/24	Active			0	g	?	?	?
3		Demo12345		2015/10/21	2015/10/22	Active			0	g	?	?	?
4	Coffee Machine P...	CM1234567...		2015/11/17	2015/11/18	Active			2	g	?	?	?

Figure 229 Car / Product Model overview

The following search criteria is available:

- **Name**
Name of the car model (Name of the MDS which was imported)
- **Number**
Number of the model (Part no. of the MDS which was imported)
- **Model year**
Model year of the model

- **SOP**
Date for the start of production of the model (known as “Start of Production”)
- **Import date**
Day when the model was created
- **Show inactive**
For searching inactive models

All search criteria is shown as columns in the search result list. Additionally, the list contains the following columns:

- **Reporting Status (Supplier), which can contain the following data:**
 -  Green square
All MDS's related to the car model are available (no missing positions)
 -  Yellow triangle
At least one MDS related to the car model is a MDS that is marked as a **Development Sample Report**, also known as preliminary / prototype MDS, all other MDS's are available
 -  Red diamond
At least one MDS related to the car model is missing (at least one missing position)
- **Weight, this is the measured weight of the related MDS.**
- **The column “Parts Marking (Supplier)” is optional and describes the combined polymeric marking state of all supplier MDS's related to the car model, the following symbols can appear:**
 -  Grey question mark
All MDS related to the car model have not been checked yet
 -  Grey circle
Parts Marking is not required in all MDS's related to the car model
 -  Green square
At least one MDS related to the car model contains a part which is parts marked correctly
 -  Red diamond
At least one MDS related to the car model contains a part which is parts marked incorrectly
- **Column “EU-ELV” is optional, and describes the combined ELV check state related to the car model. The ELV state depends on the related CSI rule group. The following symbols can appear:**
 -  Grey question mark
All MDS's related to the model have not been checked yet
 -  Green square
All MDS's related to the car model have been checked OK
 -  Yellow triangle
At least one MDS related to the car model contains a warnings or information message
 -  Red diamond
At least one MDS related to the car model contains errors

It is possible to integrate a maximum of 10 different CSI rule groups, for checking the MDS's related to the car models. More information can be found in the manual for “Checker configurations and check coverage” in the chapter “Compliance check configuration.”

- **ISO classification columns are optional and contain the cumulated ISO weight of all supplier parts for the car model. There are the following ISO classification columns available:**
 - Metals [g]
 - Glass [g]
 - Others [g]
 - Polymers [g]
 - Fluids [g]
 - Elastomers [g]
 - MONM [g]

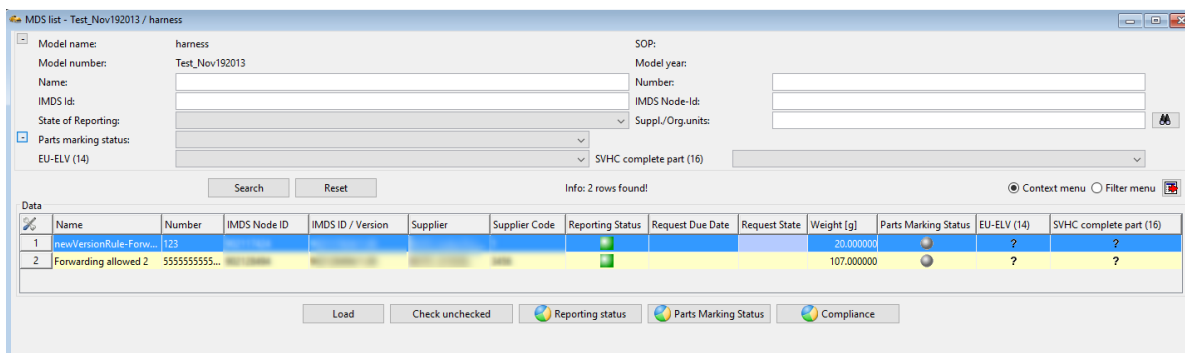
? Grey question mark means, that all entries have not been calculated yet
The mapping between VDA and ISO classification is described in chapter 14.2.3.

The following actions are available in the overview:

- While editing a car model, additional properties (e.g. SOP and model year) can be assigned. If the SOP date has been set or changed, while saving, the MDS's of the car model can be checked, using the CSI rule groups, as configured in the compliance check configuration. If the user chooses to do so, a DB job is created, that will check the MDS's. If no CSI checks are configured no DB job is created.
- The MDS's of the car model can be loaded by selecting "Load".
- By selecting "Analysis" the respective MDS's can be analysed. The window for the MDS/Module analysis will be opened, as described in chapter 13.2. The Analysis button is only activated when a row is selected, and the MDS is of the type component.
- By selecting "MDS list" the overview regarding all MDS and missing positions for the car model is opened.
- If a car model is no longer required, it can be marked as inactive by selecting "Deactivate". Inactive models are only shown in the search results, if the option "Show inactive" has been selected for the search.

25.3 MDS list

The MDS list function provides an overview regarding all assigned MDS's and missing positions for the car model. Additionally, the list shows the check state for specific checks, regarding the associated MDS's. For all entries different statistical charts can be generated.



Model name: harness
Model number: Test_Nov192013
SOP:
Model year:
Name:
IMDS ID:
IMDS Node-id:
State of Reporting:
Suppl./Org.units:
Parts marking status:
EU-ELV (14)
SVHC complete part (16)

Search Reset Info: 2 rows found! Context menu Filter menu

	Name	Number	IMDS Node ID	IMDS ID / Version	Supplier	Supplier Code	Reporting Status	Request Due Date	Request State	Weight [g]	Parts Marking Status	EU-ELV (14)	SVHC complete part (16)
1	newVersionRule-Forw...	123								20.000000		?	?
2	Forwarding allowed 2	5555555555...								107.000000		?	?

Load Check unchecked Reporting status Parts Marking Status Compliance

Figure 230 MDS list

The MDS list contains information regarding the car model and the associated MDS's belonging to it. The supplier MDS list offers the following search criteria:

- **Name**
Name of the supplier MDS
- **Number**
Number of the supplier MDS, also known as Part, Item or Material number
- **IMDS ID**
IMDS module ID assigned in the online IMDS system
- **IMDS Node ID**
The unique ID of this node assigned by the online IMDS system
- **Reporting Status**
Reported: Show all MDS's that are available in the system, for this car model (e.g. accepted supplier MDS)
As DSR MDS available: Shows all MDS's that are marked as DSR and available in the system
Unreported: Show all missing positions
- **Suppl./Org. units**
Search for specific suppliers
- **Parts Marking Status**
Unchecked: Entries that are unchecked. No marking needed: Entries that do not require marking
Marked as required: Entries that have the correct marking
Not marked as required: Entries that do not have the correct marking
- **EU-ELV (optional)**
Unchecked: Entries that have not been checked yet
Checked OK: Entries that have been checked OK
Checked with errors: Entries that have errors
Checked with warnings: Entries that have warnings
Checked with info: Entries that have information

The search panel can contain a maximum of 10 CSI checks, for configured CSI rule groups. More information is available in the manual "Checker configurations and check coverage" in the chapter "Compliance check configuration."

In the search result list, the following columns are available:

- **Name**
Name of the supplier of the MDS
- **Number**
Number of the associated supplier MDS, also known as Part, Item or Material number

- **IMDS Node ID**
The unique ID of this node, assigned in the online IMDS system
- **IMDS ID**
IMDS module ID assigned in the online IMDS system
- **Supplier**
Name and ID of the organisation unit of the supplier
- **Reporting Status**
 -  Green square: Shows that the respective MDS is available
 -  Yellow triangle: Shows that the respective MDS is marked as a Development Sample Report, also known as a preliminary MDS
 -  Red diamond: Shows that the MDS is missing (missing position)
- **Parts Marking Status (optional)**
 -  Grey question mark: Entry has not been checked yet
 -  Grey circle: Polymeric Parts marking not required for this entry
 -  Green square: Entry contains the correct Polymeric Parts Marking
 -  Red diamond: Entry contains an incorrect Polymeric Parts Marking
- **Request Due Date**
Shows the due date of the respective request (if any)
- **Request State**
The state of the request (More details can be found in the SPM manual)
- **ELV EU and more columns for CSI rule groups (optional)**
 -  Grey question mark: Entry has not been checked yet
 -  Green square: Entry was checked OK
 -  Red diamond: Entry contains errors
 -  Yellow triangle: Entry contains a warning or information message
- **<ISO classification> [g] (optional)**
 -  Grey question mark: Entry has not been calculated yet

Material weight in gram: calculated weight for materials that contain the ISO classification of the corresponding column. The mapping between VDA and ISO classification is described in chapter 13.2.3.

The following actions are available in the Supplier MDS list:

- **Load**
To open the selected MDS; not active for missing positions
- **Check unchecked (optional)**
The possibility to execute checks and analysis on those entries that have the grey question mark against them

Available options

- Part Marking Status: Is checked immediately.
- ISO classifications: Is analysed immediately. Now the value can be calculated, only for internally released MDS or modules.
- CSI check: A background job is generated

- **Reporting status**

Generates a statistical pie chart for all entries shown in the search result list, to compare the status of reported vs. unreported MDS's (Parts)

- **Parts Marking Status (optional)**

Generates a statistical pie chart for all entries shown in the search result list, to compare the different states for the polymeric parts marking

- **Compliance (optional)**

Generates a statistical pie chart for each of the configured CSI checks. The percentages for the different status/results of the CSI checks are shown. If several charts are available, they are shown by clicking on the forward/back arrows in the top right corner << >>.

If the "Compliance" button is not visible, either the function is not licensed, or no CSI checks for "Compliance" has been configured in the check configurations. More information is available in the manual "Checker configurations and check coverage" in the chapter "Compliance check configuration".

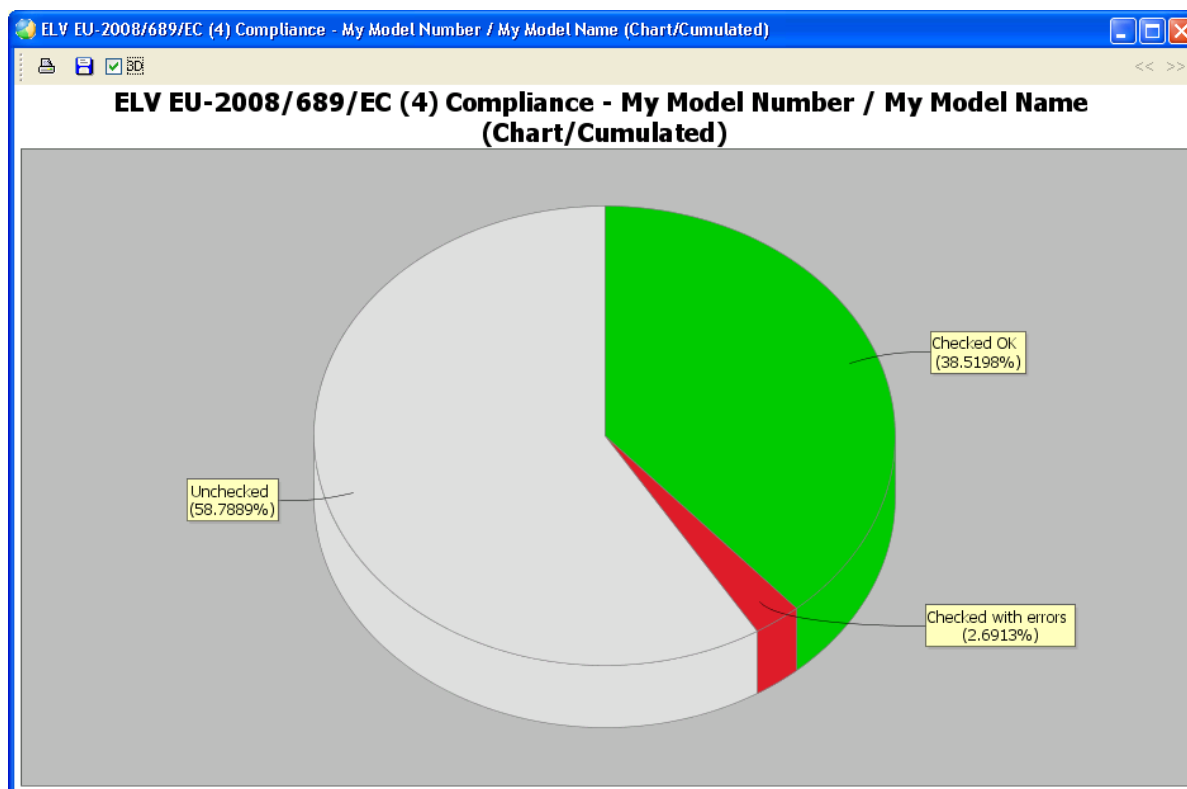


Figure 231 Compliance chart

In an opened chart, you can select how to show the pie chart, either in 2D or 3D. To change to 3D, check the checkbox “3D”. Additionally, it is possible to print the chart, or to save it (as PDF or image) other options may be available, depending on the software you have installed.

If a missing position is deleted manually from the car model, the corresponding missing position entry in the MDS list will also be deleted. If a missing position is replaced with an MDS, the MDS will also be found in the MDS list. For all MDS that are included in the car model, the polymeric parts marking check is performed (if available).

25.4 Polymeric Parts marking check

The displayed results are calculated according to the rules shown in the table below. The rules are applied to the parts in an MDS that contain materials, with the classifications 5.1.x and 5.3. The supplier MDS's are checked, and always the worst status is set. This means, if an MDS contains one correctly identified part, and one part that is not marked correctly, the supplier MDS when checked, will have the state “Entry contains an incorrect Polymeric Mark ” .

Classification	Value	Polymeric Mark	Status
5.1.x	<= 100	No	
5.1.x	<= 100	Yes	
5.1.x	<= 100	Not Applicable	
5.1.x	<= 100	Not Applicable	
5.1.x	> 100	No	
5.1.x	> 100	Yes	
5.1.x	> 100	Not Applicable	
5.1.x	> 100	Not Applicable	
5.3	<= 200	No	
5.3	<= 200	Yes	
5.3	<= 200	Not Applicable	
5.3	<= 200	Not Applicable	
5.3	> 200	No	
5.3	> 200	Yes	
5.3	> 200	Not Applicable	
5.3	> 200	Not Applicable	
All other classifications	-	-	

Table 6 List of possible parts marking statuses

26 Parts weight check (optional)

26.1 Process information for the checking of supplier MDS's

A file with part numbers and their associated weights (kg) must be provided by the customer.

This file will be imported into the iPCA Database, into a separate master data table via a batch process scheduled by the iPEX engine.

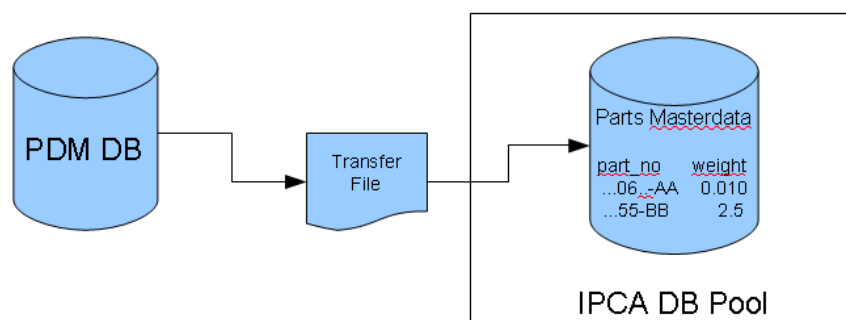
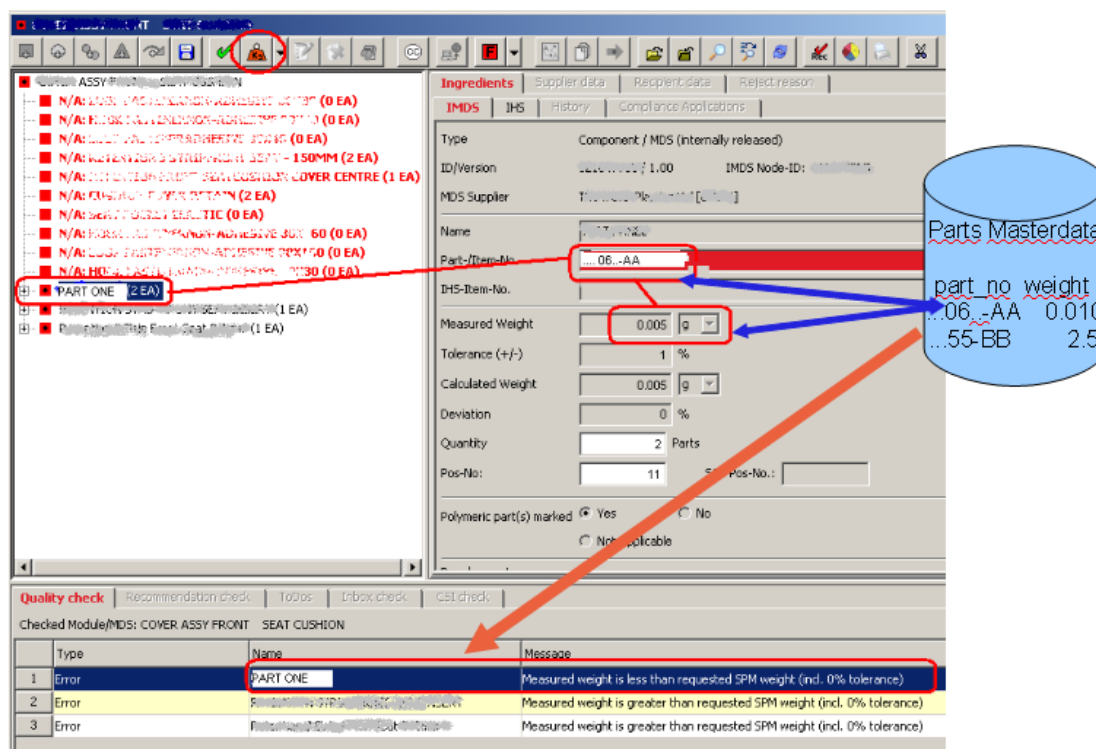


Figure 232 Parts weight check data import

If a MDS/module is in edit mode the user has the ability to check the weight of the referenced supplier MDS against this data. Each of the supplier MDS's part no. will be searched in the masterdata table, and the weight from this table will be compared with the measured weight of the supplier MDS.



part_no	weight
...06-AA	0.010
...55-BB	2.5

Type	Name	Message
1	Part ONE	Measured weight is less than requested SPM weight (incl. 0% tolerance)
2	Part ONE	Measured weight is greater than requested SPM weight (incl. 0% tolerance)
3	Part ONE	Measured weight is greater than requested SPM weight (incl. 0% tolerance)

Figure 233 Parts weight check for supplier MDS

26.2 Check values

- **Check weights of supplier parts (see above)**

An error will be created, if the difference between the weight in the masterdata table, and supplier's part weight exceeds a configurable tolerance.

This tolerance can be edited in the check configurations' parameter window: Menu → Options → Checks → Check configuration.... For the corresponding configuration the parameter is found in the tab General parameters.

- **Check component weight**

This check compares each component nodes' measured weight, against its calculated weight, +/- with the given tolerance. The calculated weight is the sum of all the weight values (measured weights of components, weights for semi components and materials) for the component's direct children at the next level.

This check can also be used for your own MDS/modules, to check if the weight and tolerance values are set correctly, according to the IMDS requirements. Public and received MDS's will not create a message, this is because this check is done in IMDS before sending, or internally releasing a foreign MDS, and therefore it will always be correct.

26.3 Check configuration USC

The parts weight check can be checked using the USC Inbox check.

If it should be checked automatically or if a "ToDo" entry should be created, this must be configured in the check configuration for SCM/USC, in the tab General Checks.

The check for Additional Check – Parts weight check must be edited.

27 Blacklist (optional)

27.1 General

The Blacklist function is an exception list, for managing part numbers that should be disregarded during a PDM import.

There are two types of blacklist records:

- **Only current node**

Possible existing child nodes will be regarded, and processed during import at the level of the Blacklist record matching node. The amount will be regarded, while moving possible existing child nodes to the record matching node level.

Because of the node moving, there could be more than one node with the same number on the same level. In this case, the amount/ weight of the duplicate nodes will be accumulated and merged to one node.

- **Complete structure**

Possible existing child nodes won't be regarded, too

27.2 View / Editing

The Blacklist overview is accessed via the menu entry “Extras → Master data → Blacklist”

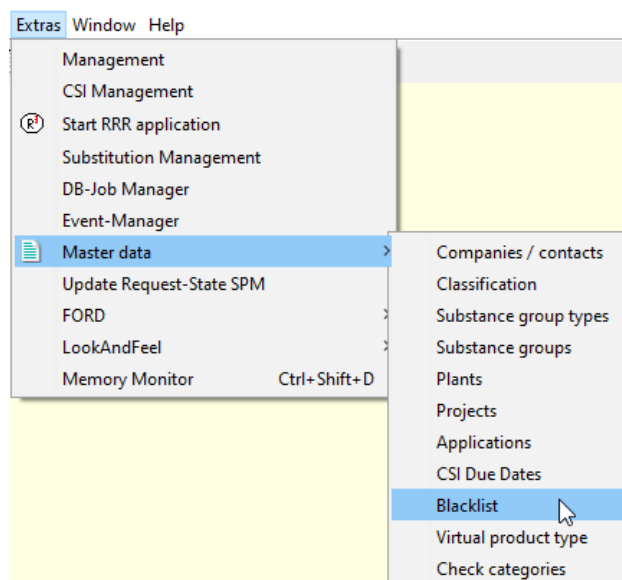


Figure 234 Blacklist access

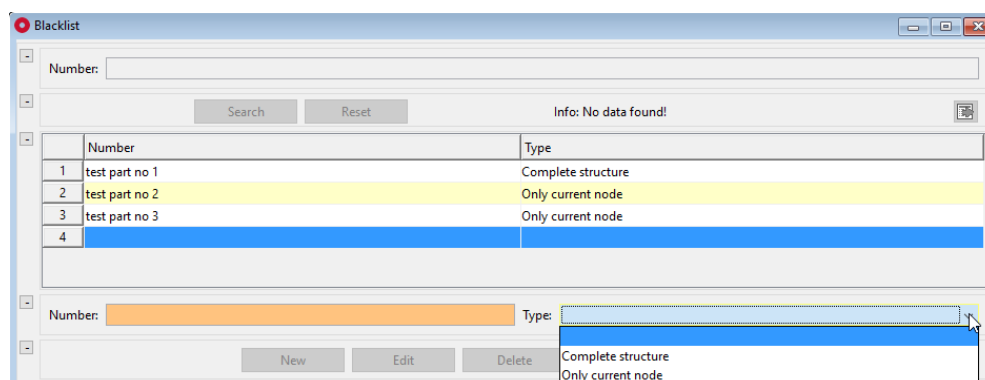


Figure 235 Blacklist overview

The Blacklist overview is for searching, adding new, editing, and deleting Blacklist records.

To open the Blacklist overview the user permission “BLACKLIST_VIEW” is required. For editing, deleting and adding new records the user permission “BLACKLIST_EDIT” is required.

Additionally to adding new records via the Blacklist overview window, there is also the option to add new records directly to the Blacklist via the context menu while in the tree structure view. See chapter 9.3.2 “Functions from the context menu”.

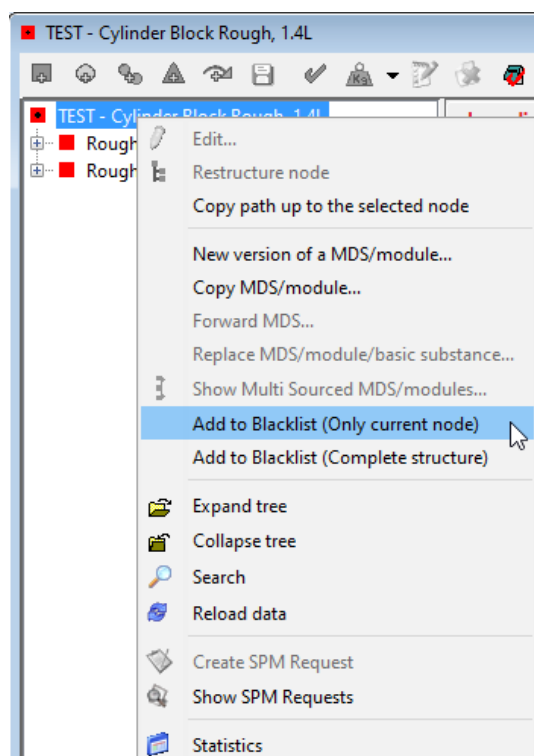


Figure 236 Add to Blacklist from context menu

28 Multi Number Support (optional)

28.1 Overview

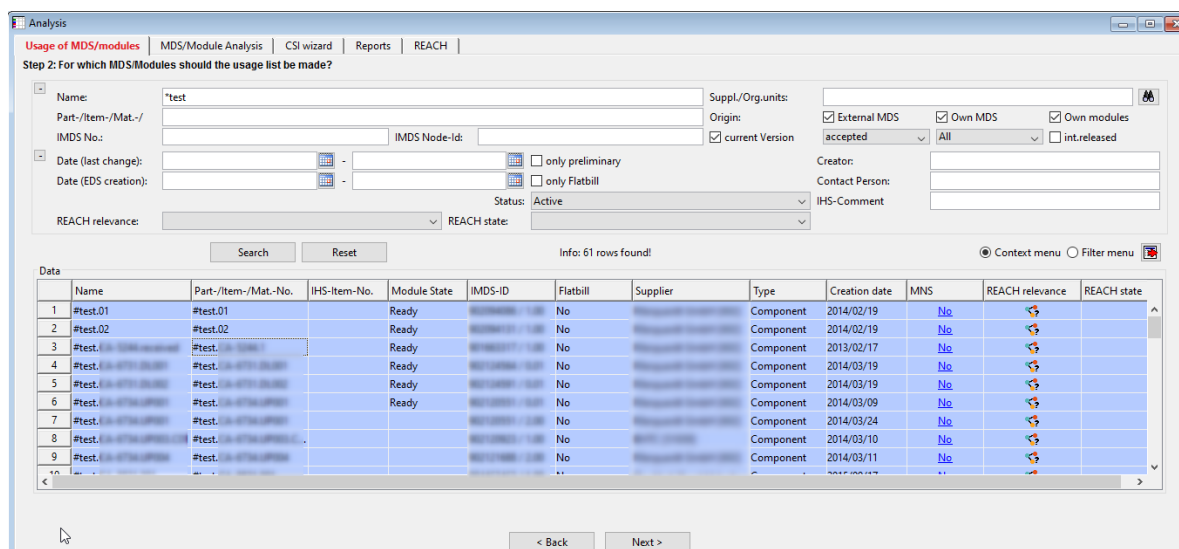
The module Multi Number Support (MNS) allows the assignment of multiple part numbers to a single datasheet, that the datasheet will be identified by. If a datasheet has been assigned multiple part numbers, all the part numbers will be considered for searching, analysing as well as matching for BoM imports.

Important: An MNS can only be assigned to a single datasheet, once. The application will check this while entering a new number or importing a list of numbers to avoid duplicates. Of course, a single part number can be assigned to multiple datasheets.

28.2 Search

With any search for part numbers, all part numbers that are assigned to a datasheet are considered.

The search results will then show, if the found datasheet has multiple numbers assigned or not:



	Name	Part-/Item-/Mat.-No.	IHS-Item-No.	Module State	IMDS-ID	Flatbill	Supplier	Type	Creation date	MNS	REACH relevance	REACH state
1	#test.01	#test.01		Ready	2014/02/19	No		Component	2014/02/19	No		
2	#test.02	#test.02		Ready	2014/02/19	No		Component	2014/02/19	No		
3	#test.03	#test.03		Ready	2013/02/17	No		Component	2013/02/17	No		
4	#test.04	#test.04		Ready	2014/03/19	No		Component	2014/03/19	No		
5	#test.05	#test.05		Ready	2014/03/19	No		Component	2014/03/19	No		
6	#test.06	#test.06		Ready	2014/03/09	No		Component	2014/03/09	No		
7	#test.07	#test.07		Ready	2014/03/24	No		Component	2014/03/24	No		
8	#test.08	#test.08		Ready	2014/03/10	No		Component	2014/03/10	No		
9	#test.09	#test.09		Ready	2014/03/11	No		Component	2014/03/11	No		
10	#test.10	#test.10		Ready	2014/03/17	No		Component	2014/03/17	No		

Figure 237 Search result list with column MNS to provide all numbers assigned to a datasheet.

When selecting the entry in the column MNS, the MNS management window will open (see Figure 239 **MNS Management**).

28.3 Editing

The management of MNS is also available when editing a datasheet. (See red marking):

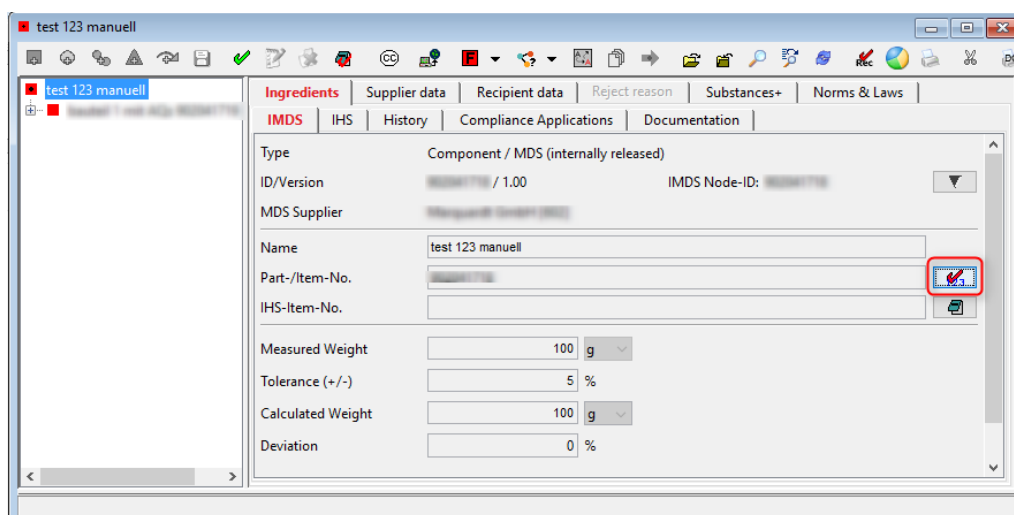


Figure 238 Editing MNS

The icons below are used to visualize if there are already MNS assigned for this datasheet or not. If the datasheet has assigned MNS, they can also be removed

- The datasheet has not been assigned MNS 
- The datasheet has been assigned MNS 

When selecting these icons, the MNS management window will open:

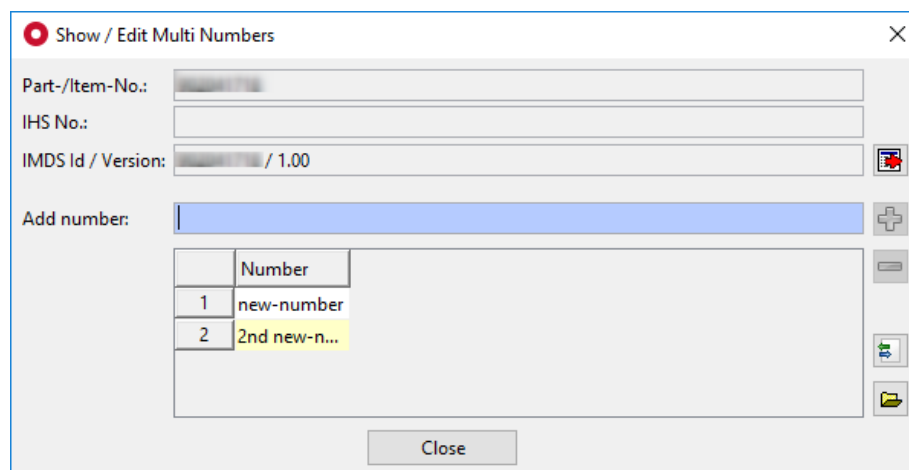


Figure 239 MNS Management

The following functions are available (depending on the privileges assigned to the user)

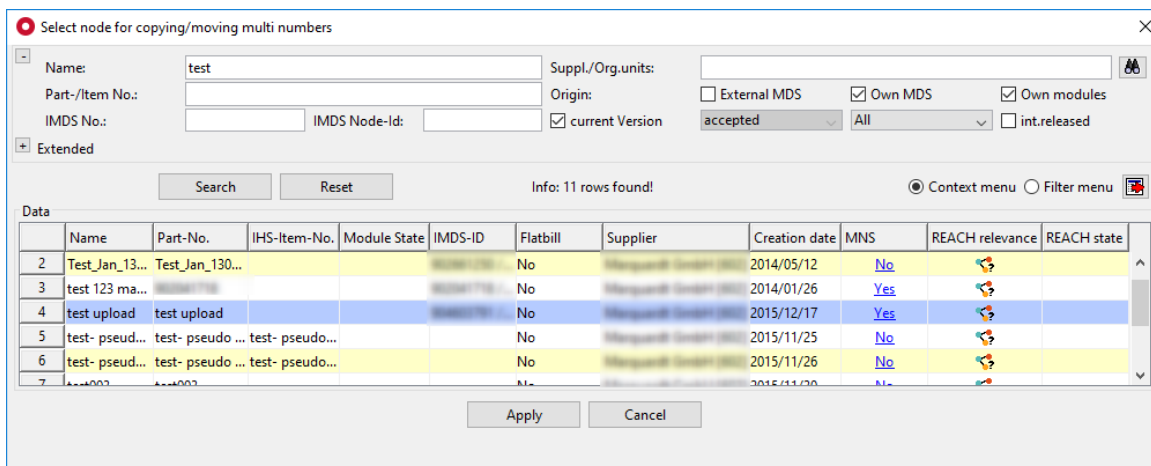
- **Export** 

All MNS are exported to a text file
- **Add a number** 

With this button a new part number can be added. The button will be activated as soon as a part number has been entered into the edit field.
- **Delete a number** 

With this button an already assigned part number, selected in the list can be deleted. The button will be activated when a part number is selected from the list.
- **Copy/Move MNS from another datasheet** 

With this button, MNS from another datasheet can be copied or moved to the current one. A search window will open, when selected. The selected datasheet must already have MNS assigned (Yes) in column MNS. After the selection of the datasheet and using the “Apply” button, the user will be asked whether to copy or move the MNS from the selected datasheet:



Select node for copying/moving multi numbers

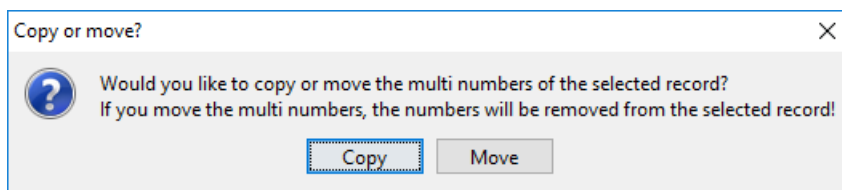
Name: test Suppl./Org.units: Origin: ☐ External MDS ☒ Own MDS ☒ Own modules
Part-/Item No.: ☐ current Version accepted All ☐ int.released
IMDS No.: IMDS Node-Id: ☐ Extended

Search Reset Info: 11 rows found! Context menu Filter menu

	Name	Part-No.	IHS-Item-No.	Module State	IMDS-ID	Flatbill	Supplier	Creation date	MNS	REACH relevance	REACH state
2	Test_Jan_13...	Test_Jan_130...				No	Wegmann GmbH	2014/05/12	No		
3	test 123 ma...					No	Wegmann GmbH	2014/01/26	Yes		
4	test upload	test upload				No	Wegmann GmbH	2015/12/17	Yes		
5	test- pseudo...	test- pseudo ...	test- pseudo...			No	Wegmann GmbH	2015/11/25	No		
6	test- pseudo...	test- pseudo ...	test- pseudo...			No	Wegmann GmbH	2015/11/26	No		
7	test- pseudo...	test- pseudo ...	test- pseudo...			No	Wegmann GmbH	2015/11/26	No		

Apply Cancel

Figure 240 Selecting the datasheet



Copy or move?

Would you like to copy or move the multi numbers of the selected record?
If you move the multi numbers, the numbers will be removed from the selected record!

Copy Move

Figure 241 Copy or Move

- **Copy:**

All MNS will be added to the selected datasheet. The source datasheet will be unchanged.

- **Move:**

All MNS will be added to the selected datasheet, the MNS assigned to the source datasheet will be deleted.

Before the system starts the copy/move process, the user has to confirm the following action:

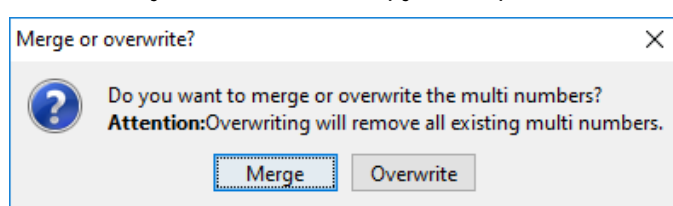


Figure 242 Merge or Overwrite

- **Merge:**

The selected datasheet will contain the previously assigned MNS, along with the MNS assigned to the other datasheet.

The action will be confirmed by the application:

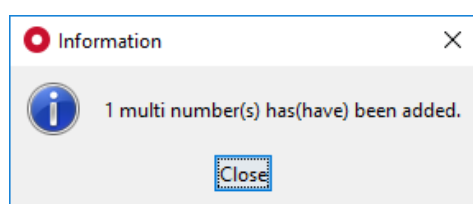


Figure 243 Information

- **Overwrite**

The selected datasheet will have only the MNS from the other datasheet following this action.

The action will be confirmed by the application:

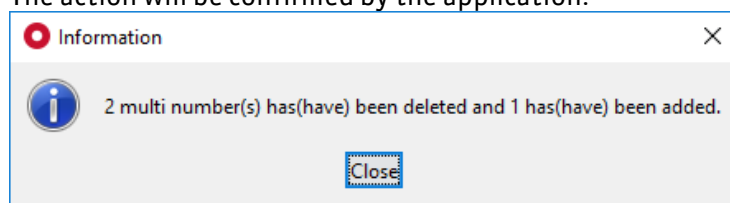


Figure 244 Information confirmed

- **Import of numbers from a text file**



With this function part numbers from a text file can be used and added to datasheet.

This file has to have exactly one part number per line. The file must have the file extension ".txt".

Also for this action the user will be asked whether to merge or overwrite the data as above.

28.4 SPM Request (Optional)

28.4.1.1 Overview

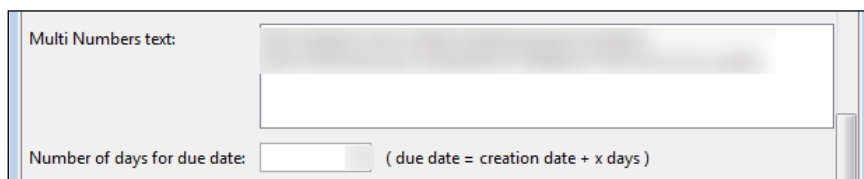
The optional module SPM also supports the MNS functions.

Received datasheets will be identified by all the assigned MNS, and assigned to the related SPM requests.

The requesting email will also have a new block, listing all the MNS assigned to this request. The search result list for SPM requests will have the additional columns “MNS request” and “MNS MDS” to visualize whether a request or the assigned datasheet has MNS assigned. The functionality for these columns is identical to the functions as described in chapter 28.3 “Editing”.

28.4.1.2 Configuration

When assigning MNS to a request, the assigned part numbers will be listed in the requesting email. The text used for this can be set using the standard SPM configuration screen.



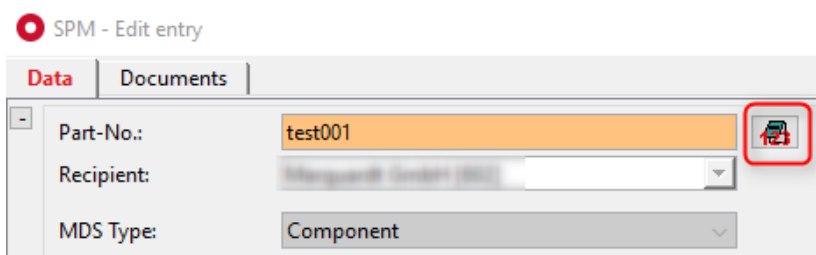
The image shows a configuration window for SPM. It has two main sections. The top section is labeled 'Multi Numbers text:' and contains a large text input field. The bottom section is labeled 'Number of days for due date:' and contains a small numeric input field followed by the text '(due date = creation date + x days)'.

Figure 245 SPM configurations for MNS's

28.4.1.3 Editing

MNS can be assigned to a SPM request, the same way as for datasheets.

See chapter 29.3



The image shows the 'SPM - Edit entry' window. It has two tabs: 'Data' (selected) and 'Documents'. Under the 'Data' tab, there are three fields: 'Part-No.' with the value 'test001', 'Recipient' with a dropdown menu, and 'MDS Type' with a dropdown menu set to 'Component'. A red box highlights a small icon in the top right corner of the 'Part-No.' field.

Figure 246 Editing MNS in SPM

The functionality is as documented in chapter 28.3 “Editing”.

When generating the email text, the reference to the MNS will also be embedded:

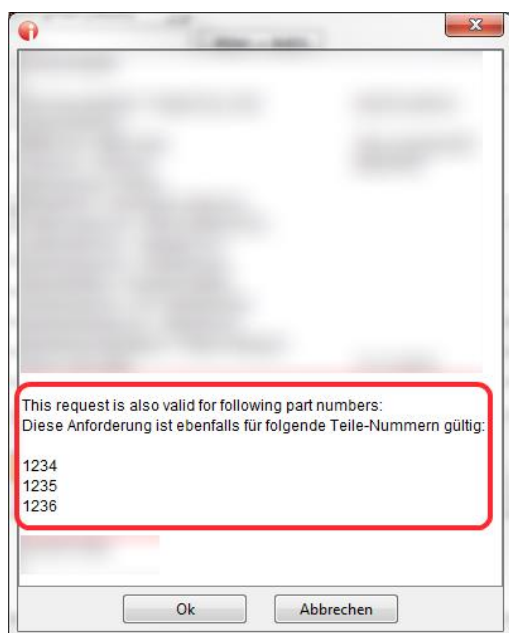


Figure 247 Sample text in SPM with MNS list

28.5 LCM Requests (Optional)

28.5.1 Overview

The optional module LCM also supports MNS.

Your own datasheets will be identified by all the part numbers defined for the LCM request and assigned to the LCM request.

Also for the automated assignment, all MNS for your own datasheets will be taken into account.

28.5.2 Editing

MNS can be assigned to a LCM request, the same as way as for datasheets.

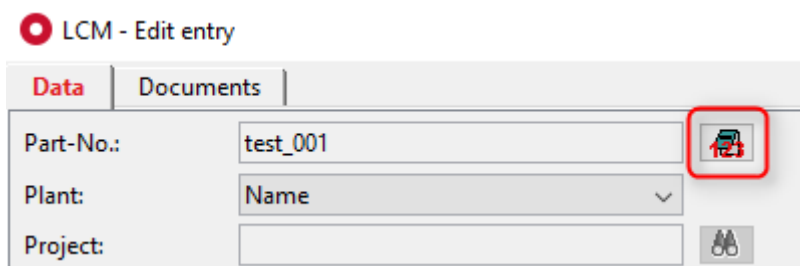


Figure 248 Editing MNS in LCM

The functionality is as documented in chapter 28.3 “Editing”.

28.6 PDM BoM Import

28.6.1 Matching

With all PDM BoM imports, the MNS’s will be considered. The MNS’s will be used with the same priority as the IMDS or IHS associated part numbers. In the structure tree view of a datasheet, the details screen will show the part number that was used to match the referenced MDS.

Deviation	0	%
Quantity	1	Parts
Pos-No:	30	Matched numbers: 1.0000

Figure 249 Visualization of the matched part number after PDM BoM import

28.6.2 Replacing Missing Positions

The function “Replace missing positions “is aware of all part numbers assigned to a datasheet.

28.7 Permissions

The following user permissions are available:

- **MNS_EDIT**
Permission to manage MNS
- **MNS_IMPORT**
Permission to import MNS from a text file

29 MDS bulk transfer (optional)

The purpose of this import is to submit datasheets which references to are detailed in the import file to the defined customer.

29.1 Configuration

The parameter “**MDS_BULK_TRANSFER_UPLOAD_METHOD**” is used for the configuration of the method of the submission of the MDS to the selected recipient:

- If set to “**PROPOSE**”, the MDS will be proposed to the customer
- If set to “**SEND**”, the MDS will be send to the customer

29.2 Import file format

For the MDS bulk transfer import, the import file must comply with the requirements detailed in the **Table 3** and **Table 8**.

No.	Column Name	Mandatory	Length	Format	Comment
1	Part number	no	50	alphanumeric	
2	IMDS ID	no	18	numeric	
3	Version	no	3	numeric	The version must be provided as full number without decimal places. Otherwise it is ignored.
4	Customer part number	yes	50	alphanumeric	
5	Customer description	yes	250	alphanumeric	
6	Purchase Order No.	no	20	alphanumeric	
7	Bill of Delivery No.	no	30	alphanumeric	
8	Drawing No.	no	20	alphanumeric	
9	Drawing change level	no	30	alphanumeric	
10	Drawing Date	no	20	alphanumeric	
11	Report No.	no	20	alphanumeric	
12	Report Date	no		date (DD.MM.YYYY)	
13	Supplier Code	no (yes if customer is one of	20	alphanumeric	

No.	Column Name	Mandatory	Length	Format	Comment
		listed below the table)			
14	Forwarding allowed	no	3	alpha	Possible values (no case sensitive): Yes – forwarding allowed No – forwarding not allowed <empty> - considered as “No”
15	Supplier Site Code	no	20	alphanumeric	Considered only if the selected customer is: Ford (102) Jaguar Land Rover Volvo (106)
16	Supplementary Code 1	no	4	alphanumeric	Considered only if the selected customer is: Daimler (101)
17	Supplementary Code 2	no	4	alphanumeric	Considered only if the selected customer is: Daimler (101)
18	Drawing Geometry Technical Level	no	3	numeric	Considered only if the selected customer is: Daimler (101)
19	Multiple part numbers	no	1000	alphanumeric	Considered only if the selected customer is: Fiat (1316) The value separator is comma “,”.
20	Index Renault part	no (yes if customer is Renault (10753))	3	alphanumeric (allowed values ---, --A, --B, ..., -AA, -AB, ..., AAA, AAB, ..., ZZZ)	Considered only if the selected customer is: Renault (10753)
21	E-mail of the designer	no (yes if customer is Renault (10753))	80	alphanumeric	Considered only if the selected customer is: Renault (10753)
22	Index of the standard	no	3	alphanumeric	Considered only if the selected customer is:

No.	Column Name	Mandatory	Length	Format	Comment
		(yes if customer is Renault (10753))		(allowed values ---, --A, --B, ..., -AA, -AB, ..., AAA, AAB, ..., ZZZ)	Renault (10753)
23	Index PSA part	no (yes if customer is PSA (176995))	2	alphanumeric	Considered only if the selected customer is: PSA (176995)
24	PSA recipient e-mail	no (yes if customer is PSA (176995))	80	alphanumeric	Considered only if the selected customer is: PSA (176995)
25	MACSI number	no (yes if customer is PSA (176995))	8	numeric	Considered only if the selected customer is: PSA (176995)

Table 7 MDS bulk transfer import file structure

Supplier code (column 13) is mandatory, if one of below listed customers (including all organization units) is picked for the MDS bulk transfer process:

- Daimler (101)
- Ford (102)
- Adam Opel (104)
- Volvo Car Corporation (106)
- Volkswagen AG (107)
- Jaguar Land Rover Limited (297)
- Aston Martin Lagonda Ltd (10595)
- TOYOTA MOTOR CORPORATION (10674)
- Renault (10753)
- NISSAN MOTOR CO.,LTD (13662)
- Volvo Group (46569)
- Chrysler LLC (71459)
- PSA (176995)

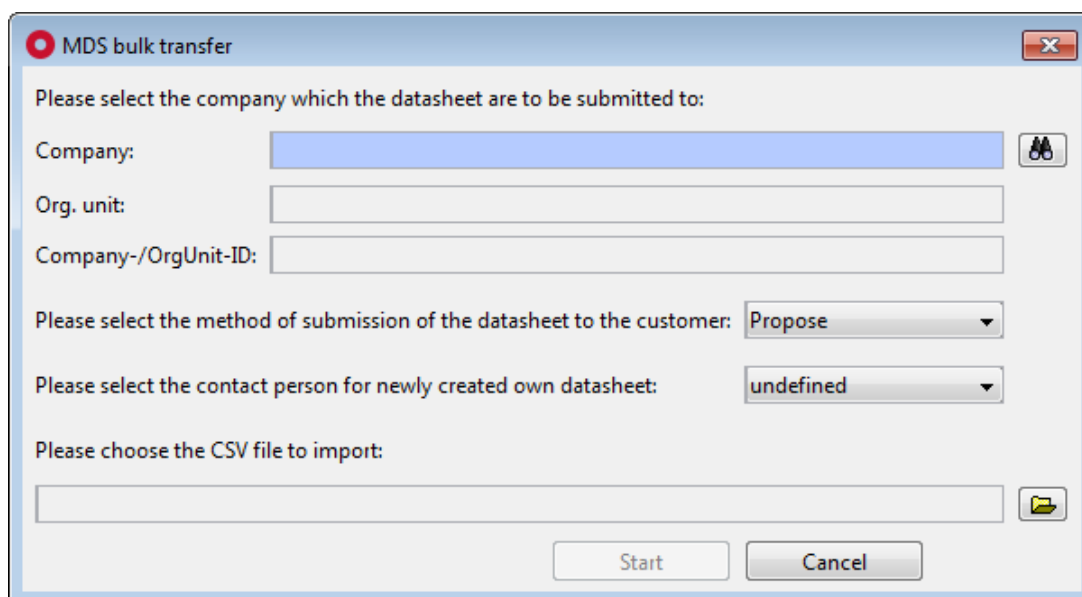
Requirement	Value
File format	CSV
Column separator	TAB
Line separator	"\r\n" (CRLF)
Leading/trailing spaces	not allowed

Table 8 Additional requirements on the MDS bulk transfer import file

29.3 Starting the import

Import screen can be accessed in IPCA via “**Data → MDS bulk transfer**”.

This loads a dialog window (see Figure 250).



The dialog window titled "MDS bulk transfer" contains the following fields and controls:

- Please select the company which the datasheet are to be submitted to:**
 - Company: [Text field with a company icon button]
 - Org. unit: [Text field]
 - Company-/OrgUnit-ID: [Text field]
- Please select the method of submission of the datasheet to the customer:** [Propose (dropdown menu)]
- Please select the contact person for newly created own datasheet:** [undefined (dropdown menu)]
- Please choose the CSV file to import:** [Text field with a file explorer icon button]
- Buttons: [Start] [Cancel]

Figure 250 Dialog for start of the MDS bulk transfer

First the company to which the datasheets are to be submitted to must be selected using the  button, which will load standard IMDS company search window. Wished company part can be then confirmed by click on the “**Apply**” button.

The method of submission of the datasheets to the customer is pre-populated based on the configuration of the “**MDS_BULK_TRANSFER_UPLOAD_METHOD**” configuration parameter (see **chapter 29.1**) but it can be changed by the user.

The contact person used for datasheets created by the MDS bulk transfer process is not pre-populated and must be defined by the user.

Then, an import file needs to be selected by click on the  button. This loads standard open dialog window. Wished file can be confirmed by click on the “**Open**” button.

On this, the simple validation check is done against the selected CSV import file. Each row is checked and in case the number of columns defined in it is not matching the number of columns as per import file format specification (see **chapter 20.5.1**), the error message is raised (see **Figure 251**).

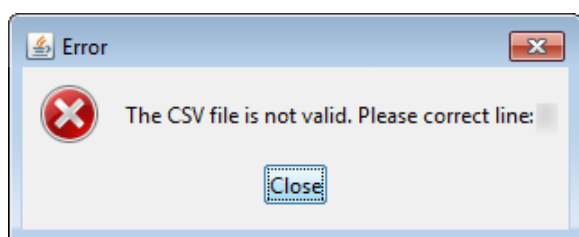


Figure 251 Error message shown if the import file contains row(s) that are invalid

The “**Start**” button is enabled only in case that company, method of datasheets submission, contact person for datasheets and import file are defined.

Upon the click on the “**Start**” button, the check verifying if selected method of submission is allowed for selected customer or not (see **chapter 4.2.3.3.1** in the check coverage user manual):

- If **yes**, the MDS bulk transfer process will be started and the information message will be shown to the user (see **Figure 252**)
- If **not**, the error message will be shown to the user and the MDS bulk transfer process will not be started (see **Figure 253**)

If selected method of submission is allowed for selected customer,

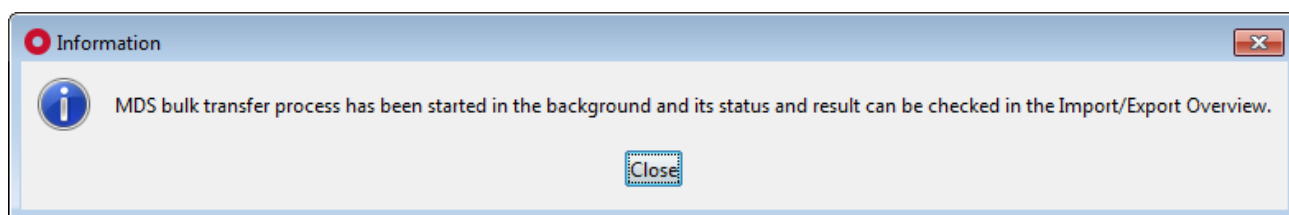


Figure 252 Information message that the MDS bulk transfer process has been started

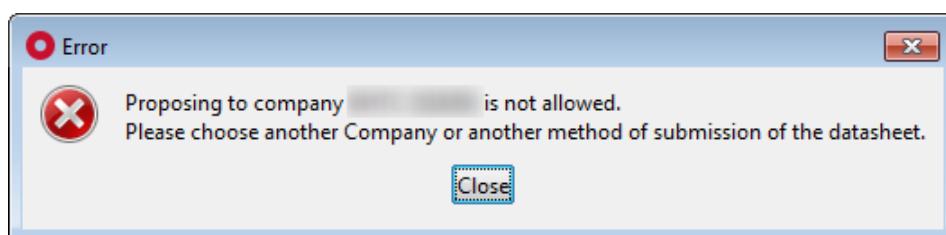


Figure 253 Error message shown if selected method of submission is not allowed for selected customer

PLEASE NOTE: Only user with activated permission “**MDS_BULK_TRANSFER**” can access MDS bulk transfer import dialog window.

29.4 Import process

29.4.1 Selection of the source MDS and preparation of MDS for upload

The import file will be processed one row by another. Each row contains a reference to an MDS defined by the part number or by the IMDS ID (and version).

For each picked row, the documentation in the MDS bulk transfer log is done. Once the processing of the row is finished or could not be finished due to found error, the documentation is done in the MDS bulk transfer log.

For each row, the below process will be performed.

29.4.1.1 Row population check

It will be checked if all the mandatory columns are populated with the value (the value itself is not evaluated).

- In **all cases, columns 4 and 5** must be populated
- In case the customer selected in the MDS bulk transfer dialog is one of the listed in the **chapter 20.5.1** under the import file specification table, then also **column 13** must be populated
- In case the customer selected in the MDS bulk transfer dialog panel is **Renault** (company ID 10753) then **also columns 20, 21, 22** must be populated
- In case the customer selected in the MDS bulk transfer dialog panel is **PSA** (company ID 176995) then **also columns 23, 24, 25** must be populated

In case that not all mandatory columns are populated, this is documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file.

29.4.1.2 Selection of the MDS for MDS bulk transfer process

After the initial check of the import file, the process for picking the source MDS for the MDS bulk transfer will be started. This MDS will be then used for the rest of the MDS bulk transfer process.

First, the approach for selection of the target MDS for the MDS bulk transfer needs to be selected. For this it will be checked if IMDS ID (column 2) is populated

- If **not**, it will be checked if **Part Number (column 1) is populated**
 - If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
 - If **yes**, the MDS bulk transfer process will continue with steps documented in **chapter 29.4.1.2.1**
- If **yes**, it will be checked if **Version (column 3) is populated**
 - If **not**, it will be checked if **least one MDS with defined IMDS ID is found**

- If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
- If **yes**, it will be checked **if the latest version of MDS with defined IMDS ID is received accepted MDS**
 - If **not**, it will be checked if the latest version of MDS with defined IMDS ID is own internally released MDS
 - If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
 - If **yes**, this MDS will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue with steps documented in **chapter 29.4.1.3**
 - If **yes**, this MDS will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue with steps documented in **chapter 29.4.1.3**
- If **yes**, it will be checked **if the MDS with defined IMDS ID and version is found**
 - If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
 - If **yes**, it will be **checked if this MDS with defined IMDS ID and Version is received accepted MDS**
 - If **not**, it will be **checked if the latest version of MDS with defined IMDS ID is own internally released MDS**
 - If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
 - If **yes**, this MDS will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue with steps documented in **chapter 29.4.1.3**
 - If **yes**, this MDS will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue with steps documented in **chapter 29.4.1.3**

29.4.1.2.1 Part number match

It will be **checked if at least one received accepted MDSs or one own internally released MDSs with matching part number exists in the system**

- If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
- If **yes**, the list of all received accepted MDSs and own internally released MDSs with matching part number will be created, this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue

Then the created list of MDSs will be processed further

- In case that only received accepted MDSs will be contained, it will be checked **if more than one MDS is having the same acceptance date**

- If **not**, the MDS with latest acceptance date will be picked and this will be documented in the MDS bulk transfer and MDS bulk transfer process will continue
- If **yes**, the MDS with latest acceptance date and highest IMDS Node ID will be picked and this will be documented in the MDS bulk transfer and MDS bulk transfer process will continue
- In case that only own internally released MDSs will be contained, it will be **checked if more than one MDS is having the same internal release date**
 - If **not**, the MDS with latest internal released date will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue
 - If **yes**, the MDS with latest internal released date and highest IMDS Node ID will be picked and this will be documented in the MDS bulk transfer log (and MDS bulk transfer process will continue
- In case that both, received accepted and internally released MDSs will be contained, it will be checked **if there is at least one received accepted MDS and one own internally released MDS having the same acceptance and internally release date**
 - If **not**, the MDS with latest internal released date will be picked and this will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue
 - If **yes**, it is checked **if the most recently accepted external MDS was accepted after the most recently own internally released MDS was internally released**
 - If **not**, the MDS with latest internal released date will be picked and will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue
 - If **yes**, the MDS with latest acceptance date will be picked and will be documented in the MDS bulk transfer log and MDS bulk transfer process will continue

29.4.1.3 Preparation of the MDS for next steps of the MDS bulk transfer process

Next steps of the process depend on the origin of the MDS selected in the previous step

- **Received accepted**
 - It will be checked if the "**forwarding allowed**" checkbox is checked in the recipient data page (meaning that the MDS can be forwarded)
 - If **not**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
 - If **yes**, it will be checked **if an own MDS was already (in the past) created by the forwarding process exists for picked received accepted MDS**
 - If **not**, an own MDS will be created by the forwarding process from the picked received accepted MDS and this is documented in the MDS bulk transfer log and MDS bulk import process continues
 - If **yes**, it will be checked, **if there already exists a recipient entry for a customer that was selected in the MDS bulk upload dialog panel**

- If **not**, new recipient entry will be added and this will be documented in the MDS bulk transfer log and MDS bulk import process will continue
 - If **yes**, this will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file
- **Own internally released**
 - It will be checked, **if there already exists a recipient entry for a customer that was selected in the MDS bulk upload dialog panel**
 - If **not**, new recipient entry will be added and this will be documented in the MDS bulk transfer log and MDS bulk import process will continue
 - If **yes**, this will be documented in the MDS bulk transfer and the process will be restarted with the next row from the import file

29.4.2 Execution of quality check

After addition of the recipient record for the customer selected in the MDS bulk transfer dialog panel, the quality checks will be triggered.

Results with type “**Warning**” and “**Info**” will be documented in the MDS bulk transfer log but they will not cause the end of the MDS bulk transfer process.

Results with type “**Error**” will be handled as follows:

- In case the message of the error is “**AQ not set**”, this will be documented in the MDS bulk transfer log and the process will need to pick appropriate application code for the given substance same as this is done if user manually finds the particular substance and checks if the application code assigned by the system is correct. **PLEASE NOTE:** The assignment of the application code can be done only in case of referenced material and semicomponent datasheets (regardless of the origin).
- In all other cases, results will be documented in the MDS bulk transfer log and the process will be restarted with the next row from the import file.

29.4.3 Execution of IHS ready check (and setting of IHS ready status)

In case the quality checked will be passed, the execution of the IHS ready check will be triggered.

Results with type “**Warning**” and “**Info**” will be documented in the MDS bulk transfer log but they will not cause the end of the MDS bulk transfer progress.

Results with type “**Error**” will be documented in the MDS bulk transfer and the process will be restarted with the next row from the import file.

In case the IHS ready check will pass and:

- the checked MDS is not yet set to IHS ready status or does not have an IMDS module ID, the MDS will be set to the IHS ready state status, this will be documented in the MDS bulk transfer log and MDS bulk import process will continue
- the checked MDS is already in IHS ready status or has an IMDS module ID, this will be documented in the MDS bulk transfer log and MDS bulk import process will continue

29.4.4 Setting MDS for upload to IMDS

In case the IHS ready check will be passed, the MDS is set for an upload to IMDS online system.

The type of the upload action depends on the configuration parameter "**MDS_BULK_TRANSFER_UPLOAD_METHOD**" (for details see **chapter 29.1**):

- upload including propose (if value of the above-mentioned parameter will be set to "**PROPOSE**")
- upload including send (if value of the above-mentioned parameter will be set to "**SEND**")

This will be documented in the MDS bulk transfer log.

29.5 Import history

The history of MDS bulk transfer import could be seen in the „**Data → Import/Export Overview**“.

In order to see just MDS bulk transfer import, the type "**DS bulk transfer**" needs to be chosen.

The status of the particular MDS bulk transfer can be seen in the "**State**" column:

- **Open**
New entry or MDS bulk transfer that is not yet processed
- **In process**
MDS bulk transfer is in process
- **Unsuccessful**
Not a single MDS was transferred to the customer
- **Successful with errors**
At least one MDS was transferred to the customer
- **Successful**
All MDS were transferred to the customer

For all details about "**Import/Export Overview**", please refer to the **IHS user manual, chapter 19**.

30 Compare (optional)

The purpose of this is to compare 2-5 own MDSs/modules or received MDSs against different attributes.

30.1 Launching the comparison

The comparison can be triggered by from below tabs:

- Component
- Received

30.2 Comparison – Step 1

To get comparison results comparison type and set of data to be displayed needs to be selected.

Comparison type:

- **Part Numbers**
Allows to compare the part/item/material numbers contained in the objects selected for comparison.
- **Materials**
Allows to compare the materials contained in the objects selected for comparison.
- **Substances**
Allows to compare the substances contained in the objects selected for comparison.
- **Material Classification ISO**
Allows to compare the ISO material classifications contained in the objects selected for comparison.
- **Material Classification VDA**
Allows to compare the VDA material classifications contained in the objects selected for comparison.

Display:

- **All results**
Displays all records based on selected comparison type regardless the fact if they are the same or different in all objects selected for comparison.
- **Only the same**
Displays only those records based on selected comparison type, that are the same in all objects selected for comparison.
- **Only differences**
Displays only those records based on selected comparison type, that not the same in all objects selected for comparison

To get results, the user needs to click on the “**Next >**” button in Step 1.

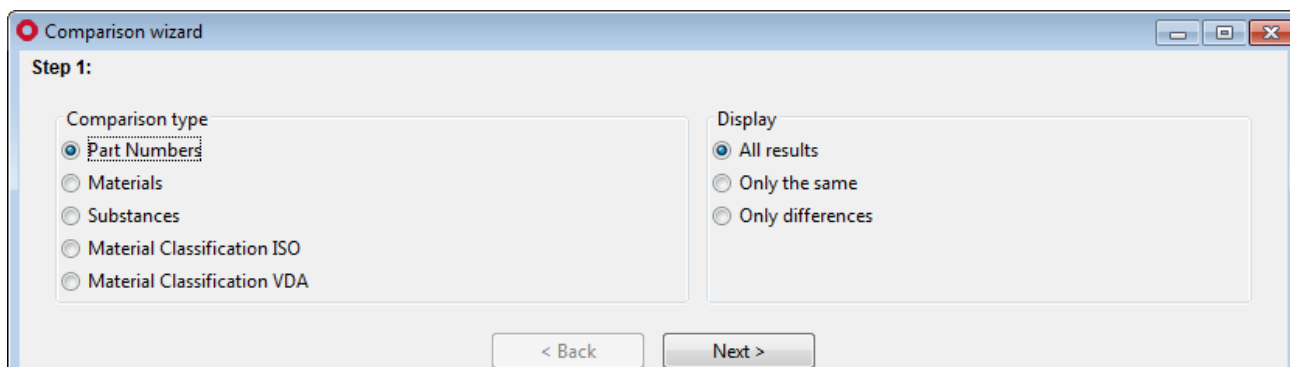


Figure 254 Comparison wizard – Step 1

30.3 Comparison – Step 2

Results are displayed in a table the columns vary based on the selected comparison type:

- Part Numbers**

Column No.	Column Name	Description / Comment
1	Part Number	Part number of the component, semi-component or material contained in at least one of the compared objects
2	Status	Green – part number is present in all compared objects and its weight is the same in all of them Yellow - part number is present in all compared objects but its weight is not the same in all of them Red - part number is not present in all compared objects
(n*3)	IMDS ID / Version	empty - IMDS ID / Version is available yet for record holding the part number in the n-th compared object not present - record holding the part number is not present in the n-th compared object missing position - record holding the part number is present in the n-th compared object as a missing position IMDS ID / Version - IMDS ID / Version of the record holding the part number in the n-th compared object
(n*3)+1	Quantity	quantity - quantity of record from n-th compared object (filled only for component and semi-component) empty - for material or if the value in “ IMDS ID / Version ” column is “ not present ”
(n*3)+2	Weight [g]	weight - measured weight of record from n-th compared object empty - the value in “ IMDS ID / Version ” column is “ not present ”

Table 9 Compare – Result list for part numbers comparison

- Materials

Column No.	Column Name	Description / Comment
1	IMDS ID / Version	IMDS ID / Version of the material contained in at least one of the compared objects
2	Material Name	VDA Material name as defined in " Name " field of the material
3	Status	Green – material is present in all compared objects and its weight is the same in all of them Yellow - material is present in all compared objects but its weight is not the same in all of them Red - material is not present in all compared objects
4	Classification	Material classification as defined in " Classification " field of the material
5	Std. Mat. No.	Standard material number as defined in " Std. Material No. " field of the material
6	Symbol	Symbol as defined in " Symbol " field of the material
(n*3)+4	Weight [g]	weight – measured weight of the material in record from n-th compared object not present in - material is not present in n-th compared object
(n*3)+5	Percent [%]	percentage - portion of the material in the n-th compared object not present in - material is not present in n-th compared object

Table 10 Compare – Result list for materials comparison

- Substances

Column No.	Column Name	Description / Comment
1	Substance Name	Name of the substance contained in at least one of the compared objects
2	Status	Green – substance is present in all compared objects and its weight is the same in all of them Yellow - substance is present in all compared objects but its weight is not the same in all of them Red - substance is not present in all compared objects
3	CAS No.	CAS No. of the substance
4	GADSL / SVHC	GADSL / SVHC flags of the substance
5	Einecs / Elincs	Einecs / Elincs of the substance
6	EU-Index	EU- Index of the substance
7	IMDS ID / Version	IMDS ID / Version - IMDS ID / Version material containing the substance

Column No.	Column Name	Description / Comment
		empty - material containing the substance was not yet uploaded to IMDS online system
8	Material Name	Name of the material containing the substance
(n*3)+6	Weight [g]	weight –weight of the substance in material from n-th compared object not present in - substance is not present in material in n-th compared object
(n*3)+7	Percent [%]	percentage - portion of the substance in material from n-th compared object not present in - substance is not present in material in n-th compared object

Table 11 Compare – Result list for substances comparison

- Material Classification ISO**

Column No.	Column Name	Description / Comment
1	Description	ISO material classification of the material contained in at least one of the compared objects
2	Status	Green – ISO material classification is present in all compared objects and its weight is the same in all of them Yellow - ISO material classification is present in all compared objects but its weight is not the same in all of them Red - ISO material classification is not present in all compared objects
(n*3)	Weight [g]	weight – measured weight of the materials belonging to certain ISO classification in the n-th compared object not present in - ISO material classification is not present in n-th compared object
(n*3)+1	Percent [%]	percentage - portion of the materials belonging to certain ISO classification in the n-th compared object not present in - ISO material classification is not present in n-th compared object

Table 12 Compare – Result list for material classification ISO comparison

- Material Classification VDA**

Column No.	Column Name	Description / Comment
1	Description	Description of the VDA material classification of the material contained in at least one of the compared objects
2	Classification	ID of the VDA material classification of the material

Column No.	Column Name	Description / Comment
3	Status	Green – VDA material classification is present in all compared objects and its weight is the same in all of them Yellow - VDA material classification is present in all compared objects but its weight is not the same in all of them Red - VDA material classification is not present in all compared objects
(n*3)+1	Weight [g]	weight – measured weight of the materials belonging to certain VDA classification in the n-th compared object not present in - VDA material classification is not present in n-th compared object
(n*3)+2	Percent [%]	percentage - portion of the materials belonging to certain VDA classification in the n-th compared object not present in - VDA material classification is not present in n-th compared object

Table 13 Compare – Result list for material classification VDA comparison

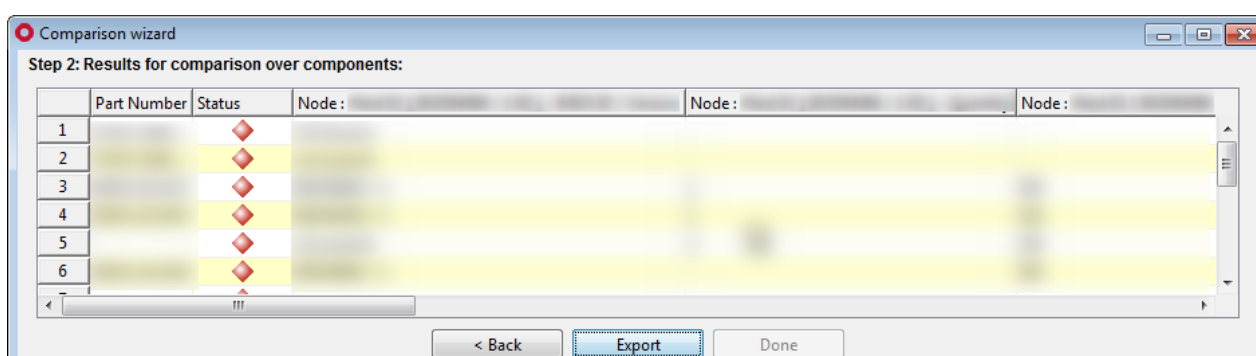


Figure 255 Comparison wizard – Step 2 – Sample result

The results can be then export by using the “**Export**” button.

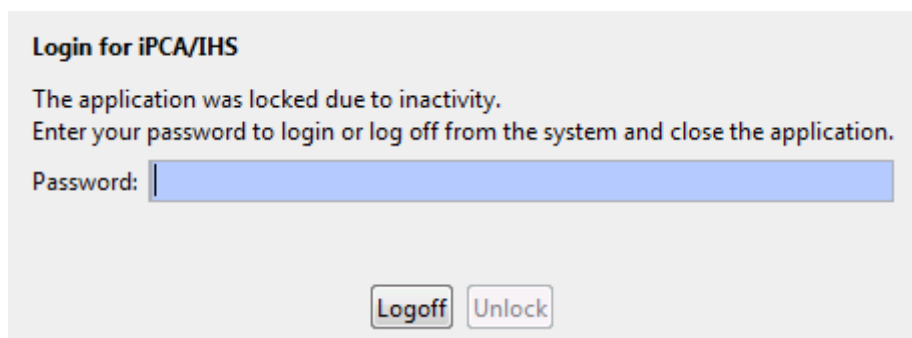
31 Automatic user logout (optional)

This optional module allows automatic logout of the iPCA user session after defined minutes of inactivity set in the configuration parameter “**AUTO_LOGOUT_TIME**”.

Then the iPCA application panel is anonymized and the (re)login dialogue is displayed.

To relogin, enter the password and click on the “**Unlock**” button.

To close iPCA, click on the “**Logoff**” button.



The screenshot shows a login dialog box titled "Login for iPCA/IHS". The text inside reads: "The application was locked due to inactivity. Enter your password to login or log off from the system and close the application." Below this text is a password input field labeled "Password:". At the bottom of the dialog, there are two buttons: "Logoff" and "Unlock".

Figure 256 Panel displayed after user's inactivity in iPCA

32 Personalization

32.1 Changing the search results tables

32.1.1 Overview

Using this feature, the user can change the displayed columns for the search result table, and also change their order.

All changes can be stored.

The user can create multiple different configurations; these can all be stored and retrieved as required.

All the functions can be actioned by selecting with the right mouse button the header of a column (blue mark in figure below) or the table header (red mark in figure below).

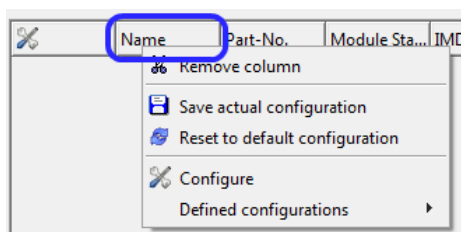


Figure 257 Context menu for a column header

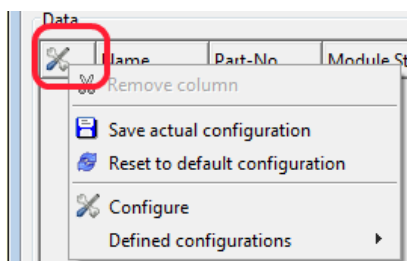


Figure 258 Context menu for a table header

The following actions are available

- **Remove column**
Remove the selected column from result table
- **Save actual configuration**
A pop up will open to save the table configuration

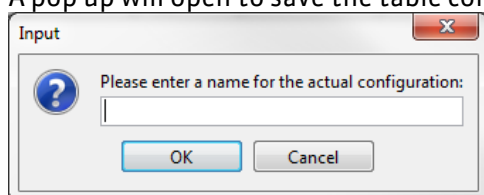


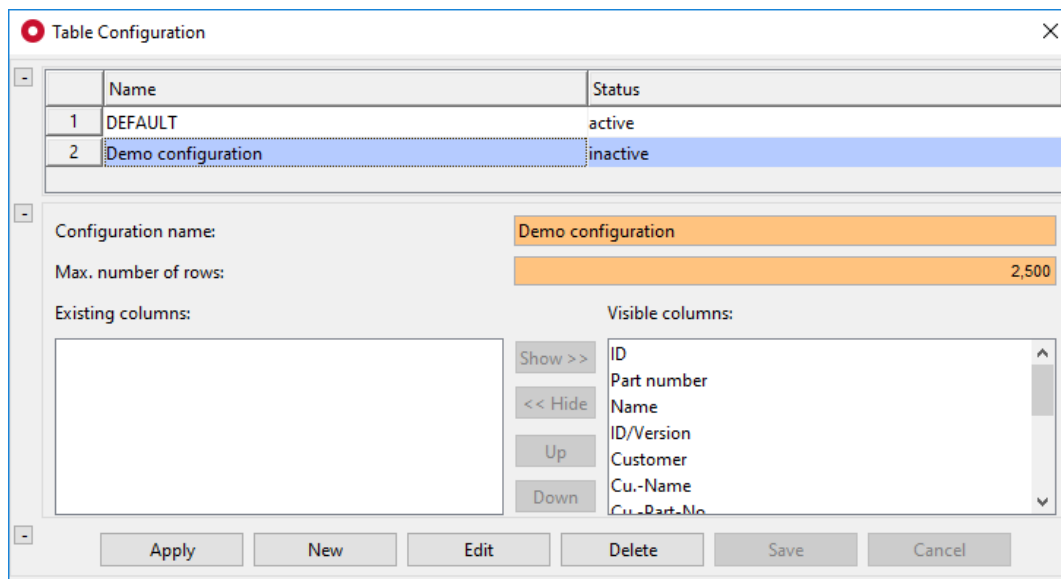
Figure 259 Add file name

Add a name and select “OK” to save the actual configuration, or select cancel to cancel the configuration changes.

- **Reset to default configuration**
The result table layout will be reset to standard layout
- **Configure**
Opens a dialogue window to configure the layout of the result table.
For further details please see chapter 32.1.2 “Configuration screen”
- **Defined configurations**
Selecting this option, the user can see all the saved configurations and activate them by clicking on it.
This option is only available, if there is a saved configuration available for this results table.

32.1.2 Configuration screen

The layout of a result table can also be configured using the layout dialog.



The dialog box titled "Table Configuration" contains the following elements:

- A table with columns "Name" and "Status":

	Name	Status
1	DEFAULT	active
2	Demo configuration	inactive
- Configuration name: Demo configuration
- Max. number of rows: 2,500
- Existing columns: (empty list)
- Visible columns:
 - ID
 - Part number
 - Name
 - ID/Version
 - Customer
 - Cu.-Name
 - Cu.-Part-No
- Buttons: Show >>, << Hide, Up, Down, Apply, New, Edit, Delete, Save, Cancel

Figure 260 Configuration dialog for search result lists

This screen is divided into different sections:

- **Available configurations**
This section displays the saved configurations for the selected results table.
When selecting an entry, the table configuration section will display which columns are configured and the order of the columns.
- **Name of selected configuration**
When creating a new configuration, the name of the configuration must be entered here before saving.

- **Max result size**

With this option, the user can change the maximum amount of row to shown within the search results.

The company default value can be set and modified by a user with administration privileges.

- **Column definition area**

This section is used to configure and order the columns displayed for a specific configuration. The left box “Existing columns” will list all the columns available for this result list.

The right box “visible columns” shows the selected columns in the defined order for this configuration.

By using the forward/Back arrows between these boxes, the configuration can be changed:

- **Show >>**

Add a selected available column to the configuration

- **<< hide**

Remove a selected column from the visible list

- **Up**

Move a selected visible column up, to reposition the column order

- **Down**

Move a selected visible column down, to reposition the column order

- **Actions**

The following actions are available

- **Apply**

Activate the selected configuration and close dialogue box.

- **New**

Create a new configuration

- **Edit**

Change a previous created configuration

This action is not available for the default configuration

- **Delete**

Delete a previously created configuration

This action is not available for the default configuration

- **Save**

Save the changes following the editing or creation of a new configuration

- **Cancel**

Cancel editing or creation of a new configuration, without saving

33 Administration

33.1 General

The following functions can be maintained depending on user privileges:

- Maintain user and roles
- Maintain the application

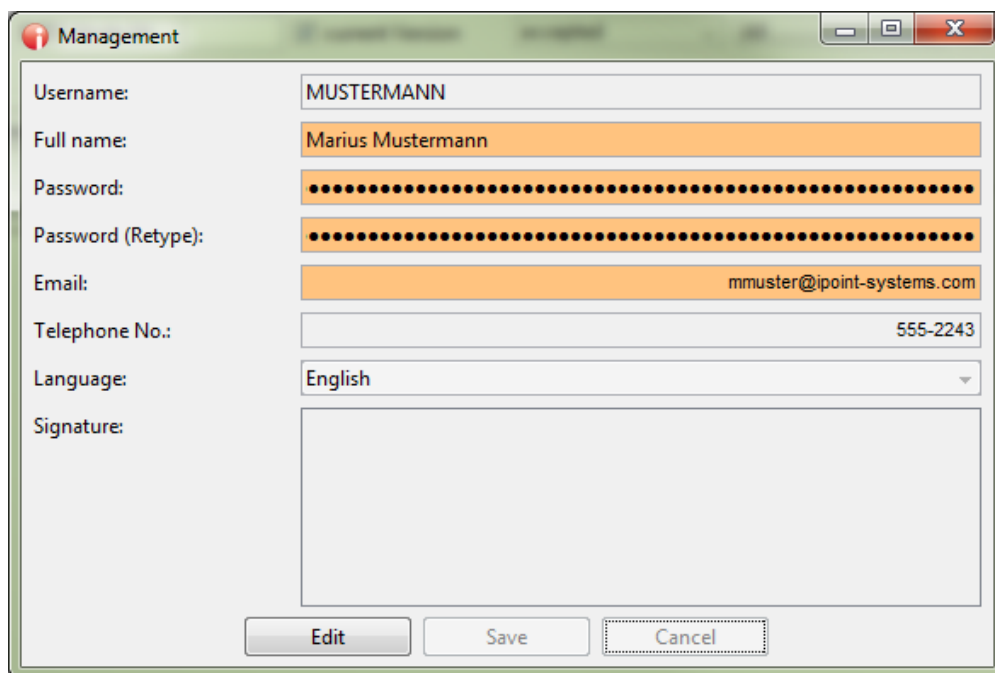
Using having the privilege “Administration” can start the maintenance functions using that entry.

Details can be found in the manual “User Management”

Users having not that privilege can use this entry to manage their own data.

33.2 Changing your own data

A user without the user privilege to the user management is only allowed to change his own data using below panel.



The image shows a 'Management' window with the following fields and values:

Field	Value
Username:	MUSTERMANN
Full name:	Marius Mustermann
Password:	
Password (Retype):	
Email:	mmuster@ipoint-systems.com
Telephone No.:	555-2243
Language:	English
Signature:	

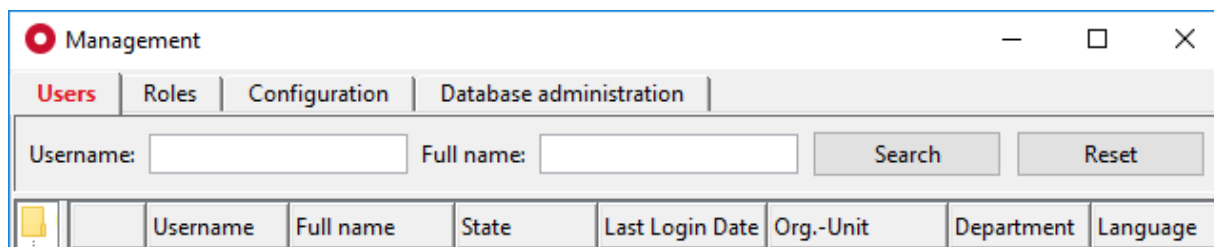
Buttons at the bottom: Edit, Save, Cancel

Figure 261 Change user data

To change the data, select “Edit” first. To save the changes, select “Save” before closing the window. Select “Cancel” to close the window without saving the changes.

33.3 Administrating the application

Users with administration privileges can use the tab “**Configuration**” in the Management screen to change customer configuration parameters for the application.



The screenshot shows a web application window titled "Management". It has four tabs: "Users", "Roles", "Configuration" (which is selected), and "Database administration". Below the tabs, there are search fields for "Username:" and "Full name:", followed by "Search" and "Reset" buttons. At the bottom, there is a table with the following headers: Username, Full name, State, Last Login Date, Org.-Unit, Department, and Language.

Figure 262 Management options

There are three levels of parameter: company specific, organization unit specific and user specific.

Details regarding how to use the administration panels will be covered during the administrators training sessions.

The table below lists selected configuration parameters:

Configuration parameter	Description	Allowed values
FETCH_SIZE_RECEIVED_SEARCH	Controls the maximum size of the result list when searching for received MDS and the associated reports	0 = Standard limit of 2500 lines -1 = No limit x = the list will contain a maximum of x lines
FETCH_SIZE_SENT_SEARCH	Controls the maximum size of the result list when searching for sent MDS's and the associated reports	Same as FETCH_SIZE_RECEIVED_SEARCH
FETCH_SIZE_STANDARD_SEARCH	Controls the maximum size of the result list when searching for components, semicomponents, materials or all MDS/modules	Same as FETCH_SIZE_RECEIVED_SEARCH
FILTER_PSEUDOCOMPANIES_4STANDARD_SEARCH	MDS's from IMDS Committee companies will be listed first in the search results list	true / false



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Configuration parameter	Description	Allowed values
FRAME_CALCULATION_USING_PIXEL	Controls the window size calculation is using Pixel or percentage values	true / false
FRAME_WIDTH_IN_PIXEL	Size of window width in pixel	Pixel (Default: 942)
FRAME_HEIGHT_IN_PIXEL	Size of window height in pixel	Pixel (Default: 621)
FRAME_WIDTH_IN_PERCENT	Size of window width in percent	Percent (Default: 95.0)
FRAME_HEIGHT_IN_PERCENT	Size of window height in percent	Percent (Default: 90.0)
FULL_EXPORT_MODULE	Allow the complete results list to be exported	true / false
LCM_SEARCH_DEFAULT_INCOMPLETE_ONLY	Default value for the search criteria “Only incomplete” in the search mask in the “LCM” tab	true = Checkbox selected false = no selection
Q_CHECK_NODECOUNT	Number of nodes when the question window should appear, for selecting which checks will be used for the Q-checker	Any positive integer Default 5000
MDS_SPM_OPEN_REQUEST_CHECK	Defines what type of nodes in the opened datasheet are considered for lookup to determine if an open SPM request(s) exist	MDS (node of datasheet type is considered) MODULE (node of module type is considered) SN (node of simple node type is considered) MP (node of missing position type is considered) Values can be combined and separated by ; sign
RESTRUCTURE_ALLOWED	Function to automatically restructure the generated tree structure during the PDM BoM import	true / false
SEARCH_SENT_RECEIVED_BEGIN_DATE	Days back from the actual date to be used as “date from” within the search for received or sent MDS’s	Any positive integer
SEARCH_PRE_CHECK	Enable/Disable the displaying of a message, if a search should be processed without input of any search criteria	true / false
SPM_SEARCH_DEFAULT_INCOMPLETE_ONLY	Default value for the search criteria “Only incomplete” in the search mask in the “SPM” tab	true = Checkbox selected false = no selection
VANALYZE_LOADMAT	Usage List, search for basic substances:	Any positive integer, default = 5000,



iPCA

Configuration parameter	Description	Allowed values
	if this value is greater than the number of MDS/modules which are searched for, the basic substances are searched within the tree bottom up, otherwise the tree is searched top down	can be missing
VANALYZE_MAXANZ	Usage List: maximum row count for the results list; if there are more results, new data can be searched for by clicking <Pg-Down> if the last row is selected.	Any positive integer, default = 25000
VANALYZE_OLD_USAGE_AND_PATH	Usage List: controls the processing of the analysis and the path list: 0 or missing = new VWN, display of the path top down; 1 = new VWN, path displaying bottom up 2 = old VWN, path displaying bottom up	Any positive integer, can be missing, then 0 is used.
VANALYZE_SEARCHIN_MAXROWS	Usage List: Amount of selected entries that are searched for to start the process synchronously; if this value is exceeded a background process will be started	Any positive integer, default = 50000
VANALYZE_TMP_INMEMORY	Usage List: controls the processing if the results are temporarily stored on the servers' memory or by a database helper table.	True / false, true = faster processing but requires more memory for the database!
UPLOAD_EMAIL_HEADER UPLOAD_EMAIL_FOOTER	Header and footer used for the email when notifying an upload to the related user	Any text

Table 14 List of selected iPCA configuration parameters

33.3.1 Standard colour scheme

The iPCA Client is delivered with a standard colour scheme; this can be changed by a system administrator (see chapter 33.3). The colours are declared in RGB values¹.

The configuration parameters, with their predefined colours are listed in the table below.

Configuration parameter	Description	Standard value RGB
TEXT_BACKGROUND_FOCUS	Background colour for active GUI elements	181,203,255
TEXT_BACKGROUND_MANDATORY	Background colour for GUI elements which are mandatory	255,195,127
TEXT_BACKGROUND_MANDATORY_FOCUS	Background colour for active GUI elements which are mandatory	255,255,117
TEXT_BACKGROUND_MANDATORY_INACTIVE	Background colour for inactive GUI elements which are mandatory	255,195,127
TEXT_FOREGROUND_FOCUS	Text colour in active GUI elements	0,0,0
TEXT_FOREGROUND_MANDATORY_FOCUS	Text colour in active GUI elements	0,0,0

Table 15 List of iPCA configuration parameters for a colour scheme

33.3.2 Configuration of the application's date and time formats

The iPCA Client is delivered with a standard formatting for date/time input fields or displayed columns in the search result lists (date as dd.mm.yyyy respectively yyyy/mm/dd).

To display the date/time format according to ISO 8601 or language specific, the following configuration parameters PATTERN_<xxx>_<ISO/LANG> are available.

The ISO format PATTERN_<xxx>_ISO will automatically be applied to all languages. But it is possible to overwrite this definition for specific languages, by defining a corresponding language specific parameter PATTERN_<xxx>_LANG.

¹ Examples of RGB color values, can be found at <http://rgbchart.com/>



Configuration parameter	Description	Examples
PATTERN_DATE_ISO	Definition of the date format according to ISO 8601. If it is set, then the parameter for ShortDate has to also be set!	yyyy-MM-dd yyyyMMdd
PATTERN_DATE_<LANG>	Definition of the date format for a specific language. The parameter has to be defined separately for each language, e.g. German: PATTERN_DATE_DE, for English: PATTERN_DATE_EN. Valid languages are: DE, EN, FR, ES, CN. If it is set, then the parameter for ShortDate has also to be set!	For EN: dd/MM/yyyy
PATTERN_SHORTDATE_ISO	Definition of a shortened date format according to ISO 8601 with only a 2-digit year.	yyMMdd yy-MM-dd
PATTERN_SHORTDATE_<LANG>	Definition of a shortened date format with only a 2-digit year format for a specific language, please refer also to the description of PATTERN_DATE_<LANG>	dd/MM/yy
PATTERN_TIME_ISO	Definition of the time format according to ISO 8601. ISO is always using the 24h time system.	HHmmss HH:mm:ss
PATTERN_TIME_<LANG>	Definition of the time for a specific language. please refer also to the description of PATTERN_DATE_<LANG>	hh:mm a
PATTERN_DATETIME_ISO	Definition of the combined date-time-format according to ISO 8601.	yyyyMMddHHmmss yyyy-MM-dd'T'HH:mm:ss yyyy-MM-dd HH:mm:ss
PATTERN_DATETIME_<LANG>	Definition of the combined date-time-format for a specific language., please refer also to the description of PATTERN_DATE_<LANG>	dd/MM/yyyy hh:mm a

Table 16 List of iPCA configuration parameters for a date and time format



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Following format characters are allowed:

- d = Day
- M = Month
- y = year
- h = hour (1-12)
- H = hour in 24h format (1-23)
- m = Minute
- s = Second
- a = Marking of am/pm
- Additionally Characters have to be marked with apostrophe ('), e.g. for Date time ..dd'T'HH... for marking the time.

To simplify the input for the user, the ISO parameters are already predefined as **PATTERN_<XXX>_ISO_DEFAULT**. If the ISO formats are activated, the user has only to delete the ending from the key and correct the value according to their needs.

34 RRR and LCA calculation (Optional)

Within the RRR tab, the RRR and LCA calculations for an MDS are managed. In this tab, the following functions can be executed:

- Preparing a new calculation
- Starting a calculation
- Showing reports of saved calculations
- Deleting calculations

To activate the RRR tab, the top node of the MDS has to be selected and the “Activate/show RRR” icon must be clicked.

The calculations for the MDS will be displayed in a list. The list contains the following fields:

- **State**
State of the data preparation
- **Model Id**
Id of the data preparation
- **Creation date**
Date and time of the creation of the data preparation (YYYY/MM/DD hh:mm:ss)
- **Creator**
Name of the creator of the data preparation
- **Last change**
Date and time of the last change of the data preparation (YYYY/MM/DD hh:mm:ss)
- **Last editor**
Name of the last editor of the data preparation
- **Analysis**
Name of the analysis
- **Reuse**
Share [%] of reusable material
- **Recycling**
Share [%] of recyclable material
- **Feedstock recycling**
Share [%] of feedstock recyclable material
- **Recovery**
Share [%] of recoverable material
- **Disposal**
Share [%] of disposal material
- **Hazardous disposal**
Share [%] of hazardous disposal material



- **m_P**
mass of material considered at the pre-treatment step
- **m_D**
mass of material considered at the dismantling step
- **m_M**
mass of material considered at the metal separation step
- **m_{Tr}**
mass of material considered at the non-metallic residue treatment step and which can be considered as recyclable
- **m_{Te}**
mass of material considered at the non-metallic residue treatment step and which can be considered for energy recovery
- **m_v**
mass of material considered at the disposal

Each line in the list will have the following values for the column “state”

- “Ready for RRR”: A new data preparation. Calculation can be started by clicking the “Start RRR analysis” button.
- “RRR analyzed” with a saved product model
- “RRR analyzed” with saved results

The following functions are available:

- **Start RRR analysis**
To start an RRR analysis, select a line in the list and click on start RRR analysis. If the state is “ready for RRR” a new RRR Product Model Conversion Wizard opens. Otherwise, the already converted product model will be opened.
- **Show reports**
If reports have been uploaded from the RRR module they can be seen by clicking the “Show Reports” button
- **New data preparation**
Define a new RRR calculation by clicking “New data preparation”. A preparation line will be defined in the table, showing the state Ready for RRR
- **Delete**
To delete a conversion with all its reports and calculated results, click “Delete”

Workflow to start an RRR/LCA Calculation

- Open the RRR tab – Select the top node of the open MDS, then select the RRR button
- Define a new RRR calculation by clicking “New data preparation”. A preparation line will be defined in the list, with the state Ready for RRR



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- To start a RRR analysis, select a line and click on “Start RRR analysis”
 - If the state is ready for RRR a new RRR Product Model Conversion Wizard opens
 - If not, the already converted product model will be opened
- If the calculation results were saved from the RRR module, they are shown as new lines in the table.
 - When stored, the results are shown as an extra line in the iPCA RRR view. The line includes a Model Id and an analysis name to enable a unique identification.
- If reports have been uploaded from the RRR module they can be seen by clicking the Show Reports button.
- To delete a conversion with all its reports and calculated results, click delete



35 Glossary

Term	Explanation
MDS	An MDS is a Material Data Sheet which is created by a company and sent to other companies or that is published to all users of IMDS in order to be used in their Material Data Sheets. It contains information about the ingredients as well as supplier- and recipient data
Module	A module is similar to an MDS but it is exclusively for internal use. Modules cannot be sent or published and therefore contain no other data than ingredients. If a component or a semi-component is often used in other products, a module can be created as a 'construction kit' and can be often re-used in the structure tree of other modules/MDS. Therefore, modules are always available as reference and don't have to be created again. Materials are always created at least as modules.
Simple node	If a component or semi-component is added to the structure tree, it is only available in this MDS/module. The item is then called a 'simple node'. Simple nodes are only visible in that MDS/module in which they were created. They aren't visible in the summary lists, this means they cannot be re-used in other MDS/modules. The symbol for a simple node does not contain a black dot.
Component 	A component can be an assembly or a simple component of another component. A component can contain any of the structure types of IMDS, except substances. A special type of a component is the Flat bill  . For information about creation and handling of flat bills, please refer to the Flat bill documentation.
Semi component 	A semi-component is a product that has at least one more step in the processing chain to become a component, i.e. a cable or a plastic foil. Its weight can only be given when it is added to the structure tree. What is defined as a semi-component or as a material (i.e. colours, glues, fats etc...) this should be agreed between the supplier and the recipient of the MDS. Underneath a semi-component, only other semi-component or materials can be added to the structure tree.
Material 	A material is the basis of each component or semi-component (plastics, metals, etc...) and consists of other material or basic substances. A material must consist of at least one basic substance.



Term	Explanation
Basic Substance ▲	Basic substances are the main substances which are included in a component or semi-component. They are chemical elements or chemical compounds as they naturally occur or are produced. They have to be added to a material and are solely created by the CXD-Service-Team. If there are underneath a component or semi-component basic substances integrated, then these are old MDS/modules that have been entered during the starting period of IMDS. This creation of an MDS/module is not allowed any longer, and will be declined when checking the structure. Therefore, these MDS/modules have to be exchanged in your own created MDS/modules.
Missing Position	A missing position is where a component/semicomponent/material that was not found during the load of a BoM (CSV, PDM/ERP/SAP interface). A missing position is therefore documenting a BoM line with a missing MDS/module. A missing position will always be shown as a component (simple node).



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38 Change History

Version	Date	Description
8.00	21.12.010	Changes for Rel.8 Cancel standard searches (optional) – see chapter 7.1 New, improved standard colour scheme – see chapter 0 New application parameter – see chapter 33.3 Updated personalization – see chapter 32.1
8.00	25.01.2011	Added missing changes in chapter 21.2 and chapter 21.3
8.02	25.01.2011	Changes in chapter 25.2 and 25.3
8.03	03.02.2011	Detail analysis within Usage list for all node types
8.05.005	18.03.2011	Added tab Documentation; added minor extension within the chapter “Car model”
8.06 / 8.03.007	10.04.2011	Added manually creating of a “Car model”
8.06	19.05.2011	Added information about GMIR Status
8.06	01.06.2011	Added information for RRR and LCA
8.06	22.06.2011	Updated information for RRR and LCA
8.06	27.06.2011	Added hint for ZVEI-Rec019 company Added chapter 5.6
8.06	05.07.2011	Added explanation for component weight check in chapter 27
8.06	21. 07.2011	Added note about Car Model selection in chapter 14.1.4 Fixed typo HIS / IHS
8.07	01.08.2011	Changed Editing of added application codes (chapter 9.4.2.8.1)
8.08	22.08.2011	Added scheduling to usage list background processes in chapter 14.1.4
8.08	25.08.2011	Added details about substance groups to chapter 14.1.3
8.09	15.10.2011	Added new permission JOB_RESULT in chapter 21.3
8.11	15.12.2011	Added optional extension “Blacklist” - see chapter 9.3.2, 25.2 and 27
8.13	26.04.2012	Changed texts of optional extension “Blacklist” - see chapter 9.3.2 and 27
8.15	01.06.2012	Improved master data and added “Regions and Organisations”
8.15	25.06.2012	Added “iFlow Parameter” – see chapter 5.4
9.00	15.10.2012	Changes for Rel.9
	30.10.2012	Added Password Security Parameter - see chapter 6.4 Updated screenshot in chapter 33.2
	16.11.2012	Added Recently Opened feature – see chapter 6.1
	23.11.2012	Added optional module MNS – see chapter 28
9.03	15.01.2013	Added additional options for tree loading – see chap. 17.2



Version	Date	Description
9.04	04.04.2013	Multiple extensions
	05.04.2013	Added User Deactivation Parameter - see chapter 6.4
10.0	04.04. 2014	Added "Forward MDS" in context menu in opened MDS Added additional attributes tabs for OEMs for IMDS Release 9 Added checkbox "All GADSL substances are declared" for a material Further minor improvements
10.0	04.02.2016	Migration of the manual to the next user manual style
12.00	29.06.2016	Added columns "Weight" and "Unit of measure" to the result list in below search panels: ○ Received ○ Sent ○ Component Added support for obsolete IMDS feature to the Deactivation module Added "Sunset date" and "Last application" date to the details of the basic substance Added possibility to define the name of the usage analysis DB job Support of up to 50 supplier codes in supplier code search criteria in search masks across the application Forwarding of material MDSs is allowed again The "I have declared all GADSL substances" checkbox is removed The "Preliminary MDS" checkbox is displayed for all component/semicomponent/material nodes in the MDS tree "IHS comment" moved from "IHS" tab to "IMDS -> Ingredients" tab Added possibility to replace a simple node with the MDS/module Added possibility to insert standard reason for denial header to the reason for denial field if SCM/USC/AIC check of the received MDS found no issue Added possibility to add a signature to the reason for denial uploaded to IMDS online system on rejection of the received MDS Detailed MDS tree load available only in the direct mode Addition of the search mask into the Project master data panel Extended search criteria in supplier/company search panel Many other changes and improvements Updated Figure 94 and improved descriptions (chapter 12.2) Updated Figure 95 and improved descriptions (chapter 12.3) Updated Figure 96 and improved descriptions (chapter 12.4)
12.01	14.10.2016	Updated description for "Delete" button (chapter 7.4.4) Improved name of the DB job for export of all data from search result list (chapter 7.4.4) Improved text (chapter 21.1) Improved text (chapter 21.2)



Version	Date	Description
		Improved text and updated Figure 172 and Figure 175 (chapter 21.3)
12.03	11.11.2016	Added result lists and improved text (chapter 14.1.5.1) Updated text based on the changed order and labels of columns in the result from usage analysis for basic substances done in the iPCA client (chapter 14.1.5.2) Added result lists and improved text (chapter 14.1.5.3) Improved text (chapter 14.1.6)
12.10	23.03.2017	Changed default search for substance state in step 2 of usage analysis for basic substances wizard (chapter 14.1.3.1) Added precision for “save result” option (chapter 14.1.4) Updated Figure 215 (chapter 23.1) Updated Figure 216 (chapter 23.4)
12.11	07.04.2017	Added MDS bulk transfer (optional) option (chapter 6.3) Added new chapter for MDS bulk transfer (optional) (chapter 29)
12.12	28.04.2017	Added missing options for search in tree and added precision for application code search (chapter 9.3.1)
12.15	24.05.2017	Removed LookAndFeel from iPCA (chapter 6.5)
12.16	21.06.2017	Renamed Supplier Contact Data Import (chapter 6.3) Updated Figure 25 (chapter 6.7) Added details about contact priority flag (optional) (chapter 23.1.3.2.3)
12.17	29.06.2017	Extended description for delete button based on implemented possibility to delete SPM request for missing position located under the simple node being deleted from the MDS tree (chapter 9.3.1) Updated Figure 105 (chapter 14.1.3.1)
12.18	10.07.2017	Added new chapter for bulk deactivation of IMDS datasheets (optional) (chapter 20.5) Added chapter for companies & contacts exports (optional) (chapter 23.1.3.4)
12.24	29.09.2017	Improved and changed description for “New version” button (chapter 7.4.4) Improved and changed description for “New version of an MDS/module” option in the context menu (chapter 9.3.2) Updates and text improvements (chapter 23.1)
13.00	15.12.2017	Added description for panel displayed on click on the “X” button in the main application window (chapter 5.1) Added option “Change application language” and improved text for remaining options (chapter 6.1) Updated description for “Set flexible version” context menu option (chapter 9.3.2)



Version	Date	Description
		Added Figure 76 and description about visualization of the fact that the defined contact person is inactive/deleted (chapter 9.5) Added description about button “Compare” (chapter 10.3) Reworked chapter 21 to reflect improvements and changes in the DB Job Manager panel Added chapter 23.6 to describe CSI Due Dates master data panel Added new events for LCM requests (chapter 24.4) Added check verifying if the selected method of submission is allowed for selected customer or not (chapter 29.3)
13.02	19.01.2018	Removed reference to the compare function for car models in - chapter 25.3 - chapter 30 - chapter 30.1 Updated Figure 254 (chapter 30.2)
13.03	30.01.2018	Added chapter 23.2
13.04	08.03.2018	Added check that do not allow deletion of an MDS/Module if a new version (/999.xx) exists for the MDS/Module in iPCA (to avoid AI upload error) (chapter 7.4.4) Minor improvements in chapter 21.1 Added chapter 23.2 Reworked chapter 24
13.05	08.03.2018	Changes based on the GDPR regulation Added information about deletion of few attributes on inactivation of the iPCA user account (chapter 6.4)
13.06	29.03.2018	Changes based on the GDPR regulation - Added detail about new checkbox confirming storage of the user data (chapter 6.4) - Added note that a new permission “SENT_INCLUDE_CONTACT_DETAILS” is needed for the display of contact details ‘Sent’ panel (chapter 10.2) - Added note that a new permission “RECEIVED_INCLUDE_CONTACT_DETAILS” is needed for the display of contact details ‘Received’ panel (chapter 10.3) - Updated Figure 196 (chapter 23.1.3.2.3) - Added details about four new columns in the result list (chapter 23.1.3.2.3.2) - Added detail about new checkbox confirming storage of the user data (chapter 23.1.3.2.3.4.1) - Added detail about new checkbox confirming storage of the user data (chapter 23.1.3.2.3.4.2) - Added information about deletion of few attributes on logical deletion of the HIS contact (chapter 23.1.3.2.3.4.3)



Version	Date	Description
		Added two new upload states for Chemistry Manager to the upload information (chapter 12.2)
13.08	13.04.2018	Updated text based on the changed order and labels of columns as well as addition new columns in the result from usage analysis for basic substances done via the DB job (chapter 14.1.5.2)
13.09	26.04.2018	Added two new upload types for Chemistry Manager to the upload information history (chapter 12.3) Removed LCM events "New GMIR request" and "New Powerway request" (chapter 24.4)
13.14	08.06.2018	Update based on the improved behaviour of the automatic user logout feature (chapter 31)
13.19	10.08.2018	Changed wording for "Supplier Contact Data Import" (chapter 6.3) Updated Figure 196 (chapter 23.1.3.2.3) Changed wording for GDPR (chapter 23.1.3.2.3.4.1) Changed wording for GDPR (chapter 23.1.3.2.3.4.2)
13.22	21.09.2018	Updated text based on the changed order and labels of columns as well as addition new columns in the result from usage analysis for application codes done via the iPCA client and via the DB job (chapter 14.1.5.3) Reworked chapter 15 Added new event for LCM requests (chapter 24.3.1.1) Added new event for SPM requests (chapter 24.3.1.2) Added information about addition attributes in the email header for LCM and SPM notifications (chapter 24.3.2)
14.00	01.03.2019	Updated Figure 72 and Figure 73 and slightly improved the text (chapter 9.4.2.8.1) Updated Figure 74 and improved the text (chapter 9.4.2.8.2) Updated Figure 77 (chapter 9.6)