

IMDS Company Split Off 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. Many of the requests are a result of a selloff of a product line, site or division and require that data be separated from one IMDS company and move to another IMDS company. 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 separate data from one IMDS company. The Company Split Off Planner standardizes the procedure for these requests allowing it to be offered on a fixed price basis. It should be noted here that the standard Company Split Off is just that – the data that resides in an org unit will be separated from the existing “roof” company and placed into another “roof” company. It is the responsibility of IMDS Company Administrator(s) in the source company to ensure that all the data that needs to be moved is in the affected org unit(s).

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. 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 you wish activities outside the scope of the standard split off (e.g. move datasheets into the org unit, move more than 100,000 MDSs, move more than 20 org units) or any other tasks not covered by this Company Split Off Planner, please define your request as detailed as possible and email it to mds-solutions@dxc.com. 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 the following instructions and example carefully and follow the given procedure.

Thank you for your cooperation.

Note: Information about creating company structures, user administration, and moving MDSs into org units can be found on 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 Org Unit ID be kept?

Yes, the IDs of the involved source org units can be kept. For this, DXC must transfer all moveable datasheets assigned to an affected org unit to a temporary company.

Then all remaining (non-transferable) datasheets must be moved to the “roof” (source) company and users still assigned to the org units must be unassigned.

When this is done, the org units can be moved to the target company. Once finished, all data must be transferred from the temporary company to the moved org units in the target company.

As the effort doubles, the costs also double.

How does the Company Split Off work?

The Split Off function enables the movement of the data related to one or more org units from an IMDS “roof” company and into a different IMDS “roof” company. In most cases **not all data can be moved**. The amount of data of the org unit that can be moved depends on how referenced or “intertwined” the datasheets are. The following list shows the main reasons for blocking data transfer.

Modules and datasheets that cannot be moved ...

- ... reference minor versions of remaining data
- ... modules or datasheets having the same module ID as remaining modules or datasheets
- ... are referenced by minor versions of remaining data

For example, if your company has created their own set of MDSs that have been used by all org units, there is going to be an issue as there will be MDSs that use these MDSs that are not going to move and that will block the transfer of data from the org unit.

Prior to actually moving the data, DXC runs an analysis to determine the amount of data that can be transferred. In order to perform the analysis, the company administrator will need to review the users that are assigned to the org unit(s) to be split off. This is very important, as modules cannot be assigned to an org unit and the only possibility to move them is to identify them by the user who has created them.

The analysis can be executed in one of two ways:

- Mode 1: Modules created by assigned users and datasheets assigned to an affected org unit
- Mode 2: Mode 1 plus datasheets created by users of the org unit but belonging to other org units or the "roof" company that are not moving

The result of the analysis might look like this:

Amount	Asset	Transferable	Percent
Own Modules / MDSs	497	282	56.74%
Received MDSs	700	700	100.00%

No problem with the received MDSs – 100 % of them will be transferred. However, less than 100 % of the own MDSs will be transferred.

If you want to improve the result of an analysis run, please follow the instructions given in chapter "*How to improve Split Off results?*". After the affected data has been updated to increase the transfer rate, further analysis can be performed. It will show if the actions were successful.

Transfer rules

1. After completion the source org unit(s) will be deactivated.
2. Users assigned to non-transferable MDSs reside in the source company with their user ID + a after the Split Off execution. In the target company they will maintain their existing user ID. For example, if **gabcd001** owns a datasheet that cannot be moved, the user assigned to **gabcd001** will have 2 IDs – **gabcd001** in the target company and **gabcd001a** in the source company. It will be the responsibility of the company administrator of the source company to deactivate **gabcd001a** when access to the source company is no longer needed.

Suggestions for data that cannot be moved

If data cannot be moved, the target company's administrator may reach an agreement with the source company's administrator to keep access to the source org unit after the Split Off and request to reactivate this org unit. Users can then send/propose a non-transferrable datasheet to the target company and copy it there so that it becomes an own datasheet that can be used as the basis for further versions.

Why can't data be transferred?

The amount of transferable data depends on how intertwined or "referenced" the data is. In the end, the "referenced" datasheet must reside only in one company - it either goes or stays but cannot reside in two IMDS companies. If an MDS that is to be transferred and an MDS that will stay both reference

the same datasheet, the MDS that the user wants to transfer cannot be moved. If an MDS that will stay references an MDS that is to be transferred, that data cannot be moved. The only exception to this is if the "referenced" MDS is published.

How to improve Split Off results?

After the first analysis, you will receive the Split Off result showing the amount of data that currently could be moved.

In the example in a previous section, the analysis shows that 100% of the received MDSs can be moved but only about 57% own MDSs (data created by your company) can be moved. Attached to your results, you will receive a report called OwnInhibitors.csv. This report shows MDSs blocking other MDSs from being transferred because of references.

The following table explains the information presented in the report:

Column	Value
Node ID	
IMDS ID / version	
MDS / module	Datasheet or module
Type of MDS	Component, semi-component, material
Active	Deleted or active
Own	Own or received
Status	In edit mode , internally released, in handshake mode, sent, published
Recipient status	Accepted, Rejected
Company-ID	The roof ID or the Org Unit ID
Count	Shows how often this MDSs blocks other MDSs from transfer.
Name	Name of the MDS
Inhibitant Node ID	Node ID of MDS that cannot be moved
Inhibitant IMDS ID / Version	Module ID/Version of MDS that cannot be moved
Inhibitant Name	Name of MDS that cannot be moved

For example, one reason an MDS blocks another MDS is that the blocking MDS is located in a different Org Unit or in the roof company. The first thing to do with this report is to check the column "Company-ID" and to make sure that all MDSs mentioned on this report are in the Org Unit to transfer. If they are not, the company administrator can use Administration > MDS Admin to move the MDS into the Org Unit. Modules only reside in the "roof" ID.

The second chance to improve the result is to review all MDSs of this report checking if they contain any blocking MDSs and replace blocking MDSs by non-blocking MDSs.

Lastly, review the user assignment on the Org Unit to make sure that all users are correctly assigned as this assignment directly influences the number of Modules selected for the analysis run. Modules are attributed based on creating user to the Org Unit for transfer.

What to do with non-transferable own MDSs?

The only way to get non transferable MDSs to the target company is to copy them manually, mark “yes” in the recipient data for “Forwarding allowed”, send them to the target company and accept them there. If you have a large number of non transferable own MDSs, please be aware that you may need access to this data later on. This implies, that you need to request the reactivation of your source Org Unit after the Split Off procedure.

How to fill out the Company Split Off Planner?

Preliminary Work

First, the company administrator needs to make sure that a target company exists. It is not possible to use as target companyID any companyIDs or orgunitIDs of the source company. If a target company does not exist, the Client Manger needs to create the new company either through Online Registration or through Manual Registration through the Service Centers should there be difficulties. After the “roof” company is created, the company administrator needs to complete the structure in IMDS.

The company administrator may add Org Units to the structure of an existing IMDS target 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:

The screenshot shows the 'Mocker Industries [104797]' details page. The 'Add Org Unit' button is highlighted with a red box. The 'Details' section on the right contains the following fields:

Details	
☒ Org Unit	
Name	Mocker Industries
Company ID	104797
DUNS Number	
Corporation	
Authorization Class	Supplier
☒ Company Address	
Street	Westring
Mailbox	
* Zip Code	55120
* City	Mainz
* Country	Germany
Settings	
User	

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.

The screenshot shows the 'Mocker Industries [104797]' details page with a hierarchical structure of Org Units. The 'Tyres [140406]' Org Unit is highlighted with a red box, and a red arrow points to its details. The 'Details' section on the right contains the following fields:

Details	
☒ Org Unit	
* Name	Tyres
Company ID	140406
DUNS Number	
☒ Company Address	
Street	Westring
Mailbox	
Zip Code	55120
City	Mainz
* Country	Germany
Settings	
User	

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).

Secondly, the company administrator needs to ensure that the assignment of the users to the organization unit(s) to split off is correct. This is very important, as Modules are not assigned to any organization unit and the only possibility to select Modules is to identify them by the user who has created them. If a user is assigned to the organization unit to split off, all Modules created by this user will be selected by the analysis job.

User ID	Last name	First name	Organisation unit	Telephone No.	Valid as of	Valid until	active
gimmers	Gimmersche	Vani	Sales	12345	9/28/2011	2/7/2023	☒
gimmers	Gimmersche	Vani	Tyres	12345	9/28/2011	2/7/2023	☒
gimmers	Gimmersche	Vani	Wheels	12345	9/28/2011	2/7/2023	☒

Lastly, the company administrator needs to ensure that all data sheets to transfer are in the organization unit to split off. This means that in addition to the top node of the MDS, all own and received referenced nodes are also in the Org Unit. MDSs (both own and received) can be moved through the Administration > MDS Admin menu option.

Type	Name	Part/Item No.	Item- /Mat.-No.	Material No.	ID / Version	Supplier
Total records found: 0						

Completing the Planner

Once the new company structure is defined, you can now complete the Company Split Off 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 contact person in the source company and a contact person in the target company (must have company administrator profile) and certify that all users have been communicated with.

1. Contact Person Source Company	
Name	
Phone incl. international Country Code	
E-Mail	
Country	
2. Contact Person Target Company	
Name	
Phone incl. international Country Code	
E-Mail	
Country	
3. All impacted companies that are listed in this document are informed and agree	
☐ Yes	
☐ No	

Why a Contact Person?

It is very rare that a Split Off will complete without questions arising. During the actual Split Off, the contact person **MUST** be available should there be any questions on the move. The actual Split Off timing will be 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 Split Off and the company they log into after the

Split Off will look different. Some of their User IDs may change. At a minimum, there will be fewer data sheets in the search, sent, and received. Users may need to know how to use the Org Unit filters on these screens and they will need to tell their suppliers to send to a different company ID.

A company administrator can find a list of users in their own IMDS company through the Administration > User function.

User Org Unit Assignment

It is important, especially if your company has modules, to ensure that users are correctly assigned to the Org Units – all users that should be moving are assigned to the Org Unit and all users that are not moving are not assigned to the Org Unit.

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 table for the Migration Rules is depicted in the following figure:

6. New company setup and existing company migration rules

Hint: The ID and name of an org unit of the source and target company (columns 3, 4 and/or 8, 9) must match the root company ID and root company name (columns 1, 2 and/or 6, 7) if no org units are involved.

[illegible]

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.

The method used to get source and target IDs is described in a previous section.

How to handle data that cannot be moved?

This question relates to whether you will keep the source Org Unit active after the Split Off in case there is data that cannot be moved that you want to move manually:

7. If not all MDSs can be transferred during the Split Off procedure, do you wish a reactivation of the Source Org Unit ID after the Split Off?

☐ Yes

☐ No

Please be aware that users assigned to non-transferable MDSs reside in the source company with their user ID plus an appended "a" after the Split Off. In the target company they will maintain their existing user ID. For example, if **gabcd001** owns a datasheet that cannot be moved, the user assigned to **gabcd001** will have 2 user IDs after the Split Off – **gabcd001** in the target company and **gabcd001a** in the source company. It will be the responsibility of the company administrator of the source company to deactivate gabcd001a when access to the source company is no longer needed.

Comments

If you have any comments or instructions on the reorganization, use the corresponding field to let DXC know.

8. Please enter any comments

Signatures

Please make sure, that all companies listed in your planner belong to you and that representatives of these companies are informed. For legal purpose, we need the signature of the source company representative and the target company representative. Without these signatures, DXC will not perform the Split Off activities.

Date and Signature (Source Company) With this signature I will be agreeing to the accompanying IMDS Company Reorganization Terms and Conditions; and I certify that all information contained in this document is true and accurate.
Date and Signature (Target Company) With this signature I will be agreeing to the accompanying IMDS Company Reorganization Terms and Conditions; and I certify that all information contained in this document is true and accurate.

Procedure

When you have filled out the Company Split Off Planner please send it via e-mail to mds-solutions@dxc.com. After receiving your Company Split Off Planner, we run analysis 1. After the first analysis run you will receive the Split Off result showing the amount of data to transfer. If the analysis indicates that less than 100% of your own data can be moved, you will receive a report called OwnInhibitors.csv. This report shows MDSs blocking other MDSs from being transferred because of references.

It's up to you to work through this report and perform the steps described in the section 'How to improve Split Off results'. This will increase the number of MDSs transferred by the Split Off process. After your moves have been made, you may request a second analysis.

Based on the results of the (second) analysis, DXC will provide a proposal for the Split Off. If you accept this offer, please send your signed **Company Split Off Planner** combined with a **binding Purchase Order** (with Tax Identification number) via Fax to:

EntServ Deutschland GmbH – IMDS Advanced 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@dxc.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

Your Split Off will be scheduled and processed as soon as resources are available and at a mutually agreed upon time. Please be aware that during the time the split is being processed, no users of the affected companies can be working in IMDS. Furthermore, it is necessary, that during processing time the contact person is available in case there are any questions. It is also necessary that the contact person checks all data immediately after the process is complete.

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.com/technology)