

SAM-M User Manual

R13

iPCA Substance and Material Manager (SAM-M) User Manual

iPoint-systems gmbh

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Imprint

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1 Introduction

1.1 General

This document describes the functionality of the iPCA module (iPoint Compliance Agent).

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

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

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

The iPCA Substance and Material Manager (SAM-M) is a software product that enables the user to define the compliance status of the company's products within just a few seconds. The iPCA SAM-M gathers all information available, whether from other in house solutions (IHS), or directly from the suppliers if there is no information available yet. iPCA help files are available for basic concepts and terms, which explain the basic procedures and ideas/models.

The application is implemented as a Java application and has to be installed locally on the client machine. The installation is deployed using Java Web Start which runs an update test automatically when starting the application. Therefore an update of the installation is controlled through the server.

This handbook gives an insight into the capabilities of this software solution, as well as guidance to configure the tool according to the needs of each user. This user manual refers to the iPoint-In-house-System SAM-M and explains the add-ons. More useful information about "How to work with iPCA" can also be found in the iPCA/IHS user manual. Sections of this document describe optional functions. These optional functions are clearly marked as "optional" throughout the document. Some functions are only available with specific rights assigned to the logged-in user. If a required functionality is not available for you, please contact your internal administrator.

The handbook is divided in four principal parts corresponding to:

- Getting started (chapter 2)
- Functionalities available in the main menu (chapter 3)
- Functionalities available in the toolbar (Chapter 4)
- Detailed view of the search window (Chapter 5)

1.2 Support

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

The administrator will check and answer your enquiry.

If your administrator cannot resolve the issue, he or she should contact iPoint-systems gmbh to get a proper solution.

It is important that only the administrator contacts iPoint-systems gmbh as this will result in the fastest solution possible.



1.3 New functions

| Version | Description |
|----------|---|
| 8.05.005 | Completed new design |
| 8.08.001 | Revising all screenshots and adding new functions |
| 8.09.001 | Re-design and actualization of the whole document |
| 13.00 | Revising all screenshots and adding new functions |
| | |
| | |



2 Getting started

To start the iPCA application, please use the link that has been provided during the system-handover or write an email to the iPoint support: icsc@ipoint-systems.de. A webpage, similar to the one displayed below should load.

| iPoint | Compliance Agent | | iPoint Compliance Agent |
|--------|---------------------|--|---------------------------|
| | | Installation | Compliance Agent starten |
| | | Diese Installation verwendet die Java Web Start Technologie. Weitere Informationen zu Java Web Start findet sich unter | Java Web Start |
| _ | | Zur Verwaltung von Java Web Start Anwendungen (Einstellung des Proxyservers, Löschen der Cache Dateien, usw.) benutzen Sie bitte die Java Web Start Konsole | Web Start Konsole starten |

Figure 1: Getting started - iPCA via web Browser

Click on "Start Compliance Agent" to start the application (If this is the first time you're launching iPCA or if there is a major update; a download will be required). Depending on the security settings, it might be necessary to allow unrestricted access for the application to run.

A new window will open where it is required to fill in (See Figure 2): Username (1) and Password (2); the language can be chosen (3). The amount of languages available is configurable. If you would like to have more languages available, please contact iPoints support team under icsc@ipoint-systems.de.

The system administrator receives login data upon handover of the system and can create new users.

Click on Login (4) to enter the application.

| Login for il | PCA/IHS |
|---------------|----------------------|
| Please fill i | n your userdata: |
| Username: | |
| Password: | 2 |
| Language: | 3 English 🗸 |
| 4 | |
| | |
| Login | Cancel Request login |

Figure 2: Getting started - Login window of iPCA



When iPCA opens and you can find your personal login data at the bottom of the page (See Figure 3): the name of the logged user is displayed on the left side (1), the Organization Unit Identifier (Org.-Unit-Id) (2) and the iPCA Version number (3).

| O iPoint Compliance Agent | |
|---|--|
| File Edit Data Options Extras Window Help | |
| 86 D 🔲 🔑 🖉 🚸 | |
| User: | (Version OK4V - © 2003-2015, iPoint-systems gmb) |

Figure 3: Getting started - iPCA Start page



3 Components of the menu bar

After starting the application, the key functions are available in the main menu or shown as icons. This manual describes in the first chapters (2 to 8), the available functions in the main menu.



Figure 4: Getting started - SAM-M Configuration: main available menu tabs and icons

3.1 File

The File tab allows to have access to file functions shown in the Figure 5.



Figure 5: File - Overview

- New
 - Allows to open/ create a new MDS/module. It can be an Article, Mixture or Substance. The process will be explained in the chapter 4, compliance information.
 - Create a SEP Request: Allows the user to create a Supplier Entry Portal Request These are done for campaigns to collect material compliance information from suppliers
- **Recently Opened:** This utility display the list of all recently opened files by the user
- **Screenshot:** Allows to "save" or "print" a screenshot of iPCA as it currently viewed.
- **Change application language:** This will allow the user to change the language that is currently beingn displayed in iPCA
- Logout/Change User: Allows to change the User or language. All unsaved data will be lost.
- **Exit:** Allows the user to disconnect from the system. All unsaved data will be lost.



3.2 Edit

This feature within software allows the modification of files. First the file must be searched using specific criteria. After the selection, the file can be created, modified, copy or deleted. This function will be explained in detail in the chapter 4 per function: Parts Inventory (PI), Product (VP), Article, Mixture, Article/Mixture, Basic substances, SEP (See Figure 6)

| iPoint Compliance Agent X File Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Edit Data Options Extras Window Help iBe Emerson Part No (IPN): Part Name: Supplier DUNS: Last Change: IBe Edit Data Options Extras Supplier Code/Number: Qualification Status: Commodity: iBe Supplier OrgUnit-ID: image: Creator: | | | | | | | | |
|---|-------------------------------|-----------------------|------------------------------|-----------|-----------------------|---|-----|-----|
| Eile Edit Data Options Extras Window Help | O iPoint Compliance Agent | | | | | - | - 🗆 | × |
| | File Edit Data Options Extras | Window Help | | | | | | |
| Search Image: Creation Date: | 🗶 🏍 Search MDS/module 🕯 | Ctrl+F | | | | | | |
| Parts Inventory Product Article Mixture Article / Mixture Basic substances SEP Emerson Part No (IPN): Part Name: Supplier DUNS: Last Change: Qualification Status: Supplier Code/Number: Qualification Update: Supplier OrgUnit-ID: Creator: | 🕷 Search | | | | | | | P 🗙 |
| Emerson Part No (IPN): Mfg. Part No. (MPN): Creation Date: Image: Creation Date: <td>Parts Inventory Product</td> <td>Article Mixture Artic</td> <td>:le / Mixture Basic substa</td> <td>inces SEP</td> <td></td> <td></td> <td></td> <td></td> | Parts Inventory Product | Article Mixture Artic | :le / Mixture Basic substa | inces SEP | | | | |
| Emerson Part No (IPN): Mfg. Part No. (MPN): Creation Date: Image: Creation Date: Part Name: Supplier DUNS: Last Change: Image: Creation Update: Qualification Status: Supplier Code/Number: Qualification Update: Image: Creator: Commodity: Supplier OrgUnit-ID: Creator: Image: Creator: | | | _ | | | | | |
| Part Name: Supplier DUNS: Last Change: Image: Change: Image: Change: Change: Image: Change: | Emerson Part No (IPN): | | Mfg. Part No. (MPN): | | Creation Date: | - | | |
| Qualification Status: Supplier Code/Number: Qualification Update: Image: Commodity: Commodity: Supplier OrgUnit-ID: Creator: Image: Creator: | Part Name: | | Supplier DUNS: | | Last Change: | | | |
| Commodity: Supplier OrgUnit-ID: Creator: | Qualification Status : | ~ | Supplier Code/Number: | | Qualification Update: | | | |
| | Commodity: | 86 | Supplier OrgUnit-ID: | | Creator: | | | |
| Status: Active V Supplier Name: Last Editor: | Status: | Active \checkmark | Supplier Name: | | Last Editor: | | | |
| Region: 🗸 | | | Region: | ~ | | | | |
| * Reporting & Compliance Status | + Reporting & Compliance Sta | tus | | | | | | |
| + Organization Structure | + Organization Structure | | | | | | | |

Figure 6: Edit – Search MDS/module

3.3 Data

The Data tab allows to have access to functions shown in the Figure 7 explained in detail in the following subsections.

O iPoint Compliance Agent

| <u>F</u> ile | Edit | Data | Options Extras Window Help | |
|--------------|----------|------------|--|---|
| 8 | 6 🗅 | • | Import/Export overview | |
| 86 S | Search | • | Deactivate MDS, companies or org-units | |
| | Parte lu | | Analysis | Article / Mixture Basic substa |
| | | ×, | PDM BoM import (SAM-M) | |
| - | Em | ×, | PDM BoM import (VP) | Mfg. Part No. (MPN): |
| | Par | a) | Substance import | Supplier DUNS: |
| | Qui | | Documents | Supplier Code/Number: |
| | Cor | | EDAS XML import | & Supplier OrgUnit-ID: |
| | Stat | | IPC1752 Import | Supplier Name: |
| | | ۳.) | Supplier Data Import (SAM-M) | Pagion |
| | | ×. | Supplier Contact Data Import | Region: |
| + | Repo | | Commodity Import | |
| + | Orga | | Organization Structure Import | |
| - | Æ | ×. | Part Data Import | Reset |

Figure 7: Data – Overview



3.3.1 Data - Import/Export overview

The window tabs (overview and MDS/Module details) allow the user to search for all imported/exported information, as well as the process state (successful, unsuccessful, in progress, etc.) and the file type (PCC, PDM, Excel, etc.) as shown in the Figure 8 and Figure 9.

| Na | me: | | | | State: | | All | | | |
|-----------|---------------------|--------------|--------------|--------------------|-----------|-------------|------------------------------|-----------------------------|--------|---|
| M | ode: | All | | ~ | Туре: | | All | | | |
| DB | -Job ID: | | | | | | All | | | |
| É) ata | | Search | | Reset | | Info: 3 | Emerson Par Virtual Produ | rt Import uct (Custom) | м | |
| | Name | | State | Date | User | | Product Line | a import salvi- e import | NI . | |
| 1 | Parts_Test_Data_CA- | 10859.xlsx | Successful | 2018/04/16 05:13:3 | 9 AM imds | id, imdsad | VP Organisa | tion Structure I | mport | |
| 2 | C:\Users\mmedalla\ | Desktop\Clie | Successful | 2018/04/09 09:47:4 | 6 PM Meda | lla, Marcos | Supplier Cor | ntact Data Impo | ort | |
| 3 | FAIR_IPC_1752_FDM | A291P.xml | Unsuccessful | 2018/04/09 06:06:4 | 5 PM Meda | lla, Marcos | IPC1752 | XML | Import | |
| 4 | FAIR_IPC_1752_MME | T2222AT.xml | Successful | 2018/04/09 05:59:3 | 1 PM Meda | lla, Marcos | IPC1752 | XML | Import | |
| 5 | VISH_IPC_1752_CRC | W040247R0J | Unsuccessful | 2018/04/09 03:35:1 | 4 PM Meda | lla, Marcos | IPC1752 | XML | Import | |
| 6 | VISH_IPC_1752_CRC | W06031K00J | Unsuccessful | 2018/04/09 03:10:1 | 4 PM Meda | lla, Marcos | IPC1752 | XML | Import | |
| | | | | | | | | | |) |

Figure 8: Data – Import/Export overview

| - | r 🗊 😑 🦉 | ۲ | | | | | | | | | |
|------|---------------------|--------------|--------------|----------------|----------|-------------------|-----------------|----------|--------|--------|---|
| mpor | t/Export overview | | | | | | | | | - | |
| verv | iew MDS/Module | details | | | | | | | | | |
| Na | ime: | | | | Sta | ite: | All | | | | |
| M | ode: | All | | | ~ Тур | pe: | All | | | | |
| DB | -Job ID: | | | | | | Open | | | | |
| | | | | | | | Successful | | | | |
| (B | | Search | | Reset | | Info: 3 | Successful with | error(s) | | | |
| ata | | | | | | | In process | ciror(s) | | | |
| | Name | | State | Date | | User | Туре | Format | Mode | Job-ID | |
| 1 | Parts_Test_Data_CA- | 10859.xlsx | Successful | 2018/04/16 05: | 13:39 AN | 4 imdsad, imdsad | Emerson Part I | BIN | Import | 19044 | |
| 2 | C:\Users\mmedalla\ | Desktop\Clie | Successful | 2018/04/09 09: | 47:46 PN | A Medalla, Marcos | IPC1752 | XML | Export | | |
| 3 | FAIR_IPC_1752_FDM | A291P.xml | Unsuccessful | 2018/04/09 06: | 06:45 PN | Medalla, Marcos | IPC1752 | XML | Import | | |
| 4 | FAIR_IPC_1752_MMB | 8T2222AT.xml | Successful | 2018/04/09 05: | 59:31 PN | A Medalla, Marcos | IPC1752 | XML | Import | | |
| 5 | VISH_IPC_1752_CRCV | W040247R0J | Unsuccessful | 2018/04/09 03: | 35:14 PN | Medalla, Marcos | IPC1752 | XML | Import | | |
| 6 | VISH_IPC_1752_CRCV | W06031K00J | Unsuccessful | 2018/04/09 03: | 10:14 PN | A Medalla, Marcos | IPC1752 | XML | Import | | |
| | | | | | | | | | | | 2 |

Figure 9: Data – Import/Export overview – MDS/Module details

3.3.2 Deactivate MDS, companies or org-units

The window tabs (Companies, Organization-Units, Articles/Mixutes) allows the user to search for and deactivate selected entries. See example as shown in Figure 10

| omp | anies Organis | ation-Units | Articles / Mix | tures | | | | | | | |
|----------------------------|---|--|--|---|--|--------------------------------|--|---------|---|--------------------------------------|---|
| Na | ame/Synonyms: | | | | IHS no.: | | | | | | |
| Ar | ticle/Mixture no.: | | | | Standard Article | e/Mixture no.: | | | | | |
| Tra | ade name: | | | | IHS Release stat | tus: | | | | | ` |
| Ar | ticle/Mixture ID | | | | Valid to: | | | - 11 | | | Ĩ |
| | | Current Ve | rsion | | Status: | A | lctive | V Type: | | | ~ |
| Exte | ended | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | - |
| ₩∎ | | Sea | rch | Reset | | Info: 410 rd | ows found! | | | E | 1 |
| Ma Data | 1 | Sea | rch | Reset |] | Info: 410 rd | ows found! | 1 | | [| 1 |
| ₩ <u>∎</u>)ata | Name | Sea | rch | Reset IHS Rel. | Release Date | Info: 410 ro Release commer | ows found! nt Mixture no. | IHS no. | REACH relevance | e REA | |
| Me Data | Name Name of part IP- | Sea | -ST-03-IP-MPN- | Reset IHS Rel. 1 3 | Release Date | Info: 410 ro Release commer | ows found! nt Mixture no. | IHS no. | REACH relevand | ce REA | |
| Mata | Name Name of part IP- Name of part IP- | Sea IPN-100200-IP IPN-100300-IP | -ST-03-IP-MPN- -ST-04-IP-MPN- | Reset IHS Rel. 1 3 1 0 | Release Date | Info: 410 ro | Mixture no. IP-MPN-100200 IP-MPN-100300 | IHS no. | REACH relevand 3 3 | ce REA | |
| Ma Data 1 2 3 | Name Name of part IP- Name of part IP- Name of part IP- | Sea IPN-100200-IP IPN-100300-IP IPN-100400-IP | -ST-03-IP-MPN- -ST-04-IP-MPN- -ST-05-IP-MPN- | Reset IHS Rel. 1 3 1 0 1 0 | Release Date 2018/04/06 2018/04/06 | Info: 410 ro | nt Mixture no. IP-MPN-100200 IP-MPN-100300 IP-MPN-100400 | IHS no. | REACH relevand 3 3 3 3 | e REA 0 0 0 | |
| 1 2 3 4 | Name Name of part IP- Name of part IP- Name of part IP-I EMR BOM 1 | Sea IPN-100200-IP IPN-100300-IP IPN-100400-IP | -ST-03-IP-MPN- -ST-04-IP-MPN- -ST-05-IP-MPN- | Reset IHS Rel. 1 3 1 0 1 0 0 | Release Date 2018/04/06 2018/04/06 | Info: 410 ro | ows found! nt Mixture no. IP-MPN-100200 IP-MPN-100300 IP-MPN-100400 EMRBOM1 | IHS no. | REACH relevand 3 3 3 3 3 | Ee REA 0 0 0 0 | |
| 1 2 3 4 5 | Name Name of part IP- Name of part IP- Name of part IP- EMR BOM 1 0100004047 | Sea IPN-100200-IP IPN-100300-IP IPN-100400-IP | -ST-03-IP-MPN- -ST-04-IP-MPN- -ST-05-IP-MPN- | Reset IHS Rel. 1 3 1 0 0 0 | Release Date 2018/04/06 2018/04/06 | Info: 410 re | nt Mixture no. IP-MPN-100200 IP-MPN-100300 IP-MPN-100400 EMRBOM1 293D106X9010A | IHS no. | REACH relevand 3 3 3 3 3 3 3 | ce REA 0 0 0 0 0 0 | |
| 1 2 3 4 5 6 | Name Name of part IP- Name of part IP- Name of part IP- EMR BOM 1 0100004047 0100004065 | Sea IPN-100200-IP IPN-100300-IP IPN-100400-IP | -ST-03-IP-MPN- -ST-04-IP-MPN- -ST-05-IP-MPN- | Reset IHS Rel. 1 0 1 0 0 0 0 0 | Release Date 2018/04/06 2018/04/06 | Info: 410 ro | nt Mixture no. IP-MPN-100200 IP-MPN-100300 IP-MPN-100400 EMRBOM1 293D106X9010A 293D106X9016A | IHS no. | REACH relevand 3 3 3 3 3 3 3 3 3 3 3 | e REA 0 0 0 0 0 0 | |

Figure 10: Data – Deactivate MDS, Companies or Org-units



3.3.3 Data – Analysis (CSI wizard)

It is possible to define cyclic testing procedures which will start automatically depending on set parameters. The user will be informed automatically about the results of the cyclic CSI checks by e-mail. To start the parameter definition, please click the "analysis" icon in the red box (See Figure 11). Then a new dialog window opens (wizard). In the register tab the needed checking parameter can be defined.

| O iPoint | Compliance Agent |
|-------------|---------------------------------|
| File Edit | Data Options Extras Window Help |
| 86 🗋 | 🕎 🖉 🧶 |

Figure 11: Analysis – CSI wizard - Cyclic Checking Procedures

The wizard provides you through the configuration of the checking predefinition – by entering your needed parameters and clicking on the "next" icon (See Figure 12).

| Analysis | 1 | |
|---|---------------------------------------|-------------------|
| tep 1: Please select action: | | |
| Check (start a new check of data); | Options: | |
| ○ Article | Job name: | |
| OMUG | Email notification after job has been | n finished. |
| O Mixture | Attach analysis log to email. | |
| | Start date and time: | 12:00 AM ≑ |
| | Cyclical | |
| | Interval: | (at least 3 days) |
| | Monitoring: | |
| O View results (inspect results o | of previously started checks): | |
| All (Article/Mixture) | | |
| Article | | |
| O Mixture | | |
| | | |

Figure 12: Analysis - CSI - Wizard

3.3.3.1 Analysis - Reports

The existing reports can be searched by name and/or state (active or inactive). The report type can be also selected from the "Report type" (Own contacts, Cycle time of SEP requests, Overruled compliance report, REACH substance report, etc.) as shown in the Figure 13.

| Analy: | sis | | | | | | | , o 🗙 |
|-------------|-----------|-----------|------------|------------|---------|------------------|----------------|--------|
| CSI wi | zard Repo | rts Usage | | | | | | |
| Report | type: | Own Co | ontacts | | \sim | | | |
| - Las | stname: | | | Firstname: | | | State | ~ |
| Øł⊒ Data | | Search | Res | et | Info: | 2 rows found! | | |
| | Lastname | Firstname | Department | Phone No. | Fax No. | Email | | State |
| 1 | LASTNAME | FIRSTNAME | | | | supplier.default | t@emerson.com | active |
| 2 | Medalla | Marcos | | | | marcos.medalla | a@ipointinc.co | active |

Figure 13: Analysis – Reports



3.3.3.2 Usage Analysis

The usage analysis allows the analysis of Article/Mixture. In addition to the check rules, the user can define their own lists of substances for further checks. If the role of the user has the permission REACH_ANALYSE, an additional tab "Usage" is added to the analysis. By clicking the "Analysis" icon, the dialog box "Index" opens. And can be switched to the "usage" tab.

The following types of usage analyses are available (See Figure 14):

- Substance: Analyse articles and mixtures for the use of selected substances
- Not pre-registered substances: Analyse articles and mixtures for the use of pre-registered substances/not pre-registered substances

| Analysis | | | - • X |
|--------------------------|-------------|--------|--------------|
| CSI wizard Reports | Usage | | |
| Step 1: Please select an | alysis type | | |
| O Substance | | | |
| O Not pre-registered su | ubstances | | |
| | | | |
| . D | | M. I. | |
| < Bac | ĸ | Next > | |

Figure 14: Analysis - Usage

3.3.3.3 Analysis - Usage types

The "Substance" section of the Analysis Wizard allows you to analyse articles and mixtures for the use of certain substances or substance groups. Three analysis wizard steps ask the user for the (See Figure):

- Type of analysis (red box)
- Material data sheet selection (to define the searched articles/mixtures). Substances that are to be searched, and analysed for the articles and mixtures (blue box)



| idea | SAM M Llcor Manual |
|------|---------------------|
| IPCA | SAM-M – USEI Mahuai |

| N: | me/Sunonum: | | | | | GADSI categori | ec: r | equires declaratio | a. | | ○ No | | and |
|------|-----------------------------|-------------|--------------|---------------|------|------------------|-----------------|--------------------|----------|----------|-----------|---------|----------|
| 0 | IS No : 7759 | | | | | GADSE categori | cs. 11 | forbidden: | | O Ver | | N.A. | unu |
| | | | | | | REACH SVILC. | | a forbidden. | | Turn | | () N.A. | |
| EU | -index: | | | | | REACH-SVHC: | | v.A. | ~ | Type: | | | |
| EI | necs No.: | | | | | Substance grou | p types: | | ~ | Substand | e groups: | | |
| _ | | Status: | Active | | ~ | REACH relevan | ce: | | ~ | REACH s | tate: | | |
| Add | litional search parameters | | | | | | | | | | | | |
| ₩a | | Search | F | Reset | | | Info: 17 rows | found! | | | | | |
| Data | | | | | | | | | | | | | |
| X | Name | CAS No. | EU-Index | Einecs/Elincs | Syn | ionym 1 | Synonym 2 | Synonym 3 | GADSL / | SVHC | Туре | REACH | relevanc |
| 1 | Potassium-bromate | 7758-01-2 | 035-003-00-6 | 231-829-8 | pot | assium bromate | | | | | IHS | | - 5 |
| 2 | Potassium-bromide | 7758-02-3 | | 231-830-3 | | | | | | | | | 5 |
| 3 | lodic acid (HIO3), potassiu | 7758-05-6 | | 231-831-9 | Pot | assium iodate | | | | | | | 5 |
| 4 | Dipotassium-hydrogenort. | 7758-11-4 | - | 231-834-5 | Pot | assium phosph | Dipotassium | Phosphoric ac | | | | | 5 |
| 5 | Disodium dihydrogenpyro | 7758-16-9 | | 231-835-0 | Sod | ium pyrophosp | Sodium dipho. | Disodium Dih | | | IHS | | 5 |
| 6 | Calcium dihydrogenphos. | . 7758-23-8 | | 231-837-1 | Calo | cium phosphat | Calcium bis(d | . Primary calciu | | | IHS | | 5 |
| 7 | N-(isoxazol-5-yl)sulphanil. | 7758-79-4 | | 231-839-2 | | | | | | | IHS | | 5 |
| 8 | Tricalcium bis(orthophosp | 7758-87-4 | | 231-840-8 | | | | | | | | | 5 |
| 9 | cerium trifluoride | 7758-88-5 | | 231-841-3 | | | | | | | IHS | | 5 |
| 10 | Iron-dichloride | 7758-94-3 | | 231-843-4 | | | | | | | | | 5 |
| 11 | Lead chloride | 7758-95-4 | | 231-845-5 | Lea | d chloride (PbC | Lead dichloride | | DP | | IHS | | 5 |
| 12 | Lead chloride | 7758-95-4 | | | | | | | | | IHS | | 5 |
| 13 | Lead chromate | 7758-97-6 | 082-004-00-2 | 231-846-0 | Plur | mbous Chromate | Chrome yellow | Chromium6 c | DP / SVH | С | IHS | | 5 |
| 14 | Lead chromate | 7758-97-6 | 082-004-00-2 | 231-846-0 | Plur | mbous Chromate | Chrome yellow | Chromium6 c | / SVH0 | 2 | IHS | | 5 |
| 15 | Sulfuric acid copper(2+) s. | . 7758-99-8 | | 616-477-9 | Cop | oper sulfate pen | | | | | IHS | | |

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Figure 15: Analysis - Usage Types

The final step displays the analysed result. This includes the substances found, as well as their position within the analysed article or mixture. From here it is possible to jump directly to the position of the substance within the analysed article or mixture.

| Analysis | | | | | | | | | | | |
|----------------|---------|-----------------|-------------------|---------------------|---------|-----------|------------------|------------------|---------------------------|------------|-------------------------|
| SI wizard | Re | ports L | Isage | | | | | | | | |
| ep 3: Please c | hoose a | rticles/mixture | es to search in (| (Substance usage): | | | | | | | |
| Name | e/Svn | onyms: | | | IHS r | no : | | | | | |
| | | | | | | | | | | | |
| Artici | ie/Mi | cture no.: | | | Stan | dard Arti | cie/Mixture no.: | | | | |
| Trade | e nam | ie: | | | Max | . limit: | | | | | |
| | | | Current | Version | Valie | t to: | | | | - [| |
| | | | Current | Version | Valic | 1 10. | | | | | |
| | | | | | Statu | JS: | | Active | Type: | | |
| Extend | hol | | | | | | | | | | |
| Exterio | leu | | | | | | | | | | |
| | | | Se | earch Reset | J | | Info | : 593 rows found | 1! | | |
| Data | | | | | | | | 0.2.5 | (CT) | | |
| Тур | be | Name | | Mixture no. | IHS no. | version | IHS Release st | atus Release Dat | Release comment | Trade name | Standard mixt. no. REAC |
| Arti | icle | ANDIZ PR | KCMateri | 000000000000000 | | 1.00 | S - Kelease | 2015/08/31 | | | |
| 2 Arti | icle | Demo plu | ig red | Leoni1 | Leoni1 | 0.01 | / 0 - In Progr | ess | | | |
| 3 Arti | icle | DEMOPA | RI MS 05 | 000000000000000 | | 1.00 | 3 - Release | 2015/04/27 | | | |
| 4 Arti | icle | JSH1-KO | ND20 Te | 0000000030000 | | 1.00 | 3 - Released | 2015/04/28 | | | |
| 5 Arti | icle | JSH1-KO | ND21 | 0000000030000 | | 1.00 | 3 - Release | 2015/04/28 | | | |
| 6 Arti | icle | Demo plu | ig red | 12345 | 12345 | 0.01 | / 0 - In Progr | ess | | | |
| 7 Arti | icle | Demo plu | ig red | 12345 | 12345 | 0.01 | / 0 - In Progr | ess | | | |
| 8 Arti | icle | Demo plu | iq red | 12345 | 12345 | 0.01 | / 0 - In Progr | ess | | | |
| 1 | | ~ ' | | 100.15 | 100.15 | | 10.00 | | | | , |
| 1 | | | | | _ | | | | | | |
| | | | | Attention: all four | nd MDS | /Module | s will be used f | or analyzing, no | ot only the displayed | ones! | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | 6 | < Back | sage List | | | |
| _ | | | | | | | | | | | |

Figure 16: Analysis - Usage results



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3.3.3.4 Usage - Not pre-registered substances

The "Not pre-registered substances" section of the Analysis Wizard allows articles and mixtures to analyse the use of substances relating to the pre-registration date. The step 2 of the Analysis Wizard offers the following analysis parameters (See Figure 17):

- Without pre-registration
- Search for substances where no pre-registration date is set
- Pre-registration expires before the <date>
- Search for substances where pre-registration date expires before the selected date
- Also list IMDS wildcards (CAS-No. "system")
- The analysis wizard also searches for substances where a wildcard is set.
- Only list substances, which have at least a valid CAS-No., Einecs/Elincs or EU-Index
- The analysis wizard validates the CAS-No., Einecs/Elincs or EU-Index before selecting a substance

| Reports | Usage | | |
|--------------------|--|---|---|
| ct criteria for no | ot pre-registered substanc | es to search for (Usage of not p | re-registered substances): |
| t pre-regis | tration | | |
| istration ex | xpires before the | 2016/04/10 | |
| IMDS wild | lcards (CAS-No. "s | system") | |
| t substance | es, which have at l | east a valid CAS-No., | Einecs/Elincs or EU-Index |
| | Reports ct criteria for no t pre-regis istration e: IMDS wild t substance | Reports Usage ct criteria for not pre-registered substance t pre-registration istration expires before the IMDS wildcards (CAS-No. "s t substances, which have at I | Reports Usage ct criteria for not pre-registered substances to search for (Usage of not pre-registration t pre-registration istration expires before the 2016/04/10 IMDS wildcards (CAS-No. "system") t substances, which have at least a valid CAS-No. |

Figure 17: Analysis - Usage - Not pre-registered substances

The final step displays the analysed result. This includes the substances found, as well as their position within the analysed article or mixture. From here it is possible to jump directly to the position of the substance within the analysed article or mixture.

3.3.4 Data - PDM BoM import (SAM-M)

This feature allows to import Bill of Materials (BoM) files from external PDM systems. Three formats can be selected (.csv, .xml and .xls) as shown in Figure 18.

For more information for this function please see the separate user manual "PDM_standard_interface".



iPCA SAM-M - User Manual R13 PDM BoM import (SAM-M) Please choose the format and the file which is to be imported. File type: *.csv *.xml *.xls Start Cancel Figure 18: PDM BoM import

3.3.5 Data - PDM BoM import (VP)

The import parameters will be set as shown in Figure 19.

| O PDM BoM import (VP) | | × |
|-----------------------------------|--------------------------|--------|
| Please define VP's (part lists) f | or Import: | + |
| | | - |
| | | |
| Assigned Project: | | 8 |
| Mode: | Dynamic | \sim |
| Access: | Public | \sim |
| Product Status: | NPD - New Product Develo | \sim |
| | \$ | 6 |
| Expiry Date: | | |
| Email notification after job h | as been finished. | |
| Import | Cancel | |

Figure 19: Data - PDM BoM import

For information for this function please see the separate User Manual "VPM_usermanual".

3.3.6 Data - Substance Import

The Substance Import option allows users to update the safe use codes for REACH. In the future functionality will be increased to include adding substances directly to the database.

| Select File / Data Source Substance Import Wizard - Step 1 of 5 | | | | | |
|--|------------------|--|--|--|--|
| | Data source: | REACH Safe Use | | | |
| | Import type: | Import references only (Skip substances) | | | |
| | | Substance import only | | | |
| | | Substance import and assignment to group | | | |
| | Substance group: | 86 | | | |
| | Select file: | ک ک | | | |

Figure 20: Data – Substance Import



3.3.7 Data – Documents

The documents tab (See Figure 21) allows to search among all documents saved in the system.

| Documents | | | | |
|--|-------------------------------|---|-------------------------|---|
| Documents | | | | |
| Node name: Node no.: Valid until: Request status: | - 2016/07/19 III | Supplier: Node type: Material Type: Status | Active | (A) X |
| Description: Filename: Version no.: Version date: | Current Version | Usage scope: Document format: Document type: Language: | All | available V |
| | Search Reset | | | |
| Data | a te Docu Usage Versio Versio | Docu Node No | det Node Docu | Valid to Node Reque Ma |
| < | | | and any road in [Docum] | · · · · · · · · · · · · · · · · · · · |
| | Show Export Show no | Edit cont] Send Re | eq] [Completi] [New ve | ers |

Figure 21: Data - Documents

- Node name: The name of the article, mixture or substance
- Node No: The identifying number of the article, mixture or substance
- Valid until: The validity period of the document
- Request Status Allows filtering based on the following statuses
 - New request possible
 - Request no possible
 - Request in progress
- Supplier: Option to be able to select a supplier from the database in the system (Selectable by clicking the binocoluars on the right-hand side)
- Node Type: Refers to an article, mixture or substance
- Status: Following states are selectable; active, deleted or deactivated
- Document search attributes with Additional search features are:
 - Description:
 - Filename: write the
 - Version no.:
 - Version date:



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- Usage scope:
- Document format: pdf, word, image, URL, etc.
- Document type: certificate, conflict minerals, dossier, safety data sheet, etc.
- Language: different document languages can be selected

3.3.8 Data - EDAS XML import

Import of safety-data-sheets regarding to the EDAS-XML exchange standard.

| Please choose imported. | the node type and the file which is to be |
|----------------------------|---|
| File type: | • <u>*.xm</u> |
| Node type: | Article |
| | |
| | Start Cancel |

Figure 22: Data – EDAS XML import

3.3.9 Data – IPC1752 Import

This option allows the user to import a single or multiple IPC1752A Files into iPCA. Please note: The imported files must be in XML format and contain a Manufactures Part Number (MPN) and a DUNS number (Supplier Identifier). Please Note: If your instance of iPCA has DUNS disabled, the bulk import functionality will not be available.

| O IPC175 | O IPC1752 Import | | | | |
|------------|------------------|------------------|----------------------|----------|--|
| Please cho | ose the form | at and the file | which is to be impor | ted. | |
| ✓ Use dire | ctory scan for | multiple file in | nport | | |
| | | | | | |
| File type: | ○ *.csv | ● *.xml | ⊖ *.xls | | |
| | | | | - | |
| | | <u>S</u> tart | <u>C</u> ancel | | |
| | | | | | |

Figure 23: Data – IPC1752 Import

3.3.10 Data – Supplier Data Import (SAM-M)

This option allows the user to import supplier company information into iPCA. Imports are done in xlsx (Excel) format. Please Note: There is a specific template that the excel spreadsheet needs to be in, in order to this import to work. Should you not have the required template, please contact your administrator.



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| O Supplie | r Data Import | t (SAM-M) | | × |
|-------------|---------------|-----------------|----------------------|------|
| Please choo | ose the form | at and the file | which is to be impor | ted. |
| File type: | ○ *.csv | ⊖ *.xml | • *.xlsx | |
| | | | | - |
| | | <u>S</u> tart | <u>C</u> ancel | |
| | | | | |
| | | | | |
| | | | | |

Figure 24: Data – Supplier Data Import

3.3.11 Data – Supplier Contact Data Import

This option allows the user to import supplier contact information into iPCA. Imports are done in xlsx (Excel) format. Please Note: There is a specific template that the excel spreadsheet needs to be in, in order to this import to work. Should you not have the required template, please contact your administrator.

| O Supplier Contact Data Import | | | | | | |
|--------------------------------|--|---------------|----------------|----------|--|--|
| Please cho | Please choose the format and the file which is to be imported. | | | | | |
| File type: | ○ *.csv | ⊖ *.xml | • *.xlsx | | | |
| | | | | - | | |
| | | <u>S</u> tart | <u>C</u> ancel |] | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Figure 25: Data – Supplier Contact Data Import

3.3.12 Data – Commodity Import

This option allows the user to import the commodities used in iPCA. Imports are done in xlsx (Excel) format. Please Note: There is a specific template that the excel spreadsheet needs to be in, in order to this import to work. Should you not have the required template, please contact your administrator.

| O Commodity Import | | | | |
|--------------------|--------------|-----------------|----------------------|----------|
| Please cho | ose the form | at and the file | which is to be impor | ted. |
| File type: | ○ *.csv | ⊖ *.xml | • *.xlsx | |
| | | | | - |
| | | <u>S</u> tart | <u>C</u> ancel | |
| | | | | |
| | | | | |
| | | | | |

Figure 26: Data – Commodity Import

3.3.13 Data – Organization Structure Import

This option allows the user to import the organizational struture used in iPCA. Imports are done in xlsx (Excel) format. Please Note: There is a specific template that the excel spreadsheet needs to be in, in



order to this import to work. Should you not have the required template, please contact your administrator.

WARNING: Importing a replacement structure can cause parts and BOMs to disappear from the database. Be sure you understand what the requirements of an import are before you attempt an import. Should you have any questions, please contact your adminstrator.

| Organization Structure Import | | | | \times | |
|--|---------|---------------|----------------|----------|--|
| Please choose the format and the file which is to be imported. | | | | | |
| File type: | ○ *.csv | ⊖ *.xml | • *.xlsx | | |
| | | | | - | |
| | | <u>S</u> tart | <u>C</u> ancel | | |
| | | | | | |
| | | | | | |
| | | | | | |

Figure 27: Data – Organizational Structure Import

3.3.14 Data – Part Data Import

This option allows the user to import parts that are used in iPCA. Imports are done in xlsx (Excel) format. Please Note: There is a specific template that the excel spreadsheet needs to be in, in order to this import to work. Should you not have the required template, please contact your administrator.

| O Part Data Import X | | | | | | |
|----------------------|--|---------------|----------------|----------|--|--|
| Please cho | Please choose the format and the file which is to be imported. | | | | | |
| File type: | ○ *.csv | ⊖ *.xml | • *.xlsx | | | |
| | | | | - | | |
| | | <u>S</u> tart | <u>C</u> ancel | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

Figure 28: Data – Part Data Import

3.4 Options

3.4.1 Options - Tree Expanding

To adjust the structure of the product tree model, for different user requirements, the following options are available (See Figure 29):

- Ignore basic substances: If this function is executed, only the articles and mixtures are displayed in the product tree while substances are not visible. This makes the overview easier if you work with long bills of materials.
- Expand to level 10: Another function to optimize the overview of long bills of materials. The amount of the expanded levels (tree view) can be adjusted freely.



 Basic substances highlighting: Substances of particular groups and interests (e.g. GADSL) can be highlighted in the tree view.

| iPoint Comp | lian | ce Agent | | |
|----------------|------|---------------------|-----|---|
| File Edit Data | Op | tions Extras Wind | dow | Help |
| 🗴 🗅 🚺 🎤 | × | Tree expanding | + 🗸 | ignore basic substances |
| | 0 | Checks Parameter | | Expand to level 10 Basic Substance highlighting: GADSL |
| | | View | • | |

Figure 29: Options – Tree Expanding

3.4.2 Options - Tree Checks

Here the checking procedures and parameter relating to compliance with relevant regulations can be set (See Figure 30). For a more detailed description of this function please refer to the "iPCA/CSI Compliance Substance Inspector" manual. The following settings are possible:

- Check configurations: Here you can edit the existing test configurations or create new ones.
- Display inline: By activating ("\") the CSI-results will be displayed in the additional tab in the article window (see chapter 5.3.13). Otherwise, the CSI results will be displayed in a separate window.



Figure 30: Options - Checks

3.4.3 Options - Parameter

Here the further parameters regarding the conformity testing and supplier communication can be set (See Figure 31).



Figure 31: Options – Parameters



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3.4.3.1 Parameter – VP Parameter

Here the user can configure how BOMs are handled in the system. Configurations can include: Warnings before Expiry, Delete After Expiry, VP Manger (Email Address), Delete Warning and Default expiration date for automated imports. (See Figure 32).

| • VP Parameter | | |
|--|---------------|--|
| Warning before expiry (days) | 5 | |
| Delete after expiry (days) | | |
| VP Manager | | |
| Delete warning (days) | | |
| Default expiration date for automated imports (days) | 25 | |
| | | |
| Save | <u>C</u> lose | |

Figure 32: Parameter – VP parameter

3.4.3.2 Parameter - SEP Parameters

Here the standard components of a SEP-request (Email Address) like sender, subject, e-mail header, footer etc. can be pre-set. The sets are then able to be used repeatedly (see chapter 5.7.4.1).

| SEP Parameter | | | | | |
|-----------------------------|--|--|--|--|--|
| General Account E-mai | recipients (CC) E-mail default attachments | | | | |
| Email Sender: | demo@locahost.de | | | | |
| Email Subject: | Request for component declaration | | | | |
| Email Header: | test | | | | |
| Email Footer: | test | | | | |
| Dunning Header: | test | | | | |
| Number of days for due date | : (due date = creation date + x days) | | | | |
| Email Reminder Period: | 10 days | | | | |
| Escalation: | | | | | |
| Escalation Trigger: | 2 . Dunning Email | | | | |
| Escalation Header: | test dunning mail for testing only | | | | |
| Escalation Receiver: | andreas.schiffleitner@kerp.at | | | | |
| Declaration Type: | Partial declaration 👻 | | | | |
| Save Close | | | | | |

Figure 33: Parameter – SEP parameter



3.4.3.3 Parameter - PDM configuration

Here are parameters to define for the date exchange with a external SAP system (using iCCfSAP - iPoint Compliance Cockpit for SAP). For more information for this function please see the separate user manual " iCCfSAP User Manual ".

| 00 | Configure PDN | 1 interface 📃 🗖 🖂 |
|----|---------------|---|
| - | Rulegroup: | Version: PDM Rulegroup: |
| | System. | Circite |
| | | Search Reset |
| | Rulegrou | p Version PDM Rulegroup Client System Creator Creation date last editor Last change |
| | | |
| | | |
| | Rulegroup: | Version: Select rule group PDM Rulegroup: |
| | System: | Client: |
| | | New Edit Delete Save Cancel |

Figure 34: Parameter - PDM configuration

3.4.3.4 Parameter - REACH Request Parameter

The standard components of a REACH-request (Email Address) like sender, subject, e-mail header, footer etc. can be pre-set, the sets are then able to be used repeatedly. It has a high importance for requests that are sent as e-mails from the system automatically.

The following parameters can be pre-set (See Figure 35):

- Request language: The following four languages are available as standard: German, English, French and Spanish
- Email sender: The standard sender address. All outgoing requests use this email address as the sender
- Email subject: Title/subject line of the emails
- Email header: The standard salutation of the emails
- Email text: The standard text of the REACH requests
- Email footer: The standard footer formula of the emails.
- Info date: Number of days until the automatic release of the first reminder (starting from the first request)
- Info text: Standard text of the automatically generated reminder



- Warning/reminder date: Number of days until the automatic release of the warning/reminder (starting from the day the first request was made)
- Warning/reminder text: Standard text of the automatically generated warning/reminder
- Escalation (Dunning) date: Number of repeated reminders
- Escalation text: Text of repeated/escalation reminders
- Escalation receiver: The responsible person at the supplier's end who should be informed about the reminder at the same time

| 🖸 REACH Request Parameter 📃 🔲 🔣 | | | | | |
|---------------------------------|--|--------------|-----|--|--|
| Request lan | ger;en 🔹 | | | | |
| Email sender: | <unint></unint> | | | | |
| Email Subject: | REACh data is missing / REACh Daten fehlen | | | | |
| Email header: | This is an automatically generated message. For further information pl Dies ist eine automatisch generierte Nachricht. Sollten Sie weitere Info | eas orma | | | |
| Email Text: | REACh data is missing for your datasheet - please send us the necessa REACh Daten für Ihr Datenblatt fehlen - bitten senden Sie uns die notw | ry d vend | | | |
| | | 4 | III | | |
| Email footer: | With best regards IMDS department | • | | | |
| Info date: | -21 | | | | |
| Info text: | REACh data is still missing for datasheet as stated below. Supplier has REACh Daten für Datenblatt wie im Folgenden angegeben fehlen imme | not er n | | | |
| | < | P. | | | |
| Warning dat | -14 | | | | |
| Warning dat | REACh data is still missing for datasheet as stated below. Supplier has REACh Daten für Datenblatt wie im Folgenden angegeben fehlen imme | not er n | | | |
| | < | 4 | | | |
| Dunning dat | 7 | | | | |
| Dunning text: | REACh data is still missing for your datasheet as stated below. Please send REACh Daten für Ihr Datenblatt wie im Folgenden angegeben fehlen imme | | | | |
| | | ۲ | - | | |
| | Save Close | | | | |

Figure 35: Parameter -REACH Request Parameter

3.4.3.5 Parameter - iFlow Parameter

Used to set the parameters for iPoint iFlow Server for Web service missions. Please find a more detailed description of this feature in the separate "IHS user manual"



| iPCA | SAM-M – User Manual | R13 | | | |
|-----------------------|------------------------------|-----|--|--|--|
| | | | | | |
| • iFlow Parameter | - 0 🗙 | | | | |
| Base URL: | http://to_be_configured:8080 | | | | |
| Login Service Name: | missionservice/login | | | | |
| Mission Service Name: | missionservice | | | | |
| Username: | admin | | | | |
| Password: | •••• | | | | |
| Sav | Save Close | | | | |

Figure 36: Parameter - iFlow Parameter

3.4.3.6 Parameter - CSI parameter

This parameter is used if the portion of a basic substance is defined by a threshold range. During a CSI check of such a basic substance the portion type as defined in the parameter is used as comparison value for the threshold of the rule.

Settings of the CSI-module. Please find a more detailed description of this feature in the separate user manual "iPCA/CSI Compliance Substance Inspector", chapter 6.2.

| CSI Parameter | | - 0 🔀 |
|---------------------------------|------------|-------|
| Warning phase | 100 | |
| Type of portion to use in check | To value 🔻 | |
| Email Sender Ty | Central 🔹 | |
| Central Email Se | | |
| Email Subject: | | |
| Email Header: | | |
| Email Footer: | | |
| | Save Close | |

Figure 37: Parameter - CSI Parameter

3.4.3.7 Parameter - Welcome message

Welcome messages are messages for users that are displayed once after login.

| Welcome message | | - • • |
|---------------------------|---|-------------------|
| Please edit the draft for | he welcome text: | |
| | | |
| | Save Reset | 0 chars left |
| | | |
| The currently active weld | ome text - it will be showed exactly once to each u | user after login: |
| | | |
| | | |
| | | Close |

Figure 38: Parameter - Welcome message



3.4.3.8 Parameter - REACH Wizard

Select of the CSI rules and set the relevant date for the compliance check. Please find a more detailed description of this feature in the separate "REACH user manual"

| Due date: | | |
|-------------------|-------------------------|-----------------|
| CM-Module US | Conflict Minerals (Ver | sion: 2) |
| CM-Module US | Conflict Minerals (Ver | sion: 1) |
| Proposition 65 (| (Version: 2) | |
| Proposition 65 (| (Version: 1) | |
| Proposition 65_ | articles (Version: 1) | - |
| Proposition 65 | material&semicompo | nents (Version: |
| Proposition 65 | mixtures (Version: 1) | |
| REACH Annex X | IV (Version: 9) | |
| REACH Annex X | IV (Version: 8) | |
| REACH Annex X | IV Sunset Date (Versio | on: 5) |
| REACH Annex X | IV Sunset Date (Versio | on: 4) |
| REACH Annex X | IV latest application (| /ersion: 5) |
| REACH Annex X | IV latest application (| /ersion: 4) |
| REACH Annex X | VII (Version: 7) | |
| RISL (Version: 2) | | |
| RoHS (2011/65/ | (Version: 12) | |
| RoHS (2011/65/ | (Version: 11) | |
| • | III | |

Figure 39: Parameter – REACH Wizard



Figure 40: Parameter – Password security



3.4.3.9 Parameter - REACH report parameter

| IHS | | | | | |
|-----|--|--|--|--|--|
| ~ | | | | | |
| 0.1 | | | | | |
| | | | | | |

Figure 41: Parameter – REACH report parameter

3.4.3.10 Parameter - RoHS report Parameter

| Substance grou | compliance 🔹 |
|----------------|--------------|
| Substance grou | • |

Figure 42: Parameter – RoHS report parameter

3.4.4 Options - view

Several view styles of the user interface are available. The changes will take effect after restart



Figure 43: Options - Overview

3.5 Extras

3.5.1 Extras - Management

A management window for:

User and roles management



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- System and database configurations (available only for system administrator)
- First the login window will be opened (for user and roles management no password is required)

| ? | The management module offers an iPoint-admin mode. This can be activated by the input of the correct password. Activate admin mode? |
|---|---|
| | OK |

Figure 44: Management: login window

After clicking on "OK" a new window opens where the system user and roles can be defined and edited.

| Users | Roles | Configu | ration | Database a | dministration | | | | | |
|------------------------|-------|-------------|--------|------------|---------------|-------|--|-------------------------|------------|----------|
| J <mark>serna</mark> m | ie: | | | | Full na | ime: | | | Search | Reset |
| Users | | - | | Username | Full name | State | Last Login Date | OrgUnit | Department | Language |
| lnte | rnal | | 1 | | - | 1000 | Contraction of the local division of the loc | COLUMN A DESCRIPTION OF | | en |
| 2 | | 1 | 2 | | | | | | | en |
| | | | 3 | | | | | | | en |
| | | - | 4 | | | | | | | en |
| | | | 5 | , | | | | | | en |
| | | | 6 | | | | | | | de |
| | | | 7 | | | | | | | en |
| | | | 8 | C | | | | | | en |
| | | | 9 | | | | | | | en |
| | | | 10 | C | | | | | | en |
| | | | 11 | 1 | | | | | | en |
| | | | 12 | | | | | | | en |
| | | | 13 | | | | | | | en |
| | | | 14 | | | | | | | en |
| | | | 15 | | | | | | | en |
| Exte | ernal | | 16 | | | | | | | de |
| | | 1.1.1.1.1.1 | 17 | | | | | | | en |
| | | | 18 | 8 | | | | | | en |
| | | | 19 | 9 | | | | | | de |
| | | | 20 | | | | | | | en |
| TL | | | 21 | | | | | | | de |
| - | | | 22 | | | | | | | en |
| T | | | 23 | | | | | | | en |
| | | | 24 | - | | | | | | en |
| ⊨ ∎ | | | 25 | | | | | | | en |
| | | | 1 | | 111 | | | | | |
| 1 | | | | 1 | | | 2.6 | 3 | | |

Figure 45: Management: window for user, roles and system configuration settings

For more information for this function please see the separate User Manual "User-Management".

3.5.2 Extras - CSI Management

In the CSI-Management tool search window the relevant substance group has to be found (or a new one created) and opened in the edit-mode. In the edit-window the type of a substance group can be created by clicking on the "Document" icon.



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| 10 | e Data Help | | | | | | |
|----|--|-----------------------------|--|---------------|-----------------|---------------|---|
| | Ibstance Groups Rem | narks Rules Rule Group | s | | | | |
| | Name: | | Co | de: | | | |
| | Version [.] | | Tvr | e. | [| | |
| | , croionn | Released | | | 🗖 Only d | eleted | |
| | | Search Reset | | Info: 147 row | s found! | | |
| ľ | Name | Code | Type | Version | Release | Released by | Release date |
| ļ | 1 Conflict Minerals 3 | TG 0715 | USA | 1.00 | Yes | RAMON | 2015/07/20 |
| ĺ | 2 IMDS application d | iscrepancy | 1 | 1.00 | 100 | TO ATTICATA | 2013/01/20 |
| ĺ | 3 SVHC ECHA notifica | ation 12 - 17.06 1215 | iPoint-SVHC | 1.00 | Yes | RAMON | 2015/12/18 |
| ĺ | 4 SVHC Candidate Lis | st 17 12 2015 1215 | iPoint-SVHC | 1.00 | Yes | RAMON | 2015/12/17 |
| ĺ | 5 RISL D(FA) - all app | lications 0216 | iPoint-RISL | 4.00 | Yes | RAMON | 2016/02/08 |
| | < <u> </u> | | · · · · • • • • • • • • • • • • • • • • | 1 00 | | B | 0.04 0 100 105 |
| | Name: | Conflict Minerals 3TG | T | vpe: | USA | | . |
| | Code: | 0715 | V | ersion: | 1.00 | | |
| | Released: | V | • | ersion. | 1.00 | | I) |
| | contained Pasic | | | | 1-4 | | |
| | Cultaneu basic | Name | CA | S No. EU-Ind | ex Einecs/Elinc | s Synonym 1 S | Synonym 2 Syn |
| | Substances: | TributyIstannyl abieta | te 262 | 39-64050-00 | 8 247-531-6 | | |
| | | 2 Diisooctyl 2,2'- (Dime | thylstannyle 266 | 36-01 | 247-862-6 | | |
| | | 3 Dibutyltin di(acetate) | 106 | /-33-0 | 213-928-8 | | |
| | | 4 2-ethylnexyl 10-ethyl | -4,4-almethy 5/5 | 83-35 | 260-829-0 | 8-Oxa-3,5 | |
| | | S Xanthylium, 3,6-Bis(ei | nylamino)-9 859 | 59-61 | 289-056-7 | | |
| | | 7 Cohalt titanium tungo | top ovide ((144 | C-10-C | 214-088-7 | | |
| | | 8 Vanthylium 0 (2 carb | (i.i. 144 | 457-0 | 215 /12 2 | | |
| | | 9 Tributy/(neodecapov/ | (0,0) $(0,0)$ $(0,0$ | 01_69 | 210-413-5 | | and the second se |
| | | | HEYANOATE 503 | 5-67-6 | 275-726-7 | | |
| | | 11 Tributyltin bromide | 146 | 1-23-0 | 215-959-2 | | |
| | | 12 Triethyltin acetate | 190 | 7-13-7 | 217-609-4 | | |
| | | 13 Trimethyltin acetate | 111 | 8-14-5 | 217 005 4 | | |
| | | 14 Tri-n-butyl tin salicyla | ate 434 | 2-30-7 | 224-397-7 | | |
| | | 15 Dibutyltin isooctanoa | te 857 | 02-74 | 288-265-0 | | . |
| | | • | 111 | | | | P. |

Figure 46: Extras - CSI-Management: substance group – type definition

Own substance groups can be created in the substance groups tab. This functionality is also available within the IHS, it can be found in the menu Extras \rightarrow Master data \rightarrow substance groups types



| νCA | | | SAM-N | I – User Ma | anual | |
|-----|--------|-------------------|----------------------|---------------------|------------|--|
| | | | | | | |
| Su | ubstar | nce group types | | 1.0 | | |
| 1 | | Name | | | | |
| | 1 | GADSL | .1 | | | |
| | 2 | Compliance | P | | | |
| | 3 | IHS | | | | |
| | 4 | N2580 | | | | |
| | 5 | Fremdstoff | | | | |
| | 6 | RoHS | | | | |
| | | | | | | |
| - | Nar | me: | Compliance | | | |
| | Cre | ator: | Michael Bierkandt (S | Creation date: | 2010/05/12 | |
| | Use | er (last change): | | Date (last change): | | |
| - | | Apply | New | Edit | Delete | |

Figure 47: Extras - CSI-Management: substance group types

For more information for this function please see the separate User Manual "iPCA/CSI Compliance Substance Inspector".

3.5.3 Extras – DB - Job Manager

The Database Job manager can be used to supervise internal HIS DB Jobs and receive their results. Jobs are created automatically by defined processes to avoid that long running processes block the application. The processing is done in the database and therefore independent from the szstem of the application.

The Job Manager is e.g. used for the bulk roundtrip export, because this might be a long running process which exports hundreds or thousand of MDS.

The manager contains the two tabs "iMDS DB/Jobs" (See Figure) and "iMDS DB/Job History" (Figure). In the first tab all jobs are shown which are beign currently ejecuted or are waiting for execution, the second tab comprises the results of the jobs.

| | | istory | | | | | | | | |
|---------|--------|--------|------------|---------|------------------|-------|------------|------------|--------|-------|
| Name: | | | | | State: | | All | | | |
| ID: | | | | | | | | | | |
| | Search | Rese | t | 1 | Info: 1 row four | nd! | | | | |
| Data | | lum | A land min | Lastain | Tabalilara | Chata | (Colleges) | Current | | C |
| ID Name | | User | INext run | Lastrun | Total time | State | Failures | Successiui | Action | scope |

Figure 48: Extras – DB-Job Manager



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| Name: | | | S | tate: | All | | | | |
|-------|-------------------------------|-------|----------|---------------------|-----|------------|----------|----------|-----|
| ID: | | | u | lser: | | | | | |
| | Search Reset | | In | fo: 40 rows found! | | | | | |
| ata | | , | | | | | | | |
| ID | Name | User | Next run | Last run | | Total time | State | Failures | |
| 341 | Compliance check for model no | IPCA | | 2016/03/15 10:31:43 | PM | 0:00:02 | Finished | 0 | |
| 2 321 | VWN SAMM SubstanceUsageList | Maria | | 2016/03/10 11:51:43 | PM | 0:00:04 | Finished | 0 | |
| 313 | Compliance check for model no | IPCA | | 2016/03/10 10:51:43 | PM | 0:00:00 | Finished | 0 | |
| 312 | Compliance check for model no | IPCA | | 2016/03/10 10:53:43 | PM | 0:00:00 | Finished | 0 | |
| 1211 | Compliance check for model no | IDC D | | 2016/03/10 10:49:43 | DM | 0.00.00 | Finished | n | |
| | | 111 | | | | | | | .) |

Figure 49: Extras – DB-Job History

3.5.4 Extras - Master Data

3.5.4.1 Companies / Legal Units / Partners / Contacts

The data administration (See Figure 50) unifies the saving and archiving of company master data and contacts including managing of:

- Company specific data via the location or external legal units and their contact persons
- Company data of suppliers with supplier-specific legal units and their contact persons
- Customer data with customer-specific legal units and their contact persons



Figure 50: Master Data - Management of Companies /Legal units /Contacts

3.5.4.1.1 Companies / Legal Units / Contacts - Search



After starting the function "Companies/Legal units/Partners" a search window, where you can search and edit the filter parameter for different search results for the saved company data, will be opened (see Figure).

| Name: | Supp Co | mpany-/(| DraUnit-I | D: 🗍 🗖 Cor | npanies onl | v Risk assessmen | t | | - |
|--|--|------------------------|-------------------------------|-------------------------------|----------------|----------------------------------|---|----------|---|
| Orgunit | DU | NS Num | her: | | | Type: | | | • |
| org.unit. | | NJ NUIII | | | | type. | | | |
| ZIP code / City: | Co | ntact Per | son: | | | Supplier/Custo | mer Code: | | |
| Country: | 8 | | | | | | | | |
| | Search Res | et | | Info | : 112 rows fo | ound! | | | 3 |
| Data | | | | | | | | | |
| Company | Org. Unit Name | Org | Zip | City | Country DI | JN Supplier/C | Risk Kind of org. | OEM | |
| 1 SUPPLIER2Test | SUPPLIER2Test | -7826 | 12345 | Berlin | DE | SUPPLIER2T | IHS Company | No | - |
| 2 SUPP Lieferan | SUPP Lieferant | 8762 | 12345 | BRD | DE | 000000027 | IHS Company | No | 1 |
| 3 SUPP Lieferan | SUPP Lieferant | 8444 | 12345 | BRD | DE | 0000100595 | IHS Company | No | |
| 4 SUPP Lieferan | SUPP Lieferant | 8502 | 12345 | BRD | DE | 0000100619 | IHS Company | No | |
| 5 SUPP Lieferan | SUPP Lieferant | 8512 | 12345 | BRD | DE | 0000100622 | IHS Company | No | |
| | SUPP Lieferant . | 8784 | 12345 | BRD | DE | 000000030 | IHS Company | No | |
| 6 SUPP Lieferan | C 1' 0001 | 0672 | | Vienna | AT | S2001 | IHS Company | No | |
| 6 SUPP Lieferan 7 Supplier2001 | Supplier2001 | -00/2 | | | | CLIDDI 1 | THE Company | No | |
| 6 SUPP Lieferan 7 Supplier2001 8 SupplierName | 1 SupplierName 1 | -7592 | J3B 7Y5 | ST-LAUR | CA | SUPPL I | Ins Company | | |
| 6 SUPP Lieferan 7 Supplier2001 8 SupplierName 9 SupplierName | 1 SupplierName 1 SupplierName 1 | -7592 -7594 | J3B 7Y5 H4R 2J5 | ST-LAUR ST-LAUR | CA CA | SUPPL 1 SUPPL 10 | IHS Company IHS Company | No | |
| 6 SUPP Lieferam 7 Supplier2001 8 SupplierName 9 SupplierName 10 SupplierName | 1 SupplierName 1 SupplierName 10 SupplierName 1. | -7592 -7594 7596 | J3B 7Y5 H4R 2J5 H4R 2J5 | ST-LAUR ST-LAUR ST-LAUR | CA CA CA | SUPPL 1 SUPPL 10 SUPPL 100 | IHS Company IHS Company IHS Company | No No | |

Figure 51: Master Data - Management of Companies /Legal units /Contacts - Search and filter functions

3.5.4.1.2 Companies / Legal Units / Contacts – Creation and Editing

If the required Supplier or Customer is found and marked by clicking the "Edit" icon (see Figure) a new window can be open. Here the relevant supplier data can be entered or edit (see Figure).

| Company data Organis | sation unit Contacts | | | | | |
|------------------------|------------------------|--------------------|-------|------|--------|--|
| Data: | | | | | | |
| Name | SUPPLIER2Test | Id: | -7826 | | | |
| Street: | | ZIP code / City: | 12345 | Berl | Berlin | |
| Mailbox: | | Country: | DE | | | |
| Kind of Scope: | IHS Company | DUNS Number: | | | | |
| Examination Office: | | | | | | |
| Language for correspen | | Country (correcte. | . [| æ | X | |
| Supplier/Customer Code | Supplier/Customer Code | | | | + | |
| Risk assessment: | | • | | | | |
| Risk criteria: | | | | | | |
| | | | | | | |

Figure 52: Master Data - Management of Companies /Legal units /Contacts - Company Data



In the following chapters the editing of the contents is described (for newly created companies or for the editing of existing entries).

3.5.4.1.2.1Companies / Legal Units / Contacts - Company Data

A company can includes data about legal units, multiple customer codes and a risk assessment In the tab "Address" the following master date can be created or edit:

- Basic Information: Name, Address, ID, etc.
- Type of Legal Unit: There is a differentiation between headquarters (IHS) and further locations/legal units.
- Examination Instance: The legal unit used can be defined as "Examination Office" (responsible for the release of preparations and mixtures in the company). This checkbox is only viewable, if the responsibilities are set to the state ,EXAMINATION_OFFICE_MANAGEMENT'
- DUNS Number: Entry of the international DUNS-Number (Data Universal Numbering System) if available.
- Risk Assessment: Definition of the company specific risk state based on predefined criteria: 'No Risk', 'Low Risk', 'Medium Risk' and 'High Risk'.
- Risk Criteria: Own descriptions of the risk or supplier-oriented comments as defined by the user.
- Supplier/Customer Code:

Company Data - Release for departments (optional)

Additionally to the company master data attributes panel described below there is the possibility to release articles and mixtures for departments. Organization units which are flagged as an examination office have the possibility to set release state, release date and remarks. As soon as all examination offices have granted approval the release state for the departments is set to "released" automatically (see Figure 11).

The following requirements apply to this functionality:

- The configuration parameter "EXAMINATION-OFFICE" is active (see Figure) (to start: menu "Extras" → "Master data" → "Companies / legal units / contacts")
- The permission EXAMINATION_OFFICE_MANAGEMENT is in the User-Management available (see Figure 10) (to start: to start: menu "Extras" → "Management")
- The user who wants to release the mixture / article for the department is assigned to an examination office.



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Figure 10: Master Data - User-management: authorization for "Examination_Office_Management"

| ¥ Lube oil | | | | | | | | | - (f 💌 | |
|---------------------------|---|---------------------------|---------------|---------------------------------------|-------------------|---------------|------------------------|-----------------------|-----------|--|
| | 🦉 💞 🕶 🕯 | 0 🖻 🖌 🛛 | 🖻 🌒 🖥 | à (PC | | Git/View Exar | mination office states | 2 | x | |
| V Lube oil | Ingredients | | | | | Org. name: | Department of safet | ty at work | | |
| Calcium soap for lubrica | IHS Classification | & Labelling GHS Classific | ation & Labe | elling Characterisation Trans | oort Waste disp | State: | Released | • | | |
| Further Additives, not to | Current state: - | | | | | Release Date | 2011/10/06 | | | |
| | Assigned org-unit(s) | | | | | Remark: | Please check the sec | curity restrictions. | | |
| | | | | | | | | | | |
| | Org-unit Id | Org-unit Name | e | quantity [tone] U | Jnit | | | | | |
| | 1 -277694 | Laboratory | | 0 | | | | | | |
| | | | | | | | | | ecurity r | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | Ora-Unit d | etails | | | | | |
| | Usage General | Storage location Respo | nsible persor | n Documents | | | | | | |
| | REACH role: Manufacturer Importer Information Neither nor | | | | Actions | | | h | | |
| | no territore | Downstream user (DU) | | | | | Save | Cancel | | |
| | Release date: | | Releas | seinformation of eximination offices: | | | | | | |
| | State: | Active/Released | • | Org. Name | State | R | elease date | Remark | | |
| | Substance type: | | • 1 | Internal audit office | Released | 20 | 011/06/14 | P | | |
| | Safety data sheet | | • 2 | Department of safety at work | Released | 20 | 011/10/06 | Please check the secu | rity r | |
| | Safe Work Instruction: | | ▼ 3 | Department of environment protecti | on Released | 20 |)11/10/10 | | | |
| | Work instruction: | | <u> </u> | | | | | | | |
| | Amount [per unit] | 0 | - | | | | | Edit | | |
| | | | | Org-unit REAC | H Wizard | | | | | |
| | | | | REACH Wizard | ave Cancel | | | | | |
| | KEACH WIZard Save Cancel | | | | | | | | | |

Figure 11: Master Data - Release mixture / articles for departments

3.5.4.1.2.2 Companies / Legal Units / Contacts - Organization Unit

Use this tab to create and edit sub-units of the company (locations, legal units, etc.). The input mask is divided into two areas: the master area (upper part) and the detail area (lower part).

All existing sub-units are listed as tables with the usual data such as unit-designation/name and ID, address, ZIP code, DUNS-No and type of organization and are displayed in the master view (see Figure 12).

Additional risk assessments and risk criteria are displayed in the detail view. All relevant data can be edited and new sub-units can be created here.



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| ompany data Organisatio | n unit Contacts | | | |
|-------------------------|--|-------------------|-------|---|
| Cust.Org.Unit ID Name | Supplier Codes ZIP code City DUNS Numb | ber Kind of org. | | |
| Data: | | | | |
| Name | | Id: | -7826 | |
| Street: | | ZIP code / City: | | |
| Mailbox: | | Country: | | |
| Kind of Scope: | IHS Company | DUNS Number: | | |
| Examination Office: | | Parent Org.Unit: | | |
| Language for correspen | M | Country (correcte | | |
| Supplier/Customer Code: | Supplier/Customer Code | | | + |
| | | | | - |
| | | | | |
| Risk assessment: | | •] | | |
| | | | | |

Figure 12: Master Data - Management of Companies /Legal units /Contacts - Organization unit

3.5.4.1.2.3 Companies / Legal Units / Contacts - Contacts

Different partners and their contact data can be created and edited, as it was previously shown with the sub-units before, in this tab (see Figure 13).


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| C | mpany data C | Organisation unit Contact | s | | |
|---|---|-------------------------------------|-------|-----------------------------------|------------------------------|
| С | ntact Person | | | Telephone No.: | Search Reset |
| | Name Name SUPPLIER2Te | Username est, RADHIKA.MOHAN 880Q | Phone | Fax Email radhika.mohan@ipoint | Department Mailbox IMDS type |
| 9 | r : | | | | |
| | Firstname: Lastname: Telephone No.: | SUPPLIER2Test | | | |

Figure 13: Companies / Legal Units / Partners / Contacts - Contacts

3.5.4.2 Master Data - Physical- / Technical properties

The physical-/ technical properties includes the article/mixture characteristics as pH-Value, flash point, odour, colour, etc. It is possible to define own properties or edit the existing ones.

3.5.4.2.1 Physical Properties

Substances and mixtures are specified by their physical and chemical properties (menu "Extras"). These properties can be created and edited by using the "Physical properties master data" dialog window (See Figure).

Additional to the main title "Name", the properties can be described in five languages: German, English, French, Spanish and Chinese. The main title "Name" has to be defined in every case because it contains a key position for every further consideration (see Figure 14). It is strongly recommended to use English for the main title "Name". Additional entries in the other languages are optional.



| O Physica | l properties masterdata | 3 | | × |
|-----------|-------------------------|----------------------------------|----------------------------|-------|
| | English French | | show deleted re | cords |
| | German Spanish | Search | Reset Info: 37 rows found! | • |
| Data | | | | |
| 2 | Language | Description | | |
| 1 | 📆 en | modulus of eleasticity | | |
| 2 | 🔠 en | compressive strenght | | |
| 3 | en 🔤 | Heat expansion | Create text block | |
| 4 | en 🗄 | yield strenght | | |
| 5 | 👬 en | specific electrical resistance | | Ξ |
| 6 | en 📰 | specific heat | | |
| 7 | en en | thermal conductivity | | |
| 8 | en 📰 | thermal coefficient of expansion | | |
| 9 | en 📰 | Flash point 1 | | |
| 10 | 🔠 en | Flash point | | |
| 11 | 📰 en | Ignition temperature | | |
| 12 | 🔠 en | Pourpoint | | |
| 13 | 📰 en | Sinter temperature | | |
| 14 | 🔠 en | Drop point / drop range | | |
| 15 | 🔠 en | Cristallisation point | Save Cancel | |
| 16 | en 🔠 | Cloud point | | |
| 17 | en 📰 | Raising point | | |
| | [] | | | |
| Ne | ew Edit | Copy Delete | | |

Figure 14: Master Data – Physical properties

3.5.4.2.2 Test conditions

In addition to the physical properties of substances and mixtures, further test properties of a substance or mixture can be defined (see Figure 15). The use of the dialogue window "Test Conditions" is similar to the use of the dialogue window "Physical Properties" (See 3.5.4.2.1).



| | | | Show deleted reco |
|----------|----------|-------------|----------------------------------|
| 7# | English | | |
| | French | | |
| V | German | | |
| | Spanish | | Search Recet Info: 20 rows found |
| ata | | | |
| 2 | | D | |
| \$ | Language | Description | |
| 1 | en 🔤 | 62HRc | |
| 2 | 📷 en | 60HRc | Create text block |
| 3 | en 📰 | 56HRc | |
| 4 | 📷 en | 600 °C | |
| 5 | 📷 en | 300 °C | |
| 6 | 🔠 en | 100°C | |
| 7 | 💻 de | test | |
| 8 | 💻 de | test | |
| 9 | 💻 de | 62HRc | |
| 10 | 💻 de | 60HRc | |
| 11 | 💻 de | 56HRc | |
| 12 | 💻 de | 600 °C | |
| 13 | 💻 de | 300 °C | |
| 14 | 💻 de | 100°C | Save Cancel |
| 15 | 💵 fr | 62HRc | |
| 16 | 🚺 fr | 60HRc | |
| 17 | 💵 fr | 56HRc | |
| - 1 | | | 4 |

Figure 15: Master Data - Test Conditions

3.5.4.2.3 Odour

In addition to the physical properties of substances and mixtures, the odour of a substance or mixture can be defined (see Figure 16). The use of the dialogue window "Odour" is similar to the use of the dialogue window "Physical Properties" (see chapter 3.5.4.2.1).

| O Od | our | | | | - • × |
|------|------------------------|--------|-------------------------|-----------------------------|----------------------|
| | i English Me German | | | | show deleted records |
| Dat | a | | Search | Reset Info: 477 rows found! | |
| × | Language | | Description | | |
| 1 | | 🗮 en | odourless | | * |
| 2 | | 🔠 en | pungent | Create text block | |
| 3 | | 击 en | rancid | | |
| 4 | | 击 en | sharp | | |
| 5 | | 💼 en | rotten | | |
| 6 | | 击 en | earthy | | |
| 7 | | 📾 en | acidic | | |
| 8 | | 🚌 en | stinging | | |
| 9 | | 🚌 en | fruity | | |
| 10 | | 击 en | characteristic | | |
| 11 | L | 🔠 en | Hydrocarbons, aromatic | | |
| 12 | 2 | 🔠 en | Hydrocarbons, aliphatic | | |
| 13 | 3 | 💼 en | Cyclohexanone | | |
| 14 | 1 | 🔠 en | Butyric acid | Save Cancel | |
| 1 | 5 | 💼 en | Acetic acid | | |
| 10 | 5 | 🔠 en | Fatty acid | | |
| 17 | 7 | ata en | Ether | | |
| • | | E-mail | | III | • |
| | New | Edit | Copy Delete | | |

Figure 16: Master Data - Odour



3.5.4.2.4 Colour

In addition to the physical properties of substances and mixtures, the colour of the substance or mixture can be defined (see Figure 17). The use of the dialogue window "Colour" is similar to the use of the dialogue window "Physical Properties" (see chapter 3.5.4.2.1).

| 🔘 Colou | r | | | × |
|---------|-----------------------------|---------------|------------------------------------|-------|
| | English French German | | show deleted re | cords |
| | | | Search Reset Info: 116 rows found! | |
| Data | | | | |
| × | Language | Description | | |
| 1 | 🗮 en | test englisch | | |
| 2 | 🚟 en | Gras Green 2 | | _ |
| 3 | 🔠 en | Gras Green | Create text block | - |
| 4 | 🚟 en | silvery grey | | |
| 5 | 🚟 en | light beige | | |
| 6 | 🔠 en | dark beige | | |
| 7 | 🔠 en | pigmented | | |
| 8 | 🚟 en | metallic | | |
| 9 | 🔠 en | cream | | |
| 10 | 🚟 en | dark amber | | |
| 11 | 🚟 en | amber | | |
| 12 | 🚟 en | dark pink | | |
| 13 | 🔠 en | light pink | 🗗 🗮 en 💻 de 🔛 es 🚺 fr | |
| 14 | 🔠 en | pink | | |
| 15 | 🔠 en | beige | Save Cancel | |
| 16 | ats en | bronze | | |
| 17 | 📷 en | copper | | - |
| < _ | E and | | • III | |
| | lew Edit | Сору | Delete | |

Figure 17: Master Data - Colour

3.5.4.3 Master Data – Hazard Classification

Classifications organize the articles/mixtures in standardised groups and expand search and analysis of them. Two clasificatrion types are possible:

- Risk or safety phrases (R- and S-Phrases
- Hazard and Precautionary Statements (H&P)

For more information for this function please see Chapter 5.4.2.2.

3.5.4.4 Master Data – Sites

Sites (Applications) can be used to localize products/mixtures or materials, for example for storage or sales by countries (within the organization).



| 0 | Sites | | | | | | | | | | × |
|---|--------------|-------------|----|-----|--------|------|----|------|-------|--|---|
| | Name | Description | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| - | Name: | | | | | | | | | | |
| | Description: | | | | | | | | | | |
| - | | New | Ec | lit | Delete | Save | Ca | ncel | xport | | |

Figure 18: Master Data – Sites

3.5.4.5 Master Data - Classifications

Classifications organize the articles/mixtures in logical groups and expand search and analysis of them. It is possible to create an own classification in addition to the IMDS and ISO.

| Clas | sification | | | | × | |
|------|--|----------------|-------------------|---------------|--------------------|--|
| | English French German Spanish | | Type: | sho | ow deleted records | |
| Data | | | Search Rese | t Info: 10 ro | ows found! 🔳 | |
| | Language | Classification | Name | Type | ISO Classificat | |
| 1 | 🛲 en | Cement | Cement | IHS | | |
| 2 | 🖮 en | Elastomers | Elastomers | ISO | | |
| 3 | 🖮 en | Fluids | Fluids | ISO | | |
| 4 | 🛲 en | Glass | Glass | ISO | | |
| 5 | 🔤 en | Metals | Metals | ISO | = | |
| 6 | 🔤 en | MONM | MONM (Modified. | ISO | | |
| 7 | 🎟 en | Others | Others | ISO | | |
| 8 | 🎟 en | Polymers | Polymers, excludi | . ISO | | |
| 9 | 🗯 en | US CM | valid certificate | IHS | . | |
| 1 | | | | 1110 | • | |
| Ne | New Edit Copy Delete | | | | | |

Figure 19: Master Data – Classifications

3.5.4.6 Master Data – CSI Due Dates

Due dates for the Compliance Checker are necessary for the mass check of MDS/Modules. They ensure that only certain due dates are used for checking the data. These due dates might refer to dates on which legal changes applz. Another benefit is that the amount of data (violation of rules) which is generated during the check of a complex MDS/Module can be minimized because the results of a check are stored only once per due date (See Figure 20). More information can be found in the CSI User Manual chapter 6.3.



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| 0 | CSI Due Dates | | - 🗆 🗙 |
|---|-------------------|-----------------------------|-------|
| - | Due date: | Description: | |
| | | Search Reset | |
| | Due date Descript | ion | |
| | | | |
| | | | |
| Q | | | |
| | Due date: | Description: | |
| | State: | □ active | |
| - | | New Edit Delete Save Cancel | |

Figure 20: Master Data - CSI Due Dates

3.5.5 Extras - Memory Director

This function shows you the current memory usage of the system.



Figure 21: Extras – Memory Monitor



3.6 Window

Here you can define your favorite window view.

| iPoint Compliance Agent | /4A 🥥 2000 10 111 | HOME | INSERT. | DESIGN | |
|-------------------------------|---|------|---------|--------|----------------------------------|
| File Edit Data Options Extras | Window Help | | | | |
| 8 D T / Ø & | Arrange Tile Vertical Tile Horizontal Cascade | | | | Alt+T Alt+V Alt+H Alt+C |
| | 1 test_RoHS-Ex_20150828 2 Materialtext1 | | | | Alt+1 Alt+2 |

Figure 22: Window - Overview

3.7 Help

This tab describe the process of assisting the user with a problem.



Figure 23: Help Overview

3.7.1 Help - Contents

Include all cited manuals related to the software, e.g. HIS, REACH, CSI, etc.



| iPCA | SAM-M – User Manual | R13 |
|--|---|-----|
| | | |
| 🖊 🗅 :: iPoint Cor | mplia × 🔁 | |
| ← → C □ ip | svmsabb-t.rt.ipnt.de:8080/abb-test-ipca/help/en/index.html?hide=6 | |
| USER MANUALS GEN | IERAL DOCUMENTS CUSTOMER AREA HISTORY | |
| U | ser Manual | |
| | | |
| iMDS/IHS Usermanual » | | _ |
| - | | |
| iMDS/IHS Extension » | | |
| | | |
| iMDS/SCM/USC Userman AIC Usermanual > | ual > | |
| | | |
| iMDS/LCM Usermanual » | | |
| | | |

Figure 24: Help – Available (cited) manuals

3.7.2 Help – Send log file

This tab can be used for request support by iPoint. If you already have a support history related to the problem you can include the ticket number.

| Send log file | × |
|---------------------------------|---|
| Are you sure to send the log fi | le to the support team of iPoint-systems? |
| support ticket if available | : |
| Support Ticket: | (e.g. ICSC-1234 or SDCS-1234) |
| Reason: | |
| | |
| | |
| | |
| | Yes No |

Figure 25: Help - Send log file



3.7.3 Help – About

This tab include all general information related to the software including the system details, JVM Details and Statistics.

| 🔘 iPoint Compliar | nce Agent |
|---|----------------------------------|
| Copyright © 2003-2016, iPo | int-systems gmbh |
| All Rights Rese | rved |
| System Detail | S |
| Client: Version V11.07.000 (overHttp) | |
| Server: http://ipsvmsabb-t.rt.ipnt.de:8080/al | ob-test-ipcaserver/GenericServle |
| DB Version: V1107000 | |
| DB Driver Version: 11.2.0.3.0 | |
| JVM Details | |
| JVM bitmode: 32-bit | |
| Used Java Version:1.8.0_77 | |
| Operating System Architecture:x86 | |
| Statistics | |
| own MDS: | n.a. |
| own Modules: | n.a. |
| accepted MDS: | n.a. |

Figure 26: Help - About



4 Toolbar

Depending on your licensed version several action buttons are available. As a standard following buttons are provided (see Figure 27):

- Search MDS/module
- Create MDS/module
- Analysis
- Product model
- Refresh iPCA internal application cache



Figure 27: Toolbar

4.1 Toolbar: Search MDS/module

To start the generally search window of SAM-M click on the ^{AA} button. The search window provides a powerful tool to administrate your data, to manage the product related information and control the whole process for product legal conformity. For detail information see chapter 5.

4.2 Toolbar: Create MDS/module

To create a MDS click on the button in the toolbar. After that a dialogue window with the request "Please make your choice:" will open. This dialogue window can also be opened by clicking on "Data" then "New" in the menu bar. Material Data Sheets (MDS) for article, mixtures, or substances can be created here. For more information see chapter 5.3.3 (for articles), 5.4.3 (for mixtures) or 5.6.3 (for substances).

4.3 Toolbar: Analysis

Under "analysis" a powerful wizard will be provided to manage and plan your product conformity investigations. Here is possible to define cyclic testing procedures which will start automatically depending on set parameters. The user will be informed automatically about the results of the cyclic CSI checks by e-mail.

To start the parameter definition, please click the "analysis" icon 📗 . Then a new dialog window opens (wizard). In the register tab the needed checking parameter can be defined. For more information see chapter 3.3.2 or the separate User Manual "CSI User Manual".



4.4 Toolbar: Product model

To open a "Product model" click on the end button. The search functionalities in the search window can also be used (see chapter 5.2). The "Product model" includes information on product model level. For more information see chapter 5.2.

4.5 Toolbar: Refresh iPCA internal application cache

To refresh the iPCA internal application cache click on the *button*. Please use the refresh button to make visible differet changes in the data made on several product stages (i.g. to activate changes of a MDS in a BOM view where the article will be used).



5 Search Widnow

There are different sheet tabs available to navigate using the "search" window: VP, Product model, Article, Mixture, Article/Mixture, Basic substances, SEP and REACH request.

Click on the "binoculars" icon to open the "search" window (See Figure 28).

| O il | Poin | t Compliance Ag | ent | | | - | | | | | | | | |
|-------------|---|-----------------|----------|-----------|----------------|--------|------------------|--------|----|--|--|--|--|--|
| File | File Edit Data Options Extras Window Help | | | | | | | | | | | | | |
| 86 | 66 D 🗐 🖉 🥙 | | | | | | | | | | | | | |
| 88 : | 🕷 Search 📃 🔲 🔀 | | | | | | | | | | | | | |
| V | /P | Product model | Article | Mixture | Article / Mixt | ure | Basic substances | SEP | R | | | | | |
| • | Na | ame: | | | SOP | | | | | | | | | |
| | Nu | umber: | | | Import da | te: | | | | | | | | |
| | Mo | odel year: | | | | | Show ina | ctive? | | | | | | |
| | Con | npliance Checks | | | | | | | | | | | | |
| - | | Searc | ch Re | set | Info: 15 | 9 rows | found! | | | | | | | |
| - | × | Name | Num | ber | Model year | SOP | Import date | Active | De | | | | | |
| | 1 | Demo Stecker I | Rot Demo | 12345 | | | 2014/07/31 | Active | | | | | | |
| | 2 | Demo plug red | Leoni | 1 | | | 2015/02/04 | Active | E | | | | | |
| | 3 | TSYS-TSYS TES | T 00000 | 00000000. | | | 2015/02/17 | Active | | | | | | |
| | 4 | TOM BLEY-Hea | ad 00000 | 00001000. | | | 2015/02/17 | Active | | | | | | |
| | 5 | TOM RIEV-Acc | em00000 | 00002000 | | | 2015/02/17 | Active | | | | | | |
| | • | | 2003 | | | | | | P | | | | | |
| | | | Loa | d Ana | alysis MDS | list [| Deactivate | | | | | | | |

Figure 28: Search window of iPCA

5.1 VPM (Virtual Product Model)

The overview and several advanced search and management functionalities for "Virtual Product Model" will be provided in the "VP-tab". For more information for this function please see the separate User Manual "VPM-Usermanual".



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| 🕷 Search | | | | | | - 0 💌 |
|---|--|----------------------------------|---|---------------|--|-----------------|
| VP Product model | Article Mixture | Article / Mixture | Basic substances | SEP REAC | CH request | |
| VP Name: Type: Assigned Project: Mode: | All 🔹 | Source: All | Access: A | | Compliance D Create Date: Creator: d: | ate: I |
| Data VP Name Type | Search Re Project name Mode Create VP Ec | it VP Copy VP ts List DS List | eation Creator La Create) Delete V Add Rul) Reports | st change Las | t change user | [Id]ID]C(▶ |

Figure 29: VP-Tab

5.2 Product Model

BOM tree structure:

5.2.1 Product model - Definition

The product model represents an overview of a product structure (e.g. BOM), their components and parts (see Figure 30). The overview includes the general product information and the legal compliance.

The product model can be a product (BOM), an article (see chapter 5.3) or a sub-article and can be composed of several mixtures (Chapter 5.4), materials, semi-components or substances (Chapter 5.6).



Figure 30: Product model tree

5.2.2 Product model – Search

The "Product model" tab includes information on product model level. To search for specific product models, use the filter options available (Figure 31).

The SAM-M search panels are divided into multiple function areas (see Figure 31):

• Standard search criteria (red area)



- Extended search criteria (blue area)
- Search result area (yellow area)

| 88 5 | Search | | | | | |
|------|---|-------------------------------|-------------------|------------------------------------|----------------------------|---------------|
| ٧ | P Product model A | article Mixture | Article / Mixture | Basic substances | SEP F | REACH request |
| - | Name: Number: Model year: | | SOP Import d | ate: | ow inactiv | e? |
| | RoHS (2011/65/EU) Search | n Reset | SVH | C each level (16) 3 rows found! | | |
| | Name Demo Stecker Rot Demo plug red | Number Demo12345 Leoni1 | Model year 54 | 2014/07/31 2015/02/04 | Active Active Active | Description |
| | | Load | Analysis MDS | list Deactivate | | |

Figure 31: Product model filter options

The columns in the Product Model tab can be configured (Menu \rightarrow Options \rightarrow Checks \rightarrow Check configurations \rightarrow SEP Compliance Checks) as shown in the Figure 32 where it was activated additional regulations (rule groups) to show their legal status in the Product Model table.

| O Check configurations | | | |
|------------------------|----------------|------------|-----------------|
| Name: MODULE_SCM | Description: S | CM/USC | Inbox Check |
| Recommendation Checks | General Checks | CSI Ch | ecks |
| Description | | Precheck | No check at all |
| Released rule groups | | | |
| RoHS (2011/65/EU) (12) | | \bigcirc | ۲ |
| SVHC each level (16) | | \bigcirc | ۲ |
| < Previous Sa | ave Reset | Parame | te |

Figure 32: Product Model - Configuration options in the tab

5.2.2.1 Product model - Standard search criteria area

• Name: Name of the product model as imported



- Number: Number of the product model as imported
- Model year:
- SOP: Start of Production date. Date for which it is planned to put this product model onto the market
- Import date: Date on which the product model has been imported
- Show inactive?: Mark this box if also product models which are set as "inactive" should be shown in your search results.

5.2.2.2 Product model - Advanced search criteria area

The advanced filter options in Product model tab are shown in the Figure 33:

| 1 | 🖲 Sea | irch | | x |
|---|-------|---|--|---|
| | Pro | duct model Article | Mixture Article / Mixture Basic substances SEP REACH request | |
| | • | Name: Number: Model year: | SOP IIII | |
| | B | RoHS (2011/65/EU) REACH Annex XVII (7) SVHC each level (14) | REACH Annex XIV (8) SVHC complete par | |
| | • | 3 | Search Reset | |

Figure 33: Product Model - Advanced filter options

Depending on the rulegroups activated in iPCA, when the second "+" symbol (besides "Compliance Checks") is clicked (1), the available rulegroups are displayed together with a drop down menu where further filter options can be chosen (2). Click on "Search" (3) when all filter options have been set. If no filter is set all available product models are displayed (Figure 34).



| IPCA S | AM-M – User Manual | R13 |
|--------|--------------------|-----|
| | | |

| 88 | Sea | rch | | | | | | | | |
|----|-------------|-------------------------------|-------------|---------|-----------|-------------|----------|-----------------|------------|---------------|
| | VP | Product model | Article N | lixture | Article , | / Mixtu | re Ba | asic substances | SEP | REACH request |
| 6 | N N M | ame: umber: lodel year: | | | | SOP Impo | rt date: | She | ow inactiv | e? |
| E | Re | oHS (2011/65/EU) | | | • | S | VHC ea | rch level (16) | | • |
| E | | Searc | h Res | set | | Info: | 163 ro | ws found! | | |
| E | × | Name | Number | 8 | Model | year | SOP | Import date | Active | Descriptior |
| | 1 | Demo Stecker Rot | Demo12 | 345 | | | | 2014/07/31 | Active | * |
| | 2 | Demo plug red | Leoni1 | | | | | 2015/02/04 | Active | E |
| | 3 | TSYS-TSYS TEST | 0000000 | 0000000 | | | | 2015/02/17 | Active | |
| | 4 | TOM_BLEY-Head- | 0000000 | 0010000 | | - | | 2015/02/17 | Active | T |
| | • | | III | | | 2 | | | | • |
| 6 | | | Lo | ad | Analysis | M | DS list | Deactivate | | |

Figure 34: Product Model - Search results

5.2.2.3 Product model - Search results area

The possible functions (See Figure 35) for the displayed product models are:

- Load: Opens the selected/marked product model. Shows all available information to the marked product model. A Product model can be selected with the mouse and clicking the icon "Load".
- Analysis
- Product model MDS list: shows an overview of the general reporting and compliance status. This tab has the following options:
- Load: allows to load the product
- Check uncheck: allows to check all unchecked entries including CSI check.
- Reporting Status: shows an overview of the reporting status
- Compliance: shows an overview of the reporting status



| | 5 list - Delli0125457 De | The stecker h | | | | |
|------|--------------------------|---------------|--------------|--------------------|---------------------|-------------|
| - N | lodel name: | Demo S | Stecker Rot | SOP: | | |
| Ν | lodel number: | Demo1 | 2345 | Model year: | | |
| N | lame: | | | Number: | | |
| II | MDS Id: | | | IMDS Node-Id: | | |
| S | tate of Reporting: | | • | Suppl./Org.units: | | 86 |
| Co | mpliance Checks | - | | 1 0 | | |
| | Search | Reset | I | nfo: 5 rows found! | | |
| Data | 1 | | | | | |
| × | Name | Number | IMDS Node ID | IMDS ID / Version | Supplier | Supplier Co |
| 1 | N/A: Oberteil Gehäus | Demo.2.1001 | | | ABB Holding (-6118. | 3) |
| 2 | N/A: Oberteil Schrau | Demo.2.1002 | | | ABB Holding (-6118) | 3) |
| 3 | N/A: Oberteil Dichtung | Demo.2.1003 | | | ABB Holding (-6118 | 3) |
| _4 | N/A: Mittelteil Gehäu | Demo.2.2001 | | | ABB Holding (-6118 | 3) |
| _5_ | N/A: Demo Unterteil | Demo.1.3000 | | | ABB Holding (-6118 | 3) |
| | | | | | | |
| • | III | | | | | 4 |
| | Loa | d Check | uncheck) 🌏 R | eporting st] 🛛 🍳 | Compliance | |

Figure 35: Product model – MDS list options

Product model – Deactivation: Deactivated product model cannot be edited any more by users.
 Furthermore deactivated articles are hidden throughout the system and e.g. cannot be found with the standard search panels. By marking the box "Show inactive?" these articles can be displayed.

5.2.2.4 Product model – Status messages

- ? Not set: The compliance status has not been set for this object yet
- **Grey**: The object in not relevant to the compliance rule
- **Green**: This object is in compliance with the rule
- Yellow: This object does not meet all legal requirements. Further activities need to be initiated to meet the requirements.
- Red: This object does not meet all legal requirements. No further activities have been taken as of yet.

5.2.3 Product model – Creation

As mentioned before, a product model can be a product, article (5.3), sub-article or mixture (5.4). See the respective subchapters to learn how to create each of this modules.

5.2.4 Product model – Editing

5.2.4.1 Detail area

After "load" a Product model, a new window opens, showing the details available for the desired product. This window contains the following tabs: IHS, Compliance, Characterization, Waste disposal, Documentation and History.



5.2.4.1.1 In House Solution (IHS)

"In House Solution" (HIS) tab includes information related to the already uploaded existing product information (See Figure 36). It consists of several information fields that can be viewed and also edited.

| • plug | | đ 🗙 | | | | | | | | | |
|---|--|-----|--|--|--|--|--|--|--|--|--|
| 🔼 🔻 🛦 🕲 🖯 🐰 🖉 🍕 - 😘 🖓 - | 🐵 🔿 🖆 🖀 🔎 🦻 🍋 😹 😻 | | | | | | | | | | |
| plug IHS Compliance Ch | nbug IHS Compliance Characterisation Waste disposal Documentation History Product Volumes | | | | | | | | | | |
| (1 EA) (10 E iPCA ID: 1985600 (0.01) | | | | | | | | | | | |
| 1 Supplier: | 1 Supplie: | | | | | | | | | | |
| 2 Primary Name: | Stecker Partial declaration: | | | | | | | | | | |
| 3 Names: | → Process flag: □ 1 | | | | | | | | | | |
| | Description Language - Notification: 12 | | | | | | | | | | |
| | 1 plug 🔣 en Release Date: 🦯 10 - In progress 🚺 | | | | | | | | | | |
| | 2 Stecker e IHS Release comment: 13 | | | | | | | | | | |
| | | | | | | | | | | | |
| | ۲ (الله الله) (ال | | | | | | | | | | |
| Article no.: | 000000000000225 IHS no.: 000000000000225 Valid until: 15 | | | | | | | | | | |
| 5 Standard: | | | | | | | | | | | |
| 6 Measured Weight | 28 g 💌 | | | | | | | | | | |
| 7 Tolerance (+/-) | % | | | | | | | | | | |
| Calculated Weight | 0 9 | | | | | | | | | | |
| 9 Deviation | -100 % | | | | | | | | | | |
| | | | | | | | | | | | |

Figure 36: Product Model - IHS Information

- At the top of the IHS information panel the node type (article in this case) and the current version number are visible.
- Coloured fields are required fields, they must be filled in order to proceed with all calculations available.
- Supplier: To select the supplier click the "binoculars" icon. The search window for the supplier selection search opens. The supplier with the appropriate address shall be selected and accepted. With the "scissors" icon the entry of the supplier can be removed.
- (1) Primary name: Name used internally for the article. As you edit this field other functions are deactivated. To activate them please set the cursor in another place of the window (by clicking on another field or tip the tab key e.g. click or remove the cursor to the next field "Names").
- (2) Names (in a variety of languages): Additionally definition of further names in different languages is available (the standard languages are: English, German, French and Spanish).
- (3) Article no., IHS no.: According to the mixture, the company standards/internal number can be maintained.
- (4) Standard: reference to apliad standards and norms.
- (5) Measured weight: it is the measured weight of the corresponding MDS.



- (6) Tolerance (+/-): AN error will be created if the difference between the masterdata's weight and supplier's part weight exceeds a configurable tolerance.
- (7) Calculated Weight: is the sum of the weight values (measured weight for components, weoght for semicomponents and materials) or the component's direct children of the next level.
- (8) Deviation: difference between the calculated weight of used substances and measured weight of the article
- (9) Partial-declaration: If the option is selected, the system does not require, for the marked article, a full material declaration. That means, in the product tree "substance gaps" will be accepted. This is currently a common practice in the supply chain to deliver partial material declaration (according to low requirements like EU-RoHS-directive or REACH-regulation).
- Process flag: By checking this field this article is marked as a "process article" only (not included in the end product). This is especially relevant for chemical mixtures. Note for mixtures: only process mixtures can have other mixtures as children.
- (11) Notification: Marking of the notification of the part. For more information for this function please see the separate "REACH-User Manual".
- (12) Release Date: date of release (approval) of the article (e.g. release for production).
- (13) IHS Release comment: User comments according to the release. For more information see chapter 5.3.3.3.1, 5.3.5 and 5.4.3.3.1.
- (14) Valid until: date of validity (regarding to compliance status of the article)
- (15) A date can be chosen which reflects the date until a part is likely to be used.

Classification

Materials are assigned to a classification. The material classification can be found underneath the HIS tab (See Figure 36). By clicking the "+" icon a new area will open where several classifications (HIS, ISO) can be selected and added (for the available options) for each article. With the "-" icon the added classification can be removed.

| - c | lassification | | | | | | |
|-----|----------------|------|------|----------|--------------------|---------|---|
| | Classification | Name | Туре | Language | ISO Classification | Group 🔫 | + |
| | | | | | | | - |
| | | | | | | | |
| | | | | | | | |
| | 1 | | | | | | |
| | • | | | | | | · |

Figure 37: Product Model - Classification in IHS tab



There are several filter options to search for the right classification. To choose one line click first (1) and click on "Apply" (2) as shown in Figure 38. The window will close automatically after a classification is chosen. It may also be closed by clicking "Cancel".

| O Class | ifications | | | | | × |
|---------|--|--|---|---------|--------------------|----------------------|
| | English French German Portuguese Spanish | ▲ Group: Type: Search for: | ▼ ▼ Search Reset | Info: : | 141 rows found! | show deleted records |
| % | Language | Classification | Name | Туре | ISO Classification | Group |
| 1 | 1 🔣 en | +1D | Hot rolled, heat treated, pickled | IHS | | Thermal treatmer |
| 2 | 🔠 en | +1D/1G1 | Hot rolled, heat treated, pickled, only one sur | . IHS | | Thermal treatmer |
| 3 | en 🔠 | +1D/1G2 | Hot rolled, heat treated, pickled, two surfaces | . IHS | | Thermal treatmer |
| 4 | 🔠 en | +1E | Hot rolled, heat treated, mechanically descaled | IHS | | Thermal treatmer |
| 5 | 🔠 en | +1X | Hot formed, heat treated, rough machined | IHS | | Thermal treatmer 👻 |
| | | | | | | • |
| | | | | | 2 Apply | Cancel |

Figure 38: Product Model - Add a classification to an Article

Usage information:

Description

The usage information displays details about the chosen product model (Figure 39).

| | Usage informatio | n | | |
|---|------------------|------------------------|-------------------|--|
| 1 | Creator: | IPCA | 3 Last editor: | |
| 2 | Creation date: | 2014/05/05 12:25:26 PM | 4 Last edit date: | |

Figure 39: Product Model - Usage information

- (1) Creator: The user who has created this Product model. If the Product model was transferred from a PDM system, the term "IPCA" will be inserted by default.
- (2) Creation date: The date when this Product model was initially created
- (3) Last editor: The user who has edited this Product model most recently
- (4) Last edit date: The date at which the most recent update by the user displayed above took place

5.2.4.1.2 Compliance

The information regarding the use cases of the product can be inserted manually within the Compliance tab (See Figure 40).



- Further identified uses: For some regulations it is essential to know the use case of the product model. Sometimes it makes a difference, whether a part is used or can be used within a medical device, in military devices or any other application fields. Therefore these scenarios can be inserted here by using the icons "+"(to add a use case) or "-"(to delete a use case).
- Uses advised against: Similar to the point above, it might also be of interest for which use case it not advised to use that product model.
- Exemptions/Applications: Depending on the regulation, there might be substance groups that are allowed for specific usages, but not for others. These exemptions can be entered here manually.



Figure 40: Product Model - Compliance tab, for compliance specific information

5.2.4.1.3 Characterization

The tab describes the physic-chemical characterization of the product. The Characterization tab is most useful for chemical mixtures and is split into two further tabs: "General" and "Other properties".

General:

General properties can be manually entered by choosing the corresponding properties from the drop down lists shown in Figure 41. Colour (1), Odour (2), Aggregates state (3), the chemical formula (4) and further characterization properties can be inserted optionally. As the Characterization field is a free text field, the language can be switched and the text might be entered in several languages.



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| AIR DEFLECTOR | | | | | | | | | | |
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| AIR DEFLECTOR | | IHS Compliance | Characterisation | Waste disposal | Documentation | History | Product Volumes | | | ľ |
| N/A: AIR DEFLECTOR | R (1 E | General Other pr | operties | | | | | | | |
| | 6 | Colour: | | • | | | | | | |
| | | Odour: | | • | | | | | | |
| | | Aggregate state: | | • | | | | | | |
| | | Formula: | | | | | | | | |
| | | Characterization | | | | | | En elia | | |
| | 4 | Characterisation: | | | | | | | ····· | |
| | | | | | | | | | | |

Figure 41: Product Model - Characterization - General tab

Other properties:

Properties can be added in more detail by opening the "Other properties" tab, within the "Characterization" tab of a Product Model, see 5.2. All inserted values will be displayed in the overview table (1).

- (1) Group
- (2) Property
- (3) Standard
- (4) Test conditions
- (5) Minimum-, Maximum-, (Average) value, Tolerance, Unit: Insert test results here according to the titles.

Click onto one of the nods in the product tree and choose whether you would like to: create a New set of properties, Edit existing ones, Delete it, save your Changes or Cancel the process (your changes will get lost).

5.2.4.1.4 Waste disposal

Any useful information regarding the disposal of a Product model or its substances can be centrally organized within the iPCA. Add or remove information by using the icons "+" and "-" located in the upper right corner of the tab. An example of the possible disposal types is shown in the Figure 42.



| Demo Ste IHS Compliance Characterisation Waste disposal Documentation History newArt N/A: N/A: Image: State of the st | mo Stecker Rot | <i>ø</i> 😵 • • ø © • | E E P \$ 🔇 d (k 🔍 🖉 | |
|--|---|-----------------------------|------------------------------------|---|
| newArt Demo (N/A: N/A: Demo (N/A: Demo (N/A: Demo (Group: Search for: Search Info: 970 rows found! Data | mo Ste IHS Co | ompliance Characterisati | ion Waste disposal Documentati | ion History |
| N/A: D Group: Group: Search for: Data Data | newArt Demo (N/A: N/A: N/A: Demo (O | | | + - X |
| Data | N/A: D | ■ English ■ German | Group: Search for: | show deleted record 970 rows found! |
| | Dat | a | | |
| Code Description Group Language | 8 | Code Description | Group | Language |
| 2 01 01 00 00 WASTES RESOLUTING FROM EXPL Editopean Waste Cat a en | + 2 | 01 01 00 00 wastes from min | neral excavation European Waste C | Cat 📾 en 🗐 |
| 3 01 01 01 wastes from mineral metalliferouEuropean Waste Cat 🖬 en | 3 | 01 01 01 wastes from min | neral metalliferouEuropean Waste C | Cat 🖮 en |
| 4_01 01 02 wastes from mineral non-metalli European Waste Cat 📠 en | 4 | 01 01 02 | neral non-metalli European Waste C | Cat 📾 en |
| 5 01 03 00 wastes from physical and chemic European Waste Cat 🔤 en | | JOI 01 02 Wastes from min | | ALC AND A LOCAL |

Figure 42: Product Model - Waste disposal tab including types of wastes per Group

5.2.4.1.5 Documentation

In case a supplier has used iPoint "Supplier Entry Portal" (SEP) to upload his compliance information and attached additional documents, they are shown in the upper section called "Documents", see Figure 43. Below, in section "emails", all emails that have been sent to the supplier of this product model automatically by the system, are listed. The Figure 44 shows the Detail view of the Product Model Documentation tab (by clicking on "new").

| AIR DEFLECTOR | | |
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| AIR DEFLECTOR | IHS Compliance Characterisation Waste disposal Documentation History Product Volumes | |
| N/A: AIR DEFLECTOR (1 E | locuments | |
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| | | |
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| | New Edit Delete Show Export | |
| | | |
| | mails | |
| | Sender Receivers Subject Message text Mail sent | Company name |
| | | |
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| | | |
| | New Show | |
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| | New Show | |

Figure 43: Product Model - Documentation available



| iPCA | SAM-M – User Manua | R13 |
|------------------|--------------------------------------|--------------------------------------|
| | | |
| Demo Stecker Rot | | |
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| Demo IHS Comp | liance Characterisation Wast | e disposal Documentation Hist |
| nev Document | s | |
| Ber Der Deser | intion Fractout field / File Name | UDI Versien na Versien dete Desum |
| N/A Desci | Iption Free text field / File Name / | ORL/Version no./Version date/Docum |
| O Documents - de | tail view | X |
| Usage scope: | | 8. % |
| Version no.: | Ve | rsion date: |
| Description: | | |
| Document format | Lar | nguage: |
| Document type: | Not specified | |
| | Save | ncel |

Figure 44: Product Model - Detail view of the documentation tab

5.2.4.1.6 History

Use the "History" tab if you want to find out about historic email conversation between iPCA and the supplier. There are several filter options available (see Figure 45), to make it easier finding the email you are looking for.

- (1) Name of Responder: This field can be filled in case the responders name is known. This can be a material or compliance specialist at your suppliers company.
- (2) Request state: Choose a state from the dropdown list in which the request currently is in.
- (3) Request date: Choose "from" and "to" dates by clicking on the calendar icons to filter for a specific time frame within the request has been sent.
- (4) Release date: Choose "from" and "to" dates by clicking on the calendar icons to filter for a specific time frame within the request has been released by the supplier.
- (5) Search: Click "Search" when you have finished entering filter criteria or
- (6) Reset: Click "Reset" to delete all filter criteria





Figure 45: Product Model - Email history

5.2.5 Product model – Working copy – New Version

A working copy of a product model will always be created if the existing full version (released version) is changed.

This can be done by creating a new version:

- Select the top of the tree of the original product model
- Click on "new version" below the search result list
- Confirm the creation of the working copy: an editable copy of the product model will be opened having a new version 0.02. Notice that the Product model version (in parenthesis) have been changed

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| B | D D of | Cut | 2512 (0.02) | ^ |
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| | | Expand tree | | . |
| • | <u> </u> | Collapse tree | | 1 |
| | | Search | | |
| | 6 | Print Report MSDS | | |

Figure 46: Product model – Working copy



5.2.6 Product model – Deactivation/Activation

With the icon "Deactivate" (See Figure 34) a product model can be marked as deactivated. This means that a deactivated article cannot be edited any more by users. Furthermore the deactivated product models are hidden throughout the system and e.g. cannot be found with the standard search panels. Therefore they cannot be used any more by regular users.

Users which have the corresponding permissions can search for deactivated articles by selecting "deactivated" in the "Status" Combo Box. They also have the possibility to "re-activate" deactivated articles again after they search for deactivated articles.

5.3 Article

5.3.1 Article – Definition

The term "Article" used here refers to the REACH- Regulation. REACH defines an article as an object which during production is given a special shape, surface or design that determines its function to a greater degree than its chemical composition. Therefore completed products (e.g. a computer or a vehicle), components (e.g. a power adapter or a vehicle motor) and single devices (e.g. a capacitor or a fixing bolt) are identified as articles.

After Articles have been imported from your ERP systems or entered manually, they will be visible in the "Article" of the "Search" window (Figure 47).

5.3.2 Article – Search

Articles can be searched using different criteria, as name, number, release status etc. Using the expanded search criteria, you can activate additional search criteria, like usage scope, classification, application, etc. as shown in Figure 47.

Click on "Search" to see the list of Articles that fit your filter criteria or on "Reset" do delete all filter criteria that have been set.

The list of all articles for which a supplier has inserted information, or information has been gathered from other ERP systems (depending on the iPCA version) is displayed below the filter tab. Click onto one article and choose whether to open or delete the article, or to create a new Version.

The SAM-M search panels for Articles are divided into multiple function areas (see Figure 47):

- Standard search criteria (red area)
- Extended search criteria (blue area)
- Search result area (yellow area)



| s Se | arch | | | | | | | | | | |
|------|------------------|-------------|-----------|-------------|--------|----------------|--------|---------|----------|----------|------|
| VP | Product model | Article | Mixture | Article / M | ixture | Basic subst | ances | SEP | REACH r | equest | |
| - | Name/Synonyms: | | | | IHS n | o.: | | | | | |
| , | Article no.: | | | | IHS R | elease status: | | | | | • |
| | | Current | /ersion | | Statu | s: | Active | 2 |] •] | | |
| | | | | | Valid | to: | | | - | | |
| 8 | Supplier: | | | | MA S | ite of usage: | | | | 8 | |
| 1 | Usage Scope: | | | | A | pplications: | | | | + | |
| | Classification: | | | | + | | | | | | |
| | | | | | - | | | | | | |
| | | | | | R | EACH state: | | | | • | |
| J | REACH relevance: | | | • | | | | | | | |
| | S | earch | Reset | | Info | : 562 rows fou | ind! | | | | |
| Dat | ta | | | | | | | | | | |
| Na | me / | Article no. | IHS | S no. Vers | ion 🛛 | IHS Rel. | Rele | ease Da | te Relea | ase comr | nent |
| VP | TEST1 STOTZ 0 | 000000000 | 000 0000 | 00000 0.01 | | 🖉 0 - In Progi | · | | | | |
| VP | TEST1 STOTZ 0 | 000000000 | 0000 000 | 00000 0.01 | 1 | 0 - In Progr | · | | | | = |
| VP | TESTI STOTZ 0 | 000000000 | 00000 000 | 00000 0.01 | 4 | 0 - In Progr | | | | | * |
| • | | | III | l. | | | | | | | • |
| | | | Load | Delete | Ne | WVers IPC | 1752 | | | | |

Figure 47: Articles – Search panels

5.3.2.1 Article - Standard search criteria area

- Name/Synonyms: Name of the searched article. Enter the Article name/description as imported to search for an Article by its name.
- Article no.: Article-search by using an In-house number. Enter the Article number as imported to search for an Article by its Article number.
- IHS no.: Enter the In house used Article number to search for an Article by its IHS number.
- IHS Release status: Article-search by using the approval status. Choose one of the statuses shown in the dropdown list to search for an Article by its in-house release status (See Figure 48).



Figure 48: Article - Possible IHS Status

• Status: Chose one of the states from the dropdown list, depending on whether you would like to search for "active" or "deleted" articles.



• Valid to: Enter a date by using the little calendar icons besides the "from" and "to" fields. This date shows until when the current compliance state is valid. After this date, a regulation might be changed or an included substance has reached its sunset date.

5.3.2.2 Article - Extended search criteria area

By clicking the "+" icon, further filter options will open (Figure 49).

| - | Supplier: | 0 | Site of usage | je: ち 😹 |
|---|-----------------|------|---------------|---------|
| | Usage Scope: | 2 | Applications | IS: 6 + |
| | Classification: | 3 | + | |
| | | - | - | |
| | | | REACH state | e: 🕜 |
| | REACH relevance | e: 🚺 | ▼ | - |
| 8 | 1 | | Search Reset | |



- Supplier: Search for a supplier by using the "binoculars" icon besides the text field. A new search
 panel will open where further details on the supplier are requested in order to find him. This
 function enables the user to execute an article-search for the affiliation to an appropriate supplier
 and/or (its) legal units. The name of the supplier can be entered directly into the input field or can
 be found in the master data. To start the master data search press the "binoculars" icon. A new
 window "Selection Companies/Suppliers" will be opened. The searched name will be supplemented
 automatically with "*" at the end.
- The activation of the checkbox "Only Companies" restricts the search results only to companies (without legal units). The input field "Legal units" will be hidden in this case. In addition the article search can be conducted to find the responsible contact persons. The column "Contact person" will be available in the search results mask in that case.
- Usage Scope: Search for a usage scope by using the "binoculars" icon besides the text field. A new search panel will open where further details on the companies, legal units and contacts are requested in order to find it.
- Classification: By using this search criterion, the user is able to search for articles by a defined classification. Executing the icon "+" will open a separate search window, where the defined/searched classification/type can be searched for and assumed. Add or Delete classifications (fluid, glass, elastomer...) by using the "+" and "." icons. A new search panel will open, see Figure 38.
- REACH relevance: Search for the REACH Relevance of the articles. It is possible to search for articles
 that include substances or mixtures that are handled by the ECHA-candidate list / Annex XIV /
 Annex XVII of the REACH-regulation. Further REACH-requirements such as missing substance
 registration- or authorization-number will be considered too. The following search criteria are
 available: "Not set", "Not REACH-relevant" and "REACH relevant". Choose from the dropdown list
 whether Articles which are set as relevant or not relevant for REACH.



- Site of usage: This search criterion gives the possibility to find articles by their place of usage (e.g. company- or production site). Search for a site of usage by using the "binoculars" icon besides the text field. A new search panel will open where the organization unit of interest can be selected. Only available if several sites/organization units are licensed for the usage of iPCA.
- Applications: Add or Delete fields of applications you want to look for by using the "+" and "-" icons. A list of possible application fields will open.
- REACH state: Select the REACH state you want to get displayed in your search results from the dropdown menu. Further REACH-indicators can be set, if they are required as: not set, grey, yellow, green and red.

5.3.2.3 Article - Search results area

The possible actions for the displayed article are:

- Load: Opens the selected/marked article.
- Delete: Deleting an article leads to a total elimination of this data entry. This article cannot be found in the Article tab any longer. Click onto the article that should be deleted, then click on delete and on "Yes" if you are sure that you want to irreversibly delete this article.
- The Request and its status stays visible in the "SEP" tab of the "Search" window.
- New Version: Deactivates the selected/marked article
- Article IPC 1752: Exports the relevant material information of the selected article into a standardized file (standardized here is in accordance to IPC 1752A-V.2).

5.3.3 Article - Creation

To create a new Article select "File" in the menu bar. After that a dialogue window with the request "please make your choice" will open. Then click on the "Article" icon. Predefining of Article no. and name will be recommended. The dialog window can also be opened by clicking the "document" icon (See Figure 50) in the menu bar.

In the entry filed "Article no. / Mixture no." the corresponding part number can be entered in advance. By clicking the icon "Article" the creation process will be started (see Figure 50). This opens the input screen in which further information can be entered and edited (see chapter 5.3.4).

Note:

The type and amount of the possible entries in this dialogue window may vary depending on the licenseversion, the included modules and the permission of the user that you currently have installed.



| Create new | X |
|---|-------------------------|
| P | lease make your choice: |
| Article / Mixture: Article no. / Material no. Primary Name: | |
| Create a new substance: Substance no.: | Substance |
| CAS No.: Einecs/Elincs EU-Index: | |
| | Cancel |

Figure 50: Article - Creation

After creating an article, the article-specific mask will open (see Figure 51). The relevant data regarding the (sub-) articles, mixtures, substances, their weight and attributes will be entered here. This can be done manually or automatically by using data-imports. The Article mask shows the following areas:

- Action (red area)
- Navigation, show as the tree view (yellow area)
- Detail area (blue area) with sub-tabs: IHS area, Characterization, Waste disposal, Documentation and History



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Figure 51: Article – Specific Input Mask

5.3.3.1 Article - Action Area

This area offers active symbols that provide a range of functions for managing articles. The individual symbols are dependent upon an activated or deactivated context. Regarding the current context only active icons are able to be used.

The following functions are available:

Add articles:

By clicking on this icon a new window opens – here you have the option to choose either an existing article (as a node in the tree), to create a new one, or to define a new missing position (see Figure 52).

• New Node: exists only within that one tree. An (sub) article will be added as a simple node in the product tree on the marked position.



A simple node is used only as a logical grouping and exists only within that one tree. A simple node cannot be found on the data search or be used in other trees.

- Existing node: a search window opens, where existing articles can be search, select and apply in the product tree.
- Missing position: this function adds simple node as a placeholder for an article which still has to be filed with further data. By deselecting the marking as missing position this node can be converted to a simple node – this is an irreversible conversion.
- Cancel, this process can be reset without changes.

The child node will be added as the next node on the structure tree (below the current marked position).

All nodes in the product tree are only referenced logically. Hence editing of nodes directly in the product tree is not possible. Only quantity, weight or percentage by weight can be edited directly in the product tree. To edit further node data you have to double click the node to open it in a separate edit panel.

Furthermore the following is not possible:

- To add the same article twice on the same level,
- To add an article, that already exists in the override tree level.

In both cases the following error message will appear: "Article may be added twice under the same parent!"

| What would you like to insert? | 8 |
|--|---|
| What would you like to insert? | |
| New Node existing node Missing position Cancel | |

Figure 52: Article - Dialog window: creating of new nodes

Add mixtures: By clicking on this icon a new window opens – here you have the option to choose either for an existing mixture (as a node in the tree), create a new one, or to define a new missing position. By clicking "Cancel", the process can be reset without changes (same actions and processes as described above under "Add articles")

Add substances: By choosing this icon a new window opens where you can search for substances. After selecting a substance the icon "Apply" has to be clicked to add the substance into the product tree. The new substance will be added as a new child (node) on the tree structure (below the current marked position). The add actions are similar to "Add articles" (as described above).

Add substances as a negative declaration: By choosing this icon a new window opens where you can search for substances. After selecting a substance the icon "Apply" has to be clicked to add the



substance into the product tree. The substances will be defined as not existing substances in the tree (negative declaration). Also the negative declared substances are added as a new child (node) on the tree structure (below the current marked position). The add actions are similar to "Add articles" (as described above).

Setting the REACH relevance: With this drop down icon the reach relevance can be set.

Setting the IHS Release Status: This icon opens a dialog box (see Figure 53) in which the release status of the article can be set.

| HS Release status: 🛛 🖊 |) - In Progress 💌 | |
|------------------------------|-------------------|--|
| Release Date: | | |
| Calculated valid until date: | | |
| Remark: | | |
| | | |
| | | |
| | | |
| | | |

Figure 53: Article - HIS Status

5.3.3.2 Article - Navigation tree

The article-navigation area is displayed in a tree view. The following general information is displayed corresponding to the respective node in the tree:

- Name of the articles and sub nodes (main node)
- Amount of the articles (for articles only)
- Declaration of weight (for articles and mixtures/substances under an article)
- Percentage by weight (for substances under a mixture)
- Detailed, node-specific information will be displayed in the IHS-area by clicking/selecting a node.

Detailed, node-specific information will be displayed in the IHS-area by clicking/selecting a node.

The tree structure will be opened by clicking the "+"symbol.

The tree structure will be closed by clicking the "-" symbol.

Note:

The area that contains the currently selected node cannot be hidden. To close (hide) the node on the higher tree level, they need to first be selected.



By double-clicking on a node in the tree (article, mixture or substance) the corresponding part will be open in a separate window. In this window, the further editing of this (sub-) node is possible. The procedure here is analogous to the above-described processing of articles.

5.3.3.3 Article – Detail Area

Each article can contain many details. The detail area is structure into the following sub-tabs: In-House-System-Information (HIS), Compliance, Characterization, Waste disposal, Documentation, History and Usage scope.

| demo-article_01 | | | | _ | | | | - 0 | × |
|--|---|-------------------------------------|---------------|---|---------|-------------|--------------|-----|---|
| ▼▲ ⑧ 日 ※ Ø | 🖉 - 🛛 🚳 🖙 🚘 | 🕋 🔎 🖗 🌖 |) 🗟 🌘 🕘 | 2 | | | | | |
| demo-article_01 | IHS Compliance Char | acterisation Wa | aste disposal | Documentation | History | Usage Scope | | | |
| Test_mixture_01 (2 g) Copper, Powder (30 %) Tin oxide (65 %) Silver, Powder (5 %) | Article: 132944 (0.01) Supplier: Primary Name: Names: | demo-article_01 | on cle_01 | Partial declaration: Process flag: Language en HS Release comme | | | | | |
| | D. no.: | demo-article_01 | mo: | 11 | | | Valid until: | | |
| | Measured Weight | | 10 g | - | | | | | |
| | Tolerance (+/-) | | % | | | | | | |
| - | Calculated Weight | | 2 g | - | | | | | |
| | Deviation | | -80 % | | | | | | |
| | • | | | | | | | | |

Figure 54: Article – Specific Input Mask

The following information must be added: Supplier, Primary Name, ID no and Measured weight. The contents of the different areas are explained in the following sub-chapters.

5.3.3.3.1 Article - IHS Information

Figure 55 shows the HIS tab register. The corresponding contents are described below.



| IH | IS Compliance Cha | racterisati | on 📔 Waste di | isposal Do | ocumentation H | listory | Product Volume | s Usage | e Scope | | | | |
|--------|--|-------------|---------------|-------------|------------------|-----------|----------------|-------------|--------------------|---|-------|--|---|
| 🖃 i | iPCA ID: 1777343 (0.01) | | | | | | | | | | | | |
| | Supplier: | - | - | | | | * * | | | | | | |
| | Primary Name: Erzeugnis Partial declaration: | | | | | | | | | | | | |
| Names: | | | | | | | - + | Process fla | ig: | | | | |
| | Description | | | | Language | | - | Notificatio | on: | | | | |
| | 1 Article | | | | 👬 en | | Release Da | ate: | 🥖 10 - In progress | | | | |
| | 2 Article franz. | | | 🛄 fr | | | IHS Release | e comment: | | | | | |
| | | 3 | Erzeugnis | | | 💻 de | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | Article no.: | Erze | ugnis | IHS no.: | | | | Valid until | | | | | |
| | Standard: | | | | | | | | | | | | |
| | Measured Weight | | 0.001 | ka 🔻 | | | | | | | | | |
| | Tolerance (+/-) | | | % | | | | | | | | | |
| | | | | | | | | | | | | | |
| | Calculated weight | | • | кg Ψ | | | | | | | | | |
| | Deviation | | -100 | % | | | | | | | | | |
| | | | | | | | | | | | | | |
| E. | Classification | | | | | | | | | | | | |
| | Classification | | 1 | | | | | | | | | | |
| | Classification | | Name | | Туре | | Language | | ISO Classificatio | n | Group | | + |
| | | | | | | | | | | | | | - |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | Usage information | | | | | | | | | | | | |
| | | | | | | | | | | | | | |
| | Creator: Georg Kör | nnecke | L | ast editor: | Jochen Lauxmann | [VOITH-T] |] | | | | | | |

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Figure 55: Article - IHS detail information panel of an article

The following attributes are provided by the IHS Information panel.

- Note type and Version: At the top of the IHS information panel the node type (article in this case) and the current version number are visible (in parenthesis).
- Supplier: To select the supplier click the "binoculars" icon. The search window for the supplier selection search opens. The supplier with the appropriate address shall be selected and accepted. With the "scissors" icon the entry of the supplier can be removed.
- Primary name: Name used internally for the article. As you edit this field other functions are deactivated. To activate them please set the cursor in another place of the window (by clicking on another field or tip the tab key e.g. click or remove the cursor to the next field "Names").
- Names (in a variety of languages): Additionally definition of further names in different languages is available (the standard languages are: English, German, French and Spanish).

IHS - Status and release information

The information about the status of an article are visible on the right hand corner of the IHS detail screen and includes:



- Partial-declaration: If the option is selected, the system does not require, for the marked article, a
 full material declaration. That means, in the product tree "substance gaps" will be accepted. This is
 currently a common practice in the supply chain to deliver partial material declaration (according
 to low requirements like EU-RoHS-directive or REACH-regulation).
- Process flag: By checking this field this article is marked as a "process article" only (not included in the end product). This is especially relevant for chemical mixtures. Note for mixtures: only process mixtures can have other mixtures as children.
- Notification: Marking of the notification of the part. For more information for this function please see the separate "REACH-User Manual".
- Release date: Date of status setting
- IHS Release comment: Free editable comment can be entered from the releasing of an article.
- Valid until: date of validity (regarding to compliance status)

5.3.3.3.2 Article - Characterization

The "Characterization" register has two sub-registers.

- General: Contains the standard characterization properties Colour, Odour and aggregate state, which includes input fields for editing formula and characterization (see Figure 56).
- Other properties: Contains the physical and chemical properties defined by the customer (see Figure 57). These physical/chemical properties can be created and edited in the master data dialog box in chapter 3.5.4.2.1 Master Data Physical- / Technical properties

The physical-/ technical properties includes the article/mixture characteristics as pH-Value, flash point, odour, colour, etc. It is possible to define own properties or edit the existing ones.

Physical Properties.

| IHS | Con | npliance | Characterisation | Waste disposal | Documentation | History | Product Volumes | Usage Scope | |
|--------|----------|-----------|------------------|----------------|---------------|---------|-----------------|-------------|-------------|
| Gene | ral | Other pro | perties | | | | | | |
| Coloui | r: | | | • | | | | | |
| Odour | : | | | • | | | | | |
| Aggre | gate st | ate: | | • | | | | | |
| Formu | ıla: | | | | | | | | |
| Charao | cterisat | tion: | | | | | | | 🇮 English 👻 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Figure 56: Article - General Characterization panel with the standard properties


| Ingre | edient | s | | | | | | | | | |
|--------------------------------------|--------|----------------|--------------------|----------|----------------|---------------|---------------|-----------------|-----------|------|----------|
| IHS | Ch | aracterisation | Waste disposal | Documen | tation Com | | | | | | |
| General Physical/chemical properties | | | | | | | | | | | <u>^</u> |
| | | | | 1 | | | | | | | |
| | | Usage type | Property | Standard | Test condition | Minimum value | Maximum value | (Average) Value | Tolerance | Unit | Ξ |
| | 1 | Substancegroup | Pyrophoric liquids | | | | | 0 | | % | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

Figure 57: Article - The characterization panel with the customer defined physical and chemical properties

5.3.3.3.3 Article - Waste disposal

In the waste disposal register, the user can select text phrases from the European Waste Catalogue (EWC) and add references to the selected article (see Figure 58) clicking the "+" icon on the right side.

|) | | | | × |
|------|-----------------------|--|----------------------------------|---------------------|
| | 🖶 English 📕 German | Group: | | show deleted record |
| Data | | Search Reset | Info: 970 rows fou | ınd! |
| | Code | Description | Group | Language |
| 1 | 01 00 00 | WASTES RESULTING FROM EXPLORATION, MINING, QUAR | RYI European Waste Catalogue1 | en 🔺 |
| 2 | 01 01 00 | wastes from mineral excavation | European Waste Catalogue1 | en 📑 |
| 3 | 01 01 01 | wastes from mineral metalliferous excavation | European Waste Catalogue1 | 🗰 en |
| 4 | 01 01 02 | wastes from mineral non-metalliferous excavation | European Waste Catalogue1 | 🛲 en |
| 5 | 01 03 00 | wastes from physical and chemical processing of metallifer | ous European Waste Catalogue1 | 🛲 en |
| 6 | 01 03 04* | acid-generating tailings from processing of sulphide ore | European Waste Catalogue1 | 🚟 en |
| 7 | 01 03 05* | other tailings containing dangerous substances | European Waste Catalogue1 | en 🔛 |
| 8 | 01 03 06 | tailings other than those mentioned in 01 03 04 and 01 03 0. | 5 European Waste Catalogue1 | an en |
| 9 | 01 03 07* | other wastes containing dangerous substances from physic | al a European Waste Catalogue1 | en 🔤 |
| 10 | 01 03 08 | dusty and powdery wastes other than those mentioned in 0 | 1 03 European Waste Catalogue1 | an en |
| 11 | 01 03 09 | red mud from alumina production other than the wastes m | enti European Waste Catalogue1 | en 🔤 |
| 12 | 01 03 99 | wastes not otherwise specified | European Waste Catalogue1 | an en |
| 13 | 01 04 00 | wastes from physical and chemical processing of non-met | allife European Waste Catalogue1 | en en |
| 14 | 01 04 07* | wastes containing dangerous substances from physical and | l cheEuropean Waste Catalogue1 | en 🔤 |
| 15 | 01 04 08 | waste gravel and crushed rocks other than those mentioner | d in European Waste Catalogue1 | en 🔛 |
| 16 | 01 04 09 | waste sand and clays | European Waste Catalogue1 | en 🔤 |
| 17 | 01 04 10 | dusty and powdery wastes other than those mentioned in 0 | 1 04 European Waste Catalogue1 | 👬 en 👻 |
| • | | III | | F. |
| | | | | Apply Cancel |
| | | | | |

Figure 58: Articles - Edit the waste properties by using the European Waste Catalogue (EWC)

5.3.3.3.4 Article - Documentation



| iPCA | SAM-M – User Manual | R13 |
|------|----------------------|------|
| | Si an in Oser manual | 1120 |

In the "Documentation" area further documents can be stored that are relevant for the marked article. This may include, for example, safety data sheets, lab reports or vendor's own certificate of conformity (CoC). Furthermore the whole e-mail communication with the supplier or companies (your customers) that you supply to, (according marked article) is documented (see Figure 59). The documentation area is explained in detail in chapter 9.4.2.7 of the IHS User manual.

| | Description | Free text field / File Name / URL | Version no. | Version date | Document type | Name | Document format | Language |
|---|-------------|-----------------------------------|-------------|--------------|---------------|-----------|-------------------|----------|
| - | 123 | 123 | | | Not specified | | E Free input text | |
| 2 | | | | J Elbour | -0. | | | |
| 5 | Sender | Receivers | Subject | J Export | escane feet | Mail cent | Company | ame |

Figure 59: Article - Documentation

5.3.3.3.5 Article - History

| Demo Stecker Re | ot 🗖 🗖 🔀 |
|--------------------------|--|
| ▼ ▲ ⑧ 🖯 | # 🖉 😘 🕶 🦉 🐵 🏓 🚘 🖀 🔎 📅 🌏 😓 🕐 🖉 🌽 |
| Demo Stecker | IHS Compliance Characterisation Waste disposal Documentation History |
| Demo Ober Demo Mitte | Name of Responder: Request state: All |
| N/A: Demo | Request date: 2016/03/29 Release date: = |
| | Search Reset Data Name of requestor Name of Responder Request date Release date |
| < | |

Figure 60: Article - History panel



5.3.3.3.6 Usage scope

This criterion gives the possibility to add articles information about their place usage (e.g. company/ or production site.

| newArticle_51322 | | - D 🗙 |
|--------------------------------------|--|-------------------|
| × 🗟 \land 🔻 | - 🖉 🖋 = 🐁 📾 🐵 🛥 🖴 👂 💱 🔮 😓 ೋ 😻 🖉 | |
| newArticle_51322 | IHS Compliance Characterisation Waste disposal Documentation History Usage Scope | |
| | Current state: - | <u>^</u> |
| Zinc-chromate | Liszas Central | Amount (nor unit) |
| | usage scope. | |
| | | |
| | Usage Scope quantity [tone] Unit State Release date | Kind of Scope |
| | | |
| | | = |
| | | |
| | | |
| | | |
| | | |
| | <[| • |
| | Scono Dotails | |
| | Scope Details | |
| | Usages General Storage location Responsible person Documents | |
| | Site of usage Description Phrase code Applications Lise descriptor | Description |
| | Site of usage Description Prinase code Applications Ose description | |
| | | - |
| < | | • |
| | | |

Figure 61: Article – Usage Scope

5.3.4 Article - Editing

The article-specific input mask will open (see Figure 51) after creating an article. The relevant data regarding the (sub-) articles, mixtures, substances, their weight and attributes will be entered here.

This can be manually or automatically edited by using data-imports. The input mask already explained in the chapter 5.3.3.

5.3.5 Article - IHS Release status

After creating and validating an article, this article can be **released** for enterprise-wide use, can be temporarily **locked** or can be **prohibited** for enterprise-wide use. The IHS Release state can be set accordingly with the following steps:

- (1) Click on the Toolbar icon
 The pop up dialog box "Please choose the release type" appears
- (2) Select the desired IHS Released state:

0 – In Progress



- 3- Released
- 4-Prohibited
- 5- Locked
- 6- Restricted Use
- 11-Archived
- (3) Enter the correct release date (mandatory)
- (4) Complete the form by entering the remark (optional)Due of documentation purposes, we recommend that you always fill out the remark input field.
- (5) Confirm with the "Apply" Icon or click the "Cancel" Icon to cancel this process
 - a. If the selection state is selected to "released", the article is set to "Read-Only" and the version number is increased to then next full version.
 - b. If the selection state is selected to "locked" or "prohibited", the article is set to "Read-Only".



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Figure 62: Article - Set the IHS Release status

5.3.6 Article - Working copy – New Version

A working copy of an article will always be created if the existing full version (released version) is changed.

Example: The article "MyArticle" is released in version 2.0 for enterprise wide usage. This article has changed (for any reason) and the data must now also be changed within the iPCA application. Thus a working copy must be created as the full version 2.0 cannot be changed.

This can be done by creating a new version:

- Select the original article
- Click on "new version" below the search result list for articles
- Confirm the creation of the working copy: an editable copy of the article will be opened having a new version 2.01. Notice that the Article Version (in parenthesis) have been changed



| Name/Synonyme: | Shaft | | | IHS no.: | | | I | |
|------------------|-------------|----------------------|---------------|-------------------------|-------------|----------|--------------|--|
| Article no.: | La como | | | IHS Release status: | | | • | |
| | Current Ver | sion record and o | click New Ve | Status: rsion button | Active | | • | |
|) Extended | | 1 | | | | | | |
| | Search | Reset | | Info: 1 row | found! | | | |
| ata | | / | $\overline{}$ | | | | | |
| 6 Name | Article no. | Version | IPG no. | REACH relevance | REACH state | IHS Rel. | Release Date | |
| 1 Shaft Oil Pump | 8972398731 | 1.00 | | <u> </u> | | 0 | 2010/10/05 | |
| | | | | | | | | |
| | | | | | | | | |

Figure 63: Article - Create a working copy

The version number of an article is automatically changed, every time an article is requested again but with different rulegroups or changes in the BOM structure/content. This prevents the article list of getting longer but assures the accessibility of historic data at any time. The version number is shown in column "Version" (See Figure 64).

A new version can also be created manually, by clicking on "New version" (1). You can choose to only get the latest versions displayed by checking the box for "current version".

Note, that the version number is starts with anything larger than 0 (1.00, 2.01...) if the article is already released. If the article is not yet released, the version number starts with 0 (0.01, 0.02...).

When creating a new version, a copy of the current article is created and al article details can be changed. The new version number can be seen in the upper left corner (Figure 65). It stays as 1.01 (in this example) until the new version has been released. After release, the version number will change to 2.00.



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| 8 | Search | | | | | | | | | | [| |
|---|--------|-----------------|----------------|-------------|-------------|-------------|-----------|--------------|--------------|--------------|-----------------|----------|
| | Produc | t model Arti | icle Mixture | Article / M | ixture Basi | c substance | s SEP F | REACH requ | Jest | | | |
| | Na | ame/Synonyms: | | | | | IHS no.: | | | | | |
| | Ar | ticle no.: | | | | | IHS Relea | ase status: | | | | • |
| | St | andard: | | | | | iPCA ID | | | | | |
| | | | | | | | Valid to: | | | | | |
| | | | []] | | | | Valid to. | | Autor | | | |
| | | | Current versio | n | | | Status: | | Active | • | | |
| Ľ | ' Exte | ended | | | | | | | | | | |
| | 8te | | Sea | rch | Reset | | I | nfo: 260 rov | vs found! | | | B |
| L | Data | | | | | | | | | | | |
| | X | Name | Article no. | Standard | IHS no. | iPCA ID | Version | IHS Rel. | | Release Date | Release comment | Valid |
| | 10 | 234234 | 123 | | | 1793183 | 0.01 | / 10 - I | n progress | | | ^ |
| | 11 | 47111_A_B | 150 ml | | | 1996994 | 0.01 | 🥖 10 - I | n progress | | | |
| | 12 | [Worst Case D | G21953-003 | | | 1996737 | 0.01 | 🥖 10 - I | n progress | | | 2016/0 |
| | 13 | [Worst Case D | 000000000000 | | 000000000 | 1996743 | 0.01 | 🥖 10 - I | n progress | | | |
| | 14 | [Worst Case D | 000000001000 | | 000000001 | 1996696 | 0.01 | 🥖 10 - I | n progress | | | |
| | 15 | [Worst Case D | test000 | | | 1996877 | 0.01 | 🥖 10 - I | n progress | | | |
| L | 16 | [Worst Case D | 000000001000 | | 000000001 | 1996746 | 0.01 | 🥖 10 - I | n progress | | | |
| | 17 | a | 000000001000 | | 000000001 | 1994660 | 0.01 | 🥖 10 - I | n progress | | | |
| | 18 | ABB - plug | 000000000000 | | 000000000 | 1985588 | 0.01 | 🦯 10 - I | n progress | | | |
| | 19 | ABB - plug | 000000002000 | | 000000002 | 1994607 | 0.01 | / 10 - I | n progress | | | |
| | 20 | ABB - SIROAIR L | 000000000000 | | 000000000 | 1985582 | 1.00 | 🥑 70 - l | Unrestricted | 2014/05/05 | Test Voith | 2016/0 |
| | 21 | ABB - SIROAIR L | 000000001000 | | 000000001 | 1994600 | 0.01 | 📈 10 - I | n progress | | | - |
| | • | | | | | | | - | | | | F |
| | | | | | Load | | Delete | New vers | ion 🚺 | | | |

Figure 64: Article - Version number

| • 234234 | <i>8 21 −</i> °. <i>B</i> | @ ➡ ☞ ☞ 0 57 🖉 🏊 隊 🗿 | |
|------------------------------------|---|--|-------------------------------------|
| 234234 Hexamethylene bis[3-(3, | IHS Compliance Cl iPCA ID: 1793183 (0.02) | aracterisation Waste disposal Documentation | History Product Volumes Usage Scope |
| N-(2-aminoethyl)-N'-[3 | Supplier: Primary Name: | Voith GmbH Eiszeit | Partial declaratio |
| Hexasodium 2,2'-[vinyle | Names: | Description Langu | v + Process flag: |
| | | 1 dgfsdgf 2 234234 3 sdfsdfs 4 Einreit | ■ zh Release Date: |
| | Article no.: | Itsen III 123 IHS no.: | Valid until: |
| | Standard: Measured Weight | 213,123 g 🗸 | |
| | Tolerance (+/-) Calculated Weight Deviation | % 0 g ~ -100 % | |
| | <u> </u> | | - |
| < | • | III | 4 |

Figure 65: Article - New version number displayed during updating an Article

5.3.7 Article - Deactivation/Activation

With the icon "Deactivate" an article can be marked as deactivated (See Figure 66). This means that a deactivated article cannot be edited any more by users. Furthermore the deactivated articles are hidden



throughout the system and e.g. cannot be found with the standard search panels. Therefore they cannot be used any more by regular users.

Users which have the corresponding permissions can search for deactivated articles by selecting "deactivated" in the "Status" Combo Box. They also have the possibility to "re-activate" deactivated articles again after they search for deactivated articles.

Further information about deactivating/activating articles or mixtures can be found in chapter 22 of the separate IHS User manual.

| Product model Article Mixture Basic substar | nces SEP REACH re | equest | | | | |
|---|---------------------------------|----------------------------------|--|--|--|--|
| Name/Synonyme: Article no.: | IHS no.: IHS Release status: | | | | | |
| Current Version | Status: | Active 👻 | | | | |
| ± Extended | | Active Deleted | | | | |
| Search Reset | | Deactivated | | | | |
| V Name Auticlana Version IUS no. | REACH relevance R | EACH state IHS Rel. Release Date | | | | |

Figure 66: Article -Search for deactivated articles

5.3.8 Article - IPC1752 – Export

Exports the relevant material information of the selected article into a standardized file (standardized here is in accordance to IPC1752A-V.2).

The IPC-175x standards enables the data harmonization and data exchange for communication of material declarations within the supply chain. The standards IPC-1751A and IPC-1752A are important for the compilation of material declarations.

The data (products/mixtures and their material data) stored in iPCA can be exported in the version 2 as IPC1752 XML files using the "IPC" icon (See Figure 67).





Figure 67: Article – IPC1752 – Export

5.3.9 Article – REACH/ RoHS-Report

The report is the declaration to the general public or customers of the (non) conformity due to defined legal regulations.

The report will be generated based the selected material data sheet. The reports contain adequate references to the regulations and (if necessary) comments regarding exceptions, thresholds or (list of) affected substances.

The report can be generated within the data sheet from the menu bar using the printer icon (See Figure 68). In the new window you can select the required type of the report, print, preview and save it (in a wished folder).





Figure 68: Article – REACH/RoHS report

5.3.10 Article - Multi-Sourced Parts

Multi-Sourced Parts (MSP) are parts produced by different manufacturers which have exactly the same technical parameters and can be used alternative for the same application in the production process. MSP can have Different names, different manufacturer number but same internal purchase number (recognized by system). Different MSP can include different substances (See Figure 69).

MSP – parts with exactly the same technical parameters, but produced and delivered from different sources (supplier/manufacturer). MSPs will be recognized automatically by the IHS number (same number means a MSP). A MSP can be selected and replaced for another alternative part (See Figure 70).



Figure 69: Article – Multisource parts



| • M | ISP_BON | _001 | | | | | | | | | | | | | | | | | | | | | | | | • | × |
|-----|----------|--|-------------|------|-------|---------|------|--------|------------|--------|-----------|-------|---------------|--------|-------|------|------|-------|-------|-------|----|--------|----|---|------|---|---|
| ioi | ⊽ 🔺 | ۲ | 8 | Ж | 8 | s, • | - | - 6 | 6 | - mþ | 2 | Ē | \mathcal{P} | 5 | Ø | a | 0 | PC |) | | | | | | | | |
| | ASP_BO | N_00 | 1 | | IHS | Co | mpli | ance | Chi | aracte | erisat | ion | w | aste (| dispo | osal | 1 | Docu | ment | ation | | Histor | y | | | | |
| | n na h | Op | tions | Ule | | | | | b – | | | | | | | | | | | | | | | | | | - |
| 1 | | | | | | | | | | A | TS_S | up_0- | -2 | | | | | | | | | | | | | | |
| 1 | d | Cut | | | | | | | | | | | | | | | | | | | | | | | | | |
| | 0 | Ref | resh | | | | | | | | insports. | | | | | | | | | | | | | | | | |
| | ٢ | De | activa | te | | | | | | | | | | | | | | | | | | | | | | | |
| | - | Ne | w vers | ion | | | | | | | | Desc | ripti | on | | | | | | | La | nguag | ge | | | | |
| | | Cop | ру | | | c | | | 1 | | 1 | msp0 | 01B | | | | | | | | | | | 8 | en 🖥 | | |
| | - | Rep | nace | with | Multi | Source | a A | rticie | 1 | | | | | | | | | | | | | | | | | | = |
| | | Create SEP request Search SEP request | | | | | | | | | | | | | | | | | | | | | | | | | |
| | ei | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | = | Exp | Expand tree | | | | | | | | | | | | | | | | | | | | | | | | |
| | <u> </u> | Col | lapse | tree | | | | | | n | nsp00 |)1 | | | | THS | ino | | | | | | | | | | |
| | | Sea | arch | | | | | | | -op-or | | | | | | | | | | | | | | | | | |
| | 8 | Prir | nt Rep | ort | | | | | | | 9 | | 99 | g | g 👻 | | | | | | | | | | | | |
| | 1. | MS | DS | | | | | , | | | | | | | | % | | | | | | | | | | | |
| | | | | | Cal | culate | d W | eight | | | | | | | 19 | g | Ŧ | | | | | | | | | | |
| | | | | | De | | | - | | | | | | | 001 | | | | | | | | | | | | |
| | | | | | De | viation | 1 | | | | | | -80 | .808 | 081 | 70 | | | | | | | | | | | |
| | | | | | Qu | antity: | | | | | | | | | 1 | | | | | | | | | | | | |
| | | | | | Pos | no: | | | | | | | | | 1 | Ma | tche | ed nu | imbei | rs: | | | | | | | Ŧ |
| • | III | | | F. | • | | | | | 11 | 1 | | | | | | | | | | | | | | | • | • |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Figure 70: Article – Multisource parts - Replacement

5.3.11 Article - Data approval and rejection

The Material Data Sheet (MDS) is in the system collected data regarding articles of mixtures. The MDS have to be approved prior to use them in your organization. The version number of the MDS indicates the progress of the approval process:

- Version Number X.YY (See Figure 71)
- After approval the X will be incremented
- Whereas in the working version YY increments

A sheet approval can be made in the following ways:

In the Datasheet (See Figure 71)



Figure 71: MDS – Approval - Datasheet



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|------|---------------------|-----|
| | | |

Accepting the SEP request (depending on the system version/license) as shows the Figure 72

| Edit | Сору | Delete | Show | Email-His Send | em | Accept | Reject |
|------|------|--------|------|----------------|----|--------|--------|
| | | | | | | | |

Figure 72: MDS – Approval – SEP request

The possible status messages are shown in the Figure 73

| • Please choose release type | e X |
|------------------------------|------------------------------------|
| IHS Release status: | 🖊 0 - In Progress 💌 |
| Release Date: | / 0 - In Progress |
| Calculated valid until date: | 4 - Prohibited |
| Remark: | S - Locked |
| | II - Archived |
| | b. |
| | |
| | |
| | Apply Cancel |
| | Cancel |

Figure 73: MDS – Approval – Status messages

- In Progress: The Article / Mixture is new and has not been checked yet (e.g. by the Toxicology or Chemical Risk Assessment department).
- Released: The Article / Mixture has been successfully tested and released for enterprise-wide use.
- Prohibited: The Article / Mixture has been verified and is prohibited due to its attributes. An enterprise-wide use is not allowed.
- Locked: The Article / Mixture has been locked and is temporary not available (e.g. because its risk assessment is currently being evaluated).
- Restricted use: The Article / Mixture has been restricted. The usage of the Article / Mixture is
 restricted to special organization units and/or to special applications.
- Archived: The Article / Mixture has been archived.

5.3.12 Article - REACH Relevance

REACH relevance means whether a mixture or an article includes a substance which is affected by REACHregulation or not. An example being, substances from the SVHC Candidate List (Substances of Very High Concern) – published by ECHA (European Chemicals Agency), substances listed in Annex XIV or Annex XVII, or the information regarding registration number, authorisation, etc. This status can be set manually.



The following states are the available (See Figure 74):

- Not set: The REACH relevance has not yet been set for this object Symbol: Symbol:
- Not relevant to REACH : The REACH relevance has not been set for this object as it is not relevant regarding REACH
 Symbol: *
- Relevant to REACH : The REACH relevance has been set for this object as it is relevant regarding REACH
 Symbol:

| 🄲 Sea | rch | | - | | | | | | | | |
|-----------------|------------------------|------------|----------|-----------------|--------------|-----------|------------|---------------------------|-----------------|-------------|---|
| VP | Product model | Article | Mixture | Article / Mixtu | e Basic s | ubstance | s SEP | | | | |
| | lame/Synonyms: | | | | IHS | no.: | status | | | | |
| P | Article no.: | | | | | tus: | status. | Active | | | |
| □ _{Ex} | tended | | | | Va | id to: | | | | | |
| Dat | Sear | ch R | eset | Info: 2 | 2501 data re | cords sh | own (ma | ore <mark>da</mark> ta av | ailable) | | |
| Data | 1 | 1 | 1110 | ,, · | | | D 1 | be P.D. | | DEAGU III | |
| | Name EngineChildTec | Article no |). IHS I | NO. Version | IHS Kel. | Relea | Release | Valid to | REACH relevance | REACH state | |
| 2 | EngineChildTes | Web-Serv | vice Web | -Serv. 0.01 | / 0 - In | | | | 5 | | |
| 3 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | / 0 - In | | | | 5 | | |
| 4 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | / 0 - In | | | | 5 | | |
| 5 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | / 0 - In | | | | 5 | | |
| 6 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | / 0 - In | | | | 5 | | |
| 7 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | 🖊 0 - In | | | | 5 | | |
| 8 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | 🖊 0 - In | | | | 5 | | |
| 9 | EngineChildTes | Web-Serv | vice Web | -Serv 0.01 | 🥖 0 - In | | | | 5 | | * |
| | | | | Load | Delete | New vers. | . IPC1 | 752 | | | |

Figure 74: Article - REACH

REACH Status

The REACH status indicates, whether a mixture or an article, contains substances regarding REACH, if so, more action is needed. The following states are available:

Not relevant to REACH: The REACH relevance has not been set for this object as it is not relevant regarding REACH

 Not set: The REACH status has not been set for this object yet Symbol: -



- Grey: The REACH relevance was set Grey for this object as it is not relevant regarding REACH. Therefore the REACH status is of no interest. Symbol:
- Green: The REACH relevance was set Green as this object already meets all the requirements regarding REACH Symbol:
- Yellow: The REACH relevance was set Yellow as this object does not meet all the requirements regarding REACH yet. Further activities need to be initiated to meet the requirements. Symbol:
- Red: The REACH relevance was set Red as this object does not meet all the requirements regarding REACH. No further activities have been taken as of yet.
 Symbol:

5.3.13 Article - Compliance Substance Inspector (CSI)

5.3.13.1 CSI - Definition

Articles and Mixtures can be analysed by the Compliance Substance Inspector (CSI).

The analysis (compliance check) of the legal conformity is performed on the basis of material (substances) data stored in the system. CSI considers the substance-related regulations, their requirements, restrictions, exception and deadlines.

The usage of the CSI and "How to analyse" is described in the "iPCA/CSI Compliance Substance Inspector" user manual. Please refer to this document for more information.

The compliance check will always be done on the highest level of the product tree. By clicking the icon "CC" (See Figure 75) a new window opens allowing the compliance "Rule Groups" selection and the due day (Figure 76). The number of existing test rules depends on the ordered license.



5.3.13.2 CSI – Group Selection

The group selection allows the definitions of the due date of the compliance check (day of validity) and the corresponding checking rules, according to the needed regulations. Those rules and regulations can be selected by multiply chose list (See Figure 76).

The types and number of available rule groups depends on your license can be selected.

By clicking on the "OK" icon the checking process will be started.



iPCA SAM-M – User Manual R13 X O Group Selection Following rule groups and due date combinations were used to check this MDS using CSI analysis from analysis panel: Due date Check date Result Rule Group (Version) Choose one or more rule groups for check. The result of this check will not be available in list above: Due date: 2016/04/09 • CM-Module US Conflict Minerals (Version: 2) CM-Module US Conflict Minerals (Version: 1) Proposition 65 (Version: 2) Ok Cancel

Figure 76: Article – CSI – Group selection

5.3.13.3 CSI – Check Results

The results are displayed in the CSI-tab automatically if violation of the defined rules occurs (See Figure 77). Otherwise, an information window opens with the message "No error".

| • ms_test_160115 | | | | | | | | | |
|--------------------------------|-----------------------------|------------------------------|----------------------------------|-------------|--|--|--|--|--|
| a 🔻 💩 🔒 🐰 🖉 🤊 | 🛟 🕶 🤚 🐵 👘 😰 🖡 | r 🔎 🦻 🌏 🗟 🕐 🦉 | <i>w</i> | | | | | | |
| ms_test_160115 | IHS Compliance Chara | acterisation Waste disposa | Documentation History | | | | | | |
| | Article: 132886 (1.00) | | | ^ | | | | | |
| | Supplier: | MAREK7_Lieferant1 | | | | | | | |
| | Primary Name: | ms_test_160115 | | | | | | | |
| N | Names: | | | | | | | | |
| | • | | | • | | | | | |
| | | | | | | | | | |
| CSI check | 0115 Due data: 2016/02/17 | | Chaur anhu arran | | | | | | |
| Checked Module/MDS: ms_test_16 | 0115 - Due date: 2016/03/17 | | Show only errors | | | | | | |
| Action Rule group | Type Name | Substance group | Substance info Classification Ap | plication | | | | | |
| 1 Error REACH Annex XVI | I Rule homMat_pb_1601 | 15a Repr. 1 | Lead chloride test 99 Ger | neral | | | | | |
| 2 Error RoHS (2011/65/E | Exemption homMat_pb_1601 | 15a Lead and its compounds | test 99 Lea | d as an all | | | | | |
| | | | | | | | | | |
| | 111 | | | 4 | | | | | |
| | Correct Copy Export Close | | | | | | | | |

Figure 77: Article – CSI – Check Results



5.4 Mixture

5.4.1 Mixture – Definition

The term Preparation (Mixture) will be used according to the REACH definition as "mixture or solution composed of two or more substances". The attributes of this node allow to represent it as a "homogeneous material" - due to RoHS Directive. Furthermore you can define additional specific types of the mixture, like "semi-components" or "construction materials".

5.4.2 Mixture - Search

Most features in the general functions of mixtures adequately cover the functions which are available for the articles.

The SAM-M search panels for Mixtures are divided into multiple function areas (see Figure 78):

- Standard search criteria (red area)
- Extended search criteria (blue area)
- Search result area (yellow area)

| 🕷 Sea | irch | | | | | | |
|-------|-------------------|------------|-----------|-------------------|---------------------|---------|---------------|
| VP | Product model | Article | Mixture | Article / Mixture | Basic substances | SEP | REACH request |
| - N | Jame/Synonyms: | | | | IHS no.: | | |
| N | Aixture no.: | | | | Std. mixt. no.: | | |
| т | rade name: | | | | IHS Release status: | | • |
| N | Aaterial typ: | | | - | Status: | Active | •] |
| v | /alid to: | | - 🗐 | | | | |
| | | Current | Version | | | | |
| 🔲 Ex | tended | | | | | | |
| Ad | ditional search p | parameters | | | | | |
| | Sea | arch F | Reset | Info: 1 | L6 rows found! | | |
| Data | a | | | | | | |
| X | Name | Trade nam | e Mixture | e no. IHS no. | Standard mixt. no. | Version | Release Date |
| 1 | test | | test | | | 0.02 | • |
| 2 | RM1 mixture | | 000000 | 0000 | | 1.00 | 2015/08/21 = |
| 3 | RM1 halbzeu | | 000000 | 0000 | | 1.00 | 2015/08/21 |
| 4 | test RoHS-Ex | | test Rol | HS-E | | 0.01 | |
| 5 | L1-4G EVA 10 | | 000000 | 0030 | | 1.00 | 2015/10/07 |
| 6 | L1-CC 4G EVA | | 000000 | 0030 | | 1.00 | 2015/10/07 - |
| • | III | | | | | | F |
| | | | Load | d Delete | New vers | | |
| | | | | | | | |
| | | | | | | | |

Figure 78: Mixture – Search panels



5.4.2.1 Mixture - Standard search criteria area

- Name/Synonyms: Name of the searched article. Enter the Mixture name/description as imported to search for a Mixture by its name.
- Mixture no.: Mixture-search by using an In-house number. Enter the Mixture number as imported to search for a Mixture by its Mixture number.
- Trade name
- Material type
- Valid to
- IHS no.: Enter the In house used Mixture number to search for a Mixture by its IHS number.
- Std. mixt no.
- IHS Release status: Mixture-search by using the approval status. Choose one of the statuses shown in the dropdown list to search for an Article by its in-house release status (See Figure 48).
- Status: Chose one of the states from the dropdown list, depending on whether you would like to search for "active" or "deleted" articles.

Mixtures can be searched using different criteria as site of usage, organizational use, supplier, classifications, etc.

5.4.2.2 Mixture - Advanced search criteria area

The additional search areas for mixtures can be seen clicking on "extended" and "additional search parameters" (See Figure 79). Most of the extended features were already explained in detail in the 5.3.2.2 section. The following sections describe the additional search fields for mixtures.



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| 🕷 Se | arch | | | | | | |
|------|--|-----------|---------|--|---|--------|---------------|
| VP | Product model | Article | Mixture | Article / Mixture | Basic substances | SEP | REACH request |
| | Name/Synonyms: Mixture no.: Trade name: Material typ: | | | | IHS no.: Std. mixt. no.: IHS Release status: Status: | Active | |
| , | Valid to: | | - 1 | | Status. | retive | |
| G | E | current | Version | | | | |
| | Usage Scope: Scope Release Stat. Classification: | | | Correction of the second | ganizational e st sub. check: pplications: | | |
| - | REACH relevance: | according | Search | RE parameter for cha | ACH state: aracterisation arch Parameters acc | ording | - |
| | Hazard symbol:: Carcinogen: Mutagen: Reprotoxic: | | | R- and S-phr | ases: | | + |
| | | Search | Reset | d Delete | New vers | | |

Figure 79: Mixture - Additional search areas

- Supplier: Search for a supplier by using the binoculars symbol besides the text field. A new search panel will open where further details on the supplier are requested in order to find him.
- Usage Scope: Search for a usage scope by using the binoculars symbol besides the text field. A new search panel will open where further details on the companies, legal units and contacts are requested in order to find it.
- Scope Release Stat.
- Classification: By using this search criterion, the user is able to search for articles by a defined classification. (See Figure 38)
- REACH relevance: Search for the REACH Relevance of the articles. The following search criteria are available: "Not set", "Not REACH-relevant" and "REACH relevant".
- Site of usage: This search criterion gives the possibility to find articles by their place of usage (e.g. company- or production site).
- Organizational use
- Last sub. Check
- Applications: Add or Delete fields of applications you want to look for by using the addition and minus icons.



• REACH state: Select the REACH state you want to get displayed in your search results from the dropdown menu.

Additionally to the standard and extended search functions the search for mixtures includes the following features (See Figure 80) corresponding to:

- The former System of Classification and Labelling of Chemicals (according to the directive 1999/45/EC the so called Dangerous Preparations Directive)
- The new System of Classification and Labelling of Chemicals (according to the regulation (EC) No 1272/2008 the so called CLP-Regulation: Classification, Labelling and Packaging of substances and mixtures).

| Search | | | | | | | | | | |
|-------------------|----------------|----------------|------------|----------------|------------|-----------------|--------------|----------------|--------------|-------------|
| Product model Art | icle Mixture | Article / Mix | ture Basi | c substances | SEP | REACH reques | t | | | |
| Name/Synonyms: | | | | | IHS no. | [| | | | |
| Material no.: | | | | | Standar | d material no.: | | | | |
| Standard: | | | | | IHS Rele | ase status: | | | | • |
| Trade name: | | | | | iPCA ID | [| | | | |
| Material Type: | | | | | Valid to | | | - 🛄 - | | |
| _ | current Vers | ion | | | Status: | | Active | • | | |
| ± Extended | | | 1 | | | | 5 | | | |
| Search parameter | according dire | tive 67/548/EW | G Search P | arameters acco | ording dir | ective GHS/CLP | Search paran | neter for char | acterisation | |
| Hazard symbol:: | | | • | R- and S-phra | ses: 5 | | | | | + |
| 2 Carcinogen: | | | • | | | | | | | - |
| 3 Mutagen: | | | • | | | | | | | |
| A Reprotoxic: | | | • | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | Search | Keset | | | | | | | |
| Name | Trada nam | a Material no | | Standard | IDCA ID | Version | Palazza Data | | Valid to | Pelezza co |
| - Name | naue nam | | | Stanuaru | II CAID | Version | Release Date | in o Nei. | Valid to | Inclease co |
| • | | III | | | | | | | | F |
| | | | Load | De | ete | New version | | | | |
| | | | | | | | | | | |

• Search for parameter and characterization of mixtures

Figure 80: Mixture - Additional Search parameters for mixtures (old system)

Mixture - Classification and Labelling of Chemicals (old system)

The search will be performed according to the former System of Classification and Labelling of Chemicals and includes the following characteristics:

(1) Hazard symbol: Search for the mixture where the selected hazard symbol is set. Possible selection criteria are:

C - Corrosive



- E Explosive
- F Highly flammable
- F+ Extremely flammable
- N Dangerous for the environment
- 0 Oxidizing
- T Toxic
- T+ Very toxic
- Xi Irritant
- Xn Harmful
- (2) Carcinogen: Search for the mixture where the selected Carcinogenic is set. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3
- (3) Mutagen: Search for the mixture where the selected Mutagenic is set. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3
- (4) Reprotoxic: Search for the mixture where the selected Reprotoxic is set. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3
- (5) R- and S-Phrases: Search for risk or safety phrases. The selection of the required R&S Phrases is done by a text phrase search dialog box which is opened after clicking the "+"icon. In this dialog the user can select the desired risk or safety text phrase (see Figure 81). After applying the selection, the text phrases appear at mixture search panel. After the selection of risk phrases in the search area below the corresponding phrases are displayed.



| O Selec | tion R/S phrases: | | | |
|---------|-----------------------------|--|---|----------------------|
| | English French German | Risk phrases Risk phrases Safety phrases | | show deleted records |
| Data | spanisn | | Search Reset Info: 133 rows found! | |
| % | Selection | Code | Description | Language |
| 1 | | R40/22 | Harmful: possible risk of irreversible effects if swallowed. | 📰 en 🔺 |
| 2 | | R40/21/22 | Harmful: possible risk of irreversible effects in contact with skin and i | en 🚟 |
| 3 | | R40/21 | Harmful: possible risk of irreversible effects in contact with skin. | 🚟 en |
| 4 | | R40/20/22 | Harmful: possible risk of irreversible effects through inhalation and if | en 🔠 |
| 5 | | R40/20/21/22 | Harmful: possible risk of irreversible effects through inhalation, in co | 🚟 en |
| 6 | | R40/20/21 | Harmful: possible risk of irreversible effects through inhalation and i | en 🔤 |
| 7 | | R40/20 | Harmful: possible risk of irreversible effects through inhalation. | 🚟 en |
| 8 | | RSh 3 | Contact with vapour causes burns to skin and eyes and contact with | en 🔠 |
| 9 | | RSh 2 | May cause photosensitisation. | 🔠 en |
| 10 | | D-L 1 | T | ▼ 32 |
| | | | | Apply Cancel |

Figure 81: Mixture - Switching between risk and safety phrases

Furthermore, the search can be specified by definition of the following categories:

Mixture - Classification and Labelling of Chemicals - GHS/GPL (new system)

The United Nations' Globally Harmonized System of Classification and Labelling of Chemicals (GHS) provides a harmonized basis for globally uniform physical, environmental, and health and safety information on hazardous chemical substances and mixtures.

Classification and labelling identify hazardous chemicals and inform users about their hazards through standard symbols and phrases. They need to be harmonized to ensure good worldwide understanding and to facilitate the free flow of goods. In the EU, the classification and labelling of hazardous chemicals is governed by Regulation (EC) No 1272/2008 on Classification, Labelling and Packaging of substances and mixtures (the 'CLP Regulation'). See http://ec.europa.eu/growth/sectors/chemicals/classification-labelling/index_en.htm

The search according to the new System of Classification and Labelling of Chemicals (GHS/CLP) can be done as illustrated in the Figure 82.



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| 🕷 Search | |
|---|--|
| Product model Article Mixture Article / Mixture Basic substances | SEP REACH request |
| Name/Synonyms: | IHS no.: |
| Material no.: | Standard material no.: |
| Standard: | IHS Release status: |
| Trade name: | iPCA ID |
| Material Type: | Valid to: |
| 🖉 current Version | Status: Active |
| + Extended | |
| Search parameter according directive 67/548/EWG Search Parameters acc | ording directive GHS/CLP Search parameter for characterisation |
| Signal word: ✓ Hazard class | ses & Hazard categories |
| Hazard | rard group Hazard class Hazard category |
| Pictograms Danger | |
| Hazard and | |
| | |
| | |
| | |
| | |
| | |
| | 2500 data anno da sharar (anno data ancibella) |
| Data | o: 2000 data records snown (more data available) |
| Name Trade name Material no. IHS no. Standard m | aterial po iPCA ID Version Release Date IHS Rel \ |
| | |
| Load | elete New version |

Figure 82: Mixture - Additional Search parameters (new system)

The additional search parameters for mixtures according the new system includes:

- (1) Signal word: Search for the mixture where the selected Signal word is set. Possible selection criteria are: Danger and Warning
- (2) Hazard pictograms: Search for the mixture where the selected Hazard pictogram is set. Possible selection criteria are:
- GHS01 Exploding bomb
- GHS02 Flame
- GHS03 Flame over circle
- GHS04 Gas cylinder
- GHS05 Corrosion
- GHS06 Skull and crossbones
- GHS07 Exclamation mark
- GHS08 Health hazard



- GHS09 Environment
- (3) Hazard and Precautionary Statements: Search for hazard or precautionary statements: The selection of the required precautionary and hazardous statement is done by a text phrase search dialog box which is opened after clicking the "+"icon (see Figure 80). In this dialog the user can select the desired hazard or precautionary (P&H) statement (see Figure 81). After applying the selection, the text phrases appear at mixture search panel. After the selection of P&H statements in the search area below the corresponding statements are displayed (See Figure 83).

| | English French German Spanish | Hazard Statements Hazard Statements Precautionary Stateme | ents | show deleted record |
|------|--|---|---|---------------------|
| Data | | | Search Reset Into: 104 rows found: | |
| % s | election | Code | Description | Language |
| 1 | | H420 | Harms public health and the environment by destroying ozone in th | 🛲 en 🔺 |
| 2 | | H350.2 | May cause cancer if swallowed. | 🛲 en |
| 3 | | H350.1 | May cause cancer in contact with skin. | 🛲 en |
| 4 | | H312+H332 | Harmful in contact with skin or if inhaled | 🛲 en |
| 5 | | H311+H331 | Toxic in contact with skin or if inhaled | 🛲 en |
| 6 | | H310+H330 | Fatal in contact with skin or if inhaled | 🛲 en |
| 7 | | H302+H332 | Harmful if swallowed or if inhaled | 🛲 en |
| 8 | | H302+H312+H332 | Harmful if swallowed, in contact with skin or if inhaled | 🔠 en |
| 9 | | H302+H312 | Harmful if swallowed or in contact with skin | 👬 en 🔻 |
| • | | | | Apply Cancel |

Figure 83: Mixture - Switching between hazard and precautionary statements

(4) Hazard classes & Hazard categories: Search Hazard classes & Hazard categories. The selection of the required Hazard classes & Hazard categories is done by a Hazard category search dialog which is opened after clicking the "+"icon. In this dialog box the user can select the desired Hazard classes & Hazard categories. By changing the selection of the "Hazard group" combo box, the user can switch between "Physical Hazards", "Health Hazards" or "Environmental Hazards" (see Figure 84). After applying the selection, the hazard category appears at the mixture search panel.



| O g | hs haza | rd classification search | X |
|-----|---------|---|----------------------|
| • | | Hazard group Physical Hazards Physical Hazards Health Hazards | Info: 16 rouge found |
| | Hazaro | Environmental Hazards | |
| | | Description | |
| | 1 | Explosives | A |
| | 2 | Flammable gases | |
| | 3 | Flammable Aerosols | |
| | 4 | Oxidising gases | • |
| | • | | • |
| | Hazaro | l category | |
| | | Selection | Description |
| | 1 | | Unst. Expl. |
| | 2 | | Expl. 1.1 |
| | 3 | | Expl. 1.2 |
| | 4 | | Expl. 1.3 |
| | 5 | | Expl. 1.4 |
| | • | | • |
| • | | Apply | Cancel |

Figure 84: Mixture - Selecting Hazard Classes & Hazard categories

Mixtures - Search according to the characterization

There are four characteristics by which the search can be sorted: Colour, Odour, Aggregate state or other properties (See Figure 85).



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| 🕷 Search | | | | | | | | | | - • • |
|----------------|-----------|-----------------|-----------------|------------|----------------|------------------|--------------------|----------------|------------------|-------------------------|
| Product mod | el Arti | cle Mixture | Article / Mix | ture Basic | substances | SEP | REACH request | | | |
| Name/Synonyms: | | | IHS no.: | | | | | | | |
| Material | 10.: | | | | | Standar | d material no.: | | | |
| Standard | | | | | | IHS Rele | ase status: | | | • |
| Trade na | ne: | | | | | iPCA ID | | | | |
| Material | ype: | | | | • | Valid to: | | | - 🛄 | |
| | | 🔽 current Versi | on | | | Status: | A | ctive | • | |
| Extended | | | | | | | | | | |
| Search | arameter | according direc | tive 67/548/EWG | Search Pa | rameters accor | rding dire | ective GHS/CLP | Search parar | neter for charac | terisation |
| | | | | | | | Colour | |] 🗕 🖌 🖌 | Remove |
| Search | criteria: | | | | | | Colour | | | |
| | | | | | | Aggregate state | | | | |
| | | | | | | Other properties | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| (ALB) | | Search | Reset | | Info: | 2500 dat | a records shown (r | more data avai | lable) | |
| Data | | | | | | | - | | | |
| 🔏 Name | | Trade name | Material no. | IHS no. | Standard mat | erial no. | iPCA ID | Version | Release Date | IHS Rel. |
| I ICu-DI | P-R750 | | CW0234-R250 | 1 | | | 1779250 | 1 01 | | / 10 - In progress 21 - |
| | | | ſ | beol | Dele | te | New version | | | |
| | | | | 2000 | | | - receiversion | | | |

Figure 85: Mixture - Search according to characterization

5.4.2.3 Mixture – Search results area

The possible actions for the displayed article are:

- Load: Opens the selected/marked article.
- Delete: Deleting an article leads to a total elimination of this data entry. This article cannot be found in the Article tab any longer. Click onto the article that should be deleted, then click on delete and on "Yes" if you are sure that you want to irreversibly delete this article.
- New Version: Deactivates the selected/marked article

5.4.3 Mixture - Creation

New Mixtures can be created either through the menu "File \rightarrow New \rightarrow Create Module" or by using by the corresponding icon \square in the toolbar. It opens the dialog box shown in the Figure 86.



| iPCA | SAM-M – User Manual | | | | |
|--|--------------------------|----|--|--|--|
| | | | | | |
| O Create new | | 23 | | | |
| | Please make your choice: | | | | |
| Article / Mixture: Article no. / Material no. | | | | | |
| Primary Name: | Article Mixtur | e | | | |
| Create a new substance: | | | | | |
| Substance no.: | Substan | ce | | | |
| CAS No.: | | | | | |
| Einecs/Elincs | | | | | |
| EU-Index: | | | | | |
| | Cancel | | | | |

Figure 86: Mixture - Creation

To create a mixture, a mixture number can be entered in advance in the corresponding field (see Figure 87). The mixture will be created by clicking on the mixture icon outlined in red.

Afterward the dialog window shown in the Figure 87 will be displayed. Here it is decided whether the preparation should be marked as a surface or not.

| Remark: | | x |
|------------|---------------------------|---|
| 1 | Mark mixture as surface ? | |
| <u>Y</u> e | s <u>N</u> o Cancel | |

Figure 87: Mixture - Dialog window: mixture marking as a surface material

By pressing "Cancel" the creation of a mixture will be discontinued.

After confirming by clicking on "Yes" or "Not" the input screen opens in which further information can be entered and edited.

The type and number of possible entries in this menu creation is dependent on the Compliance Agent licensed modules and the permissions of the user.

After creating a mixture, the mixture-specific mask will open (see Figure 88). All fields highlighted in orange are mandatory and must be completed. This can be done manually or automatically by using data-imports. The mask shows the following areas:



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- Action (red area)
- Area for status and release information (blue area)
- Navigation, show as the tree view (yellow area)
- Detail area (green area) with sub-tabs: IHS area, Characterization, Waste disposal, Documentation and History

| IHS Compliance C | Liassification & Labelling GHS Classification & La | beiling Characterisation I Transport | waste disposal Usage Scope | Documentation History |
|-----------------------|--|--------------------------------------|------------------------------|-----------------------|
| Mixture: 48582 (0.01) | | | | |
| Supplier: | 01_Lieferant_001 | * | Last sub. check | |
| Primary Name: | newNbdure_MDS | | Partial declaration: | |
| Trade name: | | | Process flag: | |
| Names: | | · · · · · · | | |
| | Description | Language - | Release Date: | 0 - In Progress |
| | | in ch | IHS Release comment: | |
| | | | | |
| | | | | |
| | | | | |
| | | | Valid until: | |
| | • | , | | |
| Mixture no.: | IHS no.: | | | |
| Std. mixt. no.: | | | | |
| Material type | | • | | |
| material type. | | | | |
| Classification | | | | |

Figure 88: Mixture – Specific Mask

The following information is mandatory: Supplier and Primary Name. The contents of the different areas are explained in the following sub-chapters.

5.4.3.1 Action area

The mixtures Specific Input Mask is similar to the articles mask. There are some differences in the content e.g. Only "substances" can be add. The "Article" icon is missing in the Mixture action area as shown in the Figure 89.



Figure 89: Mixture - Action Area



5.4.3.2 Mixtures - Navigation Area

The mixture-navigation area is displayed in a tree view. The following information is displayed corresponding to the respective node in the tree:

- Name of the mixture and sub nodes (main node)
- Percentage by weight (for substances under a mixture)
- Detailed, node-specific information will be displayed in the IHS-area by clicking/selecting a node.

Detailed, node-specific information will be displayed in the IHS-area by clicking/selecting a node.

By double-clicking on a node in the tree (mixture or substance) the corresponding part will be open in a separate window. In this window, the further editing of this (sub-) node is possible.

5.4.3.3 Mixtures - Detail area

Each mixtures may contain different details under the following categories: HIS, Compliance, Classification & Labelling, GHS Classification & Labelling, Characterization, Transport, Waste disposal, Usage Scope, Documentation and History

5.4.3.3.1 Mixtures-IHS Information

At the top of the IHS information panel you can see the object type and the current version number (See Figure 90) corresponding view of articles (see 5.3.3.3.1). Additionally the following specific attributes of mixtures are available here (marked in red and shown in Figure 90):

- Last sub. check: The date when the last substance substitution check was made
- Surface: Information where the mixture has been defined to be used as surface coating or not
- Process flag: Information where the mixture is defined as a "process mixture". In that case the
 mixture is not included in the end product. The "process mixtures" can have other mixtures as
 children (sub-nodes) and the symbol symbol will be in the activated in the menu panel (see Figure 90)



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| * test_RoHS-Ex_201508 | 128 | | | | | | |
|-----------------------|----------------------|----------------------------|--------------------------------|------------------|-----------|----------------------|----------|
| x 🖻 🔕 🕭 🛪 | <i>ø</i> • • • @ © | 🍬 🖻 🖉 🖉 🖗 🖗 | (Pc 🥑 | | | | |
| st_RoHS-Ex_20150 | IHS Compliance | Classification & Labelling | GHS Classification & Labelling | Characterisation | Transport | Waste disposal | Usage Sc |
| Lead (40 %) | Mixture: 44388 (0.0) | 1) | | | | | |
| est (10 %) | Supplier: | ABB Holding | | | * * | Last sub. check | |
| ▲ lead chromate | Primary Name: | test_RoHS-Ex_20150828 | | | | Partial declaration: | |
| | Trade name: | | | | | Process flag: | |
| | Names: | | | | • + | | |
| | | Description | Lan | quage | - | Release Date: | |
| | | 1 test RoHS-Ex 2 | 0150828 | 📾 en | | IHS Release comme | ent: |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | Valid until: | |
| | | | | | | | |
| | Mixture no.: | test RoHS-Ex 20150 |)828 IHS no.: | | | | |
| | Std mixt no: | | | | | | |
| | Stu. mixt. no | | | | | | |
| | Material type: | | | | | | |
| | Classification — | | | | | | |
| | | | | | | | |
| | Usage information | | | | | | |
| < | • | | III | | | | Þ |
| | | | | | | | |

Figure 90: Mixture - Detail view of the mixture IHS area

5.4.3.3.2 Mixtures- Classification & Labelling according to the former directive 1999/45/EC

In this area the classification & labelling of a mixture in accordance to directive 1999/45/EC can be set.

Note that the directive 1999/45/EC is legally valid until 1 June 2015. After that, the deadline applies only to the new CLP-Regulation (EC) No 1272/2008. In the meantime (until 1 June 2015) both prescription and specifications can be used for a safety data sheet.

For the classification & labelling according to directive 1999/45/EC the following attributes are provided:

- Hazard symbols. Set the hazards symbol of a mixture. Possible selection criteria are (see Figure 91):
- Mixture classification using Risk & Safety phrases (R- & S-phrases) "Risk"-and "Safety"-phrases can be searched by clicking binoculars icon. Within the "Risk"-and "Safety"-phrases search panel several R-and S-phrases can be selected at the same page (see Figure 91)
- Carcinogenic: Set the Carcinogenic category. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3
- Mutagenic: Set the Mutagenic category. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3
- Reprotoxic: Set the Reprotoxic category. Possible selection criteria are: Cat. 1, Cat. 2 and Cat. 3



| IHS | Compliance | Classification & Labelling | GHS Classification & Labelling | Characterisation | Transport Wast | te disposal Usage Scope | Product Volumes | Docu } ∢ [→ |
|--------|-----------------|-----------------------------|--------------------------------|------------------|----------------|---------------------------|-----------------|-----------------|
| Hazard | Symbols / Descr | iptions | CMR | | | | | |
| | Corrosiv | e (C) | Carcinogen Cat. 1 🗸 | Mutagen Cat. 2 | ✓ Reprotoxic | Cat. 2 👻 | | |
| | V Explosive | e (E) | Safety Phrases | | | | | <u>^ &@</u> |
| ۲ | 🔽 Highly fl | lammable (F) | | | | | | Ξ |
| ۲ | 🔽 Extremel | ly flammable (F+) | Risk Phrases | | | | | - |
| ¥ | 🗸 🔽 Dangero | ous for the environment (N) | | | | | | |
| 0 | V Oxidizing | g (O) | | | | | | |
| | 🛛 🗹 Toxic (T) |) | • | | | | | Þ |
| | Very toxi | ic (T+) | | | | | | |
| × | 🔽 Irritant () | Xi) | | | | | | |
| × | V Harmful | (Xn) | | | | | | |

Figure 91: Mixture - Labelling according to the directive 1999/45/EC

|) Selec | ct Saf | ety Phra | ises | | x |
|---------|--------|----------|---------------|--|---|
| | Sele | ction | Code | Description | |
| 1 | | | S62 | If swallowed, do not induce vomiting: seek medical advice immediately and show this container or label. | ^ |
| 2 | | | S63 | In case of accident by inhalation: remove casualty to fresh air and keep at rest. | |
| 3 | | | S64 | If swallowed, rinse mouth with water (only if the person is conscious). | E |
| 4 | | | S7 | Keep container tightly closed. | |
| 5 | | | S7/47 | Keep container tightly closed and at a temperature not exceeding °C (to be specified by the manufacturer). | |
| 6 | | | S7/8 | Keep container tightly closed and dry. | |
| 7 | | | \$3/9/14/49.1 | Keep only in the original container in a cool, well-ventilated place away from acids. | |
| 8 | | | \$3/9/14/49.2 | Keep only in the original container in a cool, well-ventilated place away from alkali. | |
| 9 | | | \$3/9/14/49.3 | Keep only in the original container in a cool, well-ventilated place away from metals. | |
| 10 | γ. | | \$3/9/14/49.4 | Keep only in the original container in a cool, well-ventilated place away from metal salts. | |
| 11 | | | S1 | Keep locked up. | |
| 12 | | | S1/2 | Keep locked up and out of the reach of children. | |
| 13 | | | S12 | Do not keep the container sealed. | |
| 14 | | | S13 | Keep away from food, drink and animal feedingstuffs. | |
| 15 | | | S14 | Keep away from (incompatible materials to be indicated by the manufacturer). | |
| 16 | | | S15 | Keep away from heat. | |
| 17 | | | S23 | Do not breathe gas/fumes/vapour/spray (appropriate wording to be specified by the manufacturer). | |
| 18 | | | S23.1 | Do not breathe vapour/aerosol. | |
| 19 | | | S23.2 | Do not breathe gas/vapour. | |
| 20 | | | S23.3 | Do not breathe gas/vapour/aerosol. | |
| 21 | | | S23.4 | Do not breathe vapour. | |
| 22 | | | S23.5 | Do not breathe aerosol. | |
| ∢ | | [] | C12.6 | N III | • |
| | | | | Ok Cancel | |

Figure 92: Mixture - Classification using S-Phrases according to the directive 1999/45/EC

5.4.3.3.3 Mixtures- GHS Classification & Labelling



In this area the classification & labelling of a mixture according to the regulation (EC) No 1272/2008 (Classification, Labelling and Packaging of substances and mixtures - CLP) can be set. The regulation (EC) No 1272/2008 is legally obligatory starting from 1. June 2015.

| Test_RoHS-Ex_201508 S ▼ ▲ ⑧ 日 ※ | 28 # # - * # @ @ # # # P 5 🔮 | - • • × |
|---|---|--|
| test_RoHS-Ex_201508 ▼ ▲ ④ ⊟ ▲ ▼ ▲ ● ⊟ ▲ ▼ test_RoHS-Ex_2015(▲ Lead (40 %) ← Tin (60 %) ▼ Test (10 %) ▲ lead chromate. ▲ copper di(aceta | 28 IHS Compliance Classification & Labelli Hazard pictograms | Image: Classification & Labelling Characterisation Transp Signal word Danger Image: Classification Hazard classes and hazard categories: Image: Classification Image: Classification Hazard group Hazard class Hazard categories: Image: Physical Hazard. Explosives Expl. 1.1 Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. Image: Physical Hazard. |
| | Skull and crossbones (GHS | Hazard class Environmental Hazards |
| | Exclamation mark (GHS07) | Hazard category |
| | Health hazard (GHS08) Environment (GHS09) | |

Figure 93: Mixture – GHS Classification & Labelling

The classification & labelling of mixtures provides the following attributes:

- Signal words: set the signal words of a mixture. Possible selection criteria are: Danger and Warning
- Hazard pictograms: set the hazards pictograms of a mixture. Possible selection criteria are shown in the Figure 94
- Mixture classification using the risk phrases (R-phrases): the "R-phrases" can be searched by clicking binoculars icon. Within the search panel several "R-phrases" can be selected and used (see Figure 94).
- Mixture classification using the safety phrases (S-phrases): the "S-phrases" can be searched by clicking binoculars icon. Within the search panel several "S-phrases" can be selected and used (see Figure 94).



| IHS | Compliance | Classification & Labelling | GHS C | lassification & Labelling | Characterisation | Transport | Waste disposal | Usage Scope | Product Volumes | Docu } - |
|--|------------|----------------------------|--------------------------------------|---|---|--------------------|----------------|-------------|-----------------|----------|
| Hazard pictogr | ams | | Signal | word 🗸 | | | | | | |
| a de la companya de l | Explo | ding bomb (GHS01) | Hazard | classes and hazard catego | ries: | | | | | |
| Å | | | | Hazard group | Hazard | class | | Hazard cat | egory | + |
| | GHS0 | :)2) | 1 | Health Hazards | Acute t | oxicity (inhalati | ve) | Acute Tox. | 3 | - |
| ٢ | Flame | over circle (GHS03) | | Health Hazards | Acute t | oxicity (inhalati | ve) | Acute Tox. | 4 | |
| \diamond | Sas cy | rlinder (GHS04) | Hazard H319 C H330 F | Statements: Causes serious eye irritation atal if inhaled. | h. | | | | | - 86 |
| \diamond | Corro | sion (GHS05) | H331 T H332 F H334 M | oxic if inhaled. Iarmful if inhaled. Aay cause allergy or asthma | a symptoms or breat | hing difficulties | if inhaled. | | | = |
| | Skull a | and crossbones (GHS06) | Precau | May cause respiratory irritat tionary Statements: | tion. | | | | | |
| () | Exclar | nation mark (GHS07) | P221 T P222 D P243 T P250 D | ake any precaution to avoi o not allow contact with ai ake precautionary measure o not subject to grinding/s | d mixing with combu ir. es against static disch shock//friction. | ıstibles arges. | | | | 86 |
| | 🔪 📝 Healti | h hazard (GHS08) | | | | | | | | |
| | ► Finviro | onment (GHS09) | L | | | | | | | |

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Figure 94: Mixture - Classification & Labelling of mixtures according to the regulation (EC) No 1272/2008

5.4.3.3.4 Mixtures- Characterization

The "Characterization" register has two sub-registers as for the articles (See subchapter 5.3.3.3.2).

- General: Contains the standard characterization properties Colour, Odour and aggregate state, which includes input fields for editing formula and characterization (see Figure 56).
- Other properties: Contains the physical and chemical properties defined by the customer (see Figure 57).

5.4.3.3.5 Mixtures- Transport

The "Transport" area provides input fields regarding the transportation information. The attributes that can be assigned to the mixture are as follows (see Figure 95):

- UN Number: UN numbers or UN IDs are four-digit numbers that identify hazardous substances, and articles (such as explosives, flammable liquids, toxic substances, etc.) in the framework of international transport (defined by the United Nations Committee of Experts on the Transport of Dangerous Goods)
- Hazard Number: also known as Kemler Code, are defined by the European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR) and describes the potential danger



posed by the transport of goods. The corresponding numbers and their meanings are available as a drop-down list.

- Packing group: defines the classification of substances and articles as dangerous goods, according to the European Agreement concerning the International Carriage of Dangerous Goods by Road (ADR). This agreement defines three packaging groups:
 - Packing group I: Substances with high risk
 - Packing group II: Substances with medium risk
 - Packing group III: Substances with low risk
- Storage class: for any hazardous substance that will be stored their risk characteristics is defined as a storage class (according to the "concept for storage of chemicals" provided by the German "Verband der Chemischen Industrie"). The corresponding classes and their meanings are available as a drop-down list.
- EAC Code : The Emergency Action Code (EAC) is a three character code displayed on all dangerous goods classed carriers, and provides a quick assessment to first responders and emergency responders (i.e. fire fighters and police) of what actions to take should a carrier transporting such goods become involved in an incident (traffic collision, for example). EAC's are characterized by a single number (1 to 4) and either one or two letters (depending on the hazard).
- Water Hazard class (WKG): is a term derived from the German water law and describes the potential water contamination of various substances. The corresponding classes are as a dropdown list available and are defined as:

Category 1: Low hazard to water Category I1: Hazard to water

Category 1II: Severe hazard to water

Furthermore the "Transport" area provides an input field regarding the Water hazard class and a "Remark" input field where the user can place special information.



| IHS Compliance Classification | n & Labelling GHS Classification & Labelling Characterisation Iransport Waste disposal Usage Scope Product Volumes Docu 💡 |
|-------------------------------|---|
| IN Number: | Hazard number: |
| DR Name: | |
| ackaging group: | Storage class: |
| lazard class: | EAC-Code: |
| DR tunnel code: | ▼ VOC content: ▼ |
| Vater hazard class (WGK) | |
| lass: | v |
| lemark: | 🔳 English |
| | |
| | |
| | |

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Figure 95: Mixture - The HIS - transport area

5.4.3.3.6 Mixtures- Waste disposal

In the waste disposal register, the user can select text phrases from the European Waste Catalogue (EWC) and add references to the selected mixture (see Figure 58).

5.4.3.3.7 Mixtures- Documentation

In the "Documentation" area further documents can be stored that are relevant for the mixture. This may include, for example, safety data sheets, lab reports or vendor's own certificate of conformity (CoC). Furthermore the whole e-mail communication with the supplier or companies (your customers) that you supply to, (according marked article) is documented (see Figure 59).

5.4.4 Mixture - Editing

After opening a mixture, the following dialog box opens (See Figure 88). The collection of relevant mixture data such as mixtures or substances can be entered either manually or by import. The editing of a mixture module is done via the editing mask (See Figure 88). All fields highlighted in orange are mandatory and must be completed. All already described areas can be edited: Action, Status, Navigation and Details areas.

As long as a mixture is not released, locked or prohibited it can be modified.

The information statuses of a mixture are visible on the right corner of the IHS detail screen. They include the IHS Release Status, the release date and additionally the release comment.

5.4.4.1 Mixture – Actions area

Through icons the application provides functions in order to manage the active mixture. Regarding the current context, only active icons are able to be used.

The available actions are the same as listed in the Article – Action area (5.3.3.1). Additionally the active mixture provides one more action:







By pressing this icon the linked material will be opened. This icon is active only when the selected mixture is linked with an iMDS material. Furthermore the iMDS module has to be licensed.

Function 2: For Safety Data Sheets (SDS):

Existing SDS are available through the action area in the context menu or in the product tree (by clicking the right mouse icon on the corresponding mixture).

5.4.4.2 Mixture – Navigation area – product tree

The substance composition of the mixture can be seen in the product tree. For each node the following information is displayed:

- Name
- Weight (for substances included in a mixture: percentage by weight)

By choosing a node with the mouse you get a detailed view.

- By using the icon "+" the structure of the node will get expanded
- By using the icon "-" the structure of the node will get collapsed

Note:

An area which contains the currently selected node cannot be collapsed – to collapse a node outside the area it must be selected first. By double-clicking on a mixture it will be opened in a new window.

5.4.4.3 Mixture – Detail area

The details view of the mixture that can be edited were already described in chapter Mixtures - Detail area5.4.3.3.

5.4.5 Mixture - IHS Release status

Setting the IHS Release status for a mixture works the same way as setting the HIS Release Status for an article as previously described in chapter 5.3.5- Article - IHS Release status.

5.4.6 Mixture - Working Copy – New Version

To create a working copy of a mixture works the same way as creating a working copy of an article as previously described in chapter 5.3.6.



By creating a new Article or Mixture the version number will be set to 0.01 automatically. If a Mixture or an Article is released, the version number is set to the next integer (e.g. $0.01 \rightarrow 1.00$, $3.02 \rightarrow 4.00$).

If an Article or a Mixture is created out of a working copy, a new version will be given away automatically. The assigned version number is the next decimal number (e.g. $1.00 \rightarrow 1.01$, $4.00 \rightarrow 4.01$, $0.01 \rightarrow 0.02$).

5.4.7 Mixture – Deactivation/Activation

Deactivating/activating a mixture works similar to articles - please refer to chapter 5.3.7 - Article – Deactivation/Activation.

5.4.8 Mixture – Compliance Substance Inspector (CSI)

See chapter 5.3.13

5.4.9 Mixture – REACH/ RoHS-Report

See chapter 5.3.9

5.5 Article/Mixture

In the Article/Mixture tab, both types of materials can be found. Please find all functionalities described in the corresponding chapter for Articles 5.3 or Mixtures 5.4.

5.6 Basic substances

5.6.1 Basic substances – Definition

The term "substance" will be using here according to the REACH Regulation definition: means a chemical element and its compounds in the natural state or obtained by any manufacturing process, including any additive necessary to preserve its stability and any impurity deriving from the process used, but excluding any solvent which may be separated without affecting the stability of the substance or changing its composition.

Most features of the general functions of substances are similar to the functions which are available for the articles or mixtures as described in chapters 5.3 and 5.4 (including the sub-chapters). Subsequent only the functions which are specific for substances are described in detail. In case of general functions (applicable for substances, mixtures and articles) only a link to the relevant subchapter will be provided.

Note: usually the system will be provided including database of predefined substances.

5.6.2 Basic substances – Search

In addition to the search functions described in chapters 5.3.2 and 5.4.2 the search for substances includes further specific parameters (like CAS-No. EU-Index, EINECS-No – see Figure 96).


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| 🕷 Search | | | | | |
|-----------------------|---------------------------|------------------------|-----------------------|-------------------|-----------------|
| Product model Article | Mixture Article / Mixture | Basic substances SEP | | | |
| Name/Synonym: | | GADSL categories: | requires declaration: | 🔘 Yes 🔘 No | N.A. and ▼ |
| CAS No.: | | | is forbidden: | 🔘 Yes 🔘 No | N.A. |
| EU-Index: | | REACH-SVHC: | N.A. 👻 | Туре: | |
| Einecs No.: | | Substance group types: | · · · · | Substance groups: | T |
| | Status: Active | REACH relevance: | · · · | REACH state: | • |

Figure 96: Basic substances - Search parameters

The extended search area includes the corresponding search criteria for mixtures (described in chapter 5.4.2.2) according to:

- The former System of Classification and Labelling of Chemicals (according to the directive 67/548/EEC the so called Dangerous Substances Directive)
- The new System of Classification and Labelling of Chemicals (according to the regulation (EC) No 1272/2008 the so called CLP-Regulation: Classification, Labelling and Packaging of substances and mixtures).
- Search for parameter and characterization of mixtures

5.6.3 Basic substances – Creation

New substances can be created either through the menu "File \rightarrow New \rightarrow Create Module" or by using by the corresponding "document" icon in the toolbar. It opens a dialog box as shown in Figure 97.

| Create new | × |
|---|--------------------------|
| | Please make your choice: |
| Article / Mixture: Article no. / Material no. Primary Name: | Article |
| Create a new substance: Substance no.: | Substance |
| CAS No.: Einecs/Elincs | |
| EU-Index: | Cancel |

Figure 97: Substances - Creation



The substance will be created by clicking the "substance" icon, after filling the substance number and at least one of the three numbers (CAS, EINECS or EU-Index). By pressing "Cancel" the creation of a substance shall be discontinued.

One or a combination of the following numbers is mandatory:

- CAS Number
- Einecs / Elincs Number
- EU-Index Number

If none of the numbers is entered the following error message will be displayed (Figure 98) and the process will not be continued.

| 🕞 Creat | tion error |
|---------|--|
| | While creating a new substance one of the following numbers has to be filled in: CasNo or EineccsElincs or EuIndex |
| | Close |

Figure 98: Substances - Error while creating a substance

Note: In the iPCA application the following two kinds of substance types are available: HIS and IMDS

Substances with type IMDS are only available when the iMDS module is active. Then the substances will be downloaded from the IMDS Online Portal. By using the described way of creating a substance, the substance is always created as an IHS substance.

Note: The type and number of possible entries in this menu creation is dependent on the Compliance Agent licensed modules and the permissions of the user.

After creating a substance, the following mask opens (Figure 99).



| • newMixture_48584 | ŀ | | | | - |
|---|----------------|-------------------|----------------------------|----------------------------|-----------------------|
| ▼ A B ¥ | 🦉 🍕 • 😘 | | r 👂 🦻 🖉 🥥 🦉 🔍 🕯 | | |
| ▼ newMixture_4858 | IHS Commo | on substance data | Classification & Labelling | GHS Classification & Label | ling Characterisation |
| Octan-3-one ((▲ methanol (0 %) | Туре: | Basic substance | Substance T | IHS | ^ |
| | Name: | methanol | | | |
| | Substance-N | 8 | IHS-Number: | | |
| | Einecs/Elincs: | 200-659-6 | | | |
| | EU-Index: | 603-001-00-X | Confidential: | | |
| | CAS No.: | 67-56-1 | Reg. Date: | | E |
| | GADSL categ | | REACH-SVHC | | |
| | Supplier: | | | | |
| | Pos-No: | 2 | | | |
| | Portion | From | % to | • % (0 %) | |
| | | © Fix | 0 % | | |
| | Substance g | Name | | Туре | Version |
| | | 1 3. Liquid subs | stances | iPoint-REACH | 3 |
| | | 3 Substances w | rith exposures | iPoint-Proposition 65 | 1 |
| | | 4 Substances w | ith exposures | iPoint-Proposition 65 | 2 |
| | | 5 RISL P(AR) +E | O(FA) (without REACH ANNE | X iPoint-RISL | 1 |
| | | BISL D(FA) - a | III applications | IPoint-RISL | 4 |
| <u>∢ </u> | | | | | |
| | | | | | |

Figure 99: Substances – Specific Mask

The dialog mask of a Substance is divided into three areas: Actions (red), Navigation in the tree view (yellow), and Details (blue) – divided into furthermore areas. The meaning of the different areas is explained in the following sub-chapters.

5.6.3.1 Substance – Action area

Through icons the application provides functions in order to manage the active substances. Regarding the current context only active icons are able to be used.

The following functions are available:



With this drop down icon the reach relevance can be set. See chapter 5.3.12 for more information.

All other icons are standard functionality were already described and are described in detail in the REACH User manual, chapter 10.



5.6.3.2 Substance – Navigation area

Basic substances do not have a structure view, because there is always only one entry at the root of the tree.

5.6.3.3 Substance – Details area

The details view of the basic substance is divided into multiple areas:

HIS, Common substance area, Classification & Labelling, GHS Classification & Labelling, Characterization, Transport, Waste disposal, Toxicological information, Environmental information, Documentation

The contents of the available tabs "Characterization" and "Waste disposal" are similar to articles and mixtures and are already described in chapter 5.3.3.3 and 5.4.3.3.

The contents of the tabs "GHS Classification & Labelling", "Classification & Labelling" and "Transport" are adequate to mixtures and are already described in chapter 5.4.3.3. In addition to that there are available:

- Common substance data
- Toxicological information and
- Environmental information

Not provided for substance is:

History

5.6.3.3.1 Substance - IHS

The IHS Information area of basic substances shows a short summary of the important attributes. Most of them are provide by the IMDS Online portal.

The "Substance Type" attribute indicates that a substance is an IHS Substance or an IMDS Substance. In both cases the IHS Information panel cannot be edited because it is only for information (See Figure 100).



| IHS Co | ommon substance data | Classification & Labelling | GHS Classification & Labell | ing Characterisation | <u> </u> |
|-----------|----------------------|----------------------------|-----------------------------|----------------------|----------|
| Type: | Basic substance | Substance T | IHS | | |
| Name: | methanol | | | | |
| Substanc | e-N | IHS-Number: | | | |
| Einecs/El | incs: 200-659-6 | | | | |
| EU-Index | : 603-001-00-X | Confidential: | | | |
| CAS No.: | 67-56-1 | Reg. Date: | | | Ξ |
| GADSL ca | iteg | REACH-SVHC | | | |
| Supplier: | | | | | |
| Pos-No: | 2 | | | | |
| Portion | From | % to | • % (0 %) | | |
| | © Fix | 0 % | | | |
| Substance | e g Name | | Туре | Version | |
| | 1 3. Liquid sub | stances | iPoint-REACH | 3 | |
| | 2 REACH Anne | x XVII no. 40 | IHS | | |
| | 3 Substances w | ith exposures | iPoint-Proposition 65 | 1 | |
| | 4 Substances w | of the exposures | iPoint-Proposition 65 | 2 | |
| | S RISL P(AR) +1 | D(FA) (WITHOUT REACH ANNE) | IPOINT-KISL | 1 | |
| | KISL D(FA) - a | | IPUIII-MISL | 4 | - |

Figure 100: Substances - IHS Information

5.6.3.3.2 Substances - Common substance data

The "Common substance data" panel provides the following attributes (Figure 101):

- Supplier: Select the supplier by clicking the binoculars icon. The search window for supplier selection opens. The supplier with the appropriate address shall be selected and accepted. With the "scissors" icon the entry of the supplier can be deleted.
- Primary name: Name used internally for the substance (mandatory field). It is recommended to use uniform/unitized names for substances (e.g. according to EINEECS)
- Names (in a variety of languages): To perform the search in different languages, you can define different particular designation in the given languages (standard: English, German, French and Spanish). It is recommended to use uniform/unitized names for substances (e.g. according to EINEECS)
- Synonyms (in a variety of languages): To perform the search in different languages, you can define different particular designation in the given languages (standard: English, German, French and Spanish).
- Substance number: The standardized substances numbers are provided, like: CAS no., IHS no., Einecs/Elincs, EU-Index (Read only if substance type is IMDS). Additionally are the freely definable entry fields available (HIS-No. and Substance No.)



- Classification: Several classifications can be selected for an article. The assignation of a classification can be done by clicking on the "+" icon. That opens a new dialog window (see Figure 102).
- Reg. Date: Registration Date: The date until the substance has to be registered at ECHA (is to read only).
- GADSL category: The GADSL category is provided by IMDS. This field is read only if the substance is labelled as an IMDS type (see Global Automotive Declarable Substance List (GADSL) website). The possible GADSL categories of substances are: Requires declaration or Is forbidden
- REACH-SVHC: Means the classification of the substance to the ECHA Candidate List of SVHC (see Candidate List of Substances of Very High Concern for authorization). It is an optional parameter only if the substance is labelled as an IMDS type (the information/parameter setting will by imported from the IMDS system)

| IHS | Common s | ubstanc | e data | Classification & L | abelling | GHS Classification | on & Labelling | Characterisation | Transport | Was | te dis | posal 1 | Foxicological | information | En |
|-------|---------------|---------|-----------|--------------------|-----------|--------------------|----------------|------------------|-----------|-----|--------|------------|---------------|---------------|----------|
| 🖃 Sub | ostance | | | | | | | | | | | | | | |
| s | upplier: | | | | | | | | | | | | | * | X |
| P | rimary Name: | Chroms | äure | | | | | | | | | Reg. Date: | | | |
| N | lames: | | | | | | | | | • | + | GADSL cat | tegory 🛛 | Requires decl | laration |
| | | | | | | | | | | | | | V | Is forbidden | |
| | | | Descripti | on | | Lar | nguage | | | | - | | | | |
| | | 1 | Chromic | acid | | | | 📷 en | | | | REACH-SV | /HC | | |
| | | 2 | Chromsä | ure | | | | 💻 de | | | | | | | |
| s | ynonyms: | | | | | | | | | v | + | | | | |
| | | | Descripti | on | | L | anguage | | | | - | | | | |
| | | 1 | Chromic | anhydride | | | | 🔠 en | | | | | | | |
| | | 2 | Chroman | hydrid | | | | 💻 de | | | | | | | |
| | | 3 | Chromic(| VI) acid | | | | 🛲 en | | | | | | | |
| | | 4 | Chrom(V | l)säure | | | | 💻 de | | | | | | | |
| | | 5 | Chromiu | m trioxide | | | | 🔠 en | | | | | | | |
| | | 6 | Chromtri | oxid | | | | 💻 de | | | | | | | |
| c | CAS No.: | 7738-9 | 4-5 | IHS No.: | | Su | ubstance no.: | | | | | | | | |
| E | inecs/Elincs: | 231-80 | 1-5 | EU-Index: | 024-017-0 | 0-8 | | | | | | | | | |
| e da | stification | | | | | | | | | | | | | | |
| | Jancation | | | | | | | | | | | | | | |

Figure 101: Substances - Common substance data



| iPCA | CA SAM-M – User Manual | | | | | | |
|--------------------------|------------------------|-----------------------|-----|--|--|--|--|
| | | | | | | | |
| Selection classification | | | x (| | | | |
| - Name ger | | Classification | | | | | |
| Name EN | | Туре | | | | | |
| Search | Reset | | | | | | |
| Data | | | | | | | |
| Classification Name | Ger. Name Eng. IS | O Classification Type | | | | | |
| | | | | | | | |
| 1 | Apply | Canaal | | | | | |

Figure 102: Substances: Selection classification

5.6.3.3.3 Substances – Toxicological Information

Substances can supply more information about health hazards and exposures (depending of used method of assessment), see Figure 103

| GHS Classification | n & Labelling | Characterisa | ition Trai | nsport | Waste disp |
|--------------------|---------------|--------------|------------|--------|------------|
| Health hazards | Exposition | | | | |
| Irritant and corro | sive effects | Data | | | |
| Acute eff | ects | Type | Met | hod | Species |
| Carcinoge | nicity | 1 | | | |
| Mutagen | icity | | | | |
| Phototox | icity | ļ | | | |
| Toxicity for rep | roduction | | | | |
| Sensitisa | tion | | | | |
| Single dose | toxicity | | | | |
| Repeated dos | e toxicity | | | | |
| | - | , | | | |
| | | | | | |
| | | | | | |
| | | • | | | |
| | | | | | |
| | | Type: | | | |
| | | Method: | | 5 | Species: |
| | | | + | | |
| | | | | | |

Figure 103: Substances – Toxicological Information

5.6.3.3.4 Documentation

The documentation area works similarly as it does for articles (explained in chapter 5.3.3.3.4). In addition to the common functions in the "Documentation" area there is one more icon called "Substance data sheet" available. By clicking this icon, it is possible to view the data sheet of the substance directly from the GESTIS online portal (see Figure 104).



| iPCA | SAM-M – User M | anual | R13 | |
|----------------------|-----------------------|--------------------|--------------|--|
| V 🛦 🕲 🖹 💥 🧔 | 🌾 - % 🖷 🐵 🔿 | r | a (PC 🕖 | Firefox - |
| osal Toxicological i | nformation Environr | mental information | Documentatio | DGUV-IFA GESTIS Stoffdatenbank + C gestis itrust.de 🟫 V C 🔄 Google 🔎 🌧 💼 |
| Documents | | | | IFA |
| Description | Free text field | / File Name / URL | Versic | GESTIS-Stoffdatenbank im Volibild öffnen! |
| | | | 1 | |
| • | III | | | |
| New Edit | t Delete Sl | how Export | Substanc | |
| emails | | | | |
| Sender | Rece | eivers | Subje | ct |

5.6.4 Basic substances - Editing

After opening a basic substance, the dialog shown in the box opens (See Figure 99). The collection of relevant substance data can be entered either manually or by import. The editing of a substance module is done via the editing mask (See Figure 99). All already described areas can be edited: Action, Status, Navigation and Details areas.

The IHS Information panel cannot be edited (it is only for your information).

5.6.1 Basic substances – Analysis – Usage

See chapter 3.3.3.2

5.7 Supplier Entry Portal Panel (SEP)

5.7.1 SEP – Definition

In the Supplier Entry Portal panel (SEP-Panel), all of the supplier communications will be managed. This especially includes:

- Requirements definition and creation for supplier requests
- Overview about the status of request and according supplier response
- Administrative system settings

5.7.2 SEP - Search

SEP Request can be searched using different criteria, among others Supplier, Request Date, Due Date.



The SEP panel and the SAM-M search panels are divided into multiple function areas (See Figure 105):

- The standard search criteria (red area)
- The extended search criteria (blue area)
- The search result area (yellow area)

The following describes the relevant functions of the additional search and status fields.

| 🕷 Se | earch | | | | | | | | - 0 🗙 |
|------|---|--|--|--|--|--|--|----------------------------------|---|
| VP | Product model | Article | Mixture | Article | / Mixture | Basic substance | es SEP | REAC | H request |
| | Supplier: Type of enquiry: Material type: State: Number: Name: ID: | All | | | Request Due dat Declarat Creator: Creatior | -Date: e: tion Type: n date: | All |) | Create |
| | Search | n Re | eset | | Info: 1954 | rows found! | | | |
| Da | ita | | | | | | | | |
| × | ID Number | | Name | | State | Due-date | Supplier | D | eclarati |
| | 443 00000000 473 00000000 658 SUBSTAN 754 00000000 863 SUBSTAN 1537 00000000 Edit Cop | 000000 000000 CE106 000000 CE115 00000 W | SUB3-SUB3 SUB2-SUB3 SUB1-SUB3 RAD1-MAT SUB1-SUB3 Delete | STANCE STANCE STANCE ERIAL7 STANCE Show | Rejected Review per Review per Re | by 2015/04/0 end 2015/04/0 end 2015/04/0 end 2015/04/0 end 2015/04/0 2015/04/0 s Send em | 2 YVelbTe 2 YVelbTe 7 YVelbTe 9 CMtest1 0 YVelbTe 7 TOMP2 Accept | st Fu st Pa st Pa st Pa | ill decla E artial de artial de artial de artial de gect |

Figure 105: SEP - Search Panel

5.7.2.1 SEP - Standard search criteria area

- Supplier: Search for requests sent to a particular supplier
- Type of enquiry: can be an article or a mixture



- Material Type
- State: Search for the current status of created request. Some of the available search criteria are shown in the Figure 106

| 🏶 Search | | | | | |
|----------------|-----------|--------------|--------|-----|----------|
| Product model | Article | Mixture | Artio | cle | / Mixtur |
| Supplier: | | | | | |
| Type of enqui | ry: | | | • |] |
| Material type: | | | | • |] |
| State: | F | inished | | • | |
| Number: | E | dited by Su | pplier | * | |
| Name: | R | eview pend | ing | | |
| ID: | R | eleased by | Suppli | | |
| | A | nswered m | anuall | | |
| | R | ejected by (| QΜ | | |
| Data | A | ccepted by | QM | Ξ | |
| | R | eleased | | | data C. |
| Nu Nu | Imper I | inished | | - | -date SL |

Figure 106: SEP - current status of created request

- Number: Search for part using the IHS-Number
- Name: Search for the part name
- ID: Search for the internally created current number of a request using its unique ID number

5.7.2.2 SEP - Extended search criteria area

- Request-Date: Search for requests sent in a given period (date from to)
- Due Date: Search for requests with defined request deadlines/ due date response (from to)
- Declaration Type: Search for requests with a defined declaration type (e.g. "Full declaration", "Partial declaration", "Negative declaration", "Imported declaration")
- Creator: Search regarding to request creator
- Creation Date: Search regarding to the date of creation the requests

5.7.2.3 SEP - Search Results Area

In the search result area the results are displayed. The active search area for search results shows the options for the displayed results (See Figure 107).



- Edit: Opens the selected/marked request in a separate widow in which a further editing is possible. This feature is only available for the unsent requests, otherwise is the edit-icon not active.
- Copy: An existing request can be opened, edited and saved in modified form again.
- Delete: Deletes the selected/marked request (not all request can be delated depending on the status)
- Show: The delivered data (supplier feedback) can be displayed in a separate window. This function is only available for released supplier feedbacks (otherwise is the show-icon not active).

| | | Search | Reset | Info: 1866 ro | ws found! | [| 3 |
|------|------|----------|---------------|---------------|---------------|-----------|---|
| Data | à | | | | | | |
| % | ID | Number | Name | State | Due-date | Supplier | |
| _1 | 443 | 0000000 | SUB3-SUBSTA | Rejected b | 2015/04/02 | YVelbTest | |
| 2 | 473 | 0000000 | SUB2-SUBSTA | Review pe | 2015/04/02 | YVelbTest | _ |
| 2 | | CLIDCTAN | CLID1 CLIDCTA | Deviewne | 201 5 /04 /07 | WalkTast | |
| | | | | | | F | |
| | Edit | Сор | y Delete | Show | Email-His | Send em | |

Figure 107: SEP - Search Results Area

- Email History: The whole communication (according to a request) will be storage in a separate window and is possible to reconstruct here.
- Send email: Sending of requests (manually). Shows all sent requests (See Figure 108).
- Accept: Here a sent declaration (supplier feedback) can be accepted (e.g. after evaluation). After this the data will be saved in the system.
- Reject: Rejection of incoming SEP-Requests (after rejection a separate email will be sent to the supplier)
- IPC1752: import von IPC1752 Declarations (outside of supplier portal e.g. if an adequate file has been sent via email))



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| C | Email-History | | | | | |
|---|------------------------|------------|---------------------------------|--|---------------|--|
| | | Mail sent | Sender | Subject | Receivers | |
| | 1 | 2013/10/22 | radhika.mohan@ipoint-systems.de | TesRequest [Nummer/Number: cfeick2Mixture] | info@stihl.co | |
| | 2 | 2013/10/22 | radhika.mohan@ipoint-systems.de | TesRequest [Nummer/Number: cfeick2Mixture] | info@stihl.c | |
| | • | | III | | ٨ | |
| | Show email text Cancel | | | | | |

Figure 108: SEP-search panel: archive of email communication

5.7.3 SEP – Supplier Request Creation

A SEP request, to the collection of compliance information from suppliers can be created:

- Manually in the SEP-Panel
- Direct from the tree structure (BOM/product tree)
- From your own ERP/PDM system (via special automated interface to iPCA)

5.7.3.1 SEP – Supplier Request Creation – SEP Panel

The SEP panel is available through the generally search window of SAM-M as a separate tab. A manually request creation in the SEP-Tab is shown in Figure 109.



| iPCA | SAM-M – User Manual | R13 |
|------|---------------------|-----|
| | 0000.0000 | |

| 🏶 Search | | | | | | |
|--|---------|---------|--|--|-----|---------------|
| VP Product model | Article | Mixture | Article / Mixture | Basic substances | SEP | REACH request |
| Supplier: Type of enquiry: Material type: State: Number: Name: ID: | All | | Reques Due da Declara Creator Creation | t-Date: te: tion Type: All : n date: | | |
| Search Reset Data X ID Number Name State Due-date Supplier Declaration type Creator CWD counter Type of enquir Edit Copy Delete Show Edit Copy | | | | | | |

Figure 109: SEP - Supplier Request Creation – SEP Panel

By clicking on the "Create" icon, a new window opens (see Figure 110). It contains of 3 tabs, which are "Data", "Documents" and "Substance Groups".

| Data Document | ts Rule Groups | |
|---|----------------------------|-------------|
| Part-No.: Name: Type of enquiry: Material type: Declaration Type: Supplier: Contact person: Email address: | Partial declaration | • • • |
| Email Text: Due date: | 2016/04/14 | |
| Contents: Process control: | Attach rulegroup documents | |
| Remark: Reject reason: | | |

Figure 110: SEP - Supplier Request Creation Mask



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Data

The following specifications are possible:

- Part No: Company internal part number (mandatory). *The term "part" is used here generally for articles and mixtures.
- Name: Name of the part
- Type of inquiry: Type of the part. An article or a mixture (optional) is possible
- Material type: When Mixture is chosen as type of inquiry, it is possible to choose between construction material and Semicomponent here.
- Declaration Type: Type of the declaration. Declarations types available are: full-, partial- and negative declaration. Additionally it is possible to upload a file (e.g. xml or cvs) (optional)
- Supplier: For the supplier setting, a new window opens by clicking on the "binoculars" icon. Here the according supplier needs to be selected (mandatory)
- Contact person: For setting the contact person, a new window opens by clicking on the "binoculars" icon. Here the according person needs to be selected (mandatory)
- Email address: Here the email address of the contact person will be displayed (after selecting and setting – see above)
- Email Text: The email text that is sent to the supplier when sending out the request, can be typed here, when clicking this icon: "pencil" See also Figure 111.
- It is also possible to choose the text from a pre-defined template, by clicking onto this icon: A new window will pop up where several templates can be saved and chosen.
- Due date: Date on which the response of the supplier is due by (mandatory)
- Contents: Tick
 - "Attach default documents" if you wish to attach the documents, that have been specified under Options > Parameter > SEP Parameter > E-mail default attachments.
 - "Add default contacts as CC recipients" if you want to send a copy of the request to all contacts defined under Options > Parameter > SEP Parameter > E-mail recipients (CC).
 - "Attach rulegroup documents" if information to the corresponding rulegroups should be sent.
- Remark: Open field to enter own remarks and messages for the supplier (optional)

The contents of the message/request can be edited using a text filed (which can be launched by clicking the "Edit" icon – (See Figure 111). With the "Generate" icon, the existing template for the message/request can be used (which is also editable). In both cases separate window opens are, which are to use as a text editor.



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| • | <u> </u> |
|---|-------------------------|
| Dear Supplier | |
| the following part information is requested | |
| Nummer / Number: | |
| Benennung / Name: | |
| Тур / Туре: | Zubereitung / Mixture |
| Deklarations Typ / Declaration Type: | Voll-Deklaration / Full |
| declaration | |
| Frist / Due date: 03-08-201 | 2 |
| | - |
| Please use our Supplier Portal at | |
| https://ipag.iciframe.ou/ | |
| https://pas.isiiraine.eu/ | |
| to provide the missing information. | |
| Departs | |
| Your iPoint Sustainability Team | |
| | |
| | |
| Ok | Cancel |

Figure 111: SEP - Create/edit a supplier request

Documents

The document flag allows to add other documents to the new entry

| O SEP - | - Add new entry | / | | | | | | X |
|---------|-----------------|---------------------|------------|-------------|--------------|---------------|------|-----------------|
| Data | Documents | Rule Groups | | | | | | |
| De | escription Free | text field / File I | Name / URL | Version no. | Version date | Document type | Name | Document format |

Figure 112: SEP – Documents flag

Rule Groups

The group rules flag helps to identify which compliance groups' information should be requested

| SEP - Add new entry | | | | | |
|---------------------------------|-----------|-------------|--|--|--|
| Data | Documents | Rule Groups | | | |
| RoHS (2011/65/EU) (Version: 12) | | | | | |
| SVHC complete part (Version: 6) | | | | | |

Figure 113: SEP – Rule Groups

5.7.3.2 SEP – Supplier Request Creation – Tree Structure

A SEP request, to the collection of compliance information from suppliers can be created directly from the product tree (by clicking right on the adequate node)



| iPC | 1 | SAM- | M – User Manual | R1 | .3 | |
|-------|---|---|----------------------------|---------------------|-------------------|--------|
| | | | | | | |
| 🖲 tes | st | | | | | - 🗆 💌 |
| ē i | 9 | A 🕲 🗄 🗶 🧔 | 🖌 🔹 🐬 😳 🔿 | 🛎 🖀 🔑 🦻 🌖 | 😂 (PC 🕖 | |
| ▼ te | ct | Options | Compliance Classif | ication & Labelling | GHS Classificatio | on & L |
| | ~{ ∅ ● ● | Cut Refresh Deactivate New version Copy | | ٩ | | |
| | 1 | Create SEP request | re no.: | test | IHS no.: | |
| | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | Expand tree Collapse tree Search | iixt. no.: ial type: | Construction Mate | erial | ===== |
| | 6 | Print Report MSDS | fication Elassification | | Name | |
| | | | | | | |

Figure 114: SEP - Supplier Request Creation – Tree Structure

5.7.3.3 SEP - IPC1752 - Import

The IPC - 175x standards enables the data format harmonization and data exchange for communication of material declarations within the supply chain. The standards IPC - 1751A and IPC - 1752A are important for the compilation of material declarations. Existing standards-based on XML files IPC1752 in version 1 and 2 can be imported into the iPCA. Standardized declarations (IPC1752) can be provided by supplier via supplier entry portal (SEP) or can be imported manually in the SEP-Panel in iPCA.

The manually import von IPC1752 – declarations will be used in case of resaving the data (outside of SEP) e.g. Per email or per download form a supplier homepage.



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| M Search | | | | |
|-----------------------|-------------------------|--|---|-------|
| Product (from SAP) P | roduct Homogeneous Mat. | Article / Mixture Raw materials | SEP REACH request | |
| Supplier: | | Request-Date: | | |
| Type of enquiry: | | ▼ Due date: | | |
| Material type: | | Declaration Type: | All | |
| State: | Sent | ✓ Creator: | | |
| Number: | | Creation date: | | |
| Name: | | | | _ |
| ID: | | | nport IPC1752 declaration | X |
| | | | | |
| | Search Reset | Info: 9 rows f | se choose the format and the file which is to be impo | rted. |
| Data | | File t | | |
| 🕺 ID Numbe | er Name State | Due-date Supplier Dec | | |
| 1 3 teste11 | 111 teste11111 Sent | 2012/04/20 testlv Neg | | |
| 2 22 testlv12 | 23 Sent | 2012/04/12 testlv Part | Start Cancel | |
| <u>3</u> 5859 MP001 | Test Sent | 2014/03/10 testlv Full | | |
| 4 5860 MP001 | Test MP Sent | 2014/03/10 testlv Partia deci | aration Clara Ramon(U | |
| <u>5</u> 5881 test_ms | 11 test_ms11 Sent | 2014/11/27 iPoinr systems Partial decl | aration marek 0 | |
| 6 5927 Intel.1.1 | 1000 Intel Intel F Sent | 2016/02/04 Dialog Semic Partial decl | aration Clara Ramon(0 | |
| 7 5902 Demo.2 | 2.10 Oberteil Ge Sent | 2016/01/28 Dialog Semic Partial decl | aration IMDS-Admin 0 | |
| • | III | | × × | |
| Edit Co | py Delete Sh | ow Email-History Send email | Accept Reject IPC1752 | |

Figure 115: SEP - IPC1752 - Import

5.7.3.4 Supplier Request Process Type Change

The process type change functionality of supplier requests enables to change the process type of supplier requests. At changing the process type of a supplier request the request will be set back to the status 'Sent' which initiates a possible supplier notification and credentials email to the supplier.

Note that the supplier requests can be changed only when they are in the following states: 'Sent', 'Received by Supplier', 'Viewed by Supplier', 'Edited by Supplier' or 'Rjected by QM'. It is possible to change multiple requests at the same time when selecting them in the list. If one or multiple requests could not be changed due to a not allowed state or other reasons, the user will be informed via a pop-up message (1, 2).

When changing the requests only certain transitions are allowed due to the saved supplier or manufacturer information at the request. Please see the table below for the allowed transitions.



| iPCA | SAM-M – User Manual |
|------|---------------------|
| | |

| From\To | Supplier Declaration / Default | Self-Declaration | Ext. IHS DB - Declaration |
|-----------------------------------|-----------------------------------|------------------|------------------------------|
| Supplier Declaration / Default | Allowed | Allowed | Not Allowed |
| Self-Declaration | Allowed | Allowed | Not Allowed |
| Ext. IHS DB - Declaration | Not Allowed | Allowed | Allowed |

R13

| \Lambda Sear | ch | | | | | | | | | | | | đ 🗙 |
|--------------|----------------------|-----------------------|----------------|-----------------|--------------------|-----------|--|------------------|------------|---------------------|-------------|------------|---------|
| VP | Product model | Article Mixtu | re Article / | Mixture Ba | asic substances | SEP | | | | | | | |
| | upplier: | | | | | | A Request | Date: | | | . | | |
| | | | | | | _ | Due dete | | | | 3 | | |
| iy iy | pe or enquiry. | | | | | - | Due date | · _ | A.H. | | ± - | | |
| Ma | aterial type: | | | | | _ | Declarati | on Type: | All | | | | |
| St | ate: | Sent | | | | • | Creator: | | | | | | |
| Nu | umber: | | | | | | Creation | date: | | | <u> </u> | | |
| Na | ame: | | | | | | Request | type: | All | | | | |
| ID: | | | | | | | Process | type: | All | | | | - |
| | | | | | | | | | | | | | Create |
| F | | ~ | | | | | | | | | | | |
| ⊂ Sea | Irch in Organization | Structure | | | | | | | | | | | |
| | | | Search | Reset | | | 1 | nfo: 80 rows fou | nd! | | | | |
| 8 | ID N | umber | Name | State | Process type | Reque | sted | Due-date | Supplier | Declaration type | CWD counter | Creator | |
| 1 | 1883 0 | 00000000000001463 | Material | Sent | IHS-Request | 2015/0 | 8/25 03:52:27 PI | 12015/09/08 | AVX Corp | | 0 | iPCA - SAP | JCO I 🔺 |
| 2 | 6423 0 | 00000000000001385 | ihs_auto_cmrt | Sent | IHS-Request | 2016/0 | 5/20 04:17:27 PI | 12016/05/20 | ST Micro | Partial declaration | 0 | iPCA - SAF | JCO I |
| 3 | 6422 | | | ~ · | | | ST IN THE REAL PROPERTY INTERNAL PRO | 16/05/20 | TE | Partial declaration | 0 | iPCA - SAP | JCO |
| 4 | 6443 • Cha | nge Request Pr | ocess Type | Test . | and desperate | - | _ | 016/05/24 | TE | Partial declaration | 0 | iPCA - SAF | JCO I |
| 5 | 6393 Please s | elect the desired Rec | uest Process T | vpe to which th | e selected request | ts should | be changed to. | 016/05/17 | TE | Partial declaration | 0 | iPCA - SAP | JCO |
| 6 | 6397 | Collination of the | | | | | 1 | 016/05/17 | TE | Partial declaration | 0 | iPCA - SAF | JCO I |
| 7 | 6442 | Self declarat | on | | | · · · · | | 016/05/24 | TE | Partial declaration | 0 | iPCA - SAF | JCO |
| 8 | 6395 | | 4 | | 0 | | | 016/05/17 | TE | Partial declaration | 0 | IPCA - SAF | JCO I |
| 9 | 6396 | | Арріу | | Cancel | | | 016/05/17 | TE | Partial declaration | 0 | iPCA - SAF | JCO I 🗢 |
| | - | | | | | _ | | | | | | | • |
| | Edit | Conv | De | lete | Show | Emai | il-History | Send email | Change Pro | cess Type | cept | Reject | |
| | Lui | Copy | | | 01017 | Lina | | oono ondi | Change Tro | 0000 ()po | | riojoot | |
| | | | | | | | | | | | | | |
| | | | | | | | | | | | | | |

Figure 116 - Supplier Request Process Type Change

5.7.4 SEP - Administrative system settings

5.7.4.1 SEP - Standard parameter for supplier requests

The standard settings of an email request (like subject, header, footer etc.) can be set in advance. There is important for the emails that are sent automatically by the system. If these parameters will be not preset is a creation of a request in SEP not possible.

The input mask is available through the menu "Options" in the main SEM-M menu (see Figure 117). Additionally a request text can be predefined (in different languages) under "text templates".





Figure 117: SEP - Standard parameter for supplier requests

This will open a new window where the following parameters can be pre-set (See Figure 118).

- Email sender: The standard sender address. All outgoing requests use this email address as the sender
- Email subject: Title/subject line of the emails
- Email header: The standard salutation of the emails
- Email footer: The standard footer-formula of the emails.
- Dunning Header: The standard salutation of the first dunning (reminder). Dunning mails will be sent periodically as a separate message
- Number of days for due date: Pre-setting of the standard deadline for the supplier feedback (in days)
- Email Reminder Period: Number of days until the automatic release for the next dunning (starting from the day the first dunning was made for missing requests)
- Escalation: Setting for an escalation by dunning. Escalations are used internally to inform (e.g. the purchasing) about the hold-up by the supplier
- Escalation Trigger: Number of sent dunning, when an escalation is sent.
- Escalation Header: The standard salutation of escalations.
- Escalation receiver: The responsible person who should be informed about the reminder at the same time.



| 🖸 SEP Para | meter | | | | | - 0 | × |
|------------|---------------|-----------|---------------|--------|----------------------|--------------|---|
| General | Account | E-mail ı | ecipients (| (CC) | E-mail default att | achments | |
| Email Sen | der: | | demo@localhos | | | | Â |
| Email Sub | ject: | | Request f | or cor | nponent declaratio | n | |
| Email Hea | ader: | | test | | | | |
| Email Foo | ter: | | test | | | | = |
| Dunning I | Header: | | test | | | | |
| Number o | of days for o | lue date: | 10 | (due | e date = creation da | ate + x days |) |
| Email Ren | ninder Perio | od: | 10 | days | | | |
| Escalation | n: | | | | | | |
| Escalation | n Trigger: | | 2 | . Du | nning Email | | |
| Escalation | n Header: | | test dunn | ina m | ail for testing o | nlv▶ | - |
| | | | Save | Clo | ose | | |

Figure 118: SEP - Standard parameter for supplier requests - Pre-setting window

5.7.4.2 SEP - Creation of SEP-logging for supplier

The user login data for SEP will be defined in SAM-M in the area "Companies / legal units / contacts" (See Figure).

After starting of the function "Companies/Legal units/Partners" a search window, where you can search and edit the filter parameter for different search results for the saved company data, will be opened. If the required Supplier or Customer is found and marked by clicking the "Edit" icon a new window can be open. Here the relevant supplier detail data can be applied or edit (see Figure 119).



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| Name: | Compa | ny-/OrgUnil- | ID: | Com only | npanies ' | Risk asses | sment: | | • |
|--------------------------|---------------------|--------------|-------|-------------|--------------|------------------------|------------|----------|------------|
| Org.unit: | DUNS | Number: | | | | Type: | | | - |
| ZIP code / City: Contact | | t Person: | | | | Supplier/Customer Code | | le: | |
| Country: | | | | | | - | | | |
| | Search Reset |] | | Into: 1 | .084 rows | tound! | | | |
| Data | | | | | | | | | |
| 🕺 Company | Org. Unit Name | Org. Unit Id | Zip | City | Country | DUNS NO. | Supplier/C | Risk Kir | nd of org. |
| 1 00 Lieferant 001 | 00 Lieferant 001 | -10073 | 12345 | BRD | DE | | 000000191 | IHS | Company 🔺 |
| 200 Lieferant 001 | 00 Lieferant 001 | -8/22 | 12345 | BRD | DL | | 0000000021 | 1115 | Company 📃 |
| 3 00 Lieferant 001 | 00 Lieferant 001 | -8806 | 12345 | BRD | DE | | 000000035 | IHS | Company |
| 00 Lieferant 001 | 00 Lieferant 001 | -10083 | 12345 | BRD | DE | | 0000000192 | IHS | Company |
| 5 00 Lieferant 001 | 00 Lieferant 001 | -8802 | 12345 | BRD | DE | | 000000033 | TUS | Company |
| 6 00 Lieferant 001 | 00 Lieferant 001 | -8538 | 12345 | BRD | DE | | 0000100733 | IHS | Company |
| _/_00 Lieferant 001 | 00 Lieferant 001 | -8536 | 12345 | BRD | DE | | 0000100732 | IHS | Company |
| 8 00 Lieferant 001 | 00 Lieferant 001 | 8542 | 12345 | BRD | DE | | 0000100735 | IHS | Company |
| 9 100 sublier002 | 100 subplier002 001 | -8/64 | 12345 | BRD | DE | | 000000028 | IHS | Company |
| | | | | _ | | | | | P |

Figure 119: SEP - Master Data Management - Companies /Legal units /Contacts - Search

The contact person by a supplier can get a SEP-entry if the user name is in the contact data defined (see Figure 120). That name will be used for logging in SEP.

| co | mpany data C | Organisation unit Contac | ts | | | |
|----|---|-----------------------------------|-------------|-----------|--------|-----------------------------|
| Co | ntact Person | | 1 | relephone | e No.: | Search Reset |
| • | Name 1 00 Lieferant | Username 001. RADHIKA.MOHAN 88 | Phone C3 | Fax | Email | Department Mailbox IMDS typ |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| 3 | Firstnamo | | | | | |
| | Firstname. | | | | | |
| | Lastname: | 00_Lieferant_001 | | | | |
| | Lastname: Telephone No.: | 00_Lieferant_001 | | | | |
| | Lastname: Telephone No.: Fax No.: | 00_Lieferant_001 | | | | |
| | Firstname: Lastname: Telephone No.: Fax No.: Email | 00_Lieferant_001 | | | | |
| | Lastname: Telephone No.: Fax No.: Email Department: | 00_Lieferant_001 | | | | |
| | Lastname: Telephone No.: Fax No.: Email Department: Mailbox: | 00_Lieferant_001 | | | | |

Figure 120: SEP - Master Data Management - User Name definition

Note:

The definition of the user name for each contact person (by supplier) is necessary to activate the access to SEP. If designated one user name can be used for different user by a supplier. The corresponding password must be assigned by the system administrator (for more information please see the separate manual for User Management).



It is recommended to send the user login data in two separate mails (to the corresponding contact person): one for user name and on for password.

5.7.4.3 SEP - Creation of declaration lists

A declaration list summarizes all substances considered by a relevant regulation (restricted, prohibited etc.). Thus specific queries are possible for dangerous materials regulated by RoHS, PFOS or the SVHC-candidate list.

In SEP the supplier is asked to make a statement about substances (and substance groups) using the declaration list. That means, in SEP it is mandatory to declare each listed substance whether the substance is included in the requested part or not. If yes, the supplier will be asked to declare the appropriate amount/weight and the corresponding unit. (More information can be find in the separate "SEP – Supplier Entry Portal Manual", chapter 2.6.2).

Each defined substance group has to be activated in SAM-M. That means these groups have to be defined as "Compliance" type in the CSI-Management module. (Guidance of how to create a substance group is available in the separate "iPCA/CSI Compliance Substance Inspector" manual, chapter 4.3).

First step to define the "Compliance"-type for a substance group begins by starting the CSI-Management tool (see Figure 121).

| • iPoint Compliance A | gent |
|------------------------|-----------------------------|
| File Edit Data Option: | Extras Window Help |
| 8 🗋 🗐 🥒 🦉 🛷 | Management |
| * | CSI Management |
| | DB-Job Manager |
| | Master data |
| | Memory Monitor Ctrl+Shift+D |

Figure 121: SEP - Start of the CSI-Management module

See chapter 5.3.13 for more information about the CSI-Management module.

5.7.5 SEP – Evaluation of incoming Data

The evaluation of incoming data (supplier declaration) will be made in the SEP-Panel in iPCA:

- Select request to "Released by Supplier" (1)
- Chose first request (2)
- Open and evaluate the content (3)
- Accept request (4) or optionally reject



| 😣 Search | | | | | | |
|--------------------|---------------------------|-------------------------------|---------------|---------------------|---------------------|------------|
| Product (from SAP) | Product Homogeneous Mat. | Article / Mixture Raw | materials SEP | REACH request | | |
| Supplier: | | Request- | Date: | | - | |
| Type of enquiry: | | Due date | : [| | - | |
| Material type: | | Declarati | on Type: 🛛 | All | | • |
| State: | Released by Supplier | Creator: | | | | |
| Number: | | Creation | date: | | - | |
| Name: | | | | | | |
| ID: | | | | | | Create |
| Data | Search Reset | 2 Info | 2 rows found! | | | |
| ID Numbe | er Name | State | Due-date S | Supplier | Declaration type | Creator |
| 1 5913 000000 | 000000000578 MAREK7_Mate | erial3 Released by Supplier | 2016/01/29 N | AREK7_Lieferant1 F | Partial declaration | iPCA - SAF |
| 2 5914 000000 | 1000000000579 MAREK7 Mate | erial4 Released by Supplier | 2016/01/29 N | MAREK7_Lieferant1 F | Partial declaration | iPCA - SAF |
| | | | | 4 | | |
| | | | | | | 4 |
| Edit | Copy Delete | Show Email-History | Send email | Accept F | Reject IPC17 | 752 |

Figure 122: SEP – Evaluation of incoming Data



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7 Change History

| Version | Date | Description |
|---------|------------|---|
| 11.00 | 06/16/2016 | Complete rework of the user manual |
| 13.00 | 08/10/2018 | Revising all screenshots and adding new functions |
| | | |
| | | |
| | | |