



CDX Company Merge Guide

Version 1.1

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Introduction

The CDX Company Merge Service allows you to combine multiple existing CDX company registrations into a single CDX company. If needed, former companies can be represented as Organization Units within the new company structure. This helps reduce administrative effort and keeps your company setup consistent.

Prerequisites

- At least one active CDX user with Company Administrator rights from the company or companies involved.
- The target company structure should be defined in advance.
- Required users should be created before the merge starts, to ensure correct access after completion.

Involving a Company Administrator who is familiar with the company structure helps ensure the merge is completed efficiently and correctly.

Standard Scope

The Company Merge Planner provides a standardized merge process at a fixed price. It covers typical merge scenarios, such as consolidating several CDX companies into one main company.

Requests Outside the Standard Scope

If your request includes additional activities (for example, merging more than 20 companies or moving data within a company), please contact cdx-info@dx.com with a detailed description of your requirements. DXC will review your request and provide a customized offer. Additional costs may apply.

Additional Information

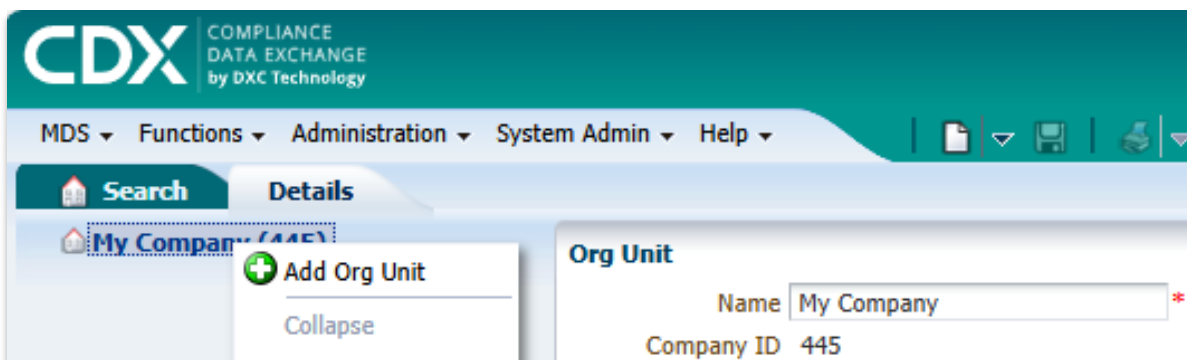
Instructions for creating company structures and managing users can be found in the CDX [User Manual](#), in the sections: Company Administration / Organization Units / User Management.

Please follow the provided instructions carefully to ensure a successful merge.

How to Fill Out the Company Merge Planner

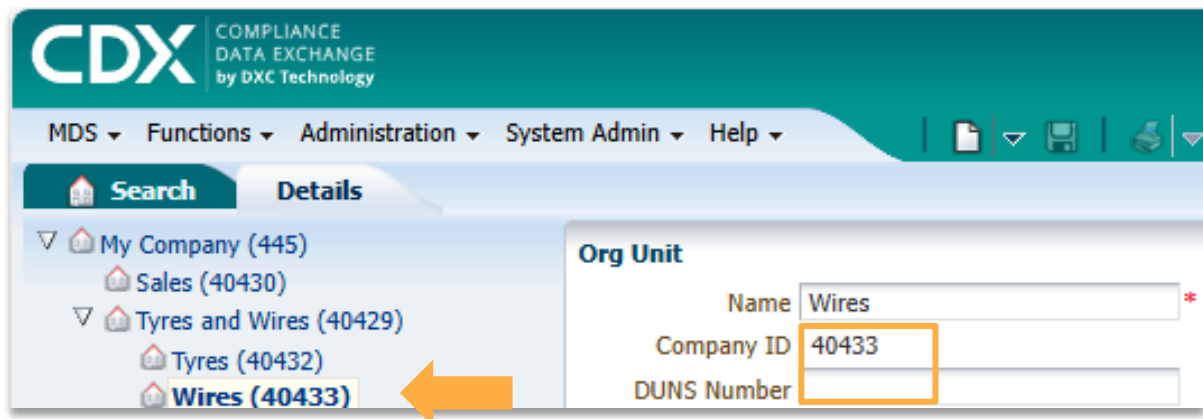
Preliminary Work

To initiate the company merge process, the company administrator needs to define the target company structure. This can be achieved by either enhancing the structure of an existing CDX company or creating a new target company through online registration (or manual registration if any issues arise). If desired, Org Units can be added to the structure, similar to creating an MDS (Material Data Sheet) structure. The process involves using the “+ Add Org Unit” button, as shown in the example below:



When creating your company structure in CDX, keep the following guidelines in mind:

- Depth of Structure:
 - You can create a structure with up to 9 levels. This allows for a hierarchical arrangement of Org Units within your company.
- Unique Names:
 - Each Org Unit should have a unique name. This ensures clarity and avoids confusion within the structure.
- Name Length:
 - While the system allows for Org Unit names of up to 50 characters, we recommend keeping them concise for better display. Ideally, aim for a name length of no more than 20 characters to ensure readability in search results.
- Finalize and Save:
 - Once you’ve organized the structure to your liking, make sure to save it. This ensures that your company setup is accurately reflected in CDX.



When using the **Company Merge Planner**, it's essential to provide the **Org Unit IDs**. You can locate these IDs in the following ways:

- The Org Unit ID is typically positioned directly behind the name of the Org Unit. Look for it within the Org Unit details.
- Alternatively, if you highlight the Org Unit, you can find its ID in the “**Details > Org Unit**” information.

Remember to include these IDs accurately to ensure a smooth company merge process.

Completing the Company Merge Planner

After defining the new company structure, you can proceed to complete the Company Merge Planner. You'll require the exact company and Org Unit names and IDs for both the source companies and the target company structure.

1. Migration Rules

The first step involves detailing the migration rules, specifying what data is moving from where to where. Let's clarify the terminology:

- The **source** refers to the company ID or Org Unit ID from which data is moved.
- The **target** represents the receiving company ID or Org Unit ID.

The Company Merge Planner is designed for scenarios where all data from the source company is moved. However, if only a subset of the data needs to be transferred (for instance, specific Org Units), that falls under a **Company Split-Off**.

Please provide the following details explicitly in the Company Merge Planner:

- ID and name of the source company.
- ID and name of the target company.

You can retain the IDs of the source company and its Org Units (see FAQs).

1. New company setup and existing company migration rules

[illegible]

2. Define the contact person for the company merge

It's important that the designated contact person remains available in case any questions do come up during the merge process. The actual timing for the merge will be coordinated between the DXC developer and the designated contact person.

2. Contact Person

Name	
Phone	
Email	
Country	

3. Certify that all users have been informed about the merge process.

As part of the company merge process, the designated contact person plays an important role in communicating with users across all impacted companies. Here are some important points to consider:

- **User Access During Merge:**
 - Users from the source company should **avoid accessing CDX** during the merge.
 - After the merge, the company they log into will appear different, and some user IDs may change.
 - Users may notice an increased number of datasheets in the search, sent, and received folders..
- **Understanding Org Unit Filters:**
 - Users may need guidance on how to use **Org Unit filters** on various screens.
 - Helping users become familiar with these filters can support effective navigation of the new company structure.
- **Supplier Communication:**
 - Users should inform their suppliers to send data to the **correct company ID** post-merge.
- **Avoid Merging Joint Ventures:**
 - Joint venture CDX companies are generally not suitable for merging
 - Data in joint ventures is also owned by another company, and joint ventures may not always be permanent.
- **User Lists for Company Administrators:**
 - Company administrators can find lists of users in other CDX companies using the “**Administration > Trust User**” function.
 - To locate users within their own CDX company, administrators can use the “**Administration > User**” function.
 - Note that users in their own company won’t appear in the “Trust User” search; this function serves a different primary purpose.

3. Confirmation from affected companies/org units

All affected companies and organizational units mentioned in this planner have been informed and have agreed.

☐ Yes ☐ No

4. Usage of IMDS Connect (only for IMDS Users)

4. IMDS Connect License Usage (Only to be answered by IMDS users)

Do any of the companies mentioned in this request use an **IMDS Connect License**?

☐ Yes ☐ No

5. Define your “Deny List”

Following a company merge, there may be cases where users are unaware of the new company structure and attempt to register additional CDX companies. To help you maintain control over your CDX processes, we offer a “deny” list. In this list, you can specify names or character strings that users are not able to use for online registrations.

For example:

- If “XYZ” is on the deny list, users won’t be able to register variations like “XYZUS” or “XYZ US.”
- However, clever users might still find ways to register similar strings, such as “X Y Z,” “X.Y.Z.,” or “X&YZ.”

While it’s not a perfect solution, it does contribute to better control. If anyone wishes to register a company with a string from the deny list, the registration is handled via manual registration through the CDX Service Center (Helpdesk).

5. Company names / character strings to be blocked

Please list the company names or character strings related to your company that should be blocked for new online registrations. (This does not prevent registrations submitted through the CDX Service Desk.)

Example: If you enter “XYZ”, any company name containing “XYZ” will be blocked from online registration.

6. Comments

Feel free to include any additional directions or specific requests in the designated comments section.

6. Please enter any comments

7. Sign, Date and Finishing Up

Once you've completed the Company Merge Planner, please sign it and send it via email to cdx-info@dxc.com to initiate the merge process.

7. Signature & Date

By signing below, I confirm that I agree to the [CDX Company Reorganization Terms and Conditions](#) and that all information provided in this document is true and accurate.

Date and Signature

Frequently Asked Questions

Can I retain my original CDX Company IDs?

Certainly! In a standard company merge, the process involves moving all data from one company to another and subsequently deleting the source company. This applies not only to the “roof” company but also to all its organizational units.

However, if the structure of the source company needs to be transferred to the target company, a double merge is necessary. Here’s how it works:

- Data Transfer to Temporary Company:
 - Initially, all data from the source company is moved to a temporary company.
 - This step ensures that the original source company remains intact during the reorganization process.
- Company Structure Transfer:
 - Next, the company structure (including Org Units) is transferred from the source company to the target company.
 - The IDs of the source company and its Org Units are preserved in this transfer.
- Final Data Migration:
 - Finally, all data from the temporary company is moved to the target company.
 - Keep in mind that the effort involved in this double merge is doubled, which also affects the associated costs.

By following this approach, you can achieve the desired company setup while maintaining the integrity of your data and organizational structure.

How does the Company Merge work?

DXC facilitates the movement of various data components during company merges within CDX. These components include datasheets, MDS requests, users, and contact persons. If only a subset of data needs to be transferred, it is considered a company split-off and falls under a separate service.

To ensure accuracy, the Company Merge Planner mandates the use of company IDs and Org Unit IDs in addition to the company or Org Unit names. All data movement adheres to the guidelines set by the Company Merge Planner.

When multiple source companies have received the same datasheet (e.g., identical MDS ID/version), the datasheet is assigned to the target Org Unit or the “roof” company based on the merge sequence, if not already present. Company administrators can later allocate these datasheets to the appropriate Org Unit.

During the move process, it’s crucial that the contact person specified in the Company Merge Planner remains available to address any issues that arise.

Upon completion, the source company or Org Unit will be deleted.

Additionally, we recommend preventing future online registrations by employees who have not been informed about the merge. You can request that specific names related to your company be added to the “deny list.” For instance, if “ABC” is on the deny list, no one can register online with the character string “ABC” in the company name.

Please verify that all companies listed in your planner belong to you and ensure that representatives of these companies are informed. We strongly advise against merging CDX companies that represent joint ventures. It is the responsibility of the person requesting the merge to communicate with all users about the process. Consider using the “Administration > Trust User” and “Administration > User” options to locate users within your companies. (“Administration > Trust User” returns users from other CDX companies, while “Administration > User” returns users within the company you are currently logged into.

Further Support

For administrative or technical questions, please contact: cdx-info@dxc.com

The CDX Company Reorganization support team will respond as soon as possible.

Contact Information

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CDX

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