



REFERENCE GUIDE

Thank you for choosing ProductIP.

The information in this reference guide will enable you to instantly start with the process of creating, managing and sharing technical construction files for your products.

Besides explaining the basic functions it also gives insight in the more advanced functions such as reporting.

Don't forget to show the world your compliance efforts via the special sign that is available for registered users and the file available sign for those actually creating files in their own account (<https://www.productip.com/partners/>). Let your compliance efforts contribute to your success and help you to expand your business.

Prime, Pro, Pinnacle package. The ProductIP platform functionality is available in 3 different packages. Prime, Pro and Pinnacle. Check our website to learn about the latest overview and pricing

Any questions? Do contact us!

Regards, ProductIP

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>> Register is for first time users only. If you have registered yet, proceed with STEP 2 - LOGIN.

STEP 1 - REGISTER AS A USER

In order to be able to accept a tech file shared with you or to be able to start co-operating with a FAST request via an invite send to you by your customer it is required to register. Registration is FREE and doesn't require you to purchase anything.

You can even upgrade your account to a corporate account so you can add your colleagues. All of you then have access to the same information.

>> Go to www.productip.com and click on the button below

ProductIP

Search English

News A busy Hong Kong Electronics Fair [2014-04-18] Register Login

YOUR ROLE OUR SOLUTION PARTNERS EVENTS NEWS & MORE REGULATORY COMPANY

Create • Manage • Share

ProductIP
create · manage · share

Product Compliance
Companies placing products on the European market are required to comply with European, local and even company-specific laws and requirements. The number of regulations is constantly increasing, making it hard to know what applies to your products or not.

ProductIP has the solution: A [product compliance management platform](#) that provides the most comprehensive list of product specific requirements and the ability to demonstrate product compliance. ProductIP provides decision-makers with access to transparent information to make informed choices.

Properly organising the product compliance process saves you time, reduces costs and mitigates risks.

No additional IT investment required. Start today!

Compliance Tuesday

Every Tuesday is a Compliance Tuesday, you are welcome to visit us at one of our ProductIP offices. During keynotes, specific topics such as new directives or quality-related concepts will be explained. The ProductIP team is at your disposal to help you with all compliance and system-related matters.

BUY AND COMPLY

COMPLY AND SELL

Legal information | Contact us | Jobs | Terms of use | Privacy policy | Cookie policy

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Register Login

Login/Register; press login to login or register to create a new account. This will take you to the login page (<https://secure.productip.com>).

>> You will then be redirected to <http://secure.productip.com/verify>.

>> Enter your account information

Sex*	Sex; fill in your sex. Choose Male of Female
First Name*	First name; fill in your first name.

<i>Middle Name</i>	Middle name; fill in your middle name. For instance: de, van, van der, de van der, etc.
<i>Last Name*</i>	Last name; fill in your last name
<i>Email address*</i>	Email address; fill in your company email address. Your e-mail address is your user name. When you have been invited to co-operate for a FAST project or to accept a file shared with you then you must register with the same e-mail address as this invite or share has been send to otherwise we cannot match it!
<i>Password*</i>	Password; fill in your preferred password. You have to create and choose your own password. Please note: The password should contain at least 8 characters, including Capital letters, small letters and numbers.
<i>Confirm password*</i>	Password; for security reasons we ask you to re-enter your password.
	<i>*this is a mandatory field.</i>

>> Agree that ProductIP can send you e-mails related to their services by clicking the [checkbox](#)

>> Agree that you have read and accept the ProductIP [general conditions](#) by clicking the [checkbox](#)

>> Please verify that you are a 'real' user by filling in the CAPTCHA.

	CAPTCHA; for security reasons we ask you to enter the two words you see in the CAPTCHA: <i>*this is a mandatory field.</i>
---	--

>> Complete the registration

	Register; press the register button when you have filled in all the necessary fields.
---	--

>> After clicking the register button you will be presented the following message:

<p>Confirmation</p> <p>An e-mail has been sent to you with instructions for activating your account. You need to activate your account before you can continue to use ProductIP.</p>

The text in the email will look like this:

Dear ...,

Thank you for showing an interest in ProductIP
 Before you can start creating or viewing technical files we need to validate that this e-mail address indeed belongs to your account.
 To validate your account please click the link below.

<https://secure.productip.com/verify/activate?u=17506&key=d6470d5aa7a31f3b40aed8fb617b7f12>

If clicking the link doesn't work, try copying and pasting it in your browser.
 Please note that you have to complete this step within the next five days.
 After this period your account will expire.

Kind regards,
 ProductIP

>> Click on the hyperlink in that e-mail. A page should open with the following message:

Welcome

Thank you. Your account has successfully been validated. You can now start using ProductIP.

[Click here to continue](#)

>> Click continue and you will arrive at the login page. Login with your e-mail address and your password.

>> We will ask you to provide some more information to complete your registration. Of course this is required only one time.

Registration - More information

Before you can continue ProductIP needs some extra information, after completing this step you have full access to the expert system. (Note that you'll need credits in order to be able to create files)

Company: *

Job title:

General phone number: *

Mobile phone number:

Skype Address:

Address: *

Postal code: *

City: *

Province/State:

Country: *

>> Please fill in the (mandatory) fields.

<i>Company*</i>	Company; fill in the name of the company you work at
<i>Job Title</i>	Job Title; fill in your job title
<i>Phone Number*</i>	Phone number; fill in your phone number
<i>Mobile phone number</i>	Mobile phone number; fill in your phone number
<i>Skype address</i>	Skype; fill in your personal Skype name
<i>Address*</i>	Address; fill in your preferred password.
<i>Postal code*</i>	Postal Code; for security reasons we ask you to re-enter your password.
<i>City*</i>	City; fill in the City you work from
<i>Province/State</i>	Province/State; fill in your Province or State
<i>Country*</i>	Country; fill in your country
	<i>*this is a mandatory field.</i>

>> Complete the registration

	Register; press the register button when you have filled in all the necessary fields.
---	--

Thank you for registering at ProductIP

STEP 2 - LOGIN

>> Go to www.productip.com and click on the button below

<input type="button" value="Register"/> <input type="button" value="Login"/>	<p>Login; press login to login. This will take you to the login page (https://secure.productip.com).</p>
--	--

<h3>Welcome to ProductIP - Please login</h3>			
<p>Welcome to ProductIP, the internet based expert system for creating, managing and sharing CE Technical Compliance files.</p>			
<p>ProductIP is not a sourcing site. You can only see the technical files that you have created or that you have given access rights to from others. Users are identified via a combination of a user name, your e-mail address, and a password. If you are a new user we ask you to register first so we can verify you have access to the e-mail address you want to use for our system. Please contact us in case you need assistance: info@ProductIP.com.</p>			
E-mail Address:	<input type="text"/>	*	
Password:	<input type="password"/>	*	
	<input type="button" value="Login"/>		
New user?	Forgot your password?	User manual	Latest release information (2013-10-16)
<input type="button" value="Create new account"/>	<input type="button" value="Request a new password"/>	<input type="button" value="Download"/>	<input type="button" value="Download"/>

>> Fill in your account details

<p>E-mail Address: <input type="text"/></p> <p>Password: <input type="password"/></p> <input type="button" value="Login"/>	<p>Login; Use your e-mail address as username and the password that you have set by yourself.</p>
--	--

>> Further options at login:

<p>Latest release information</p> <input type="button" value="Download"/>	<p>Latest release information; We are continuously working on new functionalities. At the login page press <u>download</u> to get the information about the new features in our latest release. This will be useful in combination with this guide.</p>
<p>Forgot your password?</p> <input type="button" value="Request a new password"/>	<p>Lost Password; In case you have forgotten your password press <u>Request a new password</u>.</p> <p>You need to fill in your e-mail address and an email will be sent to you with a link so you can reset your password.</p> <p>Please note that for security reasons it is impossible to request another new password during the next 24 hours.</p>
<p>New user?</p> <input type="button" value="Create new account"/>	<p>New user; Please press <u>create new account</u>.</p>

<p>User manual</p> <p>Download</p>	<p>Download; Click this button to download the latest version of this manual.</p>
	<p>Language; please choose your preferred language. Current options are: English, Chinese, Dutch, German, French, Turkish, Spanish and Italian.</p> <p>Please contact us to request an additional language</p>

STEP 3 - EXPLORE USER INTERFACE AND SETUP

Welcome at your personal ProductIP dashboard.

Get an instant overview of the status of your files. See progress or lack of it in a glance and know where to act in order to get the information on time for your shipment. We use various icons to indicate the status of the files and actions running. You can start invites directly from here and of course open technical construction files and jump directly to the relevant section.

Type a search term in the Find field. No need to press enter. We start searching a few seconds after you stopped typing.

The screenshot shows the ProductIP dashboard. At the top, there's a header with the ProductIP logo, a navigation menu (Your Technical Files, Supplier files, Requests (1), Tasks, Invites), and a user profile section (Logged in as: onno@productip.com, Credits: 0, Packaging regulation & Scan your packaging by XRF, Log out, More news). Below the header, the 'Your technical files' section is visible. It includes a search bar, a table with columns for Status, Created, Deadline, Supplier name, and Product, and a legend for various file statuses.

>> These are the header possibilities:

The screenshot shows the ProductIP dashboard header. It includes the ProductIP logo, a navigation menu, and a user profile section (Logged in as: onno@productip.com, Credits: 0, Packaging regulation & Scan your packaging by XRF, Log out, More news).

	<p>Company logo; Every company can personalize their ProductIP experience with their corporate logo.</p>
	<p>Language; please choose your preferred language. Current options are: English, Chinese, Dutch, German, French, Turkish, Spanish and Italian.</p> <p>Please contact us to request an additional language</p>
<p>Logged in as: maarten@productip.com</p>	<p>User; we show which account you are logged in with.</p> <p>Administrating more than 1 account? Please move your mouse over the username and a drop down menu will appear with the other account options. Just click to change accounts.</p>

Credits: 9604 Allocated (FAST): 541 Available for use: 9063	<p>Credits; how many credits do I have? Do I need to order more credits? Just look at the credit line and you'll know.</p> <p>Allocated FAST is the number of credits that are reserved for pending FAST orders</p>
Greatest threats for C-level executives	<p>News headline; changing headline which shows the latest ProductIP news.</p>
Log out	<p>Log out; when you click the log out button you will be redirected to the ProductIP website.</p>
More news	<p>More news; interested in more news? Please click on more news and we'll present you with a list of useful news and information.</p>

>> This are the menu bar options

Your Technical Files	Supplier files	Requests (28)	Tasks	Invites			
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Your Technical files	<p>Your Technical files; this is what we call the landing page. When you log in this is the page you will be presented with.</p>
Supplier Files	<p>Supplier Files;</p>
Requests	<p>Requests; In case you have been invited to co-operate with your customer for uploading documents you will see a number between brackets behind the request button.</p>
Tasks	<p>Tasks; This page shows an overview of all tasks sorted per Technical File.</p>
Invites	<p>Invites; use this to receive an overview of the sent out invites.</p> <p>Use the show all, pending, accepted and declined buttons on top to create a select view.</p>

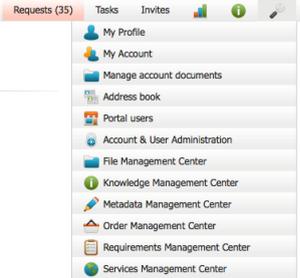
	<p>Reports; <i>When you have a lot of files you need to be able to have some structure. Files can be grouped in file groups. Users can be grouped in teams. Teams and users can have limited rights. Teams can have preset access to certain file groups for example. This you set via CONTROL PANEL and USER ACCOUNTS.</i></p> <p><i>It can be useful to be able to create an excel overview for that we have created the REPORTS function.</i></p> <p>Click and then press [RUN] under the item FILE LIST</p> <p>Use << or >> to move all available fields back to available or to selected. Use < or > to move the selected field to available or to selected. Set the different filter options and time frame and press [RUN]</p> <p>We will now create an excel sheet for you that you can download. It will be available for download under the header [REPORTS HISTORY]. This is the tool we use to create reports for our customers as well.</p>
	<p>Knowledge center; <i>Click and enter our knowledge center. You can use it to search our database for example search on a requirement number 60335-1 to see which products are linked to that requirement. Or search for a product and generate a basic requirement list.</i></p>
	<p>Control Panel; <i>this is the place to be for user or system settings. Further instructions regarding the control panel can me found under 'CONTROL PANEL'</i></p>

CONTROL PANEL AND SETUP

>> go to the CONTROL PANEL for your account

	<p>Control Panel; <i>you can find this in the top right corner of your screen.</i></p>
---	---

>> Click on 'My Profile'. This is the first option from the top.

	<p>Control Panel; <i>if you hover over the Control panel button you'll see a full list of options.</i></p> <p><i>The length of the list may vary depending on which services you purchased.</i></p>
---	--

>> You'll see three tabs called 'Profile', 'Email addresses' and 'Account settings'.

>> Click the 'Profile' tab to edit general information and contact information. Click 'edit' to edit the presented data.

My Account - Maarten van der Dussen

Profile | E-mail addresses | Account settings

General information [Edit](#)

Initials:
Sex: Male
First name: Maarten
Middle name: van der
Last name: Dussen

Contact information [Edit](#)

Company: ProductIP
Address
Galvanistraat 1
6716 AE EDE
Netherlands

Phone: +31318754145
Mobile phone: +31615903980
Skype: mvdussen

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>> Click the 'Email addresses' tab to add or delete an email address. Use the 'Add a new email address' button to add a new email address. Please note that there must be at least one email address! When using multiple email addresses please those set a primary address.

My Account - Maarten van der Dussen

Profile | E-mail addresses | Account settings

[Add a new email address](#)

Display records per page

Find

Email	Verified
maarten@productip.com	Yes

Showing 1 to 1 of 1 records

[Resend invite](#) [Set as primary email](#) [Delete](#) [First](#) [Previous](#) [1](#) [Next](#) [Last](#)

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>> Click the 'Account Settings' tab to set your subscription preferences and to reset your password.

My Account - Maarten van der Dussen

Profile | E-mail addresses | Account settings

Account settings

Alert subscription: Yes. Alert subscription end:
Document reminders: . Reminder period:

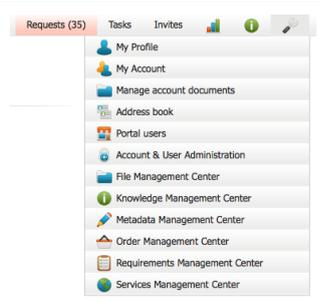
[Save changes](#)

Options

[Change password](#)

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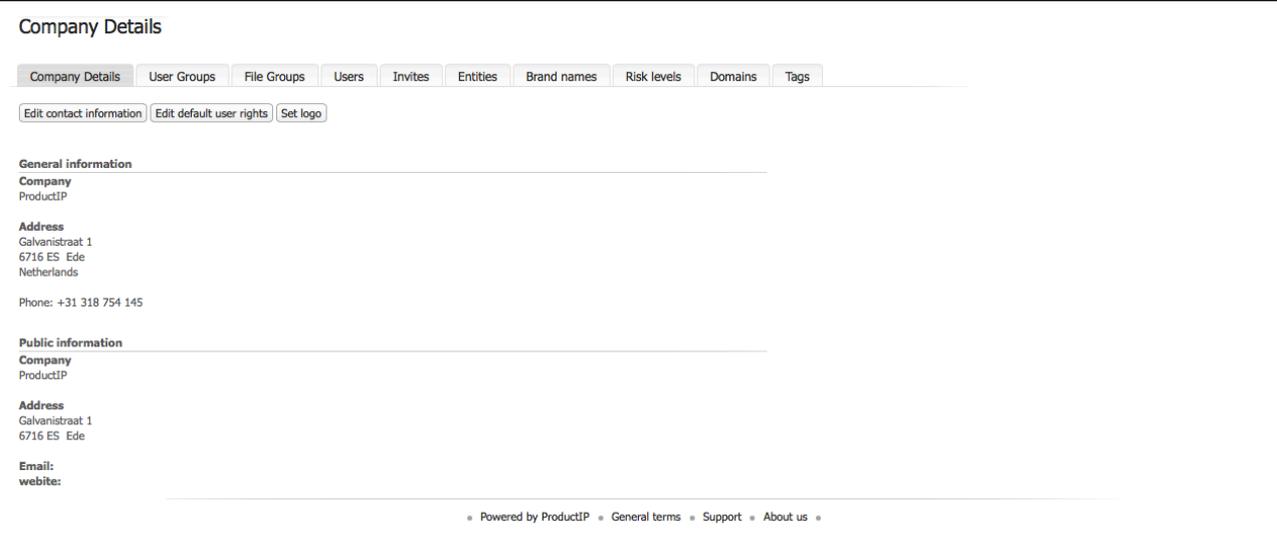
>> Click on 'My Account'. This is the second option from the top.



Control Panel; if you hover over the Control panel button you'll see a full list of options.

The length of the list may vary depending on which services you purchased.

>> You'll be presented with the page called **Company details**.



Company Details

Company Details | User Groups | File Groups | Users | Invites | Entities | Brand names | Risk levels | Domains | Tags

Edit contact information | Edit default user rights | Set logo

General information
Company
ProductIP

Address
Galvanistraat 1
6716 ES Ede
Netherlands

Phone: +31 318 754 145

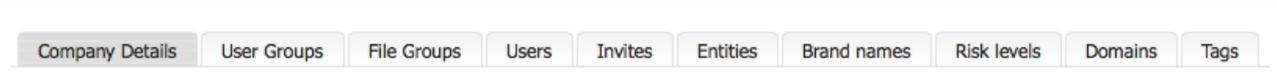
Public information
Company
ProductIP

Address
Galvanistraat 1
6716 ES Ede

Email:
website:

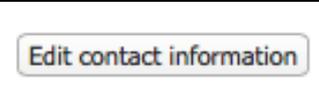
Powered by ProductIP | General terms | Support | About us

At the top you'll find the navigation that we'll use to setup all company information. We'll start with contact information and logo and stay on this page.



Company Details | User Groups | File Groups | Users | Invites | Entities | Brand names | Risk levels | Domains | Tags

>> Edit company information



Edit contact information; Please edit details if wrong, or add if incomplete using this button.

>> A screen opens in which you can fill in the correct information. Press save when you're done editing.

Edit contact information ✕

Contact information

Company: *

Phone: *

Address: *

Postal code: *

City: *

vatnumber:

Country: *

Public information

Copy from Contact information

Company:

Phone:

Address:

Postal code:

City:

Country:

Email:

Website:

>> Set company logo

<input type="button" value="Set logo"/>	<p>Set logo; Use this function to personalize your ProductIP experience by adding your company logo.</p>
---	---

>> A screen opens in which you can upload your company logo. Press save when you're done editing. Press delete if you want to delete the logo from the system.

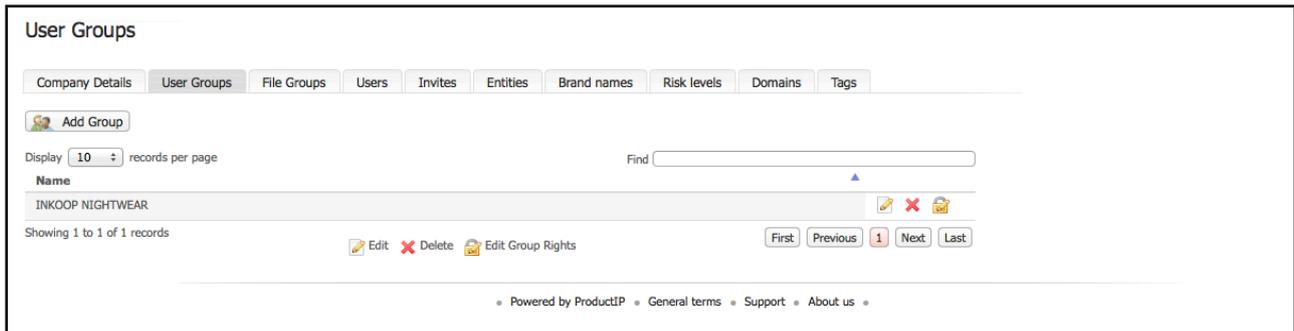
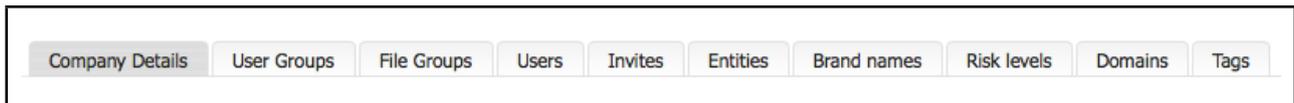
Set logo ✕

By uploading your company logo, you allow the logo to be used in the site header and all email messages that are sent out on your behalf by the system.

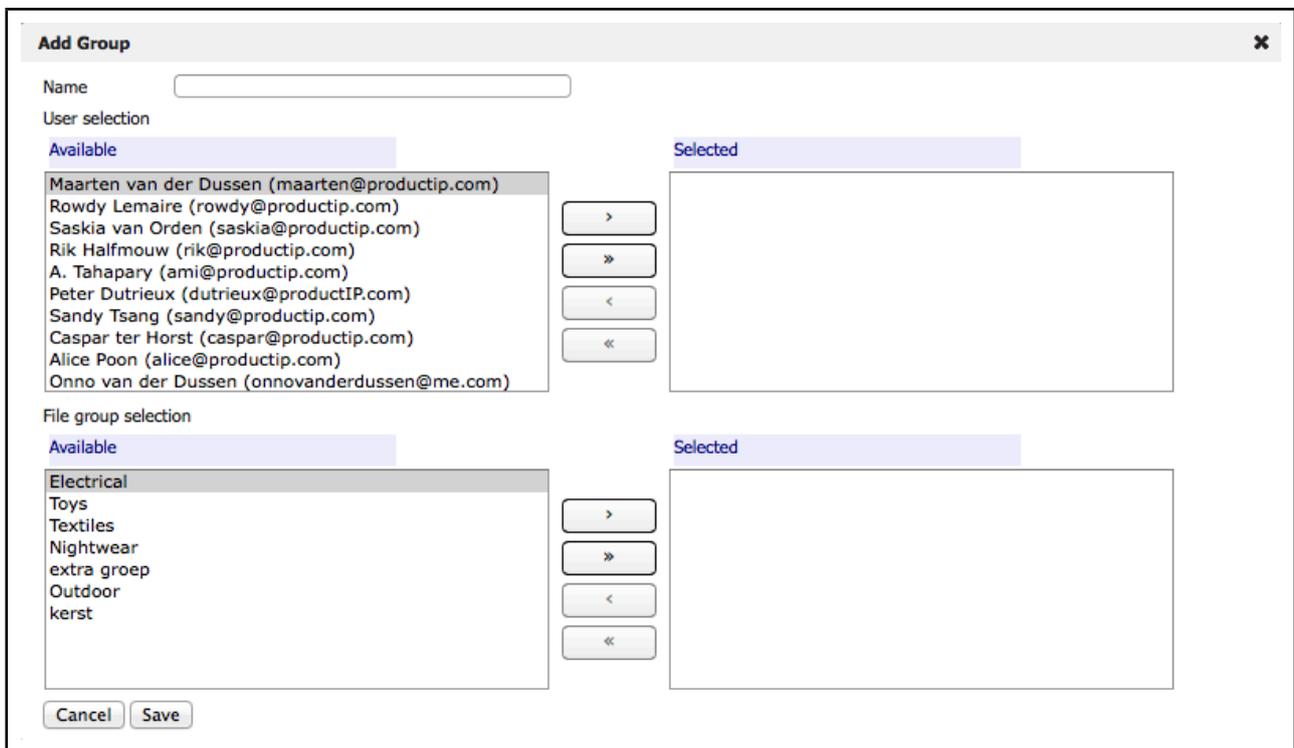
Logo: no file selected

USER GROUPS

>> Please click on 'User Groups'

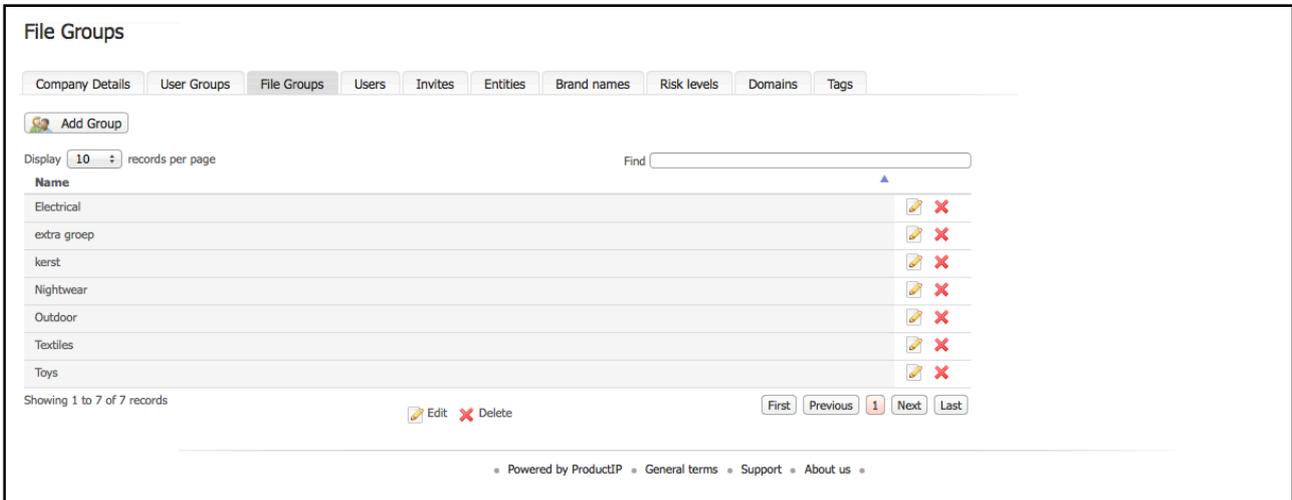


- >> Click on 'Add group' to add an user group.
- >> Use the arrows to add or delete someone from a group.
- >> Use the arrows to add or delete file groups to a group.
- >> Press save when you're done editing.



FILE GROUPS

>> Please click on 'File Groups'



>> Click on 'Add group' to add a file group.

>> Fill in the name of the group and click save



USERS

>> Please click on 'Users'



>> You'll be presented with the list of users that are connected to your company account.

User List - ProductIP

Company Details | User Groups | File Groups | **Users** | Invites | Entities | Brand names | Risk levels | Domains | Tags

View deleted users | Enable 2 step verification | Manage IP whitelist

Display 10 records per page Find

Name	Email	Phone	Skype	Login	
A. Tahapany	ami@productip.com	+31 318 700622	productip.ami	2014-02-21 14:45:59	  
Alice Poon	alice@productip.com	852 97710516		2014-02-18 18:12:34	  
Caspar ter Horst	caspar@productip.com	+31318754145		2014-02-20 15:30:36	  
Maarten van der Dussen	maarten@productip.com	+31 318 754 145	mvdussen	2014-02-24 12:10:34	  
Onno van der Dussen	onnovanderdussen@me.com	0123456789		2013-10-30 13:49:43	  
Peter Dutrieux	dutrieux@productip.com	0652554886	peter.dutrieux	2014-02-21 11:43:01	  
Rik Halfmouw	rik@productip.com	+31123456		2014-02-24 07:34:28	  
Rowdy Lemaire	rowdy@productip.com	+31318754145	rowdy.lemaire	2014-02-24 11:22:23	  
Sandra Lam	sandra@productip.com	53492149		2012-06-06 07:02:35	  
Sandy Tsang	sandy@productip.com	8675583211067	sandytsi	2014-02-21 07:07:34	  

Showing 1 to 10 of 13 records

 Edit Rights  User Groups  Delete  Select document types  Reset authenticator key

First Previous 1 2 Next Last

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Beside user information you find here two advanced security features. You can enable 2 step verification and manage IP whitelist. Both features enhance security.



Configuration; you can find these icons on the right of your screen. You can: edit rights, user groups, delete a user or select document types.

INVITES

>> Please click on 'Invites'

Company Details | User Groups | File Groups | Users | **Invites** | Entities | Brand names | Risk levels | Domains | Tags

Invite user(s)

Display 10 records per page Find

Name	Email	Invitation date	Status	groups	
nicole zheng	nicole@productip.com	2013-07-01	Pending		  
Onno van der Dussen	onno@productip.com	2014-02-24	Pending		  

Showing 1 to 2 of 2 records

 Resend invite  Select user groups  Manage user rights  Cancel  Delete  Select document types

First Previous 1 Next Last

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>> Click on the invite user(s) button



Invite user(s); use this button to invite your colleagues and add them to your company.

>> Fill in the contact information of the invitee. Press confirm invitation to sent the invitation

Invites ✕

Sex: *

E-mail Address: *

First name: *

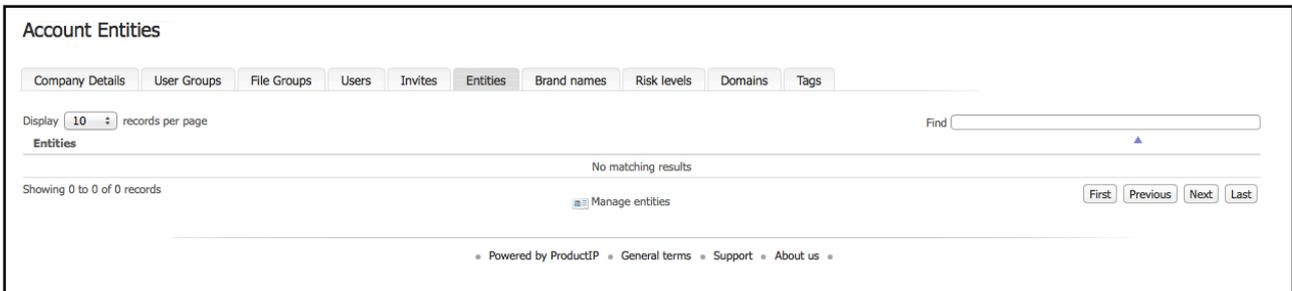
Middle name:

Last name: *

Message:

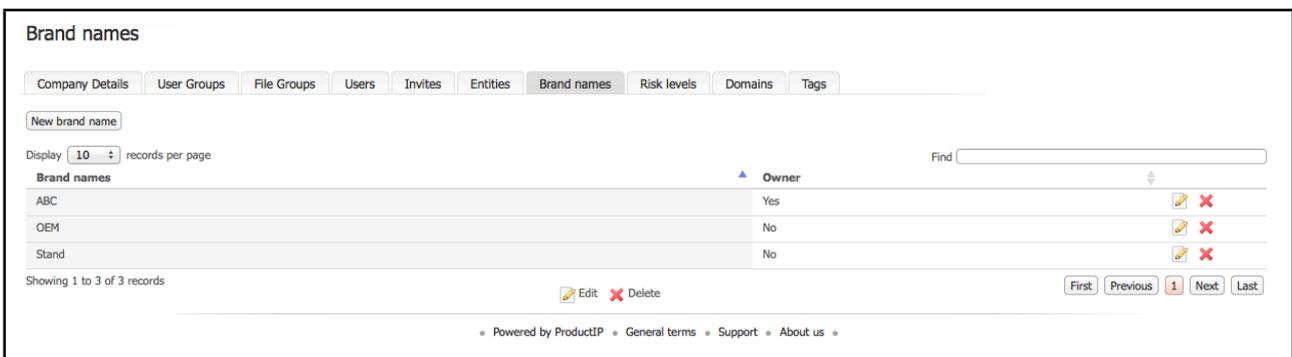
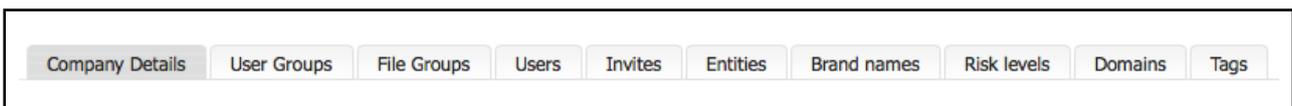
ENTITIES

>> Please click on 'Entities'

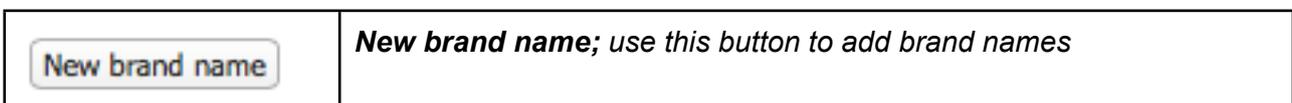


BRAND NAMES

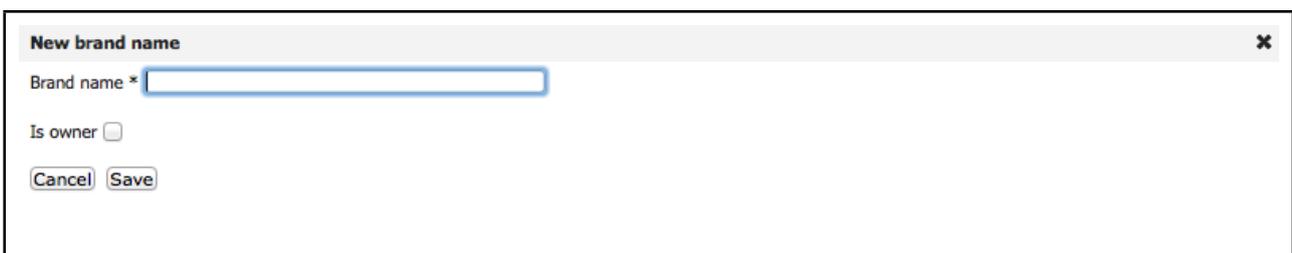
>> Please click on 'Brand names'



>> Click on the invite user(s) button

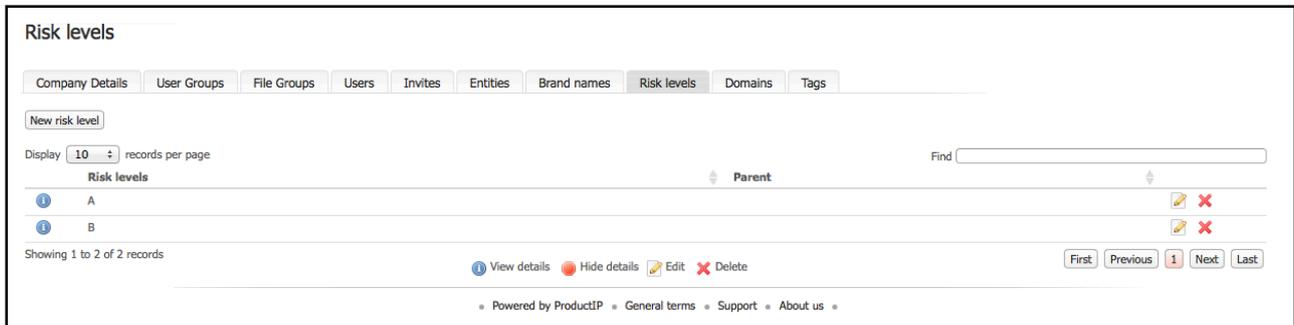
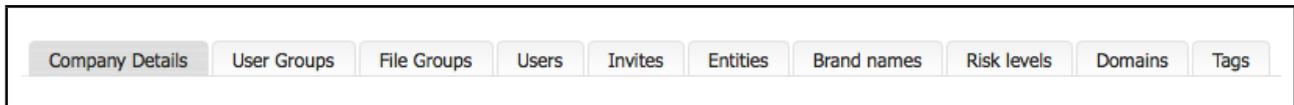


>> Fill in the brand name. Click the I'm am the owner of the brand name if you are the brand owner. Press save when you're done.

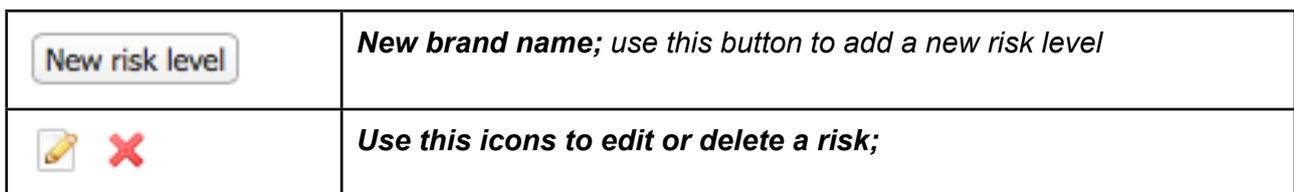


RISK LEVELS

>> Please click on 'Risk Levels'



>> Click on the New risk level button

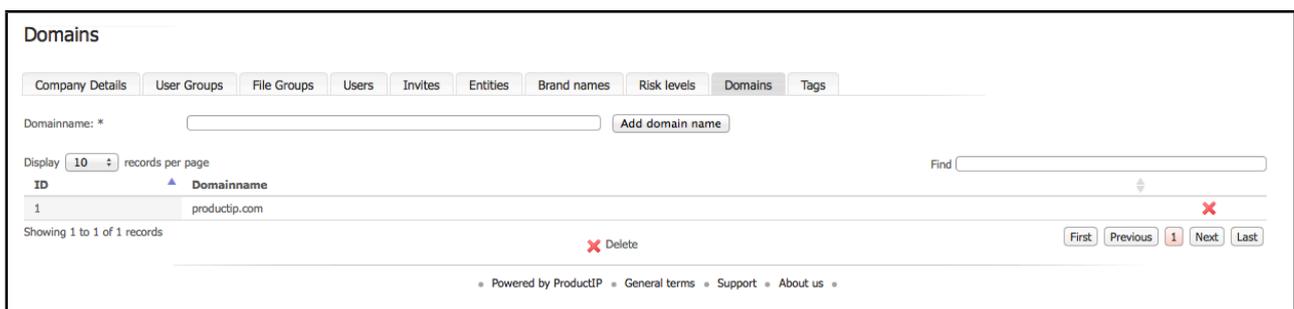


>> Fill in the Risk level code, description and parent. Press save when you're done.



DOMAINS

>> Please click on 'Domains'

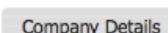


>> Add a domain by filling in the domain name and press 'Add domain name' to add the domain.

	Add domain name; use this button to add a new domain name
	Use this icons to delete a domain name;

TAGS

>> Please click on 'Tags'

									
---	---	---	---	---	---	--	---	---	---

<p>Tags</p> <p>Company Details User Groups File Groups Users Invites Entities Brand names Risk levels Domains Tags</p> <p>Tags: * <input type="text"/> <input type="button" value="Add tag"/></p> <p>Display <input type="text" value="10"/> records per page</p> <p>Find <input type="text"/></p> <table border="1"> <thead> <tr> <th>Tags</th> <th>Files</th> <th></th> </tr> </thead> <tbody> <tr><td>ABC</td><td>0</td><td></td></tr> <tr><td>Argos</td><td>0</td><td></td></tr> <tr><td>Battery Charger</td><td>1</td><td></td></tr> <tr><td>DI</td><td>1</td><td></td></tr> <tr><td>FAIL</td><td>1</td><td></td></tr> <tr><td>Homebase</td><td>1</td><td></td></tr> <tr><td>iris task</td><td>1</td><td></td></tr> <tr><td>PowerBank</td><td>1</td><td></td></tr> <tr><td>Sandy</td><td>0</td><td></td></tr> <tr><td>SL</td><td>0</td><td></td></tr> </tbody> </table> <p>Showing 1 to 10 of 15 records</p> <p><input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="1"/> <input type="button" value="2"/> <input type="button" value="Next"/> <input type="button" value="Last"/></p> <p>Powered by ProductIP • General terms • Support • About us</p>		Tags	Files		ABC	0		Argos	0		Battery Charger	1		DI	1		FAIL	1		Homebase	1		iris task	1		PowerBank	1		Sandy	0		SL	0	
Tags	Files																																	
ABC	0																																	
Argos	0																																	
Battery Charger	1																																	
DI	1																																	
FAIL	1																																	
Homebase	1																																	
iris task	1																																	
PowerBank	1																																	
Sandy	0																																	
SL	0																																	

>> Add a tag by filling in the domain name and press 'Add domain name' to add the domain.

	Add tag; use this button to add a new tag
	Use this icons to delete a Tag;

We'll return to 'Your Technical Files'

TABS

You can use tabs to organize your files and work more efficient.

>> Click on the '+' to create a new tab.

   	Tabs; with tabs you can make your workflow more efficient.
---	---

>> After creating a new tab you can choose the function of the tab by selecting or deselecting information.

>> Choose a smart name for the tab to make your work more efficient

OPTIONS REGARDING FILES

Status	Created	Deadline	Supplier name	Product	File type	End of life date	Market Release Date	Status
<input type="checkbox"/>	2012-10-09	2012-11-20		098223445 (Coffee Maker)	DIY		2013-03-01	draft

>> Click on the blue (i) to open a pull down menu that allows you the following actions for this technical file:

- Create a ZIP file and save it on your local disc holding all documents and all information in the file
- Create a CLONE for this file that you can use for a new shipment or for a file for a similar product

Status	Created	Deadline	Supplier name	Product	File type	End of life date	Market Release Date	Status
<input type="checkbox"/>	2012-10-09	2012-11-20		098223445 (Coffee Maker)	DIY		2013-03-01	draft

Export Make a clone

>> Click on the red circle to close this view.

You can also start and invite by clicking on the progress bar in the status column or by selecting multiple files and press [SEND INVITE FOR SELECTED FILES].

On mouse over the relevant row will change color. Click to open the technical file.

>> Click on DIY to upgrade the service level for this file to DIY+ or FAST



For FAST files you will see 3 phases indicated in the type column:

FAST (INV) - invite phase

FAST (COL) - collection phase

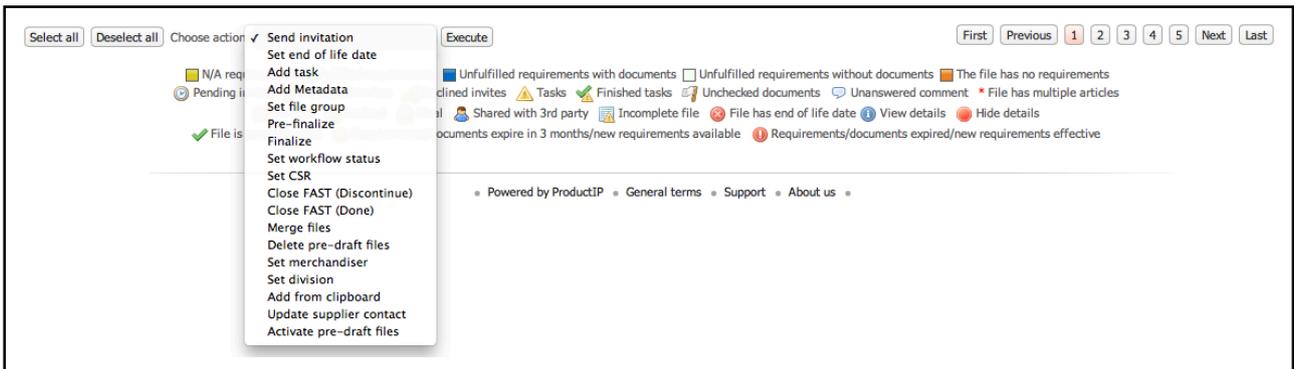
FAST (FIN) - final phase

MULTIPLE FUNCTIONS

>> After selecting the checkbox of one or multiple technical files you can execute a certain action.



>> Click on send invitation and a drop down menu will appear which shows a list of possible actions.



>> Click the preferred action en click execute to complete the action.

STEP 4 - INVITE COLLEAGUES / CORPORATE ACCOUNT

You can invite colleagues to join your corporate account in this way:

>> click and go to the CONTROL PANEL for your account

	Control Panel; you can find this in the top right corner of your screen.
---	---

>> click on [My Account](#)

	My Account; Manage your company contact information, users, groups and rights
---	--

>> click on [Invites](#)

	My Account; Manage your company contact information, users, groups and rights
--	--

>> click on [Invite user\(s\)](#)

	My Account; Manage your company contact information, users, groups and rights
---	--

>> Fill in this form and press confirm. Repeat for relevant colleagues

Sex*	Sex; fill in your sex.
Email Address*	Email address; fill in your colleague's company email address
First Name*	First name; fill in your first name.
Middle Name	Middle name; fill in your middle name
Last Name*	Last name; fill in your last name
Message	Message; you can add a personal message for your colleague.
	*this is a mandatory field.

>> To complete the invitation

<input type="button" value="Confirm Invitation"/>	Confirm Invitation; to confirm the invitation and sent an the invite to your colleague click <u>Confirm invitation</u>
<input type="button" value="Cancel"/>	Cancel; to cancel the invitation process click <u>Cancel</u>

Your colleagues will receive a request to register via e-mail. They need to follow the registration procedure and after completion they need to login. As final step they need to accept your invite to join the corporate account. This will be pending at the menu item REQUESTS.

CREATE A TECHNICAL FILE

>> Please note that you need credits to start creating a technical file. Please contact our ProductIP Sales Team to acquire credits. info@productip.com.

In the overview page you click on [create a technical file](#) and a wizard will start to guide you through this process. Of course you need credits in order to create files.

<input type="button" value="Create a new Technical File"/>	<p>Create a new technical file; with tabs you can make your workflow more efficient.</p>
--	---

INFORMATION

In this step we really only need the following information:

- your article number
- your article name
- what date do you plan (roughly) to put it on the market

The first two pieces of information will help you to find back the file. The date is important when selecting requirements that will be relevant by then for the product. All other information is for you to be able to trace back a file. Add more articles to the file in case this file need to cover a range of products. We suggest that you also add the article number of your supplier or in case you are a manufacturer that of your customer. It will help you to trace back the information.

>> Fill in the product information

New Technical File Wizard (1 / 7) ✕

Fields marked with * are obligatory.

Product information

Article number: *

Name: *

Market Release Date: *

Bar Code:

Purchase Order Number:

Shipment Number:

Brand name:

Customs code:

Customs code description:

File group:

Risk classification:

Description:

Workflow information

Supplier information

Customer information

>> Fill in the workflow information

New Technical File Wizard (1 / 7) ✕

Fields marked with * are obligatory.

Product information

Workflow information

Required completion date:  

Division:

Merchandise:

ProductIP CSR:

ProductIP order reference:

Supplier information

Customer information

Next >>

>> Fill in the supplier information

New Technical File Wizard (1 / 7) ✕

Fields marked with * are obligatory.

Product information

Workflow information

Supplier information

Here you may, voluntarily, add information about the supplier and his product. This information is not shared when you share the viewing rights of the file however it will help you to search and find technical files in the future.

Company Name: [New contact](#)

Contact email:

Contact code:

Sex:

First name:

Middle name:

Last name:

Direct phone number:

Supplier Code:

Address:

Postal code:

City:

General phone number:

Country:

Article number:

Product name:

Note:

Customer information

Next >>

>> Fill in the customer information

New Technical File Wizard (1 / 7) ✕

Fields marked with * are obligatory.

Product information

Workflow information

Supplier information

Customer information

Here you may, voluntarily, add information about the customer and his product reference who you will perhaps supply this product. This information is not shared when you share the viewing rights of the file however it will help you to search and find technical files in the future.

Company Name: [New contact](#)

Contact email:

Contact code:

Sex:

First name:

Middle name:

Last name:

Direct phone number:

Customer Code:

Address:

Postal code:

City:

General phone number:

Country:

Article number:

Product name:

Note:

REGIONS

Where do you plan to sell this item, what regions / markets. Select one or more or all. If this is the range that mostly applies then select [] set as default as well

>> Click the checkbox of the regions you plan to sell your product

New Technical File Wizard (2 / 7) ✕

Select a region

Which region(s) is your product being exported to?

Europe (Select all - Deselect all)

<input type="checkbox"/> Austria	<input checked="" type="checkbox"/> Belgium	<input type="checkbox"/> Bulgaria	<input type="checkbox"/> Croatia
<input type="checkbox"/> Cyprus	<input type="checkbox"/> Czech Republic	<input type="checkbox"/> Denmark	<input type="checkbox"/> Estonia
<input type="checkbox"/> Finland	<input type="checkbox"/> France	<input type="checkbox"/> Germany	<input type="checkbox"/> Greece
<input type="checkbox"/> Hungary	<input type="checkbox"/> Iceland	<input type="checkbox"/> Ireland	<input type="checkbox"/> Italy
<input type="checkbox"/> Latvia	<input type="checkbox"/> Liechtenstein	<input type="checkbox"/> Lithuania	<input type="checkbox"/> Luxembourg
<input type="checkbox"/> Malta	<input checked="" type="checkbox"/> Netherlands	<input type="checkbox"/> Norway	<input type="checkbox"/> Poland
<input type="checkbox"/> Portugal	<input type="checkbox"/> Romania	<input type="checkbox"/> Slovakia	<input type="checkbox"/> Slovenia
<input type="checkbox"/> Spain	<input type="checkbox"/> Sweden	<input type="checkbox"/> Switzerland	<input type="checkbox"/> Turkey
<input type="checkbox"/> United Kingdom			

Set as default

PRODUCT(S)

Type the main category of the product in the find field to search our database. Alternate type a standard number that you feel is relevant for this product, for example a particular part 2 of a standard. If you have no idea this moment type DEFAULT and select general merchandise. Perhaps after collecting more information from your supplier you get a more detailed idea about the requirements. The file is in DRAFT so you can still change the selected product, region and any other information.

You can also make combinations here. A fridge with a tv build-in? Search Fridge and press on  then search TV and press  for the relevant description. Now we will merge the requirement lists of these two into one file.

	Select product categories;
	Deselect product categories;
	Show product aliases;
	Hide product aliases;

Please select one or more product categories

New Technical File Wizard (3 / 7) ✕

Search and select your product
 In this step you have to search our database and select the actual type of product that you are going to make a file about. Is it a drill, a refrigerator, a luminaire? You can search on (part of) a product name but you can also search on a standard number (i.e. EN 60335-2-13) that you think could be relevant for the product. Type your query in the area behind 'FIND' and the system will start searching automatically when you stop typing.

Selected product categories:
None

Possible matches
 Display records per page Find

		Name
		13-pole connector 12 V
		7-pole connector type 12 N
		7-pole connector type 12 S
		AC Adapter - part of Audio, Video or similar electronic apparatus
		AC Adapter - part of Information Technology Equipment (ITE)
		AC Adapter - USB or similar output
		Accessories for ladders
		ACS - Switchgear - Controlgear - LV - Construction site
		Adhesives, glues
		ADSL splitter, passive

Showing 1 to 10 of 1,247 records

 Show product aliases
  Hide product aliases

Q&A

We look at legislation and recalls and try to figure out what questions have to be asked i.e. have not been asked. These are the questions mostly about certain aspects of products that help us to select additional requirements and add them to the database. Some of these questions must be answered (What is the age category for this toy?) others you are free to choose one or more (which materials are used for food contact?). Not all questions will cause a new requirement to be added. It might be that we expect that in the future this aspect might have its own rule and we then can warn you! In case of doubt skip the questions and consult your supplier and add the answer later. Remember the file is in draft still so all can be changed.

>> Click the checkboxes that apply to your product

New Technical File Wizard (4 / 7) ✕

Does the product have packaging ? (select at least one answer)
Answers are related to the Packaging and Package Waste Directive.

- NO, the product does NOT have any packaging
- YES, the product DOES have packaging
- YES; the product itself is considered packaging
- YES, AND the packaging should be considered to be a toy or child appealing
- YES, AND the packaging incorporates a large sheet / foil potential hazardous for children
- YES, AND Silica Gel is added to the packaging
- YES, AND the packaging is considered to be re-useable
- YES, AND the packaging is an aerosol dispenser i

>> Choose if you want to add inspection reports to the technical file

New Technical File Wizard (4 / 7) ✕

Do you want to add inspections to the technical file ?

- YES, inspection requirements and results should be added to the file.
- NO, inspections are not applicable for this product or batch.

>> If applicable, please select your customer for additional requirements.

New Technical File Wizard (4 / 7) ✕

Select customers

In this step you can select one or more CUSTOMERS to which you plan to supply the product. You will then later see if they require any special declaration for you to create and sign off as well.

- A.S. Watson Group
- ALDI
- DSGi
- HEMA
- Intraco Trading BV
- Sligro Food Group NL BV

NON MANDATORY REQUIREMENTS

There are some requirements that many of us feel are relevant and should be part of the technical construction file because that is the place where all this kind of information is stored. For example requirements related to social compliance. Select here those requirements that you wish to add.

>> Please select the non mandatory requirements which you want to add to the technical file

If you want to upgrade the service level of a file to DIY+ or FAST select the required service level you wish to upgrade to. It requires additional credits to upgrade to DIY+ or FAST.

>> Choose if you wish to create the file yourself or ask ProductIP to do it for you.

>> To complete the creation please click [Create the Technical File](#)

<input type="button" value="Create the Technical File!"/>	<i>Create the Technical file;</i>
---	--

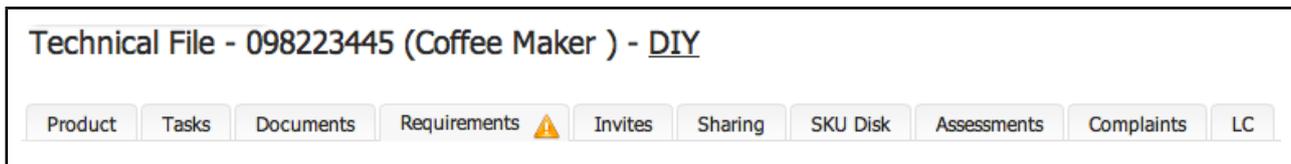
NEXT STEPS

We suggest that you go to SENT INVITATIONS and send your supplier an invite so he can start helping you to complete this file.

REQUIREMENTS

Your customer can offer you two different rights via an invite. The basic right is to upload documents. The additional right is that you will also be allowed to make a match between the documents and the requirements. In case you own a file yourself you have the right to do this of course.

>> if you go to a technical file and open the requirements tab you see different icons.



The page show all the requirements that are applicable regarding the questions you answered when creating the file.

>> Information icons:

	Unfulfilled; At the start the status of all the requirements is unfulfilled
	Not Applicable; declare this requirement Not Applicable (N/A). The aspect / issue / requirement mentioned is relevant for this kind of product however in this particular case the requirement has no impact. It is better to declare it Not Applicable then to delete it from the requirement list. Now you can show that you have considered it.
	After this the status icon at the left side will change Not Applicable
	link documents. Click this and you can select documents uploaded already that proof compliance for these aspects.
	This will change the status icon at the left side to IN PROGRESS
	Knowledge Centre; click on this icon to go to our knowledge centre and learn if there is more information available on this requirement. A link to purchase the standard document at the BSi online store. Information related to this standard and it's connection to other standards and products. Guides or templates that can be used to learn more or sign off on this requirement. (available info may vary) Most sought after templates are those for RISK ASSESSMENT or SAFETY ASSESSMENT (Toys) for REACH and REACH/SVHC
	Return; Click on this to set the status back to unfulfilled
	Info; this will show which documents have been linked to the requirement
	Not applicable;

There can be a lot of requirements. In order to make your work easier we have added a functionality to quickly set the view only to a specific group of requirements. Select the related group via this drop down menu.

>> Use it in combination with these one click filter options:

Select requirement group: <input type="text" value="Select Some Options"/>	Select requirement group; to cancel the invitation process click <u>Cancel</u>
Select requirement category: <input type="text" value="Select Some Options"/>	Select requirement category
<input type="button" value="Show all"/>	Show all, show all the requirements
<input type="button" value="Unfulfilled"/>	Unfulfilled; only show the unfulfilled requirements
<input type="button" value="In progress"/>	In progress; only show the requirements that are in progress

>> Actions

<input type="button" value="Pre-finalize"/>	<p>Pre-finalize; When all requirements are either made Not Applicable or have the FULFILLED status you will see that the option PRE-FINALIZE has become available.</p> <p>Via PRE-FINALIZE and then FINALIZE the file will get the status FINAL. These are two separate steps as in some organizations these are responsibilities for different user(groups) and this system allows review stages.</p> <p>Note that a FINAL file cannot be amended. It can be used to create another draft file via CLONE. This draft does have all the documents and requirements and it can then be edited, updated to another market entry date, new regions etc. The CLONE structure is commonly used to create a systematic approach of a file per shipment. Most production is done in batches and therefor QC and Inspection related documents are relevant to show proof of compliance.*</p> <p>We will keep a “mother-daughter” relation between these files in our database.</p> <p>* alternate is to use our Vendor Assessment module. This will require an additional subscription.</p> <p><i>Please note: Only for the owner of the file can finalize the file. So not the invited party!</i></p>
<input type="button" value="Check for update"/>	Check for update;
<input type="button" value="Add Requirement"/>	Add requirement; manually add requirements.
<input type="button" value="Edit regions"/>	Edit regions; add or remove prospect markets.
<input type="button" value="Edit categories"/>	Edit categories; edit the product category by choosing another from the list.

Report incorrect requirements	Report incorrect requirements; our experts are constantly updating the system. If you nevertheless find an error please let us know!
Print checklist	Print Checklist; It can be convenient to have an overview of the status of the file. Use to generate a PDF with detailed information. This may be helpful when communicating with your supplier for example to help your buyer to prepare for a meeting.
CE Declaration	CE Declaration; auto generate a CE declaration by filling in your name and position.
Add task	Add task; further action needed by one of your colleagues? Create a task.

FULFILL REQUIREMENTS

In the requirements tab set the filter to IN PROGRESS.

Select all and press DECLARE FULFILLED at the bottom of the screen and confirm. Of course you can also FULFILL requirements one by one.

In the status overview of all technical files the progress bar will change from white to blue to green for that % of the requirements IN PROGRESS (blue) and FULFILLED (green)

SENT INVITATIONS

>> Press the **Your Technical Files** button

Your Technical Files	<i>Your Technical files; this is what we call the landing page. When you log in this is the page you will be presented with.</i>
-----------------------------	---

>> Select the checkbox of the file you want to create a invite for

Status	Created	Deadline	Supplier name	Product	File type	End of life date	Market Release Date	Status
<input checked="" type="checkbox"/>	2012-10-09	2012-11-20		098223445 (Coffee Maker)	DIY		2013-03-01	draft

>> Scroll down

Select all Deselect all Choose action: **Send invitation** Execute

First Previous 1 2 3 4 5 Next Last

>> Click on send invitation and a drop down menu will appear which shows a list of possible actions.

Select all Deselect all Choose action: **Send invitation** Execute

- Send invitation
- Set end of life date
- Add task
- Add Metadata
- Set file group
- Pre-finalize
- Finalize
- Set workflow status
- Set CSR
- Close FAST (Discontinue)
- Close FAST (Done)
- Merge files
- Delete pre-draft files
- Set merchandiser
- Set division
- Add from clipboard
- Update supplier contact
- Activate pre-draft files

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>> Choose Send Invitation. Click execute to complete the action. The following screen will appear.

Please choose [X]

Selected files: 1

Send an invite for the following files ?
(You can only send invites for files with status Draft)

- Coffee Maker (098223445)

Yes No

>> Press **Yes** to continue.

>> When you pressed Yes you will be asked to fill in the contact information of the invitee.

Send an invitation ✕

Get help creating your technical file.
 You can send an invitation to everyone who you think could help you in creating your technical file. You can give these users very specific rights, to make sure they can only see and do as much as they need to.

Current storage:
MB **89898989 (demo lautsprecher)**

Attachment 1 no file selected

Attachment 2 no file selected

Attachment 3 no file selected

E-mail Address: *

Company:

Company code:

First name: *

Middle name:

Last name:

Sex: *

Subject:

Message:

Create a task for:

Upload

Upload and fulfill

Required completion date:  

Send me a CC of the invitation

Include supplier product name and article number

>> It is possible to add documents to the invite. Press Choose File to start uploading.

>> Fill in the invitee details

>> Feel free to edit the message and or subject of the invite

>> Select whether the invitee can Upload or also Fulfill a file

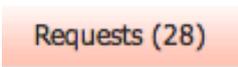
>> Create a **deadline** with selecting a completion date

>> Select if you want to: include the reference guide, send me a CC of the invitation and/or Include supplier product name and article number

>> Press **Confirm Invitation** to sent the invite

ACCEPT A REQUEST

In case you have been invited to co-operate with your customer for uploading documents you will see a number between brackets behind the request button.

	<p>Requests; you find this button in the top menu bar. Click it to show requests.</p> <p>Please note the number behind the button, this shows that you have outstanding requests.</p>
---	--

>> Click on the REQUEST button and if the product is indeed supplied by you click on the checkmark icon (green with circle) in order to accept the invite.

	<p>Accept; Use your e-mail address as username and the password that you have set by yourself.</p>
	<p>Decline;</p> <p>What if you are not the one able to handle this request? You basically have following options.</p> <p>Decline the invite by clicking on this icon. Your customer will also noted that you have declined the invite. It might be worth sending your customer an e-mail indicating that the e-mail is better send to an alternate department within your organization.</p>
	<p>Comments;</p>
	<p>Show details;</p>
	<p>Hide details;</p>
	<p>Downloads;</p>

>> You now have accepted the invite and the status is also changed at your customers end.

>> Create a corporate account and invite the relevant colleague(s) yourself so that you as a team can offer best service to your customer.

PROCEED WITH REQUESTS / TASK / MESSAGE

At REQUEST you click on the underlined product name of the invite.

Requests

On this page you can view your incoming requests. Before accepting or declining a request you can view the technical file by clicking on its name. After accepting the request you can make changes you were asked to do in the technical file.
 Note: After declining or completing the request you will lose all rights on the technical file instantly.

Open requests

Display records per page

Invitation date	From	Name	Tasks
2011-12-05	Maarten van der Dussen (ProductIP)	<u>Bideend (123456789)</u>	Upload
2012-02-09	keith lam (Win Win)	<u>Defini -copy (112345_rpd)</u>	Upload
2012-02-16	Metro Team @ ProductIP (Metro Cash & Carry International GmbH)	<u>Professional Care Excelsior (123456)</u>	Upload
2012-02-16	Metro Team @ ProductIP (Metro Cash & Carry International GmbH)	Electric Toothbrush (3050)	View request
2012-02-28	Alice Poon (ProductIP)	qqqqqqqq - On Hold - (qqq)	View request
2012-02-28	Alice Poon (ProductIP)	qqqqqqqq - On Hold - (qqq)	View request
2012-03-24	CSA Team @ ProductIP (CSA)	Yogi Bear (12345)	View request
2012-04-29	ProductIP Team @ HEMA (HEMA BV)	Koekenpan 24 cm (323456)	View request
2012-09-21	Michael Nijenhuis (ProductIP-michael)	Combi magnetron (Abud)	View request
2012-10-23	Maarten van der Dussen (ProductIP)	Beer (6769697879878)	View request

Showing 1 to 10 of 18 records First Previous 1 2 Next Last

Open requests pending for review

Display records per page

Invitation date	From	Name	Tasks
2011-11-09	Ahold Team @ ProductIP (Ahold Europe)	<u>Pluto Pluche (ah12345)</u>	Upload

Showing 1 to 1 of 1 records First Previous 1 Next Last

Shared files

Display records per page

From	Name	Tasks
Maarten van der Dussen (ProductIP)	Toy train (12007bbb)	View share
Maarten van der Dussen (ProductIP)	pot (v0372)	View share
Maarten van der Dussen (ProductIP)	Milkfrother (max.150 ml,Plastic body, power base, handle and lid) -copy (LM145P)	View share
Maarten van der Dussen (ProductIP)	Waterkoker (123456)	View share
Maarten van der Dussen (ProductIP)	Toy train (12007bbb)	View share
Maarten van der Dussen (ProductIP)	Milkfrother (max.150 ml,Plastic body, power base, handle and lid) (LM145P)	View share

Showing 1 to 6 of 6 records First Previous 1 Next Last

LC

Display records per page

Article number	Name	Supplier article number	Supplier article name	Company	Shipment Number	Tasks
345678	Speelgoedbeer	345678	Toy Bear	ProductIP	tretre	
ABCD1234	Sandy Test	1234ABCD	Iron Radio	ProductIP	12345	
LM145P	Milkfrother (max.150 ml,Plastic body, power base, handle and lid)	LM145P	Milkfrother	ProductIP	1234	

Showing 1 to 3 of 3 records First Previous 1 Next Last

Accept
 Decline
 Comments
 View details
 Hide details
 Downloads

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>> The REQUIREMENTS tab offers you a list of relevant requirements. The goal is to sign off these requirement by uploading evidence and match it with the requirements.

Technical File - 123456789 (Badeend) - FAST(FIN)

Product Tasks (1) Documents Requirements Invites Sharing SKU Disk Assessments Complaints LC

Pre-finalize Check for update Add Requirement Edit regions Edit categories Report incorrect requirements Print checklist CE Declaration Add task

Show all Unfulfilled In progress Fulfilled

Select requirement group:

Select requirement category:

Display records per page Find

Requirements	Category	Expiry Date	Regions
<input type="checkbox"/> General Information (6/11)			
<input type="checkbox"/> Custom Declaration (0)	B3		
<input type="checkbox"/> Additional information (optional) (0)	B3		
<input type="checkbox"/> Bill of Material (BOM) and/or Bill of Substances (BOS) (1)	B3		
<input type="checkbox"/> Corrective Actions - Documentation (1)	B3		
<input type="checkbox"/> Critical Component List (CCL) / Constructional Data Form (CDF) (0)	B3		
<input type="checkbox"/> Declaration of Product Identity (0)	B1, B3		
<input type="checkbox"/> License, Patent, Trademark *see More info for our disclaimer (0)	E		
<input type="checkbox"/> Manual / Instruction (1)	B3		
<input type="checkbox"/> Packaging (Picture of) (1)	B3		
<input type="checkbox"/> Product (Pictures of) (1)	B3		
<input type="checkbox"/> Production Code (1)	B3		
<input type="checkbox"/> EC Declaration of conformity (DOC) - overview directives: (0/1)			
<input type="checkbox"/> EC Declaration of conformity (DOC) (0)	B1		
<input type="checkbox"/> Dangerous Imitations Directive (0/1)			
<input type="checkbox"/> Council Directive (87/357/EEC) Dangerous imitations directive (0)	B1		
<input type="checkbox"/> Social Accountability (0/1)			
<input type="checkbox"/> BSCI Audit Report (0)	D		
<input type="checkbox"/> REACH Regulation (0/2)			
<input type="checkbox"/> ED777/2011 - REACH SVHC candidate list per December 19, 2011 (0)	B1	2012-12-18	
<input type="checkbox"/> EC No. 1907/2006 - REACH - declaration - Annex XVII substances (0)	B1	2012-06-04	
<input type="checkbox"/> Hazardous Substances not covered by REACH (0/1)			
<input type="checkbox"/> 2009/251/EC DMF ban (0)	B1	2012-06-04	
<input type="checkbox"/> Toy Safety Directive (TSD) (0/18)			
<input type="checkbox"/> CEN/TR 15071:2005 (0)	B1		
<input type="checkbox"/> CEN/TR 15371:2009 (0)	A	2013-02-13	

>> Click on DOCUMENTS and upload documents from your local system via ADD DOCUMENTS. We accept PDF and JPG formats. In case you want to use documents at multiple files upload them to one file first then use the ADD TO and COPY FROM CLIPBOARD function to add them to other files.

Technical File - 123456789 (Badeend) - FAST(FIN)

Product Tasks (1) Documents Requirements Invites Sharing SKU Disk Assessments Complaints LC

Upload documents Paste from clipboard Account documents Add task Set document permissions

Display records per page Find

Name	Reference Number	Document Type	Expiry Date	Size	Uploaded by	Linked	Upload date
<input type="checkbox"/> Corrigerende maatregel.pdf				0.30MB	Maarten van der Dussen	Yes	2011-12-05
<input type="checkbox"/> EMC report.pdf				0.23MB	Alice Poon	No	2012-04-24

Showing 1 to 2 of 2 records

	<p>TODO; In you have any action to be done or any comments to offer for example a test report is pending but expected by such and so date we suggest you add it as a TODO. Simply type in this information so it's clear what is the pending status to others looking at this file.</p>
--	--

	<p>MESSAGE; <i>In case you want to leave a message for your customer or our customer services representative (CSR) working on this file use this services which you find under REQUEST</i></p> <p><i>The advantage of adding this kind of information via TODO and MESSAGE is that they become part of the log of this file.</i></p>
	<p>COMPLETED; <i>In case you have completed uploading all your documents and information available then press the completed icon in the related row in the request page.</i></p> <p><i>When you have pressed this button the status of the invite is completed and after that you no longer have access to the file. In case you need to upload more documents your customer has to re-invite you again first!</i></p>

FAQ: I (still) have to upload files but it seems I cannot?

ANSWER: The status of the invite should be "accepted". If the status is "pending" then accept the invite first. If the status is "completed" or "declined" then your customer has to re-invite you first. Contact them or us via e-mail asking for this!

DOCUMENTS

You can match requirements with documents but you can also approach it from the other way namely matching documents with requirements.

ProductIP will monitor final files for you and inform you if for that technical construction file new requirements have become relevant. We can also inform you if documents in those files become invalid. Documents may become invalid at a certain date because:

- the issuer has set an end date
- you know that your customer(s) only accept documents not older then x years
- it's your own policy to renew certain documents after x years

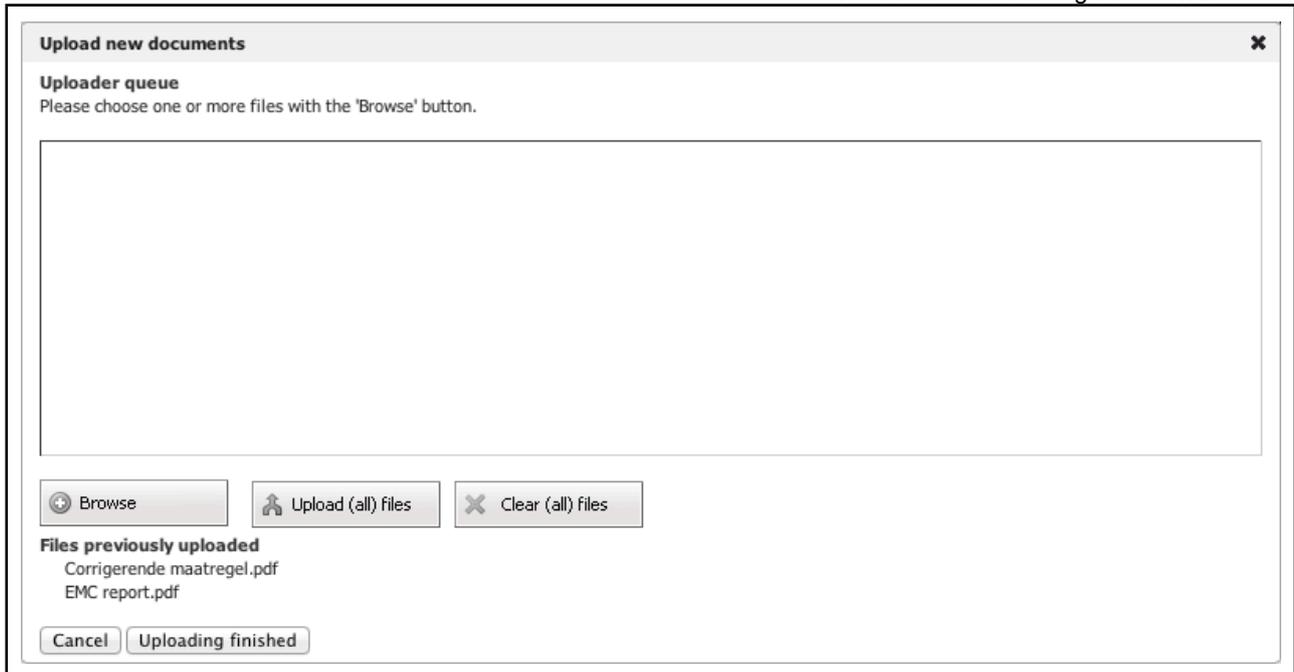
HOW TO UPLOAD

At the documents tab you can upload the documents.

>> Click on the ADD DOCUMENTS button.

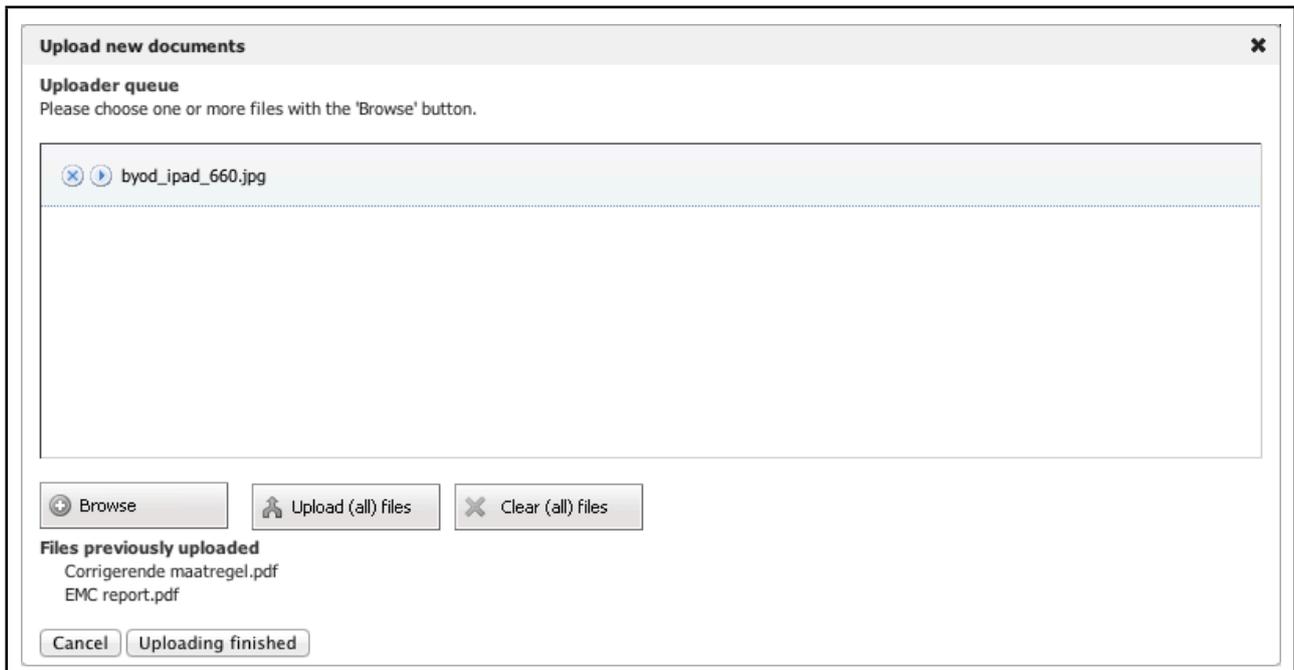
	Upload document; use this button to upload new documents
	Paste from clipboard; You upload documents into one file. With copy to clipboard you can use a document also in another file. You can find the instructions below. See 'clipboard'.
	Account document; you can have documents linked to your account. Use this button to add them to a file. See <u>Control panel</u> > <u>Manage account documents</u> to overview or upload a account document.
	Tasks; you can create tasks for a yourself or a colleague. Click the <u>Add task</u> button en write down <u>the task</u> , choose a <u>type</u> , <u>assign</u> it, mark a completion <u>date</u> and give a short <u>description</u> .
	Set document permissions; with this functionality you can make a attached file public through the public page of your product.

This will open the following window



>> Click on BROWSE to open a window where you can select files from your local disc / network.

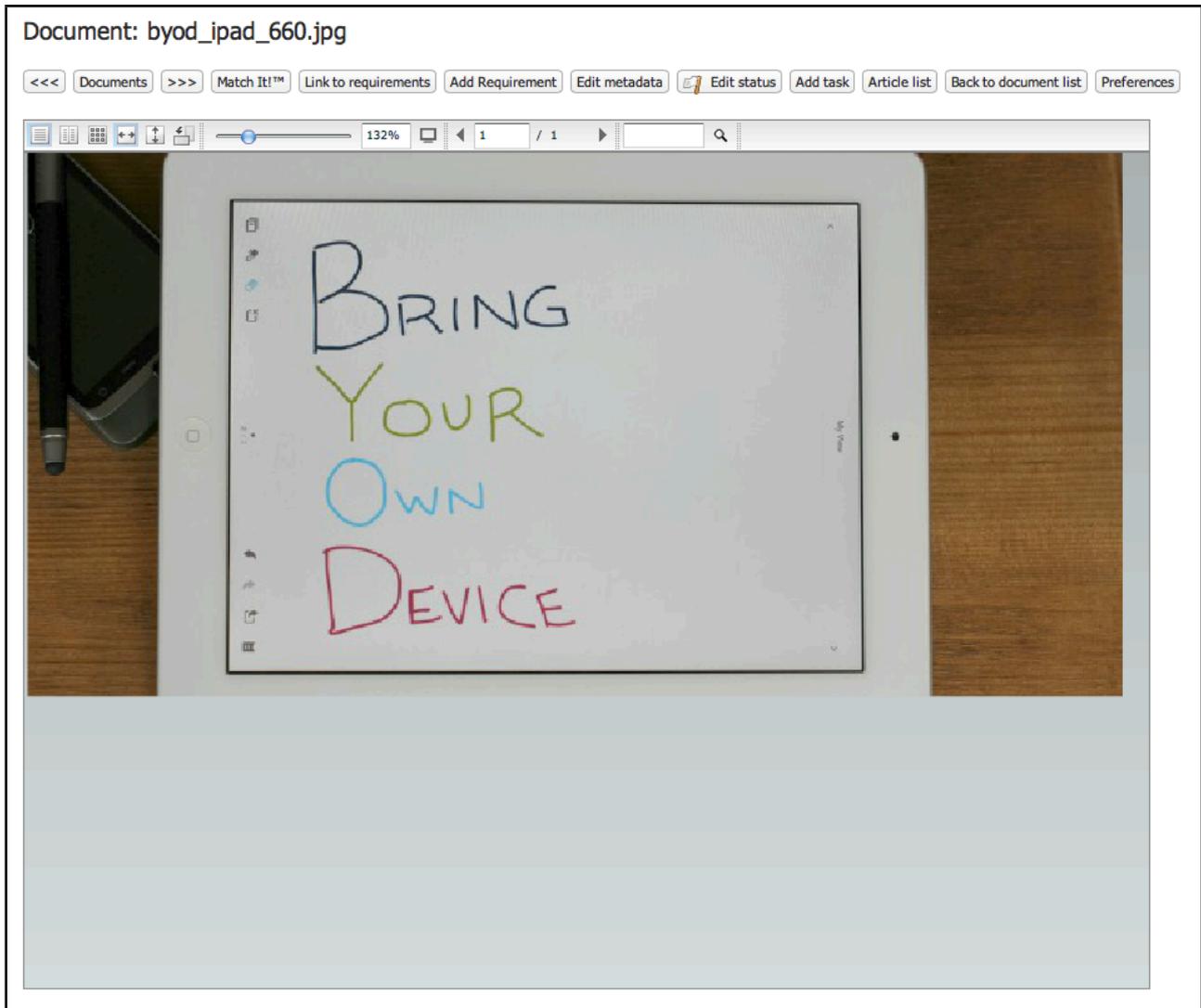
>> Select on or more documents and press enter. You will see that the documents will show in the Uploader Queue window see in below example the logo-black_on_white.jpg file.



>> Repeat the Browse your local disc / network and select more files if required. If you are finished press Upload (all) files.

>> ProductIP will upload multiple files in parallel. Press Uploading finished once all uploading is finished and you are done.

View Document



CLIPBOARD

You upload documents into one file. What if you want to use a document also in another file?

Display 25 records per page Show all

<input type="checkbox"/>	Name	Reference Number	Document Type	Expiry Date	Size	Uploaded by	Linked	Upload date	
<input type="checkbox"/>	Corrigerende maatregel.pdf				0.30MB	Maarten van der Dussen	Yes	2011-12-05	
<input type="checkbox"/>	EMC report.pdf				0.23MB	Alice Poon	No	2012-04-24	
<input type="checkbox"/>	byod_ipad_660.jpg				0.03MB	Maarten van der Dussen	No	2013-08-26	

Showing 1 to 3 of 3 records

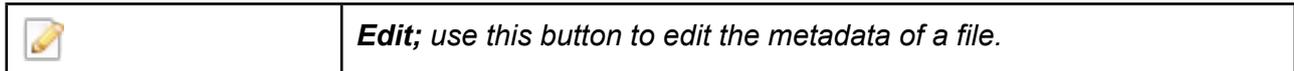
Select the document or documents and press **ADD TO CLIPBOARD** and confirm with **YES**. Now open the technical file where you also need this document and select **COPY FROM CLIPBOARD**. Select the relevant documents and select **Copy to File**.

DETAILED INFORMATION

On the Documents page you can find a lot of information. You can see who has uploaded the document, the review status and if the document has been used to sign of on a requirement already or not yet. All this is progress information!

In order to be able to search and find documents and offer warnings when they become invalid additional data has to be added, so called metadata. Click on the underlined document name and a separate window will open. The document will show in a web based viewer.

>> Click on the edit icon



This will open the following window

Edit ✕

Enter details for document **Corrigerende maatregel.pdf**

Name: .pdf

Description:

Reference Number:

Issued By: ▾

Issue Date:  

Issued To:

Document Type: ▾

Expiry Date:  

Remind date:  

Remind note:

- Give the document a good name that indicate what kind of document it is.
- When required add information at the description field.
- Reference number would be the official reference number of that document or certificate. It may be your internal number when it's your own document.
- It was issued by WHO, WHEN and TO who (most likely to yourself).
- Select what kind of document it is or select OTHER.
- If any expiry date select it here.
- Alternate you may select a remind date separately or even additionally. The text entered in Remind note will be shown to you on the set remind date.



You can link this document to one or more requirements and you can directly set the status of the requirement to FULFILLED. In one go!

MATCH IT

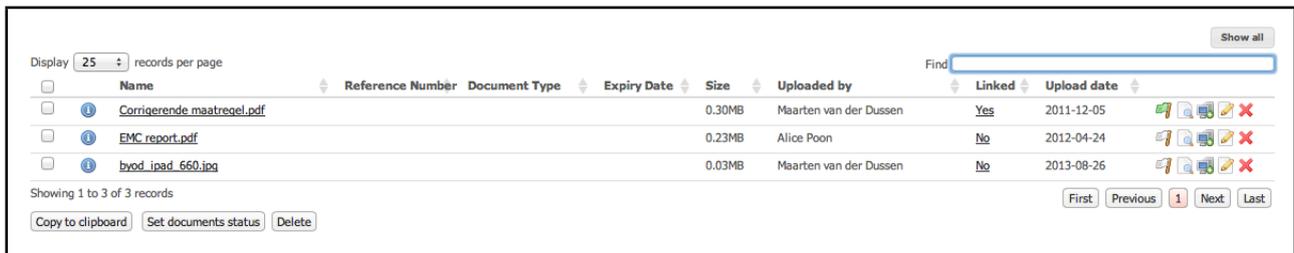
Match it! is a very helpful, fast working tool that will save you a lot of time. Match It! checks the PDF documents in your technical file and looks for the article numbers and applicable requirements. It enables you to link the found requirements in each document directly to the requirements in one go.

>> Go to a technical file that has documents that are not yet linked to requirements.

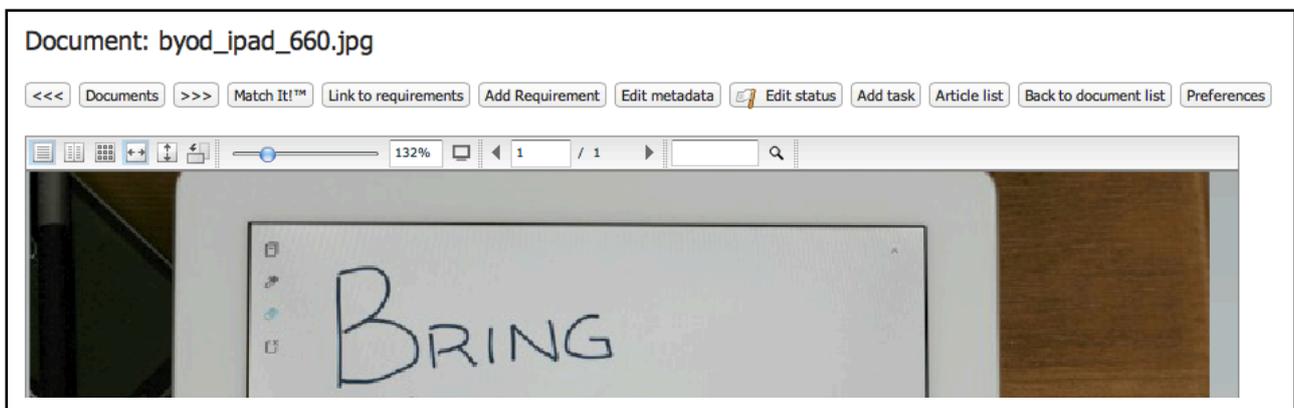
>> Click on Documents



>> Click on the document name to open the document (PDF)



>> Click on Match It!



Match starts immediately and a moment later you get the following window:

Match document to requirements ✕

Checking: Done.

Article number:

Found	Not found
	Art_toy #406

Requirement results:

<u>Requirements</u>	<u>Match</u>
Toys Directive	
<input checked="" type="checkbox"/> EN 71-1:2011	EN71-1 : 2011
<input checked="" type="checkbox"/> EN 71-2:2011	EN71-2 : 2011
	EN71-2:2011
<input checked="" type="checkbox"/> EN 71-3:1994	EN71-3 : 1994

You can click on any of the matched requirements, it is then highlighted in the PDF document so you can quickly verify its relevance. Then, with a single click on [Link to documents](#) you immediately link the found requirements to the viewed document.

Add documents to requirements manually

>> Click on 'Your technical files' choose the product you want to work with. Select the requirements tab. You'll be presented with a list of requirements that need to be fulfilled.

Technical File - 098223445 (Coffee Maker) - (ProductIP)

Product | Timeline | Tasks | Documents | **Requirements** ⚠ | Invites | Sharing | Reviews | SKU Disk | Assessments | Complaints | LC | i

Select requirement status:

Select requirement group:

Select requirement category:

Display records per page Find

Requirements	Category	Expiry Date	Regions
<input type="checkbox"/> Product Information (0/10)			
<input type="checkbox"/> <input type="checkbox"/> Additional information (optional) (0)	C		
<input type="checkbox"/> <input type="checkbox"/> Product construction - Bill of Materials, Substances (BOM, BOS) of the product (1)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Product construction - Drawings, Exploded Views, Constructional Data (CDF) (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Product construction - Printed Circuit Board (PCB) (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Product construction - Safety Critical Components List (CCL) (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Product identification - Declaration of Product Identity (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Product identification - Pictures, artwork (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> Traceability - Production Batch code (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> User information - Manuals and Instructions (0)	B3	2012	
<input type="checkbox"/> <input type="checkbox"/> User information - Markings, Ratings, Warnings, Pictograms (0)	B1	2012	
<input type="checkbox"/> Social Compliance (CSR) (1/4)			
<input type="checkbox"/> <input type="checkbox"/> Business Social Compliance Initiative (BSCI) (0)	D		
<input type="checkbox"/> <input type="checkbox"/> Environmental compliance declaration (0)	D		
<input type="checkbox"/> <input type="checkbox"/> International Labor Organization (ILO) declaration (1)	D		

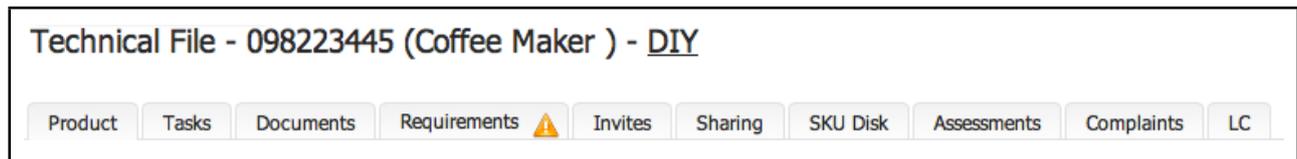
>> Notice the three small icons on the right.

	<p>Declare not applicable; use this button to declare a requirement not applicable to a certain product. Please note it seems like an easy way to complete a file the fast way but it will just be an empty shell!</p>																								
	<p>Link to documents; use this button to link a document to the requirement.</p> <p>Click the checkbox of the document you want to link and press save.</p> <div data-bbox="504 595 1423 801" style="border: 1px solid #ccc; padding: 5px;"> <p>Link documents to [Additional information (optional)] ✕</p> <p style="text-align: right;">Find <input type="text"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name</th> <th style="text-align: left;">Document Type</th> <th style="text-align: left;">Issued By</th> <th style="text-align: left;">Issue Date</th> <th style="text-align: left;">Expiry Date</th> <th style="text-align: left;">Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> BOM list.pdf</td> <td></td> <td></td> <td></td> <td></td> <td>unchecked</td> </tr> <tr> <td><input type="checkbox"/> 450-12 - EN71 - 24-11-2011-2.pdf</td> <td></td> <td></td> <td></td> <td></td> <td>unchecked</td> </tr> <tr> <td><input type="checkbox"/> Coffee Maker HES120GS TEST REPORT-1.pdf</td> <td></td> <td></td> <td></td> <td></td> <td>checked</td> </tr> </tbody> </table> <p>Showing 1 to 3 of 3 records</p> <p style="text-align: right;"><input type="button" value="Cancel"/> <input type="button" value="Save"/></p> </div>	Name	Document Type	Issued By	Issue Date	Expiry Date	Status	<input type="checkbox"/> BOM list.pdf					unchecked	<input type="checkbox"/> 450-12 - EN71 - 24-11-2011-2.pdf					unchecked	<input type="checkbox"/> Coffee Maker HES120GS TEST REPORT-1.pdf					checked
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<input type="checkbox"/> Coffee Maker HES120GS TEST REPORT-1.pdf					checked																				
	<p>More info; use this button to read more information about the requirement.</p> <p>Example:</p> <p>Requirement</p> <p>Name Product construction - Bill of Materials, Substances (BOM, BOS) of the product</p> <p>Description The Bill of Material gives an overview of the parts required to produce the product. The minimum that should be highlighted here are those parts relevant for compliance with the requirements. Those could be parts relevant for LVD, EMC, but also plastics relevant for mechanical strength and so on. It shall be not easy to dismiss parts from the list as being not relevant. The Bill of Substances is relevant for the chemical assessment of the product e.g. for REACH or Cosmetics, etc.</p> <p>Product categories AC Adapter - for Toys Packaging - Wooden pellets, crates</p>																								

SKU DISK

Part of PRO and PINNACLE package

SKU disk allows you to add generic documents to files, no matter draft or final, that are not related to requirements. This is a handy feature for those who want to use ProductIP to keep track of all documents related to orders / shipments. For example shipping documents, gas-free certificates of containers and so on.

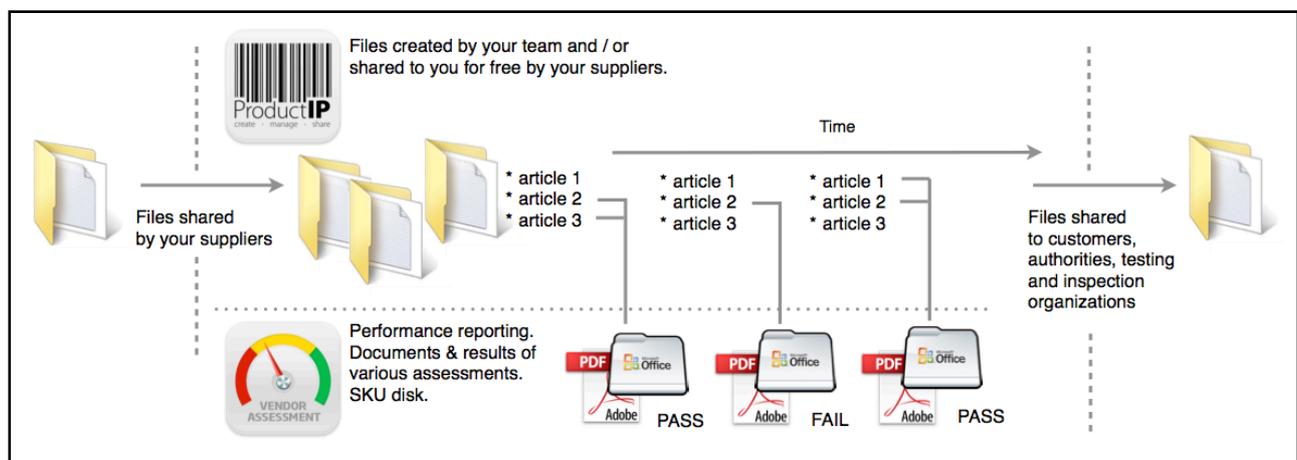


SKU disk allows you to add generic documents to files, no matter draft or final files, that are not specific for requirements.

- Types allowed are PDF, images and office documents.
- Define your own assessment types. For example; Sample Evaluation, Factory Audit, Pre-Shipment Inspection, Incoming Goods Inspection)
- Choose result type Pass / Fail, x from y points or AQL
- Get status reports on performance of suppliers, buying teams, product categories over time.

Create a relation between one or more articles in a file and documents, because a shipment may include just a part of the range covered by a technical file. and many more features.

In Technical Construction Files you mostly likely store Pass result documents only. In the Vendor Assessment you will store both Pass and Fail result documents.



>> See 'DOCUMENTS' for further instructions involving uploading.

VENDOR ASSESSMENT MODULE

Vendor Assessment module is part of the Pinnacle package or as an add-on to the Prime package. (It's not an add on to the Pro package because in that case you are better of choosing the Pinnacle package).

Where technical files typically only hold documents (evidence) that have a positive (PASS) result towards the requirements, the Vendor Assessment module allows you to keep track of the performance of your supply chain on various aspects. You register the assessment result and the score. The PASS and the FAILS.

We offer default different types of assessments with on of the following different kind of score types:

- Pass / Fail
- Pass / Fail based on achieved result (points or %)
- Pass / Fail based on achieved results AQL

The Vendor Assessment module helps you to keep track of various KPI's regarding your supplier performance. What KPI's depend also on the type of assessments that you develop and apply yourself. This could be first sample evaluations, pre-shipment audits, incoming goods checking at your distribution centre and so on.

COMPLAINTS

>> Click the Complaints tab at the menu bar



>> Click add complaint to start



>> Fill in the fields and press save to save and return to the complaints overview page.

Add complaint [X]

Name(*)

Type(*)

Description

Solution

Complainant name

E-mail Address

General phone number

Address

Postal code

City

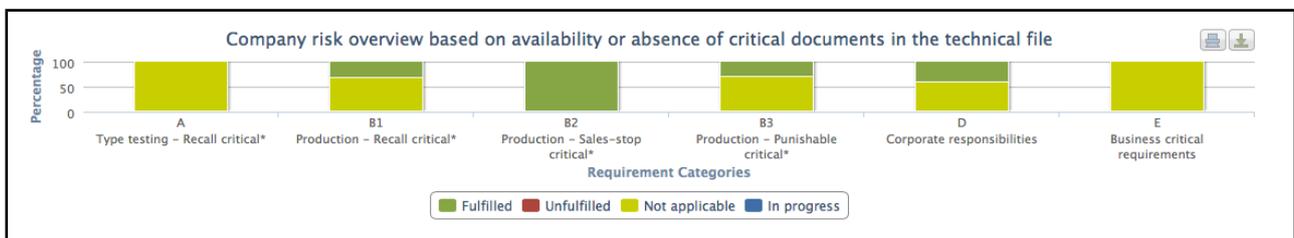
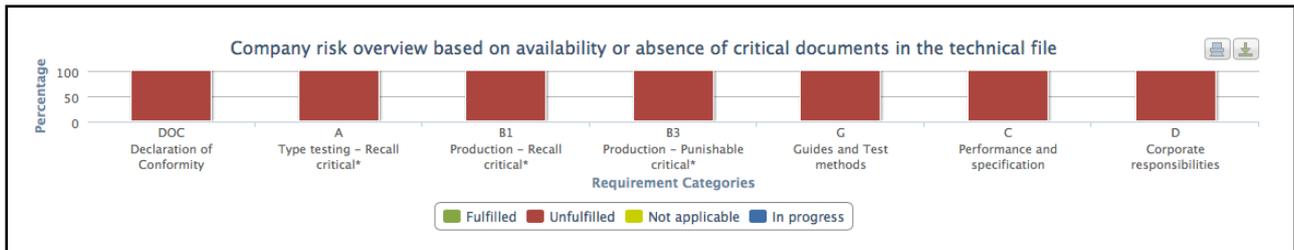
Country

Cancel Save

LC

Letter of Credit (LC) Functionality (Part of Pinnacle Package)

The LC functionality in ProductIP enables you take out references to requirements as conditions in LC's and replace them with a condition called ProductIP LC letter. Any changes in the relevancy of certain requirements during the ordering process now won't require you to amend the LC, add extra cost and ordeal, you just update the requirement list in ProductIP. Once you are satisfied with the provided evidence of compliance you release the ProductIP LC letter to the manufacturer. Who can release what and at what stage of the technical file can be set as user rights in the control panel of your corporate account.



Above you can see two charts with obviously different sets of risks.

>> Press the **Add LC authorization** button

<input type="button" value="Add LC authorization"/>	<p>Add LC authorization; press this button to create and release an LC declaration.</p>
---	--

>> Fill in the necessary fields

Add LC authorization ✕

Shipment Number: *

Recipient email: *

Recipient company:

Recipient firstname:

Recipient middlename:

Recipient lastname:

PRIVATE SHARING

You can share files with e.g. government organizations or customers. These need to become user first. This registration is automatically inducted in the Sharing process.

>> Click in the Add Share button

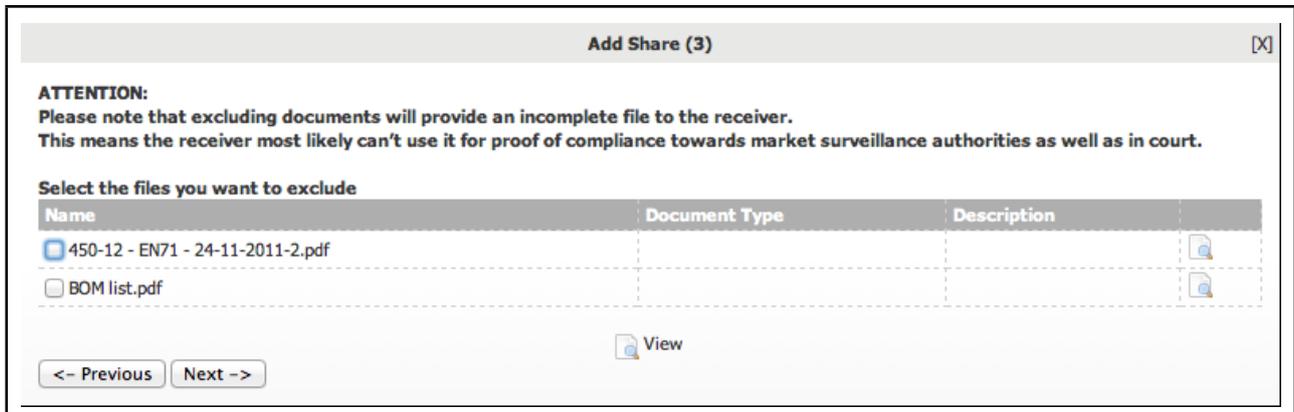
>> Define a name for the share

>> Fill in the necessary fields.

>> Necessary field are: **personal information** of the invitee (click add to add the user), a decision whether to let the invitee only **view or also clone** the file and an **end date** of the share.

>> Click the next button

>> It is possible to exclude documents from the share. Click the checkbox if you want to exclude one or multiple documents.



Add Share (3) [X]

ATTENTION:
Please note that excluding documents will provide an incomplete file to the receiver.
This means the receiver most likely can't use it for proof of compliance towards market surveillance authorities as well as in court.

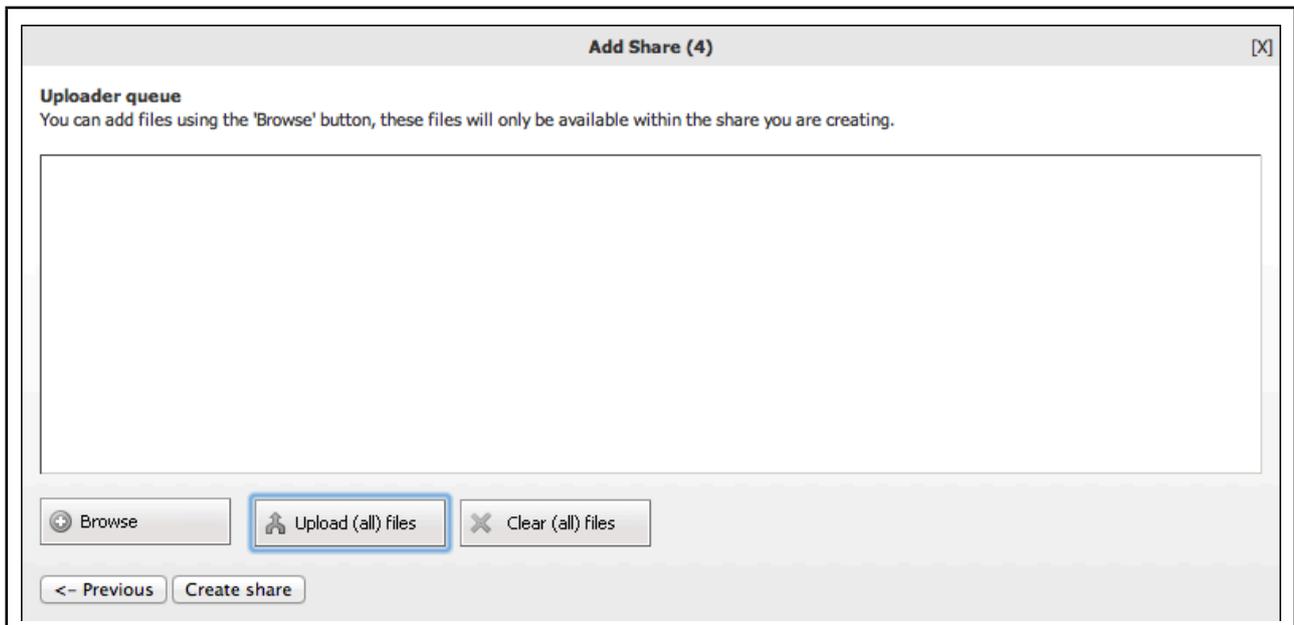
Select the files you want to exclude

Name	Document Type	Description
<input checked="" type="checkbox"/> 450-12 - EN71 - 24-11-2011-2.pdf		
<input type="checkbox"/> BOM list.pdf		

View

<- Previous Next ->

>> In case you want to upload some extra documents to the share you can do this in step 4.



Add Share (4) [X]

Uploader queue
You can add files using the 'Browse' button, these files will only be available within the share you are creating.

<- Previous Create share

>> Press create share to complete the share. The invitee will receive an email with the invitation to open the file.

PUBLIC SHARING

ProductIP is secure system and **not** a sourcing system so how why or how can a file be public?

Part of the information in a technical file could be relevant for the consumer. For example an overview of Substances of Very High Concern (REACH/SVHC) is to be offered within 45 days to any consumer asking for this information. Perhaps you also wish to share a manual, a spare part list, some information on your social compliance.

Select those documents that you want to make available. Select [] enable public page for this file and press SAVE. Now share the hyperlink via website or printed copy or otherwise and you have offered access to those documents. The other information available is very limited and not confidential. You will notice we also offer you the artwork for a QR code. There are many free applications available, also for mobile devices, that allow consumers to scan this code and this will cause a web browser to open on the relevant public page.

With the PUBLIC function build in right into your technical file we have made sharing very easy.

Even with the PUBLIC function switched off you still are able to share information about the fact that you are using ProductIP e.g. that a file is available via one of these signs. Use them on your website, quotations, specifications, packaging, manuals, warranty cards. Key is that there is a valid file!



For more information on terms and conditions for using this and other ProductIP related signs please contact us. You can find the signs on our website (<http://www.productip.com/users/>).

PRODUCTIP FAQ

Frequently Asked Questions

Q What does ProductIP mean? Anything to do with Intellectual Property?

A ProductIP means: Product Information Platform. ProductIP is for the creation, management and sharing of product technical (CE) files that are compulsory in the European market. Nothing to do with Intellectual Property. The IP also refers to the IP addresses of the internet as we are web based services

Q Are you hosting in the Cloud?

A No we host on our own dedicated server in Hong Kong which is monitored by Rackspace

Q You are a web based service. Can I retrieve information to our own server?

A Yes you can. Complete files including all information and documents can be downloaded to your own disk / server as a zip file

Q I noticed you offer DIY, DIY+ and FAST services. When do I make a choice?

A You make a choice per each project. It's up to you. For the content please refer to our Description of Services

Q What happens with my files if something happens to ProductIP?

A Then you have two years to finish your files and download them as ZIP files to your own server

Q Is it a sourcing system?

A No, it is a closed system. You decide whom you grant access to certain files either to co-operate with you when making files (via INVITE) or to show information in a file to a customer or authorities (via SHARE). Within the account settings you can decide who within your corporate account can have what rights. With respect to our cooperation we like to refer to our confidentiality declaration.

Q What is the scope of ProductIP?

A For this moment Non-Food consumer products supplied to the EU / EFTA countries. We expect to expand to other regions in the future.

Q What does TCF mean?

A TCF stands for Technical Construction File. The purpose of the TCF is to be able to proof that products supplied to the market comply with relevant legislation. It is a mix of technical information, approvals, QC documents and inspection documents.

Q Is a TCF the same as CE?

A For consumer products (non-food) one or more Directives can be relevant for your product. The General Product Safety Directive (GPSD) is always applicable and that directive requires a TCF. Other directives such as Low Voltage, EMC, Toys, Machine and more may require additionally a CE declaration of conformity (DoC) to be available.

Q Why a risk assessment? I have a test report from a famous laboratory already!

A Great that you have that report but that is test on a few samples only. Some risks can be introduced by variations in production, by packaging, by a manual or even point of sale. A risk assessment shows how the supply chain is dealing with that either via QC, warnings, production identical to the approved model, pre-shipment inspection, batch coding etc. You see that a TCF has a wider scope as type testing. Sure your test reports are part of the TCF and they do have great value!

Q Does FAST services leads to a complete file?

A Not necessarily. We are a supporting secretariat, not a testing laboratory, not an inspection authority, nor the actual producer of an item. See our Description of Services. It's the producer that has to have the evidence and supply it to you

Q I'm a retailer / importer not a manufacturer so why should I have technical construction files?

A In case you are selling products under your own brand and / or importing products then you are the one to be able to offer proof that products comply with requirements. You will be regarded as manufacturer (and or importer) even you are not the actual producer of the goods.

Q Why you are using a credit system?

A Files need to be kept available for 10 years. With the conversion of credit to one file the cost of 10 years hosting and data traffic as well as monitoring the status of the file compared to the legislation for those 10 years is taken into account. For additional modules such as Vendor Assessment, Complaints, Substances, REACH we will use a subscription model as these are additional services relevant for specific companies only. One file can be 50 Mb in size. You can add more Mb in steps of 50 via conversion of credits but this is seldom required.

Q So one product is one technical construction file is one credit?

A Not necessarily. In many cases a technical file will cover a range of products that have just small deviations in design or features.

Q You have DIY, DIY+ and FAST services, what are they?

A DIY means Do It Yourself. You are operating the system and we offer support to you using our platform. DIY+ is as DIY but we offer additional support to your supplier by explaining him more about the regulation, what is required, where he possible can arrange test results. The actual work in the file is still done by yourself. FAST is short for File Assembly Support Team and in that mode we are acting as secretariat on your behalf. Following up with the supplier. Gathering the available required information. Doing a paper review to see if this is indeed related, relevant, authentic. Adding metadata etc. To go for DIY, DIY+ or FAST is up to you on a case by case basis. Refer to our description of services for an overview.

Q Who are your current customers?

A We have a wide range of international customers ranging from manufacturers, brand-owners, importers and retailers. Check www.productip.com to get the latest overview. We'll be more than happy to add you to the reference list as well. You will also find us on LinkedIn as there is a ProductIP group and you can follow us via twitter [@productip](https://twitter.com/productip) as well.

Q Can you do inspections or other services?

A No but we do our best to make agreements with relevant parties so they can offer discounts to ProductIP users. Discounts on rates for inspection services or for example AON who offer discount on risk and insurance premiums.

Q I want to start so how do I order credits?

A Contact us so we can quickly access what is your specific need to start.

Q How to contact you?

A Contact details at the end of this document.

Q When can we start?

A Release your order and we start! An e-mail confirmation is sufficient

Contact us to learn more via info@productip.com

TIPS AND TRICKS

Zip file export

>> Go to 'your technical file'

>> Click the show details button below



>> Click export



Default choice is export.

>> Click export



A .zip will be created and saved to your hard-drive.

>> Open the .zip file. Select the relevant documents and print these the same way as any other document on your computer.

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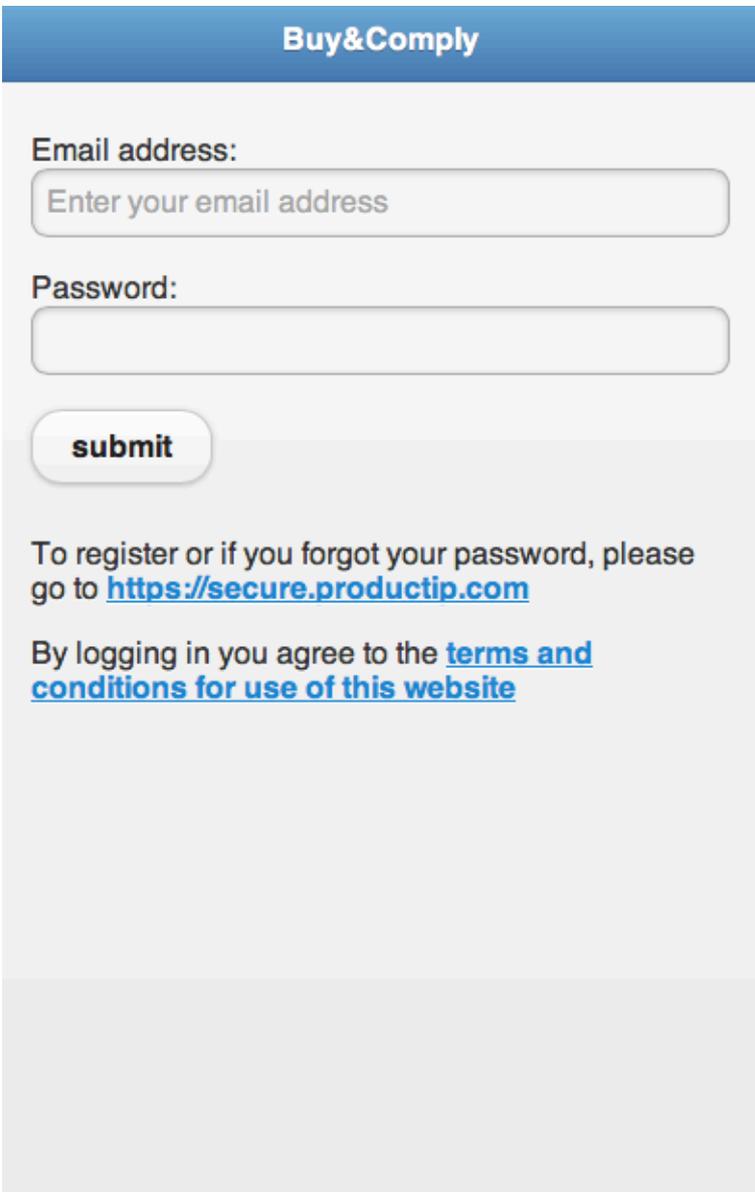
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BUY AND COMPLY

As a buyer you are on the road most of your time. With the introduction of a mobile website and apps for Android and iOS you can use the ProductIP system on-the-go.

Use our services on the go on your mobile device. <http://productip.mobi>



The image shows a mobile application interface for 'Buy&Comply'. At the top is a blue header with the text 'Buy&Comply'. Below the header, there are two input fields: 'Email address:' with a placeholder 'Enter your email address' and 'Password:'. Below these fields is a rounded rectangular button labeled 'submit'. Underneath the button, there is a line of text: 'To register or if you forgot your password, please go to <https://secure.productip.com>'. Below that is another line of text: 'By logging in you agree to the [terms and conditions for use of this website](#)'. The background of the form is a light gray gradient.

CONFIDENTIALITY DECLARATION

Contact us at info@productip.com if you wish to receive a separate copy

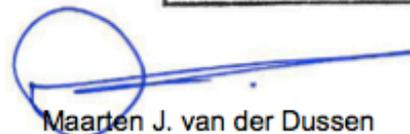
The Management of ProductIP declares:

- To keep secret all information they have obtained from the client or from any other source within the framework of the agreement with the client. Information shall be qualified as confidential if this has been stated by the party providing the information, or if this arises from the nature of the information. The provisions set forth in this paragraph shall not prejudice the right of ProductIP to have the agreement carried out by third parties under its responsibility. In that case, ProductIP shall impose the same obligation of secrecy on these third parties.
- ProductIP shall observe the greatest possible care, when using information that has come to their knowledge under the agreement.
- ProductIP agrees that information disclosed pursuant to this declaration which would otherwise be confidential information shall not be deemed confidential information to the extent that it can be proven by written records that said information:
 - is or becomes part of the public domain without violation of this declaration;
 - is known and on record at the receiving party prior to disclosure by the disclosing party;
 - is lawfully obtained by the receiving party from a third party who is not bound by similar confidentiality obligations;
 - is developed by the receiving party completely independently of any such disclosure by the disclosing party;
 - is ascertainable from a commercially available product.
- If ProductIP is forced to disclose confidential information to third parties on the basis of a statutory provision or a court ruling, ProductIP shall not be liable for damages towards the client for that.
- ProductIP General Conditions apply to all ProductIP services.

Date: March 1st, 2009



Caspar A.S. ter Horst



Maarten J. van der Dussen

TERMS AND ABBREVIATIONS

Assessment	A test, a study or an evaluation based on a standard
Audit	An (on-site) assessment in most cases of a quality control management system
BSCI	Business Social Compliance Initiative; social audit system on working conditions
BOM	Bill of Materials or Parts list
CCL	Critical Components List; list of components that are critical for safety
CDF	Constructional Data Form; information on the construction of a product
CE	European Conformity (French: Conformité Européenne)
COE	Council Of Europe
COP	Conformity of Production
CR	Commission Regulation
Decision	An EU decision is later implemented in regulations or directives
Declaration	A signed statement on product compliance
DIN	Deutsches Institut für Normung; German institute for standardisation
Directive	An EU directive is converted into national laws
DOC	Declaration of Conformity
EC	European Community or European Commission
ECHA	European CHEMicals Agency; EU's chemicals legislation institute
EEC	European Economic Community
EEE	Electrical and Electronic Equipment, term used in RoHS and WEEE legislation
EFTA	European Free Trade Association (Area)
EMC	Electro-Magnetic Compatibility
EN	European Standard
ERP	Energy Related Products; eco-design and energy labelling
EU	European Union
FQC	Final Quality Control
GPSD	General Product Safety Directive
IEC	International Electrotechnical Commission; global electrotechnology standardisation organisation
ILO	International Labour Organisation; UN organisation concerned with work-related social protection
IQC	Internal Quality Control
ISO	International Organisation for Standardisation; world's largest international standardisation organisation
LFGB	German food contact legislation
LVD	Low Voltage Directive
NBN	Bureau voor Normalisatie; Belgian normalisation institute
NEN	Nederlandse Norm; Dutch normalisation institute
NLF	New Legislative Framework
PCB	Printed Circuit Board; carrier of electronic components
PSI	Pre-Shipment Inspection
QC	Quality Control
QMS	Quality Management System

REACH	Registration, Evaluation, Authorisation and Restriction of Chemical substances
Regulation	An EU Regulation is enforced directly, without conversion into national laws.
RoHS	Restriction of Hazardous Substances
SKU	Stock-Keeping Unit
Standard	A formal (technical) norm or requirement
SVHC	Substance of Very High Concern
VDE	Verband der Elektrotechnik; German technical platform for electrotechnology
WEEE	Waste Electrical and Electronic Equipment

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