



iPoint

iPCA

LCM

V14.03 onwards

iPCA

LCM

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Imprint

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Table of Contents

1	INTRODUCTION.....	5
1.1	General.....	5
2	SUPPORT	6
3	NEW FUNCTIONS	7
4	BASIC TERMS	8
4.1	Short description.....	8
4.2	Abstract.....	8
5	LCM REQUEST	9
5.1	Ways to create LCM request	9
5.2	Create new LCM request.....	9
5.2.1	LCM request.....	9
5.2.2	LCM documents.....	12
5.2.3	LCM contacts.....	14
5.2.4	Finishing LCM request creation.....	17
6	LCM TAB.....	18
6.1	Search mask.....	18
6.2	Result list	21
6.3	Buttons	25
6.3.1	Edit / Show.....	25
6.3.2	History	28
6.3.3	Copy	29
6.3.4	Delete.....	30
6.3.5	MDS Details.....	31
6.3.6	Assign MDS	31
6.3.7	Reject Online Request.....	32
6.3.8	Update Online Request.....	33
7	LCM CONFIGURATION AND MASTER DATA	35
7.1	LCM Parameter	35
7.2	Projects Master Data	36
7.2.1	Search mask.....	37



7.2.2	Result list.....	37
7.2.3	Project details	37
7.2.4	Actions	37
7.3	Plants Master Data	40
7.3.1	Overview of plants	40
7.3.2	Plant details	41
7.3.3	Actions	41
8	TABLE OF TABLES.....	44
9	TABLE OF FIGURES.....	45
10	CHANGE HISTORY	46

1 Introduction

1.1 General

This document describes the functionality of the iPCA module LCM (iPoint Compliance Agent – Life Cycle Management).

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

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

Some functions are only available with specific rights owned by the login user. If a required functionality is not available for you, please contact your internal administrator.

2 Support

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

This administrator will check and answer your enquiry.

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

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



3 New functions

Version	Description
14.03	Result list extended with remaining recipient data and some extra attributes
14.01	Added "Remark" as a new search criterion
13.28	Field "Supplier Site Code" changed to read-only in case the customer is Volvo Car Corporation (106)
13.00	Request contact assignment module is now available to all LCM customers Search criteria "from Org.unit" in "LCM" tab in the main search panel changed from text field to list box to allow to search for LCM requests assigned to different organization units at the same time
12.00	Added possibility to delete LCM request
9.00	Integration of the optional module „Multi Number Support“
8.01	New tab "Documentation" for the edit window
7.5	Configurable default value for search criterion "Only incomplete"
6.0	New search criteria: ID, Requestor and IMDS contact person
5.01.006	Project specific email-address for escalation Support of MDS requests from the Ford GMIR portal (optional)
5.1	New symbols for easier recognition of the different statuses Availability of the full functionality in iPCA/IHS Now update of recipient data is allowed even with an associated MDS
4.05.004	Support for company internal requests Additional search criteria Extended search result list Status update by manual MDS assignment Flowchart supplemented
4.01.001	Complete new user administration (see own documentation) Support for IMDS Online requests

4 Basic terms

4.1 Short description

LCM is an optional module for acquisition and monitoring of MDS requests.

Each request is automatically monitored and its current state is displayed.

Every milestone in the lifecycle of the request is documented.

4.2 Abstract

Information about the used terms and symbols can be found in the documentation of iPCA/IHS.

5 LCM request

5.1 Ways to create LCM request

New LCM request can be created:

- By navigation to the menu “**File → New → Create LCM request**” (see **chapter 5.2**)
- By click on the icon  in the icon bar (see **chapter 5.2**)

5.2 Create new LCM request

5.2.1 LCM request

An empty form for LCM request creation is opened (see **Figure 1**).

PLEASE NOTE: Only user with activated permission “**LM**” can create new LCM request.

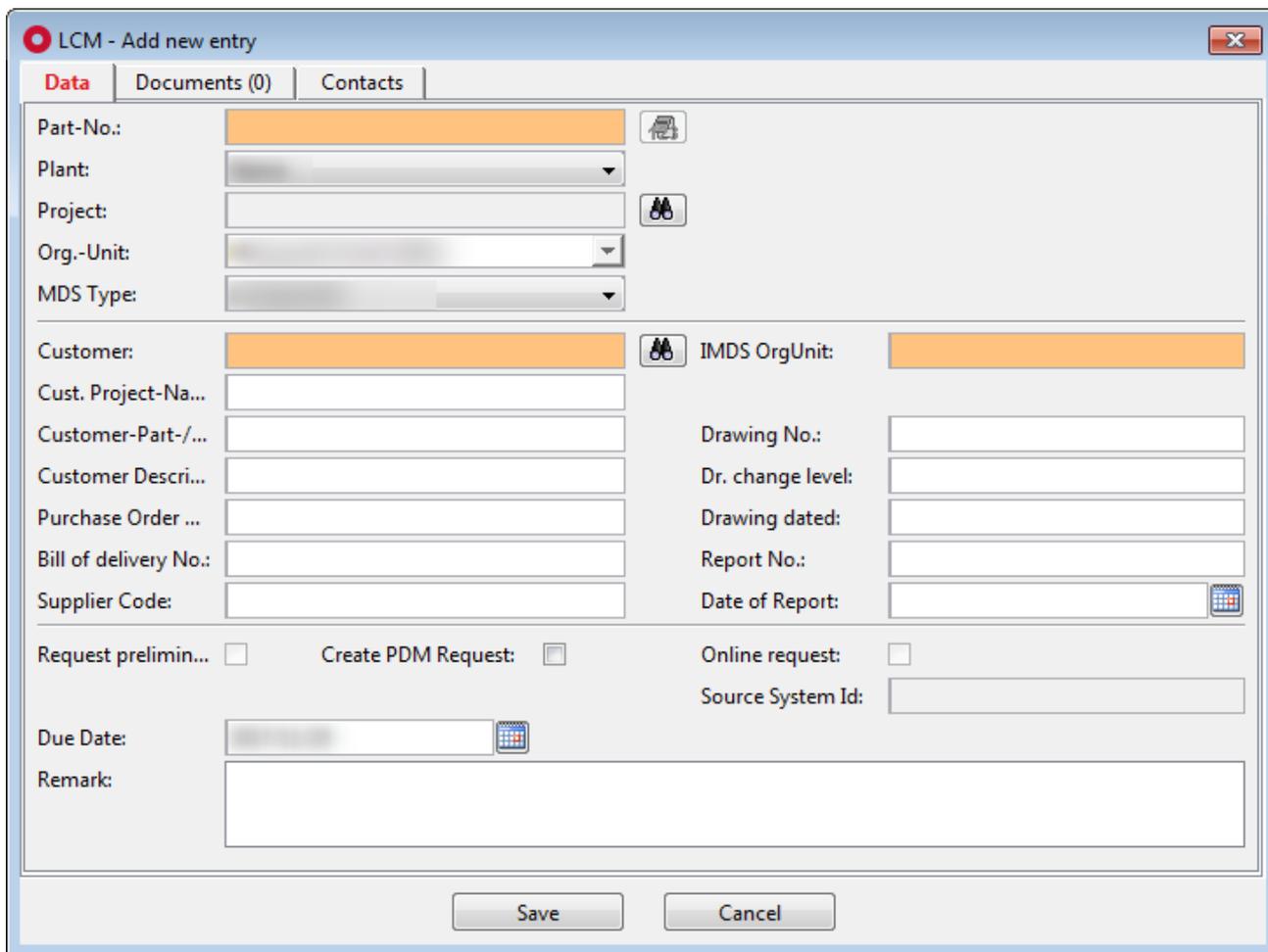


Figure 1 Create new LCM request



Following information must/could be defined:

- **Part-No.**
Own part number of the item, for which the LCM request will be created.
- **Multi numbers**
Multiple part numbers of the items applicable for the LCM request which will be created.
The button is inactive until the first save of the LCM request. Upon save of the LCM request, the button becomes active and multiple numbers can be defined.
- **Plant**
Manufacturing plant of the item, for which the LCM request will be created.
Plant can be chosen from the drop-down list.
Plants are managed in the “Plants” master data (see **chapter 7.3**).
- **Project**
The project linked to the item, for which the LCM request will be created.
Project can be chosen using the  button, which will load standard project search window.
Wished project can be then confirmed by click on the “**Apply**” button.
Projects are managed in the “**Projects**” master data (see **chapter 7.2**).
- **Org.-Unit**
Own organization unit, which is requested to create MDS for an item requested in the LCM request.
Required organization unit can be chosen from the drop-down list containing all own and active IMDS organization units.
- **MDS Type**
Type of the MDS requested to be send for an item, for which the LCM request will be created.
MDS type can be chosen from the drop-down list containing following values:
 - Component
 - Semi Component
 - Material
- **Customer**
Name of the IMDS company, for which the MDS should be created and submitted.
The customer can be defined by click on the  button, which will load standard company search window. Wished customer can be then confirmed by click on the “**Apply**” button.
- **IMDS OrgUnit**
IMDS company ID populated upon selection of the customer.
This field is read-only and cannot be modified by the user.
- **Cust. Project-Name**
Customer name of the project (according to the requests received from the online system).
- **Customer-Part-/Item-/Mat.-No.**
Customer number of the item, for which the LCM request will be created.

- **Drawing No.**
The drawing number of the item, for which the LCM request will be created.
- **Customer Description**
Customer name of the item, for which the LCM request will be created.
- **Dr. change level**
The change level of the drawing of the item, for which the LCM request will be created.
- **Purchase Order No.**
The purchase order number of the item, for which the LCM request will be created.
- **Drawing dated**
The date of the drawing of the item, for which the LCM request will be created.
- **Bill of delivery No.**
Bill of delivery number of the item, for which the LCM request will be created.
- **Report No.**
The number of the sample report of the item, for which the LCM request will be created.
- **Supplier Code**
The supplier code of the own company at the customer side.
PLEASE NOTE: Some customers have special requirements on this, e.g. DUNS number.
- **Date of Report**
The date of the sample report of the item, for which the LCM request will be created.
This can be defined either by manual definition of the date in the field or by using  button and selecting the date from the calendar shown.
- **Request preliminary**
Information whether the preliminary MDS needs to be created for an item, for which the LCM request will be created.
- **Create PDM Request (optional)**
If this checkbox is checked, an export of the request will be sent to the PDM system.
This functionality is optional and is available only if “ERP/PP-Two-Way-Connector” or “SAP-Two-Way-Connector” is licensed.
- **Due date**
Deadline until when the MDS must be sent to the customer for an item, for which the LCM request will be created.
Value is automatically set to **due date = LCM request creation date + Number of days for due date** (defined in the “**LCM Parameter**” screen).
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.

- **Remark**

Internal remarks for the LCM request can be entered into this field.

Following additional information are displayed in the LCM request form:

- **Online request**

This checkbox is checked if the LCM request was received from the online IMDS system. This checkbox is read-only and cannot be modified by the user.

- **Source system Id (optional)**

ID of the request in the customer system used to create a link between it and LCM request.

PLEASE NOTE: All non IMDS-fields in the LCM request can contain non-ASCII & ISO8859-1 characters. For a proper functionality, the iPCA database must be on UTF8. In case the special characters are entered into the IMDS fields in the LCM request, error message is displayed and characters are replaced with spaces.



Figure 2 Error message shown to the user in case illegal characters were inserted

5.2.2 LCM documents

In the “**Documents**” tab files can be managed for the LCM request (see **Figure 3**).

This allows addition of external documents to the request (e.g. drawings, orders , etc.).

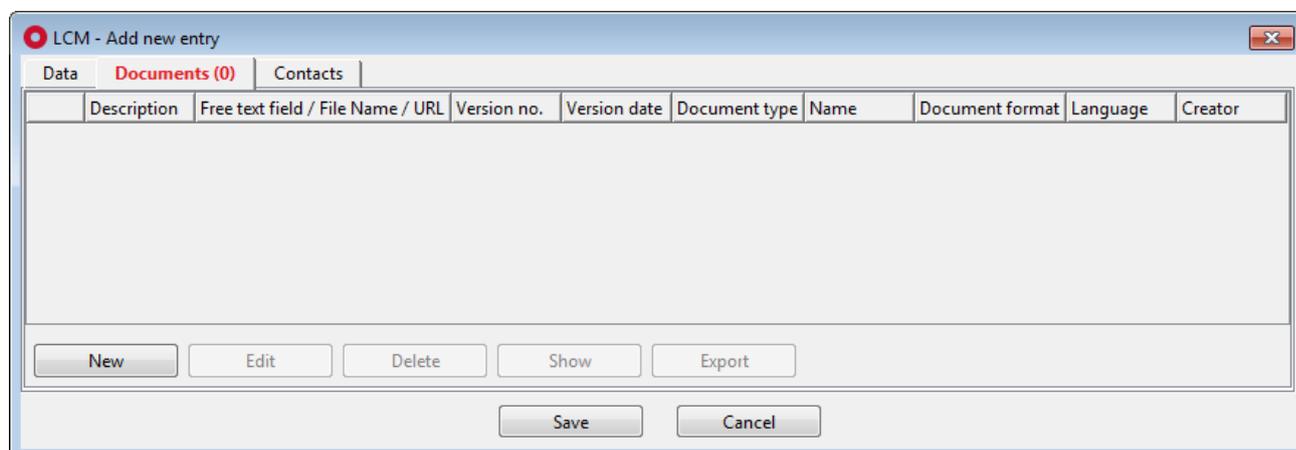


Figure 3 Documents tab in the LCM request window

Following buttons are available:

- **New**

Upon clicking on this button, the dialog window is shown (see **Figure 4**).
Defined document can be then added to the LCM request by click on the “**Apply**” button.

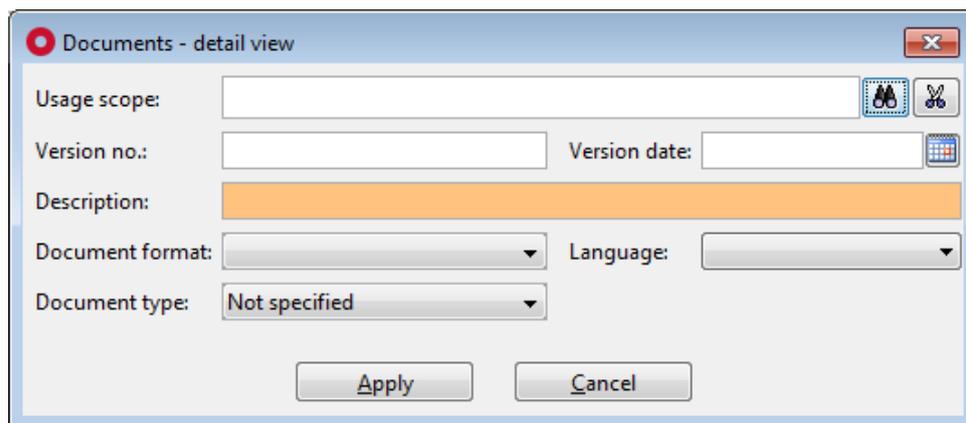


Figure 4 Dialog for addition of the document to the LCM request

- **Edit**

The details of the document assigned to the LCM request can be edited by click on the “**Edit**” button

- **Delete**

The document can be removed from the LCM request by its selection in the overview of the documents and by click on the “**Delete**” button.

This will bring up a small pop-up window (see Figure 5).

By click on the “**Yes**” button the document will be removed from the LCM request. By click on the “**No**” button, the document will be kept in the LCM request.

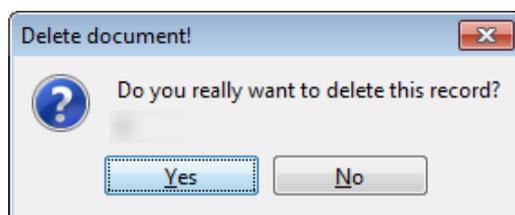


Figure 5 Confirmation of deletion of a file from the **LCM** request

- **Show**

The document stored in the LCM request can be displayed by first selecting it in the overview of the files (see **Figure 3**) and by click on the “**Show**” button.

PLEASE NOTE: The file is opened in the program which is associated to the particular document type within the operation system installed on the client machine. In case there is no program available for particular document type (e.g. PDF), the file will not be opened.

- **Export**

The document stored in the LCM request can be exported by first selecting it in the overview of the files (see **Figure 3**) and clicking on the “**Export**” button.

This will load a dialog window for saving the file (see **Figure 6**). The target directory for storage of the document can be defined by click on the “**File...**” button and then by click on the “**Save**” button

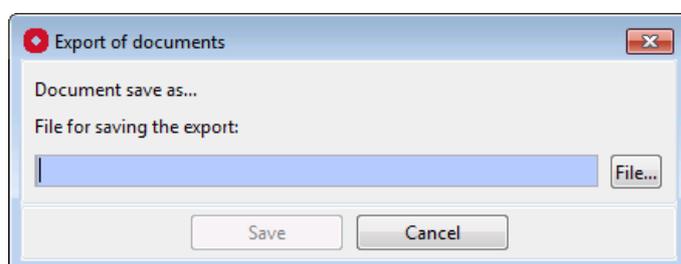


Figure 6 Dialog for exporting the file from the LCM request

PLEASE NOTE: Only user with activated permission “**LM_MANAGE_DOCUMENTS**” can manage documents within the LCM request.

5.2.3 LCM contacts

In the “**Contacts**” tab IMDS and quality assurance contacts can be defined for the LCM request (see **Figure 7**).

This allows to inform these users about various events (as per settings in the iPCA Event manager – see **chapter 24** in the IHS user manual) happening for the LCM request.

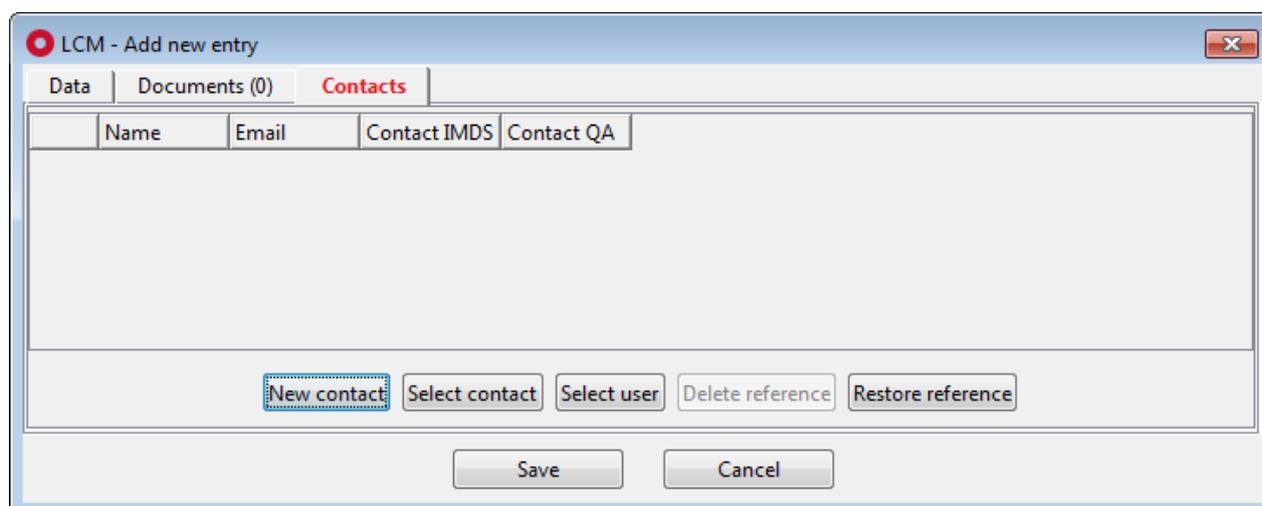
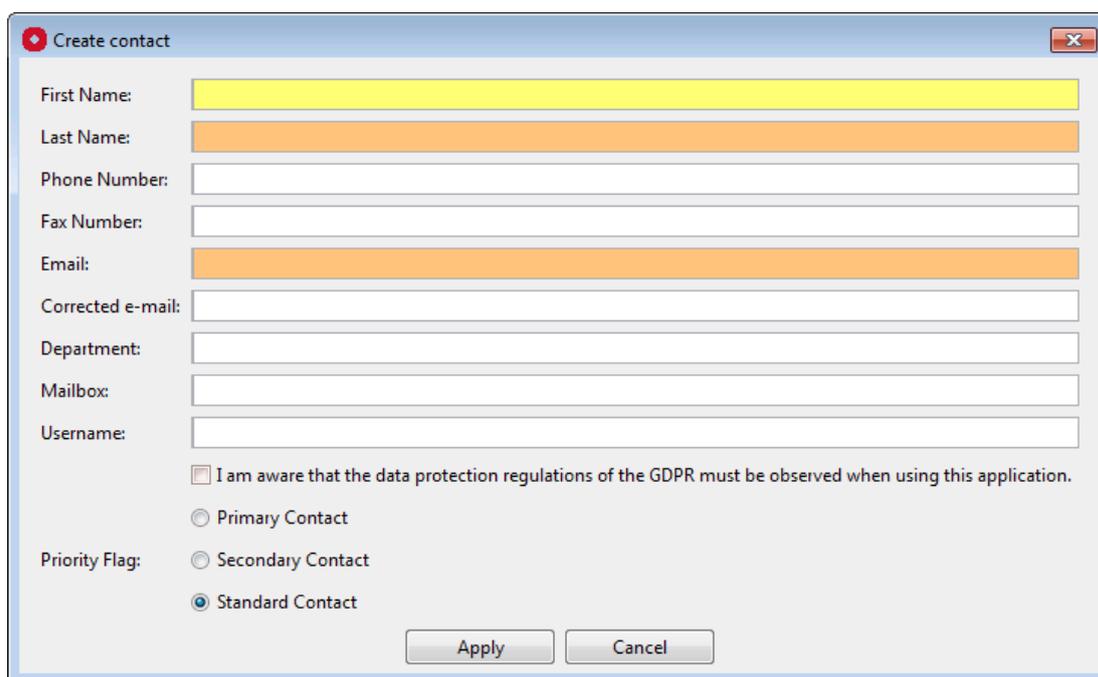


Figure 7 Contacts tab in the LCM request window

Following buttons are available:

- **New contact**

Upon clicking on this button, the create contact dialog is shown (see **Figure 8**). Created contact can be then added to the LCM request as contact by click on the “**Apply**” button. For more details about creation of the contact in iPCA, check IHS user manual, **chapter 23.2.3.2.3.4.1**.



The 'Create contact' dialog box contains the following fields and options:

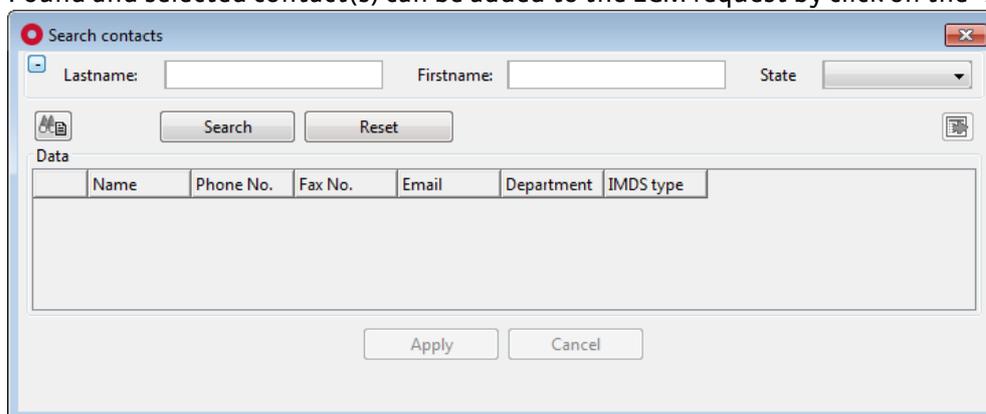
- First Name:
- Last Name:
- Phone Number:
- Fax Number:
- Email:
- Corrected e-mail:
- Department:
- Mailbox:
- Username:
- I am aware that the data protection regulations of the GDPR must be observed when using this application.
- Priority Flag:
 - Primary Contact
 - Secondary Contact
 - Standard Contact

Buttons:

Figure 8 Dialog for creation of new contact from the LCM request

- **Select contact**

Upon clicking on this button, the contact search dialog is shown (see **Figure 9**). Found and selected contact(s) can be added to the LCM request by click on the “**Apply**” button.



The 'Search contacts' dialog box contains the following fields and options:

- Lastname:
- Firstname:
- State:
-
- Data table:

Name	Phone No.	Fax No.	Email	Department	IMDS type

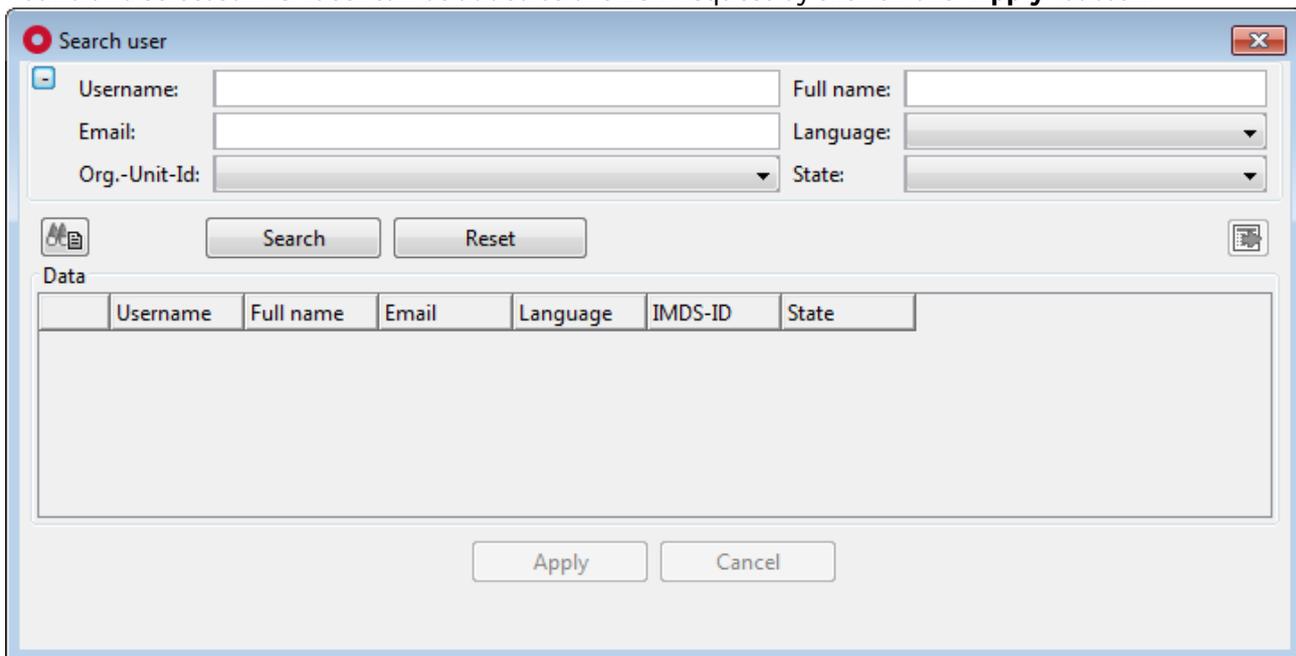
Buttons:

Figure 9 Dialog for search of the contact

- **Select user**

Upon clicking on this button, the iPCA user search dialog is shown (see **Figure 10**).

Found and selected iPCA user can be added to the LCM request by click on the “**Apply**” button.



Username	Full name	Email	Language	IMDS-ID	State
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Figure 10 Dialog for search of the iPCA user

- **Delete reference**

Upon clicking on this button, the dialog is shown asking if the selected entries in the “**Contacts**” panel should be marked for deletion (see **Figure 11**).

Upon click on “**Yes**” button, the selected records will be strikethrough and deleted on click on the “**Save**” button.

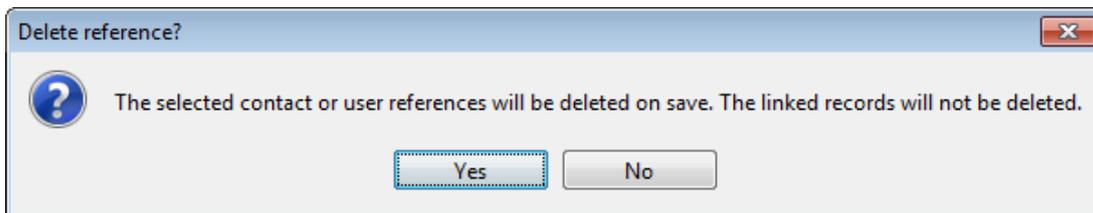


Figure 11 Dialog asking used if selected records should be marked for deletion

- **Restore reference**

Upon clicking on this button, the selected entries in the “**Contacts**” panel marked for deletion will be unmarked.

As soon as the contact/iPCA user is added to the list, it must be marked whether it is IMDS and/or QA contact.

Also, there can be multiple contacts marked as IMDS or QA.

5.2.4 Finishing LCM request creation

Once all details of the LCM request are defined, following buttons can be used:

- **Save**
Saves the LCM request in iPCA and closes the form.
PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 12**).

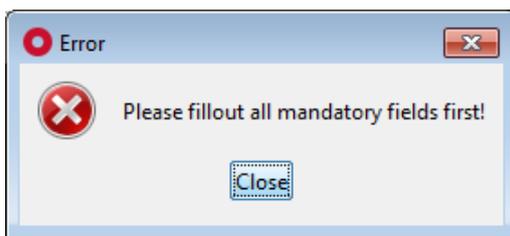


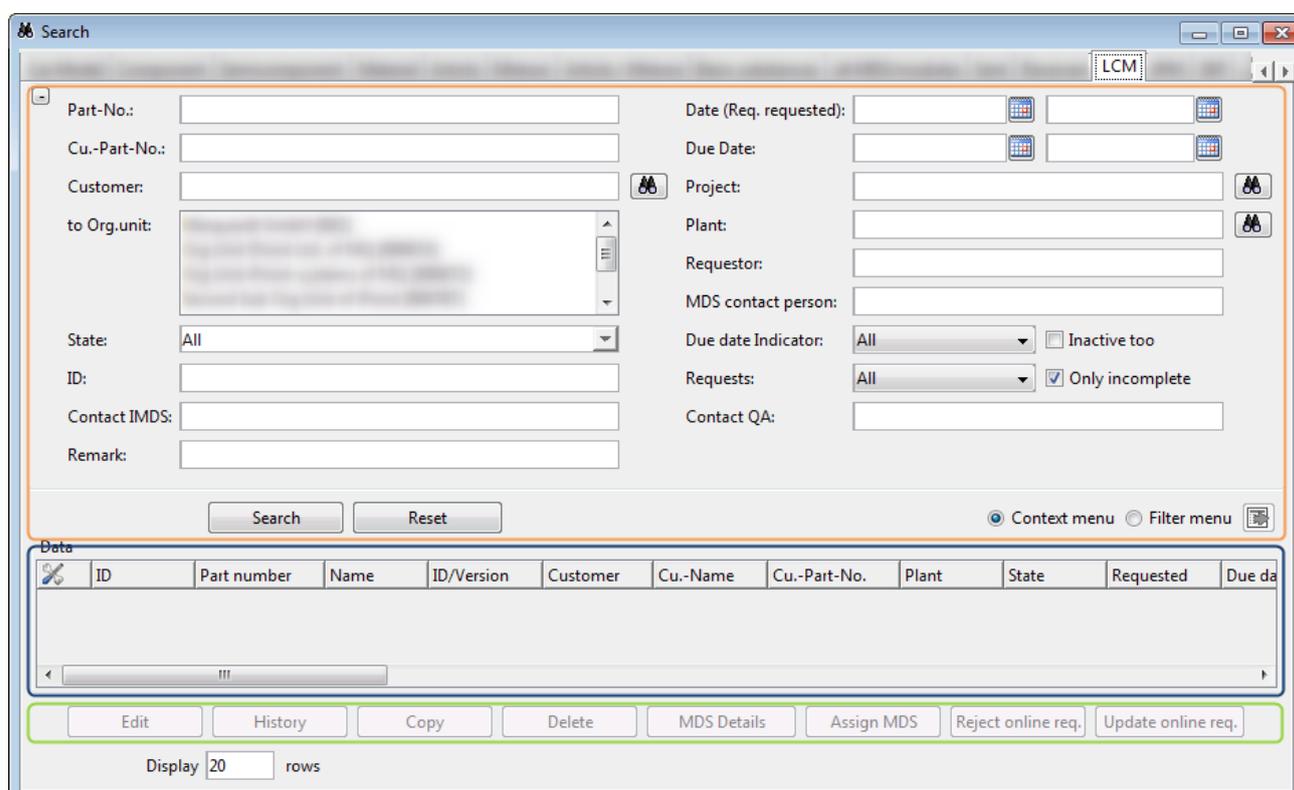
Figure 12 Error message shown on save of a LCM request

- **Cancel**
Discards changes done.

6 LCM tab

The LCM tab is split into three areas:

1. Search mask (orange) - see **chapter 6.1**
2. Result list (blue) - see **chapter 6.2**
3. Buttons (green) - see **chapter 6.3**



The screenshot shows the 'Search' window with the 'LCM' tab selected. The search mask (orange border) includes the following fields:

- Part-No. (text input)
- Cu.-Part-No. (text input)
- Customer (text input)
- to Org.unit (dropdown menu)
- State (dropdown menu, set to 'All')
- ID (text input)
- Contact IMDS (text input)
- Remark (text input)
- Date (Req. requested) (calendar input)
- Due Date (calendar input)
- Project (text input)
- Plant (text input)
- Requestor (text input)
- MDS contact person (text input)
- Due date Indicator (dropdown menu, set to 'All')
- Requests (dropdown menu, set to 'All')
- Contact QA (text input)

Below the search mask are 'Search' and 'Reset' buttons. To the right are radio buttons for 'Context menu' (selected) and 'Filter menu', along with a help icon.

The 'Data' table (blue border) has the following columns: ID, Part number, Name, ID/Version, Customer, Cu.-Name, Cu.-Part-No., Plant, State, Requested, Due da. The table is currently empty.

At the bottom (green border) are buttons: Edit, History, Copy, Delete, MDS Details, Assign MDS, Reject online req., Update online req. Below these buttons is a 'Display 20 rows' label.

Figure 13 LCM tab

6.1 Search mask

Enables to search for LCM request based on defined search criteria.

The following search criteria are available:

- **Part-No.**
Own part number of the item, for which the LCM request was created
PLEASE NOTE: When search using the asterisk "*", requests without a part number defined will not be found.
- **Cu.-Part-No.**
The customer part number



- **Customer**

Company, which is the recipient of the MDS requested in LCM request.

Upon click on  button, a company search panel is opened. Upon selection of a company and search for LCM requests, all LCM requests existing for selected company are listed.

- **to Org. unit**

Own organization unit(s) for which the LCM request(s) was (were) created.

- **State**

State of the LCM request

- All
- Request inactive
- Request acquired
- Request int. rejected
- Request int. accepted
- Duplicated request
- Assigned MDS incomplete
- Assigned MDS with errors
- Assigned MDS ok
- Assigned preliminary MDS ok
- Assigned MDS released
- Assigned preliminary MDS released
- Assigned MDS sent
- Assigned preliminary MDS sent
- Assigned MDS rejected
- Assigned preliminary MDS rejected
- Assigned MDS accepted
- Assigned preliminary MDS accepted

- **ID**

The ID of the LCM request.

- **Contact IMDS**

Name of the contact defined in the LCM request as IMDS contact.

- **Remark**

Remark of the LCM request.

- **Date (Req. requested)**

Period of time in which the LCM request was created.

This can be defined either manually in the text field or by using  button and selecting the date from the calendar shown.

- **Due date**

Period of time in which the due date of LCM request was specified.

This can be defined either manually in the text field or by using  button and selecting the date from the calendar shown.

- **Project**

The project, which linked to the item, for which the LCM request was created.

Upon click on  button, a project search panel is opened. Upon selection of a project and search for LCM requests, all LCM requests existing for selected project are listed.

- **Plant**

Manufacturing plant of the item, for which the LCM request was created.

Upon click on  button, a plant search panel is opened. Upon selection of a plant and search for LCM requests, all LCM requests existing for selected plant are listed.

- **Requestor**

Name of the user who created the LCM request (using iPCA full name).

- **MDS contact person**

Name of the contact person of the MDS assigned to the LCM request (format <last name, first name>).

- **Due date indicator**

An estimation, whether the LCM request can be handled until given due date:

- All
- Red
- Yellow
- Green
- Grey

- **Inactive too**

If this checkbox is checked, also inactive LCM requests will be shown in the result list.

- **Requests**

Type of the request:

- All
All kind of LCM requests will be shown in the result list
- Only IMDS req.
Only LCM requests which were received from the online system be shown in the result list
- Only offline req.
Only LCM requests which were created internally be shown in the result list
- Only int. req.
Only LCM requests which are company internal will be shown in the result list

- **Only incomplete**

If this checkbox is checked, only incomplete LCM requests will be shown in the result list.

PLEASE NOTE: By default, this checkbox is checked upon opening the LCM search panel. The default value can be changed by the system administrator by setting the value of the configuration parameter “**LCM_SEARCH_DEFAULT_INCOMPLETE_ONLY**” to “**FALSE**”.

- **Contact QA**

Name of the contact defined in the LCM request as QA contact.

Following actions are available:

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

6.2 Result list

The result list displays LCM requests as per defined search criteria.

Each row represents one LCM request.

The following standard columns are available:

- **ID**
The ID of the LCM request.
- **Part number**
Own part number of the item, for which the LCM request was created.
- **Name**
Own part name of the item, for which the LCM request was created.
- **ID/Version**
IMDS ID and version defined in the “**ID/Version**” field in the datasheet assigned to the LCM request.
- **Customer**
Name of the customer shown in the format “**Company Name (Organization Unit Name [Company ID])**”.
- **Cu.-Name**
Customer part name set in the LCM request.
- **Cu.-Part-No.**
Customer part number set in the LCM request.
- **Plant**
Manufacturing plant set in the LCM request.

- **State**

The actual state of the LCM request is visualized using a combination of four symbols.

Following states are available:

Request status	MDS state	MDS release	MDS recipient status	Status
●	●	●	●	Request inactive
◆	●	●	●	Request acquired
◆	◆	●	●	Request internally rejected
▲	●	●	●	Request internally accepted
◆	▲	●	●	Duplicated request
▲	◆	●	●	Assigned MDS incomplete
▲	▲	●	●	Assigned MDS with errors
▲	▲	▲	●	Assigned preliminary MDS ok
▲	■	▲	●	Assigned MDS ok
▲	▲	■	●	Assigned preliminary MDS released
▲	■	■	●	Assigned MDS released
▲	▲	■	▲	Assigned preliminary MDS sent
▲	■	■	▲	Assigned MDS sent
▲	▲	■	◆	Assigned preliminary MDS rejected
▲	■	■	◆	Assigned MDS rejected
■	▲	■	■	Assigned preliminary MDS accepted
■	■	■	■	Assigned MDS accepted

Table 1 List of possible LCM request statuses

PLEASE NOTE: The state of the LCM request is updated on a regular base, typically every 5-15 minutes. This interval can be changed in the configuration of the LCM update mission. If required, the state of the LCM request can be started manually in the iPCA by navigation to the menu “Extras → Update Request-State LCM”.

- **Requested**

Date when the LCM request was created.

- **Due date**

Due date indicator for the LCM request.

The due date indicator provides a hint whether a given deadline for a LCM request can be met or not.

Following symbols are available:

Symbol	Status
	Deadline exceeded or not reachable
	Deadline critical to be reached
	Deadline can be met
	Request inactive or no deadline defined

Table 2 List of due date indicator states

- **Due-date**

Due date defined for the LCM request.

- **Sent**

Date when the datasheet for the LCM request was sent to the customer.

- **Type**

Type of the LCM request:

- IMDS
Request received from IMDS online system
- Offline
Request created by the company for submission to the customer
- Internal
Request created by the company for internal part

- **Org.-Unit**

Own organization unit, which is requested to create MDS for an item requested in the LCM request.

- **Preliminary**

Information whether the LCM request is requesting preliminary MDS or not.

- **Source System ID**

ID of the request in the customer system used to create a link between it and LCM request.

- **Cust. Project-Name**

Customer name of the project set in the LCM request.

- **Purchase Order-No.**

The purchase order number set in the LCM request.



- **Bill of Delivery-No.**
Bill of delivery number set in the LCM request.
- **Supplier Code**
The supplier code of the own company at the customer side.
- **Supplier Site Code**
The supplier site code of the own company at the customer side.
- **Drawing-No.**
The drawing number set in the LCM request.
- **Drawing Change Level**
The change level of the drawing set in the LCM request.
- **Drawing Dated**
The date of the drawing set in the LCM request.
- **Report-No.**
The number of the sample report set in the LCM request.
- **Date of Report**
The date of the sample report set in the LCM request.
- **MDS Type**
Type of the MDS set in the LCM request.
- **Project Name**
The name of the project set in the LCM request.
- **Creator of request**
Name of the user who created the LCM request (using iPCA full name).
- **MNS**
Information if the LCM request is for multiple part numbers.
- **MNS MDS**
Information if the datasheet assigned to the LCM request is for multiple part numbers.
- **Contact IMDS**
Contact(s) defined in the LCM request as IMDS contact(s).
- **Contact QA**
Contact(s) defined in the LCM request as QA contact(s).

The order of the columns in the result list and columns displayed can be managed by the user. For more details see IHS usermanual, **chapter 29**.

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

6.3 Buttons

The following actions are available:

- **Edit / Show**
Loads LCM request form populated with details of selected LCM request in either edit or read-only mode (see **chapter 6.3.1**)
- **History**
Opens history of the selected LCM request (see **chapter 6.3.2**)
- **Copy**
Creates a new LCM request by copying a selected LCM request (see **chapter 6.3.3**)
- **Delete**
Deletes the selected LCM request(s) (see **chapter 6.3.3**)
- **MDS Details**
Loads MDS assigned to the selected LCM request (see **chapter 6.3.4**)
- **Assign MDS**
Allows manual assignment of the MDS to the selected LCM request (see **chapter 6.3.6**)
- **Reject online req.**
Allows rejection LCM request using online IMDS system (see **chapter 6.3.7**)
- **Update online req.**
Allows sending an update on selected LCM request to the online IMDS system (see **chapter 6.3.8**)

6.3.1 Edit / Show

Label and function of this button is interactive:

- If the user has write LCM permission, the label of this button is “**Load**”. By click, the LCM request is loaded and depending on its state and origin can be also edited.
- If the user has read-only LCM, the label of this button is “**Show**”. By click, the LCM request is loaded as read-only.

Following information are available in the LCM request:

- **Part-No.**
Can be changed only if MDS is not assigned to the IMDS / offline LCM request which was not rejected.
- **Multi numbers**
Can be changed in all cases.

- **Plant**
Can be changed only if MDS is not assigned to the IMDS / offline LCM request which was not rejected.
- **Project**
Can be changed only if MDS is not assigned to the IMDS / offline LCM request which was not rejected.
- **Org. -Unit**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected.
- **MDS Type**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected.
- **Customer**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected.
- **IMDS OrgUnit**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected.
- **Cust. Project-Name**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Customer-Part-/Item/-Mat.-No.**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Drawing No.**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Customer Description**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Dr. change level**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Purchase Order No.**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Drawing dated**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.



- **Bill of delivery No.**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Report No.**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Supplier Code**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Supplier Site Code**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
Is displayed only in case the customer is one of below listed companies:
 - Ford Motor Company (102)
 - Volvo Car Corporation (106) (displayed as read-only because of historical requests)
 - Jaguar Land Rover Limited (297)
- **Date of Report**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Request preliminary**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected or if not yet send or rejected MDS is assigned to the offline LCM request.
- **Active**
Can be changed only in offline LCM request.
On uncheck of the “**Active**” checkbox, the user is asked, if the LCM request should be really deactivated which will cause that the recipient data populated from the LCM request will be removed from the MDS (see **Figure 14**).

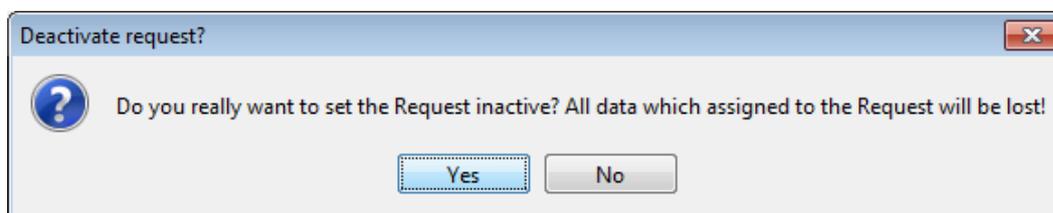


Figure 14 Question whether the LCM request should be deactivated

- **Due date**
Can be changed only if MDS is not assigned to the offline LCM request which was not rejected.
- **Remark**
Can be changed in every case.

- **Reject reason**
Can be changed unless the LCM request is inactive or closed.

Following actions are available:

- **Save**
Saves the LCM request in iPCA and closes the form.
- **Accept Request internally**
Accepts offline / internal LCM request.
In such case an automatic assignment of the MDS with matching part number to the LCM request is done.
Status of the LCM request is set to “**Request int. accepted**”.
This button is displayed only in case the LCM offline / internal request was not accepted or rejected yet.
- **Reject Request internally**
Rejects offline / internal LCM request.
Status of the LCM request is set to “**Request int. rejected**”.
This button is displayed only in case the LCM offline / internal request was not accepted or rejected yet.
- **Accept MDS int.**
Accepts own MDS which is in IHS ready state or internally released in IMDS online system for usage in the LCM request.
Status of the LCM request is set to “**Assigned MDS accepted**”.
PLEASE NOTE: As the online system IMDS is not supporting the sending of MDS within a company, internal requests can be handled only in iPCA/LCM.
- **Reject MDS int.**
Rejects own MDS which is in IHS ready state or internally released in IMDS online system for usage in the LCM request.
Status of the LCM request is set to “**Assigned MDS rejected**”.
PLEASE NOTE: As the online system IMDS is not supporting the sending of MDS within a company, internal requests can be handled only in iPCA/LCM.
- **Cancel**
Discards changes done.

PLEASE NOTE: Only user with activated permission “**LM**” can edit the LCM request.

6.3.2 History

The detailed history of the selected LCM request can be seen by click on the “**History**” button. This loads a window populated with details of a LCM request (see **Figure 15**).

The following actions are available:

- **Export**
Exports the history window, e.g. to PDF format
- **MDS Details**
Loads MDS assigned to the LCM request
- **Cancel**
Closes the history window

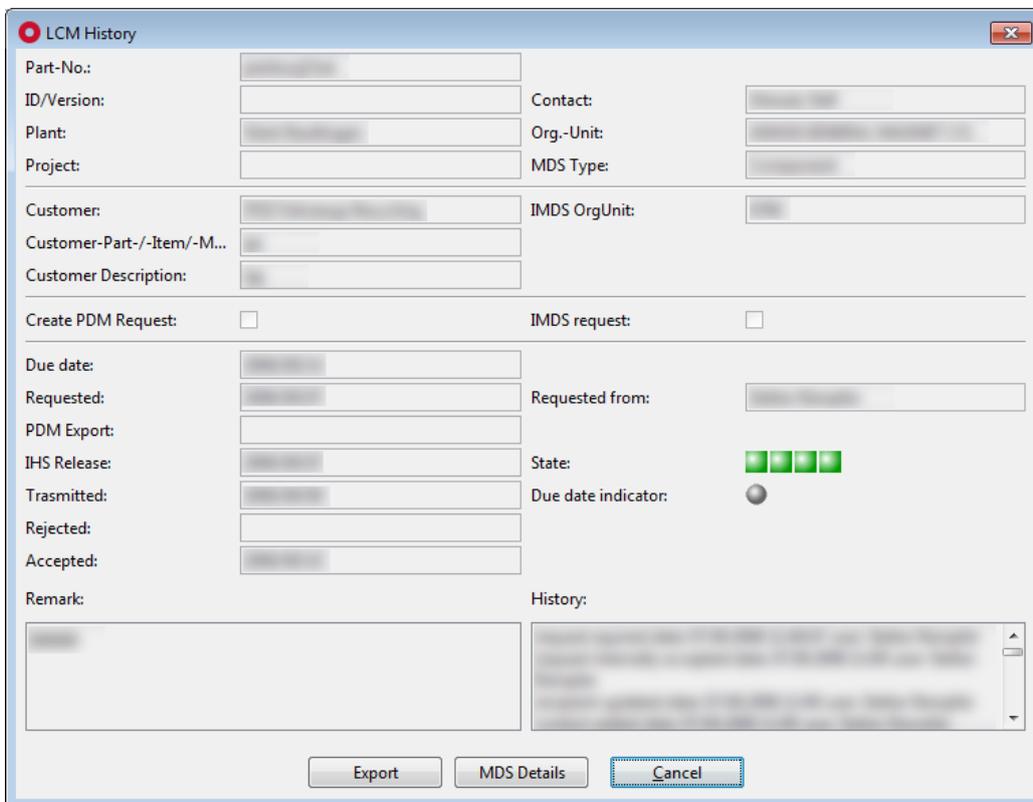


Figure 15 LCM History panel

6.3.3 Copy

A new LCM request can be created by copying an existing LCM request selected in the result table by click on the **“Copy”** button. This loads a standard LCM dialog window populated with data from the original LCM request.

On copy, following item compared is changed to the original LCM request:

- **Due date**
Value is set to due date = LCM request creation date + Number of days for due date (defined in the “LCM Parameter” screen)

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

PLEASE NOTE: Only user with activated permission “**LM**” can copy LCM request.

6.3.4 Delete

Selected active LCM request(s) can be deleted by click on the “**Delete**” button:

- In case the selected LCM request(s) is(are) not linked to any MDS yet, below question is displayed to the user

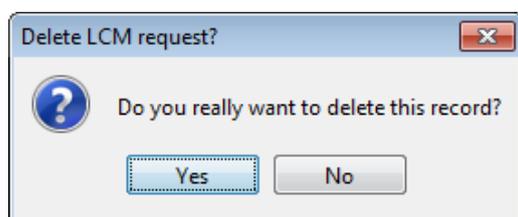


Figure 16 Confirmation of deletion of a LCM request

- In case the select LCM request(s) is(are) not linked to any MDS yet, below question is displayed to the user

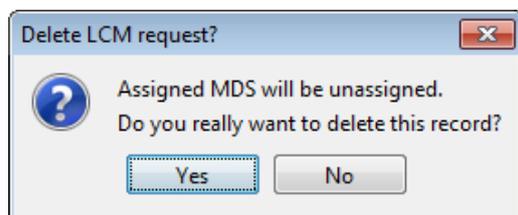


Figure 17 Confirmation of deletion of a LCM request linked with MDS

In both cases, Bby click on the “**No**” button, the LCM request(s) will be kept.

By click on the “**Yes**” button the deletion process is triggered for selected LCM request(s). Each LCM request is validated for deletion feasibility. In case it is linked with MDS, then various actions may take place. For the summary of all possible actions, see the **Table 3** below. Once all the LCM requests selected for deletion are process, the summary is displayed (see **Figure 18**).

Use case	LCM request deleted?	Recipient data removed?	Message displayed
MDS is in the upload queue from iPCA to IMDS	yes	no	Recipient data can not be deleted as MDS is in upload
Recipient data in the MDS are from LCM request and the status is	yes	yes	Recipient data deleted



Use case	LCM request deleted?	Recipient data removed?	Message displayed
“new in IHS”			
MDS was already sent to the customer	yes	no	The recipient data can not be deleted as already available in IMDS

Table 3 Summary of cases that may occur during LCM request deletion

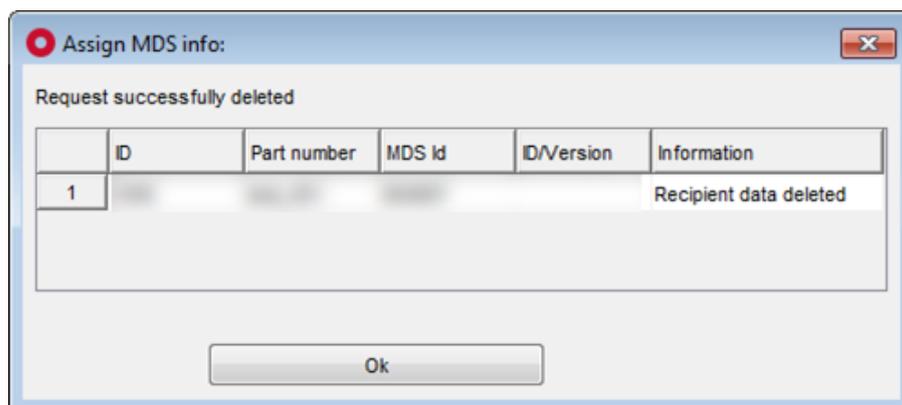


Figure 18 Summary displayed after LCM deletion process is finished

PLEASE NOTE: Only user with activated permission “**LM_DELETE**” can delete the LCM request.

6.3.5 MDS Details

The MDS linked to the selected LCM request can be loaded by click on the “**MDS Details**” button.

This button is active, if the selected LCM request has an MDS assigned to it.

PLEASE NOTE: Only user with activated permission “**LM_SHOW_MDS_DETAILS**” can open the MDS linked to the LCM request.

6.3.6 Assign MDS

The MDS can be manually assigned to the selected LCM request by click on the “**Assign MDS**” button. This loads a standard search window for own MDS with pre-selected type of the MDS according to the requested type of the MDS defined in the LCM request. If MDS was found, displayed and selected in the search result list, it can be assigned to the selected LCM request by click on the “**Apply**” button.

In case the recipient defined in the assigned MDS is the same as the recipient defined in the LCM request and the recipient status of this recipient in MDS is “**new in IHS**”, a notification is shown to the user (see **Figure 19**). By click on the “**Yes**” button the recipient data in the assigned MDS will be updated with recipient data defined in the LCM request. By click on the “**No**” button, the MDS will not be assigned to the LCM request.

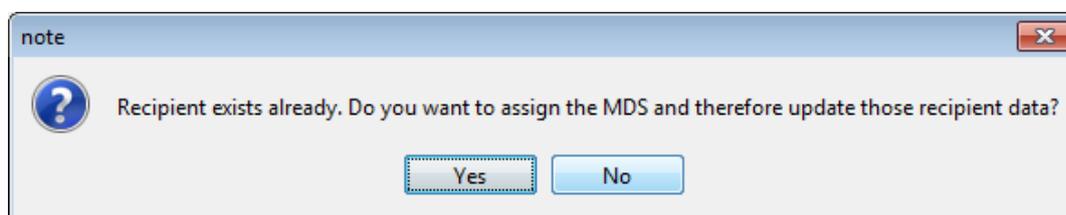


Figure 19 Notification that recipient in the MDS is the same as in LCM request

In case the recipient defined in the assigned MDS is the same as the recipient defined in the LCM request and the MDS has already been sent to this customer, a notification is shown to the user (see **Figure 20**). By click on the “**Yes**” button the status of the LCM request will be updated according to the recipient status of the assigned MDS. Recipient data in LCM request will not be updated with data from assigned MDS. By click on the “**No**” button, the MDS will not be assigned to the LCM request.

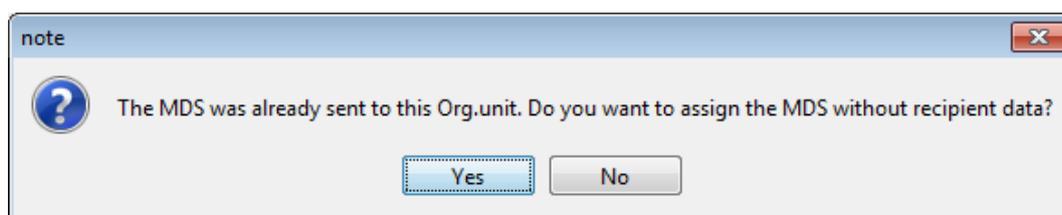


Figure 20 Notification that MDS was already sent to recipient defined in the LCM request

All of the actions above will be logged in the history of the LCM request.

PLEASE NOTE: Upon assignment of the MDS, the part number of the LCM request is changed to the part number of the MDS.

PLEASE NOTE: Only user with activated permission “**LM**” can assign MDS to the LCM request.

6.3.7 Reject Online Request

An LCM request received from the online IMDS system can be rejected by click on the “**Reject online req.**” button. Then, the notification is shown to the user (see **Figure 21**).

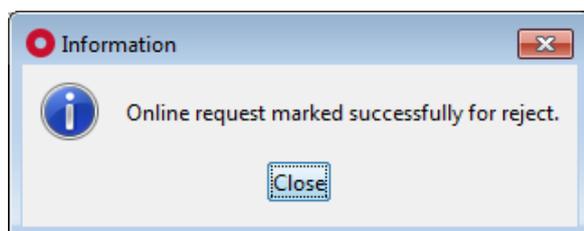


Figure 21 Notification that the LCM request was marked to be rejected in IMDS online system

It is recommended to enter a reason for rejection into the LCM request before its rejection. To enter the reason, the request must be opened and text entered into the field “**Reject reason**”.

If the upload of the rejection is successful, the status of the LCM request is changed to rejected.

This action will be logged in the history of the LCM request.

This button is active only if the selected LCM request is from IMDS.

PLEASE NOTE: Only user with activated permission “**LM_IMDS_UPLOAD**” can reject LCM request to the online IMDS system.

6.3.8 Update Online Request

A status of an LCM request received from the online IMDS system can be updated by click on the “**Update online req.**” button. This function could be used to inform customer that the work on the request has already been started. Pre-requisite is that LCM request has assigned MDS which has already been uploaded to IMDS. Then, the notification is shown to the user (see **Figure 22**).

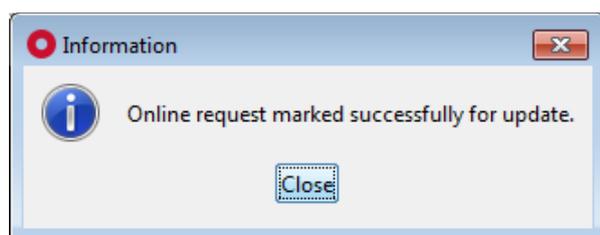


Figure 22 Notification that the LCM request was marked for an update in IMDS online system

In case the MDS which is assigned to the LCM request was not yet uploaded to IMDS online system, the status of the LCM request cannot be updated and the notification is shown to the user (see **Figure 23**).

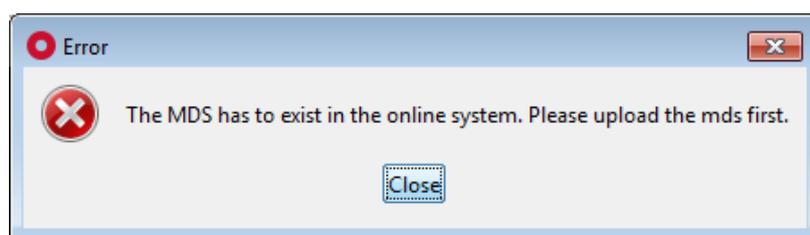


Figure 23 Notification that MDS assigned to the LCM request does not exist in IMDS online system

In case the MDS is not yet assigned to the LCM request, the status of the LCM request cannot be updated and the notification is shown to the user (see **Figure 24**).

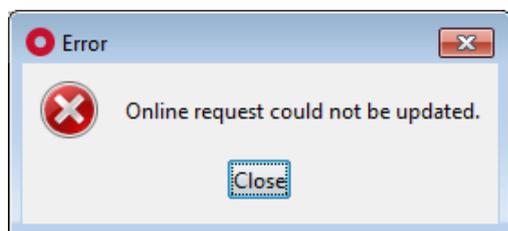


Figure 24 Notification that the LMC request cannot be updated in IMDS online system

This action will be logged in the history of the LCM request.

This button is active only if the selected LCM request is from IMDS.

PLEASE NOTE: Only user with activated permission “**LM_IMDS_UPLOAD**” can delete LCM request from the online IMDS system.

7 LCM Configuration and master data

7.1 LCM Parameter

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

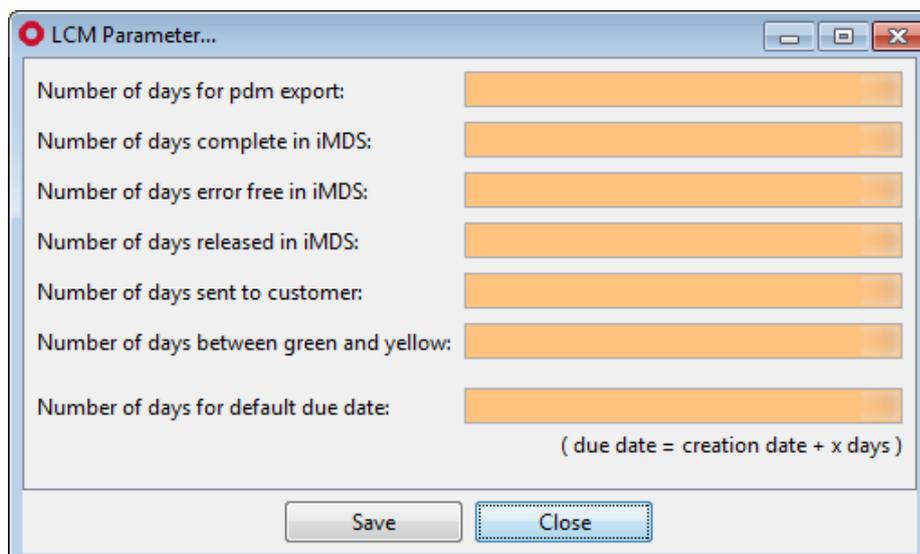


Figure 25 LCM Parameters screen

Following calculation parameter must be specified (the days are describing the change from one state to the next)

- **Number of days for pdm export**
The amount of days required to for extraction of the BOM from PDM and import to iPCA
- **Number of days for until complete in iMDS**
The amount of days required for completion of the MDS (all own and received MDS are available)
- **Number of days for until error free in iMDS**
The amount of days required until all errors found by the quality checker are corrected
- **Number of days for release in iMDS**
The amount of days required for setting MDS to “**IHS ready**” state
- **Number of days for sent to customer**
The amount of days required to add the recipient information and to send the MDS to the customer
- **Number of days between green and yellow**
The amount of buffer days to differentiate between yellow and red

- **Number of days for default due date**

The amount of days used for the calculation of the due date indicator. The due date will be prefilled if you create a new request (due date = creation date + amount of specified days)

PLEASE NOTE: Only user with activated permission “**ADMIN_LM**” can access LCM management.

7.2 Projects Master Data

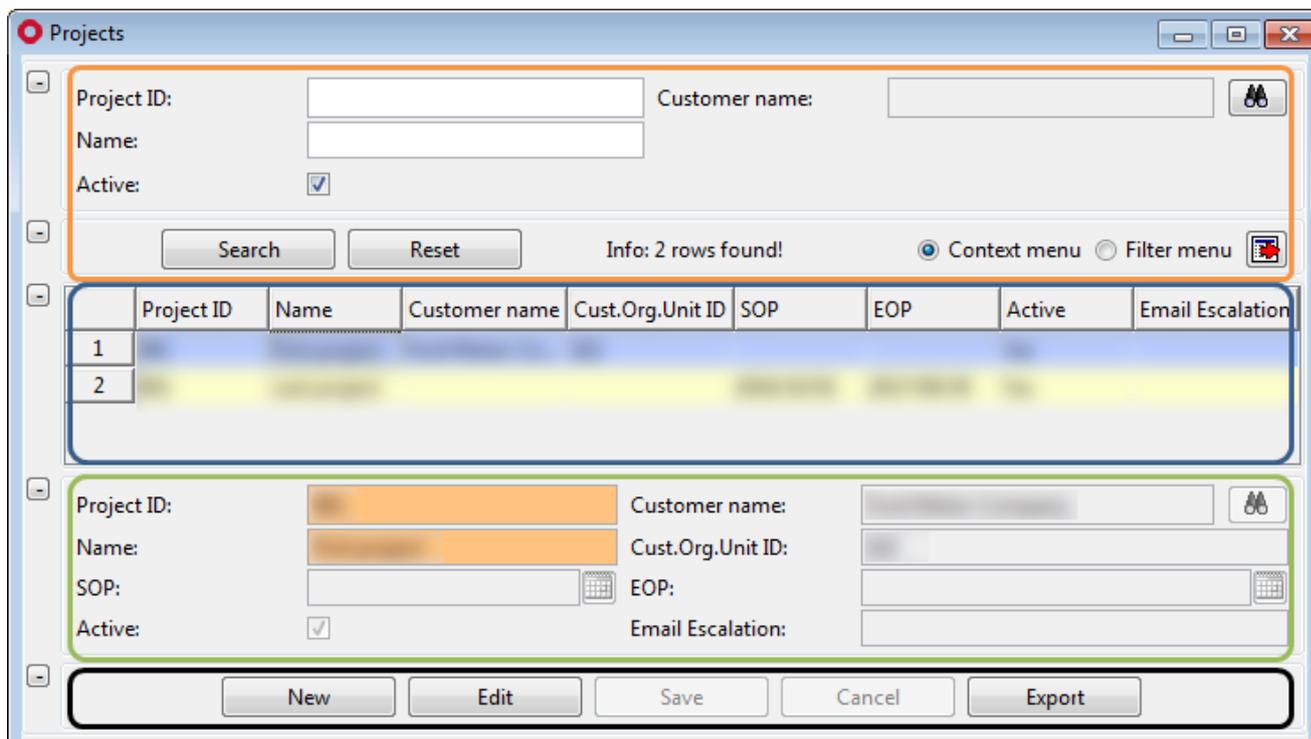
LCM request can be linked with the project.

To manage the projects, panel for management of the projects in iPCA needs be opened by navigation to the menu “**Extras → Master data → Projects**”.

PLEASE NOTE: Only user with activated permissions “**PROJECTS_VIEW**” and/or “**PROJECTS_VIEW_EDIT**” can access project master data.

The panel for the management of projects is split into three areas:

1. Search mask (orange) – see **chapter 7.2.1**
2. Result list (blue) – see **chapter 7.2.2**
3. Project details (green) - see **chapter 7.2.3**
4. Actions (black) - see **chapter 7.2.4**



The screenshot shows the 'Projects' management panel. It features a search mask (orange border) at the top with input fields for 'Project ID', 'Name', 'Customer name', and a checked 'Active' checkbox. Below the search mask is a result list (blue border) displaying a table with columns: Project ID, Name, Customer name, Cust.Org.Unit ID, SOP, EOP, Active, and Email Escalation. The table contains two rows, with the second row highlighted in yellow. Below the result list is a project details form (green border) with input fields for 'Project ID', 'Name', 'Customer name', 'Cust.Org.Unit ID', 'SOP', 'EOP', 'Active', and 'Email Escalation'. At the bottom of the panel is an actions bar (black border) with buttons for 'New', 'Edit', 'Save', 'Cancel', and 'Export'. The search mask also includes 'Search' and 'Reset' buttons, and the result list shows 'Info: 2 rows found!' and options for 'Context menu' and 'Filter menu'.

Figure 26 Projects management panel

7.2.1 Search mask

Enables to search for projects based on defined search criteria.

The following search criteria are available:

- **Project ID**
ID of the project.
- **Name**
Name of the project
- **Active**
Checkbox defining whether the project is active or not.
- **Customer name**
IMDS name of the customer.
Customer can be chosen using the  button, which will load standard company search window. Wished customer can be then confirmed by click on the “**Apply**” button.

The following actions are available:

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

7.2.2 Result list

The result list displays projects as per defined search criteria. Each row represents one project. Upon selection of the project, all its details are displayed in the project details area below.

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

7.2.3 Project details

Display the details of the selected project or allow definition of a new project.

7.2.4 Actions

The following actions are available:

- **New**
Empties and activates fields in the project details area and new details of the new project can be defined (see **chapter 7.2.4.1**).

- **Edit**
Activates fields in the project details and the details can be modified (see **chapter 7.2.4.2**).
- **Save**
Saves the new the project or changes in the project (see **chapter 7.2.4.3**).
- **Cancel**
Cancel the creation or edit of the project (see **chapter 7.2.4.4**).
- **Export**
Export the existing projects (see **chapter 7.2.4.5**).

7.2.4.1 New

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

This activates the details of project.

Following information must/could be defined:

- **Project ID**
Unique ID of the project.
This field is mandatory.
- **Name**
Name of the project.
This field is mandatory.
- **SOP**
Start of production of the project.
- **Active**
Checkbox defining whether the project is active or not.
- **Customer name**
IMDS name of the customer.
Customer can be chosen using the  button, which will load standard company search window. Wished customer can be then confirmed by click on the “**Apply**” button.
- **Cust.Org.Unit ID**
IMDS organization unit of the selected customer.
- **EOP**
End of production of the project.
- **Email Escalation**
Email address, which should be used for the escalation email instead of the default escalation email defined in the “**SPM Parameter**” screen.

7.2.4.2 Edit

All the details of the selected project except for the “**Project ID**” can be modified by click on the “**Edit**” button.

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

7.2.4.3 Save

The button is active only in case the project is being created or edited.

By click on it new or updated project is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 27**).

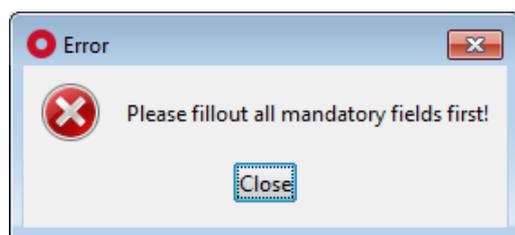


Figure 27 Error message shown on save of a project

7.2.4.4 Cancel

The button is active only in case the project is being created or edited.

By click on it creation or edit of the project is cancelled.

7.2.4.5 Export

The content of the result list could be exported to CSV or XLS(X) format by click on the “**Export**” button.

The user is then asked to choose a desired output format and define the location, where the exported file is to be stored. To learn more details about export function, please see the IHS user manual (see **chapter 6.4.4**).

7.3 Plants Master Data

LCM request can be linked with the plant.

Panel for management of the plants in iPCA can be opened by navigation to the menu “**Extras → Master data → Plants**”.

PLEASE NOTE: Only user with activated permissions “**PLANTS_VIEW**” and/or “**PLANTS_VIEW_EDIT**” can access plants master data.

The panel management of the plants is split into three areas:

1. Overview of plants (orange) - see **chapter 7.3.1**
2. Plant details (blue) - see **chapter 7.3.2**
3. Actions (green) - see **chapter 7.3.3**

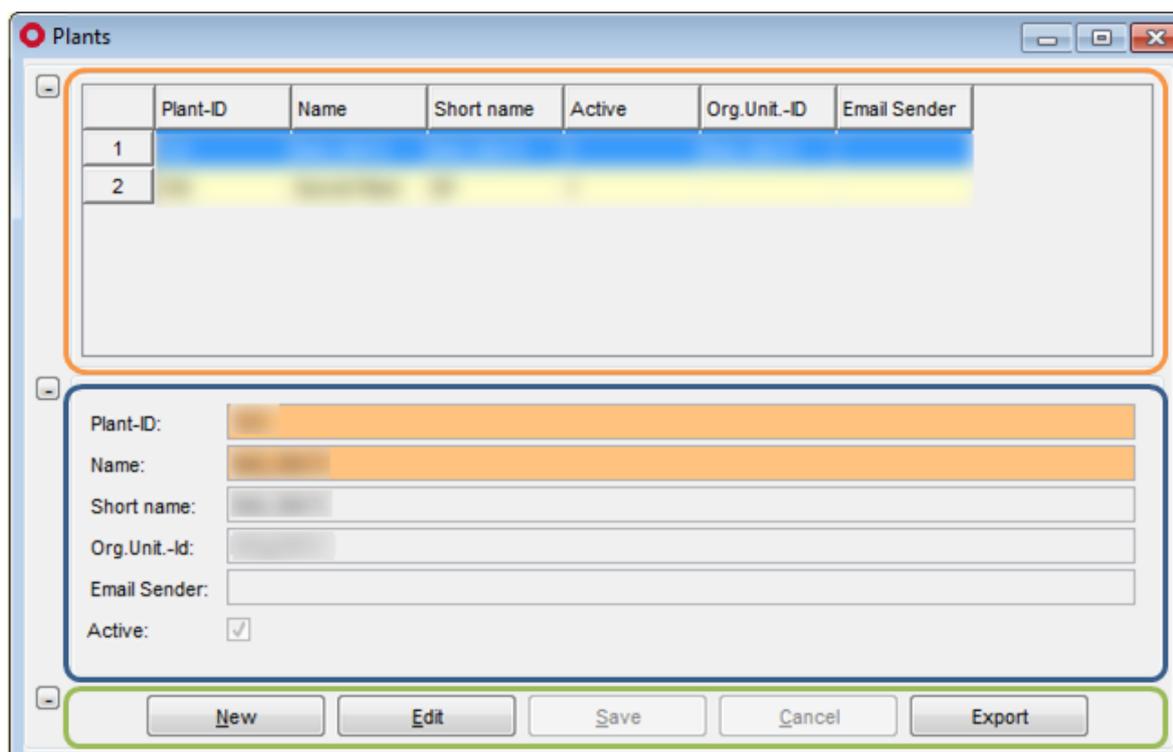


Figure 28 Plants management panel

7.3.1 Overview of plants

The list of plants is shown upon load of the plants management panel. Upon selection of the plant, all its details are displayed in the plant details area below.

7.3.2 Plant details

Following information must/could be defined

- **Plant-ID**
Unique ID of the plant. This field is mandatory.
- **Name**
Name of the plant. This field is mandatory.
- **Short name**
Short name (code) of the plant.
- **Org.Unit-Id**
IMDS organization unit related to the plant.
This is used for the translation of the plant code in the standard iPCA BOM to the own organization unit so that the MDS created by the IMDS of the BOM is assigned accordingly.
- **Email sender**
The email address, which should be used for submission of the SPM email assigned to the plant.
- **Active**
Checkbox defining whether the plant is active or not.

7.3.3 Actions

The following actions are available:

- **New**
Empties and activates fields in the plant details area and new details of the new plant can be defined (see **chapter 7.3.3.1**).
- **Edit**
Activates fields in the plant details and the details can be modified (see **chapter 7.3.3.2**).
PLEASE NOTE: Plant- ID cannot be changed
- **Save**
Saves the new the plant or changes in the plant (see **chapter 7.3.3.3**).
- **Cancel**
Cancel the creation or edit of the plant (see **chapter 7.3.3.4**).
- **Export**
Export the existing plants (see **chapter 7.3.3.5**).

7.3.3.1 New

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

This activates the details of plant.

Following information must/could be defined:

- **Plant-ID**
Unique ID of the plant.
This field is mandatory.
- **Name**
Name of the plant.
This field is mandatory.
- **Short name**
Short name of the plant.
- **Org.Unit-Id**
IMDS organization unit related to the plant.
This is used for the translation of the plant code in the standard iPCA BOM to the own organization unit so that the MDS created by the IMDS of the BOM is assigned accordingly.
- **Email Sender**
Email address, which should be used for the escalation email instead of the default escalation email defined in the “**SPM Parameter**” screen.
- **Active**
Checkbox defining whether the plant is active or not.

7.3.3.2 Edit

All the details of the selected plant except for the “**Plant-ID**” can be modified by click on the “**Edit**” button.

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

7.3.3.3 Save

The button is active only in case the plant is being created or edited.

By click on it new or updated plant is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 29**).

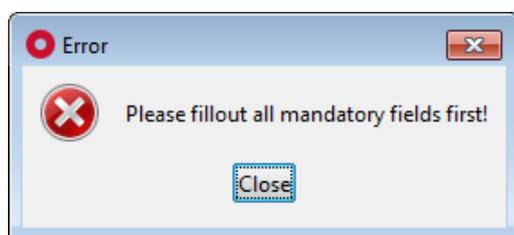


Figure 29 Error message shown on save of a plant

7.3.3.4 Cancel

The button is active only in case the plant is being created or edited.

By click on it creation or edit of the plant is cancelled.

7.3.3.5 Export

The content of the result list could be exported to CSV or XLS(X) format by click on the “**Export**” button.

The user is then asked to choose a desired output format and define the location, where the exported file is to be stored. To learn more details about export function, please see the IHS user manual (see **chapter 6.4.4**).



8 Table of tables

Table 1	List of possible LCM request statuses.....	22
Table 2	List of due date indicator states.....	23
Table 3	Summary of cases that may occur during LCM request deletion	31



9 Table of figures

Figure 1	Create new LCM request.....	9
Figure 2	Error message shown to the user in case illegal characters were inserted	12
Figure 3	Documents tab in the LCM request window	12
Figure 4	Dialog for addition of the document to the LCM request	13
Figure 5	Confirmation of deletion of a file from the LCM request	13
Figure 6	Dialog for exporting the file from the LCM request.....	14
Figure 7	Contacts tab in the LCM request window.....	14
Figure 8	Dialog for creation of new contact from the LCM request	15
Figure 9	Dialog for search of the contact.....	15
Figure 10	Dialog for search of the iPCA user	16
Figure 11	Dialog asking used if selected records should be marked for deletion	16
Figure 12	Error message shown on save of a LCM request.....	17
Figure 13	LCM tab	18
Figure 14	Question whether the LCM request should be deactivated	27
Figure 15	LCM History panel.....	29
Figure 16	Confirmation of deletion of a LCM request.....	30
Figure 17	Confirmation of deletion of a LCM request linked with MDS.....	30
Figure 18	Summary displayed after LCM deletion process is finished	31
Figure 19	Notification that recipient in the MDS is the same as in LCM request	32
Figure 20	Notification that MDS was already sent to recipient defined in the LCM request	32
Figure 21	Notification that the LCM request was marked to be rejected in IMDS online system	32
Figure 22	Notification that the LCM request was marked for an update in IMDS online system	33
Figure 23	Notification that MDS assigned to the LCM request does not exist in IMDS online system....	33
Figure 24	Notification that the LMC request cannot be updated in IMDS online system	34
Figure 25	LCM Parameters screen	35
Figure 26	Projects management panel.....	36
Figure 27	Error message shown on save of a project.....	39
Figure 28	Plants management panel	40
Figure 29	Error message shown on save of a plant.....	43



10 Change History

Version	Date	Description
4.0	18.05.2006	Complete revision Added extension to Rel. 4.0 Introduction to change history
4.02.002	24.07.2006	Renaming LM to LCM
4.02.003		Added request update
4.05.004	04.10.2006	Support for company internal requests Addition of search criteria Extended search result list Status update by manual MDS assignment Flowchart supplemented
5.1	25.05.2007	New symbols for easier recognition of the different status for request status, due date and IMDS state Availability of the full functionality in iPCA/IHS Allowed update of recipient data even with associated MDS
5.1.006	15.06.2007	Project specific email address for escalation Support of MDS requests from the Ford GMIR portal (optional)
5.2	13.08.2007	Updated chapter "Plants"
6.0	26.05.2008	New search criteria: ID, Requestor and MDS contact person Error codes of MDS assignment documented
6.1	25.10.2008	New parameter "Default due date" Change to iPCA
7.5	15.10.2009	Changes for release 7.5
	05.02.2010	Correct menu entries for master data and configuration
	11.03.2010	Added field "Cu.-Part-No." to search
8.01	18.03.2011	Added documentation
8.11	14.12.2011	Added documentation regarding projects
9.0	15.10.2012	Changes for release 9.0 Added MNS support
9.0	16.07.2015	Complete rework of the user manual Migration of the user manual to new iPoint style
10.25	13.08.2015	Updated big number of figures (due to change of the iPoint logo in iPCA) Fixed some typos
11.00	21.09.2015	Updated some figures and text based on the change of the wording (Development sample report MDS -> Preliminary MDS)
11.11	29.06.2016	Updated Figure 1 and renamed "Supplier no." to "Supplier code" (chapter 5.2) Added the button name "Show" and details when this button



Version	Date	Description
		label is displayed (chapters 6.3 and 6.3.1)
12.00	19.09.2016	Updated Figure 13 (chapter 6.1) Added “Delete” button (chapter 6.3) Created new chapter for “Delete” button (chapter 6.3.3) Completely reworked chapter 7.2 Updated Figure 26 (chapter 7.2)
13.00	15.12.2017	Deleted chapters 4.3 and 4.4 Added chapter 5.2.3 Updated Figure 13 and updated order of the search criteria accordingly (chapter 6.1) Removed references to GMIR as the Ford’s portal is replaced with FSP and the former processes are not valid anymore
13.00	10.07.2018	Updated Table 1 in chapter 6.2
13.25	14.01.2019	Updated names of permissions required to access “Projects” master data panel (chapter 7.2) Updated names of permissions required to access “Projects” master data panel (chapter 7.3) Extended description of chapter 7.3.3.5
13.28	01.02.2019	Field “Supplier Site Code” changed to read-only in case the customer is Volvo Car Corporation (106) (chapter 6.3.1)
14.01	10.04.2019	Updated Figure 13 (chapter 6) Added “Remark” as a new search criterion (chapter 6.1)
14.03	28.05.2019	Result list extended with remaining recipient data and some extra attributes (chapter 6.2) Added Figure 2 (chapter 5.2.1) Updated Figure 8 (chapter 5.2.3)