



iPoint

iPCA

SPM

V14.05 onwards

iPCA SPM

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Imprint

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1 Introduction

1.1 General

This document describes the functionality of the module iPCA/SPM (iPoint Compliance Agent – Supply Part. Management) - creation and maintenance of MDS requests for supply parts.

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

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

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

2 Support

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

This administrator will check and answer your enquiry.

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

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



3 New functions

Version	Description
14.05	Added support for supplier site code (optional)
14.03	Added new tab "PDM SPM configuration parameter" in the "PDM Configuration" parameters panel
14.01	Added "Remark" as a new search criterion
13.22	New configuration parameters to control IMDS datasheet – SPM request matching logic Added friendly reminder feature Added feature that is automatically updating contacts set in the SPM request upon they are changed/deleted in the company management or in IMDS
13.00	Bulk SPM email is now available to all SPM customers Search criteria "from Org.unit" in "SPM" tab in the main search panel changed from text field to list box to allow to search for SPM requests assigned to different organization units at the same time
12.19	SPM Parameter panel extended with two new checkboxes for optional feature allowing automatic selection of the contact person and automatic population of the email addresses for CC email upon selection on of a supplier
12.16	New optional feature allowing automatic selection of the contact person and automatic population of the email addresses for CC email upon selection on of a supplier (supported for manual and automated SPM request creation)
12.05	Improved handling of languages in SPM Parameters panel
12.03	Bulk email and escalation now supports multilanguage feature
12.00	Allowed to assign MDS of different type than defined in the SPM request
11.07	New configuration parameter "SPM_FORCE_ONLINE_REQUEST" allowing to force upload of the SPM request to the online IMDS system instead of just sending the email to the supplier
11.06	New email notifications for two events: <ul style="list-style-type: none">• SPM request closure (status "Assigned MDS accepted")• SPM request inactivation
10.12	Switched positions of "Edit" and "Generate" button for better user experience New notification message on save of SPM request without an email text
9.09	Bulk SPM email functionality New status "Marked to send email"
9.05	Redesigned SPM request form Added new search criteria and new column into the result list Multilanguage support More functions can be controlled by permissions
9.03	Multi edit of SPM requests
9.00	Integration of the optional module „Multi Number Support“ Take over IMDS-Id into email text when creating a new SPM request out of the



Version	Description
	“Thick Client” Multiple email recipients as "CC" Possibility to add attachments to the email Take over only active contact persons Store a corrected email address for the contact person Suspending/Switch off the SPM reminder email
7.5	Configurable default value for search criterion “Only incomplete”
6.0	New search criteria: ID, Requestor and Sender “Part Number Check” before save a new request
5.4	New status: “IMDS request rejected by supplier”
5.2	More flexible email sender address
5.01.006	Project specific email-address for escalation
5.1	New symbols for easier recognition of the different status Availability of the full functionality in iPCA/IHS
4.06.004	Manual assignment of MDS Limit own Organization Unit to a central one Search for open, not yet sent requests Escalation of requests Search for requests about a specific MDS Delete MDS New actions when creation a request New actions when editing a request New additional parameter
4.02	Complete new user administration (see own documentation) Support for IMDS Online requests Enhanced email generation

4 Basic terms

4.1 Short description

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

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

Every milestone in the lifecycle of the request is documented.

4.2 Abstract

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

5 SPM request

5.1 Ways to create SPM request

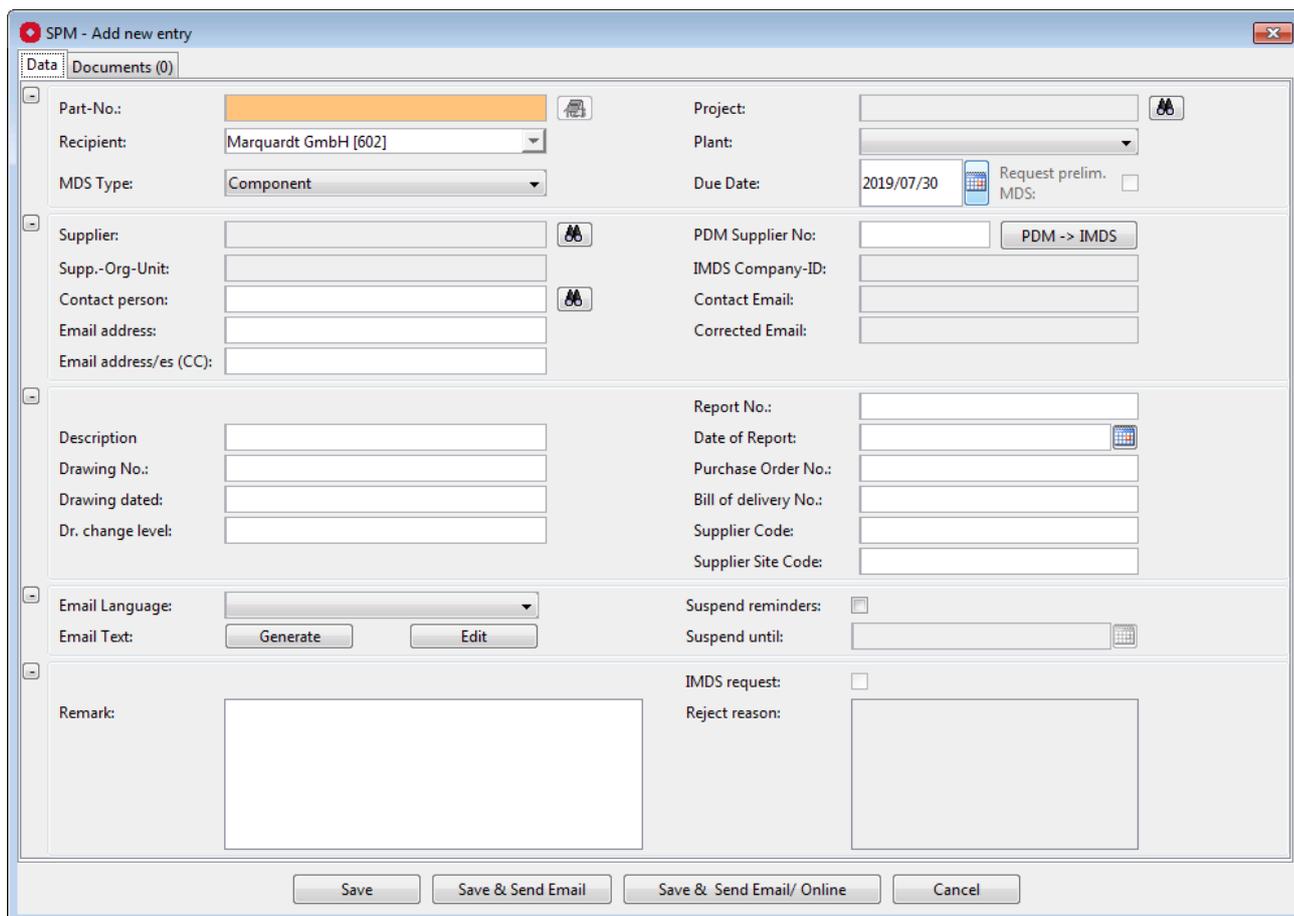
New SPM request can be created:

- manually by navigation to the menu “File → New → Create SPM request” (see **chapter 5.2**),
- manually by click on the icon  in the icon bar (see **chapter 5.2**),
- manually by click on the “Create SPM Request” in the dialog window in the opened received MDS (see **chapter 5.3**),
- automatically by BOM import (see **chapter 5.4**)

5.2 Create new SPM request

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

PLEASE NOTE: Only user with activated permission “SPM” can create new SPM request.



The screenshot shows the 'SPM - Add new entry' dialog box. It is divided into several sections with expandable/collapsible icons on the left. The top section includes fields for 'Part-No.', 'Recipient' (set to 'Marquardt GmbH [602]'), 'MDS Type' (set to 'Component'), 'Project', 'Plant', and 'Due Date' (set to '2019/07/30'). There is a 'Request prelim. MDS:' checkbox. The middle section contains 'Supplier', 'Supp.-Org-Unit', 'Contact person', 'Email address', 'Email address/es (CC)', 'PDM Supplier No.', 'IMDS Company-ID', 'Contact Email', and 'Corrected Email'. A 'PDM -> IMDS' button is also present. The bottom section has 'Description', 'Drawing No.', 'Drawing dated', 'Dr. change level', 'Report No.', 'Date of Report', 'Purchase Order No.', 'Bill of delivery No.', 'Supplier Code', and 'Supplier Site Code'. The final section includes 'Email Language', 'Email Text' (with 'Generate' and 'Edit' buttons), 'Suspend reminders:' checkbox, 'Suspend until:', 'Remark', 'IMDS request:' checkbox, and 'Reject reason:'. At the bottom, there are four buttons: 'Save', 'Save & Send Email', 'Save & Send Email/ Online', and 'Cancel'.

Figure 1 Create new SPM request

5.2.1 SPM details

The fields in the SPM request are sorted and split into logical areas, which could be folded and unfolded:

- General (see **chapter 5.2.1.1**)
- Supplier Data (see **chapter 5.2.1.2**)
- Recipient Data (see **chapter 5.2.1.3**)
- Email Data (see **chapter 5.2.1.4**)
- Others (see **chapter 5.2.1.5**)

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

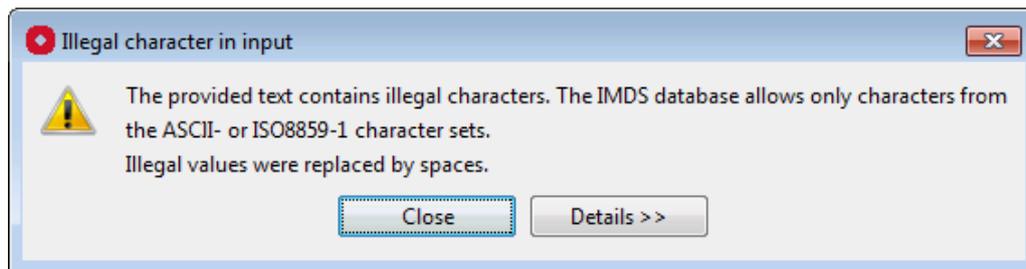


Figure 2 Error message shown to the user in case illegal characters were inserted

5.2.1.1 General

Following information must/could be defined:

- **Part-No.**
Own part number of the item, for which the SPM request will be created.
- **Multi numbers**
Multiple part numbers of the items, for which is applicable the SPM request, which will be created. Before first save of the SPM request button is inactive. On save of the SPM request, the button becomes active and multiple numbers can be defined. This will be added also to the email text for the SPM request.
- **Recipient**
Own organization unit, for which the SPM request will be created. Recipient can be chosen from the drop-down list, which contains all active IMDS organization units.
PLEASE NOTE: If “**Central MDS Inbox**” is option activated in the “**SPM Parameter**” screen, this drop-down list is read-only so no value can be selected.
- **MDS Type**
Type of the MDS expected to be send for an item, for which the SPM request will be created. MDS type can be chosen from the drop-down list, which contains following values:

- Component
 - Semi Component
 - Material
- **Project**
The project which the item for which the SPM request will be created is linked to.
Project can be chosen using the  button, which will load standard project search window. Wished project can be then confirmed by click on the “**Apply**” button.
Projects are managed in the “**Projects**” master data (see **chapter 7.4**).
 - **Plant**
Manufacturing plant of the item, for which the SPM request will be created.
Plant can be chosen from the drop-down list.
Plants are managed in the “**Plants**” master data (see **chapter 7.5**).
 - **Due date**
Deadline given to the supplier to provide an MDS for an item, for which the SPM request will be created.
Value is automatically set to **due date = SPM request creation date + Number of days for due date** (defined in the “**SPM Parameter**” screen).
This can be changed either by manual modification of the date in the text field or by using  button and selecting the date from the calendar shown.
 - **Request prelim. MDS**
Information whether the preliminary MDS needs to be send for an item, for which the SPM request will be created.
This will be added also to the email text for the SPM request.



The screenshot shows a form with the following fields and values:

Part-No.:	<input type="text" value=""/>		Project:	<input type="text" value=""/>	
Recipient:	<input type="text" value=""/>		Plant:	<input type="text" value=""/>	
MDS Type:	Component		Due date:	2013/08/12	
					Request prelim. MDS: <input type="checkbox"/>

Figure 3 General area of the SPM request

5.2.1.2 Supplier Data

Following information must/could be defined:

- **Supplier**
Name of the IMDS company, which the SPM request will be addressed to.
The supplier can be defined by click on the  button, which will load standard company search window. Wished supplier can be then confirmed by click on the “**Apply**” button.
- **Supp.-Org.-Unit**
Name of the organization unit of the selected supplier.
This field is read-only and cannot be modified by the user.



- **Contact person**

The person at the supplier to whom the requesting email will be sent.

The contact can be defined by click on the  button, which will load the dialog window showing all active contacts for the selected supplier. Wished contact can be then confirmed by click on the “**Apply**” button.

It is also possible to correct an email of the contact by click on the “**Correct**” button or to define a brand-new contact by click on the “**New**” button.

OPTIONAL: If the SPM Contact Priority Module is licensed and the “**Auto assign primary contact**” checkbox is checked in the SPM Parameters and one contact of the selected supplier is marked as “**Primary Contact**” (see **chapter 7.6**) then this contact is automatically selected and entered upon selection of the supplier.

- **Email address**

The email address of the selected contact as defined in IMDS system.

This email address can be edited or changed according to the user needs.

If the email address has been changed, on saving the SPM request, the user is asked, if the defined email address should be saved as new email contact for the selected contact (see **Figure 4**).

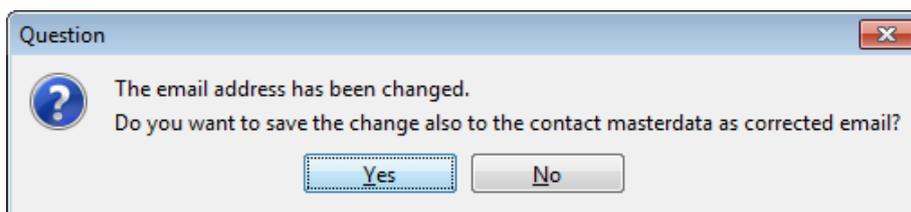


Figure 4 Question whether defined email address should be saved for selected contact

OPTIONAL: If the SPM Contact Priority Module is licensed and the “**Auto assign primary contact**” checkbox is checked in the SPM Parameters and one contact of the selected supplier is marked as a “**Primary Contact**” (see **chapter 7.6**) then email address of this contact is automatically selected and entered upon selection of the supplier.

- **Email address/es (CC)**

The field for definition of additional email recipients for the SPM request emails.

Multiple email addresses can be defined. They must be separated by semicolon “;”.

OPTIONAL: If the SPM Contact Priority Module is licensed and the “**Auto add secondary contact(s) as CC recipient(s)**” checkbox is checked in the SPM Parameters and at least one of the contacts of the selected supplier is marked as a “**Secondary Contact**” (see **chapter 7.6**) then email address of this contact is automatically selected and entered upon selection of the supplier.

- **PDM Supplier No**

If the supplier code of the supplier who should send the MDS for the item, for which the SPM request will be created, is entered into this field and user clicks on the “**PDM -> IMDS**” button, dialog window is opened (see **Figure 5**).

In this dialog window, the list of all suppliers who ever used defined value as the supplier code for any of the accepted MDS, is shown. The list is sorted by quantity of the MDS, in which the supplier code was used.

Wished supplier can be then confirmed by click on the “Ok” button. This will take over the supplier details into the “Supplier”, “Supp.-Org-Unit” and “IMDS Company ID” fields in the SPM request.

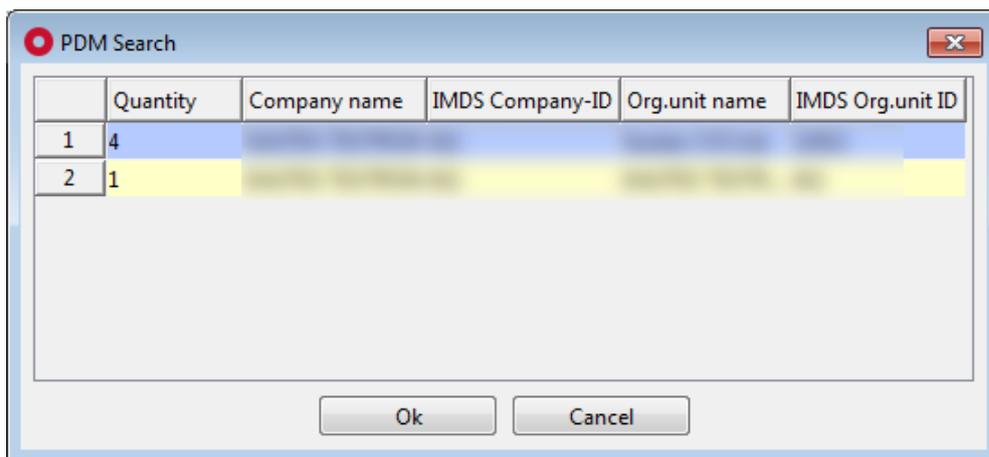


Figure 5 List of suppliers matching defined supplier code

- **IMDS Company-ID**

IMDS company ID of the selected supplier.
This field is read-only and cannot be modified by the user.

- **Contact Email**

The email address of the selected contact as defined in IMDS system.
This field is read-only and cannot be modified by the user.

- **Corrected Email**

The corrected email address of the selected contact.
This field is read-only and cannot be modified by the user. If required, this can be defined in the contact master data.

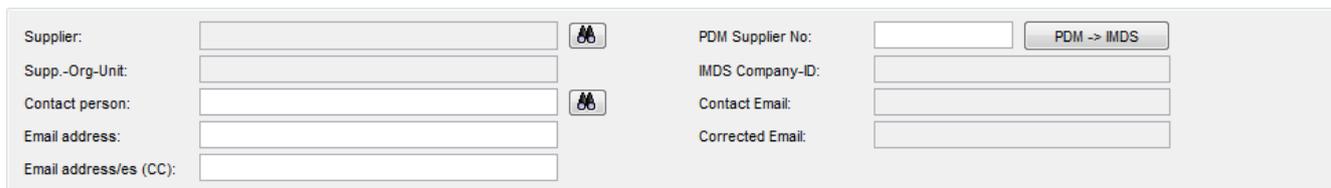


Figure 6 Supplier data area of the SPM request

5.2.1.3 Recipient Data

Following information must/could be defined:

- **Description**
Own description of the item, for which the SPM request will be created.
- **Drawing No.**
The drawing number of the item, for which the SPM request will be created.
- **Drawing dated**
The date of the drawing of the item, for which the SPM request will be created.
- **Dr. change level**
The change level of the drawing of the item, for which the SPM request will be created.
- **Report No.**
The number of the sample report of the item, for which the SPM request will be created.
- **Date of Report**
The date of the sample report of the item, for which the SPM request will be created.
This can be defined either by manual definition of the date in the field or by using  button and selecting the date from the calendar shown.
- **Purchase Order No.**
The purchase order number of the item, for which the SPM request will be created.
- **Bill of delivery No.**
Bill of delivery number of the item, for which the SPM request will be created.
- **Supplier Code**
The supplier code of the supplier in the PDM/ERP system of the item, for which the SPM request will be created.
- **Supplier Site Code**
The supplier site code of the supplier of the item, for which the SPM request will be created.
This column is shown only in case the SPM Supplier Site Code module is licensed.

Part-No.:	<input type="text"/>	Report No.:	<input type="text"/>
Description	<input type="text"/>	Date of Report:	<input type="text"/> 
Drawing No.:	<input type="text"/>	Purchase Order No.:	<input type="text"/>
Drawing dated:	<input type="text"/>	Bill of delivery No.:	<input type="text"/>
Dr. change level:	<input type="text"/>	Supplier Code:	<input type="text"/>
		Supplier Site Code:	<input type="text"/>

Figure 7 Recipient data area of the SPM request

5.2.1.4 Email data

Following information must/could be defined and used:

- **Email language**

The language of the email for the actual SPM request.

If no language is selected, the emails for the SPM request are sent in the default SPM language set in the “**SPM Parameter**” screen.

The SPM request specific language can be chosen from the drop-down list, which contains all languages defined in the “**SPM Parameter**” screen. Then, all emails for the particular SPM request, including reminders are sent in the selected language.

In case the email text for the SPM request is already generated, language change is reflected by click on the “**Generate**” button.

- **Email Text**

Text of the email for the SPM request could be either generated by click on the “**Generate**” button or created by hand or modified by click on the “**Edit**” button.

In case of using email generate function the email text will be compiled from data entered in the SPM request form and in the “**SPM Parameter**” screen.

- **Suspend until**

The sending of the email can be suspended until certain date.

This can be defined upon checking the checkbox “**Suspend reminders**” either by manual definition of the date in the text field or by using  button and selecting the date from the calendar shown. Activation of this will be logged in the history of the SPM request.

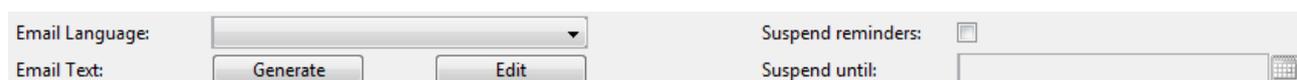


Figure 8 Email data area of the SPM request

5.2.1.5 Others

Following information must/could be defined:

- **Remark**

Internal remarks for the SPM request can be entered into this field. This is not used for any SPM email.

Following additional information are displayed in the SPM request form:

- **IMDS request**

If the checkbox is checked, the SPM request was successfully uploaded to live IMDS system. This is set automatically upon the upload.

This checkbox is read-only and cannot be modified by the user.

- **Reject reason**

In this field, the reject reason, explaining why the supplier has rejected the SPM request uploaded to live IMDS system, is shown.

This field is read-only and cannot be modified by the user.



The screenshot shows a form with two main sections. On the left, there is a 'Remark:' label followed by a large empty text box. On the right, there is an 'IMDS request:' label with a small square checkbox, and below it, a 'Reject reason:' label followed by another large empty text box.

Figure 9 Others area of the SPM request

5.2.2 SPM documents

In the “**Documents**” tab files can be managed for the SPM request (see **Figure 10**). These are there appended to the every email sent for the particular SPM request.

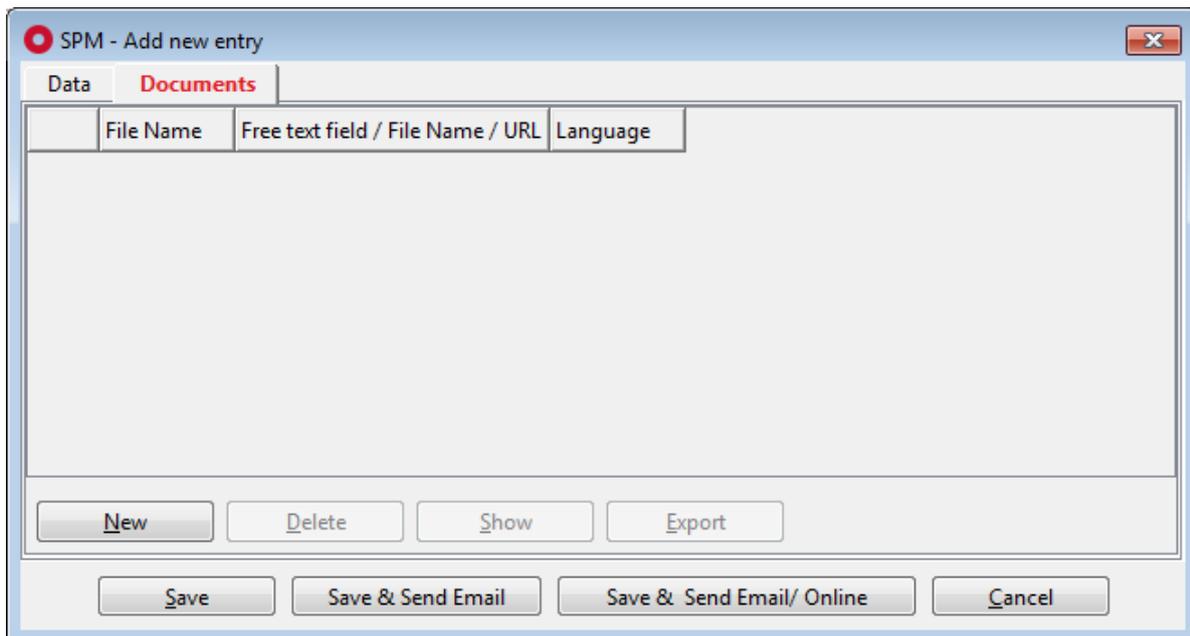


Figure 10 Documents tab in the SPM request window

Following buttons are available:

- **New**

Upon clicking on this button, the dialog window is shown. By click on the button  the target file can be selected.

Selected file can be then added to the SPM request by click on the “**Apply**” button.

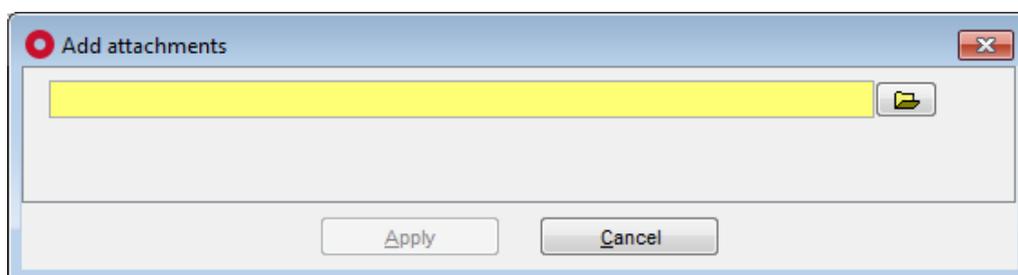


Figure 11 Dialog for addition of the attachment to the SPM request

- **Delete**

The file can be removed from the SPM request by its selection in the overview of the files and by click on the “**Delete**” button.

This will bring up a small pop-up window (see **Figure 12**).

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

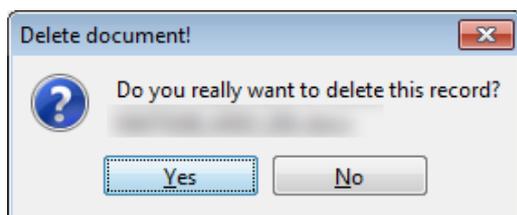


Figure 12 Confirmation of deletion of a file from the SPM request

- **Show**

The file stored in the SPM request can be displayed by first selecting it in the overview of the files (see **Figure 10**) and by click on the “**Show**” button.

- **Export**

The file stored in the SPM request can be exported by first selecting it in the overview of the files (see **Figure 10**) and clicking on the “**Export**” button.

This will load a dialog window for saving the file (see **Figure 13**). The target directory for storage of the document can be defined by click on the “**File...**” button and then by click on the “**Save**” button.

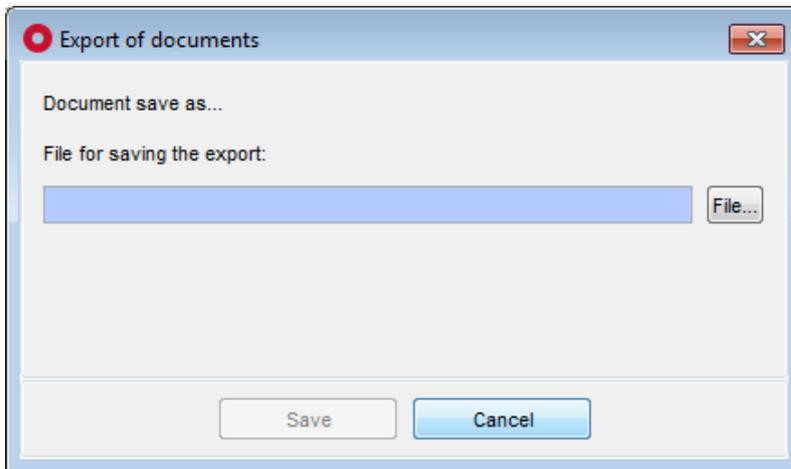


Figure 13 Dialog for exporting the file from the SPM request

5.2.3 Finishing SPM request creation

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

- **Save**
Saves the SPM request in iPCA.

PLEASE NOTE: In case that the value defined in “**Part-No.**” field in the next SPM request is the same as of any of existing SPM requests, a notification is shown to the user (see **Figure 14**). By click on the “**Yes**” button the SPM request will be saved. By click on the “**No**” button, the SPM request will remain opened and user can either change the part number or cancel it. In case that the not all mandatory fields are populated an error message is shown (see **Figure 15**).

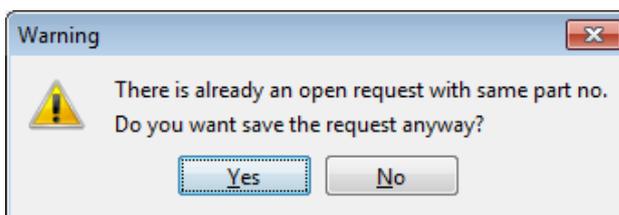


Figure 14 Notification that new SPM request has the same part number as existing on

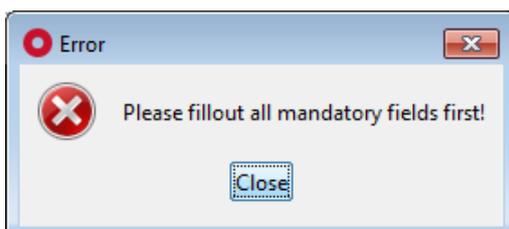


Figure 15 Error message shown on save of a SPM request

- **Save & Send Email**

Saves the SPM request in iPCA and sends generated email to the contact person defined in the SPM request.

This button is active in case the SPM request is in one of below states:

- IMDS supplier and contact person assigned
- Marked to send email
- Mail sent
- IMDS request rejected by supplier
- MDS received
- Assigned MDS rejected

PLEASE NOTE: This button can be inactivated for the SPM request in state “**IMDS supplier and contact person assigned**” to force the upload of the SPM request to the online IMDS system. For this, the value of the configuration parameter “**SPM_FORCE_ONLINE_REQUEST**” needs to be set to “**TRUE**” (see **chapter 7.7** for more details).

- **Save & Send Email/ Online**

Saves the SPM request in iPCA, sends generated email to the contact person defined in the SPM request and uploads the SPM request to the online IMDS system.

This button is active in case the SPM request is in one of below states:

- IMDS supplier and contact person assigned
- Marked to send email (only in case of offline SPM request)
- Mail sent (only in case of offline SPM request)

PLEASE NOTE: Only user with activated permission “**SPM_IMDS_UPLOAD**” can upload SPM request to the online IMDS system.

- **Cancel**

Discards changes done.

5.3 Create SPM request from existing received MDS

In case the new SPM request was created from already received MDS, the SPM request dialog window is populated with details of this MDS.

- Part number
- Recipient
- MDS Type
- Supplier
- Contact person
- MDS
- Complete recipient data
- Email text

Email text contains also a reference to the IMDS ID of the MDS, for which the SPM request was created.

For the description of the items shown in the SPM request form, please see the **chapter 5.2.1**.

PLEASE NOTE: Only user with activated permission “**SPM_REQUEST_FROM_EXISTING_MDS**” can create SPM request from received MDS.

5.4 Create SPM by BOM import

In case the BOM import is done (IMDS or VP) and the configuration parameter “**PDM_CREATE_SPMREQUEST**” is set to “**TRUE**” and matching MDS/module is not found for the part, the SPM request with below list fields populated is created:

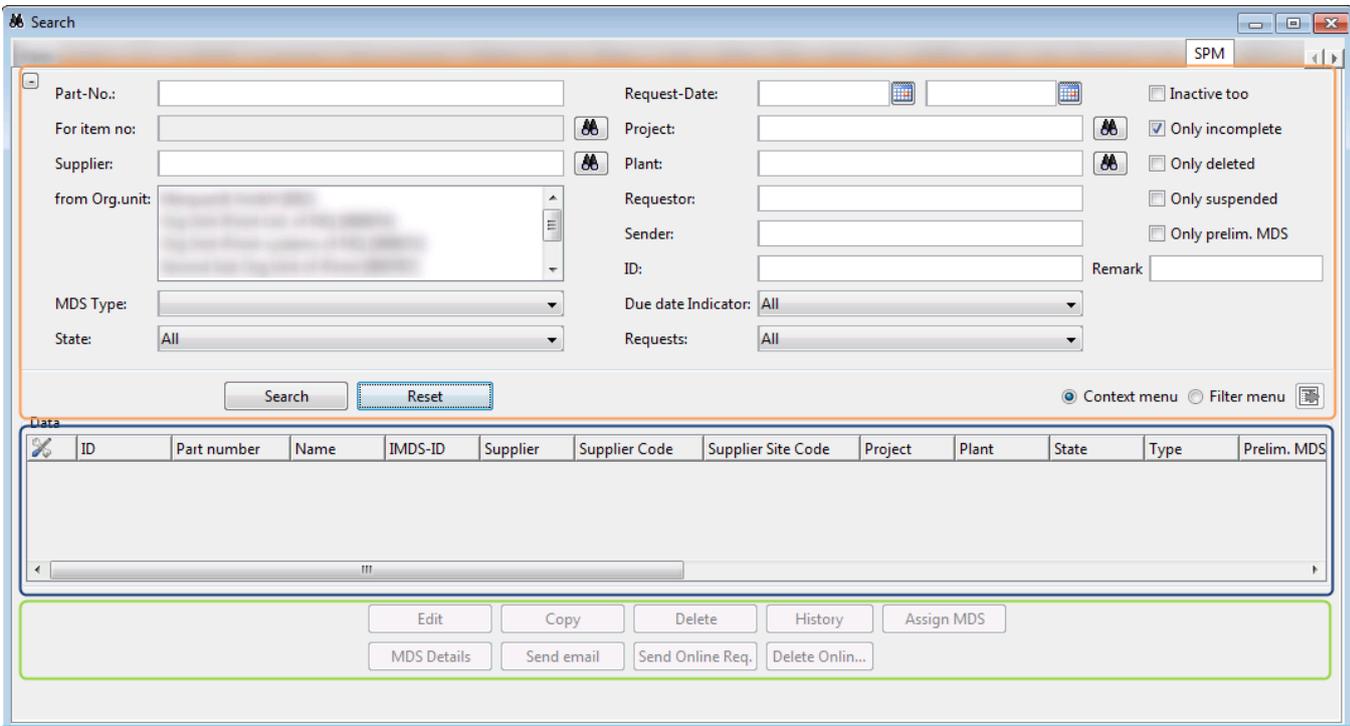
- Part number
- Recipient
- MDS Type
- Supplier (in case the supplier code is set in the BOM and matching supplier was found)
- Contact person (in case the supplier code is set in the BOM and matching supplier was found)
- Email text

OPTIONAL: If the SPM Contact Priority Module is licensed and the “**Auto assign primary contact**” checkbox is checked in the SPM Parameters and one contact of the selected supplier is marked as “**Primary Contact**” then this contact is automatically selected. Additionally, if the “**Auto add secondary contact(s) as CC recipient(s)**” checkbox is checked in the SPM Parameters and at least one of the contacts of the selected supplier is marked as “**Secondary Contact**” then email address of this contact is automatically selected and entered upon selection of the supplier.

6 SPM tab

The SPM tab is split into three areas:

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



The screenshot shows the 'Search' window for SPM requests. The search mask area (orange border) contains the following fields:

- Part-No.: [Text input]
- For item no.: [Text input] with a search icon
- Supplier: [Text input]
- from Org.unit: [List box]
- MDS Type: [Dropdown menu]
- State: [Dropdown menu, set to 'All']
- Request-Date: [Date range picker]
- Project: [Text input] with a search icon
- Plant: [Text input] with a search icon
- Requestor: [Text input]
- Sender: [Text input]
- ID: [Text input]
- Due date Indicator: [Dropdown menu, set to 'All']
- Requests: [Dropdown menu, set to 'All']
- Remark: [Text input]
- Filter checkboxes:
 - Inactive too
 - Only incomplete
 - Only deleted
 - Only suspended
 - Only prelim. MDS

Buttons: Search, Reset, Context menu, Filter menu.

The Data table (blue border) has the following columns:

ID	Part number	Name	IMDS-ID	Supplier	Supplier Code	Supplier Site Code	Project	Plant	State	Type	Prelim. MDS
[Empty table body]											

Buttons below the table (green border): Edit, Copy, Delete, History, Assign MDS, MDS Details, Send email, Send Online Req., Delete Onlin...

Figure 16 SPM tab

6.1 Search mask

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

The following search criteria are available:

- **Part-No**
Own part number of the item, for which the SPM request was created.
- **For item no**
Internal part number of the BOM.
Upon click on  button, a window for search for own MDS is opened. Upon selection of an MDS and search for SPM requests, all SPM requests existing for selected BOM are listed.



- **Supplier**

Company which the SPM request was addressed to.

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

- **from Org. unit**

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

- **MDS Type**

Type of the MDS:

- Component
- Semi Component
- Material

- **State**

State of the SPM request:

- Open requests
- Request inactive
- Request acquired
- IMDS supplier assigned
- IMDS supplier and contact person assigned
- Marked to send email
- Mail sent
- MDS request rejected by supplier
- MDS received
- Assigned MDS rejected
- Assigned MDS accepted

- **Request-Date**

Period of time in which the SPM was created.

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

- **Project**

The project which the item for which the SPM request was created is linked to.

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

- **Plant**

Manufacturing plant of the item for which the SPM request was created.

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

- **Requestor**

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

- **Sender**
Name of the user who sent the SPM request (using iPCA full name).
- **ID**
The ID of the SPM request.
- **Due date indicator**
An estimation, whether the SPM request can be accomplished until given due date:
 - All
 - Red
 - Yellow
 - Green
 - Grey
- **Requests**
Type of the request:
 - All
All kind of SPM requests will be shown in the result list
 - Only IMDS req.
Only SPM requests which were uploaded to the online IMDS system be shown in the result list
 - Only offline req.
Only SPM requests which were not uploaded to the online IMDS system be shown in the result list
- **Inactive too**
If this checkbox is checked, also inactive SPM requests will be shown in the result list.
- **Only incomplete**
If this checkbox is checked, only incomplete SPM requests will be shown in the result list
PLEASE NOTE: By default, this checkbox is checked upon opening the SPM search panel. The default value can be changed by the system administrator by setting the value of the configuration parameter “**SPM_SEARCH_DEFAULT_INCOMPLETE_ONLY**” to “**false**” (see **chapter 7.7** for more details).
- **Only deleted**
If this checkbox is checked, only deleted SPM requests will be shown in the result list.
- **Only suspended**
If this checkbox is checked, only SPM requests with suspended reminder will be shown in the result list.
- **Only prelim. MDS**
If this checkbox is checked, only SPM requests for prototype (preliminary MDS) will be shown in the result list.

- **Remark**
Remark of the SPM request.

Following actions are available:

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

6.2 Result list

The result list displays SPM requests as per defined search criteria. Each row represents one SPM request.

The following standard columns are available:

- **ID**
The ID of the SPM request.
- **Part Number**
Own part number set in the SPM request.
- **Description**
Value that is displayed can come from two different sources:
 - **SPM request without MDS assigned**
Value from the field “**Description**” in the SPM request.
 - **SPM request with MDS assigned**
Value from the field “**Customer Description**” in the “**Recipient Data**” tab in the received MDS.
- **IMDS-ID**
Value that is displayed depends on whether the MDS is assigned to the SPM request or not:
 - **SPM request without MDS assigned**
No value is displayed.
 - **SPM request with MDS assigned**
Value is the IMDS ID and version of the assigned received MDS.
- **Supplier**
Value that is displayed can come from two different sources:
 - **SPM request without MDS assigned**
Value from the field “**Supplier**” in the SPM request.
 - **SPM request with MDS assigned**
Value from the field “**MDS Supplier**” in the “**Ingredients - IMDS**” tab in the received MDS.

- **Supplier Code**

Value that is displayed can come from two different sources:

- **SPM request without MDS assigned**
Value from the field “**Supplier Code**” in the SPM request.
- **SPM request with MDS assigned**
Value from the field “**Supplier Code**” in the “**Recipient Data**” tab in the received MDS.

- **Supplier Site Code**

Value that is displayed can come from two different sources:

- **SPM request without MDS assigned**
Value from the field “**MDS Type:**” in the SPM request.
- **SPM request with MDS assigned**
Type of the MDS of the received MDS.

This column is shown only in case the SPM Supplier Site Code module is licensed.

- **Project**

The project set in the SPM request.

- **Plant**

The plant set in the SPM request.

- **State**

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

Following states are available:

Request status	Supplier / contact	Email status	MDS recipient status	Status
				Request inactive
				Request acquired
				IMDS supplier assigned
				IMDS supplier and contact person assigned
				Marked to send email
				Mail sent
				IMDS request rejected by supplier
				MDS received



Request status	Supplier / contact	Email status	MDS recipient status	Status
				Assigned MDS rejected
				Assigned MDS accepted

Table 1 List of possible SPM request statuses

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

- **Type**

Value that is displayed can come from two different sources:

- **SPM request without MDS assigned**

Value from the field “Supplier Site Code” in the SPM request.

- **SPM request with MDS assigned**

Value from the field “Supplier Site Code” in the “Recipient Data – Additional Data” tab in the received MDS.

- **Prelim. MDS**

Value that is displayed can come from two different sources:

- **SPM request without MDS assigned**

Value from the field “Request prelim. MDS:” in the SPM request.

- **SPM request with MDS assigned**

Value from the field “Preliminary MDS” in the “Ingredients – IMDS” tab in the received MDS.

- **Requested**

The date of creation of the SPM request.

- **Received**

Value that is displayed depends on whether the MDS is assigned to the SPM request or not:

- **SPM request without MDS assigned**

No value is displayed.

- SPM request with MDS assigned**
 The receive date of the received MDS.
- IMDS State**
 Status of the IMDS online request created for the SPM request.

Following symbols are available:

Symbol	Status
	Deleted
	New
	Sent
	Working
	Rejected
	Waiting for acceptance
	Completed

Table 2 List of possible IMDS state statuses

- Accepted**
 Value that is displayed depends on whether the MDS assigned to the SPM request is accepted or not:
 - MDS assigned to the SPM request is not rejected**
 No value is displayed.
 - MDS assigned to the SPM request is rejected**
 The date when assigned received MDS was accepted.
- Due-date**
 Due date set in the SPM request.
- Due date**
 Due date indicator for the SPM request.
 The due date indicator provides a hint whether a given deadline for a SPM request can be met or not.

Following symbols are available:

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

Table 3 List of due date indicator states

- **Suspended**
Information whether the SPM request (friendly) reminders are suspended or not.
- **Rejected**
Value that is displayed depends on whether the MDS assigned to the SPM request is rejected or not:
 - **MDS assigned to the SPM request is not rejected**
No value is displayed.
 - **MDS assigned to the SPM request is rejected**
The date when assigned received MDS was rejected.
- **Remark**
Remark set in the SPM request.
This column is by default hidden and if wished, it can be added to the user's search result configuration.
- **PDM System**
PDM System which is the source of the information used for creation of the SPM request.
This column is shown only in case the SPM ERP/PDM BOM Interface module is licensed.
- **PDM Client**
PDM Client which is the source of the information used for creation of the SPM request.
This column is shown only in case the SPM ERP/PDM BOM Interface module is licensed.
- **MNS**
Information if the SPM request is for multiple part numbers.
- **MDS MNS**
Information if the datasheet assigned to the SPM request is for multiple part numbers.

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

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

6.3 Actions

The following actions are available:

- **Edit / Show**
Loads SPM request form populated with details of selected SPM request in either edit or read-only mode (see **chapter 6.3.1**)
- **Copy**
Creates a new SPM request by copying a selected SPM request (see **chapter 6.3.2**)

- **Delete**
Deletes selected SPM request (see **chapter 6.3.3**)
- **History**
Opens history of the selected SPM request (see **chapter 6.3.4**)
- **Assign MDS**
Allows manual assignment of the MDS to the selected SPM request (see **chapter 6.3.5**)
- **MDS Details**
Loads MDS assigned to the selected SPM request (see **chapter 6.3.6**)
- **Send email**
Sends email to the contact person defined in the selected SPM request (see **chapter 6.3.7**)
- **Send Online Request**
Uploads selected SPM request to the supplier using online IMDS system (see **chapter 6.3.8**)
- **Delete Online Request**
Deletes selected SPM request from the online IMDS system (see **chapter 6.3.9**)

6.3.1 Edit / Show

Label and function of this button is interactive:

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

The recipient specific data could be changed only until the SPM request is sent.

Once all changes are done, SPM request can be saved using one of three save buttons.

In case the supplier and/or contact and/or email address are not defined in the SPM request, an error message (see **Figure 17**) is shown upon click on the button “**Save & Send Email**” or “**Save & Send Email/Online**”.



Figure 17 Error message shown on save of a SPM request

In case the email text is not defined in the SPM request, an error message (see **Figure 18**) is shown upon click on the button “**Save & Send Email**” or “**Save & Send Email/ Online**”.

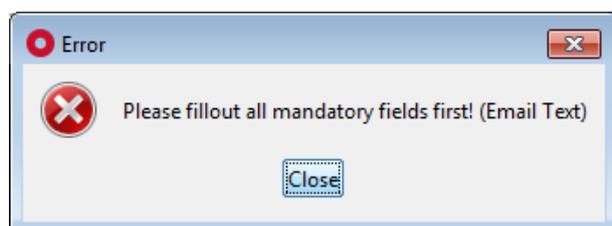


Figure 18 Error message shown on save of a SPM request

To cancel changes, click the “**Cancel**” button.

PLEASE NOTE: Only user with activated permission “**SPM_EDIT**” can edit SPM request.

6.3.2 Copy

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

On copy, following items compared to the original SPM request are changed or reset:

- **Due date**
Value is set to due date = SPM request creation date + Number of days for due date (defined in the “SPM Parameter” screen)
- **Suspend reminder**
Suspension of the reminder is completely removed

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

PLEASE NOTE: Only user with activated permission “**SPM_COPY**” can copy SPM request.

6.3.3 Delete

An existing SPM request can be deleted by click on the “**Delete**” button. This will bring up a small pop-up window (see **Figure 19**). By click on the “**Yes**” button a SPM request will be deleted. By click on the “**No**” button, the SPM request will be kept.

In case the SPM request was previously uploaded to the IMDS online system, the IMDS record is automatically deleted upon the deletion of the SPM request.

PLEASE NOTE: Only user with activated permission “**SPM_DELETE**” can delete SPM request.

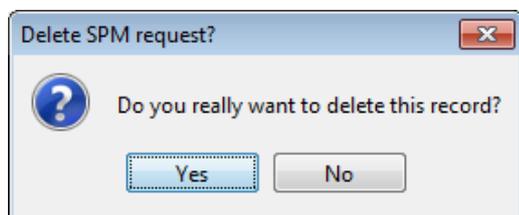


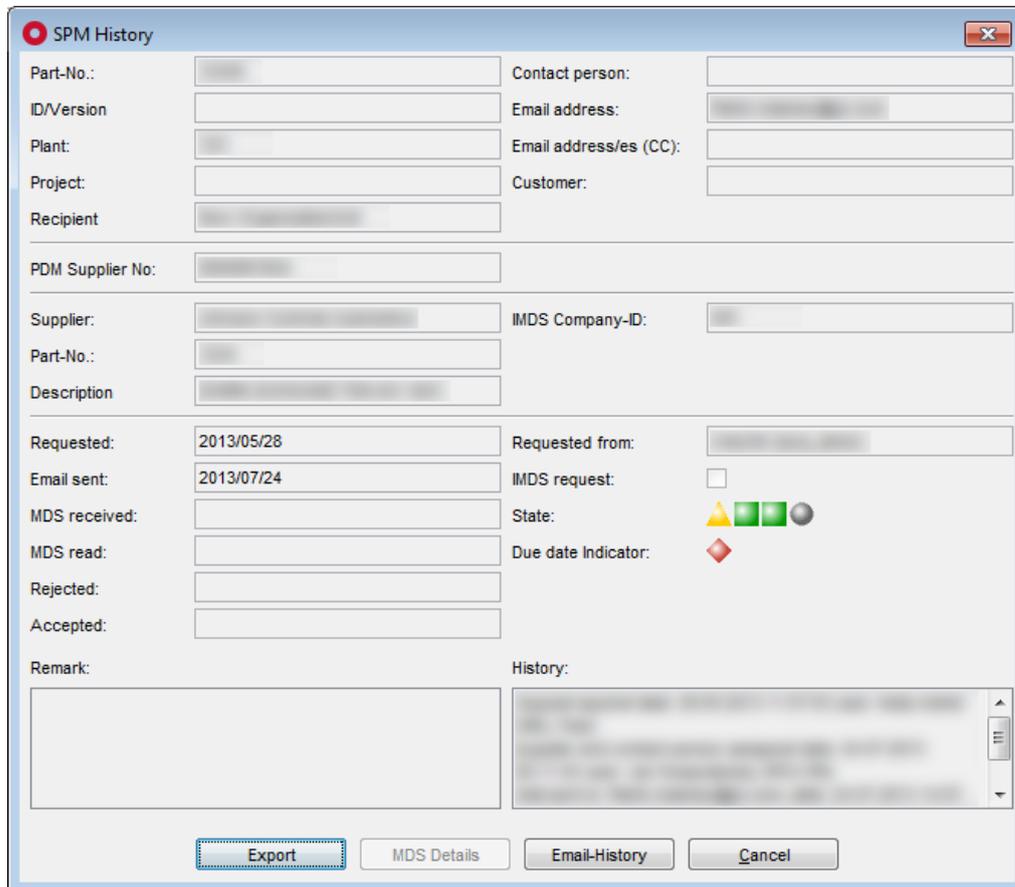
Figure 19 Confirmation of deletion of a SPM request

6.3.4 History

The detailed history of the selected SPM request can be seen by click on the “**History**” button. This loads a window populated with details of a SPM request (see **Figure 20**).

The following actions are available:

- **Export**
Exports the history window, e.g. to PDF format
- **MDS Details**
Loads MDS assigned to the SPM request
- **Email-History**
Opens history of all email sent for the SPM request
- **Cancel**
Closes the history window



The SPM History window contains the following fields and controls:

- Part-No.:** [Text field]
- ID/Version:** [Text field]
- Plant:** [Text field]
- Project:** [Text field]
- Recipient:** [Text field]
- Contact person:** [Text field]
- Email address:** [Text field]
- Email address/es (CC):** [Text field]
- Customer:** [Text field]
- PDM Supplier No.:** [Text field]
- Supplier:** [Text field]
- IMDS Company-ID:** [Text field]
- Part-No.:** [Text field]
- Description:** [Text field]
- Requested:** 2013/05/28 [Text field]
- Requested from:** [Text field]
- Email sent:** 2013/07/24 [Text field]
- IMDS request:**
- MDS received:** [Text field]
- State:** [Progress indicator: yellow triangle, green square, green square, grey circle]
- MDS read:** [Text field]
- Due date indicator:** [Red diamond]
- Rejected:** [Text field]
- Accepted:** [Text field]
- Remark:** [Text area]
- History:** [Text area]

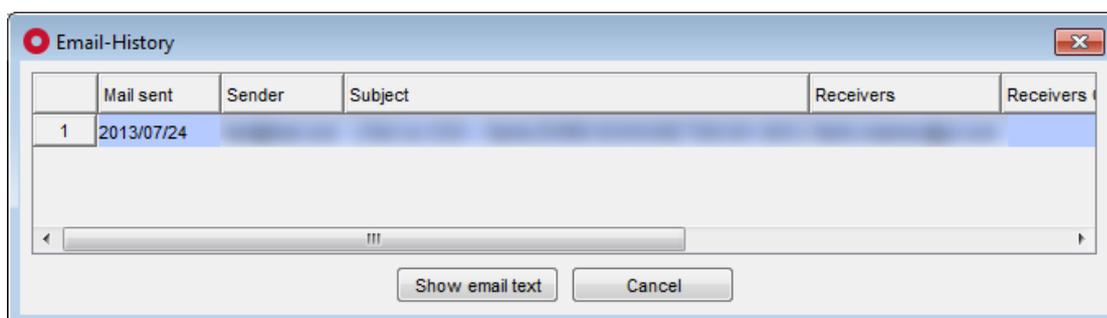
Buttons at the bottom: **Export**, **MDS Details**, **Email-History**, **Cancel**

Figure 20 SPM History window

6.3.4.1 Email history

The email history displays information about all emails sent for the SPM request (see **Figure 21**).

The details of the email can be seen by click on the “**Show email text**” button (see **Figure 22**).



	Mail sent	Sender	Subject	Receivers	Receivers
1	2013/07/24				

Buttons at the bottom: **Show email text**, **Cancel**

Figure 21 Email history window

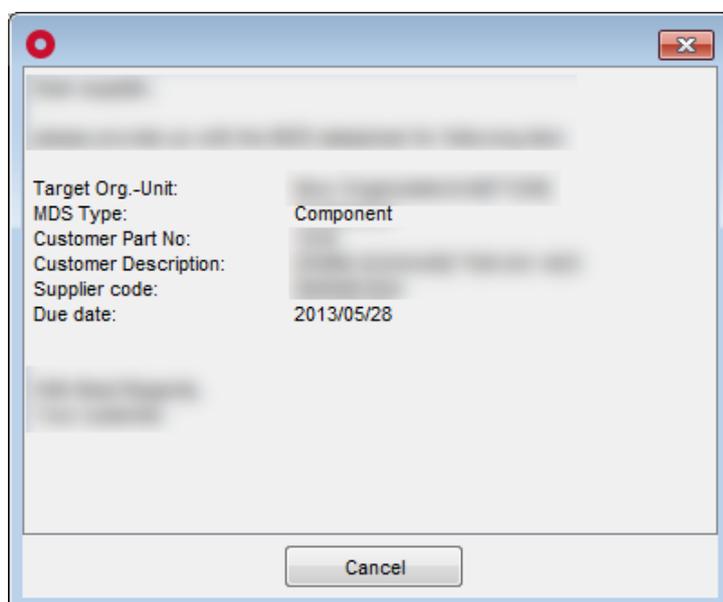


Figure 22 Details of the selected email

6.3.5 Assign MDS

The MDS can be manually assigned to the selected SPM request by click on the “**Assign MDS**” button. This loads a standard search window for received MDS with pre-selected type of the MDS according to the expected type of the MDS defined in the SPM request. The MDS can be changed if the MDS provided by the supplier is of different type than originally requested thus the MDS was not automatically matched with the SPM request. If the MDS is found, displayed and selected in the search result list, it can be assigned to the selected SPM request by click on the “**Apply**” button.

PLEASE NOTE: If an MDS was assigned to the selected SPM request, then

- The status of the SPM request will be changed according to the state of the selected MDS
- The recipient data of the SPM request will be changed to the selected MDS (if the request was not sent yet)
- The associated online IMDS request will be deleted (if created)
- The MDS type defined in the SPM request will be changed to the MDS type of assigned MDS (if MDS of different type than defined in the SPM request is chosen)

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

This button is active only in case the selected SPM does not have an MDS assigned to it yet.

In case that accepted MDS was assigned to the SPM request and the email notification about the SPM request closure is enabled (see **chapter 7.1.1.1** for more details), the email is created and send.

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

6.3.6 MDS Details

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

This button is active, if the selected SPM request haw an MDS assigned to it.

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

6.3.7 Send email

An email can be sent for an SPM request selected in the result table by click on the “**Send email**” button. This will send an email to the contact person defined in the SPM request. The email generated and send by this button is always an initial email for a selected SPM request (see **chapter 8.2** for more details). The email text can be modified using edit SPM function (see **chapter 6.3.1**).

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

This button is active in case the SPM request is in one of below states:

- IMDS supplier and contact person assigned
- Marked to send email
- Mail sent
- IMDS request rejected by supplier
- MDS received
- Assigned MDS rejected

PLEASE NOTE: This button can be inactivated for the SPM request in state “**IMDS supplier and contact person assigned**” to force the upload of the SPM request to the online IMDS system. For this, the value of the configuration parameter “**SPM_FORCE_ONLINE_REQUEST**” needs to be set to “**TRUE**” (see **chapter 7.7** for more details).

6.3.8 Send Online Request

An SPM request selected in the result table can be uploaded to online IMDS system by click on the “**Send Online Request**” button. If the upload of the request is successful, the checkbox “**IMDS request**” in the SPM request is checked.

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

This button is active in case the SPM request is in one of below states:

- IMDS supplier and contact person assigned
- Marked to send email (only in case of offline SPM request)
- Mail sent (only in case of offline SPM request)

PLEASE NOTE: Only user with activated permission “**SPM_IMDS_UPLOAD**” can upload SPM request to the online IMDS system.

6.3.9 Delete Online Request

An online IMDS request for an SPM request selected in the result table can be click on the “**Delete Online Request**” button. If the deletion of the request is successful, the state of the request is set to inactive.

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

This button is active only if the request has already been upload to online IMDS system.

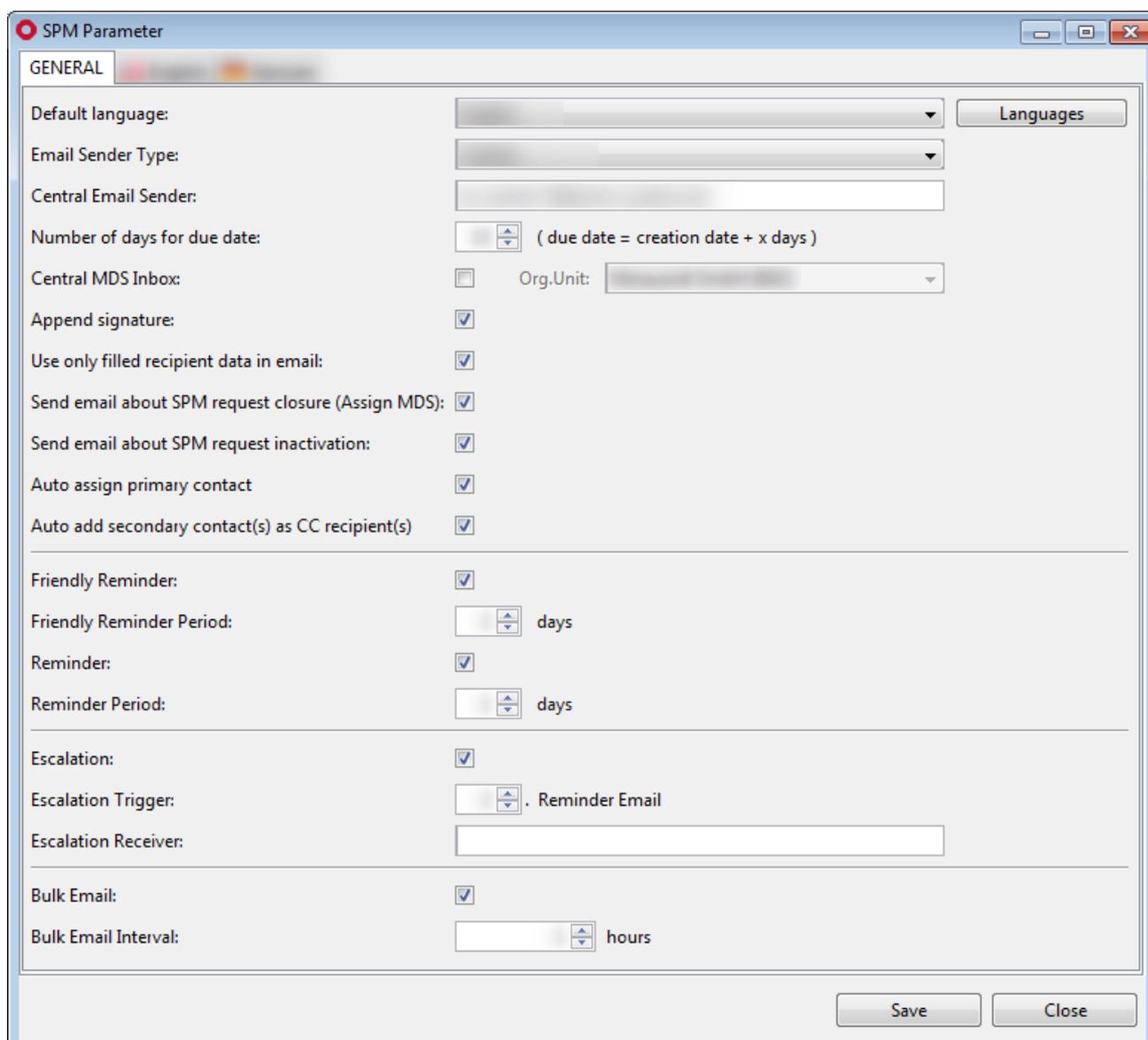
PLEASE NOTE: Only user with activated permission “**SPM_IMDS_UPLOAD**” can delete SPM request from the online IMDS system.

7 SPM configuration and master data

7.1 Parameters

7.1.1 SPM Parameter

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



The screenshot shows the "SPM Parameter" configuration window with the "GENERAL" tab selected. The window contains various settings for SPM configuration, including language, email sender, due date, reminders, and escalation. The settings are as follows:

- Default language: [Dropdown menu]
- Email Sender Type: [Dropdown menu]
- Central Email Sender: [Text input field]
- Number of days for due date: [Spin box] (due date = creation date + x days)
- Central MDS Inbox: Org.Unit: [Dropdown menu]
- Append signature:
- Use only filled recipient data in email:
- Send email about SPM request closure (Assign MDS):
- Send email about SPM request inactivation:
- Auto assign primary contact:
- Auto add secondary contact(s) as CC recipient(s):
- Friendly Reminder:
- Friendly Reminder Period: [Spin box] days
- Reminder:
- Reminder Period: [Spin box] days
- Escalation:
- Escalation Trigger: [Spin box] . Reminder Email
- Escalation Receiver: [Text input field]
- Bulk Email:
- Bulk Email Interval: [Spin box] hours

Buttons: Save, Close

Figure 23 SPM Parameters screen tab “GENERAL”

PLEASE NOTE: Only user with activated permission “**ADMIN_SPM**” can access SPM management.



The SPM Parameter screen consists of:

- General tab (see **chapter 7.1.1.1**)
- Language tabs (see **chapter 7.1.1.2**)

7.1.1.1 General tab

Following information must/could be defined:

- **Default language**
The default language, which is used for text of SPM emails.
Language can be chosen from the drop-down list, which contains all languages defined. For the management of the languages, please see **chapter 7.1.1.1.1**.
If no language is selected, text of SPM emails is in English.
- **Email Sender Type**
The email address, which is used for sending SPM emails in case the bulk email functionality is not activated.
This option is displayed only if the email sender type feature is licensed.
Email Sender Type can be chosen from the drop-down list, which contains following values:
 - Central
SPM emails are sent from the email address defined in “**Central Email Sender**” field
 - Plant
SPM emails are sent from the email address defined for the plant assigned to the SPM request
 - Requestor
SPM emails are sent from the email address of the user who created the SPM request
- **Central Email Sender**
The email address, which is used for sending of all SPM emails in case that “**Email Sender Type**” is set to “**Central**”.
This option is displayed only if the central email sender feature is licensed.
- **Number of days for due date**
Number of the days used for the calculation of the due date given to the supplier for sending the MDS for the item requested.
- **Central IMDS Inbox**
If the checkbox is checked, all newly created SPM request are automatically assigned to the particular own organization unit selected from the drop-down list. Otherwise any organization unit can be assigned to the newly created SPM request.
- **Append signature**
If the checkbox is checked and “**Email Sender Type**” is set to “**Requestor**” and user has a signature defined in his user profile, this signature will be appended to the SPM email. Otherwise standard company email footer is used.

- **Use only filled recipient data in email**
If the checkbox is checked, only those items in the SPM request, which contain any value (are defined) will be listed in the email text. Otherwise all items from the SPM request will be listed.
- **Send email about SPM request closure (Assign MDS)**
If the checkbox is checked, the email notification will be sent for each SPM request set to status “**Assigned MDS accepted**”.
- **Send email about SPM request inactivation**
If the checkbox is checked, the email notification will be sent for each SPM request set to status “**Request inactive**”.
- **Auto assign primary contact**
If the checkbox is checked and one contact of the selected supplier is marked as “**Primary Contact**” (see **chapter 7.6**) then this contact is automatically selected and entered upon selection of the supplier in the SPM request.
This option is displayed only if the SPM Contact Priority Module is licensed.
- **Auto add secondary contact(s) as CC recipient(s)**
If this checkbox is checked and at least one of the contacts of the selected supplier is marked as “**Secondary Contact**” (see **chapter 7.6**) then email address of this contact is automatically selected and entered upon selection of the supplier in the SPM request.
This option is displayed only if the SPM Contact Priority Module is licensed.
- **Friendly Reminder**
If the checkbox is checked, friendly reminder emails will be sent for each SPM request, for which the MDS was not provided by the supplier.
- **Friendly Reminder Period**
The amount of days after creation of the request when the friendly reminder email will start to be sent.
- **Reminder**
If the checkbox is checked, reminder emails will be sent for each SPM request, for which the MDS was not provided by the supplier.
- **Reminder Period**
The amount of days after passing the due date for the request when the reminder email will start to be sent.
- **Escalation**
If the checkbox is checked, an automatic escalation takes place as soon as specific number of reminder emails was sent for the particular SPM request.
This option is displayed only if the escalation feature is licensed.
- **Escalation Trigger**
Number of reminder emails sent before the escalation email is sent for the particular SPM request.

- **Escalation Receiver**

The email address, to which the escalation email will be send.

In case the SPM request is linked to the project with email address defined in the “**Email escalation**” field, this is used instead of the email address.

This option is displayed only if the bulk email feature is licensed.

- **Bulk Email**

If the checkbox is checked, SPM emails will be cumulated per contact into a single email.

- **Bulk Email Interval**

Period in hours defining how often the bulk SPM email will be sent.

7.1.1.1.1 Languages management

SPM supports multiple languages. This means that the SPM emails can be send in different languages based on the company preference, language of the supplier or language of their particular organization unit. Additionally, it is also possible to set a language just for the particular SPM request.

Default company language for SPM email can be defined in “**SPM Parameter**” screen. This language is used for all SPM emails and reminders unless different language is defined for:

- Company (see **chapter 7.2**)
- Organization Unit (see **chapter 7.2**)
- Particular SPM request (see **chapter 5.2.1.4**)

The “**Languages**” button in the “**SPM Parameter**” screen is used to manage languages for SPM emails. By click, the dialog window is opened (see **Figure 24**).

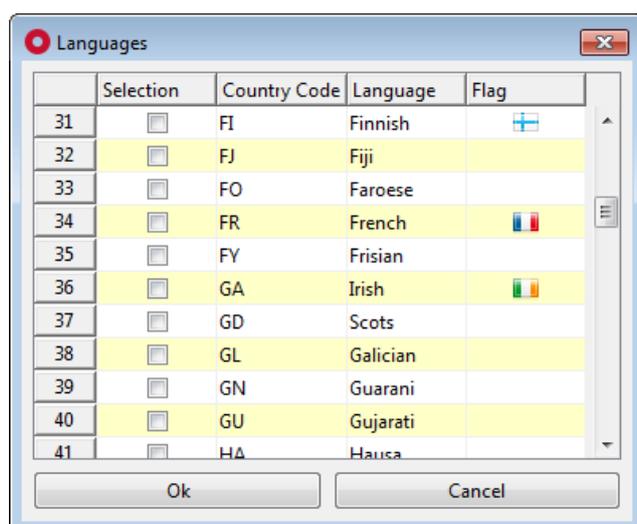


Figure 24 Languages dialog window

PLEASE NOTE: The SPM email is sent only in one particular language.

7.1.1.1.1.1 Addition of the new language

First, the checkbox in the first column must be checked for the selected language. This needs to be then confirmed by click on the “**Ok**” button.

This will add a new language tab in the “**SPM Parameters**” screen. For more details about content of the language tab, see **chapter 7.1.1.2**.

To confirm addition of the new language, changes must be saved by click on the “**Save**” button in the “**SPM Parameters**” screen.

7.1.1.1.1.2 Removal of the language

First, the checkbox in the first column must be checked for the selected language. This needs to be then confirmed by click on the “**Ok**” button.

This will remove the particular language tab from the “**SPM Parameters**” screen and also the language will be removed from each opened SPM request and will be set to none.

PLEASE NOTE: It is not possible to remove language, which is set as default for the SPM emails.

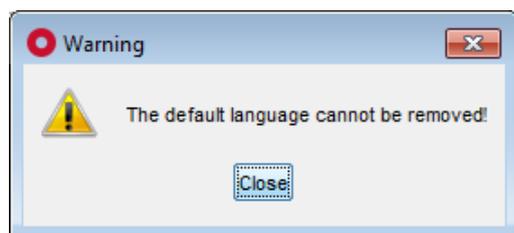


Figure 25 Notification to the user that default language cannot be removed

To confirm removal of the language, changes must be saved by click on the “**Save**” button in the “**SPM Parameters**” screen.

7.1.1.2 Language tabs

In the “**SPM Parameters**” screen, there is one language tab per added language.

Each language tab has the same fields for which the texts may be defined:

- Email texts
 - **Email Subject**
The subject of the SPM email.
 - **Closure Subject**
The subject of the SPM email sent when SPM request is set to status “**Assigned MDS accepted**”.
 - **Inactivation Subject**
The subject of the SPM email sent when SPM request is set to status “**Request inactive**”.

- **Email Header**
The header of the initial SPM email.
 - **Email Footer**
The footer of the SPM email.
 - **Friendly Reminder Header**
The header of the friendly reminder SPM email.
 - **Reminder Header**
The header of the reminder SPM email.
 - **Closure Header**
The header of the initial SPM email sent when SPM request is set to status “**Assigned MDS accepted**”.
 - **Inactivation Header**
The header of the initial SPM email sent when SPM request is set to status “**Request inactive**”.
 - **Escalation Header**
The header of the escalation SPM email.
This field is displayed only if the escalation feature is licensed.
 - **Bulk Email Header**
The header of the initial bulk SPM email.
 - **Bulk Friendly Reminder Email Header**
The header of the friendly reminder bulk SPM email.
 - **Bulk Reminder Email Header**
The header of the reminder bulk SPM email.
 - **Preliminary text**
The text informing supplier that the MDS needs to be send as preliminary MDS.
 - **Multi Numbers Text**
The text informing supplier that the SPM request applies also for other items.
- Recipient labels texts
 - **Send to Org.-Unit**
Own organization unit, to which the MDS needs to be send by the supplier.
 - **MDS Type**
Type of the MDS, which needs to be send by the supplier.
 - **Part-No**
Item number, which supplier needs to use for the MDS.

- **Description**
Description of the item, which supplier needs to use for the MDS.
- **Drawing No.**
The drawing number of the item.
- **Drawing dated**
The date of the drawing of the item.
- **Dr. change level**
The change level of the drawing of the item.
- **Due date**
The date until the supplier is supposed to send the MDS.
- **Report No.**
The number of the sample report of the item.
- **Date of Report**
The date of the sample report of the item.
- **Purchase Order No.**
The purchase order number of the item.
- **Bill of delivery No.**
Bill of delivery number of the item.
- **Supplier Code**
The supplier code of the supplier in the PDM/ERP system of the item.
- **Supplier Site Code**
The supplier site code of the supplier.
This column is shown only in case the SPM Supplier Site Code module is licensed.

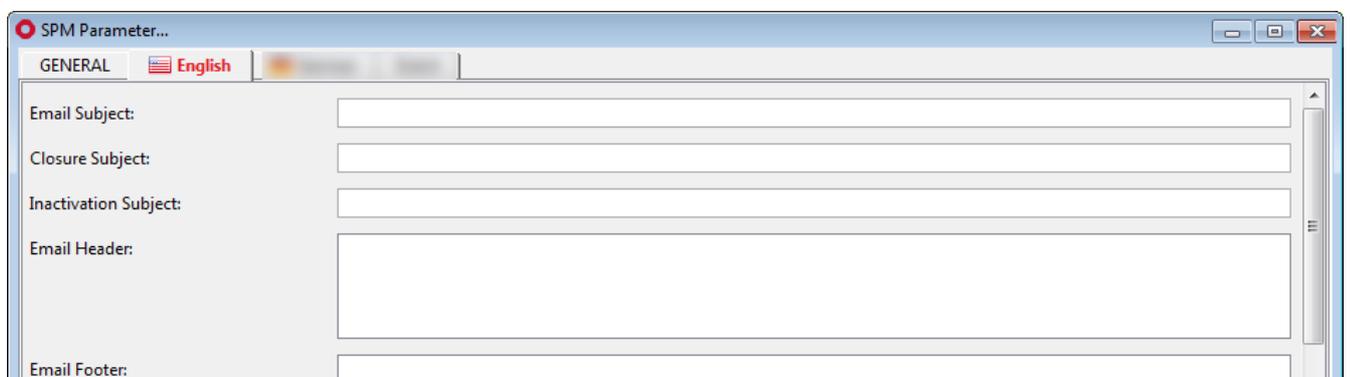


Figure 26 Language tab of the SPM Parameters screen

7.2 PDM/SPM Configuration

To manage the PDM SPM Interface configuration, panel for management needs be opened by navigation to the menu “**Options** → **Parameter** → **PDM Configuration**” and then the “**PDM/SPM Configuration**” tab needs to be activated.

PLEASE NOTE: This panel/tab is shown only in case the PDM SPM Interface module is licensed. Only user with activated permission “**ADMIN_SPM**” can manage the data in the PDM configuration parameter panel.

The panel is split into four areas:

1. Search panel (orange) - see **chapter 7.2.1.1**
2. Result list (blue) - see **chapter 7.2.1.2**
3. PDM SPM configuration details (green) - see **chapter 7.2.1.3**
4. Actions (black) - see **chapter**

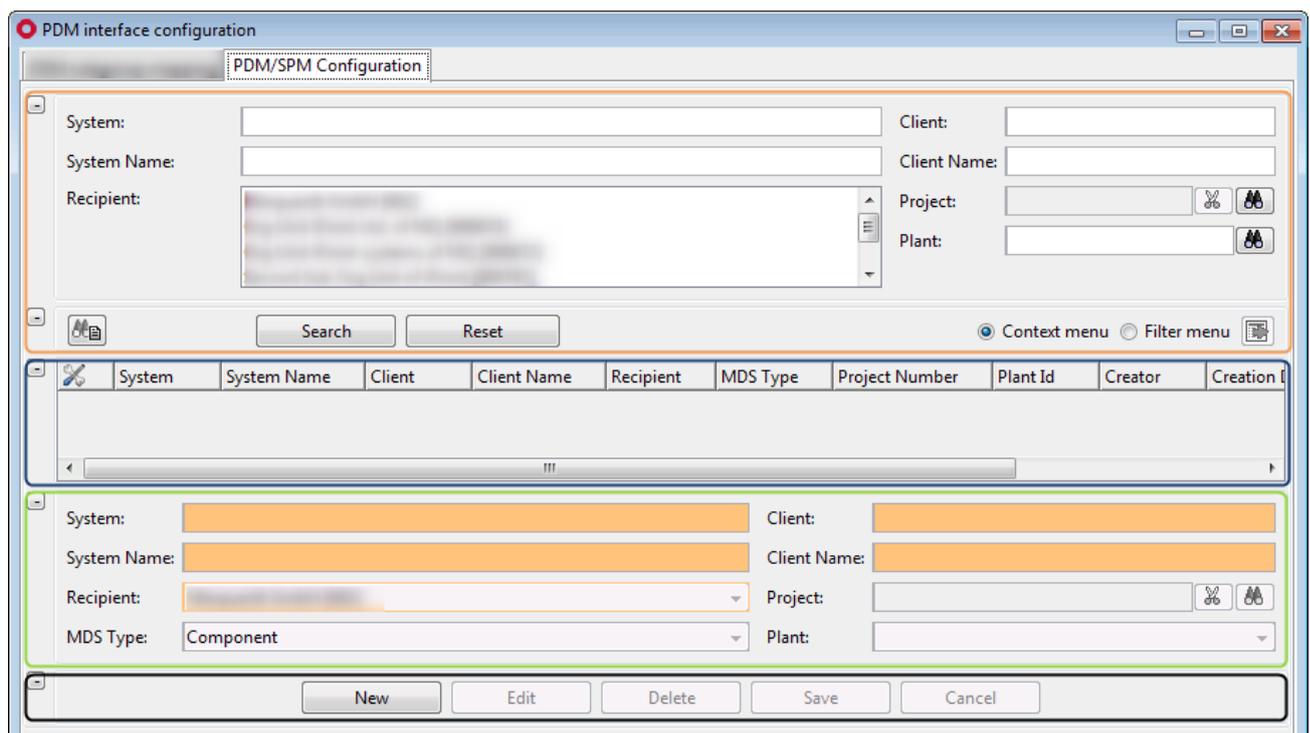


Figure 27 PDM interface configuration panel

7.2.1.1 Search mask

Enables to search for PDM SPM configuration based on defined search criteria.

The following search criteria are available:

- **System**
PDM system which is the source of the information used for creation of the SPM request.

- **System Name**
PDM system name which is the source of the information used for creation of the SPM request.
- **Recipient**
Recipient used for creation of the SPM request.
- **MDS Type**
MDS type used for creation of the SPM request.
MDS type can be chosen from the drop-down list, which contains following values:
 - Component
 - Semi Component
 - Material
- **Client**
PDM client which is the source of the information used for creation of the SPM request.
- **Client Name**
PDM client name which is the source of the information used for creation of the SPM request.
- **Project**
Project used for creation of the SPM request.
Project can be chosen using the  button, which will load standard project search window. Wished project can be then confirmed by click on the “**Apply**” button. Projects are managed in the “**Projects**” master data (see **chapter 7.4**).
- **Plant**
Plant used for creation of the SPM request.
Plant can be chosen from the drop-down list.
Plants are managed in the “**Plants**” master data (see **chapter 7.5**).

The following actions are available:

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

7.2.1.2 Result list

The result list displays PDM SPM configurations as per defined search criteria. Each row represents one configuration.

Upon selection of the PDM SPM configuration, all its details are displayed in the PDM SPM configuration details area below.

Following information is available:

- **System**
PDM system which is the source of the information used for creation of the SPM request.
- **System name**
PDM system name which is the source of the information used for creation of the SPM request.
- **Client**
PDM client which is the source of the information used for creation of the SPM request.
- **Client name**
PDM client name which is the source of the information used for creation of the SPM request.
- **Recipient**
Recipient used for creation of the SPM request.
- **MDS Type**
MDS type used for creation of the SPM request.
- **Project Number**
The project number used for creation of the SPM request.
- **Plant Id**
The plant ID used for creation of the SPM request.
- **Creator**
Name of the user who created the PDM SPM configuration (iPCA user name).
- **Creation Date**
The date of the creation of the PDM SPM configuration.
- **Last Editor**
Name of the user who last updated the PDM SPM configuration (iPCA user name).
- **Last Change**
The date when the PDM SPM configuration was last time changed by the user.

7.2.1.3 PDM SPM configuration details

Display the details of the selected PDM SPM configuration or allow definition of a PDM SPM configuration.

7.2.1.4 Actions

The following actions are available:

- **New**
Empties and activates fields in the details of PDM SPM configuration area and wished PDM SPM configuration can be defined (see **chapter 7.2.1.4.1**).

- **Edit**
Enables modification of the selected PDM SPM configuration (see **chapter 7.2.1.4.2**).
- **Delete**
Deletes selected PDM SPM configuration (see **chapter 7.2.1.4.3**).
- **Save**
Saves the new or updated PDM SPM configuration (see **chapter 7.2.1.4.4**).
- **Cancel**
Cancels the creation or edit of the PDM SPM configuration (see **chapter 7.2.1.4.5**).

7.2.1.4.1 New

New PDM SPM configuration can be created by click on the “**New**” button.

This activates the details of PDM SPM configuration.

Following information can be defined:

- **System**
PDM system which is the source of the information used for creation of the SPM request.
- **System Name**
PDM system name which is the source of the information used for creation of the SPM request.
- **Recipient**
Recipient used for creation of the SPM request.
Recipient can be chosen from the drop-down list, which contains all active IMDS organization units.
- **MDS Type**
MDS type used for creation of the SPM request.
MDS type can be chosen from the drop-down list, which contains following values:
 - Component
 - Semi Component
 - Material
- **Client**
PDM client which is the source of the information used for creation of the SPM request.
- **Client Name**
PDM client name which is the source of the information used for creation of the SPM request.
- **Project**
Project used for creation of the SPM request.
Project can be chosen using the  button, which will load standard project search window. Wished project can be then confirmed by click on the “**Apply**” button.

Projects are managed in the “**Projects**” master data (see **chapter 7.4**).

- **Plant**

Plant used for creation of the SPM request.

Plant can be chosen from the drop-down list.

Plants are managed in the “**Plants**” master data (see **chapter 7.5**).

PLEASE NOTE: In case that there is already defined PDM SPM configuration for defined system and client and error message is shown (see **Figure 28**) and the record is not saved.

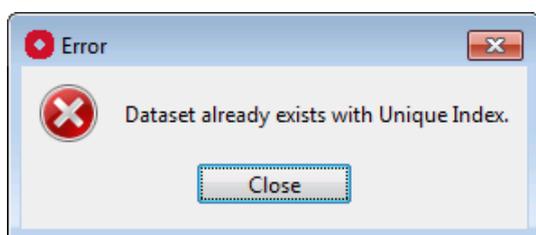


Figure 28 Error message if PDM SPM configuration already exists

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 31**).

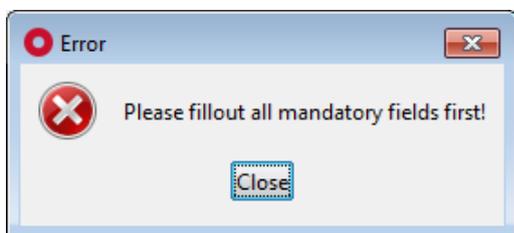


Figure 29 Error message shown on save of a PDM SPM configuration

7.2.1.4.2 Edit

The details of the selected PDM SPM configuration can be modified by click on the “**Edit**” button.

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

PLEASE NOTE: In case that there is already defined PDM SPM configuration for defined system and client and error message is shown (see **Figure 28**) and the record is not saved.

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

7.2.1.4.3 Delete

An existing PDM SPM configuration can be deleted upon its selection and click on the “**Delete**” button. This will bring up a small pop-up window (see **Figure 30**). By click on the “**Yes**” button the PDM SPM configuration will be deleted. By click on the “**No**” button, the PDM SPM configuration will be kept.

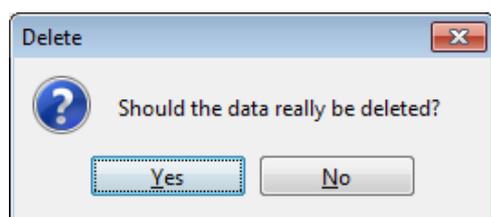


Figure 30 Confirmation of deletion of the PDM SPM configuration

7.2.1.4.4 Save

The button is active only in case the PDM SPM configuration is being created or edited.

By click on it new or updated PDM SPM configuration is saved.

PLEASE NOTE: In case that there is already defined PDM SPM configuration for defined system and client and error message is shown (see **Figure 28**) and the record is not saved.

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

7.2.1.4.5 Cancel

The button is active only in case the PDM SPM configuration is being created or edited.

By click on it creation or edit of the PDM SPM configuration is cancelled.

7.3 Communication language for company and organization units

A communication language can be defined on the company and/or on the organization unit level.

This language will be then used instead of the default language defined in the “**SPM Parameter**” screen.

If both, main company and organization unit have the language defined, the language used for the SPM email text will be the language defined for the organization unit.

To define a communication language, company master data in iPCA needs to be opened by navigation to the menu “**Extras → Master data → Companies / legal units / contacts**”. The required company needs to be searched and edited by its selection in the result list and click on the “**Edit**” button.

PLEASE NOTE: Only user with activated permission “**IHS_COMPANIES_MANAGEMENT_EDIT**” can manage communication language for company and/or organization unit.



7.3.1 Definition of a language for company / organization unit

Language for the correspondence can be defined using the  button in the field “**Communication language**” in “**Company data**” or in “**Organisation unit**” tab. This loads a dialog window with languages. Wished language can be then confirmed by click on the “**OK**” button.

PLEASE NOTE: In the dialog window with the languages, all existing, not only languages added in the “**SPM Parameter**” screen, are shown.

To save the language defined “**Save**” button must be used.

7.3.2 Removal of a language for company / organization unit

Language for the correspondence can be removed using the  button in the field “**Communication language**” in “**Company data**” or in “**Organisation unit**” tab.

This will cause that for the next SPM emails, the company language cannot be used anymore so that the emails will be send in the default SPM language.

PLEASE NOTE: In the dialog window with the languages, all existing, not only languages added in the “**SPM Parameter**” screen, are shown.

To save the language removed “**Save**” button must be used.

7.4 Projects Master Data

SPM request can be linked with the project.

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

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

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

1. Search mask (orange) – see **chapter 7.4.1**
2. Result list (blue) – see **chapter 7.4.2**
3. Project details (green) - see **chapter 7.4.3**
4. Actions (black) - see **chapter 7.4.4**

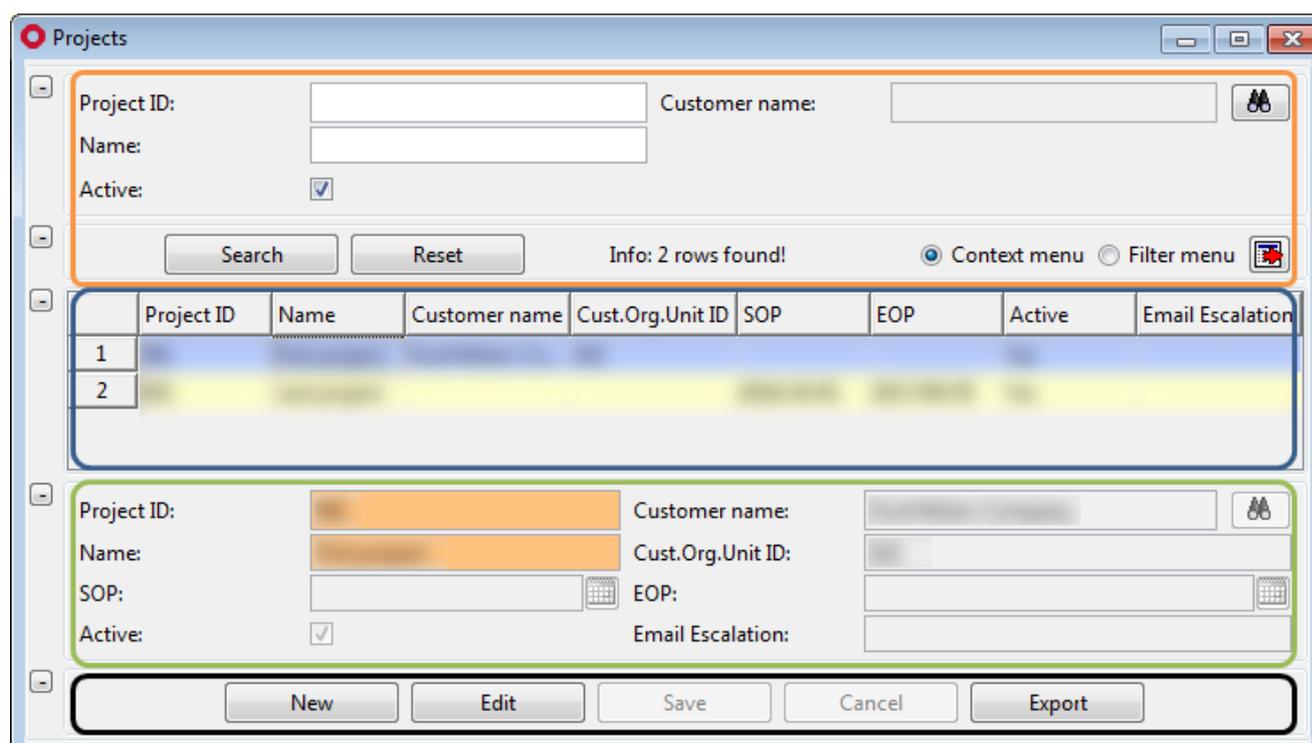


Figure 31 Projects management panel

7.4.1 Search mask

Enables to search for projects based on defined search criteria.

The following search criteria are available:

- **Project ID**
ID of the project.



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

The following actions are available:

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

7.4.2 Result list

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

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

7.4.3 Project details

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

7.4.4 Actions

The following actions are available:

- **New**
Empties and activates fields in the project details area and new details of the new project can be defined (see **chapter 7.4.4.1**).
- **Edit**
Activates fields in the project details and the details can be modified (see **chapter 7.4.4.2**).
- **Save**
Saves the new the project or changes in the project (see **chapter 7.4.4.3**).

- **Cancel**
Cancel the creation or edit of the project (see **chapter 7.4.4.4**).
- **Export**
Export the existing project (see **chapter 7.4.4.5**).

7.4.4.1 New

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

This activates the details of project.

Following information must/could be defined:

- **Project ID**
Unique ID of the project.
This field is mandatory.
- **Name**
Name of the project.
This field is mandatory.
- **SOP**
Start of production of the project.
- **Active**
Checkbox defining whether the project is active or not.
- **Customer name**
IMDS name of the customer.
Customer can be chosen using the  button, which will load standard company search window.
Wished customer can be then confirmed by click on the “**Apply**” button.
- **Cust.Org.Unit ID**
IMDS organization unit of the selected customer.
- **EOP**
End of production of the project.
- **Email Escalation**
Email address, which should be used for the escalation email instead of the default escalation email defined in the “**SPM Parameter**” screen.
For details about the escalation email, see **chapter 8.2.2**.

7.4.4.2 Edit

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

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

7.4.4.3 Save

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

By click on it new or updated project is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 32**).

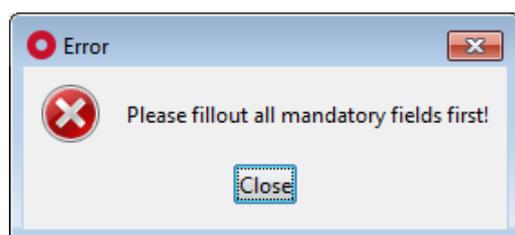


Figure 32 Error message shown on save of a project

7.4.4.4 Cancel

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

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

7.4.4.5 Export

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

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

7.5 Plants Master Data

SPM request can be linked with the plant.

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

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

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

1. Overview of plants (orange) - see **chapter 7.5.1**
2. Plant details (blue) - see **chapter 7.5.2**
3. Actions (green) - see **chapter 7.5.3**

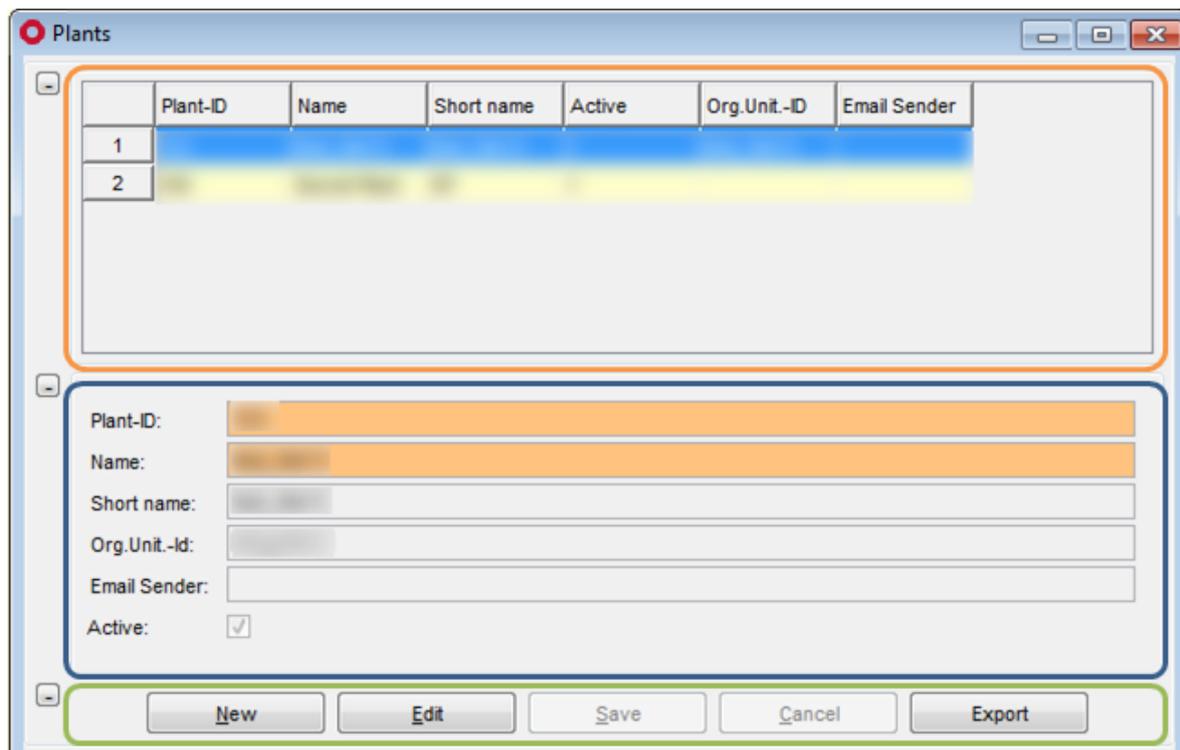


Figure 33 Plants management panel

7.5.1 Overview of plants

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

7.5.2 Plant details

Following information must/could be defined:

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

7.5.3 Actions

The following actions are available:

- **New**
Empties and activates fields in the plant details area and new details of the new plant can be defined (see **chapter 7.5.3.1**).
- **Edit**
Activates fields in the plant details and the details can be modified (see **chapter 7.5.3.2**).
PLEASE NOTE: Plant- ID cannot be changed
- **Save**
Saves the new the plant or changes in the plant (see **chapter 7.5.3.3**).
- **Cancel**
Cancel the creation or edit of the plant (see **chapter 7.5.3.4**).
- **Export**
Export the existing plants (see **chapter 7.5.3.5**).

7.5.3.1 New

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

This activates the details of plant.

Following information must/could be defined:

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

7.5.3.2 Edit

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

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

7.5.3.3 Save

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

By click on it new or updated plant is saved.

PLEASE NOTE: In case that the not all mandatory fields are populated an error message is shown (see **Figure 34**).

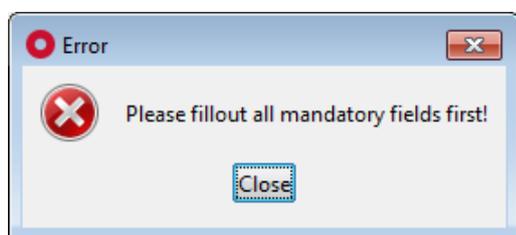


Figure 34 Error message shown on save of a plant

7.5.3.4 Cancel

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

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

7.5.3.5 Export

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

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

7.6 Configuration of primary and secondary contacts for supplier (optional)

Supplier contacts can be flagged either as primary (only one user) or secondary (multiple users).

These contacts can be then used for automatic selection of the contact and for automatic population of the CC email recipients for the SPM request emails.

To define primary and/or secondary contacts, company master data in iPCA needs to be opened by navigation to the menu “**Extras** → **Master data** → **Companies / legal units / contacts**”. The required company needs to be searched and edited by its selection in the result list and click on the “**Edit**” button.

PLEASE NOTE: Only user with activated permission “**IHS_CONTACT_MANAGEMENT_EDIT**” can manage flagging supplier contacts as primary or secondary.

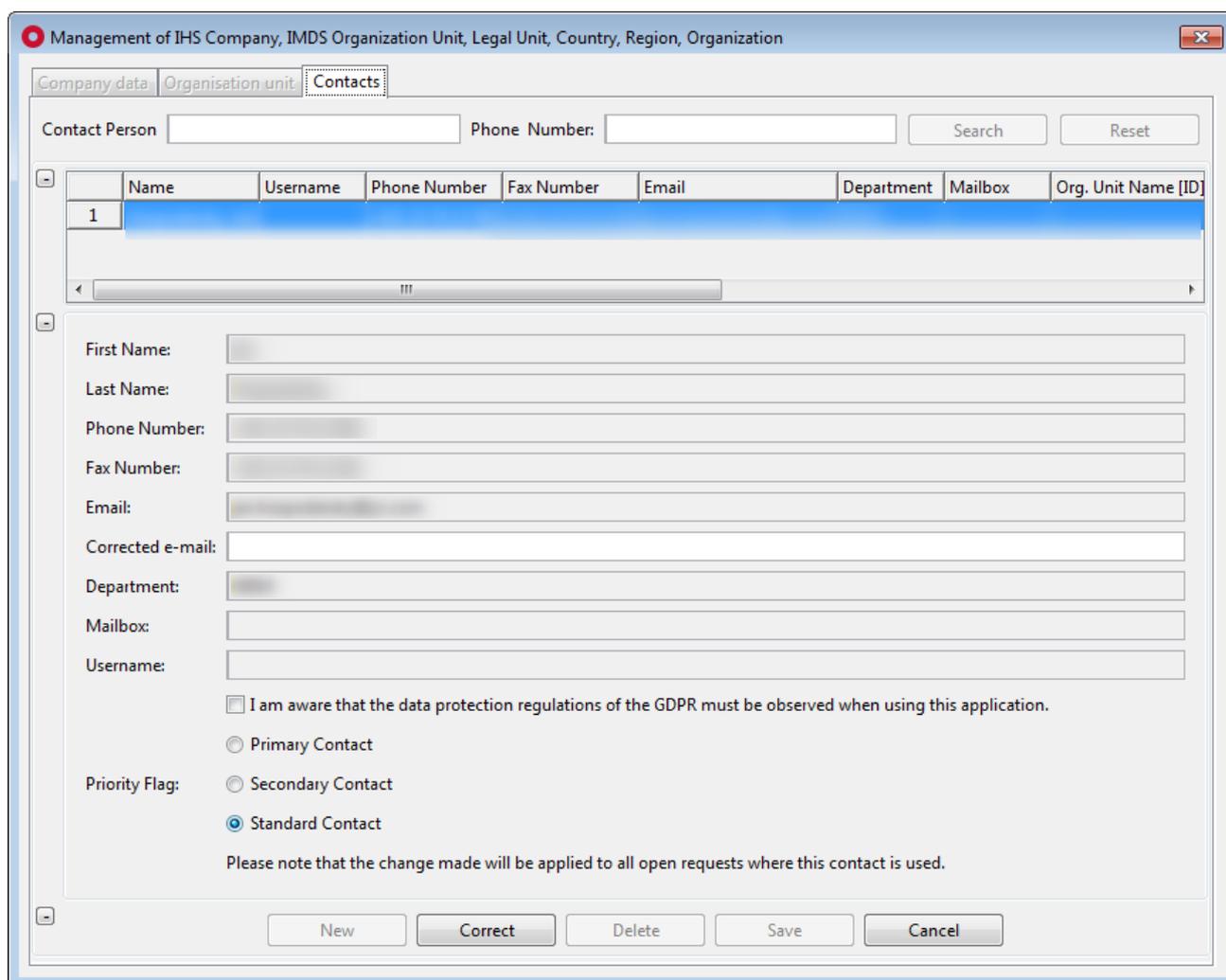


Figure 35 Contact tab in the Company management panel

7.7 Configuration parameters

To manage SPM configuration parameters, management panel needs be opened by navigation to the menu “Extras → Management” and “Configuration” tab needs to be activated.

Wished configuration parameter can be found easily by entering its name into the “Key” search field and click on the “Search” button.

Configuration parameter name	Supported values and their meaning	Comment
SPM_MDS_MATCHING_IGNORE_TYPE	Defines if the type of the datasheet set in the SPM request and type of the MDS must be the same to match both together or not:	See chapter 8.1



Configuration parameter name	Supported values and their meaning	Comment
	<ul style="list-style-type: none">• TRUE (the type of the datasheet set in the SPM request and type of the MDS must be the same to match both together)• FALSE (the type of the datasheet set in the SPM request and type of the MDS is ignored for matching) <p>Default value is FALSE.</p>	
SPM_MDS_MATCHING_PART_NUMBER_MANIPULATION	<p>Defines rules for part number manipulation from SPM request before the matching to MDS is done.</p> <p>Any valid and reasonable REGEXP expression can be defined as a value.</p> <p>Default value is <code>^.*</code> which means that no manipulation is done.</p> <p>And combinations which are separated by a semicolon.</p>	See chapter 8.1
SPM_MDS_MATCHING_USE_COMPLEX_PART_NUMBER_MATCH	<p>Defines if the SPM request - IMDS Datasheet matching is using part number wildcard approach or not:</p> <ul style="list-style-type: none">• TRUE (SPM request - IMDS Datasheet matching will be using complex part number manipulation)• FALSE (SPM request - IMDS Datasheet matching will not be using complex part number manipulation) <p>Default value is FALSE.</p>	See chapter 8.1
SPM_MDS_MATCHING_SUPPLIER_PREFIX	<p>Defines the prefix in the supplier code set in the recipient data page of the IMDS datasheet.</p> <p>Any value representing the prefix to be considered when matching can be defined as a value.</p> <p>Default value is <code>""</code>.</p>	See chapter 8.1
SPM_MDS_MATCHING_SUPPLIER_SUFFIX	<p>Defines the length of the suffix in the supplier code set in the recipient data page of the IMDS datasheet.</p>	See chapter 8.1



Configuration parameter name	Supported values and their meaning	Comment
	<p>Any number representing the length suffix to be considered when matching can be defined as a value.</p> <p>Default value is 0.</p>	
SPM_MDS_MATCHING_USE_COMPLEX_SUPPLIER_MATCH	<p>Defines if the supplier set in the SPM request and supplier of the MDS must be the same to match both together or not:</p> <ul style="list-style-type: none">• TRUE (SPM request - IMDS Datasheet matching will be using complex supplier matching)• FALSE (SPM request - IMDS Datasheet matching will not be using complex supplier matching) <p>Default value is FALSE.</p>	See chapter 8.1
SPM_FORCE_ONLINE_REQUEST	<p>Defines if the “Save & Send Email” button the SPM request and “Save email” button in the SPM panel are enabled or disabled in case the SPM request in state “IMDS supplier and contact person assigned” is loaded/selected:</p> <ul style="list-style-type: none">• TRUE (buttons are enabled in case the SPM request in state “IMDS supplier and contact person assigned” is loaded/selected)• FALSE (button is disabled in case the SPM request in state “IMDS supplier and contact person assigned” is loaded/selected) <p>Default value is FALSE.</p>	See chapter 5.2.3 and chapter 6.3.7
SPM_SEARCH_DEFAULT_INCOMPLETE_ONLY	<p>Defines if the “only incomplete” checkbox in the SPM search panel is checked by default or not:</p> <ul style="list-style-type: none">• TRUE (checkbox is checked by default)• FALSE (checkbox is unchecked by default) <p>Default value is TRUE.</p>	See chapter 6.1

8 SPM workflows

8.1 Matching with IMDS datasheet

After the daily download received IMDS datasheets can be automatically matched with opened SPM requests.

The criteria for automatic matching are as detailed below:

- **Part number in the IMDS datasheet and part number in the SPM request are the same**

This matching criterion cannot be deactivated, but the post-processing (or manipulation) of the part number in the IMDS datasheet before the matching is done can be activated by setting

 - the value of the configuration parameter SPM_MDS_MATCHING_USE_COMPLEX_PART_NUMBER_MATCH to TRUE (see **chapter 7.7** for more details).
 - and by setting the value of the configuration parameter SPM_MDS_MATCHING_PART_NUMBER_MANIPULATION (see **chapter 7.7** for more details) to any valid regular expression as per the requirements. For example, if this is set to value `^.{10}` then first 10 characters from the part number in the IMDS datasheet are considered for matching process.
- **Supplier of the IMDS datasheet and supplier in the SPM request are from the same company (not necessarily from the same organization unit)**

This matching criterion cannot be deactivated, but additional matching loop by using the supplier code can be activated by setting the value of the configuration parameter SPM_MDS_MATCHING_USE_COMPLEX_SUPPLIER_MATCH to TRUE (see **chapter 7.7** for more details).. Then it is checked if the supplier code set in the IMDS datasheet is also set for any company in iPCA (“**Supplier/Customer Codes**” field in the panel for management of the company). If yes, the IMDS datasheet is matched with open SPM request. Additionally, the post-processing (or manipulation) of the supplier code in the IMDS datasheet can be activated by setting

 - the value of the configuration parameter SPM_MDS_MATCHING_SUPPLIER_PREFIX (see **chapter 7.7** for more details) to any value as per the requirements. For example, if this is set to value `A1234` then this string is always cut from the supplier number in the IMDS datasheet, so it is not considered for matching process.
 - and/or the value of the configuration parameter SPM_MDS_MATCHING_SUPPLIER_SUFFIX (see **chapter 7.7** for more details) to any number as per the requirements. For example, if this is set to value `2` then last two characters are cut from the supplier number in the IMDS datasheet, so it is not considered for matching process.
- **Type of the IMDS datasheet and type in the SPM request are the same**

This matching criterion can be deactivated by setting the configuration parameter SPM_MDS_MATCHING_IGNORE_TYPE to value FALSE (see **chapter 7.7** for more details).

8.2 Emails for SPM requests

Communication of the SPM request to the suppliers is done mainly via email.

Depending on the configuration of the SPM and depending on the status of the SPM requests, the different types of emails can be sent.

8.2.1 Email grouping

Depending on the configuration an email for the SPM request(s) can be sent:

- **For a single SPM request**
One email is sent for each SPM request.
This email is sent by default.
- **For a group of SPM request**
One email is sent for group of SPM request(s) cumulated based on the recipient email address set in the SPM request and attached document(s) (if any).
This email is sent in case that a bulk email feature is enabled in the SPM Parameters panel by checking the “**Bulk Email**” checkbox.
This email is generated every n-hours (as per value set in the “**Bulk Email Interval**” field in the SPM Parameters panel).

8.2.2 Email types

Depending on the status and due date of the SPM request, activation status of individual email features and other variables, different types of emails can be sent for SPM request(s):

- **Initial email**
This email is sent upon click on the “**Save & Send Email**” or “**Save & Send Email/ Online**” buttons in the SPM request panel or by click on “**Send email**” button in the SPM search panel and its content is as per below tables.

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab extended with “ [Part no:x - Name:y]” where <ul style="list-style-type: none"> • x is value from “Part-No.” field from SPM request • y is value from “Description” field from SPM request
Body	Value from “ Email Header ” field from SPM parameters language tab. General submission details from SPM request. Recipient details from SPM request (all or only fields populated in SPM request, depending on the configuration of “ Use only filled recipient data in email ” setting in the SPM parameters general tab. Value from “ Email Footer ” field from SPM parameters language tab.



Email element	Source
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 4 Details of the initial SPM email (single)

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab
Body	Value from “ Bulk Email Header ” field from SPM parameters language tab. Value from “ Email Footer ” field from SPM parameters language tab. Attachment in XLSX file format listing details from all SPM requests included in the particular bulk email.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 5 Details of the initial SPM email (bulk)

• **Friendly reminder email**

This email is sent automatically in case that a friendly reminder feature is enabled in the SPM Parameters panel by checking the “**Friendly Reminder**” checkbox.

It is sent for the first-time **n-days** (as per value set in the “**Friendly Reminder Period**” field in the SPM Parameters panel) after the initial SPM email was sent for the request and is sent every **n-days** until the datasheet is received or until the due date set in the SPM request is reached.

Its content is as per below tables.

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab extended with “ [Part no:x - Name:y]” where <ul style="list-style-type: none"> x is value from “Part-No.” field from SPM request y is value from “Description” field from SPM request
Body	Value from “ Friendly Reminder Header ” field from SPM parameters language tab. Text of the last send email for the particular SPM request.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 6 Details of the friendly reminder SPM email (single)



Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab.
Body	Value from “ Bulk Friendly Reminder Email Header ” field from SPM parameters language tab. Text of the last send email for the particular SPM request.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 7 Details of the friendly reminder SPM email (bulk)

• **Reminder email**

This email is sent automatically in case that a reminder feature is enabled in the SPM Parameters panel by checking the “**Reminder**” checkbox.

It is sent for the first-time **n-days** (as per value set in the “**Reminder Period**” field in the SPM Parameters panel) after the due date set in the SPM request has passed and is sent every **n-days** until the datasheet is received or the request is cancelled, inactivated, deleted or the reminders are suspended in the SPM request.

Its content is as per below tables.

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab extended with “ [Part no:x - Name:y]” where <ul style="list-style-type: none"> x is value from “Part-No.” field from SPM request y is value from “Description” field from SPM request
Body	Value from “ Reminder Header ” field from SPM parameters language tab. Text of the last send email for the particular SPM request.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 8 Details of the reminder SPM email (single)

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab.
Body	Value from “ Bulk Reminder Email Header ” field from SPM parameters language tab. Text of the last send email for the particular SPM request.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 9 Details of the reminder SPM email (bulk)



• **Escation email**

This email is sent automatically in case that an escalation feature is enabled in the SPM Parameters panel by checking the “Escalation” checkbox.

It is sent only each time together with **n-th** (as per value set in the “Escalation Trigger” field in the SPM Parameters panel) reminder and is sent together with the reminder email every **n-days** until the datasheet is received or until the datasheet is received or the request is cancelled, inactivated, deleted or the reminders are suspended in the SPM request.

This email cannot be sent as a bulk email.

Its content is as per below table.

Email element	Source
Subject	Value from “ Email Subject ” field from SPM parameters language tab extended with “ [Part no:x - Name:y]” where <ul style="list-style-type: none"> • x is value from “Part-No.” field from SPM request • y is value from “Description” field from SPM request
Body	Value from “ Escalation Header ” field from SPM parameters language tab. Text of the last send email for the particular SPM request.
Recipient(s)	Depends on if the project is set for SPM request and if the project has the escalation receiver set or not: <ul style="list-style-type: none"> • SPM request without project or with project without escalation receiver set To: Value set in the “Escalation Receiver” field in the SPM Parameters panel Cc: None • SPM request with project with escalation receiver set To: Value set in the “Email Escalation:” field in the project linked to the SPM request Cc: None

Table 10 Details of the escalation SPM email (single)

• **Inactivation email**

This email is sent automatically in case that an inactivation email is enabled in the SPM Parameters panel by checking the “Send email about SPM request inactivation” checkbox.

It is sent only one time after the SPM request has been deactivated.

This email cannot be sent as a bulk email.

Its content is as per below table.

Email element	Source
Subject	Value from “ Inactivation Subject ” field from SPM parameters language tab y is
Body	Value from “ Inactivation Header ” field from SPM parameters language tab.



Email element	Source
	Value from “ Email Footer ” field from SPM parameters language tab.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 11 Details of the inactivation SPM email (single)

- **Closure email**

This email is sent automatically in case that a closure email is enabled in the SPM Parameters panel by checking the “**Send email about SPM request closure (Assign MDS):**” checkbox.

It is sent only one time after the SPM request has been closed (status changed to “**Assigned MDS accepted**”).

This email cannot be sent as a bulk email.

Its content is as per below table.

Email element	Source
Subject	Value from “ Closure Subject ” field from SPM parameters language tab y is
Body	Value from “ Closure Header ” field from SPM parameters language tab. Value from “ Email Footer ” field from SPM parameters language tab.
Recipient(s)	To: Value from “ Email address ” or “ Corrected Email ” field from the SPM request Cc: Value from “ Email address/es (CC) ” field from the SPM request

Table 12 Details of the closure SPM email (single)

8.3 Automatic update of contacts in open SPM requests

The SPM request is assigned to the contact, which the primary recipient of the email communication for the request. Its email address is set in the “**Email address**” field or in the “**Corrected Email**” field, depending on the type of the user and if its email address was adjusted internally in iPCA.

Optionally, the SPM request emails can be sent also to additional recipients set in the “**Email address/es (CC)**” field in the SPM request.

For SPM request, IMDS contacts as well as contacts created in iPCA (are of the type “**IHS**”), can be used.

These contacts can be modified or deleted. For more details see **Table 13** below.



Contact source	Possible actions
IMDS	In IMDS (reflected in iPCA via IMDS daily download) <ul style="list-style-type: none"> • Change (e.g. email address, last name, etc) • Delete In iPCA (via company & contact management) <ul style="list-style-type: none"> • Set value in the “Corrected e-mail” field • Set contact priority flag as (if the feature is licensed) <ul style="list-style-type: none"> ○ Primary contact ○ Secondary contact ○ Standard contact
IHS	In iPCA (via company & contact management) <ul style="list-style-type: none"> • Create • Change value in the “Email” field • Delete • Set contact priority flag as (if the feature is licensed) <ul style="list-style-type: none"> ○ Primary contact ○ Secondary contact ○ Standard contact

Table 13 List of possible actions on contacts

In case the IMDS or IHS contact is being edited in iPCA company & contact management, the notification is displayed informing user about the fact that the change made will be applied to all open requests where this contact is used (see **Figure 36**).

I am aware that the data protection regulations of the GDPR must be observed when using this application.

Priority Flag: Primary Contact

Secondary Contact

Standard Contact

Please note that the change made will be applied to all open requests where this contact is used.

Figure 36 Notification shown when editing the contact

In case the IHS contact is being deleted in iPCA company & contact management, the notification is displayed informing user about the fact that the change made will be applied to all open requests where this contact is used (see **Figure 37**).

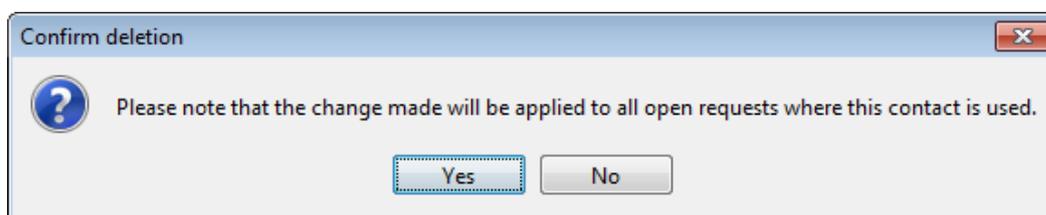


Figure 37 Notification shown when deleting the contact

It can happen that edited or deleted contact is used in an open SPM request, so the contact assignment in the SPM request needs to be updated. This update is done automatically by the background process that is started every 5 minutes and it follows the matrix details in the **Table 14** and **Table 15** below.

Change performed	Priority Flag	Action
IMDS –contact is deleted	Standard	If the email address is found in " Email address " field: <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are deleted the status of the SPM request is changed to "IMDS Supplier Assigned" If the email address is found " Email address/es (CC) " field: <ul style="list-style-type: none"> the email address in the "Email address/es (CC)" field is deleted the status of the SPM request is not changed
	Primary	The email address in the " Email address " field and contact assigned in the " Contact person " field are deleted. The status of the SPM request is changed to " IMDS Supplier Assigned ".
	Secondary	The email address in the " Email address/es (CC) " field is deleted. The status of the SPM request is not changed.
iPCA – contact's email address is changed	Standard	If the email address is found in " Email address " field: <ul style="list-style-type: none"> The email address in the "Email address" field is changed The status of the SPM request is not changed If the email address is found " Email address/es (CC) " field: <ul style="list-style-type: none"> The email address in the "Email address/es (CC)" field is changed The status of the SPM request is not changed
	Primary	The email address in the " Email address " field is changed. The status of the SPM request is not changed.
	Secondary	The email address in the " Email address/es (CC) " field is changed.



Change performed	Priority Flag	Action
		The status of the SPM request is not changed.
iPCA – Corrected email is set	Standard	<p>If the email address is found in "Email address" field:</p> <ul style="list-style-type: none"> The email address in the "Email address" field is changed The status of the SPM request is not changed <p>If the email address is found "Email address/es (CC)" field:</p> <ul style="list-style-type: none"> The email address in the "Email address/es (CC)" field is changed. The status of the SPM request is not changed.
	Primary	The email address in the " Email address " field is changed.
	Secondary	The email address in the " Email address/es (CC) " field is changed.
iPCA – Priority flag set to " Primary Contact "	Standard	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is inserted into the "Email address" field and contact is inserted into the "Contact person" field the status of the SPM request is changed to "IMDS Supplier and contact person assigned"
	Secondary	<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are changed the email address is removed from the "Email address/es (CC)" field The status of the SPM request is not changed
iPCA – Priority flag set to " Secondary Contact "	Standard	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is inserted into the "Email address/es (CC)" field the status of the SPM request is not changed
	Primary	<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are removed the email address is inserted into the "Email address/es (CC)" field in the SPM request the status of the SPM request is not changed
iPCA – Priority flag set to " Standard "	Primary	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the contacts are not changed the status of the SPM request is not changed



Change performed	Priority Flag	Action
Contact”		<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are removed the status of the SPM request is not changed
	Secondary	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is removed from the "Email address/es (CC)" field the status of the SPM request is not changed <p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is removed from the "Email address/es (CC)" field the status of the SPM request is not changed

Table 14 Matrix of SPM request updates triggered by IMDS contact changes

Change performed	Priority Flag	Action
iPCA –contact is deleted	Standard	<p>If the email address is found in "Email address" field:</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are deleted the status of the SPM request is changed to "IMDS Supplier Assigned" <p>If the email address is found "Email address/es (CC)" field:</p> <ul style="list-style-type: none"> the email address in the "Email address/es (CC)" field is deleted the status of the SPM request is not changed
	Primary	<p>The email address in the "Email address" field and contact assigned in the "Contact person" field are deleted.</p> <p>The status of the SPM request is changed to "IMDS Supplier Assigned".</p>
	Secondary	<p>The email address in the "Email address/es (CC)" field is deleted.</p> <p>The status of the SPM request is not changed.</p>
iPCA – contact’s email address is changed	Standard	<p>If the email address is found in "Email address" field:</p> <ul style="list-style-type: none"> The email address in the "Email address" field is changed The status of the SPM request is not changed <p>If the email address is found "Email address/es (CC)" field:</p> <ul style="list-style-type: none"> The email address in the "Email address/es (CC)" field is



Change performed	Priority Flag	Action
		<p>changed</p> <ul style="list-style-type: none"> The status of the SPM request is not changed
	Primary	<p>The email address in the "Email address" field is changed.</p> <p>The status of the SPM request is not changed.</p>
	Secondary	<p>The email address in the "Email address/es (CC)" field is changed.</p> <p>The status of the SPM request is not changed.</p>
iPCA – other contact’s detail is changed	Standard	No update is done.
	Primary	No update is done.
	Secondary	No update is done.
iPCA – Priority flag set to “ Primary Contact ”	Standard	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is inserted into the "Email address" field and contact is inserted into the "Contact person" field the status of the SPM request is changed to "IMDS Supplier and contact person assigned"
	Secondary	<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are changed the email address is removed from the "Email address/es (CC)" field The status of the SPM request is not changed
iPCA – Priority flag set to “ Secondary Contact ”	Standard	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address is inserted into the "Email address/es (CC)" field the status of the SPM request is not changed
	Primary	<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are removed the email address is inserted into the "Email address/es (CC)" field in the SPM request the status of the SPM request is not changed
iPCA – Priority flag set to “ Standard Contact ”	Primary	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the contacts are not changed the status of the SPM request is not changed
		<p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none"> the email address in the "Email address" field and contact assigned in the "Contact person" field are removed



Change performed	Priority Flag	Action
		<ul style="list-style-type: none">the status of the SPM request is not changed
	Secondary	<p>If the SPM request is in the status = "IMDS Supplier Assigned"</p> <ul style="list-style-type: none">the email address is removed from the "Email address/es (CC)" fieldthe status of the SPM request is not changed <p>If the SPM request is in the status > "IMDS Supplier Assigned"</p> <ul style="list-style-type: none">the email address is removed from the "Email address/es (CC)" fieldthe status of the SPM request is not changed

Table 15 Matrix of SPM request updates triggered by SAM-M contact changes

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11 Change History

Version	Date	Description
4.0	18.05.2006	Complete revision Added extension to Rel. 4.0 Introduction to change history
4.02.002	24.07.2006	Login screenshot changed
5.1	25.05.2007	New symbols for easier recognition of the different status for request status, due date and IMDS state Availability of the full functionality in iPCA/IHS
5.1.006	15.06.2007	Project specific email address for escalation
5.2	13.08.2007	More flexible email sender address
5.4	11.01.2007	New status "IMDS request rejected by supplier"
6.1	25.10.2008	New search criteria: ID, Requestor and Sender Part Number Check before save a new request Change to iPCA
7.5	15.10.2009	Changes for release 7.5
9.0	15.10.2012	Changes for release 9.0 Added MNS support
9.05	22.05.2013	Reworked SPM with multilanguage support, extended search mask, result list and modified SPM request form
9.09	02.08.2013	Complete rework of the user manual
10.12.000	11.07.2014	Minor updates and improvements of the text Some figures updated to match actual status
10.12.000	22.06.2015	Minor improvements and fixes of typos Migration of the user manual to new iPoint style
10.25.000	13.08.2015	Updated big number of figures (due to change of the iPoint logo in iPCA) Fixed some typos
11.00	21.09.2015	Updated some figures and text based on the change of the wording (Development sample report MDS -> Preliminary MDS)
11.00	12.02.2015	Added a hint about automatic deletion of the IMDS online request in case of deletion of SPM request which was uploaded to the IMDS online system (chapter 6.3.3)
11.07	23.02.2016	Modified status "Int. supplier assigned" to "IMDS supplier assigned" in Table 1 Added information about which attributes must be the same in the received MDS and SPM request in order to automatically to link them together Added details about new configuration parameter "SPM_FORCE_ONLINE_REQUEST" (chapter 5.2.3) Specified SPM request states when the buttons "Save & Send



Version	Date	Description
		Email” and “Save & Send Email/ Online” buttons are active (chapter 5.2.3) Added details about new configuration parameter “SPM_FORCE_ONLINE_REQUEST” and about SPM request states when the button “Send Email” is active (chapter 6.3.7) Specified SPM request states when the button “Send Online Req.” buttons is active (chapter 6.3.8) Modified status “Int. supplier assigned” to “IMDS supplier assigned” (chapter 6.1) Added reference to the notification email on SPM request closure (chapter 6.3.5) Updated Figure 22 to reflect addition of two new email events for SPM (chapter 7.1) Added precision about email address used as a sender of email in case the “Email Sender Type” is set to “Requestor” (chapter 7.1.1.1) Added description about two new email events for SPM request (chapter 7.1.1.1) Added description about new email configurations for two new email events for SPM request (chapter 7.1.1.2) Added note about possibility of export of result list to the XLSX format
11.11	29.06.2016	Updated Figure 1 (chapter 5.2) Updated Figure 7 and renamed “Supplier no.” to “Supplier Code” (chapter 5.2.1.3) Added the button name “Show” and details when this button label is displayed (chapters 6.3 and 6.3.1) Renamed “Supplier no.” to “Supplier Code” (chapter 7.1.1.2)
11.12	20.07.2016	Reordered subchapters in chapter 6.3 Improved and fixed the description for the “Show” button (chapter 6.3.1)
12.00	19.09.2016	Added details about possibility to assign MDS of different type than MDS type set in the SPM request (chapter 6.3.5) Completely reworked chapter 7.4
12.03	07.11.2016	Added information about logging activation of suspend reminder in the SPM request history (chapter 5.2.1.4) Updated Figure 23 (chapter 7.1) Improved descriptions for some of the items and descriptions of escalation and bulk email headers removed (chapter 7.1.1.1) Added descriptions of escalation and bulk email headers (chapter 7.1.1.2)
12.05	15.12.2016	Updated Figure 24 (chapter 7.1.1.1.1) Improved description in chapter 0 Improved description in chapter 7.1.1.1.2



Version	Date	Description
12.16	06.09.2017	Added details relevant for optional SPM Priority Contact Module (chapter 5.2.1.2) Added chapter 5.4 Updated permission name (chapter 7.2) Added chapter 7.6
12.19	16.08.2017	Updated Figure 23 (chapter 7.1) Added details of new checkboxes for control of automatic assignment of primary and secondary contact(s) (chapter 7.1.1.1)
13.00	15.12.2017	Bulk SPM email is now available to all SPM customers Updated Figure 16 and updated order of the search criteria accordingly (chapter 6.1) Changed “Language for correspondence” to “Communication language” (chapter 7.3.1) Changed “Language for correspondence” to “Communication language” (chapter 7.3.2) Updated Figure 35 (chapter 7.6)
13.22	08.10.2018	Updated Figure 1 (chapter 5.2) Updated Figure 8 (chapter 5.2.1.4) Updated Figure 23 (chapter 7.1) Added chapter 8
13.25	14.01.2019	Updated names of permissions required to access “Projects” master data panel (chapter 7.4) Updated names of permissions required to access “Projects” master data panel (chapter 7.5) Extended description of chapter 7.5.3.5
14.01	10.04.2019	Added “Remark” as a new search criterion (chapter 6.1) Updated Figure 16 (chapter 6)
14.03	28.05.2019	Added hint about usage of characters that are not allowed by the IMDS online system (chapter 5.2.1) Added details about the PDM SPM configuration parameter panel (chapter 7.2)
14.05	10.07.2019	Reworked and reduced chapter 4 Updated Figure 1 (chapter 5.2) Updated Figure 7 and added the “Supplier Site Code” field (chapter 5.2.1.3) Updated Figure 16 (chapter 6) Added description for all result columns (chapter 6.2) Added the “Supplier Site Code” field (chapter 7.1.1.2)