Send/Propose & General Releasing Tips

Version: IMDS Release 10.0
About this Document

This document discusses the types of ways to “Release” or make productive your MDS or module.

It assumes there are no errors in the datasheet.

For information on correcting errors – please read on the IMDS Information pages > FAQ category IMDS Errors and Warnings > What do the errors in IMDS mean and how can I fix them?
What is Meant by “Released” or “Made Productive”

If you are familiar with ISO certified processes where there is only true and controlled copy of a document or process stored in a document library and other documents may list the URL of the document, you may think of the MDS that is being created as linking to other certified MDSs stored elsewhere. Instead of a URL, the link is an IMDS ID and version (or node ID).

In fact the “certified” example is a useful one. When you “release” an MDS, you are “certifying” that all the information is true and final. You cannot go back and make changes without changing the version number and releasing (or certifying). You cannot release (or certify) a top node while it links to uncertified (unreleased) MDSs/Modules.

A “Released” or “Productive” MDS or Module has a whole number version.
What to do With MDS/Module in Edit Mode

From Edit mode, you can:
- Internally Release
- Propose
- Publish
- Send

**Internally Release**
- This is for your company’s use only – a customer will not be able to see it unless attached to a tree structure that is Proposed, Sent or Published.
- After Internally Releasing, an MDS (not module) may be Proposed or Published.

**Propose**
- You may propose an MDS to one or more recipients – but only one recipient per “roof” company.
- Your customer then needs to perform a review of the MDS and either accept or reject.
- You may add additional recipients at a later time. If the MDS was in edit mode when you propose, it is “Released” at the time of Proposing. After the recipient accepts, the MDS can no longer be deleted.
- After Proposing, an MDS (not module) may be Published.

**Publish**
- This allows ANYONE with an IMDS ID to see the dataset and know whose data it is. There is no opportunity for your customer to review and for that reason many customers, in particular OEMs, will not accept Published data. If the MDS was in edit mode when you Published, it is “Released” at the time of Publishing.
- After Publishing, an MDS may have recipients added and Proposed – but after acceptance, the MDS cannot be deleted.

**Send**
- Allows your customer to review and accept your MDS. The MDS remains in edit mode and “handshake” mode until accepted.
- After sending, an MDS may be Published – but after acceptance, the MDS cannot be deleted.
Send/Receive vs. Publish

The process of sending or proposing and acceptance is supposed to be a quality check on the data. During this interaction, the creator of the MDS is essentially certifying the information for their customer and the customer either agrees or disagrees by accepting or rejecting the submission – although there are some companies who accept everything and come back later with a rejection in an email. While the IMDS Steering Committee has published Recommendations – each customer may have special requirements that could require resubmission.

The process of publishing is one-sided – the creator certifies, but there is no agreement on the quality of the data. Although it looks easier for suppliers – most customers have processes in place that eliminate the incorporation of published data. Unless you produce a commodity item – e.g. paint, wire, fastener – you should not be publishing.

Since there were too many suppliers who were publishing when they should not, publish is only an option if you have taken the time to read the instructions. The Company Administrator should read the Company Administrator tips in order to set the company and users up for publishing.
Relieve Release Frustration...

Before you can let an MDS be viewed by someone else (Internal Release, Send, Propose, or Publish) ALL the nodes of the tree must be released. That is why it is a good idea to work the BOM from the bottom up.

Once you Internally Release, Publish, or Propose, the version is set and you cannot make ANY changes.

Once an MDS is accepted by your customer – you cannot delete the datasheet or the recipient.
Internal, Publish, Send or Propose?

Decide:

- Internal?
  - Yes: Internally Release
  - No: External
    - Few customers?
      - Yes: Published
      - No: 1 customer?
        - Yes: Send
        - No: Propose

Few customers?
- Yes: Used by a several companies Perhaps has a Tradename
- No: Have specific Customers for product that may have different customer part numbers

1 customer?
- Yes: Used by more than One company, but Limited customer base
- No: Only one customer
## Send & Propose - Pros and Cons

<table>
<thead>
<tr>
<th>Pro</th>
<th>Con</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send</td>
<td>If recipient rejects it, the MDS can be edited to correct the problem.</td>
</tr>
<tr>
<td>Propose</td>
<td>Same MDS can go to multiple customers each with their own part number.</td>
</tr>
</tbody>
</table>
How Send/Receive Works

- **Data sheet (version 0.01)**
  - Status: nsen

- **Data sheet (version 0.01)**
  - Status: seen

- **Data sheet (version 1)**
  - Status: acpt

- **Data sheet (version 0.01)**
  - Status: recd

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**Customer**

- View data sheet (version 0.01)
  - Status: seen

- **Accept?**
  - Yes
  - Recd status on Received list
  - Modify - Search or Sent → Modify - make changes and send – same ID/Version only appears once in Sent list and customer Received list - Version: 0.01, Status: nsen

- No
  - Remove Recd status on list

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**Supplier**

- Resolve problem

- Modify - Search or Sent → Modify - make changes and send – Should not use as leaves extraneous MDSs in system – Instead, modify rejected MDS
How Propose/Receive Works

Data sheet (version 1) Status: nsen

Data sheet (version 1) Status: seen

Data sheet (version 1) Status: acpt

Data sheet (version 1) Status: recd

View data sheet (version x) Status: seen

Accept?

Customer

Yes

No

Copy/New Version and make changes – Version 1.01

Propose again – Version 2

(if more than one customer, suggest Copy/Copy to make it easier for your customer to find after acceptance)

Status: nsen (MDS copies of product on both sent and customer’s received list)
Send

In the Create Tips, we added the customer information. In this case, I have made sure that I released all the nodes of the tree and that all weights and tolerances are correct so I don’t get any errors.
Complete the Send and Note the Status Change

If you’re sure you want to send, click on OK.

Notice how the status has changed to “not yet browsed”.

Status changes to "Handshake" and "not yet browsed".
## Common Errors/Solutions

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non basic substances must be decomposed further.</td>
<td>There must be a basic substance ( ) symbol at the bottom of every path from the top of the tree.</td>
</tr>
<tr>
<td>The quantity must be one item at least.</td>
<td>Make sure that the Quantity of each component MDS used is at least 1.</td>
</tr>
<tr>
<td>Weight needs to be higher than zero.</td>
<td>Make sure the weight of all semi-components and materials is specified.</td>
</tr>
<tr>
<td>The deviation between Measured Weight and Calculated Weight per Item exceeds the entered tolerance.</td>
<td>Check the calculated weights of sub-nodes against the stated weight and tolerance one level up and adjust where needed.</td>
</tr>
<tr>
<td>The referenced module (or referenced datasheet) is not internally released.</td>
<td>Use the correct button to find the problem, then Search the Module (or MDS), Modify, and internally release.</td>
</tr>
<tr>
<td>Sum of fixed values and range values too small.</td>
<td>Make sure the sum of all % at the same level = 100</td>
</tr>
<tr>
<td>No classification specified.</td>
<td>You have not given the Material a classification.</td>
</tr>
</tbody>
</table>

For a complete list of errors and how to fix them, please read the How to Fix Errors Tips.
From the Customer Side…

Under Administration > Personal Settings, everybody can subscribe to receiving e-mails in case of certain events. In this case, an e-mail is sent to the recipient, if an MDS is received - notifying the user that an MDS was received and is available in the Inbox.

Events for which a subscription can be entered.
Notification for You from Your Customer

Under **Administration > Personal Settings**, you can also subscribe for e-mail notification for the case an MDS is accepted or rejected and is available in the Outbox. So, if your customer accepted or rejected your MDS you will receive an e-mail.

Events for which a subscription can be entered:
Viewing the MDS – Customer’s View

In case of a received MDS, the system will generate an e-mail message to you (according to your subscriptions under **Personal Settings**). From your Inbox you can directly access the MDS. In this case the part number was incorrect and the customer decided to reject the MDS. Here is what he sees after rejecting:
Viewing the MDS - Status Change in your Outbox

In case of a rejected MDS, the system will generate an e-mail message to you (according to your subscriptions under Personal Settings). From your Outbox you can directly access the MDS:
Fixing the Problem in “Handshake”

Click on Recipient data to go directly to the message.

If you used the Send command as opposed to Propose, you can fix the problem without creating a new version or copy. The MDS goes back to Edit mode after being rejected.

When rejecting, your customer should have entered a message when they rejected the part – in this case, the part number was incorrect.

NOTE: if your customer says you have the wrong part number or description, fix it here and not on your ingredients page as this is what they see on their ingredients page.
Searching the Outbox / Proposed Filters

There is a MAXIMUM of 500 search result items displayed in the Outbox.

Possible ways to narrow the results to what you’re looking for is to search on –

- Date
- Status
- Ingredients
- Org.-Unit sent from
- Recipient
Searching Sent/Proposed Filters > Date

transmitted – Date you sent/proposed to customer

last status changed – Date status of MDS changed – something was done to it by your customer or if it has not been accepted, date someone deleted the recipient or deleted the datasheet.

![Date transmitted and last status changed with dates 09/03/2016 to 09/08/2016]
Searching Sent/Proposed Filters > Status

open MDSs – MDSs that have not been accepted or rejected

Individual Status:

not yet browsed – customer hasn’t looked at it

browsed – customer has looked at it but hasn’t accepted or rejected

accepted – customer has accepted

rejected – customer has rejected

modified – you have made a change to an MDS and need to resend or re-propose

cancelled by sender – the MDS was not yet accepted and you have either deleted the recipient or deleted the datasheet

in process at recipient – customer has an offline system that handles acceptance and rejection and it is currently in the offline system waiting action

forwarded only – MDSs that started as an MDS your company received and a Copy/Forward was made and sent to your customer

obsolete – the search will include MDSs marked as obsolete in your company
Searching Sent/Proposed Filters > General Info

**Name** – the article name from your Ingredients chapter NOT the name from the Recipient Info

**Internal number** – the information from your Ingredients chapter NOT the information from the Recipient Info Screen

**External number** - the information from the Recipient Info Screen NOT your Ingredients chapter

**ID** - the IMDS ID number

**Versions** – either just the latest (current) or All versions

**Preliminary MDS** – MDSs that have had the Preliminary MDS box checked
Searching Sent/Proposed Filters > Org.-Unit

Org.-Unit that is associated with the MDS. An MDS can be placed into an Org.-Unit by:

- Selecting the Org.-Unit when creating on the Supplier Data Page
- The Company Administrator using Administration > MDS Admin to move the MDS into the respective Org.-Unit

YOU MUST HAVE THE ORG.-UNIT ASSIGNED TO YOUR ID TO USE THIS FILTER – your Company Administrator can assign the Org.-Unit to your ID.
Searching Sent/Proposed Filters > Recipient

If you do not check “Enable search by recipient”, you will get ALL recipients.

Include all Org Units – you will get all MDSs that you have sent to an Org.-Unit or the “roof” of your recipient.

Add recipient to list – here you can add recipient companies to your list of recipients, remove them or save the recipient list – if it is saved, it will be available as default next time you use this screen

Search – search for those results meeting your criteria

Export – create a .csv file of your results
Finding Problems

In this case, I’ve searched on rejected MDSs because I want to find the rejected ones (Status rejected).

Right-click on an MDS and choose “Show reject reason”.
Finding Problems > Reject Reason

In the screen, all the available information on the user that rejected the MDS appears.

Since this MDS was SENT (version .01) changes can be made anywhere. If it was Proposed, only changes on the recipient data screen could be made. If you right-click and choose View you can go to the MDS.
Finding the Problem > Edit

In order to edit the MDS, you need to choose **Edit** after right-clicking.

Since we used Send I can make changes anywhere. If this was Proposed, I could only make changes on the Recipient Data Screen.
Changes Made – Send Again

If it’s an incorrect part number, description, supplier code, or anything else on the company data page, you can make changes.

When done, **Send** again.
If Part Number or Description Incorrect – FIX ON RECIPIENT PAGE

Why is my customer not seeing my changes in either the Part Number or Description?

IMDS has been set up so that a supplier can propose the same MDS to many different customers without the supplier having to make copies and yet each customer will receive their specific purchase part information.

How this works is that in the customer's view, IMDS places the Part number and Description you enter in the Recipient-specific data onto the recipients Ingredients page. In version .01, when you add the recipient, the information from the Ingredients page is copied to the Recipient information. However, when you modify the original version or copy/new version, the information on the recipient page is not updated.

How you should correct a rejected MDS when the MDS was rejected for either a part number or description issue:

1. Modify the rejected MDS, then go to the Recipient Data screen, highlight the recipient that rejected, modify the data as requested by the recipient.
2. Hit Save, the recipient status on the highlighted recipient will be "modified".
3. Either send or propose as originally.

If your customer has not accepted the MDS, ask them to reject. If your customer has already accepted, you will have to make a copy/new version and go to the recipient screen and make the changes. No changes can be made to an accepted MDS.
Check Again and Send

Click the little disk icon to **Save** your changes. You can always initiate a check by either using the menu item check or directly check by clicking the check icon. Otherwise, the check will be automatically carried out once the **Send** button is clicked.
Complete the Send

Since the check was successful, click the **Send** button to send it.

Are you REALLY, REALLY SURE? – click **Send** again.
...and Back to Not Yet Browsed

The MDS is now in the hands of your customer - note the status change.

If there’s something else you need to fix, you can click on the Sent MDSs tab to go back to the Outbox list.
## Propose Conditions

<table>
<thead>
<tr>
<th>Customer 1</th>
<th>Customer 2</th>
<th>Supplier actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>not yet browsed</td>
<td>rejected</td>
<td>Part can be modified and proposes to both, status goes to <strong>not yet browsed</strong> for both</td>
</tr>
<tr>
<td>browsed</td>
<td>rejected</td>
<td>Theoretically part can be changed (or deleted) and status becomes <strong>modified</strong> (or <strong>cancelled by sender</strong>) for Customer 2. If <strong>modified</strong>, Customer 2 can't accept or reject. Best action is to wait to see what happens with other customer.</td>
</tr>
<tr>
<td>rejected</td>
<td>cancelled by sender / modified</td>
<td>Part can be proposed again to both - and the <strong>cancelled by sender</strong> tag gets changed back to <strong>not yet browsed</strong>.</td>
</tr>
<tr>
<td>rejected</td>
<td>accepted</td>
<td>Modifications can only be made to recipient data information on customer 1. Changes to tree: Search/Copy/new version. You can delete customer 2 from send list in copy. New version is 1.01.</td>
</tr>
</tbody>
</table>
Other Topics

How can I?

- Prove that I submitted
- Have a record customer accepted
- Print a copy for my records

All of these can achieved by using the **MDS Report** function.
Use of the MDS Report Function

Since PPAPs usually require IMDS submission, some customers require proof that the submission was made and that it was accepted – use of the MDS Report function has helped with this.

Highlight the desired MDS and click on MDS Report.

My company is the top (IH Automotive) – my customer is IMDS Service Team.

For this, you want your customer’s view so select your customer from the list. The small screen changes to:

Click OK to continue.
Section 1 contains information about the Supplier Contact and the information from the Recipient Page. It also gives the Recipient Status and the date of acceptance. This is usually sufficient for PPAP.
Section 2 contains the complete structure of the tree. To save space, each column will have a different meaning depending on the node it is giving information on. While this isn’t an exact print out of the tree, it will have to suffice.

Although this is theoretically in your customer’s view – if you have marked substances confidential – those substances will show here – but your customer will not see them. Additionally, if you have internally released or supplier created MDSs/Modules on the tree, you will see the ID in the printout, but your customer will not see them.

It should be noted that since this is essentially a certificate – you cannot edit the .pdf file.
Conclusion

Whether you **Send** or **Propose** is up to your internal processes and your customer’s requirements.

Unless you produce a commodity item, it is preferred you not use **Publish**. Remember anyone with an ID in IMDS (and at last count that was over 250,000 people in just about every country in the world) can see your structure.