

A Practical User Guide for the Anthesis Compliance Data Collection Form (ACDC)v2.0

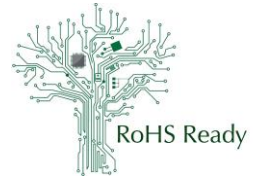


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Overview

RoHS Ready understands the need for manufacturers to effectively and efficiently get their product material data into a standard and usable format for their customers. At the low end on the supplier chain this often means that the manufacturers will not have access to the support tools commonly used by the OEMs. There is an opposition of two needs here: the data needs to be gathered and generated, but the manufacturer has very few support mechanisms and practical knowledge that will help you accomplish this task. Only by enabling the first level manufacturers will the OEM obtain access to the data that they so desperately require.

The Anthesis Compliance Data Collection (ACDC) Excel template is a tool that is most valuable to first and second level part manufacturers to report declarations for their products. This template is Excel based, which is a desktop application most people understand. Behind Excel are macros that are available at the press button to generate the IPC-1752A XML output file that the OEMs import into their material support tools. The Excel or output file is what needs to be attached to an email and delivered

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to the customer's material compliance team or imported into one of the material declaration sharing tools.

Customers of the first level manufacturers are often interested in receiving a material declaration that uses a standard. The ACDC template supports the visual review by a human for those that do not have the material compliance support tools, while still providing full generation of an IPC-1752A or IEC XML formatted declaration. This is a great benefit to the first and second level part manufactures, since they are dealing with customers with a broad variety of maturity in material compliance. While many customers may be asking for an XML there are still some that are stuck asking for a text PDF or another visible format.

Some customers may even be requesting Full Material Declaration (FMD), since this provides the data to support most declarations and is the least likely to require update when regulations change. As the part manufacture gains more maturity themselves they can progress from Class A to Class C, and on to Class D declarations, while still using the ACDC template. Unfortunately for the supplier the Class D appears much more complicated than it actually is. For more information on this please go to; www.rohsready.org/training.

Where are these Templates and Guides available?

The Anthesis Compliance Data Collection (ACDC) Excel template latest version is available at; www.AnthesisCDC.com

A Practical User Guide for Anthesis Compliance Data Collection (ACDC) is available at; www.rohsready.org/training.html. We recommend that you review this before starting to use the template.

Certificate / IPC-1752A Class A

The material declaration certificate is equivalent to the IPC-1752A Class A declaration. The certificate most often contains a statement of Yes the part is compliant to X regulation, No the part is not compliant to X regulation, or some variation of we don't know. The Class A declaration is computer readable when executed in the ACDC.

Substances Yes/No / IPC-1752A Class C

The Class C declaration contains explicit Yes/No statements whether the substances of interest for a specific regulation exist above or below the specified limit. For instance, for a RoHS declaration there would be the 6 RoHS substances indicated, while for REACH there would be the 170 SVHCs indicated. The Class C declaration is computer readable when executed in the ACDC.

Full Material Declaration / IPC-1752A Class D

The FMD is the Class D declaration format. You will be indicating all of the substances in all materials of the part and each of its parts. This complete "bill of substances" can be used by support tools to determine if the part contains substances in concentrations that violate any of the regulations. The IPC-1752A Class D is computer readable output of the FMD data that you entered.

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Setup Your “Quick Start Templates”

Setting up Quick Start Templates or partially completed forms for the common declarations that you make will eliminate time that would otherwise be spent entering the same data again on the original ACDC for each new declaration that you start. Review the Anthesis Compliance Data Collection (ACDC) User Instructions before starting. These are available through the HELP button on the *Business Info* TAB.

The ACDC template is very versatile and utilizes macros. It can be adjusted by you to make any variation of the IPC-1752A classes and IEC XML outputs. Understanding this, it will be important for you to set the parameters that you will use on the template BEFORE entering any data since there are data fields that are not used for Class D (FMD reporting) that are required for Class C (Specific MD reporting). Data fields will be eliminated or entries erased when changes to many settings are made.

Before attempting to use the ACDC template open *Excel > File > Options > Add-Ins >* and *enable Analysis ToolPak – VBA*. Click *OK* to save this selection. This will enable the macros to execute when the buttons on the *Product* TAB are clicked. These are very desirable features. You may see security notices when turning on this Add-in.

Obtain a clean new copy of ACDC template. If this is difficult, go to the *Business Info* TAB and click the *Reset* button. Determine which of the settings indicated below that you will use to make your first quick start template. This quick start template is the one that you will use to make the declarations requested by your supplier or for publishing your declaration in any of the sharing tools. You will need to name the Quick Start template so that you know which Class declaration you are starting with for your new declaration, (i.e. *ClassDdistribution*, *ClassCdistribution*, *ClassAdistribution*)

Settings needed are:

On the *Settings* TAB (*this TAB is to the Left of the Business info TAB*)

- *Export Signing Certificate Path* – this is the location of the signing certificate that can be embedded into the template if you have a certificate. If you have none, then leave this blank.
- *Substance Concentration, Unit* – you can select either *Concentration* or *Mass* in Cell B7. This means that when working on the substances the template will be expecting you to be entering the data of them as either the % concentration of each substance in the material or as the actual mass of each substance in the material. This is important since if you are making your declarations calculating the grams of the substances you will need the setting as *Mass* and if the template is set for *Concentration* the fields will not work for you. See RoHS Ready LLC Training Module #208 for guidance.
- *Substance Concentration, Proprietary* – you can select the allowance for the greatest value of Proprietary substances that are allowed. The original template indicates a maximum of 5%. Some people find that this value does not enable effective use of the template and increase the range to *10% or 15%*.
- *Mass Percent Discrepancy Tolerance* – you can select either the tolerance needed as the substances rollup to homogeneous materials and on up to the Sub Products. The original template indicates a range of *95% to 100%*. Some people find that this does not enable

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effective use of the template and increase the range to 90% to 100%. If you change the range, it should be changed in all three levels identically.

On the *Business Info* TAB

- *Help* – Clicking this Button will take you directly to the Anthesis ACDC Help pages.
- *Clear*– Clicking this Button will reset your form to the original distribute status, any of the Setup changes and data entered will be lost.
- *Template Settings - This form is for distribution purposes...* – Change this box to Yes. The distribution form set to Yes will indicate that the Customer data will NOT be entered on this form. This is data that is not required to generate a usable declaration and is not used by your customer, since they already know who they are. When you change this setting to Yes the Requestor Information section fields below will turn Gray (not required).
- *Template Settings - Class A:...* – Change this box to Yes if you are making a Class A declaration. Do not set Class B, C, or D to Yes. The Class A is the certificate type of declaration.
- *Template Settings - Class B:...* – Change this box to Yes if you are making a Class B declaration. Do not set Class A, C, or D to Yes. The Class B Material Group Declaration is not used.
- *Template Settings - Class C:...* – Change this box to Yes if you are making a Class C declaration. Do not set Class A, B, or D to Yes. The Class C is the Yes/No response for each substance type of declaration.
- *Template Settings - Class D:...* – Change this box to Yes if you are making a Class D declaration. Do not set Class A, B, or C to Yes. The Class D is the Full Material Declaration of all of the substances in all of the materials of the part.
- *Template Settings - Include Manufacturing Info.* – This is most used by EMS companies for their PWA reporting. In most cases you will not use this section.
- *Template Settings - Format(*)* – Verify that *IPC 1752A* is indicated. If not, check in the box and select it from the pull down. *IPC 1752A* is very commonly accepted.
- *Template Settings - Language* – Verify that *English* is indicated. If not, check in the box and select it from the pull down. *English* is the established standard for reporting.
- *Template Settings - Sign Exported XML* – If you indicated the *Export Signing Certificate Path* earlier than change this to Yes, otherwise it should remain No.
- *Legal Statement – Type* - If your legal department has text they want you to use, click the *Type* box and select *Custom*, then paste in your text. Otherwise the Standard text should be used.
- *Legal Statement – Legal Declaration(*)* – This is either the Standard text or the custom text that you can insert.
- *Legal Statement – Supplier Acceptance(*)* – This should be set to Accepted now, unless you will be setting this just before the declaration are sent to customers or your business has set up an acceptance process for draft declarations.
- *Requestor Information* – This section is not required for a declaration and if used would contain received customer information. Leave this section blank.

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- *Supplier information* – Enter you data for the *Company Name(*)*, *Authorized Rep(*)*, *Email(*)*, *Phone(*)*. *Response Date* and *Document ID* will be entered later and ID may not be used if you desire.
- *Field Lock* – This box is not used, keep the text as *No*.
- *Contact Name(*)*, *Contact Email(*)*, *Contact Phone(*)* may be entered now if these will mostly remain the same for all declarations to customers.

This completes your setup of your first Quick Start Templates. Save this template using a descriptive name so that you know which one you are using. Some people may only use 1 template (i.e. *ClassDTemplate* , *ClassDdistributionTemplate* , *ClassCdistributionTemplate* , *ClassAdistributionTemplate*). Save your work often.

If you need variations of this template, you can later open this Quick Start Template and save it as another name and make changes to the Setup above. Remember to make the file name significant and informative.

This is the end of the “Quick Start Templates”, setting up the common settings, and entering your Business Info, which is generic to all of the different types of declarations. Next we will address entering your part data in the specific Class that is needed.

You need to start work on a new declaration

If you need to make a new declaration, find the best match in your “Quick Start Templates” to begin. Open the template and save it while appending the part number to the file name. So the new file name might be 123456ClassDdistribution.

The ACDC template has a tab oriented structure for the product data entries. The product data entry starts with the *Products* TAB, which obviously is where the product level data is entered.

The fields are:

- *Requester Item Number* – optional, may leave blank
- *Requester Item Name*– optional, may leave blank
- *Unit(*)*, this can be Each, cm, cm2, cm3, Liter, Meter, m2, m3
- *Effective Date*, this is the date you made this declaration effective or approved
- *Mfr Site*, which of your sites made the part? Optional
- *Mfr Item Number(*)*, your part number
- *Mfr Item Name*, you name of the part, optional
- *Mass(*)*, weight of the total part, not added packaging
- *UoM(*)*, select either g, kg, mg, massPercent

Don't forget to save the file as your work on your part declaration. The sections below are most often used individually, as you are working on a Class A declaration, or Class C, or Class D. But there are times when you might need to declare Class D, but there is more than 10% of the material that is fully declared. So you might make a Class AD declaration, by checking the A and D on the *Business Info* TAB.

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Entering Your Data for the Class A Declaration

Make sure that the Class A is checked on the *Business info* TAB.

After completing the *Products* TAB, move to the *Query Lists* TAB. You need at least one query list selected. Select the EUROHS or EUREACH list. If you need both copy the row into the row below and select another list. The RoHS query list has 6 possible responses. Select the most appropriate one, then TRUE. The REACH list has only one response. Select the most appropriate of TRUE or FALSE. FALSE indicates REACH substances are used above the limits. Save you work often. There is more help available in the Help Box when clicked.

After completing the *Query Lists* TAB, move to the *Query Exemptions* TAB, if this is a RoHS declaration. If not skip this TAB. Select the appropriate exemption from the Pull Down List. If you select an exemption, then later find it is not needed, you can click Clear to remove it.

The *File References* TAB is optional, and should be used if there are files to attach or reference.

Lastly go to the *Data Summary* TAB to see if there are any problems with the declaration that need to be resolved. If there are not issues to resolve this declaration is ok to export as an XML file.

Save you work often.

There is an example of a Class A Declaration on www.RoHSRead.org/training.html

Entering Your Data for the Class C Declaration

Make sure that the Class C is checked on the *Business info* TAB.

After completing the *Products* TAB, move to the *Substance Category List* TAB. You need at least one Substance Category List. Select the appropriate list. You will need both copy the row into the row below and to generate the level for each substance in the list. For example, the 6 RoHS substances. Click the Category Name and populate a row for each item in each of the lists you selected. Yes, this can be a very long list and you will need to do this for each substance. Save you work often.

Select the correct status for the Above Exemption Column. This will cause things to be enabled to the *Substance Category Exemptions* TAB later.

After completing the *Substance Category Lists* TAB, move to the *Substance Category Exemptions* TAB. Where there are exemptions indicated on the *Substance Category Lists* TAB you will now see the names indicated in the Pull Down List. Make enough Rows for the Substance names to be one in each row. Select the Exemption used for each substance.

The *File References* TAB is optional, and should be used if there are files to attach or reference.

Lastly go to the *Data Summary* TAB to see if there are any problems with the declaration that need to be resolved. If there are not issues to resolve this declaration is ok to export as XML file.

Save you work often.

There is an example of a Class C Declaration on www.RoHSRead.org/training.html

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Entering Your Data for the Class D Declaration

Make sure that the Class D is checked on the *Business Info* TAB.

To the Right of the *Products* TAB you will notice the *SubProducts* TAB. If you want to indicate the parts of your product to your Customer go to the *SubProducts* TAB now. The piece parts of your product are entered on the *Subproducts* TAB. These would be the fasteners, bracket, covers, labels, cables and such. This is optional and not required if the parts do not need to be identified.

To the Right of the *SubProducts* TAB you will notice the *Homogeneous Materials* TAB. Go there now. The materials of the piece parts of your product are entered on the *Homogeneous Materials* TAB. These would be the base metals, finishes, paints, laminates, and such. On the *Homogeneous Materials* TAB you will notice the first column on the Left is labeled *SubProducts*. If you click on Left cell in the row 5 you will see a pull down box that shows all of the *SubProducts* that were indicated.

This is the method used by this template to link the *Homogeneous Materials* to the correct *SubProducts*. You will notice that for each material indicated there has a link back to the *SubProducts*. This same concept is used for the *Substances* TAB. On the *Substances* TAB you will notice the first column on the Left is labeled *Homogeneous Materials*. If you click on Left cell in the row 5 you will see a pull down box that shows all of the *Homogeneous Materials* that were indicated. This is the method used by this template to link the *Substances* to the correct *Homogeneous Materials*. You will notice that for each substance indicated there has a link back to the *Homogeneous Materials*. If the links are missing, then when the XML is not generated.

There is an example file available that will make the description below more understandable. Go to www.RoHSReady.org/training.html to get the ACDC Example file. (shown in Class D). See RoHS Ready Training Module #207 for helpful guidance on this structuring.

You have existing declarations to import

If you have existing declarations in IPC 1752-2 v1.1, IPC 1752A or IEC62474 files these can be imported. Open the ACDC template and save it appending the part number to the file name. On the *Business Info* TAB there are several Rectangular Buttons. Click the *Import* button to launch the process of loading an existing file in the XML format. This is a great method to utilize the work that you completed earlier and now needs an update. Remember to complete the updates that are needed for the old format declaration. Check to make sure the data needed is all complete. Don't forget to save the file as you work on it, by the part number, and declaration class if needed.

Generating the Declaration to deliver to your Customer

You have several options for generating the declaration to deliver to your customer.

1. Send the excel ACDC temple with your information completed. This will get the data to your customer in a human readable format. Then your customer can Export the XML file and move it to their archive.

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2. Send the exported XML file. This gets the computer readable file to your customer in the smallest size file. Unless your customer has a tool like ACDC they will often not be able to read the contents of or edit your file.

Storing the completed forms for later use and update

As indicated earlier, in several sections, we recommend that you name the files with the part number and if you use several class declarations use that also. This allows you to find the declaration and either send it to another customer or made the needed updates without starting over.

You can store the files as the ACDC excel template or as the XML, since ACDC will import the XML when needed.

Other Labor Saving Methods

Fill in the Header than Save for later use

The section above “Quick Start Templates” is step one of the process. You save these templates. Then later when you need to complete a declaration go to the best match template and start at “You need to start work on a new declaration”.

Fill in the Level(*) before Substance Name(*) and CAS Number

On the *Substance* TAB, when you change the Level(*) from the pull down box, the data in Substance Name(*) and CAS Number are erased. Enter the Level(*) first to avoid rework. If this is not possible, there is a work-around. Before updating the Level(*) copy the data in the Substance Name (*)and CAS Number from your spreadsheet into Notepad then paste the data back into the cells after updating the Level(*) cell information. To copy the data to Notepad, select the data in the Substance Name(*)and CAS Number cells that you need to save, and Copy in Excel. Open Notepad and Paste the data into Notepad. Confirm that you have copied the needed data before starting the Level(*) cells effort. After the Level(*) cells update, go into Notepad and select all of the data there, Copy the selected data. Go into Excel and move your cell selected to the top cell in Substance Name(*), then Paste into the cells. Confirm that you have pasted all of the needed data into the correct cells and have not overwritten or missed any. Save your updated file.

Copy a part declaration to reuse the data for a similar part

If you have families of parts that are the same declaration, then you can format the file name as 123-456-xxx or 123-456-(100-300) so that you know with parts are included in this one declaration.

Some parts are used by your customer by the length, area, or volume can use the Unit(*) field on the *Product* TAB. Your customer would then indicate if they use 27 cm, 2.7 m2, or 0.0002 L for your product.