DXC.technology

IMDS Company Merge User Guide

Version 6.0

Content

Introduction

Since Organization Units were introduced in IMDS, the Service Centers (Helpdesks) have received many inquiries regarding the reorganization of existing company registrations. Most of the cases refer to joining several separate IMDS company registrations into one main company either with or without subdivisions (Organization Units) representing the previously separate IMDS companies). Due to the numerous requests which require a developer to access the database (an effort not paid for by the OEMs on behalf of suppliers), DXC Technology (DXC) has developed a service for companies wishing to merge their separate IMDS companies for easier administration. The Company Merge Planner standardizes the procedure for these requests allowing it to be offered on a fixed price basis.

A reorganization requires active involvement of an IMDS user with a company administrator profile in the requesting company/companies for clarification of any questions the developer may have during preparatory work. Additionally, in order to avoid errors, and for security reasons, we usually require that the company administrator pre-defines the target company structure and creates new users. Experience has shown that communication overhead and potential errors (e.g. wrong name/address of the target organization unit) can be avoided if the company administrator performs these actions. Active involvement of the person knowledgeable about the structure and action (e.g. a company administrator) is the fastest and most economical way to reach the final company setup in IMDS.

If your company wishes additional activities (e.g. moving data sheets within a company or merging more than 20 companies) or tasks not covered by this Company Merge Planner, please define as detailed as possible your request and send to mds-solutions@dxc.com and DXC will prepare a customized offer for you. Please understand that there would be additional cost that is not covered by the standardized offers.

Please read carefully the instructions and example below and follow the defined process.

Thank you for your cooperation.

Note: Information about creating company structures and user administration can be found in the IMDS Information Pages – FAQs (https://public.mdsystem.com/web/imds-public-pages/faq).

Company Merge Frequently Asked Questions (FAQs)

We have detailed some common questions users asked in the following paragraphs.

Can the original IMDS Company ID be kept?

It depends. You may keep one "roof ID" as the target ID if merging several companies together. However, in general, it is not possible to use as target Roof ID or Org Unit ID any Roof IDs or OrgUnit IDs of the source company. The "roof" company is the top level in the IMDS Company.

How does the Company Merge work?

DXC moves **users**, **contact persons** and **material data sheets** from one Company/Orgunit to another Company/Orgunit including sent and received data sheets. This means ALL the users, contact persons and material data sheets. If only a portion of the data is to be moved, it is considered a company split-off and covered under a different service.

To ensure accuracy, the company planner requires the company IDs and orgunit IDs be used in addition to the company/organization unit names.

Users, contacts and material data sheets are moved according to the Company Planner. Usually if a material data sheet (e.g. the same MDS ID/Version) has been received by more than one source company that is planned to merge, the material data sheet will be assigned to the target orgunit or "roof" company depending on the merge sequence if not already present. The company administrator may assign these material data sheets to the responsible organization unit at a later time. To clarify issues as they arise, DXC needs the contact person named in the Company Merge Planner to be available during the move process.

After completion the source Company/Orgunit will be deleted.

Additionally, we recommend to prevent future online registrations by employees who have not been communicated with that you request that certain names related to your company be added to the "deny list". For example if DXC is on the deny list, no one can register online with the character string "DXC" in the company name.

Please make sure, that all companies listed in your planner belong to you and that representatives of these companies are informed. <u>We strongly recommend not merging IMDS companies that represent joint ventures.</u> It is the responsibility of the person requesting the merge to communicate with all users about the merge. We suggest using the Administration > Trust User and Administration > User options to find the users in your companies. (Administration > Trust User will return users in other IMDS companies that what you are logged into and Administration > User will return users in the company you are logged into.)

How to Fill Out the Company Merge Planner

The following section details how to fill out the Company Merge Planner.

Preliminary Work

The company administrator first needs to define the target company structure. The company administrator may add to the structure of an existing IMDS company or create a new target company through online registration (or manual registration if there are issues). If desired, Organization Units (Org Units) can be added as depicted in the following figure by selecting the + button similar to creating an MDS structure:
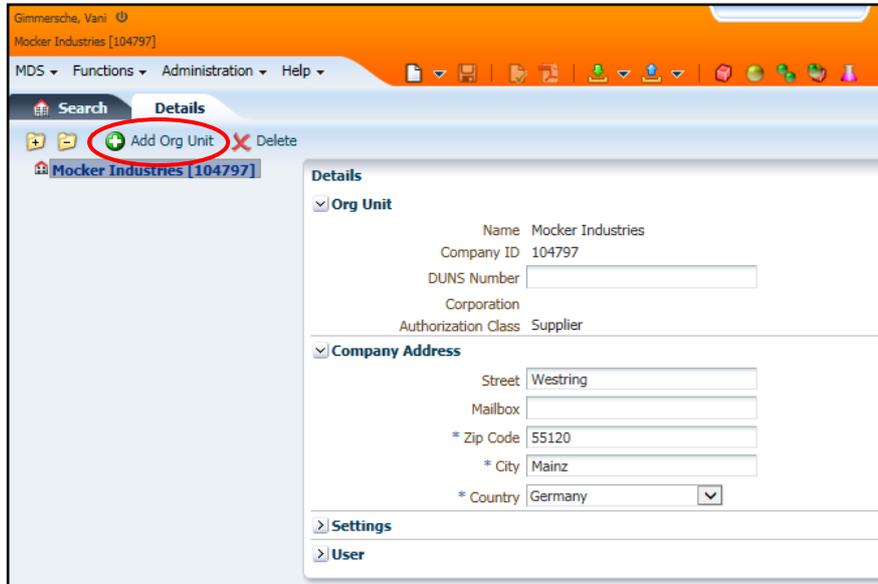
You can create a structure up to 5 levels deep. You must give each Org Unit a unique name. Due to the limitations of the display in search results screen, we recommend that the Org Unit name be no more than 20 characters although up to 50 characters is allowed. When you have the structure as you like it, save the structure.
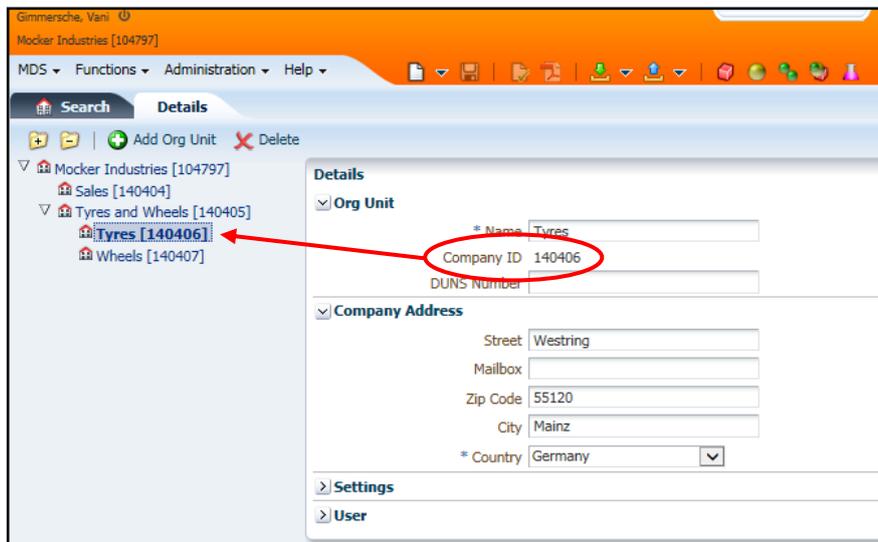
You are required to supply the Org Unit IDs in the Company Planner. You can find the ID directly behind the name of the Org Unit or, when you highlight the Org Unit, in the Details > Org Unit information (circled in red above).

Completing the Company Merge Planner

Once the new company structure is defined, you can now complete the Company Merge Planner. You will need the Company- and Org Unit-exact names and IDs of the source companies and the Company- and Org Unit-exact names and IDs of the target company structure.

The first part of the Planner is fairly self explanatory. You need to define the merge contact person (must have company administrator profile) and certify that all users have been communicated with.

1.	Contact Person:

Name	
Telephone	
International Country/Area Code	
Email	
Country	

2. All impacted companies/organization units that are part of the Company Planner attached are informed and agree:

☐ Yes

☐ No

Why a Contact Person

It is very rare that a merge will complete without questions arising. During the actual merge, the contact person MUST be available should there be any questions on the move. The actual merge timing will arranged between the DXC developer and the designated contact person.

Communicating with Users

It is the responsibility of the contact person to communicate with users in all impacted companies. These users will not be able to access the system during the merge and the company they log into after the merge will look different. Some of their User IDs may change. At a minimum, there will be many more data sheets in the search, sent, and received. Users may need to know how to use the Org Unit filters on these screens. They will probably need to tell their suppliers to send to a different ID.

To avoid issues, we highly recommend NOT merging IMDS companies representing joint ventures – the data is also owned by another company and joint ventures do not always last. A company split-off is not an easy activity.

A company administrator can find a list of users in other IMDS companies through the Administration > Trust User function. A company administrator can find a list of users in their own IMDS company through the Administration > User function. Users in their own IMDS company will not appear in the Administration > Trust User search. Although this function can be used for this purpose, it is not the primary purpose of this function which is why users in your own company do not appear in a Trust User search.

"Deny" List

The next question is regarding whether you would like us to add character strings to our "deny" list.

> 3. Please list the character strings/company names, related to your Company, that you want to be blocked for new online-registration (Does not prevent from registration via Help-Desk).
>
> *Example:* HPE will prevent any company registering online that has the character string "HPE" in their name.

There is nothing more frustrating for a company administrator after completing a merge to have some employee that didn't get the message start creating new IMDS companies. In an effort to assist you in controlling your IMDS processes, we have a "deny" list where you can place a name or character string so that users will not be able to make an online registration with that string of characters. For example, if DXC is on the deny list, users will not be able to register DXCUS or DXC US. However, if clever, they would be able to register D X C, D.X.C. or D&XC. It's not a perfect solution, but it does help control the situation. Anyone wishing to register a company with a string in the deny list will have to have a manual registration through a Service Center (Helpdesk).

AI (Advanced Interface) Licenses

If your company has an off-line system that communicates with IMDS through xml, you have an AI license. You can tell if there are any in your own company by using the Administration > User and searching on the profile Advanced Interface. You should be able to view the ID and find the contact information but you will not be able to make any changes. The IDs will appear in the Administration > Trust User search and are usually named in some fashion to identify them as Advanced Interface. You may email a Service Center (Helpdesk) with your list of companies and ask them to assist you in identifying AI licenses. However, if there are only one or two users in a company, it is highly unlikely that one of them has an AI profile.

> 4. Does your old Company have an AI License?
>
> ☐ Yes
> ☐ No
>
> If yes, who is the Contact Person?

Name	
Telephone	
International Country/Area Code	
Email	
Country	

> 5. Does your new Company have an AI License?
>
> ☐ Yes
> ☐ No
>
> If yes, who is the Contact Person?

Name	
Telephone	
International Country/Area Code	
Email	
Country	

If your company has an AI license either in your source or target company, please enter the contact information. They will need to be kept closely informed because there will need to be changes in the way your off-line system communicates with IMDS (for example new IDs/passwords, new company IDs, changes in the batch interface, etc.). The AI contact is responsible to handle all necessary steps to synchronize the inhouse system after the merge.

If the source company has an AI license, the in-house-system no longer receives data after the merge. The source company no longer exists. After adapting the AI contract to the data of the target company, the AI license is transferred to the target company along with other User IDs. The AI license contact may wish to request an initial download to pick up the data from the other merged companies.

If the target company previously existed and had an AI license, the daily download file reflects the transferred MDSs after the merge. This will probably be a very large file.

Migration Rules

The next stage is to detail the migration rules – exactly what you're moving from where to where. The Company ID/Org Unit ID that will have data moved from is the "source" and the receiving Company ID/Org Unit ID is the "target". The Company Merge Planner is to be used when ALL the data from the source is moved. If only a portion of the data is to be moved (for example only one or two Org Units), that is a Company Split-Off and is not covered in this service. The table for the Migration Rules is depicted in the following figure:

6. New company setup and existing company migration rules

source Company IMDS Company ID	source Company IMDS Company NAME	source Org. Unit IMDS ID OrgUnit ID (same as col. 1 if no Org. Unit)	source Org. Unit IMDS OrgUnit NAME (same as col. 2 if no Org. Unit)	Move to	target Company IMDS Company ID	target Company IMDS Company NAME	target Org. Unit IMDS ID (same as target company ID if no Org. Unit)	target Org. Unit IMDS NAME (same as target company name if no Org. Unit)
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You will need to explicitly state the Source ID and Name and the Target ID and Name. As discussed in the FAQs, you can only keep the Company/Org Unit IDs if the IMDS Company will be the receiving company. All other source companies will need new IDs.

Comments

Should you have any further directions or requests, this is the place to enter them.

7. Please enter any comments

Sign, Date and Finishing Up

If you have filled out the Company Merge Planner please sign it and send it combined with a binding Purchase Order via Fax to:

> EntServ Deutschland GmbH – IMDS Support
> +49 (0) 69 – 2 22 21 21 80 (Germany)

Please include the name, phone number and Email address of the Contact Person and the valid Tax Identification Number.

Should you need to add DXC Technology Germany to your purchasing system, the following are the company details:

Vendor Setup Information

IMDS System / IMDS Advanced Solutions

Um unsere Firma als Lieferant Ihres Unternehmens anzulegen oder um bestehende Daten zu ändern, nutzen Sie bitte folgende Informationen:

Please use the following information to setup our company as vendor or to change the existing data:

Firmenname / Company name:	**EntServ Deutschland GmbH**
Anschrift / Address:	Schickardstr. 32
	71034 Boeblingen
	Germany
Abteilung / Department:	IMDS Advanced Solutions
Fax-Nr. / Fax No.:	+ 49 (0) 69 – 2 22 21 21 80
Bankverbindung / Bank details:	
Bank Name:	Commerzbank Stuttgart
Bank Address:	Friedrichstr. 22
	70174 Stuttgart
	Germany
SWIFT-Code:	COBADEFFXXX
BLZ / Sort code:	600 400 71
Konto-Nr. / Account No.:	561515801
IBAN:	DE84 6004 0071 0561 5158 01
Währung / Currency:	EURO und / and USD
Umsatzsteuer-ID / VAT ID:	DE307881136
DUNS:	313 787 051
HRB / Register No.:	HRB 757510
Direct Tax ID:	56455 02556
US Fed Tax ID:	98-1329581

Further Support

For questions concerning all administrative and technical features we provide an email address:

mds-solutions@dxc.com

The IMDS Company Reorganization support team will post a reply to your questions as soon as possible.

Contact information

DXC Technology Germany

EntServ Deutschland GmbH

IMDS Advanced Solutions

Alfred-Herrhausen-Allee 3 – 5

65760 Eschborn

Germany

dxc.technology

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