What has Changed?

Chuck LePard  October, 2013
INTRODUCTION AND BASICS
Why did IDMS Change?

• The IMDS Committee provided specifications for:
  – **IMDS NT - New Technology** System and application modernization (IMDS Release 8.0).
  – **IMDS 2020 Functionality Enhancements** Changes to operations (IMDS Release 9.0).
  – IMDS NT is in Production. IMDS 2020 is scheduled for Production by the end of 2014Q1.

• IMDS NT updates and modernizes the existing IMDS hardware, software and user interface to a more current and flexible architecture and infrastructure.

• IMDS 2020 makes significant changes in how IMDS operates, including changes to the functions a user performs, and changes to IMDS-AI and IMDS-A2.

• If the user interface and the system functionality both changed together, understanding and adapting to the changes would be more difficult.

• New IMDS Information Pages (formerly Public Pages) are being created/revised. The new pages are easier to navigate, and rollout is planned in October 2013.

• No one can stay on IMDS 7.2.
What is IMDS NT?

IMDS Release 8.0 (‘IMDS NT - New Technology’)

• A substantial modernization of IMDS in Release 8.0 (from IMDS Release 7.2).
• A substantial change in how IMDS looks and in how the User does things.
• Functionally there are minimal business changes, with little added or taken away.
• No change for users of the Advanced Interface (AI) & Advanced Accelerator (A2).
• Technologically, IMDS 8.0 is a noticeable improvement with greater potential.
• New and significantly improved Users Guide.
• Modernized Public Pages & Advanced Solutions pages with improved access to IMDS information.
The IMDS Classic home page is adequate.

As the first screen displayed to a user or potential user, it could be both more exciting and informative.

The IMDS NT home page is clean and informative.

The bright orange login catches the eye of the user.

Help is much better organized and easier to access.
Introduction and Basics

Logon Page

IMDS “Classic” 7.2

- Log on link displays a popup third log on screen.
- Users rarely read News content on way to log on.
- Documentation is available in English only.

IMDS “NT” 8.0

- Log on shares screen with News, increasing read time.
- Content is arranged in clear, easy to navigate panes.
- More content is displayed in a better organized fashion.
In-program Landing (First) Page

**IMDS “Classic” 7.2**

- The landing screen provides the main menu and the User Identifier.

**IMDS “NT” 8.0**

- The landing screen provides menus, User and Company Identifiers, MDS Module Search, and Search Results.
Menus

IMDS “Classic” 7.2

- Main and submenus appear in the same area.
- Main menu hides when submenus are displayed.
- The menu always consumes screen area.

IMDS “NT” 8.0

- Menus are always available and invalid options disable.
- Menus compact to top-level when not in use.
- Some options also appear on mouse right-click menus.

Introduction and Basics

Menus

- Main and submenus appear in the same area.
- Main menu hides when submenus are displayed.
- The menu always consumes screen area.
In both IMDS Classic and IMDS NT, Toolbar icons are always visible, and are enabled when function is available.
IMDS NT adds pull-down menus for choices such as New, the In Box, and the Out Box.
IMDS NT adds additional shortcuts for commonly used tasks such as the four types of searches.
The need for Preview is eliminated through “Search Results” windows on the same screens as search criteria.
View, Edit, Copy, and Paste, are moved to right mouse-click context-sensitive shortcuts.
The Print function has been replaced with added PDF reports and export functions, and is no longer available.
**Search Window Tips**

**IMDS “Classic” 7.2**
- In IMDS Classic, Search results display in pages.
- Previous and Next are used to view more.
- Searches are limited to 500 items.
- “Print” is usually used to generate an export.

**IMDS “NT” 8.0**
- In IMDS NT, Search results are scrollable.
- Position pointer between search & results to resize.
- High resolution display can show 50 items without scroll.
- Searches limited to 500 items. Export reports.
Search Results View Menu

Customize the Search Results display

- Search results columns can be customized using either the new “View” menu or with drag-and-drop or header clicks.
- Select View > Columns > and clear checks to hide columns, or restore checks or use “Show All” to restore columns.
- Click the ▲▼ in most column headers to sort the results ascending or descending by the selected column, or use View > Sort > Advanced to select up to three columns by which to sort.
- Select a Column header and drag the column left or right of another column to change the column order, or use View > Reorder Columns to rearrange the columns using a column list.
### Symbology

#### IMDS “Classic” 7.2
- Component
- Basic Substance
- Semicomponent
- Material

- IMDS established the symbols red cube, yellow sphere, two diagonal green spheres, and blue tetrahedron (pyramid) to represent Components, Semicomponents, Materials, and Basic Substances.

#### IMDS “NT” 8.0
- Component
- Semicomponent
- Material
- Basic Substance

- Owned (Created)
- Published
- Received (Supplier)

- IMDS NT continues and extends this symbol set with the House, Globe, and Envelope modifiers to represent Owned, Published, and Received items.
- Basic Substances never possess a modifier.

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11/21/2013 IMDS_NT_Changes.pptx - Comments based upon 2013_05_10 Model Office, and may differ in Production Release.
Introduction and Basics

Detail Screen Tips

IMDS “Classic” 7.2

- In IMDS Classic, details screen pane sizes are fixed.
- Tabs display additional information for a screen.
- Popup windows display sub-operation content, and sometimes hide useful main operation information.

IMDS “NT” 8.0

- In IMDS NT, pane sizes can be adjusted to suit display.
- Position pointer \( \leftrightarrow \) between tree & details to resize.
- “Trees” provide weight, percent, and extended symbols.
- Panes, e.g. Check collapse completely when not in use.
New Clipboard

- The New Clipboard can hold material datasheets, basic substances and requests for easy access.
- For example, drop or add an often used material into the Clipboard for reuse in different material datasheets.

- Open Clipboard from Menu Functions > Clipboard.
- If resolution and window size permit, appears at right.
- The clipboard is retained across IMDS sessions.
- You can reuse clipboard items repeatedly.
- Collapse or expand using the bottom left arrow.
- To remove an entry, right click and select remove.
- To remove all entries, use the top “Remove All” icon.
Copy... New Version & Copy... Copy

IMDS “Classic” 7.2

- Copy is a button on search results.
- Select item to copy, press Copy, popup is displayed.
- Select copy type – New Version, or New MDS.
- New MDS is sometimes referred to as “Copy... Copy”.

Introduction and Basics

IMDS “NT” 8.0

- Copy is a right-mouse-click option in search results.
- Select item to copy, right-mouse-click
- Select Copy... New Version, or New DataSheet.
- Unsupported Macs and tablets have no right-click.
# IMDS NT Key Migration Points

<table>
<thead>
<tr>
<th>IMDS “Classic” 7.2</th>
<th>IMDS “NT” 8.0</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Browser window is similar to a popup, without URLs, previous/next, tabs, etc.</td>
<td>• Normal browser window, yet back button produces errors. Do not use! Double-click and multi-click produce errors.</td>
</tr>
<tr>
<td>• Content may be viewed comfortably on a relatively low resolution display</td>
<td>• Designed for modern high resolution displays. Lower resolution displays may hide elements near bottom.</td>
</tr>
<tr>
<td>• A screen looks basically the same from one session to another.</td>
<td>• Pane sizes change based upon content, resolution and user adjustments.</td>
</tr>
<tr>
<td>• All user commands and functions are accessible from buttons, menus, or toolbars</td>
<td>• Copy/New Version Copy/New MDS only on right-click menu.</td>
</tr>
<tr>
<td>• Expanding and compressing a window makes very little change in the overall appearance.</td>
<td>• User has control of window and pane areas and compressions may result in awkward displays.</td>
</tr>
<tr>
<td>• User has only one view of each screen layout available.</td>
<td>• User may customize panes within a window, yet mechanism to restore settings may not be obvious.</td>
</tr>
<tr>
<td>• Toolbars are consistent in behavior, with all elements displayed when sufficient room.</td>
<td>• Toolbar may collapse to one or a few items, with additional items hidden in a ▶️ icon. This is better, &amp; being resolved.</td>
</tr>
<tr>
<td>• Copy and Paste work on individual fields</td>
<td>• New Clipboard much more capable, holding MDS structure and retaining even after logout, but only on certain items.</td>
</tr>
<tr>
<td>• In Recipient search, results always return both top-level companies and org units</td>
<td>• In Recipient search, new “root companies only” option allows excluding org units from search.</td>
</tr>
</tbody>
</table>
CREATE MATERIAL
Create Material

**IMDS “Classic” 7.2**

- From the main menu, select Create.
- From Create submenu, Select MDS.
- From the MDS type screen, Select Material.
- Select material classification, press Next.

**Setup**

**IMDS “NT” 8.0**

- On toolbar, select New ➔ Datasheet ➔ Material.
- Or menu, MDS ➔ New ➔ Datasheet ➔ Material.
- Note available keyboard shortcut alternative.
Select a Material Classification

IMDS “Classic” 7.2

- In the resulting popup select material classification.
- This choice can be changed later, but a change may result in skipping useful create process dialogues.
- Select Next.

IMDS “NT” 8.0

- In the resulting popup select material classification.
- This choice can be changed later, but a change may result in skipping useful create process dialogues.
- It may be necessary to scroll to see and select Apply.
Create Material Symbol

IMDS “Classic” 7.2

• Some classifications next display symbol creation.
• The symbol is optional now, but required for release.
• This dialogue provides direction on completion.
• Enter the required information, and press Next.

IMDS “NT” 8.0

• Some classifications next display symbol creation.
• The symbol is optional now, but required for release.
• This dialogue provides direction on completion.
• Enter the required information, and press Next.
Identify Material

**IMDS “Classic” 7.2**

- Enter at least the Name and Internal Mat. No., and other appropriate fields such as applicable norms.
- Optionally select toolbar Save, or Save button.

**IMDS “NT” 8.0**

- Enter at least the Name and Internal Mat. No., and other appropriate fields such as applicable norms.
- Note display of Tooltips with helpful field information.
- Optionally select toolbar Save, or Control-S.
Select Basic Substance

**IMDS “Classic” 7.2**
- Select “Add Basic Substance” from top right toolbar.
- Enter selection criteria and press Search.
- Select desired material and press Apply.
- To acknowledge multi-lingual warning, press OK.

**IMDS “NT” 8.0**
- Select “Add Basic Substance” from top middle toolbar.
- Enter selection criteria and press Search.
- Select desired material and double-click or Apply.
- To acknowledge multi-lingual warning, press OK.
Specify Substance Amount

**IMDS “Classic” 7.2**

- Substance is highlighted in tree below material.
- Operations in Detail apply to highlighted item in tree.
- Enter substance amount as range or fixed percentage.
- When substance added, save recommended.

**IMDS “NT” 8.0**

- Substance is highlighted in tree below material.
- Operations in Detail apply to highlighted item in tree.
- Enter substance amount as range or fixed percentage.
- When substance added, save recommended.
Add Remaining Substances

IMDS “Classic” 7.2

- Select Material in tree. Optionally Save.
- Repeat to add remaining substances to total 100%
- In this example, highly confidential Flame Retardant joker/wildcard. May not be declarable/prohibited.

IMDS “NT” 8.0

- Select Material in tree. Optionally Save.
- Repeat to add remaining substances to total 100%
- In this example, highly confidential Flame Retardant joker/wildcard. May not be declarable/prohibited.
Contact Person

IMDS “Classic” 7.2

- Next displays old Recyclate tab. Press Next again.
- On Supplier data tab, Select the contact person.
- Additional fields update automatically.
- Optionally press Save. Press Next.

IMDS “NT” 8.0

- Select Supplier data tab. Select the Contact person.
- Additional fields update automatically.
- Optionally select toolbar Save, or menu MDS ▾ Save.
- Select Recipient Data tab.
Check MDS

Check is available on most MDS create & edit screens.
- On Recipient data tab, select toolbar Check icon.
- Any issues are displayed in the resulting popup.
- Press Cancel to close the popup.

Check is available on most MDS create & edit screens.
- On Recipient data tab, select toolbar Check icon.
- Any issues are displayed in the lower window.
- Window can stay open, or close with X in top right.
Search for Recipient

IMDS “Classic” 7.2

- Select Add recipient (circled on Recipient toolbar).
- In the resulting popup, enter search criteria.
- Press search. Select recipient.
- Press Apply.

IMDS “NT” 8.0

- Select Add Recipient (circled on Recipient toolbar).
- In the resulting search window, enter search criteria.
- Select search, or press enter. Select Recipient.
- Double-click Recipient, or Select Apply.
Information for Recipient

IMDS “Classic” 7.2

- In the resulting popup, fill in the necessary fields, such as Internal Mat. No., name, and Supplier code.
- Select Change. Save recommended.
- Item is now ready to release, send, or propose

IMDS “NT” 8.0

- In the resulting details edit, fill in the necessary fields, such as Internal Mat. No., name, and Supplier code.
- Save recommended.
- Item is now ready to release, send, or propose
Send, Propose or Internally Release

IMDS “Classic” 7.2

IMDS “NT” 8.0

- Select an action based upon intended MDS use
- Actions run final check and show confirm popup
- Select confirm action button to complete MDS

- Send shares pre-released MDS with 1 customer
- Propose releases an MDS to 1 or more customers
- Internal makes MDS available in other owned MDSs
- Propose & Internal increment MDS whole version.

- Select an action based upon intended MDS use
- Actions run final check and show confirm popup
- Select confirm action button to complete MDS
Setup

IMDS “Classic” 7.2

- From the main menu, select Create.
- From the Create submenu, Select MDS.
- From the MDS type screen, Select Component.
- The Component Ingredients screen is displayed.

IMDS “NT” 8.0

- On toolbar, select New ➤ Datasheet ➤ Component.
- Or menu, MDS ➤ New ➤ Datasheet ➤ Component.
- The Component screen is displayed.
Identify Component

IMDS “Classic” 7.2

- Enter the Component Description, Part/Item No., Measured weight, and tolerance.

IMDS “NT” 8.0

- Enter the Component Description, Part/Item No., Measured weight, and tolerance.
- Select Supplier Data tab.
• Select Add Material button on Ingredients toolbar.
• In resulting popup, enter filter criteria such as: partial name, published by supplier IMDS Committee. Press Search, or Enter.

IMDS “Classic” 7.2
IMDS “NT” 8.0

• Select Add Material button on Ingredients toolbar.
• In resulting popup, enter filter criteria such as: partial name, Published by supplier IMDS Committee. Press Search, or Enter.
Select Material to Add

IMDS "Classic" 7.2

- Page through Results list to find material.
- If Results list too large, select “New Search” to redisplay search window and refine search criteria.
- Highlight desired material, and select Apply.

IMDS "NT" 8.0

- Scroll through Results list to find material (up to 500).
- If Result list too large, refine search criteria & re-search. (There is no need to exit current screen.)
- Highlight desired material, Double-click or select Apply.
Added Material Characteristics

**IMDS “Classic” 7.2**
- Enter the weight of the material in the component, and any other necessary information.
- Select the Recyclate tab, and enter the information.
- Return to Details. Select Component in Tree view (left).

**IMDS “NT” 8.0**
- Enter the weight of the material in the component, and any other necessary information.
- Scroll down if needed and enter Recyclate information.
- Select Component in Tree view (left).
• In this example, a copper coat is added to the steel.
• Note the use of recyclate, and presence of lead, requiring both the Recyclate and Application tabs.
• Optionally Save, then re-select top-level component.

• In IMDS NT, the Details, Recyclate, and Application are all displayed on the single Ingredients tab.
• Enter Recyclate and Application information.
• Optionally save, then re-select Component.
Select the Contact Person.
Additional fields update automatically.
Optionally press Save.
Press Next.

Select the Contact Person.
Additional fields update automatically.
Optionally select toolbar Save, or menu MDS ▼ Save.
Select Recipient Data tab.
Check MDS

**IMDS “Classic” 7.2**

- Check tool
- Check is available on most MDS create & edit screens.
- On Recipient data tab, select toolbar Check icon.
- Any issues are displayed in the resulting popup.
- Press Cancel to close the popup.

**IMDS “NT” 8.0**

- Check tool
- Check is available on most MDS create & edit screens.
- On Recipient data tab, select toolbar Check icon.
- Any issues are displayed in the lower window.
- Window can stay open, or close with X in top right.

Success!

Close check
Search for Recipient

IMDS “Classic” 7.2

- Select Add recipient.
- In the resulting popup, enter search criteria.
- Press search. Select recipient.
- Press Apply.

IMDS “NT” 8.0

- Select Add Recipient (circled on Recipient toolbar).
- In the resulting search window, enter search criteria.
- Select search, or press enter. Select Recipient.
- Double-click Recipient, or Select Apply.

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Create Component – Recipient

Information for Recipient

IMDS “Classic” 7.2

IMDS “NT” 8.0

• In the resulting popup, fill in the necessary fields.
• Select Change.
• Recommend: Select Save

• In the resulting details edit, fill in the necessary fields.
• Recommend: Select toolbar Save, or menu MDS ➤ Save.
Send, Propose or Internally Release

IMDS “Classic” 7.2

- Select an action based upon intended MDS use
- Actions run final check and show confirm popup
- Select confirm action button to complete MDS

IMDS “NT” 8.0

- Select an action based upon intended MDS use
- Actions run final check and show confirm popup
- Select confirm action button to complete MDS

- Send shares pre-released MDS with 1 customer
- Propose releases an MDS to 1 or more customers
- Internal makes MDS available in other owned MDSs
- Propose & Internal increment MDS whole version.
Propose an MDS

IMDS “Classic” 7.2

- Select propose to release MDS & notify customer.
- IMDS runs final check and shows confirm popup.
- Select Propose action button to complete.

IMDS “NT” 8.0

- Select propose to release MDS & notify customer.
- IMDS runs final check and shows confirm popup.
- Select Propose action button to complete.
INBOX AND OUTBOX
Outgoing Search

IMDS “Classic” 7.2

- From Main Menu, select Sent.
- Specify filters such as date sent, and/or Recipients.
- Press Search to execute.

IMDS “NT” 8.0

- From Functions menu or toolbar, select Outbox... MDS.
- Specify filters such as date sent, and/or Recipients.
- Press Search to execute.
Outgoing Results

IMDS “Classic” 7.2

- Results shown in sent items search results
- Status according to Status Description.

IMDS “NT” 8.0

- Results shown in Outbox search results
- Status no longer uses abbreviations.
Incoming Search

**IMDS “Classic” 7.2**

- {as Customer} From Main Menu, select Received.
- Specify filters such as transmitted date, Supplier(s).
- Press Search to execute.

**IMDS “NT” 8.0**

- From Functions menu or toolbar, select InBox... MDS.
- Specify filters such as date sent, and/or Supplier(s).
- Press Search to execute.
Incoming Results

IMDS “Classic” 7.2

- Results shown in received items search results
- Status according to Status Description.
- Select View to review MDS Content

IMDS “NT” 8.0

- Results shown in Outbox search results
- Status no longer uses abbreviations.
- Double-click, or right-click... View to review MDS content.
Incoming Review

IMDS “Classic” 7.2
- Review MDS tabs, perform check, & validate.
- When complete, use button to return to Search Result
- Results displays new options to Accept or Reject MDS.

IMDS “NT” 8.0
- Review MDS tabs, perform check, & validate.
Incoming Accept / Reject

### IMDS “Classic” 7.2
- Optionally Analyze or set internal Follow-up email.
- Follow-up emails sent to all in company subscribed.
- Accept or Reject the MDS.

### IMDS “NT” 8.0
- Accept and Reject are performed from the Details page.
- Accept and Reject are available from the MDS Menu.
- Accept or Reject the MDS.

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If MDs is rejected, you must supply the reason.
The reject reason entered is displayed to the supplier.
This is their basis for corrections; please be explicit.

If MDS is rejected, you must supply the reason.
The reject reason entered is provided to the supplier.
This is their basis for corrections; please be explicit.
ADMINISTRATION
Personal Settings

IMDS “Classic” 7.2

- Display using the main menu Settings option.
- Maintain name, email, phone, subscribe.
- Company Administrator ID in lower right.

IMDS “NT” 8.0

- Use Administration... Personal Settings or Ctrl+U.
- Maintain name, email, phone, subscribe.
- Popup screen - does not disturb action in process.
Company (CA)

IMDS “Classic” 7.2

- Org Units on left, Company info on right.
- CA cannot change Company Name.
- Publish rights and Expiry range are set here.
- One screen for view and edit (i.e., no View screen)

IMDS “NT” 8.0

- Separate View and Edit screen (View is default!)
- Org Units shown on left, Company info on right.
- Publish rights and Expiry range are set here.
- Users viewable, and manage Org Unit Users!
Contact Person (CA)

IMDS “Classic” 7.2
- IMDS Contacts provide Supplier dropdown list.
- Cannot delete, but may inactivate in modify.

IMDS “NT” 8.0
- IMDS Contacts provide Supplier dropdown list.
- Cannot delete, but may inactivate in modify.
User Create – Search (CA)

IMDS “Classic” 7.2

- Search filters in top, results below. Create in middle.
- View or modify to access user information
- This is the mechanism to access Valid Until dates

IMDS “NT” 8.0

- Search filters in top, results below. Create in middle.
- Modify is default user information action.
- This is the mechanism to access Valid Until dates
User Create – Detail (CA)

IMDS “Classic” 7.2

- User ID is not modifiable.
- Usually, cannot delete, but can make inactive.
- Maintain Valid as of and Valid until here.
- Name and email must be correct for support.

Reset PW

Valid Until

IMDS “NT” 8.0

- Reset PW is in bottom right.
- Usually, cannot delete, but can make inactive.
- Maintain Valid as of and Valid until here.
- Name and email must be correct for support.