iPCA/SCM/USC

Usermanual

Imprint

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1 Introduction

The application is implemented as a web application and need no local installation on the client machine.

The user interface is similar to the central EDS System, in order to be able to offer a standardized handling of both systems to the user.

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

For the basic concepts and terms is an IMDS help file available which explains the basic procedures and ideas/concepts. This user manual refers to the iPoint-Inhouse-System and explains the add-ons.

2   New Functions

Version 9.04
- Possibility to add predefined reject reasons to an USC/SCM rejection eMail
- Possibility to define org. unit specific USC check configurations

Version 9.0
- Specify additional recipients for an USC/SCM rejection eMail

Version 7.22
- CSI check results from USC check in received search result list (optional) – see chapter 7.2.1

Version 7.14
- Multiple editing of entries in the ToDo list

Version 7.0
- Company specific check of recipient data

Version 6.0
- Signature function within IHS
  See chapter 6.2 starting on page 20
- Provide reason of denial within MDS
  See chapter 6.3 starting on page 23
- USC functions
  See chapter 7 starting on page 24

Version 5.3
- New language selection when logging in
  See new chapter 5.1 "Logon" starting on page 13.

Version 5.1
- Added documentation SCM status
  See chapter 3.3 "Status inside the Inhouse-System and inside the IMDS" starting on page 7.
- Optional email (optional)
  See chapter 6.2 "Received MDS" starting on page 20.

Version 4
- Complete new user management
  See own documentation
- Search with enhanced search criteria
  See chapter 5.2 „*MDS Search*" starting on page 14.
- The recommendation checks are extended for Rec. 003 and Rec. 012.
  For details please refer to the checker documentation.
- Extension of materials for int. number
  Note: for a better differentiation, the name of the already existing int. number was changed to "IHS number"
- Extension DUNS number for companies and organization units
- Extension of the Q-Checker for recipient specific checks of the supplier number
  See own documentation

3   Basic Terms

3.1   Structure tree

Ingredients and structure tree
In a material data sheet are all ingredients of a product listed which could be contained in a saleable product. In order to ensure an explicit display of the structure the system uses a tree view the so called "product structure tree": a product consists of 1 – many subsidiary objects which could again consists of subsidiary objects. Thus a multilevel, hierarchical structure tree is built in which all sub products are listed. This structure tree displays all of which a complex product consists of.

Node
A node is an item in the structure tree regardless the node's or structure type or in which hierarchical level the node is positioned.

A product can include a large number of nodes.

How the structure tree needs to be created sectorally please refer to the recommendations on the EDS-Web site

If the symbol of nodes in the product structure tree have a black dot this means that this MDS or module is referenced. You can search for this module/Material Data Sheet using the summary lists.

More terms are explained in the Glossary (see chapter 9 "Glossary" starting on page 33).

3.2   IMDS-ID and IMDS-Version inside the IMDS

Every Material Data Sheet / Module is identified by a unique identifier. This is the combination of the IMDS-ID and the Version e.g. 765428 / 1.00

Is the Material Data Sheet / Module newly created it receives the Version 0.01.
Should the Material Data Sheet / Module not be changed anymore the Material Data Sheet is released internally and it receives the next following up integer (e.g. 0.01 ➔ 1.00, 3.02 ➔ 4.00).

Shall a copy of a MDS/module be created but with the same IMDS-ID a new version needs to be created: IMDS counts 0.01 to the current valid IMDS-ID (e.g. 1.00 ➔ 1.01, 4.00 ➔ 4.01, 0.01 ➔ 0.02). Thus you receive a new combination like `765428 / 1.01`.

Inside the IMDS a new identification is given internally (the so called "node-ID", which is greater than the previous IMDS-ID). When handling the new MDS/module the previous IMDS-ID is still used. This means for the version smaller or even 1.00 the IMDS-ID and node-ID are (mostly) the same. For all later versions the IMDS-ID and node-ID are always different.

This versioning is to document the lifecycle of a MDS/module.
When creating a new version of a MDS/module in iPCA/HIS, this new MDS/module will get the Imds-ID xxx/999.01. The version level 999.01 is representing a new version to an existing MDS/module which is not yet sent to external IMDS system. After this new version has been transferred to IMDS it will get it's "final" version (e.g. 1234/2.05).

3.3 Status inside the Inhouse-System and inside the IMDS

Because of the local data edit and the local data management it is necessary to manage more status for the Inhouse-System as available in the IMDS.

Imds status
This is the edit status of a MDS/module inside IMDS and is exclusively assigned and changed by IMDS.

- Edit mode
  The MDS/module can still be changed by the users of the same organizational unit.
  The version-no. is not an integer (e.g. 0.01, 3.02).
- Internally release
  The MDS/module is completed in its process of treatment and therefore can not be changed anymore.
  Are there changes which have to be done a new version of the MDS / Module needs to be created. The
  version-no. is an integer (e.g. 1.00). Only internal released MDS/modules can be used in other MDS which
  should be sent or published.
- Published
  A status for a MDS. The MDS is completed in its edit, can not be edited any longer and is published to the
  public. This means any IMDS user has the right to look up this MDS and to use it in its own MDS/modules.
  The version-no. is an integer (e.g. 1.00).
- Handshake
  The MDS has been sent to a customer with the status 'edit mode' and has not already been accepted or
  rejected. This MDS can not be edited. Does the customer accept the MDS it will be released internally.
  The versions-no. will then be upgraded to an integer. Will the MDS be rejected the MDS will get back to
  the status 'edit mode', the version-no. stays the same.

Recipient / sender status
This is the status of a MDS which has been sent to a customer or which a supplier has received. This status is
administered per single recipient.

- Edit mode
  The MDS has not been sent to a customer yet.
- Unread
  The MDS has been sent or received but has not been read by the recipient yet.
- Read
  The recipient has read the MDS at least once.
- Accepted
  The MDS has been accepted.
- Rejected
  The MDS has been rejected.
- Modified
  The MDS has been rejected but has been edited in the meantime
- Cancelled by sender
  The MDS has been deleted by the sender and could not be used anymore
- In process at the recipient
  The MDS is in process at the recipient
- New in IHS
  A recipient was added to a MDS which already had a recipient and the MDS was not yet sent to this
  recipient.

Module status
A status for the Inhouse-system for the process situation of a MDS/module inside the Inhouse-System which can be set or reset by authorized users:

- In process
  The MDS/module is editable and can be changed
- Ready
  The MDS/module is fully applied and without any errors. It will be blocked for further processing and it is not allowed to do any changes.

Transmission status
A temporary status inside the Inhouse-System to control which data record should be transferred to the IMDS and with what kind of action. The status must be set manually by the user.

- Empty: Transmitting status is not set
- Upload: Setting the transmitting status
  To create a new MDS/module if it should not be internally released immediately or send e.g. for just getting an IMDS-ID for the correspondence
- Intern: Released internally
  The MDS/module should be internally released (versions no. will get an integer)
- Send: Sending the MDS
  Sending the MDS to a specific recipient
- Prop.: Propose MDS
  Sending to more than one recipient. At the same time the MDS will be released internally.
- Acc.: Acceptance
  Accept a received MDS
- Rej.: Rejecting
  Reject a received MDS

After the transmission the status is resetted so that a MDS/module has this status only between the manually set and the automatic transmission to IMDS.

SCM status
The SCM status is visualizing, whether a received MDS has passed the recommendation check the day it was downloaded.

Following symbols are available for the SCM status:

Symbols	Meaning
	When the MDS was checked, violations against the checked rules were found. A suggestion for the reason for denial was created.
	When checking he MDS no violations were found.
	When the MDS was downloaded, it was already accepted, rejected or cancelled by sender so that no check was needed.
	The MDS is schedules to be checked. This is a temporarily status between the download and the check done by the system.

3.4 Miscellaneous

IMDS
In this documentation IMDS means the web application in the Internet and the data management that comes with it.

IMDS company structure
Every company which works with IMDS needs to be registered there. It contains at least one organizational unit with a unique organizational-ID.

Additional organizational units can be added to this 'head company' (e.g. locations, plants) and therefore receive also an own IMDS-organizational-unit-ID for them.

IMDS users are also created by IMDS client manager and can be allocated to different organizational units and also to the 'head company'.

Contact persons are always valid for the whole company. These must be created by the IMDS client manager as well.
These configurations have to be done online in the IMDS and are downloaded into the inhouse system by the download functionality.

In the Inhouse-System this organizational structure is displayed as well. And each user of the Inhouse- system is assigned to a specific IMDS-organizational unit.
MDS/modules can be changed by those users who have the same organizational unit ID as the person who created the MDS/module.
MDS/modules can be used by all users and can be integrated into their own MDS/module which belong to the same company. This means organizational units of a company have access to data of other organizational units of the same company.
Depending on the access rights a user is able to accept/reject all external MDS which have been sent to any organizational unit he is assigned to in the company.
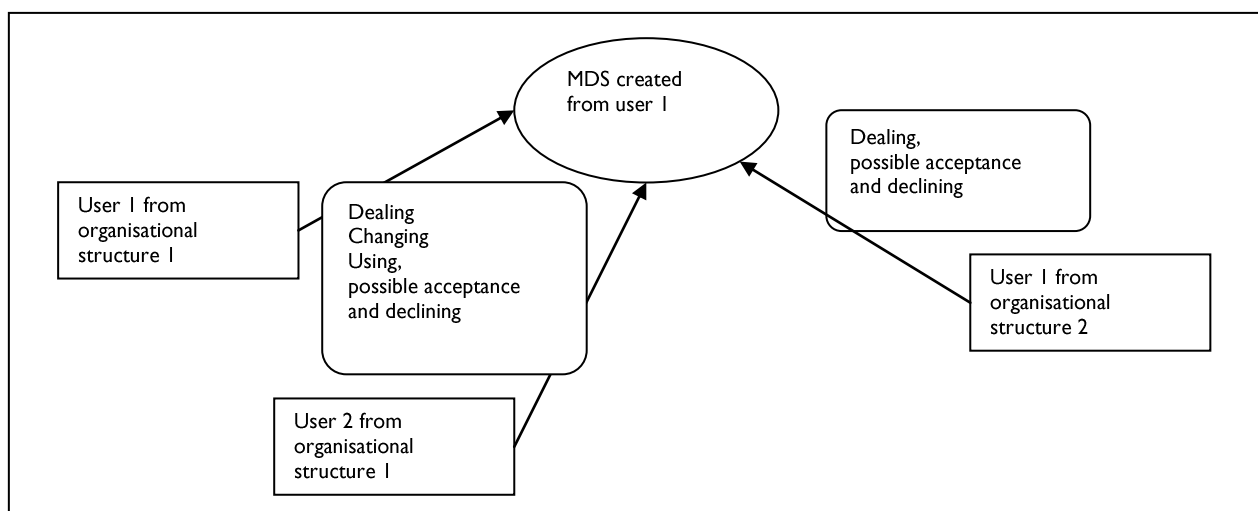
Figure 1: Editing within Organization Units

External MDS
An external MDS is a MDS which has not been created from an organizational unit belonging to the own "head company". It is a MDS which has been made public or it is a supplier MDS which has been received as a MDS and downloaded in the Inhouse-system.

4 General Information

4.1 Usage

The application iMDS is a internet/intranet application. The user interface is as much as possible like any other windows application.

4.2 Highlighting

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

4.2.1 Basic Substances

- Font color orange for substances copper (0 - 0.3 %)
  The substance is duty to declare.
- Font color red for basic substances Asbestos (0 %)
  The substance is forbidden.
- Font color pink for basic substances lead (0 %)
  The substance is duty to declare and forbidden.
- Background color grey zinc (30 %) ,
  The substance marked as deleted in IMDS.

4.2.2 Missing Positions

Definition:
A missing position is a component/semi component/material which was not found during the load of a BoM (CSV, PDM/ERP/SAP interface). A missing position is therefore documenting a missing MDS/module. A missing position will always been shown as a component.

- Font color red for simple component nodes NONEXISTENT: DISPLAY
  It represents a component, semi component/material which was not found during the load process.
- Font color red with yellow background for simple component nodes NICHT VORHANDEN: UNGELESEN-TEIL
  It represents a component, semi component/material which was found during the load process, but in the state rejected, unread or read.

4.3 Old Versions

- The blue arrow in the symbol of a component/semi component or material (, ,) shows, that there is a later version available fort his MDS/module.

4.4 MDS/modules which are not allowed to use

- Background color grey zinc (30 %) , 035 BHK (Synonym: 035 BHF, 035 BHO, 240 E
  The substance or MDS/module is marked as deleted in IMDS or it is a MDS which was cancelled by the sender.

4.5 Support

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

This administrator will check and answer your enquiry
If your in-house administrator can not solve the problem, he will contact iPoint systems gmbh to get a solution for it.
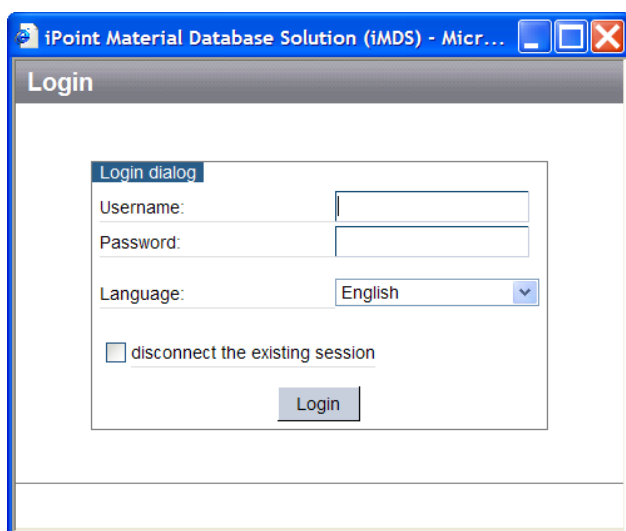
It is important that only the in-house administrator contacts iPoint systems gmbh as this is the only way to get a fast response and to avoid to do the work twice.

5 Checking of MDS

5.1 Logon

To start the application please use the link provided by your administrator (e.g. http://servername/IMDS-Client/start.html).

The logon panel will open.

Figure 2: Logon panel

Please enter your userid and password and then click on "Logon".
When needed the language of the application can be selected.
If there is the message in the status line at the very bottom "user already logged on" please select the option "disconnect the existing session". Check the correct username before!
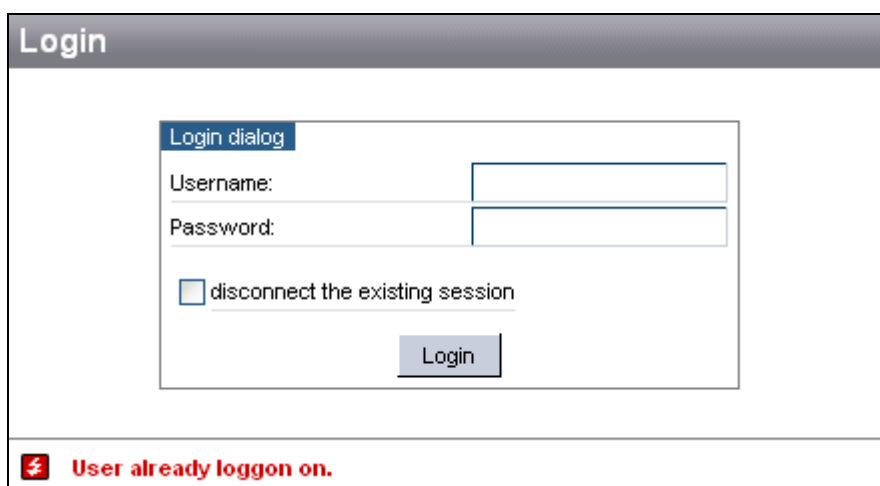
Figure 3: Logon message "User already logged on"

After logon, the standard iPCA/LM search panel will open.

5.2 MDS Search

The search is type independent.
Only received MDS can be searched.

Figure 4: SCM search panel

Following search criteria can be combined:

- Name:
  name of the MDS to be searched for
- Part-/Item-/material-No.:
  The part-, item- or material number of the MDS to be searched for.
- ID-no.
  The IMDS-ID which was assigned in the IMDS when creating a MDS/module.
  IMDS Node-ID
  The IMDS NodeID which was assigned in the IMDS when creating an object.
- Contac person
  name of the contact of an MDS.(the kind of name is as received from IMDS)
- Status
  The status of the MDS to be searched for:
  - "empty"
    The search will find all received MDS
  - Open MDS
    Only MDS will be searched which have not the state "accepted", "rejected" or "cancelled by sender".
  - Not seen
    Only MDS will be search which are unread
  - Seen
    Only MDS will be search, which have been seen previously.
  - Accepted
    Only MDS will be searched, which have previously been accepted.
  - Rejected
    Only MDS will be searched, which have previously been rejected.
- Org.unit:
  name of the organization unit to which the MDS was sent (empty = all)

- Suppl./Org.unit
- name of the organization unit from which the MDS was sent (empty = all)
- date from:
  date, from which MDS should be searched (empty = all)
  selecting the arrow right of the entry field will open a calendar for selecting a date.
- date to:
  date, to which MDS should be searched (empty = all)
  selecting the arrow right of the entry field will open a calendar for selecting a date.

After entering the search criteria the search itself is started by pressing the 'search' button.

If the search is successful the found data records are displayed in the table in the lower part of the window. Each row represents a MDS of the Inhouse-System.
In the lower right corner the amount of found records is displayed.

The columns meanings:
Column Name
This is the name which has been assigned when the component/semicomponent/material has been created.

Column Part-/Item-/Material-No..
The parts or material no. which is available at IMDS.

Column IMDS_Id
The IMDS-ID of the MDS.

Column Type
The type of the MDB: component, semicomponent or material

Column Transmitted
The date, the MDS was sent to your company.

Column From Company
The name of the organization unit of the company which has created the MDS.

Column IMDS_State
The IMDS state of the MDS. Details about this state can be found in chapter 3.3 "Status inside the Inhouse-System and inside the IMDS" starting on page 7.

Column SCM_State
The SCM state of the MDS. Details about this state can be found in chapter 3.3 "Status inside the Inhouse-System and inside the IMDS" starting on page 7.

Column Editor
The name of the user who has accepted or rejected the MDS (if done in the SCM application)

Column Upload state
When the MDS was accepted or rejected, but this status was not yet uploaded to IMDS, the state will be displayed, which shall be transmitted to IMDS.

Column Edited
Last change date

5.2.1 Actions at the search result list

Load:
      The details view will open showing the complete MDS with all related information.
      Please refer to chapter 5.3 Detail View starting at page 17.

Accept:
      By pressing the accept button you can do an acceptance for the selected MDS. Before the acceptance is
      set a confirmation must be done.

Reject:
      By pressing the reject button you can do a rejection for the selected MDS. Before the acceptance is set a
      confirmation must be done. If no reason for denial was entered, an error message will raise and this status
      can not be set.

Reason for Denial:
      The details view will open showing the reason for denial on the right side of the screen and for the
      rejection email. More information please refer to chapter 5.4 "Editing the reason for denial" starting on
      page 19.

:   The actual result list will be exported as a PDF document and can be saved.

:   The actual result list will be exported as an Excel document and can be saved.

5.3   Detail View

In the detail view you find all information related to the MDS.
By selecting a node on the left side the related node information will be display on the right side.
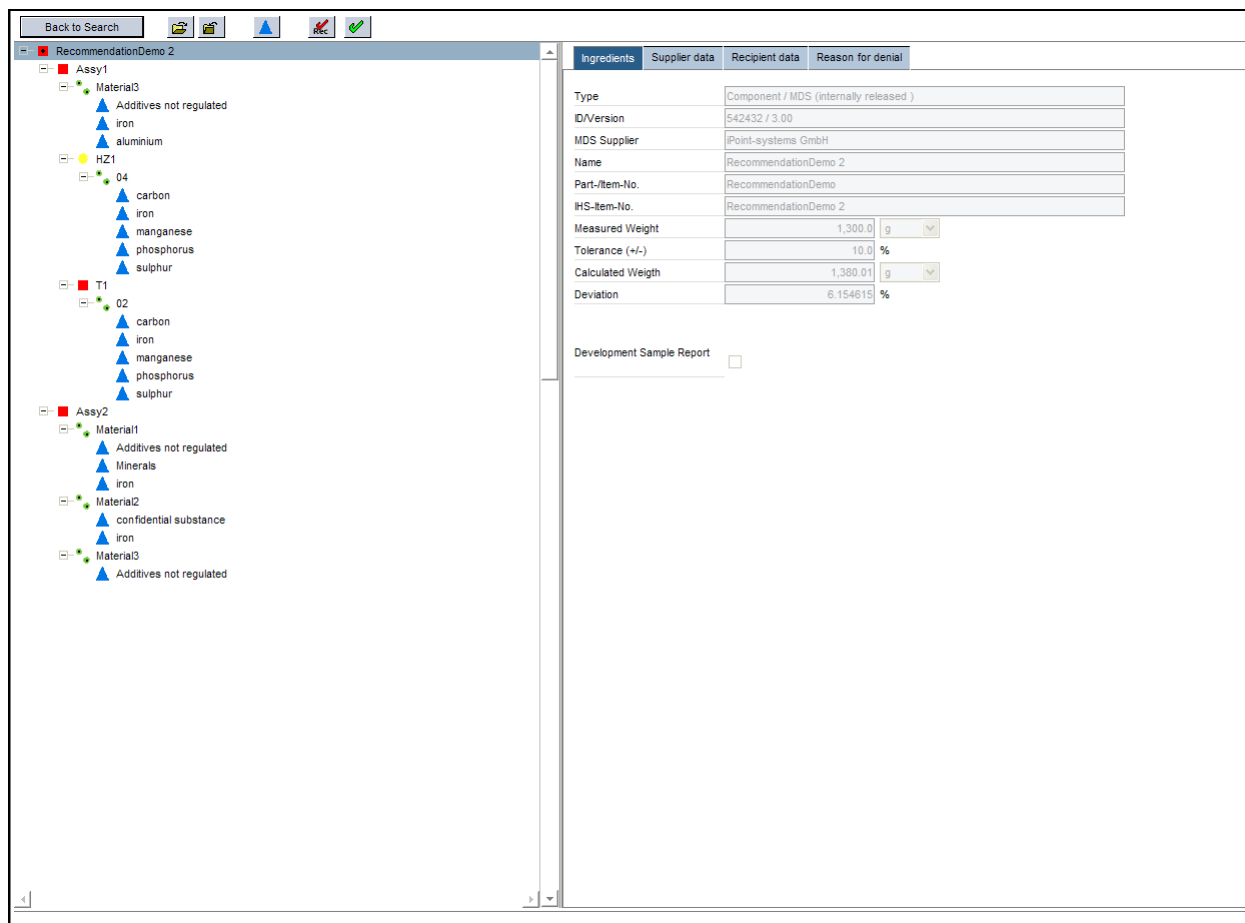
Figure 5: Detail view

5.3.1 Actions from the Details View

Back to search:
The details view will be closed, the search panel will open.

:   The tree of the BoM will be opened starting from the selected node

:   The tree of the BoM will be closed starting from the selected node

:   The basic substances will be hided. The icon changes to

:   The basic substances will be blend in. The icon will change to

Rec : The MDS will be checked whether it meets the recommendations.
           If errors were found, they will be displayed in the following window.
           The kinds of checks are documented in a separate documentation.

Figure 6: Messages from the recommendation checker

: The MDS will be checked for it's quality. If there are any problems found,
   they will be shown together with their level „error", „warning" or „information".
   The kinds of checks are documented in a separate documentation.

Figure 7: Messages from quality checker

5.4 Editing the reason for denial

When pressing „reason for denial", the corresponding tab will open (this tab can also be opened from the details view by selecting the tab „reason for denial".
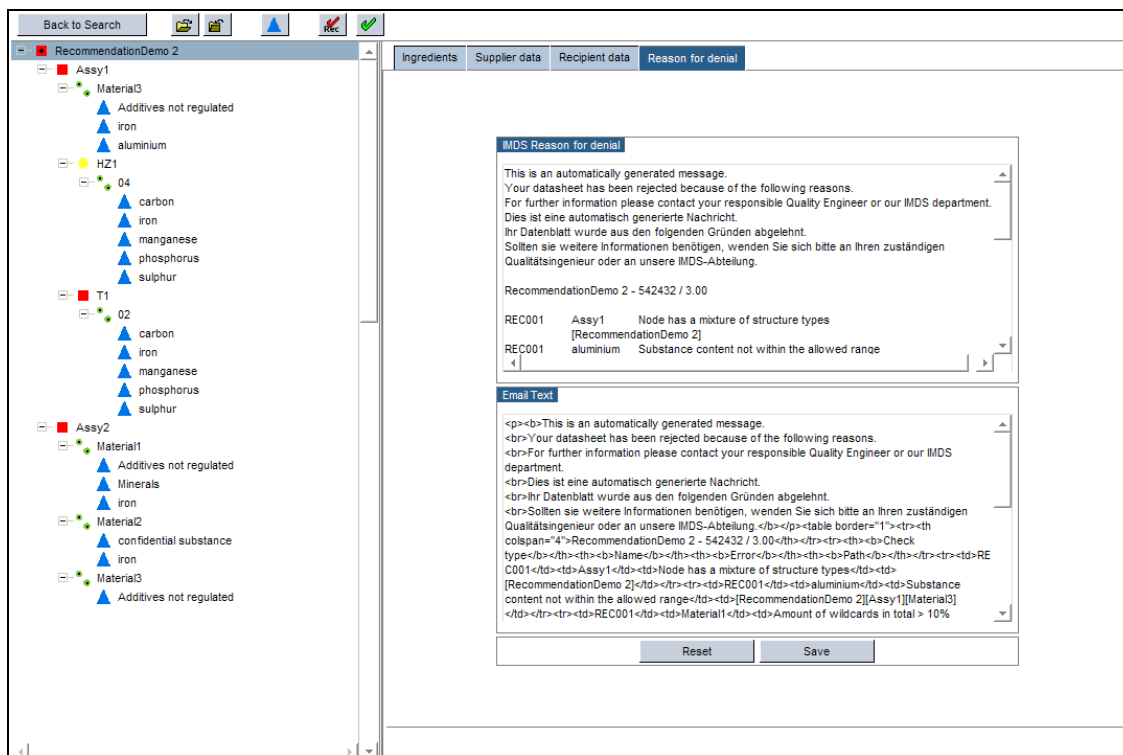
Figure 8: Editing reason for denial

The reason for denial as also the mail message can be edited here.

Available actions:

Reset:
Remove the changes since the last save.

Save:
Save the current text.

6   SCM functions within iPCA/IHS

6.1   General

If iPCA/IHS is licensed additionally to iPCA/SCM, these functions are also available for users which use the iPCA/IHS. The overall functionality is the same, nevertheless subtle differences exist in the usage.
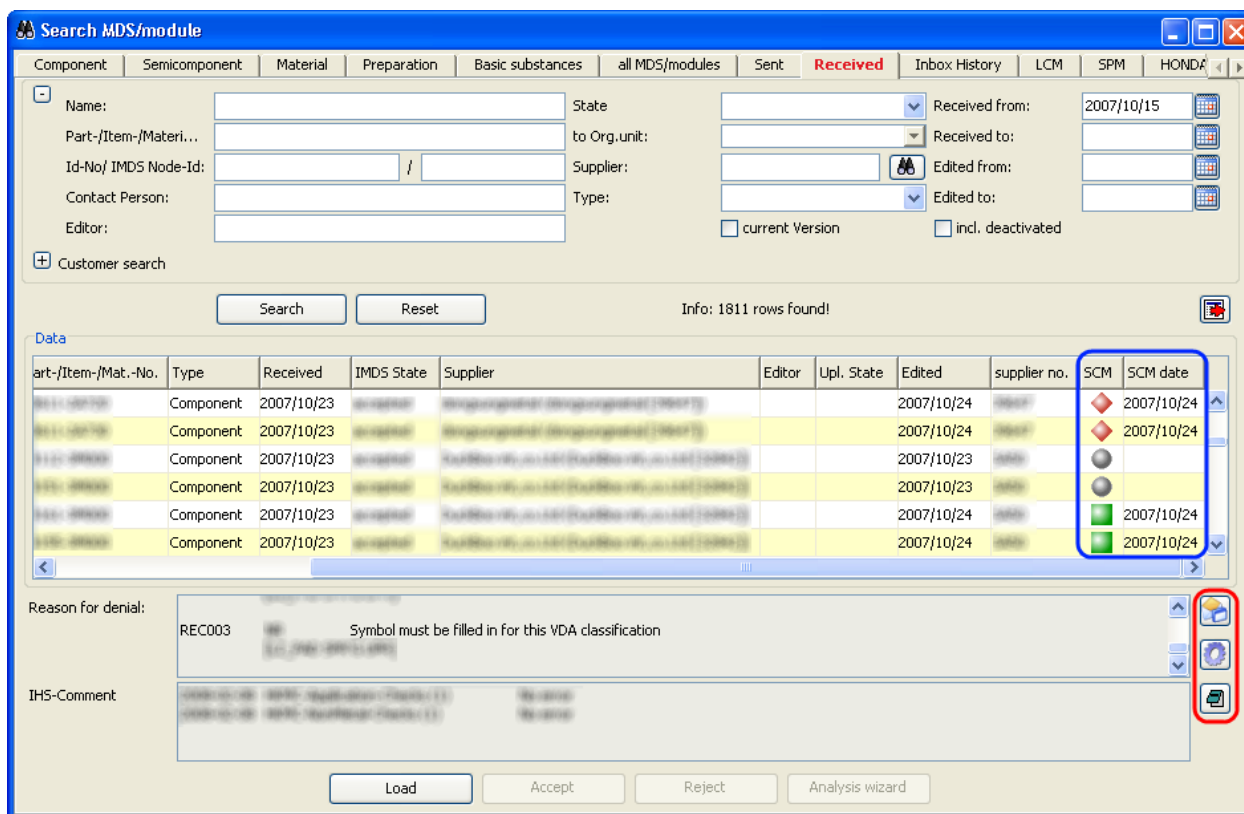
The SCM check is performed once daily after the daily download has finished (usually between 5:00 and 6:00 am CET).

Which checks to perform can be configured in the check configuration "SCM/USC Inbox Check". For more details please refer to the separate documentation. All changes of the configuration are only valid for future checks – current data remains unchanged. The configuration is valid for all users and only users having the right ADMIN_CHECK_CONFIG are allowed to change the configuration.

The SCM check automatically fills the reason of denial and the email text with the found errors. A user can add the errors as well which he finds during a manual check.

6.2   Received MDS

The following SCM functions are available within iPCA/IHS:

Figure 9: SCM functions in iPCA/IHS

Extended result list (blue area)
The columns SCM (state) and SCM date are available like in the web client. The different states are described in the section "SCM state" in chapter 3.3.
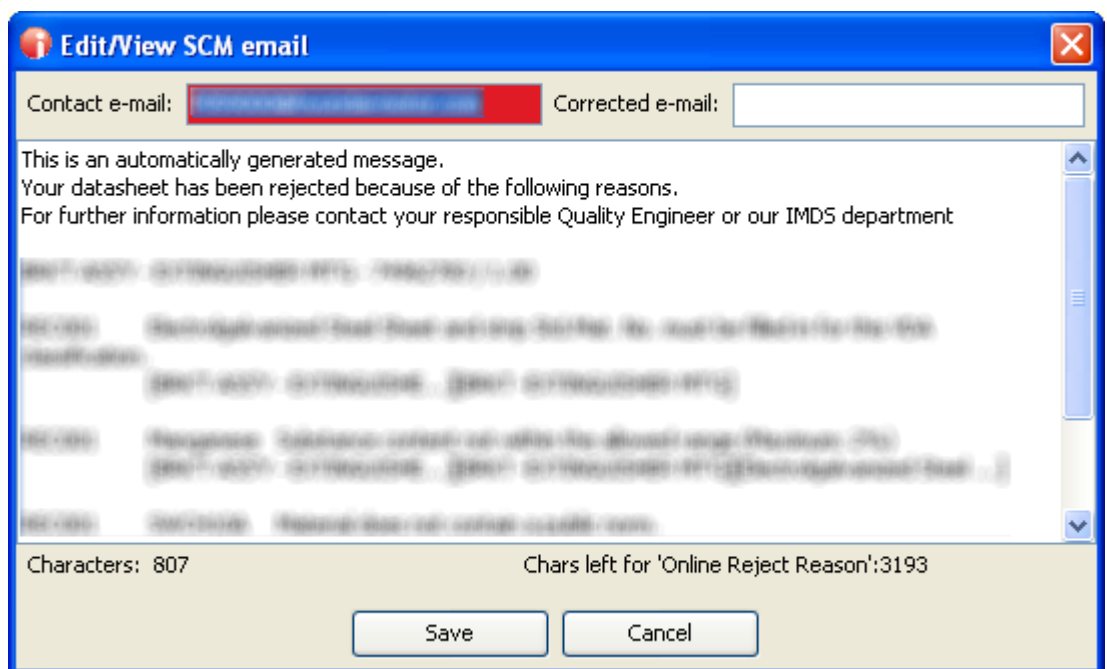
Reason of denial and SCM email (red area)

A window for editing the reason of denial and the SCM email is opened after pressing the button "Edit SCM email"   .

The following information/actions are available/possible:

- The IMDS contact email of the contact person for the MDS as stored in IMDS. If this email address is faulty, a corrected address can be entered into the field "corrected email". The SCM email is sent to the corrected email address if provided, otherwise the IMDS contact email is used
- Additional recipients for the SCM Email
  To send the email to other persons more recipient email addresses can be added by this field, delimited by semicolon. These recipients will be added as recipient to the email address above.
- Input box for the reason of denial/for the email text. This box is filled automatically during the inbox check with the found errors. The text can be extended and/or corrected in this box.
  It is possible to provide a long text which is then sent as email if configured (see SCM options below).
  Only the first 4000 characters of the provided text are transferred as reason of denial into the online IMDS system. How many characters are left to 4000 is shown at the lower right side of the window. If the text length exceeds 4000 characters the button "Mark Online Reject Reason" is shown to mark all characters which will be part of the reason of denial (first 4000).


Figure 10: Editing SCM email text in iPCA/IHS

- By pressing 'Save" the provided text is saved as reason of denial (first 4000 characters) and as email text and the window is closed
- If cancel is pressed the window is closed without saving any data

If an MDS has been accepted or rejected already, these functions are only available for viewing – the icon   is shown.

SCM options (red area)
Further configuration about sending SCM emails can be made by pressing the button "SCM options". This window is also shown when rejecting.
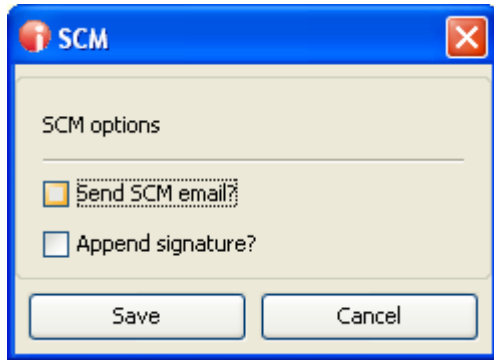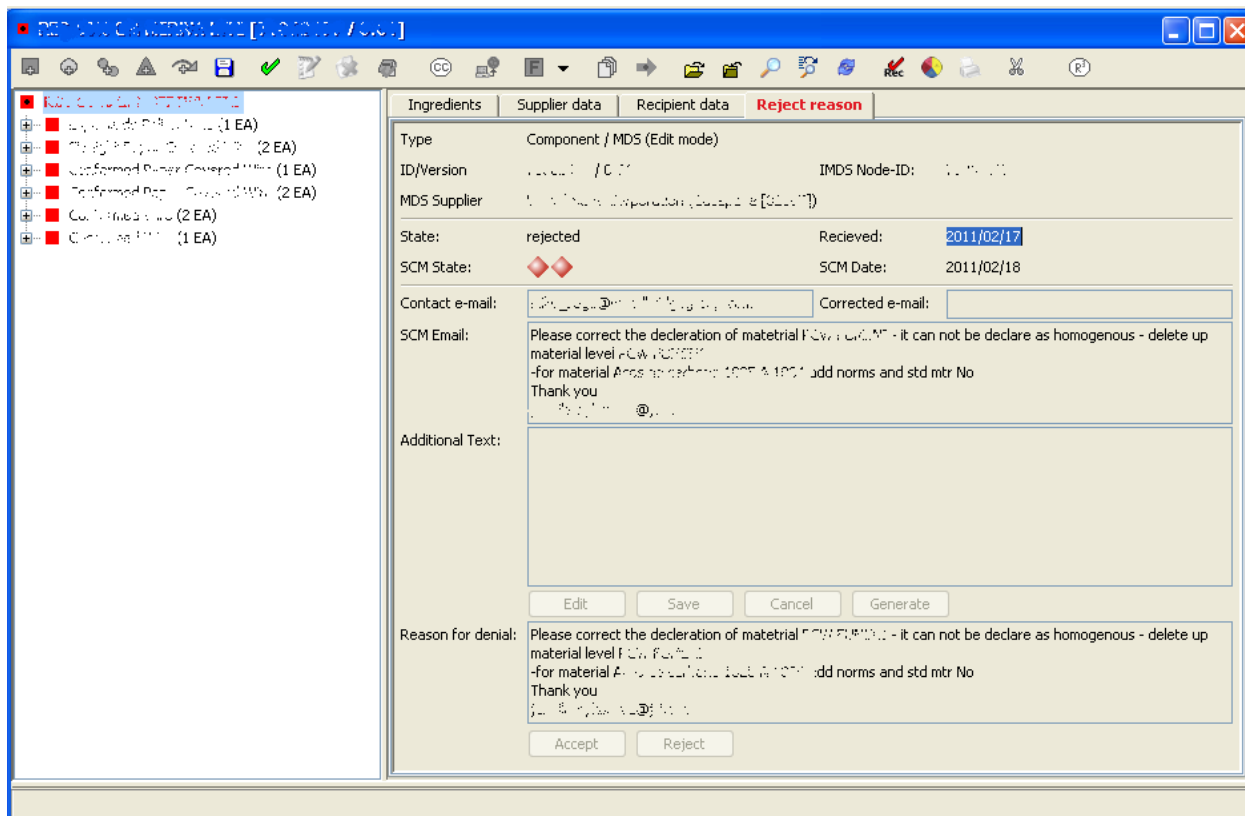

Figure 11: SCM options

- Send SCM email
  Defines if an email containing the whole reason of denial text should be send during rejection.
  The standard preference can be changed through the iPoint support by changing the configuration parameter SCM_SEND_EMAIL.
  If the SCM email (if applicable including signature) is longer than 4000 characters, the email text is chopped and the whole text is added as attachment to the email
- Append signature
  Defines if the user's signature is appended to the SCM email.
  Depending on the configuration parameter SCM_APPEND_SIGNATURE (true or false), the background process "SCM-MDS-Check" will tick the checkbox or not.

  The signature for each user can be changed in the user management.

6.3 Provide reason of denial within MDS

After loading an MDS and selecting the tab "Reject reason" the following window is available:

Figure 12: Editing the reason of denial in iPCA/IHS

The standard functions known from the received MDS panel (edit text, accept, reject) are also available here.

As additional text for the email a new field "Additional text" is available since Version 8.0. It can be edited by the SCM Email buttons "Edit"/"Save"/"Cancel". This text will only be used for the email message and – on contrary to the SCM Email text and Reject reason – is able to store not-European character sets (e.g. in this field it is possible to write messages with Asian font and send it by email).

7   USC functions within iPCA/IHS

7.1   General

The module iPCA/USC (user guided supplier check) is only available in the iPCA/IHS. The web client only shows the state accordingly.

The USC module is an extension for the inbox checks (see also in chapter 6.1). Depending on their configuration checks will either automatically handle found issues as an error or collect them for user review in a ToDo list.
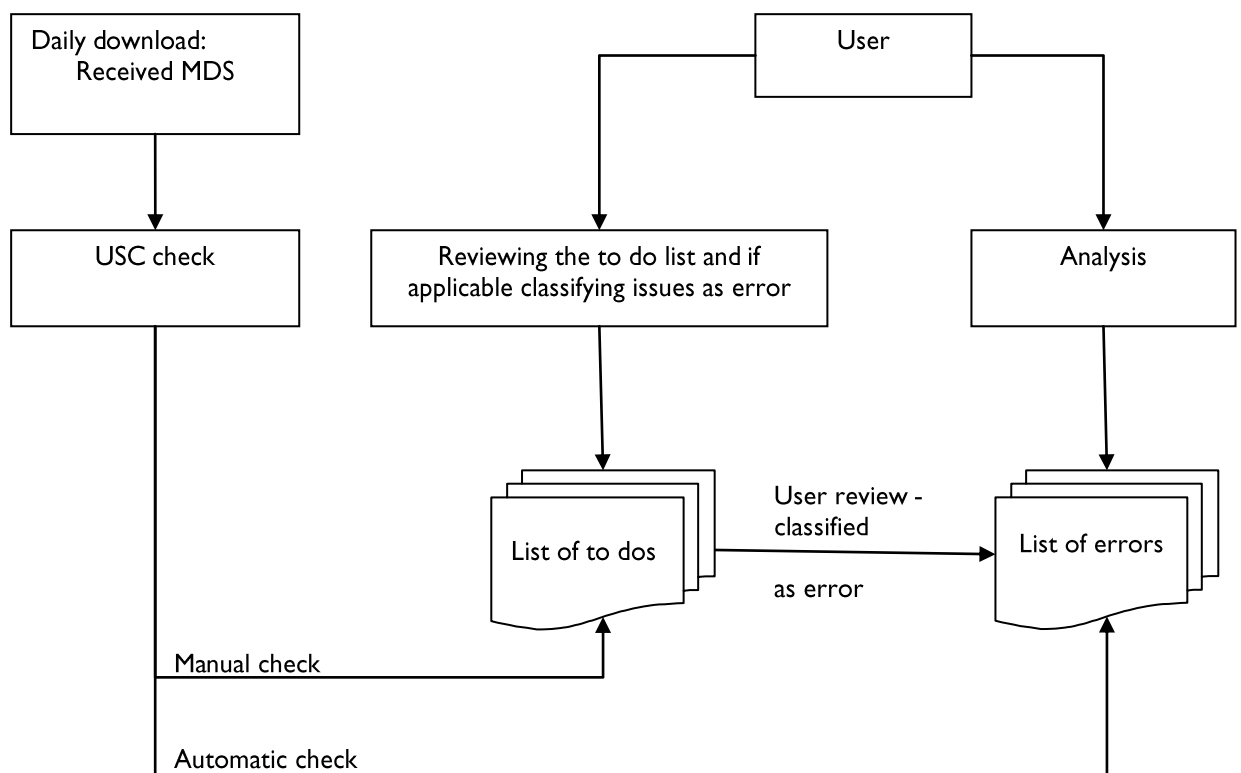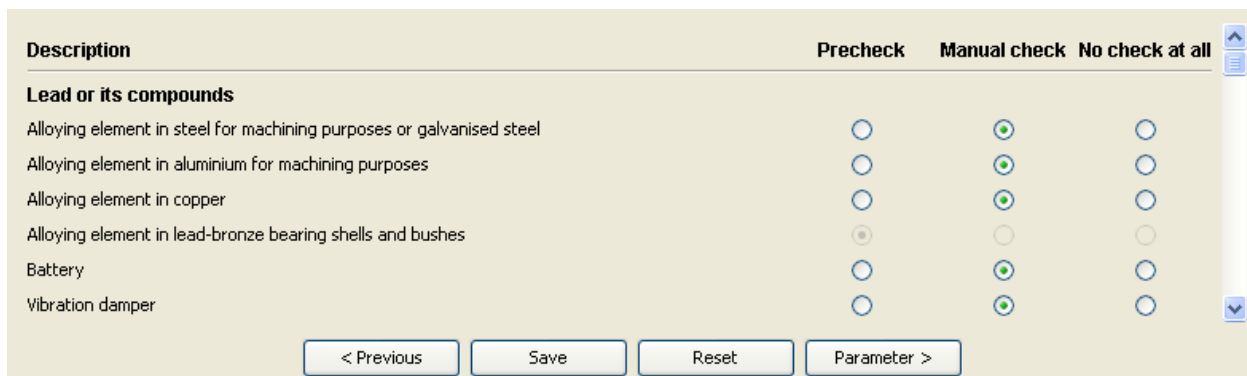
Analysing found errors is also possible (optional).

Figure 13: USC workflow

7.2 Check configuration

Additionally to the standard SCM check groups "Recommendation Checks" and "General Checks" the USC check configuration allows configuring "Application Checks".

Figure 14: Example for an application check configuration

Differing from SCM the following behaviours can be configured for each check:
- Precheck
  If an error is found within the received MDS by the check, it is added to the error list (like in SCM). In a second step (see chapter 7.6) the errors from the list can be added automatically to the reason of denial and the email text
- Manual check
  Found errors are added to the so called "ToDo list". This list must be reviewed by an user, each entry has to be classified as error or no error. Only errors can be transferred to the reason of denial/email text (see chapter 7.5)
- No check at all
  This check will not be performed, no entry is made in either list

If prechecks are not available (mainly for recommendation checks) they cannot be selected in the configuration screen, only "Manual check" and "No check at all" can be chosen.

If applications have been deleted or replaced (e.g. Copper in brake linings), the configuration is set to "Precheck" and cannot be changed – these entries are only listed for information.

The parameter mask "Recipient data" defines the recipients and the recipient data fields which shall be checked for the check "General Checks – Quality Checks – Recipient data" (see usermanual "checkcoverage" chapter 3.1.2.2). The check will be performed only if the check is configured as "Precheck" or "Manual check".
Only organization units of the own company can be selected as recipients.
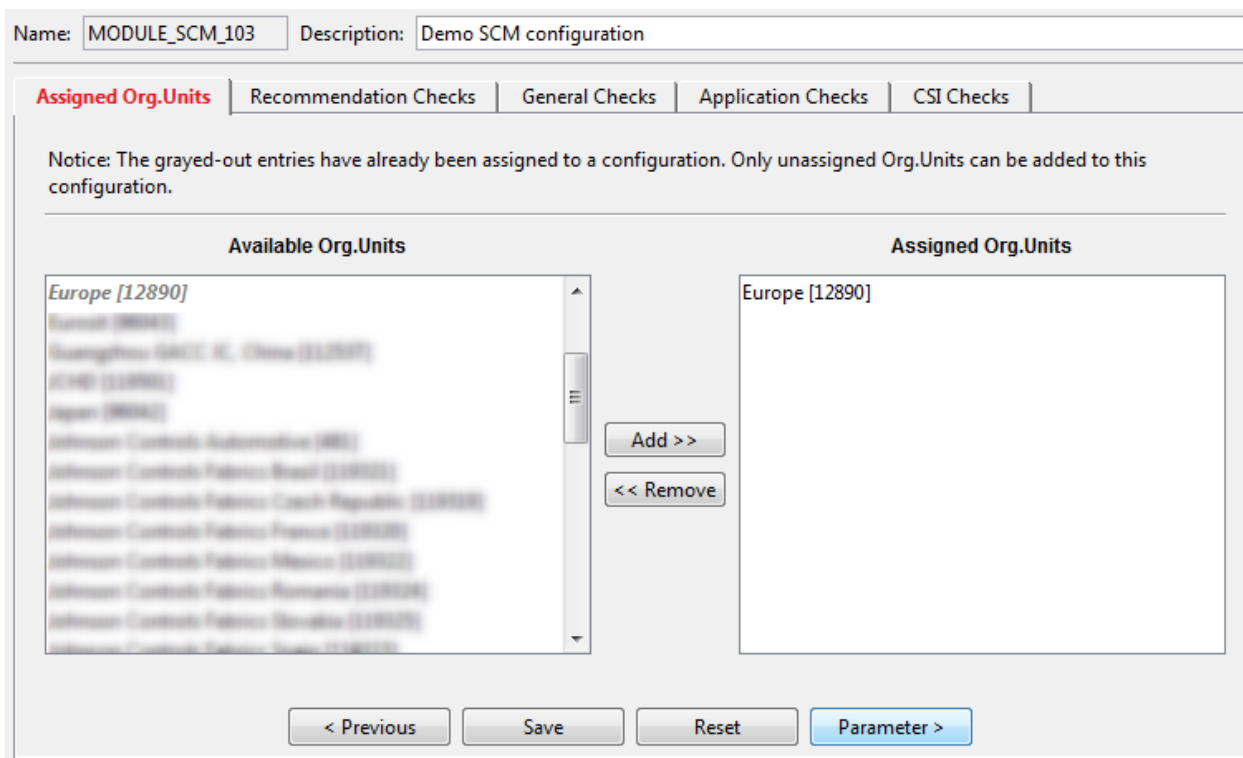If a received MDS is checked then
- the recipient of the MDS will be searched in this list.
- If the recipient is not found then the company is searched for and the data will be compared with this entry.
- If the company is also not found then the recipient data of the given MDS will not be checked.
Hereby it is possible to configure a separate check for each organization unit and/or a company-wide check for all organization units (by specifying the company as recipient).

7.2.1 Management of check configurations (optional)

Provided the appropriate license has been acquired the USC check environment may be individually configured for each organization unit. Therefore an available check configuration is copied and adjusted according to specific requirements. These custom configurations can be assigned to the organization units in the editing area of the particular configuration (see).

Figure 15: Editing area of check configurations

Each organization unit is only assignable to a single configuration at a time and will be greyed-out in the selection list on the left side afterwards. Unassigned organization units use the standard check configuration automatically.

Besides the ID and the description of the particular configurations the IDs of the assigned organization units are listed in the overview table.

7.3 Received MDS
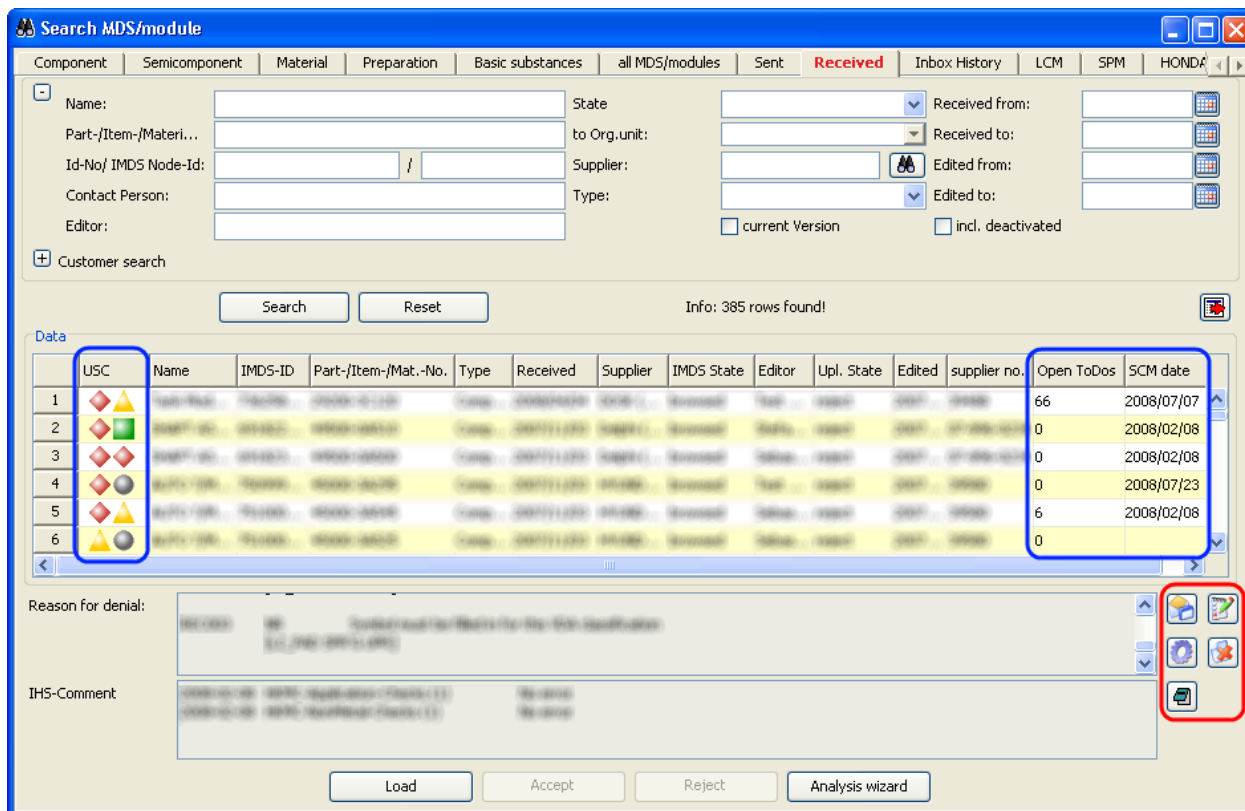
The following USC functions are available within iPCA/IHS:

Figure 16: Received MDS with USC

The following extensions compared to the IHS- and SCM standard modules are available:

- Extended result list (blue area)
  The list contains additional columns besides the SCM date:
  - USC: This column shows the check state for the MDS for the SCM Date.
    For more information please see chapter 7.4 "USC state" starting on page 28
  - Open ToDos: This column shows the number of open issues for manual review which have been found during inbox check and have not been answered yet.
    For more information please see chapter 7.5 "Working with the list of ToDos" starting on page 28
  - Within the search result list also check results of the CSI check are available which have been configured for the USC/inbox check (optional). As soon as a CSI rule group has been checked within the USC its results are available (for the standard table configuration) at the received search result list.
    Users which have an own received search result list configuration can add the CSI result columns (after the first check within USC) with the personalization – see iPCA/IHS manual.

- Additional buttons with SCM and USC functions (red area) und changed functionalities compared to the standard functionality:

  Edit/View reason of denial/SCM email text

  This button is only active, if no open ToDos are left (see chapter 7.6 starting on

page 30)

Edit/View ToDos:
This button will open the selected MDS and show its ToDos. Depending on the MDS state ToDos can be reviewed (see chapter 7.5 starting in page 28)

Show automatically recognized errors
This button is only active, if such errors have been found. The button will open the selected MDS and show its errors found during inbox check

7.4 USC state

The USC state consists of the state of the prechecks and the manual checks.

State inbox check / State ToDos	Meaning
	Not checked (either already accepted/rejected/cancelled when downloaded or accepted/rejected when MDS was not yet checked)
	Waiting for check from system
	System check ok, no ToDos found
	System check ok, open ToDos exist
	System check ok, all ToDos classified as "No error"
	System check ok, no open ToDos, at least one ToDo has been classified as "Error"
	System check found errors, no ToDos exist
	System check found errors, open ToDos exist
	System check found errors, all ToDos classified as "No error"
	System check found errors, no open ToDos, at least one ToDo has been classified as "Error"

Figure 17: USC states

Please note:
Only MDS which have been browsed and have one of the following USC stats can be accepted or rejected:

This means, as long as at least one entry in the ToDo list has not been classified yet the MDS cannot be accepted or rejected!

7.5 Working with the list of ToDos

If checks have been configured as "Manual check" in the check configuration all matching errors found for an MDS during inbox check are stored in the ToDo list. This list can be opened from the Received search or while editing/viewing an MDS by clicking on the button "Edit/Show ToDos"   .

A window (similar to the Q-Checker) containing the ToDo list is opened or optional the ToDos are shown in the lower section of the MDS window.
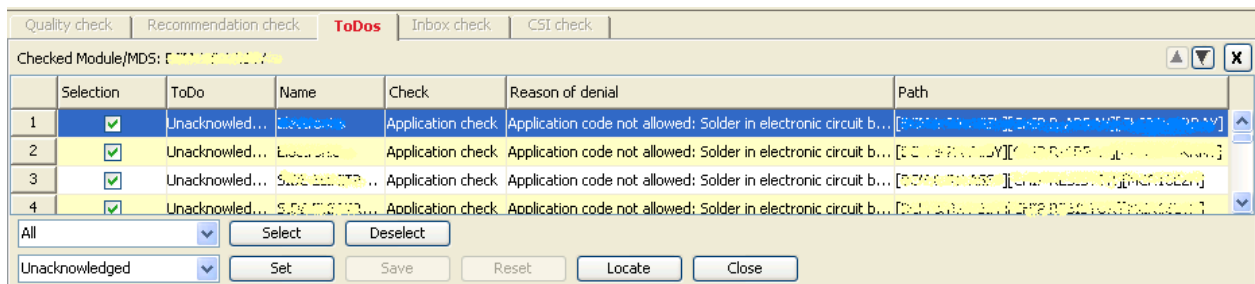
Figure 18: Classifying entries in the ToDo list

In addition to the standard columns known from the Q- or Recommendation checker the column "ToDo" is available. This column displays the classification of each entry – the following classifications are available:

- Unacknowledged
  No user has classified this entry yet.
- Error
  The entry is classified as error an can therefore be transferred to the reason of denial.
- No error
  The entry is not classified as an error.

To classify an entry following is to do:

- First those entries were selected and marked which shall be changed.
  This can be done directly per entry by clicking the check box in the column "Selection". To deselect the check box it has to be clicked a second time.
  If multiple rows shall be selected at the same time an entry must be selected in the upper selection list. By clicking the button "Select" the corresponding entries will be selected.
  Following possibilities are available to set the column "Selection":
  o All
    All entries will be changed, independent of the value of the column "ToDo".
  o Selected row(s)
    If entries are selected in the result list by using the mouse (all e.g. by Ctrl-A) and they are displayed with a coloured background then those rows will be changed and the checkbox will be set, independent of the value of the column "ToDo".
  o All + values from the classification list
    Those entries will be set which ToDo's column contain the corresponding value of the selection list.
  The same behaviour is also for deselecting the entries, only by clicking the button "Deselect".
  When the list is displayed after loading all entries are pre selection which contain open ToDos (i.e. the classification is "Unacknowledged").
- Next a value must be chosen from the lower, left selection list with the classifications (see above). By clicking of the button "Set" this value will be set in the column ToDo for all entries that has been set by the column "Selection".

The following actions are available:

- Save
  If entries have been classified they can be saved with this button.
- Reset
  All changes are discarded, the list is reloaded.
- Locate
  By pressing this button the erroneous node is shown within the MDS tree with details and the error can be reviewed. For general errors the root node is shown.
- Close
  Closes the window.

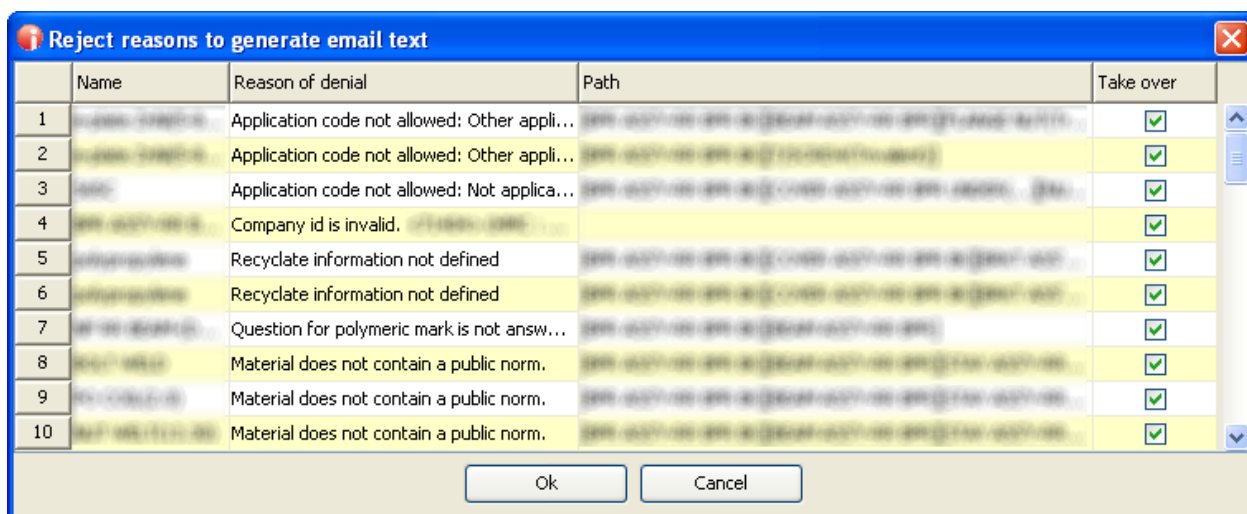## 7.6 Creating/editing reason of denial within MDS

If all entries of the ToDo list have been classified the reason of denial has to be generated by:
- clicking on the button "Edit/View SCM Email" in the Received search window ( )
- clicking "Edit" in an loaded MDS in the tab "Reject reason" (see also chapter 6.3 starting on page 23)

If the reason of denial is empty, a window is shown as described in chapter 0 and the reason of denial has to be generated. If the reason of denial/SCM email text is filled, it can be regenerated from the error list by pressing the button "Generate".

7.6.1 Creating a reason of denial

A window is opened which shows all errors found by the system and all ToDo entries which have been classified as an error.

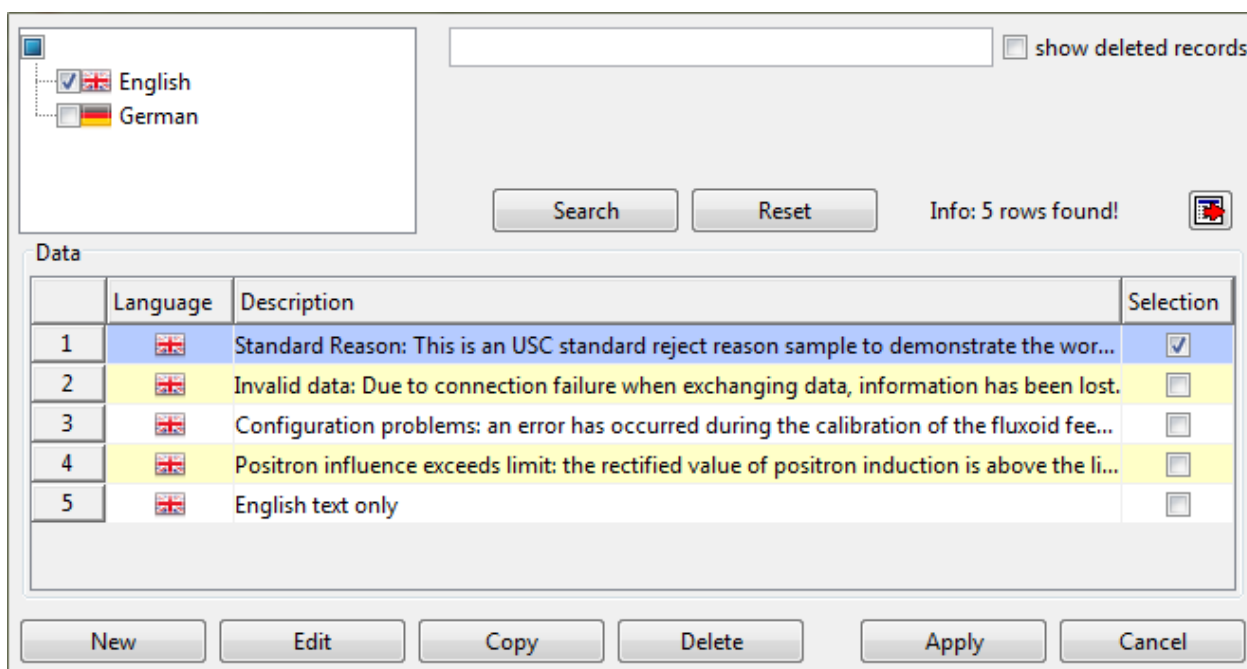**Figure 19: Generating the reason of denial**

All entries are marked for transfer into the reason of denial/SCM email text in the column "Take over". If an entry should not be transferred, it must be unchecked in this column.

In addition to the reasons provided by the system, there is the possibility to select predefined reject reasons (optional). The Button "+" opens a new dialog to select those predefined texts. According to the configuration these texts may be searched and selected in different languages. The selected reasons are listed below the list of errors in the main language only. In the subsequent generation all configured languages are taken into account. Creating new, or edit and delete existing texts is possible only with additional rights.

If all decisions have been made, the reason of denial/SCM email text can be generated by pressing "Ok". All entries marked for "take over" will be transferred into the SCM Email text and up to the first 4000 characters are transferred into the reason of denial. Afterwards the window closes.
By pressing "Cancel" all changes are discarded and the window closes.

7.6.2 Management of predefined reject reasons (optional)

Provided that appropriate permissions are set, the editing options for the selection screen of the predefined reject reasons are enabled (see Figure 20: Selection screen of predefined reject reasons). These options enable the user to create new or edit available texts in different languages. The maximum text length is limited to 2000 characters. Inserted text exceeding this limit will be cut.

Figure 20: Selection screen of predefined reject reasons

Available reject reasons can be searched using the search field on top of the screen. The language filter on the upper left enables the user to filter the search results for specific languages.

7.6.3 Editing a reason of denial

Editing the reason of denial/SCM email text is the same as with SCM – see chapter 6.2 starting on page 20.

By pressing on "Generate" the reason of denial can be regenerated if necessary. Attention: The existing reason of denial/SCM email text will be overwritten!

8 User administration

The user administration is available in a separate application which is only available for administrators.

More information can be found in the user administration documentation.

9 Glossary

term	explanation
MDS	A MDS is a Material Data Sheet which is created by a company and sent to other companies or which is published to all users of IMDS in order to be used in their Material Data Sheets. It contains information about the ingredients as well as supplier- and recipient data
Module	A module is similar to a MDS but it is exclusively for internal use. Modules cannot be sent or published and therefore contain no other data than ingredients. If a component or a semi-component is often used in other products, a module can be created as a 'construction kit' and can be often re-used in the structure tree of other modules/MDS. Therefore modules are always available as reference and don't have to be created again. Materials are always created at least as modules.
Simple node	If a component or semi-component is added to the structure tree it is only available in this MDS/module. The item is then called 'simple node'. Simple nodes are only visible in that MDS/module in which they were created. They aren't visible in the summary lists this means they cannot be re-used in other MDS/modules. The symbol for a simple node does not contain a black dot.
Component	A component is an assembly or a simple component of another component. A component can contain any other structure types of IMDS except substances. A special kind of a component is the Flat bill F . For information about creation and handling of flat bills please refer to the Flat bill documentation.
Semi component	A semicomponent is a product which has at least one more step in the processing chain to become a component, i.e. a cable or a plastic foil. It's weight can only be given when it is added to the structure tree. What is defined as semi-component or as a material (i.e. colours, glues, fats) should be agreed between the supplier and the recipient of the MDS. Underneath a semi-component only other semi-component or materials can be added to the structure tree.
Material	A material is the basis of each component or semi-component (plastics, metals, etc.) and consists of other material or basic substances. A material must consist of at least one basic substance.
Basic Substance	Basic substances are the main substances which are included in a component or semi-component. They are chemical elements or chemical combinations as they naturally occur or are produced. They have to be added to a material and are solely created by the EDS-Service-Team. If there are underneath a component or semi-component basic substances integrated, then these are old MDS/modules which have been entered in the starting period of IMDS. This creation of a MDS/module is not allowed any longer and is declined when checking the structure. Therefore these MDS/modules have to be exchanged in the own created MDS/modules.
Missing Position	A missing position is a component/semicomponent/material which was not found during the load of a BoM (CSV, PDM/ERP/SAP interface). A missing position is therefore documenting a missing MDS/module. A missing position will always been shown as a component (simple node).

10 Table of figures

11 Change History

Version	Date	Description
4.0	05/26/2006	Complete revision Added Change history
5.1	06/08/2007	Added documentation SCM status See chapter 3.3 "Status inside the Inhouse-System and inside the IMDS" Added SCM functions in iPCA/IHS See chapter 6
5.3	09/01/2008	New language selection when logging in See new chapter 5.1 "Logon" starting on page 13. Updated Figure 4: SCM search panel
6.0	2008/06/15	Updated for Release 6
7.0	2009/06/04	Updated for Release 7
7.14	2010/06/25	Multiple editing of entries in the ToDo list
7.22	2010/12/17	CSI check results from USC check in received search result list (optional) – see chapter 7.2.1
8.00	2011/06/01	Added additional email text in chapter 6.3
9.00	2012/10/15	Changes for Release 9.0
9.04	2013/03/07	Predefined reject reasons for USC/SCM rejection eMails (optional) in chapter 7.6
9.04	2013/04/03	Org. unit specific check configurations (optional) in chapter 7.2