**ProductIP Quick Start Guide**

Welcome to the ProductIP Platform. Product compliance doesn't need to be overwhelming. This guide will help you get your first technical file off the ground with step by step instructions:

Step 1 - Buying Credits
Step 2 - Creating a technical file
Step 3 - Uploading documents
Step 4 - Inviting suppliers
Step 5 - Reviewing and matching documents
Step 6 - Finalising the technical file

If you have any questions that are not addressed in this guide, ProductIP offers a variety of valuable resources for getting started, including our:
- Several video tutorials,
- Answers to frequently asked questions,
- Technical support, support@productip.com
- Regulatory support, expert@productip.com
- And more.

Now let's get started.



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Before we get started you should know that ProductIP is a web-based application that works in most web browsers, which means that you do not need to download or install any new software on your computer. To make sure that ProductIP works properly in your browser, you should enable cookies, pop-ups and JavaScript.

**Step 1 – Buy Credits**

In order to be able to create a technical file you will first need to purchase credits.

You need at least 1 credit in order to be able to create one technical file. A file can cover a small range of articles from one supplier.

You will also need credits in case you need additional support from our team.

Our pay-as-you-go model allows you to buy credits the moment you need them. You order credits online and these are instantly added to your account. You will receive an invoice per e-mail.

Click here to buy credits now.

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## Step 2 – Create a technical file

Start the process by clicking on [ Create a new Technical File ]

In order to generate the correct requirement list that is the basis for your technical file, the Platform will ask you to provide the following information:

- The article name,
- The article number,
- A description of the article,
- The market introduction date,
  (The approximate date that the product will go through the EU customs)
- Supplier contact details*,
- The countries in which you plan to sell the products,
- The product category - This requires some experience. In case you have doubts, choose the product you think matches your product and finish the Q&A that follows. In the final step of this wizard you can choose [FAST] in case you would like our File Assembly Team to act on your behalf by adjusting the file for you, contacting the supplier, collecting and reviewing documents and more. If you don't have sufficient credit balance, finish the wizard first, purchase additional credits and upgrade the service level to FAST.

A technical file can cover additional similar products from the same supplier. For example colour variations or different sizes. You can add additional articles on the product tab once you have completed the wizard.

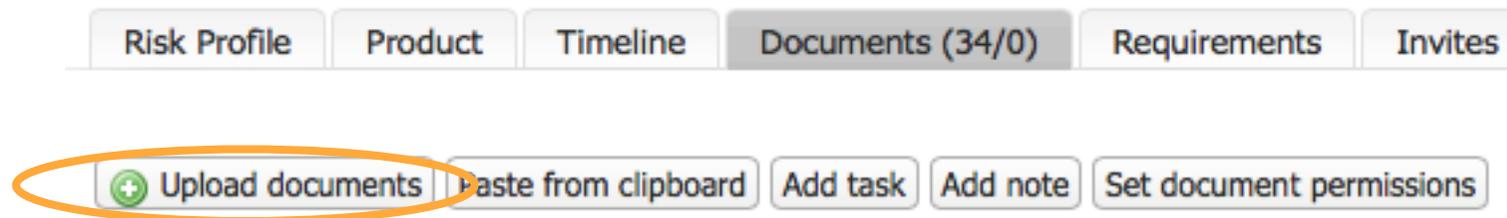\* Each account has it's own address book.

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**Step 3 – Upload documents**

Within the file you need to start collecting documents that allow you to demonstrate that the product complies.

Upload the documents that you already have to match the different requirements on the list.

Click on [ Upload documents ] in the Documents tab and follow the instructions.



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**Step 4 – Invite the suppliers so they can upload documents also**

Go to the INVITE tab and click on [Invite your supplier].

The invite is an e-mail from your account in the platform to the supplier arranging that they can perform one task namely:
- upload documents that they have into your file,
- indicate what kind of a document it concerns (test report, certificate and so).

Once they have done that and sign off that task, they can no longer access your file.

After you have reviewed their effort, you can assign them a task to provide any missing information, and this will give them access again, until they sign off this task.

If required, ProductIP can support your supplier when it comes to using the ProductIP Platform.

Your supplier can only see documents that they have uploaded themselves and don't have access to other information or other files. You can instantly deny your supplier access to a file by deleting the invite.

**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.

E-mail Address: *
Company:
Company code:
First name: *
Middle name:
Last name:
Title: *     Mr.
Subject:

Message:

Select requirement category
- ☑ Declaration of Conformity (DOC)
- ☑ Type testing - Recall and fine* (A)
- ☑ Production - Recall and fine* (B1)
- ☑ Production - Sales-stop and fine* (B2)
- ☑ Production - Warning and fine* (B3)
- ☑ Transport (T)
- ☑ Performance and specification (C)
- ☑ Corporate responsibilities (D)
- ☑ Business critical requirements (E)
- ☑ Company specific requirements (F)
- ☑ Guides and Test methods (G)

Required completion date: 2015-09-10

Attachment 1: Browser
Attachment 2: Browser
Attachment 3: Browser

☐ Include reference guide
☐ Send me a CC of the invitation
☑ Include supplier product name and article number

Cancel

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**Step 5 – Review and Match It!**

Go to the Documents tab and click on the underlined document name of the document in the first row. The document will open in a special viewer page.

5.1 Click on the [EDIT METADATA] icon. Add the information that you see as relevant for structuring your documentation. Set the expiry date in case it is relevant. It will be a trigger in the future alerting you. Ensure that the document category is set, adjust it if you feel that the supplier has made an error. Press [SAVE].

5.2 Now click on the green [Match It! to requirements] icon. The Match It! tool will scan the document to offer you a suggestion to which requirements it should be linked. In case the document type cannot be scanned the document category will be used to create a suggestion.

Adjust the selection if you think it should be adjusted and choose the blue button to link the document to the selected requirements. Choose the green button if the document provides sufficient evidence to fulfil the requirement.

5.3 Click on the arrow to the right of the document name in the top of the window to move to the next document.

Repeat step 5.1 - 5.2 - 5.3 until you have covered all documents.

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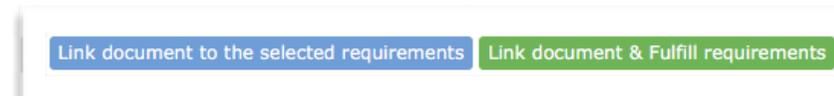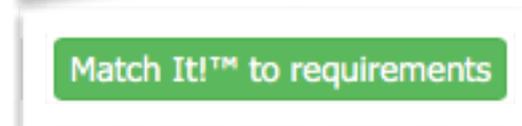
### Step 6 – Next steps towards finalising the file

Now it is time for you to have a closer look at the risks concerning your file. There are two ways to do that:
1. Click on the Risk Profile tab to get an visual overview of the current status of the file, or
2. Go to the Requirements tab and evaluate what is still missing.

Next steps could be:
- Issue your supplier another task (on the TIME LINE tab) to upload missing documents,

- Create an inspection plan, start additional testing to obtain missing evidence,

- Ask our expert team to perform a Label / Manual check,

- Ask our experts to perform an XRF scan of packaging or electronics to check for the presence of any restricted heavy metals.

3. When you decide that you have enough compliance evidence in order to release the product into the market,  you should set the file to FINAL status. Go to the Product tab, bottom of the right column. First Pre-Finalise the file (this is a review status for larger organisations) then Finalise the file.

Now, the ProductIP Platform will start monitoring the status of the file and will register any change based on the introduction of new or additional requirements or documents that expire.

**Technical File Controls**

Pre-finalize
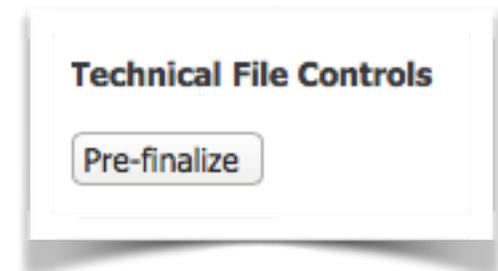
✔ File is currently valid   ⚠ Requirements/documents expire in 3 months/new requirements available   ❗ Requirements/documents expired/new requirements effective

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**Education and support**

This guide covered all the basics for getting started and creating your first technical file with ProductIP. But we have only scratched the surface of our available resources. As you learn about ProductIP you'll find new data, options and other options to help take your product compliance to the next level.

If you have any questions that weren't addressed in this guide, visit our Service Desk for more information or contact our support team directly.

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