



The Most Important Tool in Your Material Compliance Efforts!

Collection of Material Declaration from Suppliers is the core activity behind all material compliance programs. Yet these efforts are often missing the most important tool needed to be successful.

Presented by RoHS Ready LLC

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Welcome to the Webinar

The Most Important Tool in Your Material Compliance Efforts!

- **Audio Conferencing**

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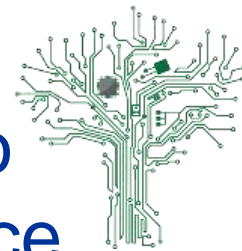
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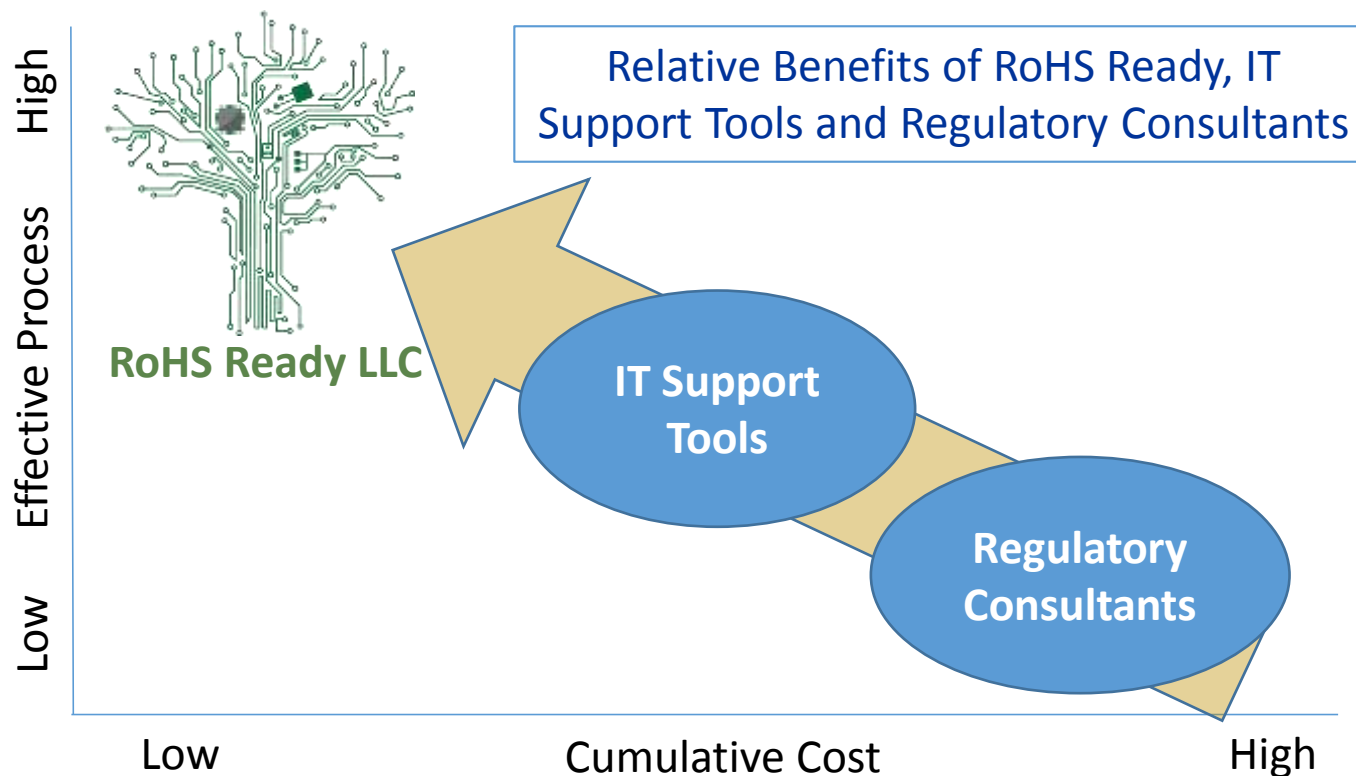
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RoHS Ready provides Clients assistance to implement timely, and cost effective substance compliance projects, for RoHS, REACH, Battery, Packaging, & Conflict Minerals.





Jim Kandler

Managing Director - RoHS Ready LLC



jim@RoHSReady.org

Led the GE Healthcare Sourcing effort to collect data for 250,000 parts

Worked with business team members to set up company-wide procedures.

Started team that collected 150,000 declarations from 6,000 suppliers

Utilized tools: BOMcheck , PTC InSight, Dassault ENOVIA MCC, Gensuite PCC

Efforts included RoHS, REACH, and Packaging

Member of IPC-1752A Committee to further develop the IPC-1752A Standard.

Discussing Material Declaration Collection from Suppliers



Need to get material declarations for all parts and suppliers

- Standard approach for most OEMS, not lab testing
- Audits do not provide compliance evidence
- The Last suppliers to respond are the RISKY ONES.
- A Full Material Declaration is preferred since it is usable for many different regulations



MANY Sources of Addition Parts that Require Declarations

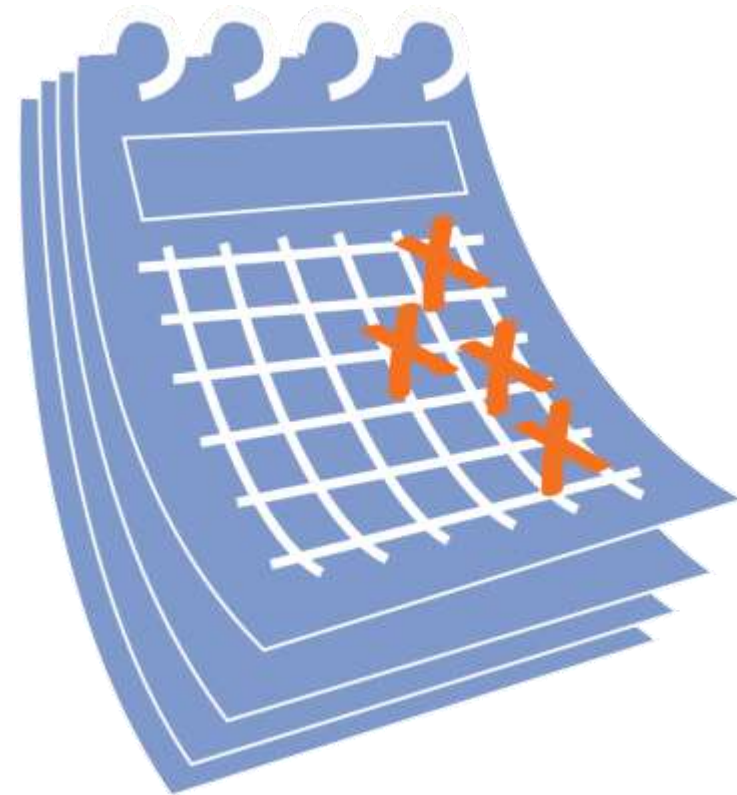
- Product Conversion to Material Compliance
- Product Sustaining efforts – End-of-Life parts
- Product Enhancements / Update
- Product Cost Reductions
- Supplier Consolidations
- Supplier Replacement
- Customer Requests
- New Product Development
- Expired Exemptions





MANY Different Need Dates

- Product Conversion to Material Compliance
- Part End of Life phase out
- Product Cost Reductions
- Product Enhancement launch
- Supplier Consolidation phase in
- 45 days for Customer Requests
- New Product Launch date

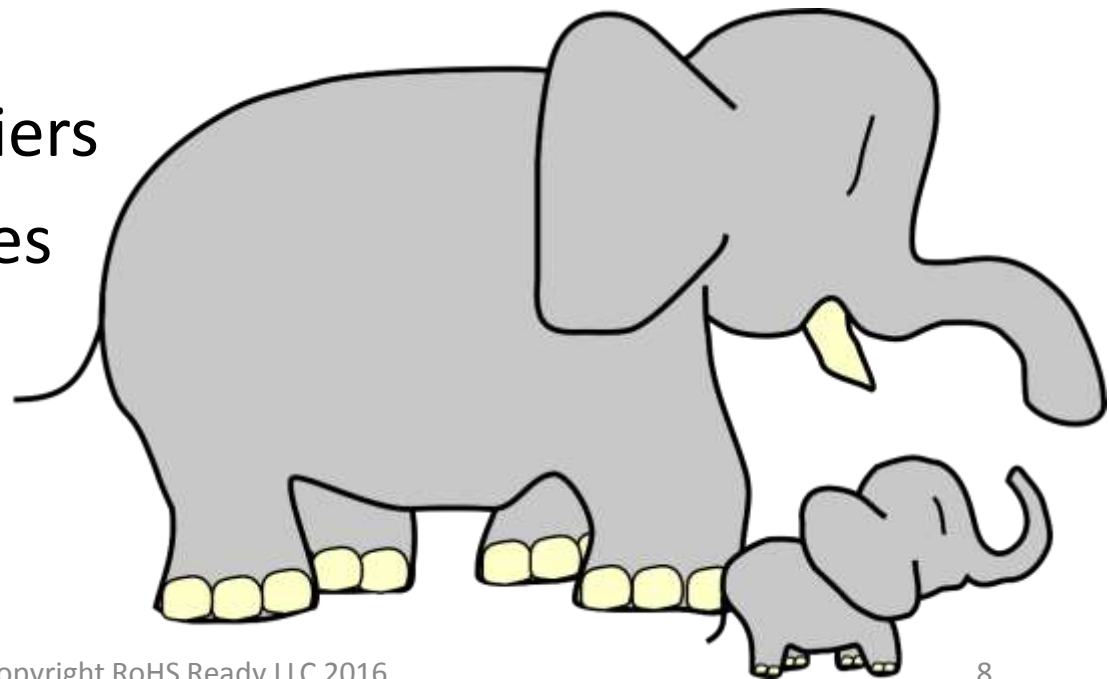




Each Material Declaration Part Effort is Different

Not All Declaration Requests Will Be Completed With the Same Effort or At the Same Time

- Knowledge level variations
- Few vs many parts
- Few vs many suppliers
- Short vs long queues

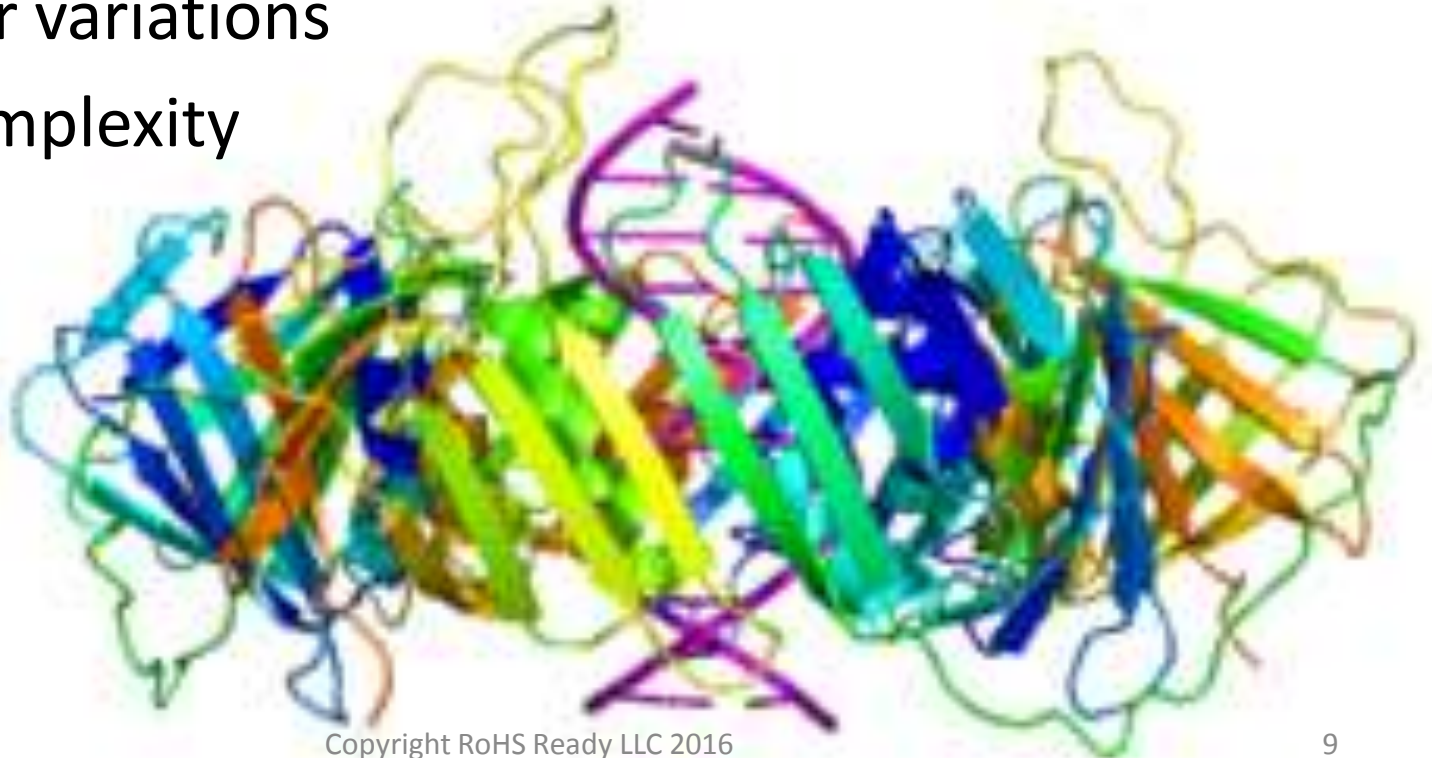




Tracking Progress of Collection can be Complex

Lots of variations

- Many Sources of requests
- Supplier variations
- Part complexity
- Timing





Cut Through All of the Noise

Use a single list to manage all of the data for the parts that require declaration collection efforts.

Call it a tracker, work list, Excel spread sheet, or other name.

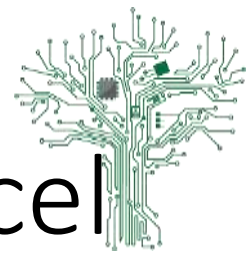
Put all of the regularly used information into one location, and update as things change.





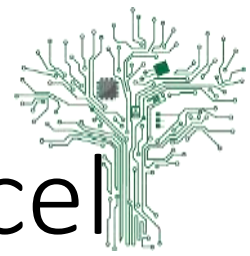
Excel is a Great Application to Host Your List!!!

- Allows organization of parts and relevant data.
- Updates to data as required are Simple
- You can adhoc filter and sort to obtain whatever report or status update is needed.
- You can even VLOOKUP this data to the Product Parts Lists to see the status of all of the parts of the Product.



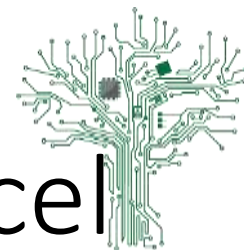
Suggested Row Headings for Excel

Column Headings	Your Part #	Part Description	Part # Revision
<i>Column Definition / Description</i>	<i>Part number or identifier of the part - as imported from your ERP or PDM</i>	<i>Part description - as imported from your ERP or PDM</i>	<i>Part revision - if applicabl e</i>
<i>Sample Line item</i>	<i>2102-0312-00</i>	<i>LABEL, CUSTOM, WHT, 2.76 IN W X 1.78 IN H</i>	<i>7</i>
Preferred notations, when	none	none	none
Preferred notations, when			



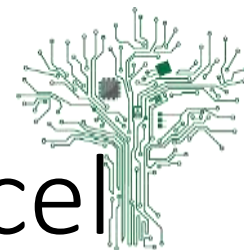
Suggested Row Headings for Excel

Column Headings	Supplier Name	Supplier Principal Name	Supplier/Mfg. Part Number	Supplier Contact Name	Supplier Email	Supplier Contact Phone
<i>Column Definition / Description</i>	<i>Supplier Name for part - as imported from ERP or PDM</i>	<i>Single common Supplier name for sorting and grouping purposes</i>	<i>Suppliers part number</i>	<i>Name of contact person at Supplier</i>	<i>E-mail of contact person at Supplier</i>	<i>Phone # of contact person at Supplier</i>
Sample Line item	Brady	Brady	B-483	J. Green	jgreen@brady.com	414-123-5813
Preferred notations, when	none	none	none	none	none	none



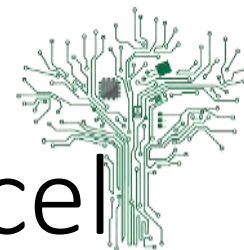
Suggested Row Headings for Excel

Column Headings	from Bill of Material (BoM)	Data Channel	Part Commodity	Supplier Type	Eng. Owner	Part Add Date	Declaration Collection Owner
<i>Column Definition / Description</i>	<i>gives Bill of Material Part # which is parent of the part # (or higher level parent / commercial item / product family)</i>	<i>Use for organizing and selecting most effective data collection method for part / supplier</i>	<i>Use to support grouping and organizing suppliers and parts for data collection efficiency</i>	<i>Use to support grouping and organizing suppliers and parts for data collection efficiency</i>	<i>Engineering design owner for part</i>	<i>Date part added to this list</i>	<i>Assigned data collection owner for part, whether internal or 3rd party</i>
Sample Line item	123456	Self-Declare	Machine & Fab	Fabricator	G. White	15-Mar-2013	S. Blue
Preferred notations, when	none	Out of Catalog Finished Good	Elec Piece Part	Fabricator	none	none	none
Preferred notations, when		Build Assy (Make Item)	Fastener	OEM			
Preferred notations, when		Obsolete End-of-life	Elec-Mech Comp	Distributor			
Preferred notations, when they apply		Out of Scope	Plastics	Raw Material OEM			
Preferred		Review for Self-					



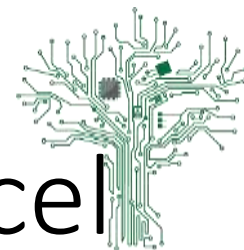
Suggested Row Headings for Excel

Column Headings	Notes	Flow Status	First Request Date	Last Remind Date	RTS Date	Received Date	Completed Date
<i>Column Definition / Description</i>	<i>String of historical progress and exception notes for workflow on part; each entry preceded by date, with most recent at front, keep all entries</i>	<i>Workflow phase status for data collection on part</i>	<i>Date of request sent to Supplier for data</i>	<i>Date of most recent Reminder notice sent to Supplier</i>	<i>'Return to Supplier' Date - Date at which schedule deadline tracking of Supplier response should re-start. Invoked when Supplier has question, issue or negotiated additional time to respond</i>	<i>Date data received for review</i>	<i>Date data has been uploaded to database and is reviewed and accepted</i>
Sample Line Item	1Dec2015: SDoC received from jgreen; 4Sep2015: Clarified to supplier if exemption	Stored	10-Aug-2014	29-Nov-2014	30-Nov-2014	1-Dec-2014	3-Dec-2014
Preferred notations, when	none	Finished Good	none	none	none	none	none
Preferred notations, when		Build Assy (Make Item)					
Preferred notations, when		Obsolete					
Preferred notations, when they apply		Out of Scope					
Preferred		Review for					



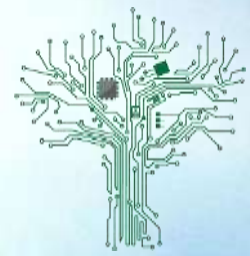
Suggested Row Headings for Excel

Column Headings	RoHS Status	RoHS Exemptions (if Applicable)	RoHS regulation reported against	RoHS Data Type	RoHS Declaration Reported Date	RoHS Declaration File Name in Archive
<i>Column Definition / Description</i>	<i>Record of parts' RoHS compliance status</i>	<i>RoHS exemption indicated if invoked</i>	<i>Which if the regulation variations is reported</i>	<i>Type, Class, Format of declaration provided. Enables tracking to goal of preferred FMD.</i>	<i>Suppliers creation date of RoHS data (Note - NOT the delivery date)</i>	<i>Pointer to the Achived declaration</i>
Sample Line item	PASS	none	EUROHS-0508	SDoC - Letter	23-Nov-2014	12345.PDF
Preferred notations, when	Unknown	none	EUROHS-0508	FMD - Class A_D	none	none
Preferred notations, when	PASS		IEC_62474-D5.00	FMD - Class D		
Preferred notations, when	PASS w Exemption		JIG-101_Ed_4.1-	MD - Class A_C		
Preferred notations, when they apply	PASS w Exemption (future expiry)		JIG-101_Ed_4.1-	MD - Class C		
Preferred						



Suggested Row Headings for Excel

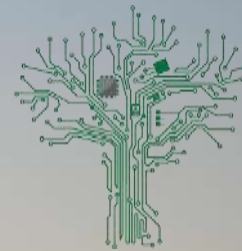
Column Headings	REACH Status	Regulation reported against	REACH Data Type	Declaration Reported Date	Declaration File Name in Archive
<i>Column Definition / Description</i>	<i>Record the parts' REACH reporting / compliance status.</i>	<i>ECHA version of SVHC list used in the parts' REACH reporting / compliance status</i>	<i>Capture and tracking of type / format of data provided. Enables tracking to goal of preferred FMD.</i>	<i>Suppliers creation date of REACH data (Note - NOT the delivery date)</i>	<i>Pointer to the Achived declaration</i>
<i>Sample Line item</i>	<i>No SVHC Present</i>	<i>EUREACH-1214</i>	<i>SDoC - Letter</i>	<i>23-Nov-2014</i>	<i>12345.PDF</i>
Preferred notations, when	Unknown	EUREACH-0110	FMD - Class A_D		
Preferred notations, when	No SVHC Present	EUREACH-0310	FMD - Class D		
Preferred notations, when	No SVHC > 0.1%	EUREACH-0610	MD - Class A_C		
Preferred notations, when	SVHC Present	EUREACH-0611	MD - Class C		
Preferred notations, when		EUREACH-0612	MD - Class A		
Preferred notations, when		EUREACH-0613	SDoC - Letter		
Preferred notations, when		EUREACH-0614	SDoC - Other		
Preferred notations, when		EUREACH-1008	Self-Declare		
Preferred notations, when		EUREACH-1210	Test Report		
Preferred					



Summary

- Organize data from multiple sources into one list
- Update the single list to keep the summary current
- This is a starting point, make changes you need





Questions?



Other Resources www.RoHSReady.org

Presentations

- [Essential Metrics for Materials Compliance Programs](#), presented with Atlas Systems 30 July 2015.
- [Is Your Material Compliance Program Due for an Update?](#), presented as a recorded webinar 16 & 17 June 2015 with iPoint. The [Powerpoint](#) only.
- [Turn Your Environmental Material Compliance into a Business Driver](#), presented 19 & 21 May 2015 as a Webinar, this includes the [Audio](#) as another download file.
- [How to be Successful at Substance Regulation Compliance](#), presented 21 April 2015 as a Webinar, this includes the [Audio](#) as another download file.
- [6 Important Metrics for Managing Materials Compliance Programs](#), February 2015 issue of CERM.
- [Grade A information](#), January 2015 issue of Environmentalist.
- [Have You Observed Issues Collecting RoHS and Reach Compliance Declarations?](#) Presented at CARE INNOVATION 2014, Vienna, 18 November 2014
- [11 Methods You Can Use to Meet the RoHS Declaration Requirement](#) Presented at PTC CAB Meeting, 12 November 2014
- [Collecting RoHS and REACH Declarations is Difficult](#) Presented at IPC and webinar.

LinkedIn Postings

- [RoHS & REACH Supplier Material Declaration Collection is a Process not a Task!](#)
- [4 Things that Most Frequently Blindside Material Compliance Programs](#)
- ["We finished our RoHS effort", this must be a misunderstanding.](#)
- [1 Metric to Determine If RoHS/REACH Declaration Collection Is TOO Slow - Part 1](#)
- [1 Metric to Determine If RoHS/REACH Declaration Collection Is TOO Slow - Part 2](#)
- [1 Metric to Determine If RoHS/REACH Declaration Collection Is TOO Slow - Part 3](#)
- [Environment Efforts Need to Get Beyond Minimal Regulatory Compliance!](#)
- [An observation from LinkedIn "Discussion of methods to obtain all needed RoHS and REACH declarations."](#)
- [Is collecting RoHS or REACH declarations costing your company more to execute than other companies?](#)