



icM Overview & Implementation

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Table of Contents

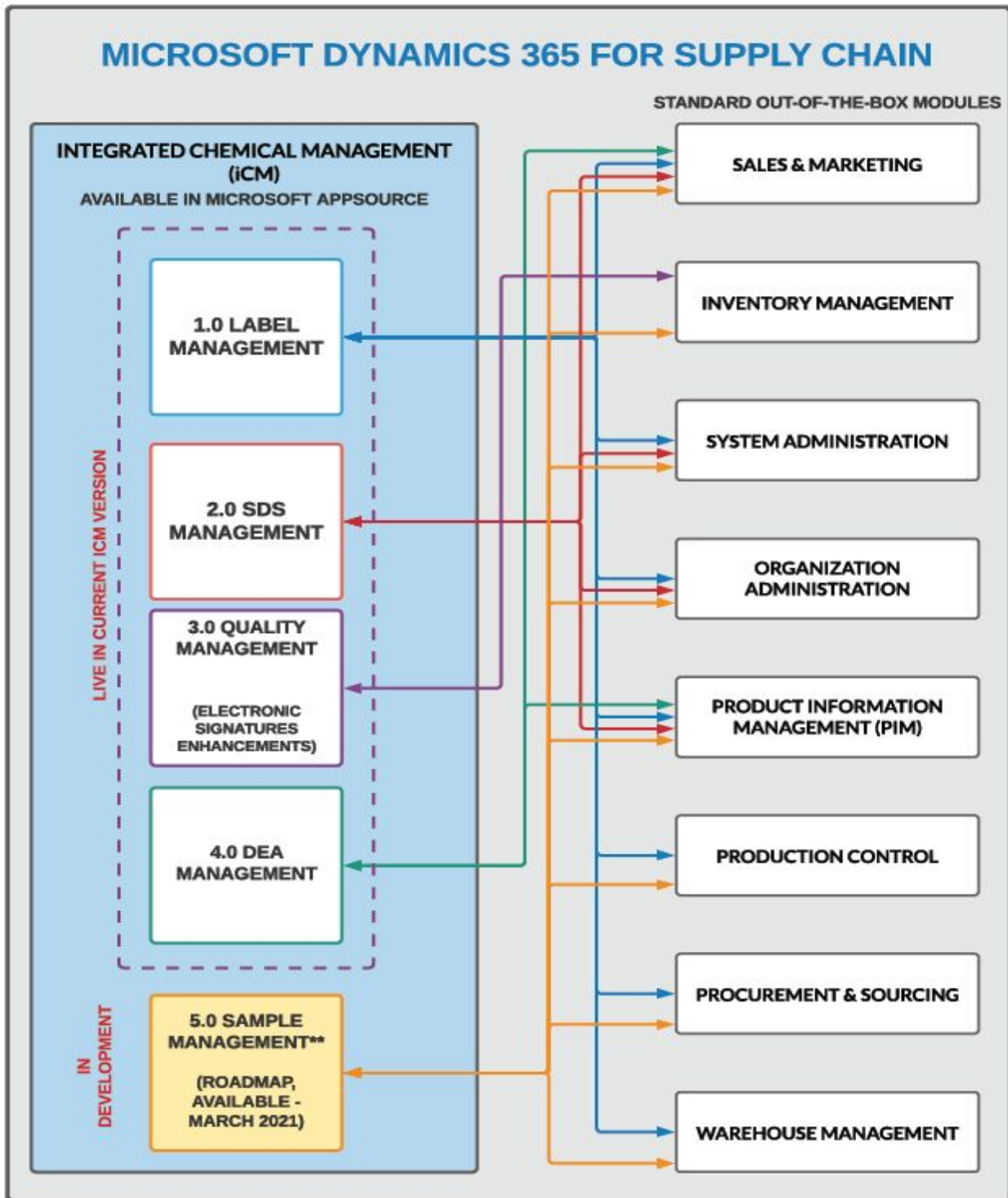
Overview	2
The Industry Need - What problems do we solve?	4
Implementation Methodology	6
FEATURES & FAQs	7

Overview

Integrated Chemical Management (iCM) is an industry-first integrated solution for Microsoft Dynamics that offers comprehensive functionality for -

- SDS-Authoring and Maintenance,
- Label Management (including Private Labels) and
- DEA Management in compliance with GHS guidelines.

iCM has been designed as an integrated module within Microsoft Dynamics 365 for Finance and Supply Chain. It provides an impeccable security and seamless connectivity to your regulatory data for use in real-time transactions within Microsoft Dynamics.



The Industry Need - What problems do we solve?

1. DATA

- iCM solves the pain-point of maintaining and accessing chemical & regulatory data in 3rd party systems outside of your core ERP system and helps you to leverage this data real-time for your operations.
- iCM will be the repository / System of Record (SOR) for all regulatory data.
- iCM will help mitigate possibilities of data contamination by making your regulatory data organized and accessible within Microsoft Dynamics.
- Clean regulatory data is pivotal to your real-time operations and can help avoid compliance related penalties.
- A key element is that iCM can be scaled to meet the data structures for any regulatory compliance software.

2. INTEGRATED SDS

- With iCM, Microsoft Dynamics customers no longer need to maintain Safety Data Sheets (SDS) outside their ERP system.
- Fully integrated regulatory data at the formula / item level SDS authoring
- Embedded workflows for SDS authoring and approvals
- SDS Distribution via email
- Regulatory chemical data can be converted one-time and / or be integrated with 3rd party chemical compliance software.

3. LABELS

- iCM eliminates the need to develop and maintain labels outside of their ERP.
- With reusability of labels and label templates, iCM will be your system of record for all labels.
- Labels are integrated into the operational workflows like Production, Shipping etc.

Return on Investment (ROI) - Cost Avoidance & Lower TCO

Estimated Cost avoidance (only for Label Management) > \$75,000 (1st year).

- Estimate includes a few key workflows and labels
- Minimum cost avoidance for "LABELS ONLY"– Approximately 350 hours
- Cost avoidance estimate for "LABELS ONLY", 350 hours > \$75,000 (1st year & lower after with maintenance costs etc.)

Note - Development lifecycle (Specs, Development, Testing & Production) of each workflow is estimated to be 50 hours.

Pre-Developed Labels

- List of pre-designed & developed labels / label templates that you can choose from. (Estimate of Dev cycle - 20 hours for a label).

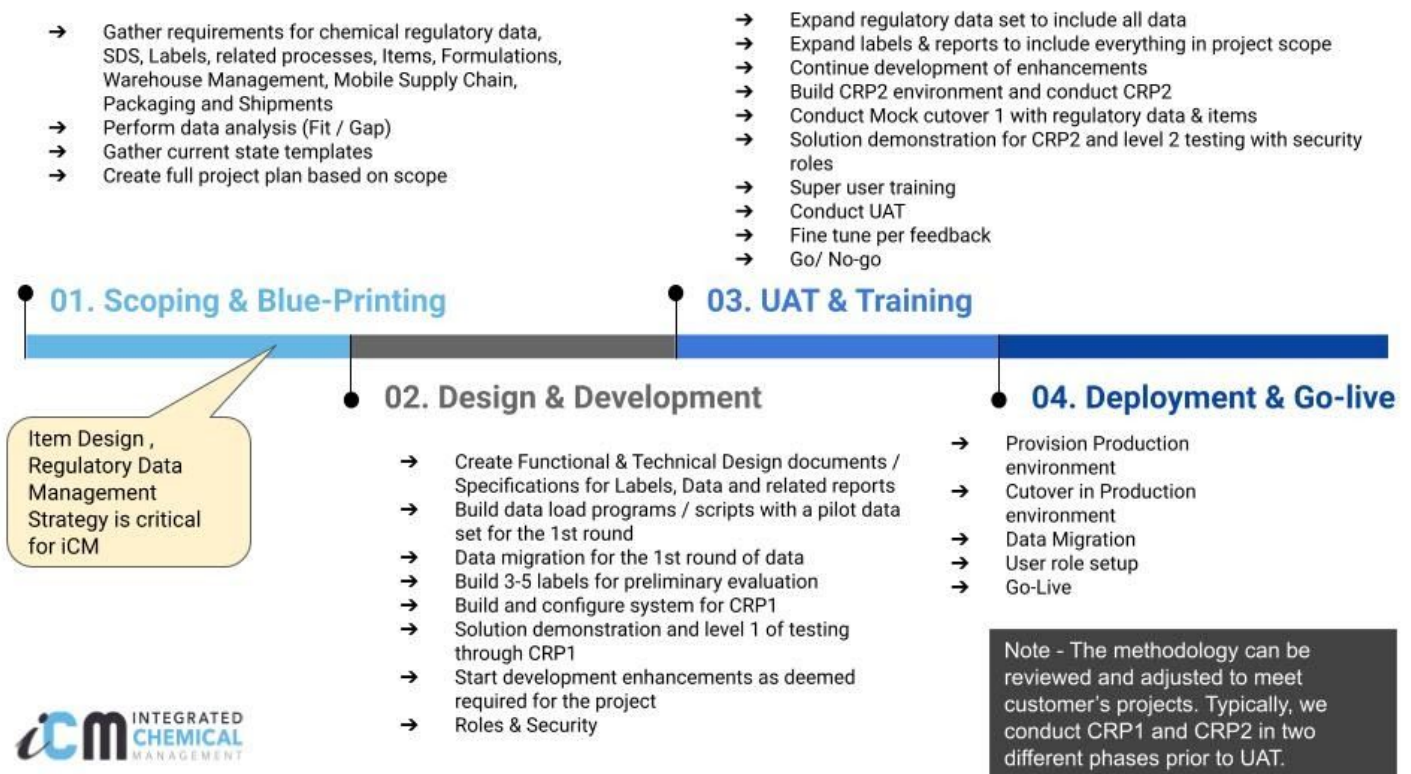
Note – Even if these labels are not used "as-is", using these as the basis will save significant time for development.

Infrastructure to house Chemical Data (Tables, screens and related development)

- This architecture will allow you to maintain chemical data within Dynamics, making this easier for your real-time transactions.
Note – You will require these processes & infrastructure to minimize dependency on external 3rd party chemical data.
- Eliminate the need to maintain chemical regulatory data in disparate systems
- Eliminate cost of integration to 3rd party Labeling and SDS systems
- Eliminate cost of redundant and expensive customizations.
- Eliminate time and labor to print, maintain and automate labels. Save costs by reusing the labels created once for other business uses / customers.
- Eliminate time and resources to manually maintain regulatory data for Labeling and Safety Data Sheets (SDS)
- Built-in Automated Workflows
- iCM's Label Management eliminates the cost of customizing workflows in Microsoft Dynamics 365.
- Integrated Safety Data Sheets Management has built-in & automated workflows for SDS authoring and maintenance

Implementation Methodology

- The picture below depicts our recommended methodology for implementing iCM with all its key components (Regulatory data, Item design, Label management & SDS Management).
- We will work with our customers to establish the appropriate project management methodology depending on the scope of the project.



FEATURES & FAQs

FREQUENTLY ASKED QUESTIONS (FAQ'S) FOR THE CHEMICAL INDUSTRY - REGULATORY SOFTWARE. LABEL MANAGEMENT & SDS MANAGEMENT

NO.	FEATURE	COMMENTS
SECTION 1 - ICM OVERVIEW		
1	What is iCM?	<ol style="list-style-type: none"> 1. Integrated Chemical Management (iCM) is an industry-first integrated solution for Microsoft Dynamics that offers comprehensive functionality for SDS-Authoring and Maintenance, Label Management (including Private Labels) and DEA Management in compliance with the GHS guidelines. 2. iCM is integrated with Microsoft Dynamics 365 for Finance and Supply Chain, providing impeccable security and seamless connectivity to your regulatory data for use in real-time transactions within Microsoft Dynamics. 3. iCM eliminates the need for 3rd-party integrations to Label Management and other real-time integrations to Chemical regulatory software. 4. iCM will be your System of Record (SOR) for all chemical and regulatory data.
2	What are a high-level features of iCM?	<ol style="list-style-type: none"> 1. Safety Data Sheet management (Authoring, Maintenance & Distribution) 2. SDS versioning, SDS by country & language 3. Label Management 4. Unlimited Label templates for reusability, Private & distributor labels 5. DEA holds (embedded into the Sales Order workflow) 6. Extensive list of Physical, Chemical properties and Regulatory data for GHS Labels, SDS's etc. 7. Embedded workflows for SDS, Labels 8. Role-based Security for Label & SDS Management
SECTION 2 - ICM SECURITY		
3	Does iCM support role-based security across different roles in a Chemical or Pharma company?	Yes. iCM offers 13 out of the box roles.
4	What are some out-of-the-box iCM roles?	<ol style="list-style-type: none"> 1. iCM DEA administrator 2. iCM DEA hold 3. iCM DEA maintainer 4. iCM DEA release 5. iCM label administrator 6. iCM label manager 7. iCM label print user 8. iCM label viewer 9. iCM SDS administrator 10. iCM SDS approver 11. iCM SDS author 12. iCM SDS master data manager 13. iCM Administrator
5	What are some of the job functions that will need access to iCM?	<ol style="list-style-type: none"> 1. Anyone that requires a view or update of of Chemical / Regulatory data of an item or formula in the Product information Management (PIM) module. 2. Anyone that defines and configures labels for different transactions 3. Anyone that prints labels in the back-office or on the shop-floor 4. Anyone that maintains chemical regulatory data 5. Anyone that authors, views or distributes Safety Data Sheets (SDS) or related information 6. Anyone that works with DEA customers or contacts
SECTION 3 - SDS MANAGEMENT OVERVIEW		
6	What are a few high-level features for Safe Data Sheet Management (SDS) in iCM?	<ol style="list-style-type: none"> 1. Safety Data Sheet (SDS) Authoring 2. SDS Master Data Management (16 sections) 3. SDS Versioning (Major and Minor Versions) 4. SDS Approval Workflow 5. SDS Distribution - iCM provides the ability to distribute SDSs in batch or individual / adhoc (email, print etc.). SDS can be distributed from safety data sheet maintenance screens and / or from sales orders. The distribution can be done for multiple items and / or multiple customers from iCM. 6. Generate SDS documents post approval (Publish your SDS in PDF and store in SharePoint) 7. Archive historical SDSs 8. Multiple SDS documents by item, country and language (one active SDS only per item, per country and language) 9. Extensive Chemical / Regulatory Information Management 10. Master Data Elements using Excel and Data Import Export Framework (DIXF) 11. SDS Audit Management / Change log 12. Role-based Security (ex. SDS Author, SDS Maintainer, SDS Approver, SDS Viewer, DEA approver etc.) 13. iCM offers the ability to author SDS's with embedded workflows for approval and previews before submission for approval. Future state will be to preview as each section is updated. 14. Management of supplier/vendor SDSs 15. Version management (Major & Minor versions)

FREQUENTLY ASKED QUESTIONS (FAQ'S) FOR THE CHEMICAL INDUSTRY - REGULATORY SOFTWARE. LABEL MANAGEMENT & SDS MANAGEMENT

NO.	FEATURE	COMMENTS
SECTION 4 - LABEL MANAGEMENT OVERVIEW		
7	What are the Label Management functions within iCM?	<ol style="list-style-type: none"> 1. Primary and Secondary Labels 2. Adhoc labels (of any kind) 3. Raw Material (internal) - Printed either adhoc or from the PO (parameters same as Finished goods) 4. Finished Goods - Printed either adhoc or at the time of report as finished on production (parameters are item#, batch#, manufacturing date, expiration date, quantity, unit of measure, label format, brand, printer) 5. DOT - Printed either adhoc or on the Sales Order (parameters - item number, number of labels, printer, label format) 6. Shipping - Printed either adhoc or from the Packing Slip (sales order #, number of labels, label format, printer) 7. Lab Label - Printed either adhoc or from the Quality Order (item, batch, qty, label format, number of labels, printer) 8. Ability to print simple labels with basic information and instructions for non-hazardous items. 9. Audit of all label prints/ logs by use,r by item/ batch, by date. 10. Security roles to print labels.
8	Which transactions have label printing embedded in the workflow?	<ol style="list-style-type: none"> 1. Product receipt for raw material label 2. Production Report as finished for finished goods label 3. Packing slip for finished goods and shipping labels
9	Is it possible to include label printing as part of other transactional touch points?	Yes. iCM can be extended to other transactional touch points as well.
10	Ability to handle multiple brands ("private labeling") / Alternate Trade Names for a given product.	This is an out-of-the-box feature in iCM.
11	Country specific label templates that comply with requirements of country, regulatory agency etc. and are consistent with information on the associated SDS	iCM offers the ability to create, maintain and reuse labels & label templates across a variety of processes within the chemical supply chain. You are able to create a specific label template for a country / agency and save it in iCM.
12	Approved labels managed through compliance software	iCM provides the ability manage pre-approved labels. Label definition within setup allows users to only use approved labels
13	Label printing capability to support global manufacturing needs	This is an out-of-the-box feature in iCM.
SECTION 5 - GLOBAL REGULATORY DATABASE - CHEMICAL INFRASTRUCTURE		
14	Can iCM connect to a Global regulatory database like Ariel, LOLI or similar?	<p>A. iCM provides the system, processes and infrastructure to house the chemical regulatory data and does not include a global regulatory database out-of-the-box.</p> <p>B. We are able to build interfaces to 3E (Ariel), LOLI (or similar databases) via approved and subscribed APIs. The APIs exposed by the global chemical databases are dependent on the level of subscription specific to the customer.</p> <p>C. iCM has the ability to house regulatory data and distribute to real-time transactions within Microsoft Dynamics 365 for Finance & Supply Chain (AX, Finance & Operations)</p> <p>D. We will be able to extend iCM to include any chemical / regulatory information that does not exist currently. is not integrate with any regulatory content into iCM and Microsoft Dynamics 365. Regulatory content will be housed in iCM.</p> <p>Note - Interfaces to both 3E or LOLI require custom development which has not been included in the RFQ estimate.</p>
15	How often can you update the regulatory data (frequency) ?	iCM will be able to interface with any global regulatory database and retrieve data at any frequency. (Weekly, Quarterly or more often)
16	Ability to view/ access regulations for all countries in English within the associated Reg database (i.e. Ariel/ Lolli)	If you are subscribed to API's for Ariel & LOLI that provide the ability to view / access regulations in English, we will be able to accommodate that.
SECTION 6 - REPORTS & OTHERS		
17	Does iCM provide the ability for user interface input in multiple languages. Software hard coded fields / data entry titles in English	iCM will be able to support input in multiple languages as part of the Microsoft Language pack.
18	Does iCM have the ability to author country specific SDSs in English and languages required for each country	This is an out-of-the-box feature in iCM.
19	Does iCM include built-in search tools including global regulations, where-used, and ingredient searches?	Microsoft Dynamics ERP provides out-of-the-box functionality for "Where-used" and "Ingredient searches" within the Formula Management module. Global regulations search is not included within iCM out-of-the-box. However, this functionality can be evaluated and developed for an iCM customer.
20	Do you have the ability to generate reports in iCM (Ex. ingredient statements, RoHS etc.)?	We have the ability to generate custom operational and regulatory reports within iCM as required by the customer.
21	Does iCM have the ability to maintain vendor supplied country-specific SDS & Label templates that comply with the specified entity regulations? Ex. Section 15 - National legislation and requirements.	iCM and Microsoft Dynamics provide the ability to maintain vendor supplied country-specific SDS's and Label Templates as attachments at the item level.
22	Does iCM have the ability to update multiple SDSs simultaneously for changes in material classifications?	This is currently not an out-of-the-box feature in iCM, however it can be developed for our customers.
23	Does iCM have SDS version management with archiving of older versions?	This is an out-of-the-box feature in iCM.

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24	Does iCM have the ability to override data and displayed values?	This is an out-of-the-box feature in iCM. Chemical data updated manually or sourced from regulatory databases can be overridden in iCM.
25	Ability to add custom physical or regulatory information	This is an out-of-the-box feature in iCM. Custom Physical or regulatory information can be updated in iCM. Any missing properties can be brought into the iCM.
26	Management of substances with and without CAS numbers	Microsoft Dynamics provides the management of items with / without CAS numbers. iCM allows the maintenance per safety data sheet for both substances and mixtures
27	Can iCM be extended to include additional fields or functionality required by our business?	Yes. iCM can be customized by its development team to suit your organization's business requirements. If this is a generic industry requirement, it will included in the product for next release. If the requirements are specific & strategic to your company, we can still extend the system and keep it specific to your company's deployment only.
28	Transport-specific calculations (ADR, IATA, IMDG, etc.)	This is currently not an out-of-the-box feature in iCM, however it can be built for an iCM customer.
29	Are you able to maintain formulas and end-product-compositions for products?	Microsoft Dynamics ERP provides out-of-the-box functionality to maintain formulas.
30	Templates for eSDS, Safety Instruction Cards, etc.	Templates can be created in iCM for items to copy into safety data sheets at the time of creation.
31	Does iCM have the ability to include custom physical chemical fields for specialized / company specific data?	iCM includes an extensive list of physical and chemical properties at the item level. However, if an iCM customer requires additional fields, they can be included.
32	Ability to attach notes, supporting reference information to materials	Microsoft Dynamics ERP provides out-of-the-box functionality to attach notes and supporting reference information at the item level.
33	Material level, system level and master settings	Yes, iCM and Microsoft Dynamics ERP include material and system level settings.
34	Ability to generate SARA 312, KREACH, EU REACH, Customer Specific Reporting, Canadian NDSL, etc. reporting information.	iCM has the ability to build custom reports as required by client.
35	Alerts, approvals, workflows	This is an out-of-the-box feature in iCM.
36	Any other tools, templates or solutions iCM could provide to compliment, enhance, improve regulatory compliance and abilities	Data Templates will be provided to upload base regulatory data and SDS's into iCM.
37	Ability to interface with business software to access formulas, orders, etc.	iCM is an embedded software within Microsoft Dynamics 365 for Finance & Supply Chain. Anything within the ERP is seamlessly connected and accessible to iCM.
38	Can iCM handle DEA holds on sales by customer, contact and location?	Yes
SECTION 7 - ADMINISTRATION & LICENSES		
39	Ability to modify levels of access for different users	This is an out-of-the-box feature in iCM.
40	License number of simultaneous users rather than named individuals	This is an out-of-the-box feature in iCM.
41	Security and access administered by client IT	This is an out-of-the-box feature in iCM.
SECTION 8 - SOFTWARE SUPPORT & TRAINING		
42	How does the support contract for iCM work? Is support allotted per month, or per year? Can it be carried forward.	1. Support contract can be designed by what works best for client - monthly or annual. 2. Support hours can be allocated towards special projects as well. 3. XcelPros and iCM have a very high level of skill and expertise in all modules / functions of Microsoft Dynamics. Any support hours purchased for iCM can be repurposed towards Microsoft Dynamics if required. 4. Carry forward can be reviewed / discussed as required.
43	Maintenance agreement	Annual
44	Startup support and regulatory team training sessions	Yes. Training will be provided at the agreed upon resource cost for the project.
45	Regular Software updates to fix glitches that always are found from version to version	Yes, iCM will provide defect fixes as required and periodic software updates per Microsoft's update schedule.
SECTION 9 - COST & LICENSING TERM		
46	Cost	Please refer to the iCM licensing sheet.
47	Licensing term	iCM licensing requires an annual contract, dues can be paid monthly or annually.

Note - Integrated Chemical Management (iCM) provides the infrastructure, workflow and processes to author and maintain SDS. iCM and XcelPros do not take the responsibility for the chemical data maintained in the system. The end-user / customer using iCM takes full accountability of the data that is printed on the labels, SDSs and any other external facing documents.