

# iPCA/PTS

# Program Tracking System

# Imprint

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# 1 Introduction

## 1.1 General

This document describes the functionality of the module iPCA/PTS (iPoint Compliance Agent – Program Tracking System).

## 1.2 Additional Documents

In some areas this manual has references to other iPCA manuals. These manuals are all available using the help function.

- IHS manual: The iMDS/IHS user manual
- USC manual: The SCM/USC user manual

## 2 New Functions

Version	Description
9.04	First availability
10.18	<ul style="list-style-type: none"><li>• Improved search criterion for internal customers</li><li>• <b>New search criterion “request IDs” for OEM search</b></li><li>• New comment field on component level</li></ul>

### 3 Workflow

#### 3.1 General

The module iPCA/PTS is supporting the workflow from requesting IMDS data from a business unit up to the acceptance from customer. These requests are always related to a program which is assigned to an OEM customer.

#### 3.2 Process

All customer projects are organized in programs. A program is related to a specific OEM and a vehicle. For all PPAPs required for this program IMDS data must be available. These IMDS data are requested by IMDS Coordinators and processed by IMDS Champions. All required supplier data are requested by IMDS Collectors and approved by IMDS Validators. The IMDS submissions to the customer are made by the IMDS Champions.

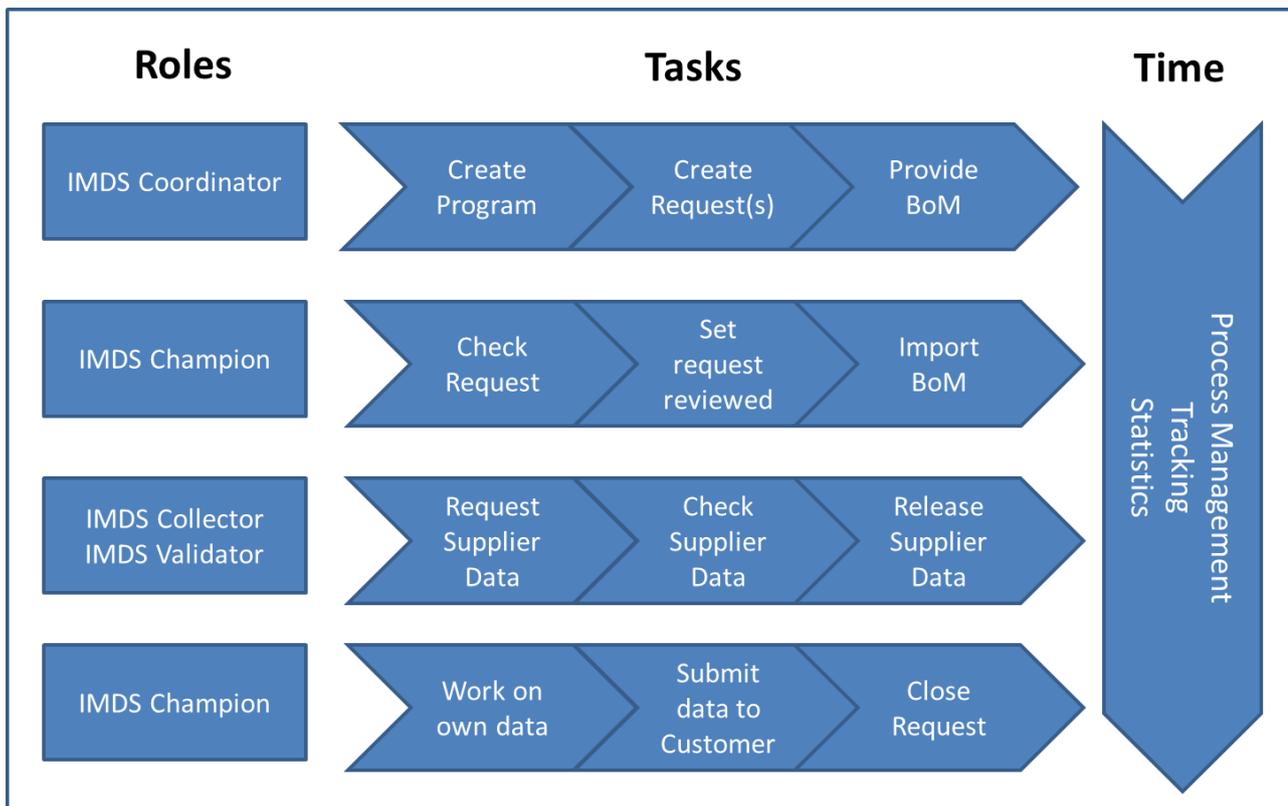


Figure 1: Process overview

## 4 Master Data

### 4.1 Plants

Plants are a special type of companies and organization units.

Therefore they can be managed using the standard master data management within the iPCA Java Client. To manage plants select

“**Extras** → Master Data → Companies / Contacts

### 4.2 Regions

Regions can be managed using standard functions of iPCA, management of master data.

### 4.3 Commodities

Commodities are preset by iPoint. For any change please contact iPoint support.

## 5 The Application

### 5.1 Login

The application will be started in the browser. The login screen will open.



Figure 2: Login Screen

Enter user name, password and select the language to use.

Following actions are available:

- Login  
Login to the application
- Reset  
Reset all entries made.

When using an invalid user name or password, an error message is shown. Please try with a valid user name and password or contact your administrator if you **don't know it**.

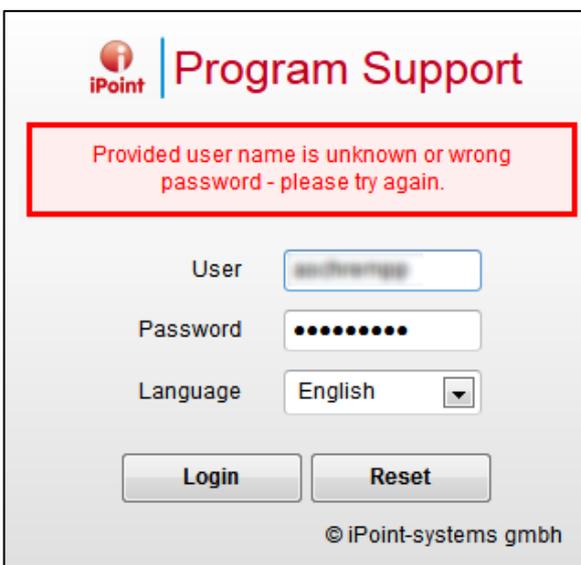


Figure 3: Login Error Message

## 5.2 General Behavior

### 5.2.1 Main Setting

Main settings are available in the upper right corner:

-  Open help screen
-  Change application language
-  Logoff from application

At the lower right corner you always find the name of the current user

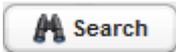
User: Andreas Schwabig (iPoint)

### 5.2.2 Searching

Whenever doing a search, following general behavior is implemented:

- Case insensitive.  
All characters entered are used for a search independent whether they are entered in lower or uppercase.
- Wildcard at the end.  
**All search strings entered are extended by the system to include a wildcard (“\*”). There is no need to enter it manually.**

At all search screens following standard actions are available

-  Start a search with given search criteria
-  Reset all search criteria to default values.

### 5.2.3 Search Result Lists

All search result lists can be modified:

- Clicking a title  
This sorts the search result list by this column. A single click sorts it descending; a second click changes the sort to ascending. Both is visualized by related icons in this column:
  -  sorted descending
  -  sorted ascending
- Grabbing a column separator  
This allows to change the width of a column.
- Select columns in search result list   
By clicking this icon on the very right in the title line of a search result list a list will open with all columns available for this search result list:



Figure 4: Search Result List: Select columns to display

Select a column with a leading bullet to hide the column.

Select a column without a bullet to add it to the search result list

At the lower right corner are icons available for standard actions of all search result lists:



Refresh screen



Export list in CSV format.

### 5.2.4 Editing

When editing data, all mandatory fields are marked with an asterisk \*

For a better overview and structure, screen areas can be folded and unfolded.

To fold a specific area just click on ▼.

To unfold an area just click on ►

## 5.3 Working Areas

### 5.3.1 My Requests

The area “My Requests” is the start screen when working with the application.

It shows all requests created by the active user.

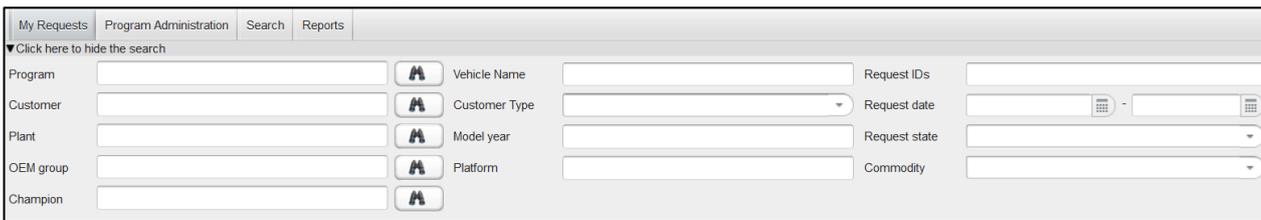


Figure 5: My Requests: search criteria

Following search criteria are available to find own requests:

- Program  
search for a program
- Vehicle Name  
Enter a vehicle name
- Request ID  
Enter a request ID
- Customer  
search for a customer name
- Internal customer

- Empty:  
Requests for internal and external customers will be searched.
- Internal  
Requests for internal customers only will be searched
- External  
Requests for external customers only will be searched
- Request date (from – to)  
Select a date range in which requests were created
- Plant  
search for a plant
- Model year  
Enter a model year
- Request state  
Select a request state from the list
- OEM group  
search for an OEM group
- Platform  
Enter a platform name
- Commodity  
Enter a commodity for which own requests are available
- Champion  
Select a champion which to whom an own request is assigned

Following actions are available

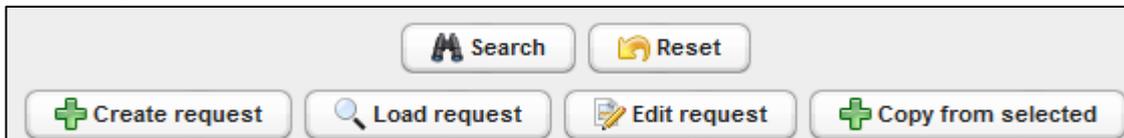


Figure 6: My Requests: available actions

- Search  
Search for own requests according the entered search criteria
- Reset  
Reset all search criteria to default values
- Create request  
Create a new request. Please refer to 5.3.1.1 “Create Requests”
- Load requests  
View the details of the selected request.
- Edit request  
Edit the selected request
- Copy from selected  
Create a new request by using the details of the selected request

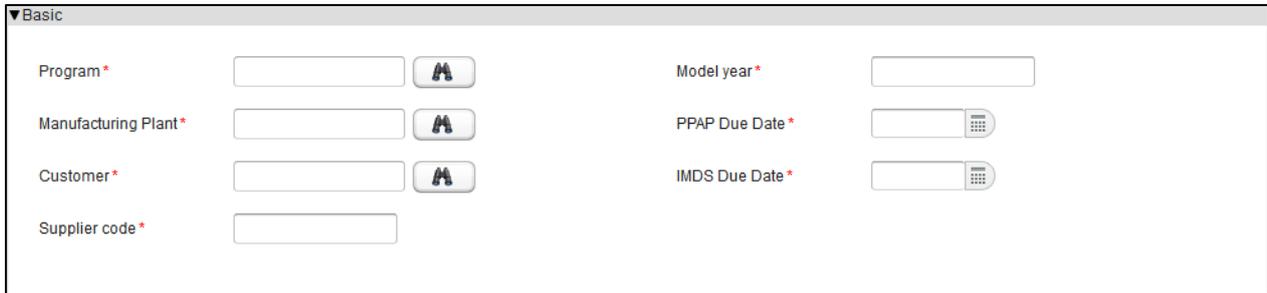
Note:

Only those buttons are active which can be used at the current state.

### 5.3.1.1 Create Requests

A request consists of several areas:

- Basic:



The screenshot shows a form titled "Basic" with the following fields:

Program *	<input type="text"/>		Model year *	<input type="text"/>
Manufacturing Plant *	<input type="text"/>		PPAP Due Date *	<input type="text"/>
Customer *	<input type="text"/>		IMDS Due Date *	<input type="text"/>
Supplier code *	<input type="text"/>			

Figure 7: Request: Area "Basic"

Following information must be entered:

- Program  
Select a program to which the new request will be assigned. Please refer to chapter 5.3.3.1.2 "Add a Program" for further details.
  - Model Year  
Enter the model year of the vehicle of this request
  - Manufacturing Plant  
Select the plant for all assemblies of this request
  - PPAP Due Date  
Enter the due date of the PPAP or select it from the calendar
  - Customer  
Select the customer to which the IMDS datasheets must be submitted.
  - IMDS due date  
Enter the due date for the IMDS submissions or select it from the calendar
  - Supplier Code  
Enter the supplier code to be used for all assemblies in this request
- Team



The screenshot shows a form titled "Team" with the following fields:

Program manager *	<input type="text"/>	IMDS coordinator *	<input type="text"/>
Purchasing responsible *	<input type="text"/>	Product engineer *	<input type="text"/>
Quality responsible *	<input type="text"/>	BOM responsible *	<input type="text"/>

Figure 8: Request Area "Team"

This area is to manage all contacts related to the request. For every role a name or email address must be entered.

It is **recommended to enter the names in format "last name, first name"**.

- BoM files



Figure 9: Request Area "BoM files"

This area is to manage all BoM files. The list will show all files uploaded.

If multiple BoMs should be uploaded it might be useful to zip them first and upload a zip file.

Note:

This function will only upload the BoM files for further treatment. There will be no import of the files to create data!

Following functions are available:



Select a BoM file and save it for the request



Delete the selected BoM file from the list  
This must be confirmed:

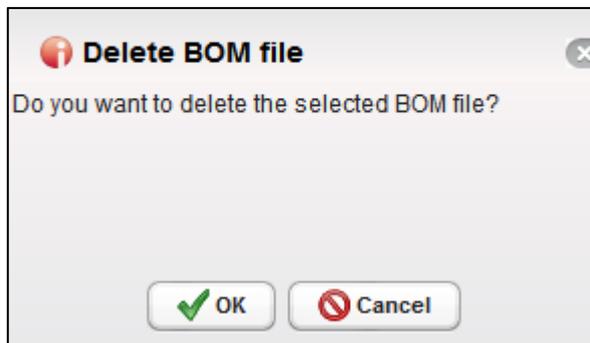


Figure 10: Confirm to delete a BoM file



Open a BoM file for review



Add a comment for the selected BoM file.



Refresh the file list



Export the file list as csv file

- Assemblies

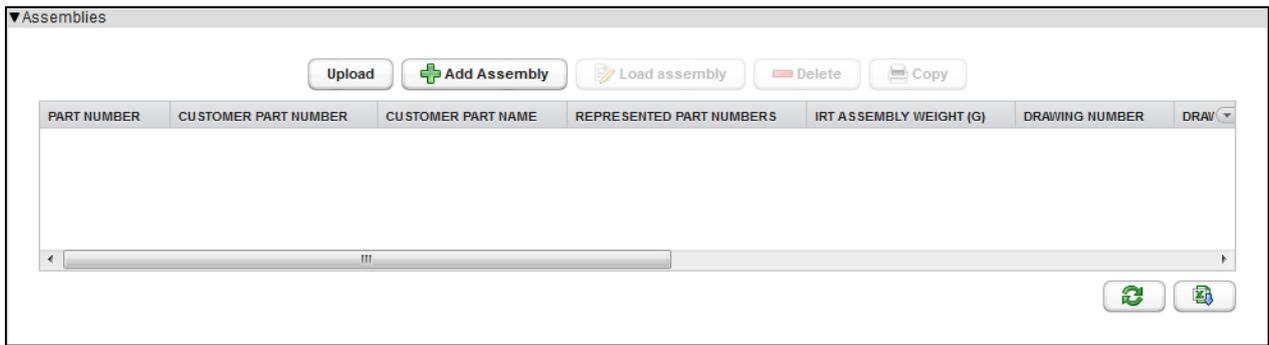


Figure 11: Request Area "Assemblies"

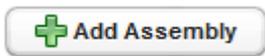
This area lists all assemblies for this request.

Assemblies can be managed manually or created by importing a BoM file.

Following functions are available:



Upload a list of assembly numbers using an Excel template file. Please refer to chapter 6.1 "Assembly list" for the file format.



Add manually an assembly  
A screen will open to manually add an assembly. See 5.3.1.2 "Add Assembly" for further details.



Edit the details for the selected assembly.  
A screen to edit assembly details will open. See 5.3.1.2 "Add Assembly" for further details.



Delete the selected assembly.  
This must be confirmed:



Figure 12: Confirm to delete an assembly



Copy the selected assembly

### 5.3.1.2 Add Assembly

To add an assembly, following information must be entered:

Figure 13: Add assembly

- Part number  
The internal own part number
- Plant Part Weight (g)  
The measured weight of the part in Gram
- Customer part number  
The part number from the customer
- Drawing number  
The drawing number
- Customer part name  
The name of the part
- Drawing change level  
The drawing change level of the part
- Represented part numbers  
Additional part numbers for an assembly can be added:

Figure 14: Manage represented numbers for an assembly

Following functions are available:



Add the entered number to the list.  
Attention: A number can be added only once. If the number is already in the list it will not be added.



The selected part number will be deleted from the list



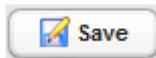
Save the list and close the window



Close the window without saving the changes

- Drawing date  
The date of the drawing
- Renault part index  
The Renault index of the part (if for Renault)
- Email of designer  
The email of the designer (if for Renault)
- MACSI datasheet number  
The number of the requested MACSI datasheet (if for PSA)

At the add assembly screen following actions are available:



Save the entries and close the window.



Reset all entries



The window will be closed without saving the entries.

### 5.3.2 Program Administration

#### 5.3.2.1 All Requests

This area provides a complete overview of requests independent from their state.

REQUEST ID	REQUEST STATE	PROGRAM NAME	MODEL YEAR	CUSTOMER	REQUEST DATE	PLATFORM	VEHICLE NAME	OEM GROUP	PLANT	COMMODITY	REGION	REQUESTOR	CHAMPION	SUPPLIER CODE	BDI
10100	Approved	Seat Cup	2014	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	Europe	Active Seating of France		10100	2014
10101	Approved	Seat Cup	2014	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	Europe	Active Seating of France		10101	2014
10102	Approved	Seat Cup 2013-15	2014	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10102	2014
10103	Completed	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10103	2014
10104	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10104	2014
10105	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10105	2014
10106	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10106	2014
10107	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10107	2014
10108	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10108	2014
10109	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10109	2014
10110	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10110	2014
10111	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10111	2014
10112	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10112	2014
10113	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10113	2014
10114	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10114	2014
10115	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10115	2014
10116	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10116	2014
10117	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10117	2014
10118	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10118	2014
10119	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10119	2014
10120	Approved	Seat Cup 2013-15	2013	SEAT - Group España	20140528	SE	Seat Cup	Volkswagen AG	Regensburg	Seating	North America	India-Active Seat System		10120	2014

Figure 15: Search all requests

Following search criteria are available:

- Program
  - A program name
- Vehicle Name
  - The name of a vehicle
- Request ID
  - The ID of a request
- Customer
  - The name of a customer
- Internal customer
  - Empty:
    - Requests for internal and external customers will be searched.
  - Internal
    - Requests for internal customers only will be searched
  - External
    - Requests for external customers only will be searched
- Request date
  - The date a request was created (from – to)
- Plant
  - The plant name
- Model Year
  - The model year of the request
- Request state
  - The current state of a request
  - Following states are available
    - New
      - A new created request
    - Updated
      - A new and changed request
    - Returned
      - A request which has not been accepted and must be updated
    - Reviewed
      - A request which was approved and accepted
    - In Process
      - A request which is currently in process
    - Completed
      - A request for which all assemblies are accepted by the customer
- OEM group
  - The name of the OEM group
- Platform
  - The name of the platform
- Commodity
  - select a commodity

- Champion  
An assigned champion
- Requestor  
The name of a requestor
- Regions  
Select a region

Following actions are available for the search results:

	Accept a request for processing. <b>The request will then be shown in “active requests”. Please refer to chapter 5.3.2.2 “Active Requests” for further details.</b>
	Reject a request if it is incomplete or incorrect
	View the details of a request to verify. Please refer to chapter 5.3.3.7.2 “Request Details” for further details.
	Delete a request. The delete action must be confirmed.

### 5.3.2.2 Active Requests

This area provides the information about all requests which are currently processed.

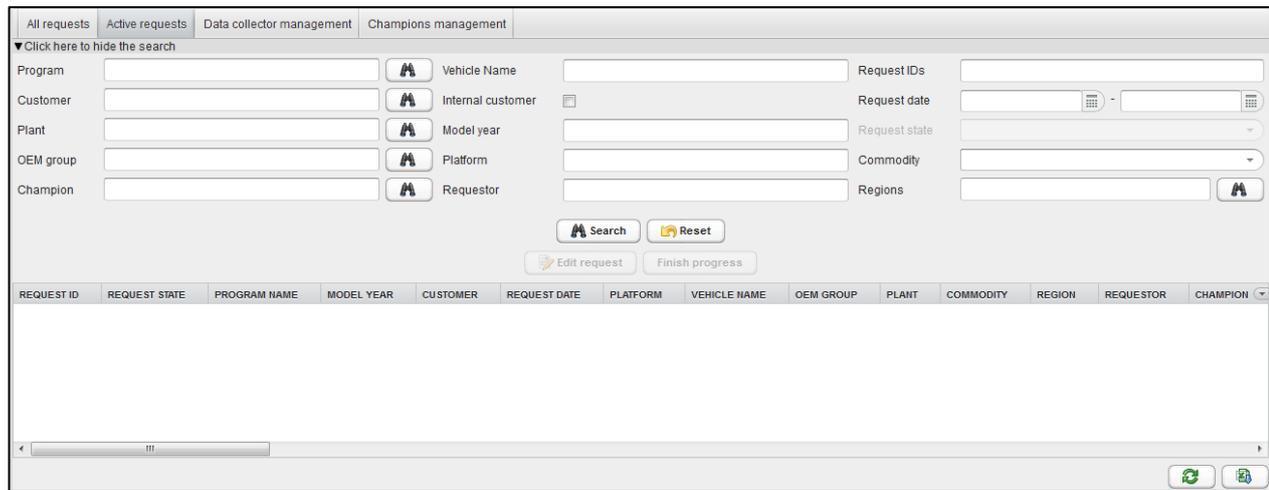


Figure 16: Search active requests

This screen provides the same search criteria as described in chapter 5.3.2.1 “All Requests”

Following actions are available:

	Edit request. The structure is the same as described in chapter 5.3.1.1 “Create Requests” with following differences: <ul style="list-style-type: none"> <li>• Area basic Also a champion can be selected and assigned</li> </ul>
--	--

- Area BoM Files  
This area is extended to enable the import of BoM files to create assemblies. For further details please refer to chapter 5.3.2.2.1 “Edit Requests BoM File Area”.

**Finish progress**

Set a request completed even not all assemblies are accepted by the customer.

### 5.3.2.2.1 Edit Requests BoM File Area

With these functions, BoM files can be imported to create assemblies.

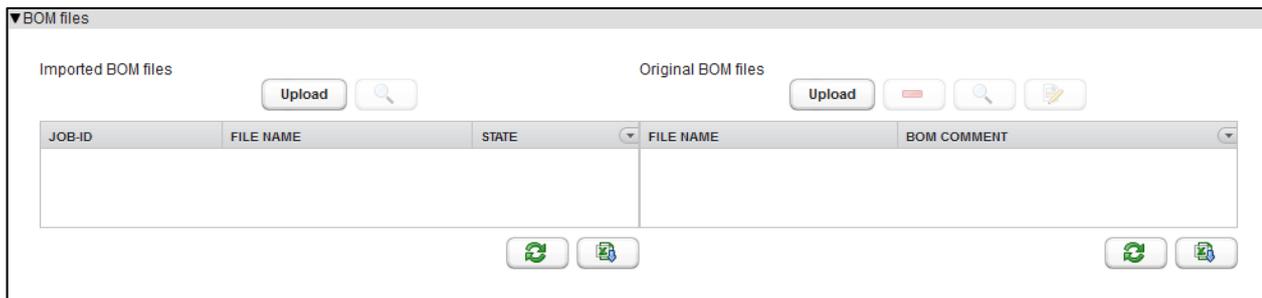


Figure 17: Edit Requests, BoM File Area

This area is divided into two sub areas:

- Left Area: BoM Import (to create assemblies)  
This area is to import BoM into the application to create assemblies and the related datasheets.

Following functions are available:

**Upload**

Upload a BoM file. The selected file will be loaded and a pop up confirms this with the job ID used to process the import. The file must follow the format description as shown in chapter 6.2 “BoM Import Format”



View the log information of the import process

The list of imported BoM files holds following information:

- Job-ID  
The Job ID which was used when importing the file
- File name  
The name of the BoM file
- State  
The state of the import process. Following states are available
  - Open  
The process is queued to the Job Manager and will be processed
  - Successful  
The BoM file was imported successfully.
  - Error  
The BoM file could not be imported. Reasons for the failure are documented in the log information.

- Right Area: BoM Upload (to store information at request for further process)  
This function is as described in chapter 5.3.1.1 “Create Requests”

### 5.3.2.3 Data Collector Management

A data collector is a user which has a region and supplier assigned.

The data collector management is made to assign regions and supplier to users.

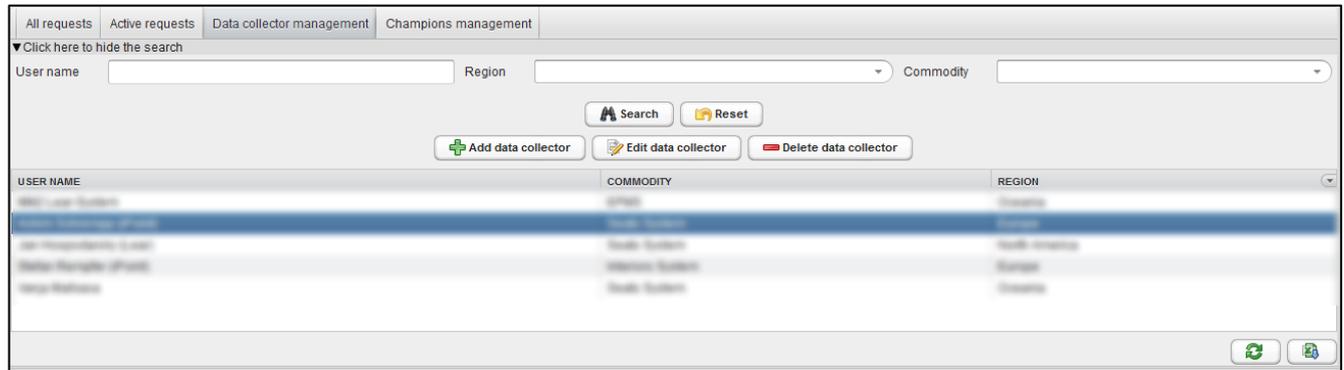


Figure 18: Data Collector Management

Following search criteria are available:

- User name  
A name of a user to edit
- Region  
A region of a data collector
- Commodity  
A commodity of a data collector

The result list will show a list of users and the assigned region /commodity

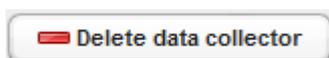
Following actions are available:



A panel to add a data collector will open  
See chapter 5.3.2.3.1 “Add a Data Collector” for details.



This will open a panel to define a commodity, region and suppliers for a data collector. The screen is the same as in chapter 5.3.2.3.1 “Add a Data Collector”



This will delete the selected data collector. This action must be confirmed.

#### 5.3.2.3.1 Add a Data Collector

This screen is used to define the assigned commodity, region and suppliers for a data collector.

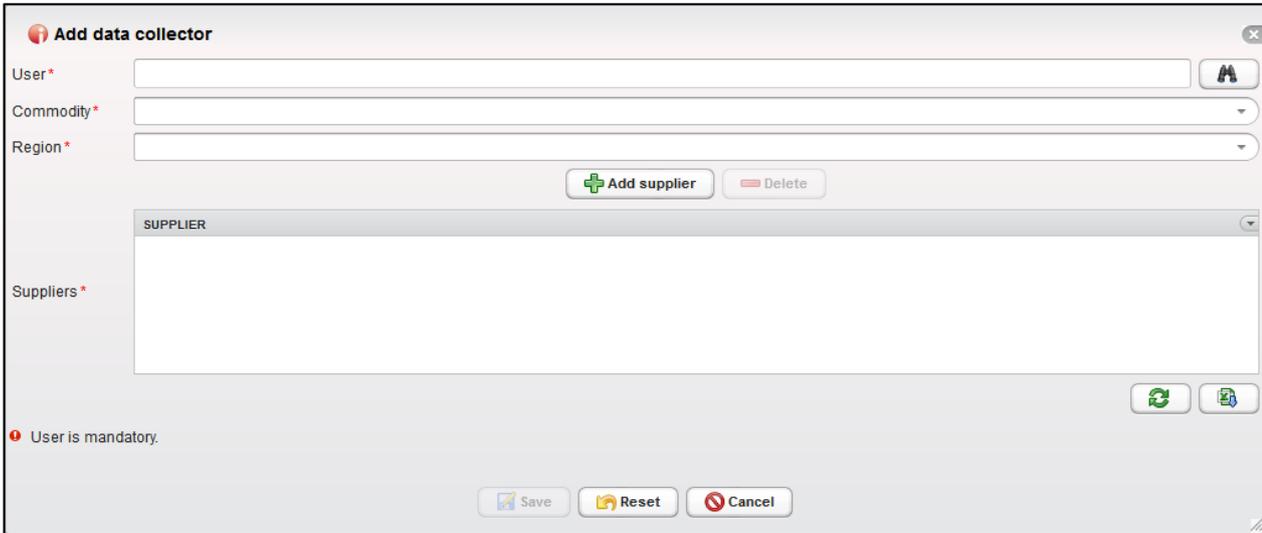


Figure 19: Define settings for a data collector

Following functions are available

- User  
Select a user from a list
- Commodity  
Select a commodity for the data collector
- Region:  
Select the region for the data collector
- Supplier  
The list shows already assigned supplier.



Open a screen to search and add a supplier.



Delete the selected supplier from the list

Following actions are available:



Save all changes and close window



Undo all changes



Close window without saving the changes

### 5.3.2.3.2 Edit a Data Collector

To change the data collector settings for a user select the entry in the search result list and click on **“edit user” to change the data collector settings.**

The following screen is the same as described in chapter 5.3.2.3.1 “Add a Data Collector”.

### 5.3.2.4 Champions Management

A Champion is a user which has assigned

- A commodity
- a region
- Customer(s)

The champion management is made to assign these values to users.

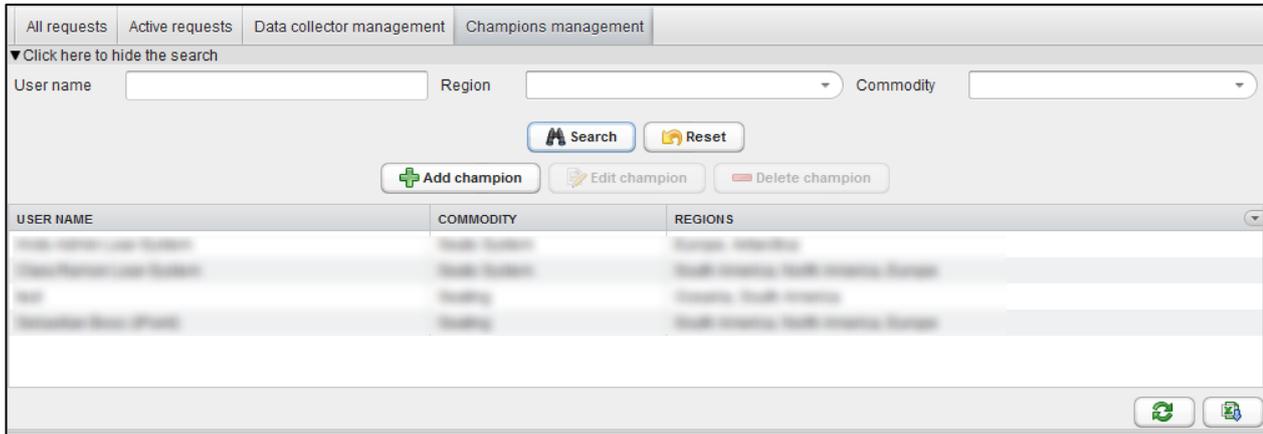


Figure 20: Champion Management

Following search criteria are available:

- User name  
A name of a user to edit
- Region  
a region of a Champion
- Commodity  
a commodity of a Champion

The result list will show a list of users and the assigned region.

Following actions are available:



A panel to add a champion will open  
See chapter 5.3.2.4.1 “Add a Champion” **for details.**



This will open a panel to define a commodity, region and customers for a champion. The screen is the same as in chapter 5.3.2.4.2 “Edit a Champion”.



This will delete the selected champion.. This action must be confirmed.

### 5.3.2.4.1 Add a Champion

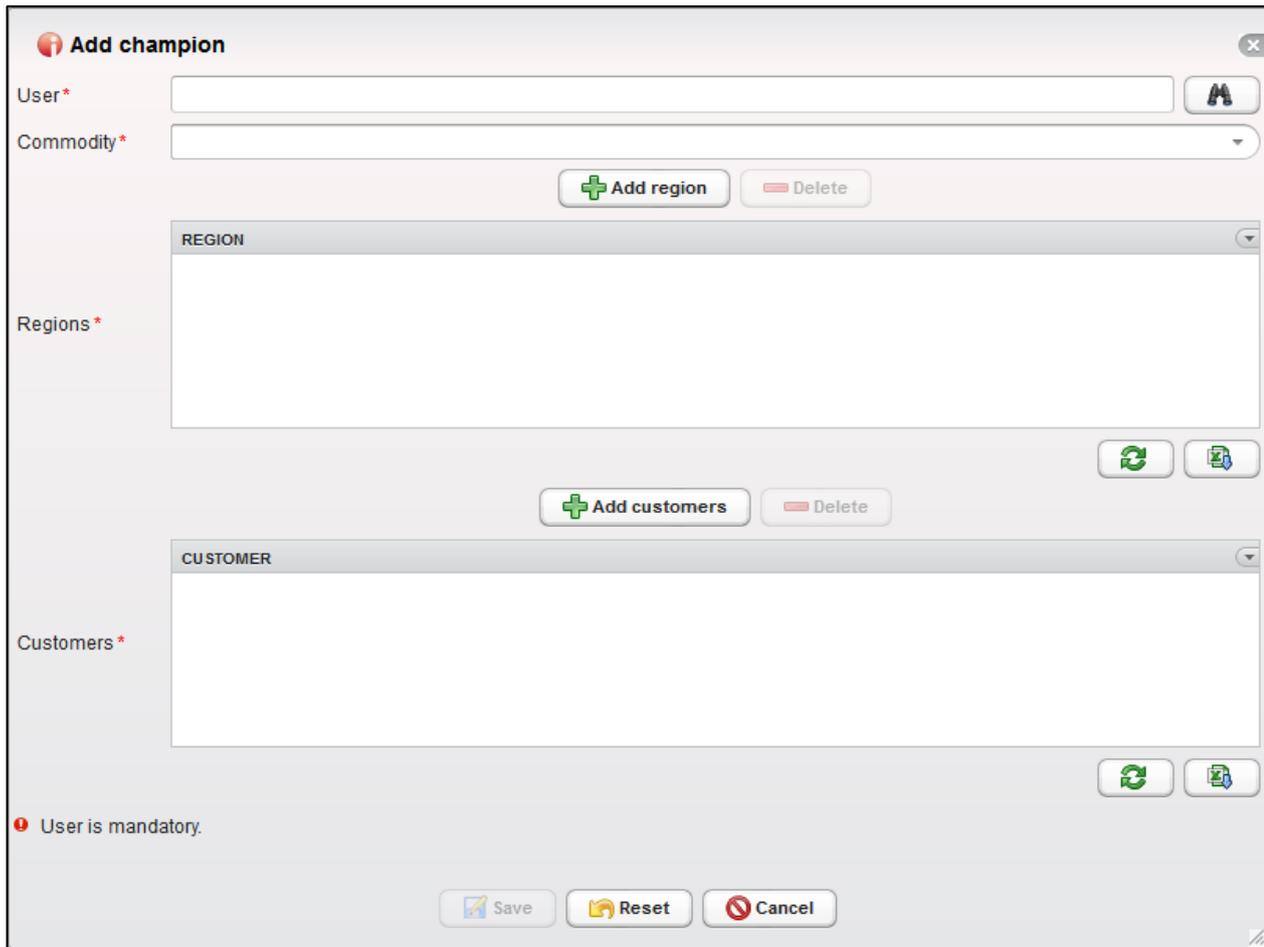


Figure 21: Define a champion

Following functions are available

- User  
Search the user for which champion details will be assigned.
- Commodity:  
Select the commodity for the Champion
- Region  
The list shows already assigned regions.  
 Open a screen to search and add a region.  
 Delete the selected region from the list
- Customer  
The list shows already assigned customers.  
 Open a screen to search and add a customer.  
 Delete the selected customer from the list

Following actions are available:



Save all changes and close window



Undo all changes



Close window without saving the changes

### 5.3.2.4.2 Edit a Champion

To change the champion settings for a user select the entry in the search result list and click on **“edit user”** to change the champions settings.

The following screen is the same as described in chapter 5.3.2.4.1 “Add a Champion”.

## 5.3.3 Search

### 5.3.3.1 Program

#### 5.3.3.1.1 Program Search

This area is to find and edit specific programs

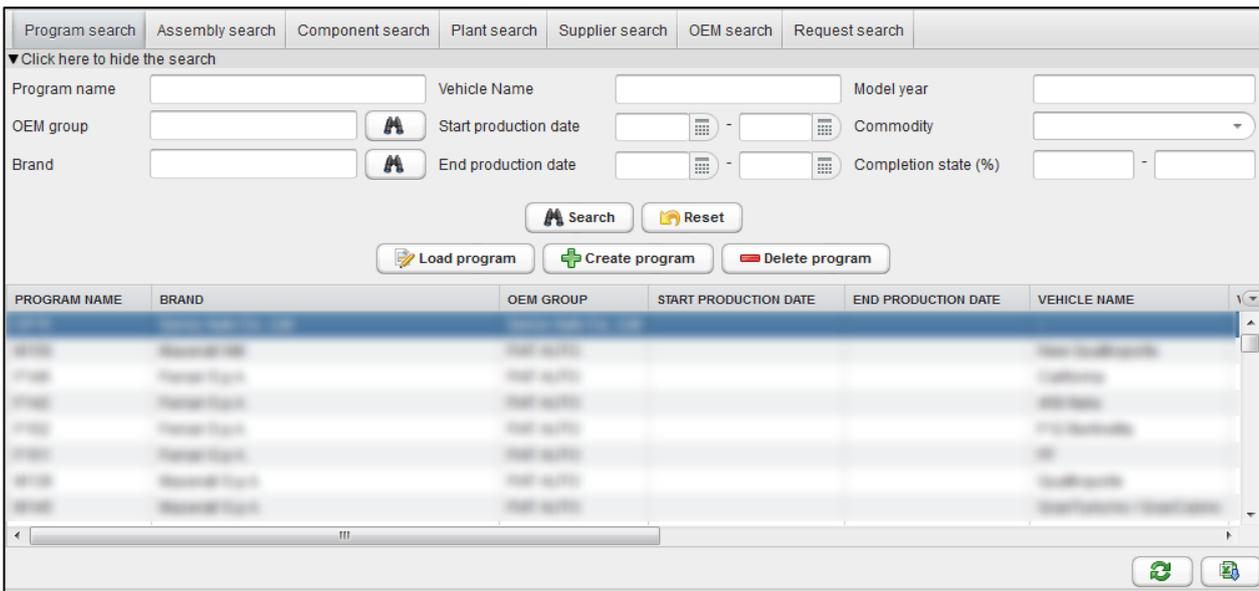


Figure 22: search for programs

Following search criteria are available:

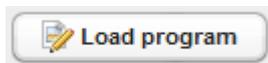
- Program name  
The name of the program
- Vehicle name  
The name of the vehicle
- Model year  
The model year of the vehicle of the program
- OEM group  
Select the name of the related OEM group
- Start production date (SOP)  
A timeframe (from – to) for SOP of the program

- Commodity  
Select the name of the assigned commodity
- Brand  
Select the brand of the program
- End production date (EOP)  
A timeframe (from – to) for EOP of the program
- Completion state (%)  
The completion state of the assemblies of the program

Following functions are available:



Create a new program.  
Please refer to chapter 5.3.3.1.2 “Add a Program” for details.



Edit the selected program.  
The functionality of the program detail screen is identical to chapter 5.3.3.1.2 “Add a Program”.



Delete the selected program. This action must be confirmed.

### 5.3.3.1.2 Add a Program

To add a program, following information must be entered:

The screenshot shows a 'New program' dialog box with the following fields and controls:

- Program name \* (text input)
- Vehicle Name (text input)
- OEM group \* (text input with dropdown arrow)
- Vehicle code (text input)
- Brand (text input with dropdown arrow)
- Start production date \* (calendar icon)
- End production date \* (calendar icon)
- Message: Program name is mandatory.
- Buttons: Save, Reset, Cancel

Figure 23: Program details

- Program name  
A meaningful name for the program
- Vehicle Name  
The vehicle name of the program
- OEM Group  
Select the OEM group
- Vehicle Code  
The internal vehicle code
- Brand  
Select the brand

- Start production date (SOP)  
Select or enter the SOP of the program
- Platform  
The name of the platform
- End production date (EOP)  
Select or enter the EOP of the program

### 5.3.3.1.3 Edit a Program

The edit program screen is divided into multiple areas:

- Program details  
Please see chapter 5.3.3.1.2 “Add a Program” for details.
- Request overview

Requests								
Load request								
REQUEST ID	CUSTOMER	REQUEST DATE	PLANT	STATE	REQUESTOR	CHAMPION	OEM GROUP	SUPPLIER CODE
10001		2019-10-01 10:00:00		In progress				10001
10002		2019-10-01 10:00:00		In progress				10002
10003		2019-10-01 10:00:00		Released				10003
10004		2019-10-01 10:00:00		In progress				10004

Figure 24: list of requests for a program

- Below the request overview area, all assemblies of the program are listed.

Assemblies						
Load assembly						
CUSTOMER PART NUMBER	PART NUMBER	PART NAME	REPRESENTED PART NUMBERS	ASSEMBLY SUBMITTED	DATE SUBMITTED	
cust part no	TC-001-Assembly	my part name				
	TC-002					
	TC-003-Assembly					
Test	Test	Test				

Figure 25: list of assemblies for a program

- The last section lists all components for the program.

Components			
Load component			
COMPANY-/ORGUNIT-ID	SUPPLIER PART NUMBER	PART NAME	COMPONENT NUMB
...	...	CONTROL UNIT WITH...	
...	...	BATTERY...	
...	...	2 Way Power Passage 12	
...	...	40 Frame Front Load...	
...	...	4 Way Manual Passage 12	
...	...	40 Frame Front Load...	
...	...	2011...	
...	...	...	
...	...	...	
...	...	2 Way Power Drive 12	
...	...	CONTROL UNIT WITH...	
...	...	2 Way Power Passage 12 with...	
...	...	40 Frame Front Load...	

Figure 26: list of components for a program

In all lists, an entry can be selected to view the details:



View the details of a request.  
See chapter 5.3.1.1 “Create Requests” **for details**



View the details of an assembly.  
See chapter 5.3.3.2.2 “Assembly Details” **for further details.**



View the details of a selected component.  
See chapter 5.3.3.3.2 “Component Details” **for further details**

### 5.3.3.2 Assembly

#### 5.3.3.2.1 Assembly Search

This area is to find assemblies and related information.

Program search
Assembly search
Component search
Plant search
Supplier search
OEM search
Request search

▼ Click here to hide the search

**Standard search**

Customer part number  Part number  Part name

► Extended search

Search Reset

Load assembly

CUSTOMER PART NUMBER	PART NUMBER	PART NAME	REPRESENTED PART NUMBERS	ASSEMBLY SUBMITTED	DATE SUBMITTED	DATE BOM RECEIVED	SUBMISSIC

Refresh Print

Figure 27: search for assemblies

Following search criteria are available:

- Customer part number  
The part number from the customer
- Part number  
The own part number
- Part name  
The name of the part

The area extended search provides following search criteria:

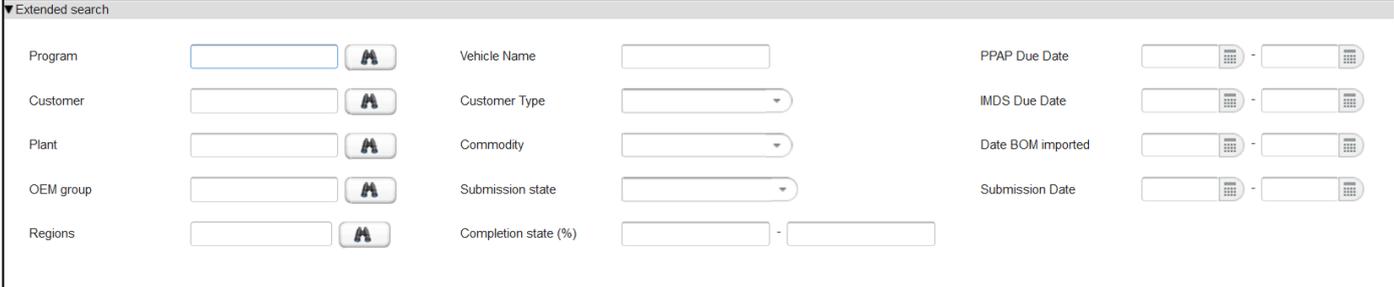


Figure 28: search for assemblies, extended search criteria

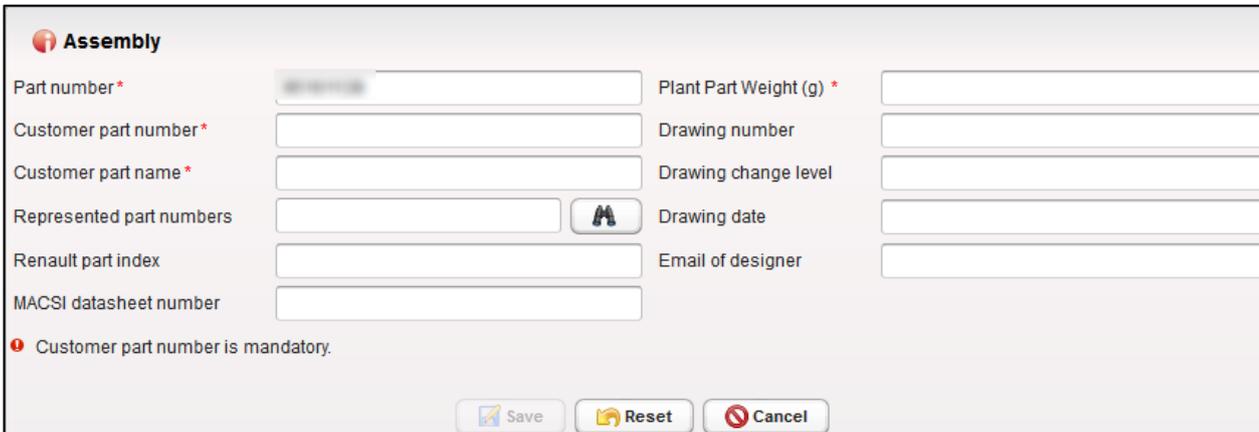
- Program  
the program where the assembly is used
- Vehicle name  
The vehicle name of the related program
- PPAP due date  
A timeframe (from – to) for PPAP of the request
- Customer  
The customer of the request
- Internal customer
  - Empty:  
Assemblies within requests for internal and external customers will be searched.
  - Internal  
Assemblies within requests for internal customers only will be searched
  - External  
Assemblies within requests for external customers only will be searched
- IMDS due date  
A timeframe (from – to) for IMDS due date of the request
- Plant  
The plant of the request
- Commodity  
the commodity of the request
- BOM received date  
A timeframe (from – to) for BoM file of the request
- OEM group  
The OEM group of the program
- Submission state  
select a submission date of the assemblies to find:

- Edited
- Unread
- Read
- Accepted
- Rejected
- Modified
- Cancelled by sender
- In progress by the receiver
- New (not yet submitted)
- Submission date  
A timeframe (from – to) for the submission date of the assembly
- Regions  
The region of the plant
- Completion status (%)  
A range (from – to) for the completion of the assembly.

From the result list, an assembly can be opened to see all details. Please refer to chapter 5.3.3.2.2 “Assembly Details”.

#### 5.3.3.2.2 Assembly Details

By this screen, all assembly details can be reviewed and even changed if the user has the appropriate privileges.



**Assembly**

Part number*	<input type="text"/>	Plant Part Weight (g) *	<input type="text"/>	
Customer part number *	<input type="text"/>	Drawing number	<input type="text"/>	
Customer part name *	<input type="text"/>	Drawing change level	<input type="text"/>	
Represented part numbers	<input type="text"/>	<input type="button" value="A"/>	Drawing date	<input type="text"/>
Renault part index	<input type="text"/>	Email of designer	<input type="text"/>	
MACSI datasheet number	<input type="text"/>			

❗ Customer part number is mandatory.

Figure 29: Assembly details

Following data can be viewed/edited:

- Part number  
The internal number of the assembly
- Plant part Weight (g)  
The weight of the assembly in Gram
- Customer part number  
The number of this assembly at the customer
- Drawing number  
The drawing number of this assembly

- Customer part name  
The name of this assembly at the customer
- Drawing change level  
The drawing change level of this assembly
- Represented part number  
Maintain additional part numbers for this assembly. For details please refer to Figure 14: Manage represented numbers for an assembly
- Drawing date  
The date of the drawing for this assembly
- Renault Part Index  
The index of the assembly (if the customer is Renault)
- Email of designer  
The email address of the designer (if the customer is Renault)
- MACSI datasheet number  
The name of the MACSI datasheet (if the customer is PSA)

Below these assembly details, following areas are available:

- List of components for this assembly

Figure 30: Component list for assembly

- List of programs where the assembly is used

Figure 31: Program list for assembly

In all lists, an entry can be selected to view the details:



View the details of a selected component.  
See chapter 5.3.3.3.2 “Component Details” **for further details.**



View the details of a program.  
See chapter 5.3.3.1.3 “Edit a Program” for further details.

### 5.3.3.3 Components

#### 5.3.3.3.1 Component Search

This area is to find components.

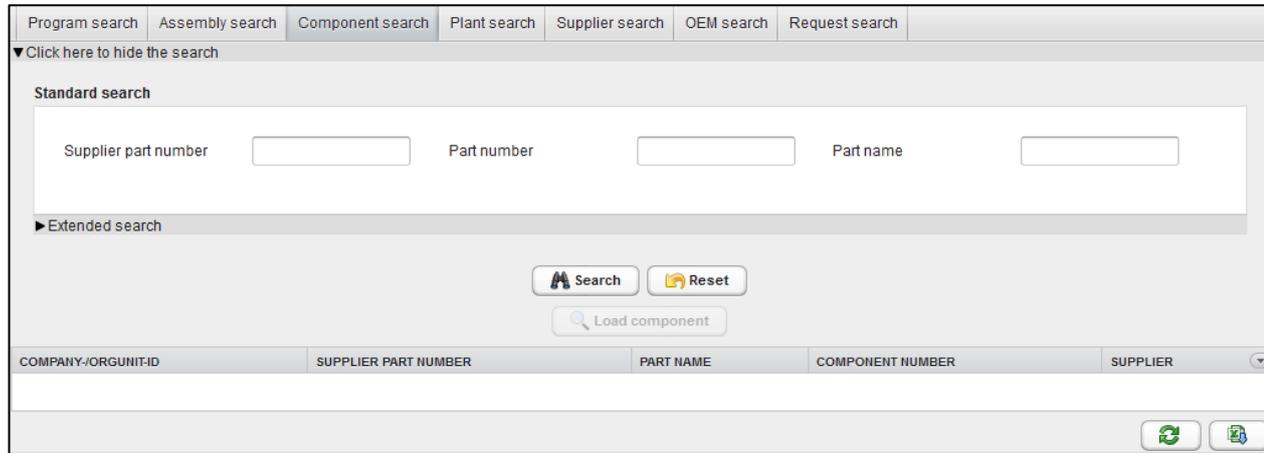


Figure 32: search for components

Following search criteria are available:

- Supplier part number  
The component number at the supplier
- Part number  
The internal number for the component
- Part name  
The internal name for the component

The area extended search provides following search criteria:



Figure 33: search for components, extended search criteria

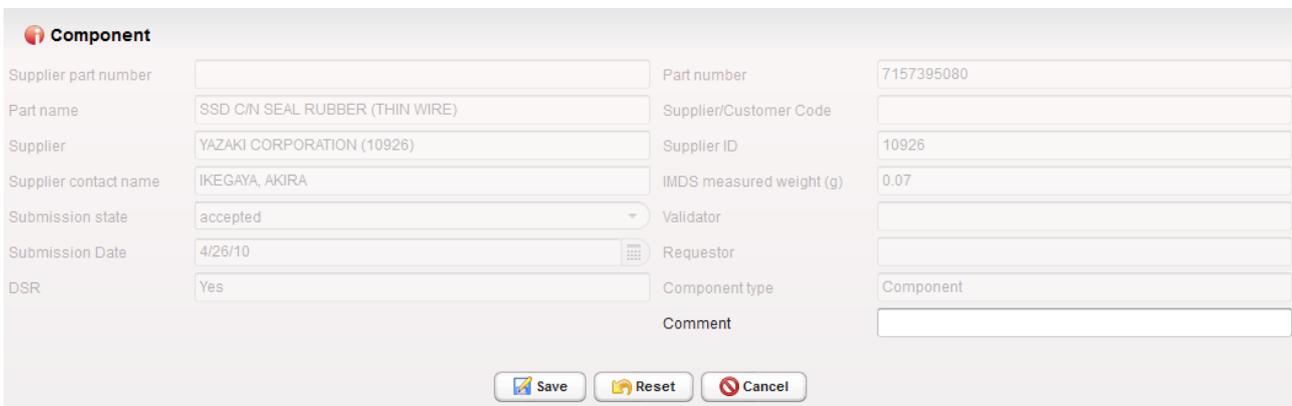
- Program  
the program where the component is used
- Vehicle name  
The vehicle name of the related program
- IMDS due date  
A timeframe (from – to) for IMDS date of the related request
- Customer  
The customer of the request
- Plant  
The plant of the request

- Submission date  
A timeframe (from – to) for the submission date of the component
- Regions  
The region of the plant
- OEM group  
The OEM group of the program
- Commodity  
the commodity of the request
- Supplier  
The supplier of the component
- IMDS Data Collector  
The name of the assigned IMDS Data Collector
- Submission state  
The submission state of the component

From the result list, a component can be opened to see all details. Please refer to chapter 5.3.3.2 “Assembly Details”.

#### 5.3.3.3.2 Component Details

By this screen, all component details can be reviewed:



Component	
Supplier part number	Part number: 7157395080
Part name: SSD C/N SEAL RUBBER (THIN WIRE)	Supplier/Customer Code
Supplier: YAZAKI CORPORATION (10926)	Supplier ID: 10926
Supplier contact name: IKEGAYA, AKIRA	IMDS measured weight (g): 0.07
Submission state: accepted	Validator
Submission Date: 4/26/10	Requestor
DSR: Yes	Component type: Component
Comment	

Buttons: Save, Reset, Cancel

Figure 34: Component Details

Following data can be viewed:

- Supplier part number  
The number of the component at the supplier
- Part number  
The internal number for this component
- Part name  
The name of the component
- Supplier/Customer Code  
The supplier code for the component supplier
- Supplier  
The name of the supplier

- Supplier ID  
The IMDS ID of the supplier
- Supplier contact name  
The contact from the related IMDS submission
- IMDS measured weight (g)  
The weight in Gram of the related IMDS submission
- Submission state  
The submission state of the related component
- Requestor  
The name of the requestor of this component (if available)
- DSR  
Information about the development sample flag of the related submission
- Component type  
Information about the node type of the related submission (component, semicomponent, material)
- Comment:  
Here comments related to this component can be added/edited.

Actions possible:

- Save  
Save changed/added comments
- Reset  
Reset changes made to the comment
- Cancel  
Close without saving changes

Below these component details, following areas are available:

- List of assemblies for this component

CUSTOMER PART NUMBER	PART NUMBER	CUSTOMER PART NAME	REPRESENTED PART NUMBERS	ASSEMBLY SUBMITTED	DATE SUBMITTED

Figure 35: Assembly list for component

- List of programs where the component is used

PROGRAM NAME	BRAND	OEM GROUP	START PRODUCTION DATE	END PRODUCTION DATE	VEHICLE NAME	VEHICLE CODE	PLATFORM	TOTAL PARTS
16 Test Program	Peugeot	1600000000	2015	2015	Peugeot	160	Peugeot	160

Figure 36: Program list for component

In all lists, an entry can be selected to view the details:



View the details of a selected assembly.

See chapter 5.3.3.2.2 “Assembly Details” **for further details.**



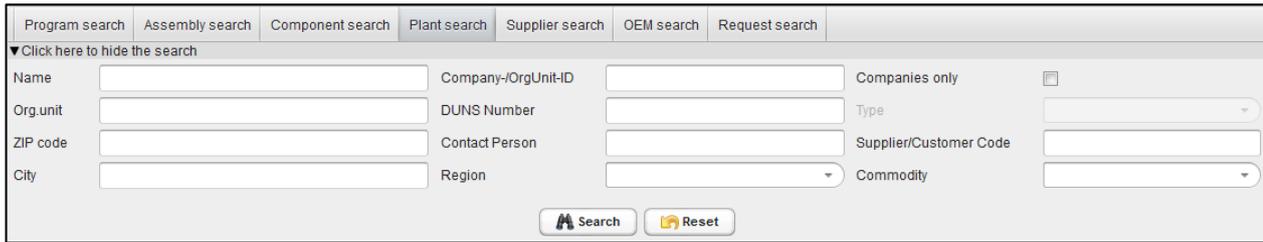
View the details of a program.

See chapter 5.3.3.1.3 “Edit a Program” **for further details.**

### 5.3.3.4 Plants

#### 5.3.3.4.1 Plant Search

This area is to find plants.



The screenshot shows a search interface with tabs for Program search, Assembly search, Component search, Plant search (selected), Supplier search, OEM search, and Request search. Below the tabs is a search form with the following fields:

- Name: text input
- Company-/OrgUnit-ID: text input
- Companies only: checkbox
- Org.unit: text input
- DUNS Number: text input
- Type: dropdown menu
- ZIP code: text input
- Contact Person: text input
- Supplier/Customer Code: text input
- City: text input
- Region: dropdown menu
- Commodity: dropdown menu

At the bottom of the form are Search and Reset buttons.

Figure 37: Search for plants

Following search criteria are available:

- Name  
The company name where the plant belongs to
- Company-/OrgUnit-ID  
The ID of the plant
- Companies only  
Select to list just companies
- Org unit  
The name of the plant
- DUNS Number  
The DUNS number of the plant
- ZIP Code  
The ZIP Code of the plant
- Contact person  
A contact of the company from which the plant is
- Supplier/customer code  
An assigned supplier/customer code to the plant
- City  
The city of the plant
- Region  
The region of the plant
- Commodity  
The commodity of the plant

From the result list, a plant can be opened to see all details. Please refer to chapter 5.3.3.4.2 “Plant Details”.

### 5.3.3.4.2 Plant Details

By this screen, all plant details can be reviewed:

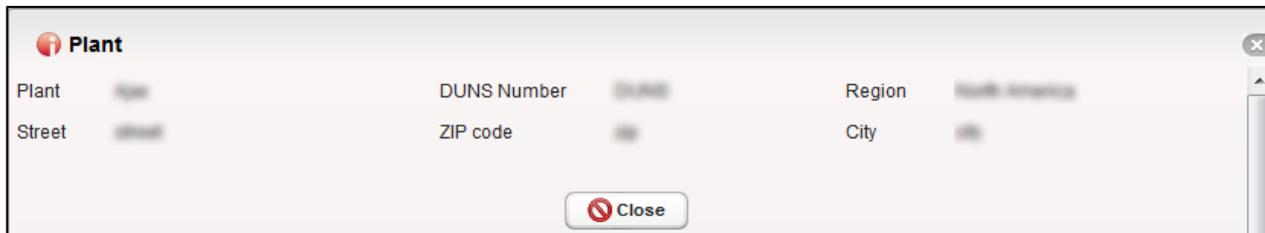


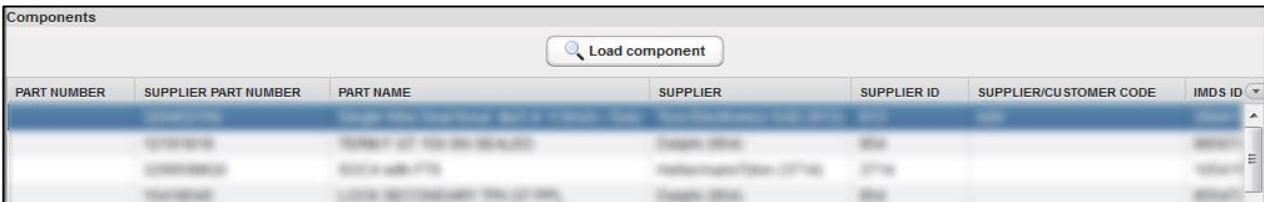
Figure 38: Plant Details

Following data can be viewed:

- Plant  
Plant name
- DUNS Number  
The DUNS code assigned to a plant
- Region  
The region assigned to a plant
- Street  
The street of the plant
- ZIP Code  
The ZIP code of the plant
- City  
The city of the plant.

Below these plant details, following areas are available:

- List of components for this plant



PART NUMBER	SUPPLIER PART NUMBER	PART NAME	SUPPLIER	SUPPLIER ID	SUPPLIER/CUSTOMER CODE	IMDS ID

Figure 39: Component list for a plant

In all lists, an entry can be selected to view the details:



View the details of a selected component.

See chapter 5.3.3.3.2 “Component Details” **for further details.**

### 5.3.3.5 Supplier

#### 5.3.3.5.1 Supplier Search

This area is to find supplier.

Figure 40: Search for supplier

Following search criteria are available:

- Name  
The company name where the plant belongs to
- Company-/OrgUnit-ID  
The ID of the plant
- Companies only  
Select to list just companies
- Org unit  
The name of the plant
- DUNS Number  
The DUNS number of the plant
- ZIP Code  
The ZIP Code of the plant
- Contact person  
A contact of the company from which the plant is
- Supplier/customer code  
An assigned supplier/customer code to the plant
- City  
The city of the plant

From the result list, a Supplier can be opened to see all details. Please refer to chapter 5.3.3.5.2 “Supplier Details” for further details.

#### 5.3.3.5.2 Supplier Details

By this screen, all supplier details can be reviewed:

Figure 41: Supplier Details

Following data can be viewed:

- Plant  
The plant name
- DUNS Number  
The DUNS number of the plant
- Region  
The region of the plant
- Street  
The street name of the plant
- ZIP Code  
The ZIP Code of the plant
- City  
The city of the plant

### 5.3.3.6 OEM

#### 5.3.3.6.1 OEM search

This area is to find OEM.

Note:

Only those OEMs will be found for which at least one program with one request is available.



Figure 42: Search for OEM

Following search criteria are available:

- Name  
The company name of the OEM
- Company-/OrgUnit-ID  
The ID of the OEM
- Companies only  
Select to list just companies
- Org unit  
The name of the Brand
- DUNS Number  
The DUNS number of the OEM
- ZIP Code  
The ZIP Code of the OEM
- Contact person  
A contact of the OEM company

- Supplier/customer code  
An assigned supplier/customer code to the OEM
- City  
The city of the OEM
- Region  
The region of programs of the OEM
- Commodity  
The commodity of the programs of the OEM
- Request IDs  
Request IDs of the OEM

**View control file**

From the result list, a control file view can be created. Please refer to chapter 5.3.3.6.2 “Control File Overview”.

**Export Control file**

From the result list, directly a control file can be created. Please refer to chapter 5.3.3.6.2 “Control File Overview”.

### 5.3.3.6.2 Control File Overview

The control file contains a complete overview for the selected OEM.

The control file has a hierarchical structure:

- OEM
  - Program
    - Plant
      - Customer

The screenshot shows the 'Control file' interface. At the top, there are two buttons: 'Show IMDS Submission Due Date state' and 'Export Control file'. Below these is a table with columns: 'VEHICLE / PROGRAM / PLANT', 'CUSTOMER', 'PROGRAM MANAGER', 'PRODUCT ENGINEER', 'REQUESTOR', 'BOM RESPONSIBLE', and 'PURCHASING RESPONSIBL'. The table contains several rows of data, with some rows expanded to show a hierarchical structure. The data in the table is as follows:

VEHICLE / PROGRAM / PLANT	CUSTOMER	PROGRAM MANAGER	PRODUCT ENGINEER	REQUESTOR	BOM RESPONSIBLE	PURCHASING RESPONSIBL
▼ Vehicle						
▼ Program						
▼ Plant						
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA
	AB-Hochschule	NA	NA	NA-1100	NA	NA

Figure 43: Control file

Below these hierarchical OEM view, following areas are available:

- List of assemblies for an OEM

CUSTOMER PART NUMBER	PART NUMBER	CUSTOMER PART NAME	REPRESENTED PART NUMBERS	ASSEMBLY SUBMITTED	DATE SUBMITTED

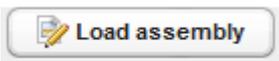
Figure 44: Assembly list for an OEM

- List of components for this plant

PART NUMBER	SUPPLIER PART NUMBER	PART NAME	SUPPLIER	SUPPLIER ID	SUPPLIER/CUSTOMER CODE	IMDS ID

Figure 45: Component list for an OEM

In all lists, an entry can be selected to view the details:



View the details of a selected assembly.  
See chapter 5.3.3.2.2 “Assembly Details” **for further details.**

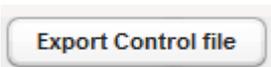


View the details of a selected component.  
See chapter 5.3.3.3.2 “Component Details” **for further details.**

Additionally following actions are available:



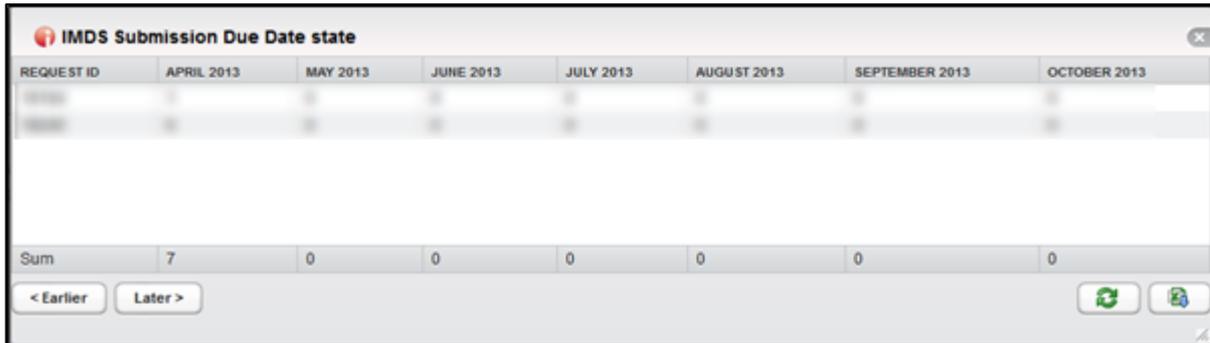
Show the submission date for all assemblies  
See chapter 5.3.3.6.3 “IMDS Submission Due Date States” **for further details.**



Export the selected control file.  
See chapter 5.3.3.6.4 “Control File Export” **for further details.**

### 5.3.3.6.3 IMDS Submission Due Date States

This screen is to provide an overview of all assembly submissions.



REQUEST ID	APRIL 2013	MAY 2013	JUNE 2013	JULY 2013	AUGUST 2013	SEPTEMBER 2013	OCTOBER 2013
...	...	...	...	...	...	...	...
Sum	7	0	0	0	0	0	0

Figure 46: IMDS Submission Due Date State

This screen shows for 7 months starting with the current month the IMDS submissions per request.

Following functions are available:

<input type="button" value=" &lt; Earlier"/>	show seven months statistics with starting one month earlier
<input type="button" value=" Later &gt;"/>	show seven months statistics with starting one month later

### 5.3.3.6.4 Control File Export

**This function creates an Excel file called “Control File” which has three major areas (tabs):**

- Compliance Summary  
An overview of all requests including statistical information
- Assembly list  
The related assembly list for this OEM including statistical information
- Component list  
The related component list for this OEM including statistical information

The Excel file can be stored once it is created.

### 5.3.3.7 Request

#### 5.3.3.7.1 Request Search

This area is to find requests.

A detailed description of the available search criteria can be found in chapter 5.3.2.1 “All Requests”.

From the result list, a request can be opened to see all details. Please refer to chapter 5.3.3.7.2 “Request Details” **for further details**.

#### 5.3.3.7.2 Request Details

This screen is to show all details of a request.

The screen is divided into several areas:

- Basic:  
Common information about the request

▼Basic			
Program	My Test Program	Model year	2014
Manufacturing Plant	Test Plant	PPAP Due Date	202412
Customer	Auto Business Ltd Manufacturing	IMDS Due Date	202412
Supplier code	123456		

Figure 47: Request Details “Basic”

This area shows all common information about the request.

- Team:  
All information about team members

▼Team			
Program manager	John D.	IMDS coordinator	Schwarz
Purchasing responsible	John	Product engineer	John
Quality responsible	John	BOM responsible	John

Figure 48: Request Details “Team”

This area shows all information about the team members for this request

- BOM Files

▼BOM files				
Imported BOM files			Original BOM files	
JOB-ID	FILE NAME	STATE	FILE NAME	BOM COMMENT
10001	Sample BOM 1 (Imported)	OK	Sample BOM 1 (Original)	
10002	Sample BOM 2 (Imported)	OK		
10003	Sample BOM 3 (Imported)	OK		

Figure 49: Request Details “BOM Files”

This area shows all details about the BOM files for this request:

- Left area:  
BoM files which were imported into the application. Use to see the protocol of the import.
- Right area:  
Files which were provided by business (typically the requestor). Use to open the file.

- Assemblies

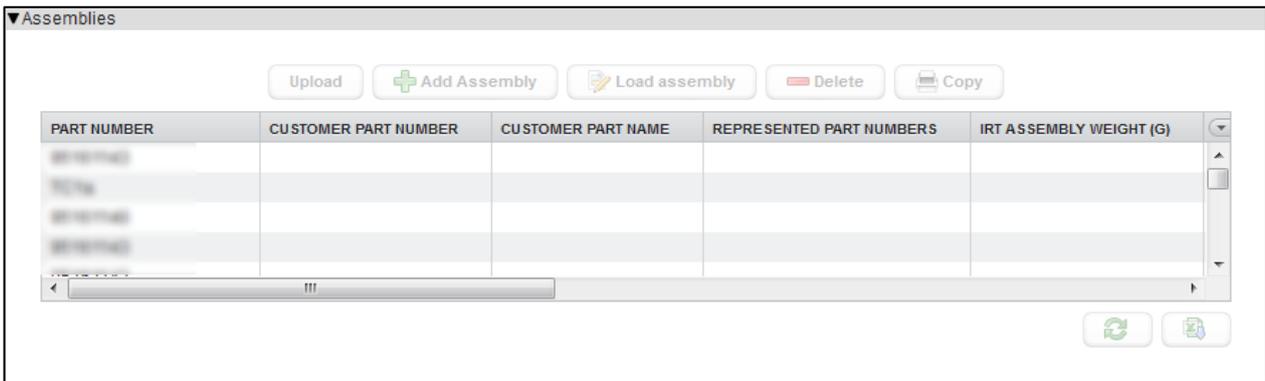


Figure 50: Request Details “Assemblies”

This area shows a list of all assemblies for this request.

- History



Figure 51: Request Details “History”

This area shows a list of major events for this request.

### 5.3.4 Reports

#### 5.3.4.1 DC Report

The DC report (Data Collector) shows all assigned components for a DC grouped by supplier including a status overview

Data collector report		Champions report
DATA COLLECTOR / SUPPLIER / COMMODITY	TOTAL COMPONENTS	OPEN COMPONENTS
▶ Vendor Materials	0	0
▶ Vendor Materials (iPoint)	0	0
▶ TOL PLAST S.A.	0	0
▶ CHANGHUANG SHANGHAI HONGKONG TRADING CO., LTD.	0	0
▶ ABC Laser Systems	0	0
▶ Andrius Adamkus (iPoint)	0	0
▶ Andrius Adamkus (iPoint)	1	1

Figure 52: Data Collector (DC) report

This report shows per DC a list of related supplier including the amount of total components and open components.

Use the standard functions to fold/unfold as required.

### 5.3.4.2 Champions Report

The Champions Report provides an overview about assigned assemblies per Champion.

Data collector report		Champions report	
CHAMPION / REGION / CUSTOMER	OPEN ASSEMBLIES	TOTAL ASSEMBLIES	
▶ Open Assemblies (Low System / Dead System)	0	0	
▶ Not Standing	0	0	
▼ Open Assemblies (Front Standing)	107	107	
▼ North America	0	0	
▼ South America	0	0	
▼ Europe	107	107	
US - Midwest	26	26	
US - South	181	181	
▶ Open Assemblies (Low System / Dead System)	0	0	

Figure 53: Champions report

The report shows hierarchical per

- Champion
  - Region
    - Customer

The total amount of assigned assemblies as well as open amount of assemblies.

## 6 File Formats

### 6.1 Assembly list

To import an assembly list, an Excel file with following format must be used:

C	D	E	F	G	H	I	J	K
Customer part name	Represented part numbers	Plant Part Weight (g)	Drawing number	Drawing change level	Drawing date	Renault Part Index	Email of designer	MACSI Datasheet Number

Figure 54: File format for assembly import

The first line of the file is a header line and will not be processed.

The next lines are read as one assembly per line.

### 6.2 BoM Import Format

The following list documents the file format for BoM imports.

Column	Content	Reference	Format	Remark
1.	Part number	Head	50(alpha)	Part number of the component
2.	Name, Description	Head	255(alpha)	Name of the component
3.	Plant	head	4(alpha)	Number of the plant (must be unique for complete BoM)
4.	Base quantity	Position	17(num)	Quantity, to which the amount is given (must be 1 currently)
5.	Position-No.	Position	4(num)	Position-No. of the child (e. g. 10, 990)
6.	Child part number	Position	50(alpha)	Part number of the used assembly/material
7.	Name, Description	Position	255(alpha)	Name of the sub-component
8.	Component weight/amount	Position	17(num)	Amount or weight of the sub-component. This field contains 3 decimal places (must be given including the decimal separator, e.g. 1.010).

Column	Content	Reference	Format	Remark
9.	Unit of Measure (UoM)	Position	4(alpha)	The Unit of measure regarding column 8. Value list: ST: (piece) EA: (piece) KG: kilogram G: Gram M: M M2: M2 M3: M3
10.	Flag: assembly	Position	1(alpha)	If the child is an assembly and specified further it must <b>be set to "X", otherwise: empty</b>
11.	Flag: saleable product	Root	1(alpha)	If the root is a saleable product, it must be set to <b>"X", otherwise: empty (When "X" is given, a MDS will be created, otherwise a module will be created)</b> It must be set for all lines where the root is the head item to ensure it is processed properly.
12.	Flag: Purchase position	Position	1(alpha)	If the child is a purchase part or material, it must be <b>set to "X", otherwise: empty</b>
13.	Supplier number of the sub-component	Position	18(alpha)	The PDM-supplier number of the child (if purchase part) This entry is optional
14.	Head weight	Head	17(num)	Amount or weight of the head node. This field contains 3 decimal places (must be given including the decimal separator, e.g. 1.010). This entry is optional
15.	Head Unit of Measure (UoM)	Head	2(alpha)	The Unit of measure regarding column 14. Value list: KG, G, MG This entry is optional
Start of LEAR specific extension				

Column	Content	Reference	Format	Remark
16.	Supplier Name	Position	255(alpha)	Used to identify supplier: Find assigned supplier name in master data. Compared by using uppercase! If empty, no supply MDS will be searched at all.
17.	<i>Supplier part number</i>	Position	255(alpha)	Alternative part number for supply parts If available, use also for matching. For missing positions, put this number into the IHS number
18.	<i>IMDS Module ID</i>	Position	18(num)	If provided, use this for matching instead of part numbers! If provided with version (in column 19), use only exactly that version if available If provided without version (in column 19), use latest available version
19.	<i>IMDS Version</i>	Position	3(num)	<i>IMDS Version regarding IMDS Module ID in column 18.</i> The version must be provided as a full number without decimal places only. Otherwise it will be ignored
20.	<i>Polymeric Mark</i>	Head	2(alpha)	Only used for assemblies when the next level are plastic- materials. In this case the polymeric mark question will be set as provided. If not provided, the question will not be answered by import job  Value for polymeric mark Y= yes N=No NA = not applicable

Column	Content	Reference	Format	Remark
21.	<i>BoM Received date</i>	Head	10(alpha)	Not processed further for import The date must be provided in the format DD.MM.YYYY Where DD is day, MM is month and YYYY is year.

Figure 55: Table describing the BoM import format

Following rules for the matching process will apply:

- For each assembly on level 1 a MDS (assembly) is created
- For each lowest level entry the BoM the system must check available IMDS data based on
  - o Part number
  - o Supplier name/code as provided in iPoint company **master data “supplier code”**
- If no supplier name/code is given in BoM, always create a missing position.
- If the supplier name/code cannot be translated by the system, a missing position is created
- It will then be checked whether there is an accepted MDS from this IMDS Company (identified by given supplier name/code).
  - o If found, this is used.
  - o If multiple found, the latest accepted will be used.
  - o If nothing found, own MDS will be searched (independent from current status) using the part number and supplier name/code.
  - o If found, it will be used.
  - o If multiple found, the one with the highest internal ID will be used (latest created).
  - o If nothing found, a **“missing position” is created.**

## 7 Glossary

Term	Explanation
Assembly	An assembly is an item which is created within a project end delivered to a customer
Component	A component is something which is bought from a supplier and used to create an assembly
IMDS Champion	A person responsible to create MDS for assemblies
IMDS Collector	A person responsible to request data from supplier
IMDS Coordinator	A person which is responsible in programs for PPAPs and requesting MDS for these.
IMDS Validator	A person which is checking and accepting/rejecting supplier MDS
PPAP	Production Part Approval Process <b>The official process to get the “go” to produce and deliver an assembly</b>

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## 9 Change History

Version	Date	Description
9.02	14.05.2012	First release
9.02	02.08.2013	Minor adjustments
10.18	31.03.2015	<ul style="list-style-type: none"><li>• Improved search criterion for internal customers</li><li>• <b>New search criterion “request IDs” for OEM search</b></li><li>• New comment field on component level</li></ul>
10.19	23.07.2015	Added new function for direct creation of CF, chapter 5.3.3.6.1