



CDX Company SplitOff Guide

Version 1.1

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Introduction

The CDX Company SplitOff Service allows you to separate specific data from an existing CDX company and transfer it into another CDX company. This is typically required when product lines, sites, or business divisions are sold or reorganized. The SplitOff service helps ensure that data is cleanly separated, company structures remain consistent, and administrative effort is minimized by using a standardized, well-defined process.

Prerequisites

- At least one active CDX user with Company Administrator rights from the source company (and target company, if applicable).
- The data to be split must already be organized within one or more dedicated Organization Units (Org Units).
- The target company structure should be defined in advance.
- Required users in the target company should be created before the SplitOff starts, to ensure correct access after completion.

Involving a Company Administrator who is familiar with the company structure and data organization is recommended to ensure the SplitOff is completed efficiently and correctly.

Standard Scope

The Company SplitOff Service provides a standardized separation process at a fixed price.

The standard scope includes separating data that resides within defined Org Unit(s) from an existing “roof” company and transferring it into another “roof” company. It is the responsibility of the CDX Company Administrator in the source company to ensure that all relevant data is correctly located within the affected Org Unit(s) before the SplitOff process begins.

Requests Outside the Standard Scope

If your request includes additional activities, such as moving datasheets into Org Units, transferring more than 10,000 MDSs, or splitting more than 10 Org Units, please contact cdx-info@dxs.com with a detailed description of your requirements.

DXC will review your request and provide a customized offer. Additional costs may apply, as these activities are not covered by the standard SplitOff service.

Additional Information

Instructions for creating company structures, managing users, and moving data between Organization Units can be found in the CDX User Manual, in the sections:

Company Administration / Organization Units / User Management / MDS Admin.

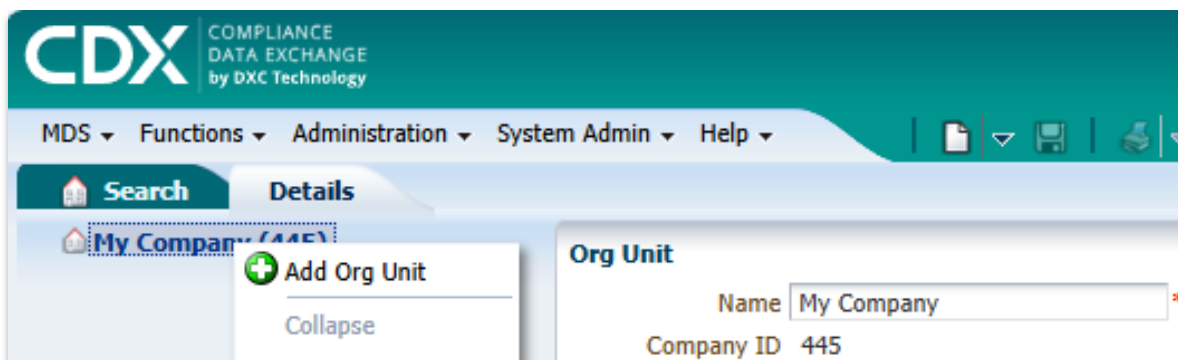
Please follow the provided instructions carefully to ensure a successful SplitOff.

How to fill out the Company SplitOff Planner?

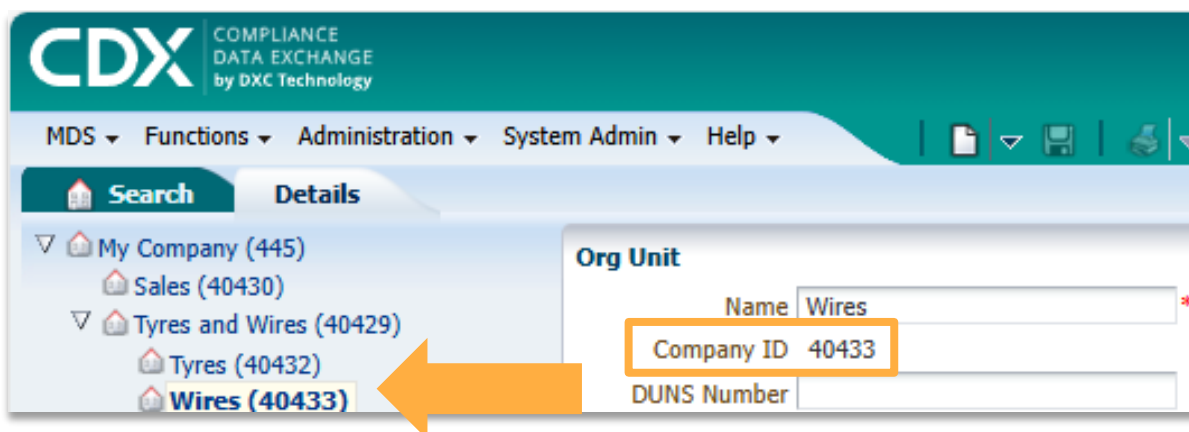
Preliminary Work

Target Company Existence: The company administrator must verify that a target company exists. It's not possible to use companyIDs or Org UnitIDs from the source company as the target companyID. If the target company doesn't exist, the Client Manager should create it either through Online Registration or Manual Registration via Service Centers if needed.

Creating the company structure: The company administrator can add Org Units to the structure of the CDX target company or create a new target company through online registration (or manual registration if there are issues). To add Organization Units (Org Units), follow a similar process as creating an MDS structure by selecting the "+" button:



- You can create a structure up to 5 levels deep.
- Each Org Unit must have a unique name.
- While up to 50 characters are allowed, we recommend keeping the Org Unit name within 20 characters due to display limitations in search results.
- Once you have the desired structure, remember to save it.



Org Unit IDs: In the Company Planner, you must provide the Org Unit IDs. You can find the ID directly behind the Org Unit name or, when you highlight the Org Unit, in **Details > Org Unit information** (circled in red above).

User Assignment: The company administrator needs to ensure correct user assignment to the organization unit(s) for SplitOff. This is crucial because Modules are not directly assigned to any organization unit. The only way to select Modules is by identifying them through the user who created them. If a user is assigned to the SplitOff organization unit, all Modules created by that user will be selected during the analysis job.

User ID	Last name	First name	Organisation unit	Telephone No.	Valid until	Valid as of	active
jbubb001	Busch	Boris		+49 602 6554	1/13/2027	7/12/2018	☒
jbuhh001	Hummer	Hilde	Busch USA	+49	10/2/2026	9/11/2024	☒
jbumm001	Müller	Max	Busch Einkauf	+49	7/11/2026	9/11/2024	☒

- The company administrator must ensure that all data sheets to transfer are within the organization unit designated for SplitOff.
- This includes not only the top node of the MDS but also all own and received referenced nodes within the Org Unit.
- To move MDSs (both own and received), use the Administration > MDS Admin menu option.

2. Define the contact person for the source company

During the actual SplitOff, the contact person must be available in case there are any questions regarding the move. The timing for the actual SplitOff will be arranged between the DXC developer and the designated contact person.

2. Contact Person Source Company

Name	
Phone	
Email	
Country	

3. Define the contact person for the target company

During the actual SplitOff, the contact person must be available in case there are any questions regarding the move. The timing for the actual SplitOff will be arranged between the DXC developer and the designated contact person.

3. Contact Person Target Company

Name	
Phone	
Email	
Country	

Responsibilities During SplitOff:

- The designated contact person must communicate with users across all impacted companies.
- Users will be unable to access the system during the SplitOff process.
- After the SplitOff, the company they log into will appear different.
- Some User IDs may change.
- Expect fewer data sheets in search, sent, and received sections.
- Users should learn how to use Org Unit filters on relevant screens.
- Suppliers need to send MDS to a different company ID.

Finding User Lists: Company administrators can access a list of users within their own CDX company through the **Administration > User** function.

4. Confirm that all users have been informed about the SplitOff

4. Confirmation from affected companies/org units

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

☐ Yes ☐ No

5. User Org Unit Assignment

Ensure correct assignments: If your company uses modules, it's crucial to verify that users are accurately assigned to the relevant Org Units.

Moving users: Assign all users who should be moving to the moving Org Unit.

Non-moving users: Ensure that users who are not moving are not assigned to the Org Unit.

5. Correct Assignment of Users to Organizational Units

All users are correctly assigned to the organization unit(s) to split off.

☐ Yes ☐ No

6. Select the analysis run mode

6. Please select the analysis run mode

Mode 1: Includes all datasheets belonging to these organization unit(s)

Mode 2: Includes all items of the Mode 1 analysis as well as all datasheets created by users of the organization unit(s) to be split off that are not assigned to any of these organization unit(s)

☐ Mode 1 ☐ Mode 2

7. Indicate a User ID of the Source Company as default User ID

If there are MDSs that could move but the user who created them is not assigned to the Org Unit, a default User ID should be provided:

7. Please indicate a User ID of the Source Company as default User ID

The default user ID must be from a user assigned to an organization unit that is moving. It is used for ownership of all datasheets currently owned by a user that will not be moving.

Default User ID: _____

8. Reactivation of Source Org Unit ID

8. Reactivation of Source Org Unit ID (If Data Sheets Remain Untransferred)

If not all MDS can be transferred during the SplitOff procedure, do you wish a reactivation of the Source Org Unit ID after the SplitOff?

☐ 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 SplitOff. 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 SplitOff – 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.

9. Comments

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

9. Please enter any comments

10. Sign, Date and Finishing Up

Ensure that all companies listed in your planner belong to you. Inform representatives of these companies about the SplitOff process. For legal purposes, obtain the signatures of both the source company representative and the target company representative.

10. 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

Procedure

- Please fill out the Company SplitOff Planner and send it via email to CDX-info@dxc.com.
- Upon receiving your planner, we will run the initial analysis.
- After this first analysis, you'll receive the SplitOff result, indicating the amount of data to transfer.
- If the analysis shows that less than 100% of your data can be moved, you'll receive a report called "OwnInhibitors.csv". This report identifies MDSs blocking transfers due to references.
- Work through the report using the steps outlined in the section "How to Improve SplitOff Results". This will increase the number of MDSs transferred during the SplitOff process.
- Once your moves are complete, you can request a second analysis.
- Based on the results of the (second) analysis, DXC will provide a proposal for the SplitOff.
- If you accept the proposal, send your signed Company SplitOff Planner along with a binding Purchase Order (with Tax Identification number) via email to cdx-info@dxc.com

Note:

Your SplitOff will be scheduled and processed once resources are available and at a mutually agreed-upon time.

During the split process, no users from the affected companies can work in CDX.

The designated contact person must be available during processing in case of any questions.

After completion, the contact person should verify all data immediately.

Frequently Asked Questions (FAQs)

Can the original Org Unit ID be kept?

Yes, the IDs of the affected source Org Units can be retained. To achieve this, DXC should transfer all movable datasheets associated with the impacted Org Unit to a temporary company.

Next, any remaining non-transferable datasheets should be moved to the “roof” (source) company. Users who are still assigned to the Org Units must be unassigned during this process.

Once the above steps are completed, the Org Units can be moved to the target company.

After the Org Units have been successfully moved, all data from the temporary company should be transferred to the moved Org Units in the target company.

It’s important to note that as the effort doubles (due to the additional steps), the costs will also double.

How does the Company SplitOff work?

The **SplitOff function** facilitates the transfer of data associated with one or more Org Units from a CDX “roof” company to a different CDX “roof” company. However, it’s important to note that not all data can be moved in most cases. The extent to which data from an Org Unit can be transferred depends on how interconnected or “intertwined” the datasheets are. Here are the primary reasons for blocking data transfer:

- Datasheets that **reference minor versions** of remaining data.
- Datasheets that have the **same module ID** as remaining datasheets.
- Datasheets that are **referenced by minor versions** of remaining data.

For instance, consider a scenario where your company has created a set of MDSs used by all Org Units. In such cases, there may be MDSs that rely on these common MDSs. These interconnected dependencies can hinder the transfer of data from the Org Unit.

Before actually moving the data, DXC conducts an analysis to determine the amount of data that can be successfully transferred. To perform this analysis, the company administrator

must review the users assigned to the Org Unit(s) scheduled for SplitOff. This step is crucial because modules cannot be directly assigned to an Org Unit. Instead, they must be identified based on the user who created them.

The analysis can be executed in one of two ways:

Mode 1: Includes modules created by assigned users and datasheets assigned to the affected Org Unit.

Mode 2: Expands on Mode 1 by considering datasheets created by users of the Org Unit but belonging to other Org Units or the “roof” company (which are not part of the move).

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%

Received MDSs: No issues here—**100%** of them will be transferred successfully. However, when it comes to **your own MDSs**, be less than 100% will be transferred.

If you wish to enhance the results of the analysis, follow the instructions in the chapter titled “How to Improve SplitOff Results?” Once the affected data has been updated to improve the transfer rate, further analysis can be conducted. This subsequent analysis will reveal whether the actions taken were successful.

Transfer rules

- Upon completion, the source Org Unit(s) will be deactivated.
- Users assigned to non-transferable MDSs will remain in the source company with their original user ID, followed by an “a” after the SplitOff execution.
- In the target company, they will maintain their existing user ID.
- For instance, if gabcd001 owns a datasheet that cannot be moved, the user assigned to gabcd001 will have two IDs:
 - gabcd001 in the target company.
 - gabcd001a in the source company.
- It will be the responsibility of the source company administrator to deactivate gabcd001a when access to the source company is no longer required.

Suggestions for data that cannot be moved

If data cannot be moved, the **target company’s administrator** may collaborate with the **source company’s administrator** to retain access to the source Org Unit after the SplitOff process. In such cases, users can send or propose a non-transferrable datasheet to

the target company. By copying it there, the datasheet becomes an **independent** one that can serve as the foundation for future versions.

Why can't data be transferred?

The amount of transferable data depends on how intertwined or “referenced” the data is. Ultimately, a “referenced” datasheet must reside in only one company—it cannot exist simultaneously in two CDX companies. Here are the scenarios:

- If an MDS that is to be transferred and an MDS that will stay both reference the same datasheet, the MDS 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 is if the “referenced” MDS is published.

How to improve SplitOff results?

After the initial analysis, you will receive the **SplitOff result**, indicating the amount of data that can currently be moved.

In the example from a previous section, the analysis reveals that **100%** of the **received MDSs** can be moved, but only approximately **57%** of the **own MDSs** (data created by your company) are eligible for transfer. Along with your results, you will receive a report named **OwnInhibitors.csv**. This report highlights MDSs that block other MDSs from being transferred due to references.

The following table explains the information presented in the report:

Column	Value
Node ID	
CDX ID / version	
MDS	Datasheet
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 CDX ID / Version	Module ID/Version of MDS that cannot be moved
Inhibitant Name	Name of MDS that cannot be moved

So how to improve?

- **Check Company IDs:**
 - Begin by examining the “**Company-ID**” column in the report.
 - Ensure that all MDSs mentioned in the report are indeed part of the **Org Unit to be transferred**.
 - If any MDSs are missing from the Org Unit, the company administrator can use **Administration > MDS Admin** to **move** those MDSs into the correct Org Unit.
 - Remember that **modules** only reside in the “**roof**” ID.
- **Review MDS Dependencies:**
 - Take a closer look at all the MDSs listed in the report.
 - Check if any of these MDSs **reference other MDSs** (blocking MDSs).
 - If you find any blocking MDSs, consider replacing them with **non-blocking MDSs** if possible.
- **User Assignment Verification:**
 - Review the **user assignments** within the Org Unit.
 - Ensure that all users are correctly assigned.
 - Keep in mind that this assignment directly influences the number of **modules** selected for the analysis run.
 - Modules are attributed based on the **creating user** within the Org Unit.

What to do with non-transferable own MDSs?

The sole method to move non-transferable MDSs to the target company involves manual steps:

- **Copy the MDSs:** Manually copy the non-transferable MDSs.
- **Set Forwarding Permission:** Mark “yes” in the recipient data for “Forwarding allowed.”
- **Send to Target Company:** Send these MDSs to the target company.
- **Accept in Target Company:** Accept them in the target company.

Keep in mind that if you have a substantial number of non-transferable MDSs, you might require access to this data later. Consequently, requesting the reactivation of your source Org Unit after the SplitOff procedure becomes necessary.

Further Support

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

The CDX Company Reorganization support team will post a reply to your questions as soon as possible.

Contact information

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Germany

CDX

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