

IMDS Company Merge Planner User Guide

Version 7.0

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Introduction

Since organization units (→ org 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 org 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, 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 org 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 datasheets 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 carefully read 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>).

Frequently Asked Questions (FAQs)

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

Can the original IMDS Company IDs be kept?

Yes, this is possible. In a standard company merge, all data is moved from one company to another and the source company is deleted. This applies to the “roof” company as well as to all its organizational units. If the structure of the source company is also to be transferred to the target company, a so-called double merge must be performed.

First, all data from the source company must be moved to a temporary company. Then the company structure can be transferred to the target company – the IDs of the source company and its org units will be kept.

The final step is to move all data from the temporary company to the target company. As the **effort doubles**, the costs also **double**.

How does the Company Merge work?

DXC moves all modules, datasheets, MDS requests, users, and contact persons from one company/org unit to another company/org unit including sent and received datasheets. 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 Merge Planner requires the company IDs and org unit IDs be used in addition to the company/org unit names.

All data is moved according to the Company Merge Planner. Usually if a datasheet (e.g. the same MDS ID/version) has been received by more than one source company that is planned to merge, the datasheet will be assigned to the target org unit or “roof” company depending on the merge sequence if not already present. The company administrator may assign these datasheets to the responsible org unit later. 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/org unit will be deleted.

Additionally, we recommend preventing 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 “ABC” is on the deny list, no one can register online with the character string “ABC” in the company name.

Please make sure, that all companies listed in your planner belong to you and those representatives of these companies are informed. We strongly recommend not merging IMDS companies that represent joint ventures. 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, org units can be added as depicted in the following figure by using the “+ Add Org Unit” button like creating an MDS structure:

The screenshot shows the IMDS Company Merge Planner interface. At the top, there is a header bar with the user name 'Gimmersche, Vani' and the company name 'Mocker Industries [104797]'. Below the header, there is a navigation bar with tabs for 'Search' and 'Details'. The 'Details' tab is active. In the 'Details' tab, there is a section for 'Mocker Industries [104797]' with a '+ Add Org Unit' button highlighted in a red box. To the right of the 'Add Org Unit' button is a 'Delete' button. Below the 'Add Org Unit' button, there is a 'Details' section with a 'Company Address' section. The 'Company Address' section contains fields for 'Street' (Westring), 'Mailbox', '* Zip Code' (55120), '* City' (Mainz), and '* Country' (Germany). Below the 'Company Address' section, there are links for 'Settings' and 'User'.

You can create a structure up to 9 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. Once you created the structure you need, please save it.

The screenshot shows the 'Details' view of the 'Tyres' org unit. The left sidebar lists the hierarchy: Mock Industries [104797] > Sales [140404] > Tyres and Wheels [140405] > Tyres [140406]. The 'Details' panel on the right shows the 'Org Unit' section with fields for Name (Tyres), Company ID (140406), and DUNS Number. Below this is the 'Company Address' section with fields for Street (Westring), Mailbox, Zip Code (55120), City (Mainz), and Country (Germany). At the bottom are links for 'Settings' and 'User'.

You are required to supply the org unit IDs in the Company Merge Planner. You can find the ID directly behind the name of the org unit or, when you highlight the it, in the “Details > Org Unit” information.

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 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	
Phone incl. international Country Code	
E-Mail	
Country	

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

☐ Yes

☐ No

Why a Contact Person

It is very rare that questions arise during the data transfer. The contact person **MUST** be available should there be any questions on the move. The actual merge timing will arrange 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. Users of the source company should not access the IMDS 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 datasheets 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 company 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.

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 company 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:

Source Company					Target Company			
Root Company ID	Root Company Name	Org Unit ID	Org Unit Name	Move to	Root Company ID	Root Company Name	Org Unit ID	Org Unit Name
				→				
				→				
				→				
				→				
				→				
				→				

You will need to explicitly state the ID and name of the source company and the ID and name of the target company. As mentioned above, it is possible to keep the IDs of the source company and its org units.

Comments

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

4. Please enter any comments

Sign, Date and Finishing Up

If you have filled out the Company Merge Planner, please sign it and send it by email or via fax to:

EntServ Deutschland GmbH – IMDS Advances Solutions

E-Mail: mds-solutions@dxc.com

Fax: +49 69 2222 1218 0

In case you want to order the service, please be aware that the PO must contain ...

- ... an order number
- ... the legal company name (a logo is not sufficient)
- ... the complete billing address
- ... an email address where the invoice should be sent to
- ... the VAT number of the company (only if applicable)
- ... the correct designation of the service(s) to be provided (→ IMDS Company Merge)
- ... the correct amount incl. currency (EUR or USD)
- ... the payment terms N30 (30 days net)
- ... the DXC Contact Information as ...

EntServ Deutschland GmbH

Schickardstr. 32

71034 Boeblingen

Germany

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

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
E-Mail-Adresse / E-Mail Address:	mds-solutions@dxs.com
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:	56450 20432
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](https://www.dxc.technology)