What is an Org. Unit?

An Organizational Unit (Org. Unit) is an entity that facilitates data management in the company – a filing system if you will.

In early releases of IMDS, the general practice for many companies was to have each division or location register separately in IMDS. This practice required an individual to have multiple UserIDs to get access to their many registered IMDS companies – one user had ten (10) IDs. Senders sometimes had difficulty identifying the proper recipient from the list of similarly or identically named IMDS companies.

Additionally, if one division created an MDS that another division wanted to use and the divisions were separate IMDS companies, the first had to "Send" or "Propose" it to the second. The recipient had to "accept" the MDS prior to using the datasheet – the other option was to recreate the MDS. Either option resulted in a lot of extra work.

On the other hand, if a corporation decided that they wanted to centralize and register only once in IMDS, the retrieval of data was difficult as the number of MDSs grew. How do you find what you're looking for when the search request returns over 20 screens of MDSs?

In an effort to resolve these problems, the IMDS team designed and implemented Org. Units. Starting with release 1.7, users have the capability of structuring their IMDS Company hierarchically into Org. Units and assigning each MDS to an Org. Unit. The hierarchy may be up to four (4) levels deep from the root (or "Roof" company). There is no limit to the number of branches off the root.

Company Administrators have administrative capability over Org. Units.

How They Work

This section details how Org. Units work in IMDS.

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Before jumping into Org. Units, we strongly suggest that you plan your new structure and the roles and responsibilities of users.

Creating Org. Units

Before anyone can assign an MDS to an Org. Unit, the Company Administrator must initiate the hierarchy and assign users to Org. Units. The Company Administrator instructions in IMDS Information Pages > Help > FAQ contain detailed instructions on how to create users and assign them to the Org. Unit.

The Company Administrator will see an "Administration" main menu. Under this menu, there is a "Company" option. Constructing the company hierarchy is similar to constructing an MDS tree – however the only options are + and -.

Assigning Org. Units to Users

The next step for the Company Administrator is to assign Org. Units to Users. If you do not assign users to the Org. Unit, then the Org. Unit cannot be used. No user can place an MDS into an Org. Unit on the Supplier Data page unless they have the Org. Unit assigned to their ID. No user can see what is sent to the Org. Unit unless the Org. Unit is assigned to their ID.

In the Administration menu, there is a "User" option. This is the same option a Company Administrator uses to request a password reset for a User. Once a User is selected and modified, the Company Administrator can select which Org. Unit they want the User to have access to. Every user in the company has access to all MDSs created within the company or accepted by someone in the company – if they can find what they're looking for. Assigning Org. Units to a User will assist them in narrowing down the search for their Org. Unit in question.

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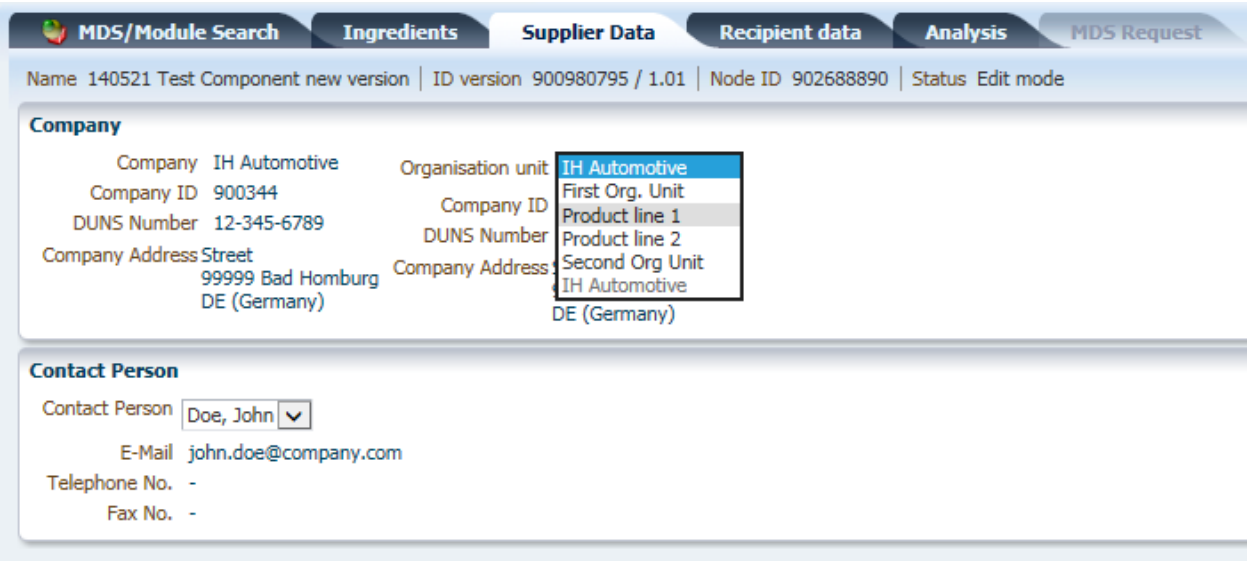
Saving an MDS into an Org. Unit

Since a single user may belong to several different Org. Units and work in several Org. Units during a single session, IMDS relies on the user to specify which Org. Unit the MDS is to be assigned to. The Org. Unit selection is on the Supplier Data Screen:



The elements of the drop down depend on which Org. Units are assigned to the user. In this case, the Product line 1 Org. Unit is not assigned to the ID I am using.

A user can only assign an MDS to an Org. Unit up until the time it has been released. However, a Company Administrator may change the assigned Org. Unit after release through the Administration > MDS Admin option.

Searching

For the discussion on Searching and Receiving, I will be using my test company with the following structure:

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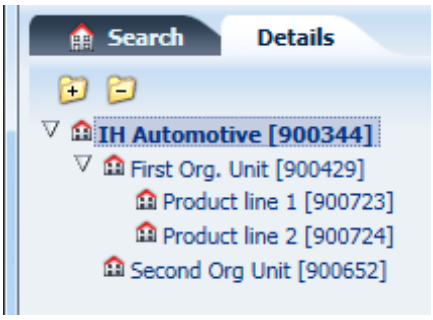
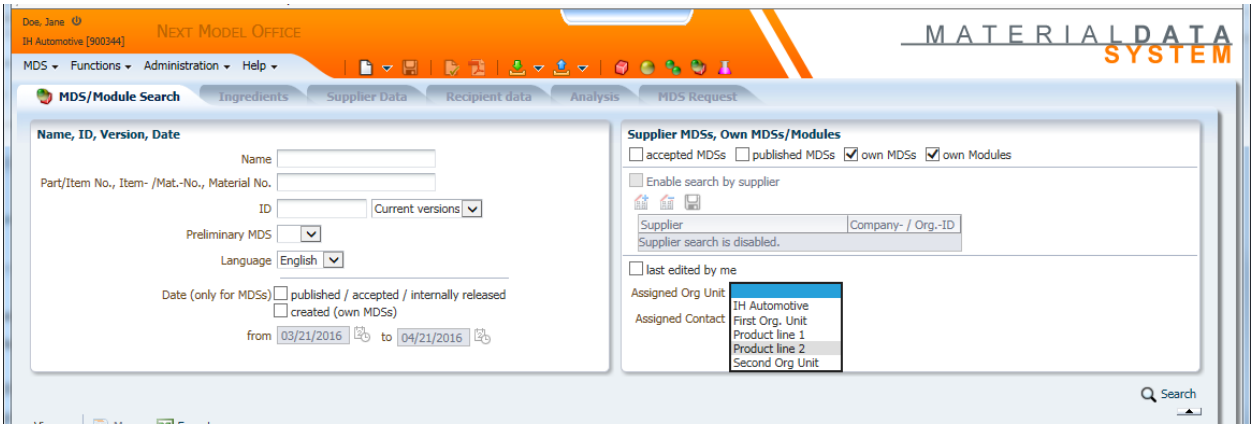


Any user has the capability of using the Org. Unit Filter and search for an MDS in any Org. Unit regardless of whether the Org. Unit is assigned to their ID (in this case the ID does not have the Product line 2 Org. Unit assigned):



Sending

Users will find sending to a company with an Org. Unit structure is fairly straightforward. Simply search on the company and find a list of Org. Units:

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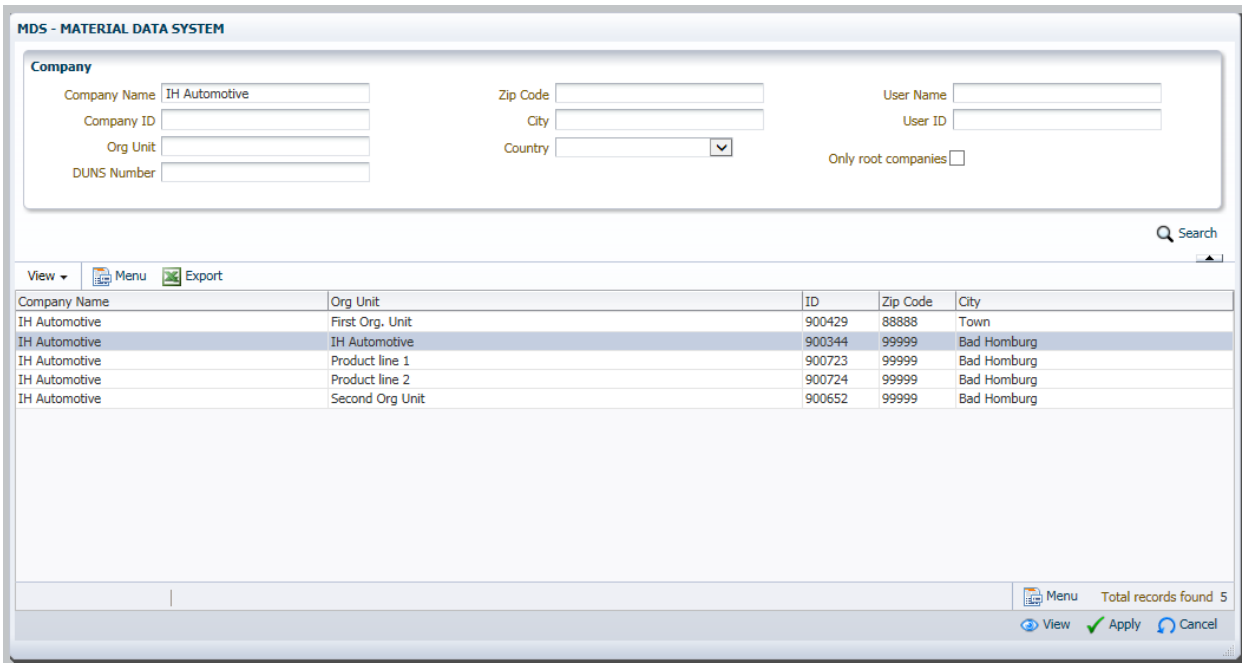

NOTE: Each company can appear only ONCE in the recipient list. In other words, you cannot send the same version of the MDS to IH Automotive (Product line 1) and IH Automotive (Product line 2). This is a problem if you supply the same part as more than one customer part number to the same IMDS Company. A solution is to copy/copy the MDS and then send the copy to your customer as the recipient data screen contains the recipient part number information. You can then work with your customer to institute common part numbering schemes.

Receiving

Org. Units can be extremely useful when receiving MDSs from suppliers. In the following diagram, I have searched on all MDSs received:

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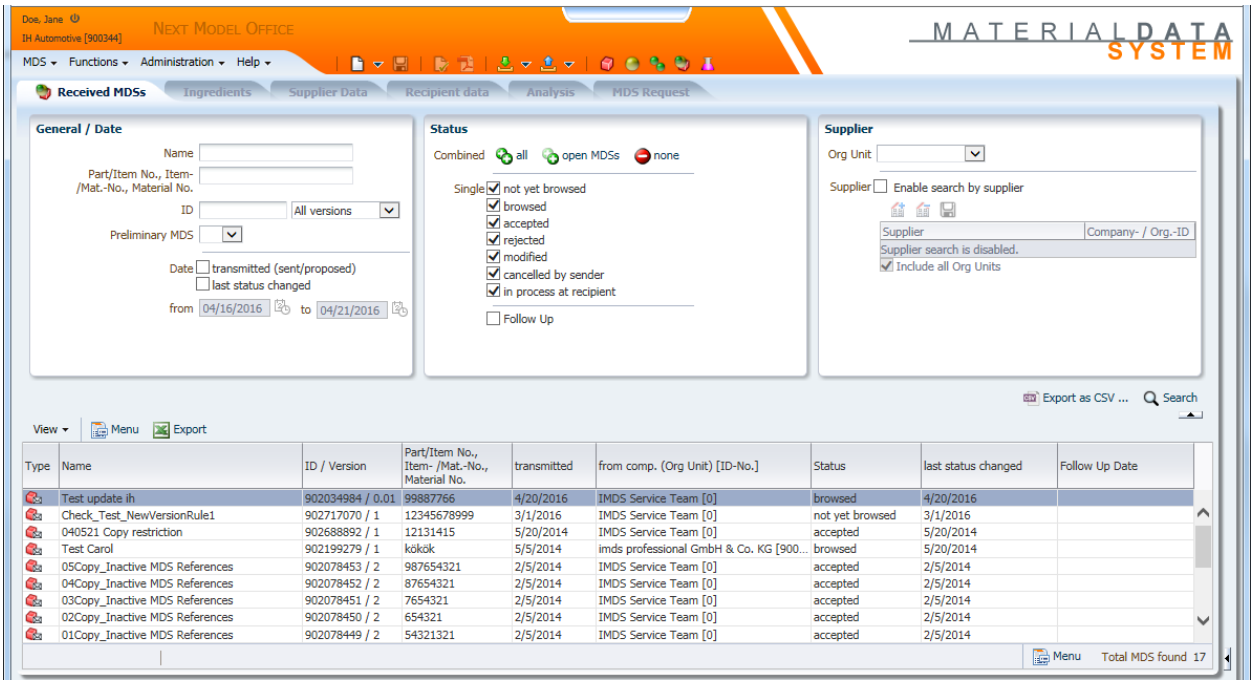

This is a small, example company – you can picture the problem in a large organization with thousands of MDSs being received. You can narrow the selection from 17 to 3 MDSs by using an Org. Unit as a filter:

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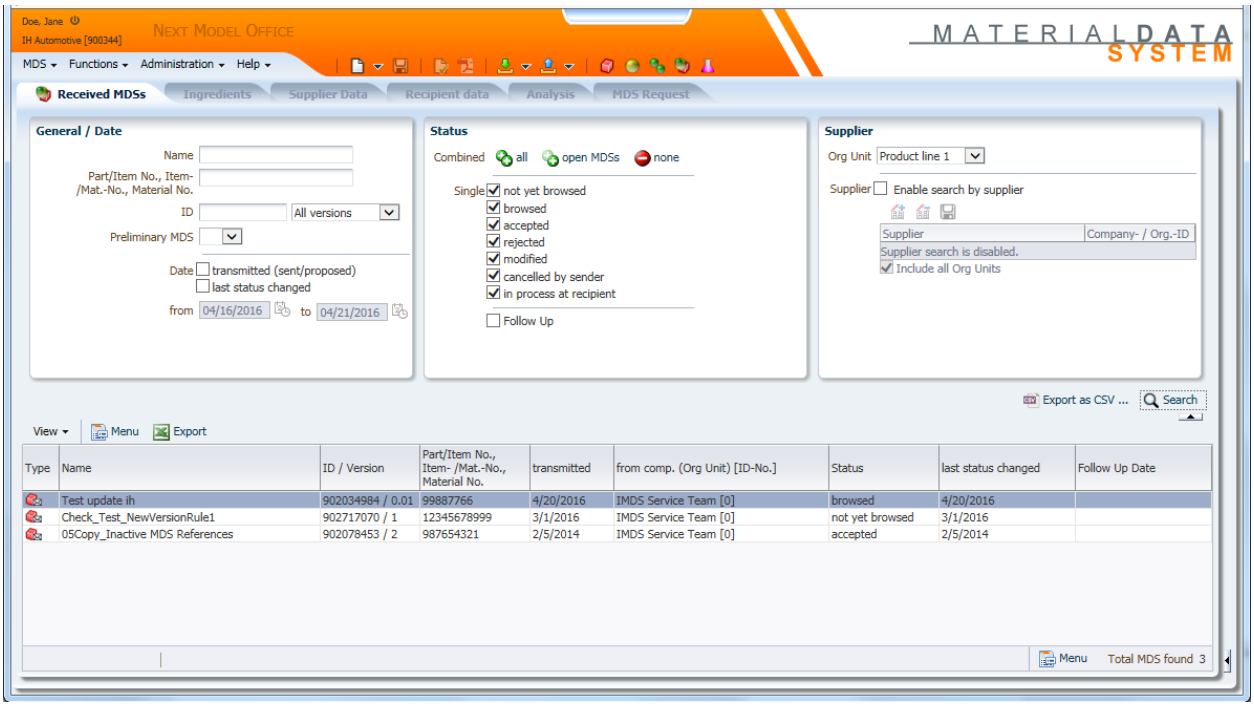

Now the person responsible for receiving into Org. Unit **Product line 1** can easily find those MDSs they must do something with.

The above illustration is assuming that the User has multiple Org. Units assigned to them. In the case where the User has no Org. Units assigned to them, all they will see is what is sent to the “roof” company (14 MDSs):

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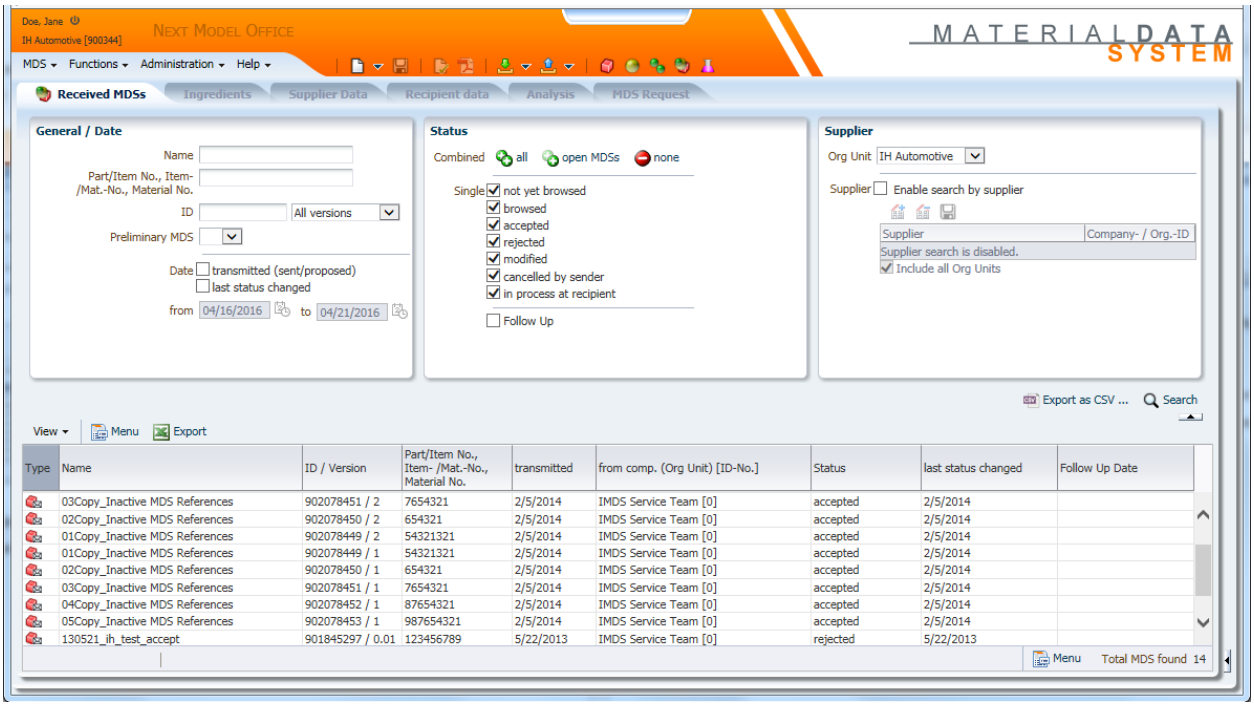
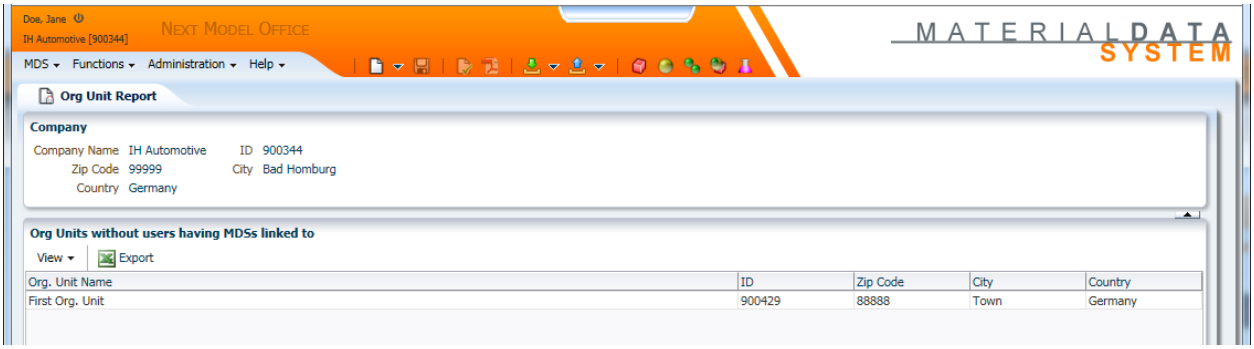


Checking for "Orphan" Org. Units

The Company Administrator will have under Administration the function "Org. Unit Report". This function will tell what Org. Units do not have any users assigned. For the illustration below, I have removed the **First Org. Unit** from the single user that had it attached:



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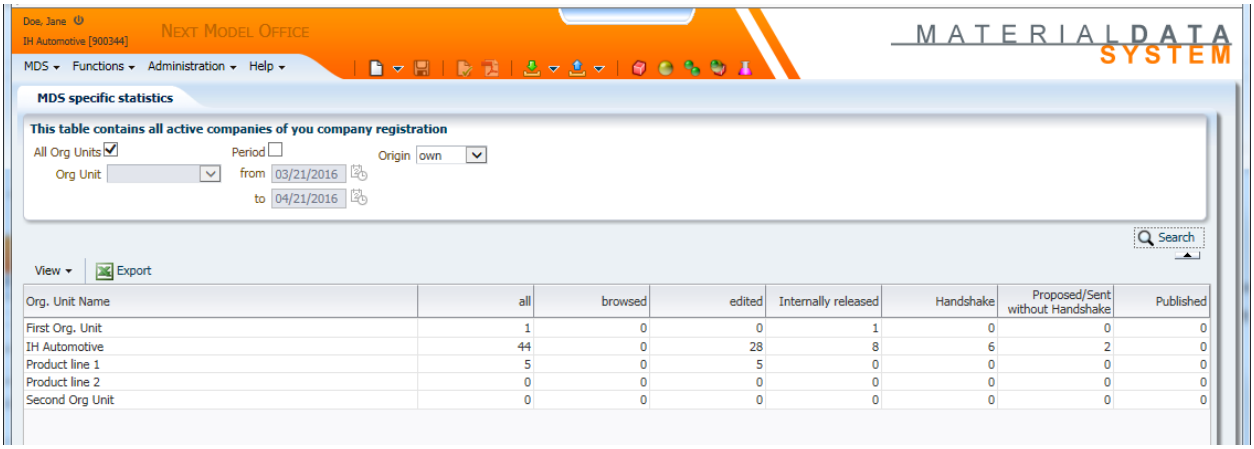
Checking Org. Unit Statistics

The Company Administrator has access to Statistics. The complete function is described in the Company Administrator tips. However, the below figure was generated with Statistics > MDS Statistics > own.



Org. Unit Name	all	browsed	edited	Internally released	Handshake	Proposed/Sent without Handshake	Published
First Org. Unit	1	0	0	1	0	0	0
IH Automotive	44	0	28	8	6	2	0
Product line 1	5	0	5	0	0	0	0
Product line 2	0	0	0	0	0	0	0
Second Org Unit	0	0	0	0	0	0	0

There are similar statistics for Sent and Received.

Moving From One Org. to Another

If the MDS has been released, and for large moves, you will need your Company Administrator to use the Administration > MDS Admin option to move MDSs.

For the following screen, I have selected All Own and searched on all MDSs that the roof company IH Automotive owns. By clicking on each item individually, I can select more than one MDS (Modules can only belong to the “roof company”):

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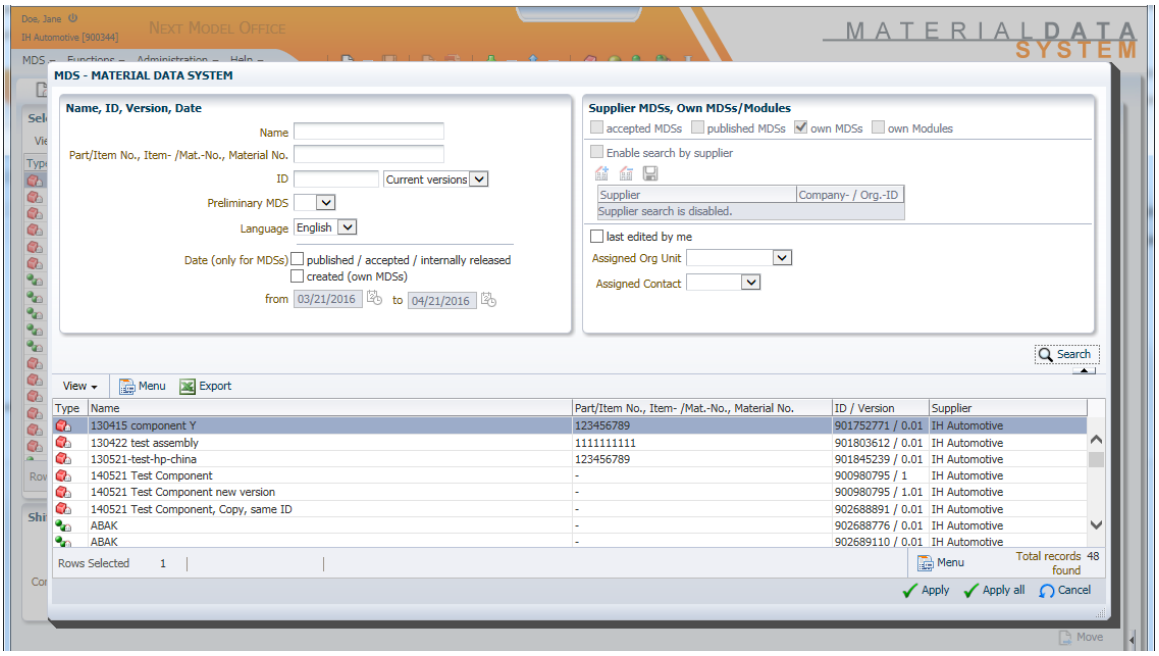
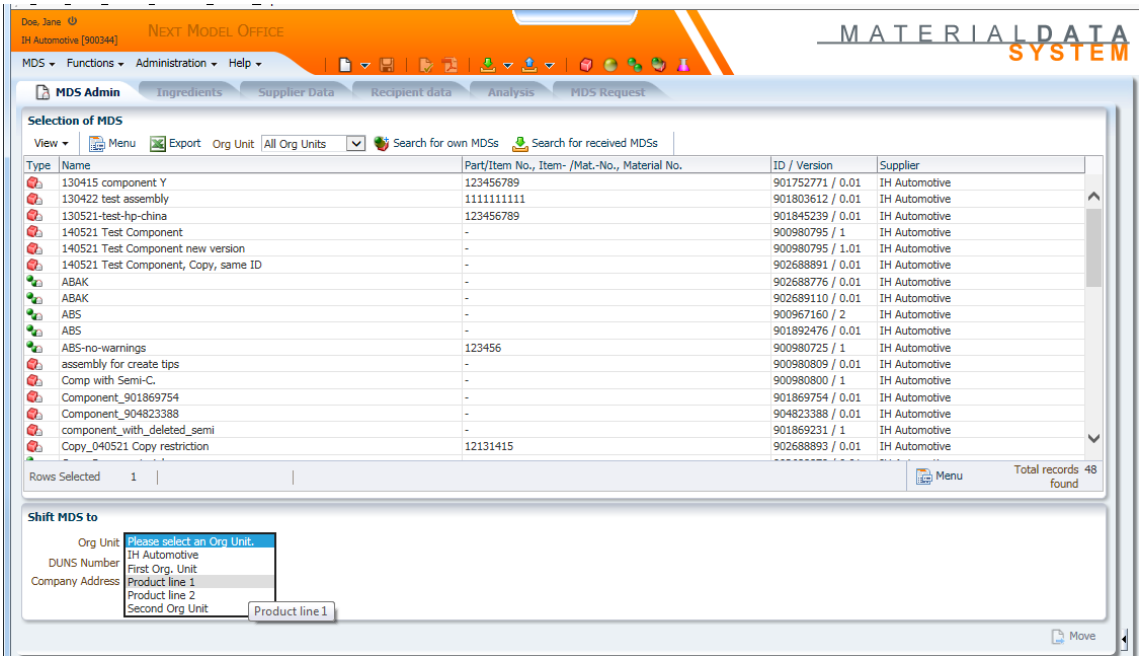


However, when selecting multiple MDSs, click **Apply** or **Apply all** before leaving the page and moving on to the next. After clicking on **Apply / Apply all**, I can select which Org. Unit to move the MDSs to:



After clicking on **Move**, your changes will be made.

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Should You Reorganize

The following are some of the benefits of merging your multiple IMDS registered companies into one IMDS registered company:

- Ability to perform analyses of parts across the entire company (e.g., use of restricted substances, use of materials for sourcing purposes, status of parts, etc.). Without restructuring, a user would need to have multiple UserIDs, one for each IMDS registered company, and perform the search in each IMDS company

- Ability to reuse modules that have been internally released across IMDS companies. Without restructuring, a user would need to have a datasheet sent from one IMDS registered company to another, then accept the datasheet before the datasheet can be used.

- Ability of suppliers to multiple divisions of the company to send only one datasheet – thereby reducing the time and effort accepting the datasheet (if all divisions use the same internal part number).

- A single UserID, rather than having to remember multiple UserIDs. Without restructuring, a user with a need to access multiple IMDS registered companies would need to manage up to multiple UserIDs and passwords

If your company has common processes and data repositories or if your vision is to have common processes and data repositories, you probably want to restructure into one IMDS company. Things to consider before moving to one IMDS company:

- Do different organizations within your company use different part numbers for the same supplier part? If yes, then you will need to consider one of the following before restructuring:

    a) Define a process where that supplier will send the datasheet to one organization unit using that organization's part number. Other organization units that need the same datasheet can then reuse (e.g., copy) the datasheet and specify their

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organization's part number to satisfy the different part numbers for the same datasheet

b) Request that the supplier create a new version of the same part and send that version to your other IMDS organization unit using that unit's part number.

c) Commonize part numbers across IMDS organization units

- Is it going to be a problem for your suppliers to find the Org. Unit for their recipient list? If yes, following restructuring, you will need to instruct your suppliers to search by the new IMDS registered company name and organization unit rather than the previous IMDS registered company names. DXC recommends that you advise your suppliers about newly created organization units to make sure that datasheets are sent to the right places.

- How do you coordinate who answers IMDS messages? Following restructuring, DXC recommends that you designate roles and processes for reviewing and accepting datasheets for their respective organization units. The IMDS sends messages (e.g. sent datasheet, cancelled datasheet, rejected datasheet) to the company level. The messages are available to any user in the company. Once the message is read, it is deleted. Therefore, by designating these roles, you will have greater accountability for processing datasheets.

- Are your different divisions separate entities with diverse products and few common suppliers? If yes, you will still benefit from restructuring. The ability to search for restricted substances across your enterprise provides an ability to manage conformance. In addition, if you are an IMDS Upload Interface user, then you can share access to the upload UserID rather than having to purchase multiple upload UserIDs.

How to Reorganize

Reorganizing your IMDS structure yourself involves the following:

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- Setup the new organizational hierarchy
- Create additional UserIDs and add the appropriate Org IDs to each
- Move all created MDSs from the old IMDS companies to the new one by sending
- Move all MDSs received from the old IMDS companies to the new one by creating an MDS, attaching a reference to the received IMDS and sending it to the new company
- DXC offers a consolidation service with fees based level of effort that will maintain traceability and UserIDs.
  Please see: https://public.mdsystem.com/en/web/imds-public-pages/imds-reorganization

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