B2Biscom

The Business Connector

Catalog Management System

version 1.5.1

User Manual

Catalog Management System

User Manual

FIRST EDITION

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PREFACE

Purpose of This Manual

This manual describes B2Biscom's Catalog Management System (referred to as "CMS" or "System") and its user interface.

The Manual is targeted at System's end-users and serves a two-tier purpose: to cover in concise overview style the system's interface logic and to serve as a handy reference book when detailed information about a certain interface element (screen, field, etc.) is needed.

The Manual does not address system administration tasks, like System's first-time installation and database management, as such tasks go beyond the scope of end-users needs. The Manual is intended as an additional tool and not a substitution to the training B2Biscom provides to System's users.

Users of this Manual

This Manual is intended for:

- CMS Security Managers;
- CMS Administrators;
- CMS Operators.

For further details on System's users, refer to "System's Users" chapter in the 'Introduction and Overview' section.

Scope of the Manual

The Manual provides information about the System's interface, describes the elements of the System's screen, and gives some instructions about using the System's features and functionalities.

In the Manual you will find out:

- HOW to use the System's interface and
- WHAT each element of the interface does.

In the Manual you will not find:

- explanation of the BUSINESS PROCESS underlying the System's features and
- WHY doing certain task is necessary with regards to the business process

as these are part of the business model perspective of user's job and go beyond the goal scope of a technical manual. I.e. users should know in advance what they are supposed to do, and the Manual is here to help them to do it using the System.

With regards to this, the System-specific and the software-specific notions and concepts (like "Flat File", "Product Type Attributes", etc.) are duly explained in the Glossary (see the Appendix). Also, some business realm concepts which have slightly different meaning in the System compared to their typical usage (like "Publisher"), have been explained, too. Most of the concepts explained in the Glossary are capitalized in the text.

Style of the Manual

This Manual is designed to focus on Systems' specific functionalities and procedures and avoids any descriptions that may reiterate Windows' ® generic functionalities, e.g. the Manual would say *"From Administration menu, select "Exit""*, rather than *"Click with the primary mouse button on "Administration" to open the menu, then from the menu click "Exit" with the primary mouse button"*. Hence, to use this Manual, prior user-level knowledge of Windows environment is required.

Which Chapters To Read and When

- Prior starting work with the System:
  1. First, peruse the Glossary in the Appendix to get a quick grasp of the terminology used.
  2. Then read the 'Introduction and Overview' chapters prior to beginning your work with the System. For best results, log-in to the System and check things online while reading. Where necessary, make references to the terms' descriptions in the Glossary.

The rest of the document deals with specific screens and their elements. You'll need to refer to them only when you feel the need for more information on a particular screen / screen element.

- While working with the System:
  - Make references to the respective chapter when necessary.

Formatting Conventions

In order to make explanations easier to read and understand, certain types of information bear their own distinctive formatting, as follows:

- screen elements (buttons, fields, etc.) are written in san-serif type of font.

  Example: "Click the Personal Details button to the right of the field to open that window.";

- the pre-defined selection options in combo and list boxes are written in *san-serif italics*.

  Example: "The three User Types (Security Manager, Administrator, and Operator) are listed as *MAN, ADM, OPE*, respectively."

- user input samples (i.e. the text that you need to type/change) are written in `typewriter-like type of font` without quotes.

  Example: "Type-in the real name of the person using the account, e.g. `John Smith`."

- where fields are explained in glossary-like style, required fields are indicated with * (asterisk).

  Example:

  Login Name *field* *

  Login Name for the currently highlighted User's Account. The Login Name is NOT case-sensitive and can be up to 32 characters long.

Technical Support

B2Biscom technical support is available to licensed users by phone and e-mail, or over the Web.

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Web:	www.b2biscom.it
Office:	Via Principe Eugenio 48 – 20155 Milano

INTRODUCTION AND OVERVIEW

System's Purpose

CMS provides product data management and syndication for procurement and marketplace publishing purposes.

System's Terminology

The system-specific terminology is explained in the Glossary (see the Appendix). Note that some terms may have both generic and specific meanings, e. g. "user" and "User" ("user" = human who uses the System; "User" = "User Account", i.e. account for that human in the System). In such cases capitalization helps you differentiate the meanings (system-specific meanings use capitalization).

System's Users

User Requirements

This Manual is written with the following assumptions about you as a user of the System:

- you are familiar with MS Windows® environment and have working knowledge about how to use it;
- with regards to the System, you perform any of the following three job functions described below (Security Manager, Administrator, or Operator; see 'Types of Users").
- you have at least basic understanding of taxonomy and classification systems with regards to their business use (except for Security Manager);
- you are familiar with catalog management and syndication processes (except for Security Manager);

- your knowledge of MS Excel ® is at advanced user level (Operator only);
- the party supplying the System has provided initial live training for you on how to use the System.

Types of Users

There are three types of Users of the Catalog Management System – Security Manager, System Administrator, and System Operator. Each of these three User types has a different role with the System, related to their specific job functions and responsibilities.

The System has been developed with the assumption that each role will be performed by a different person, so there are three different and separate user interfaces in the System, one interface for each User type; the tasks that can be performed in each interface does not overlap.

Each user logs individually to the System and accesses only the interface corresponding to his/her User type. If an individual performs on his/her job a combination two (e.g. both System Administrator and System Operator) or all three roles, he/she must have, respectively, two or three separate User Accounts with the System and should log-on as the relevant System User for the type of task he/she intends to do.

Security Manager's Responsibilities with the System

The Security Manager:

- creates and manages all User Accounts – the Administrators, the Operators, and the other Security Managers;
- assigns and can change users' names and passwords;
- controls the access level to the System for every user by assigning a User Type to each user (Security Manager, Administrator or Operator type of access);
- creates, manages, and retrieves some additional personal information about each user;
- generates reports about the User Accounts and can modify the report template.

Administrator's Responsibilities with the System

The Administrator:

- sets up and manages Companies;
- assigns Operators to each Company;

- is responsible for all Metadata used by the System. This comprises managing
  - System Languages;
  - Currencies;
  - Countries;
  - Attributes used for describing products, selling information, and attachment files;
  - Product Classifications;
  - Product Types.
- defines and manages the Syndication Formats to be used by Operators;
- sets up and manages Marketplaces.

Operator's Responsibilities with the System

The Operator:

- maintains Product information;
- maintains the Attachment Files;
- syndicates and exports data for publishing;
- uses and manages the Reporting module of the system. This includes:
  - creating and modifying report templates;
  - generating reports;
  - visualizing previously saved reports.

System's Features

Following are some of the features supported by the current version:

- multiple System Users, falling into three User Types;
- separate user interfaces for each user type;
- simultaneous multi-user access;
- password-protected logon to the System;
- multiple instances interface;
- extensive User management;
- maintenance of multiple suppliers;
- maintenance of multiple languages (except for the interface language);
- maintenance of multiple currencies;
- maintenance of multiple countries;
- multiple-field search capabilities;
- record filtering capabilities with advanced features as defining and saving filters with search masks and complex search expressions;
- maintenance of user-definable Product Types;
- extensive Product Type and file attachment management;
- maintenance of multiple standard and user-defined product classifications;
- maintenance of flexible user-definable attributes of Product Types and file attachments;
- import and export of product classifications;
- automated product information input via MS Excel® spreadsheet or Flat File;
- maintenance of flexible user-definable syndication formats;
- maintenance of multiple Publishers;
- extensive reporting features, including user-definable Report Templates.

System's User Management

The Users of the system are managed entirely from Security Manager's interface by the Security Managers. They are responsible for assigning a logon name, password and User Type for each user. The User Type option determines which interface (Security Manager's, Administrator's, or

Operator's) a user will be able to access. The password of a user can be changed by any Security Manager if necessary.

The Security Manager's interface allows also for optional maintenance of some User personal data.

All Security Managers have equal rights in the System and equal authority with regards to User maintenance. The Security Manager interface is covered in detail in the Security Manager Guide

Localization

The System allows for localization in the following aspects:

- Language;
- Currency;
- Country.

Each of these aspects is covered briefly below.

Interface, Context and Data Languages

The Administrator defines the languages available to the System (from the Languages folder). The System allows for definition of an unlimited number of languages. The Security Manager sets a default Context Language for each Administrator and Operator. When using certain language, the respective Data and Metadata in this language need to be fully entered in the System, otherwise the System will display blanks where some pieces of data are not available in the selected language.

Context Language

Administrators and Operators can change the Context language they are working in for the current session (from the Tools menu). This change is global (all over the interface) and affects the names of the Products Types, Product Categories, and Attributes.

Data Language

Data Language is not affected by the selection of a Context Language. Data Language can be changed locally from some Administrator's and Operator's screens and affects only certain data displayed on these screens. E.g. you can work with Product Types and Attributes in one language while displaying the values of these attributes on a certain screen in another.

Default Context Language

The selection of a Context Language from the Tools menu described above does not affect Users' default Context Language. When a Users logs on, the System always starts up in his/her default Context Language. The default Context Language is managed from the Security Manager interface.

Interface Language

The System's interface language cannot be changed and is always in English.

Currency

The currencies available to the System are set by the Administrator from the Currencies folder. The currencies are used by the Administrator when managing Publishers (Administrator interface, Publishers folder) and by the Operator when he/she has to choose the appropriate currency when importing/exporting pricing information.

Country

The countries available to the System are set by the Administrator from the Countries folder. The countries entered enable the Administrator to select a country from a list when entering/editing company information.

Product Management

The System allows for flexible product management. The Administrator is free to define Product Types and assign Attributes to them to meet any syndication requirements. In addition to Product Types, the Administrator can define, create, and/or import entire or partial Classification Systems. The Classification Systems can be standard ones, like UNSPSC, or proprietary systems of the Administrator's company or its suppliers or publishers.

Defining Product Types is required; using Classification Systems is optional. When a Classification System is used, the lowest level categories of the Classification System need to be mapped to the available Product Types.

Syndication Management

The System enables the Administrator to set up and manage multiple syndication formats (from the Syndication Formats folder). Syndication formats can be easily created through pre-defined sets of attributes and data formats. The defined Syndication formats are available to the Operator for selection when he/she performs syndication of data.

Publisher Management

The System enables the Administrator to manage Publishers and store syndication-related and company-related information about them. Each publishing service provider needs to be registered as a company in the Companies folder first. After that, in the Publishers folder, the syndication-related information is added. It comprises the languages, the currencies, and the syndication formats in use by the publishing service provider.

Reporting

The System enables Users to perform context-sensitive reporting. This means that Users can generate reports related to the information that is on the current screen without leaving the screen.

In addition to this, the Operator can generate any report related to his/her job function from the Reporting folder.

All Types of Users can create and edit Report Templates.

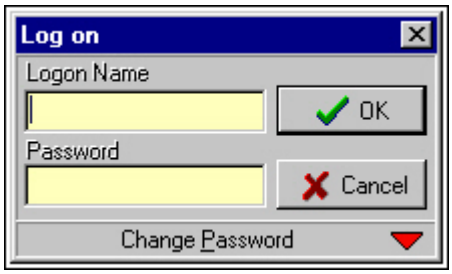
Reporting is covered in detail in the "Generic Functionalities of the System" chapter.

Systems' Interface

Logging on To the System

To log on to the System:

1. Start CMS from its shortcut in the Programs menu. The Log on window pops up.

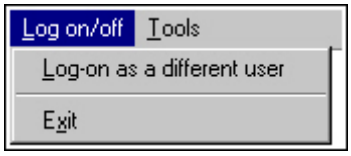


2. In the Logon Name field, type-in your user logon name.
3. In the Password field, type-in your user password (**case-sensitive!**)
4. Click the OK button or press Enter ↵ . The system logs you on to the interface corresponding to your User Type.

System's Menus

The System has two menus on the menu bar – Log on/off and Tools with options as follows:

Log on/off Menu



Log-on as a different user
: Logs you off the System without closing it. Enables you to log onto the System as a different System User. When selected, the System logs you off and the logon window pops up. You need to enter a Logon Name and a Password to access the System again. Used when one person integrates on the job two System User functions (e.g. Security Manager and Administrator) and needs access to the respective System User interfaces. (Refer to "Types of Users" for more information.)

Exit
: Logs you off the System and closes it.

Tools Menu

Set Context Language

Opens the Select Language window for changing the Context Language you are currently working with. The available choices in the Select Language window are the ones entered by the Administrator in the Languages folder. The Set Context Language choice affects only the language of the Metadata for the current session. It does not affect the interface language, the data language, or the User's default language.

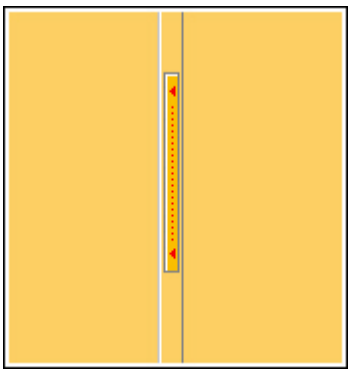
System's Screens

Left and Right Frames

The System has easy to use interface that looks like the interface of Windows® Explorer. There are two vertical frames with the left frame containing a tree-like hierarchal structure for navigation purposes and the right frame displaying content. The content displayed in the right frame depends on the current selection in the left frame. In this document, the tree-like structure in the left frame is referred to as "Navigation Tree" and the content of the right frame – as "screen".

The left frame displays an "overview" of the available screens and screen groups in the Navigation Tree using a book icon as a metaphor for a screen or a screen group. When a book is being selected, it changes its look from a "closed" to an "open" book to mark the current selection and the corresponding screen opens up in the right frame.

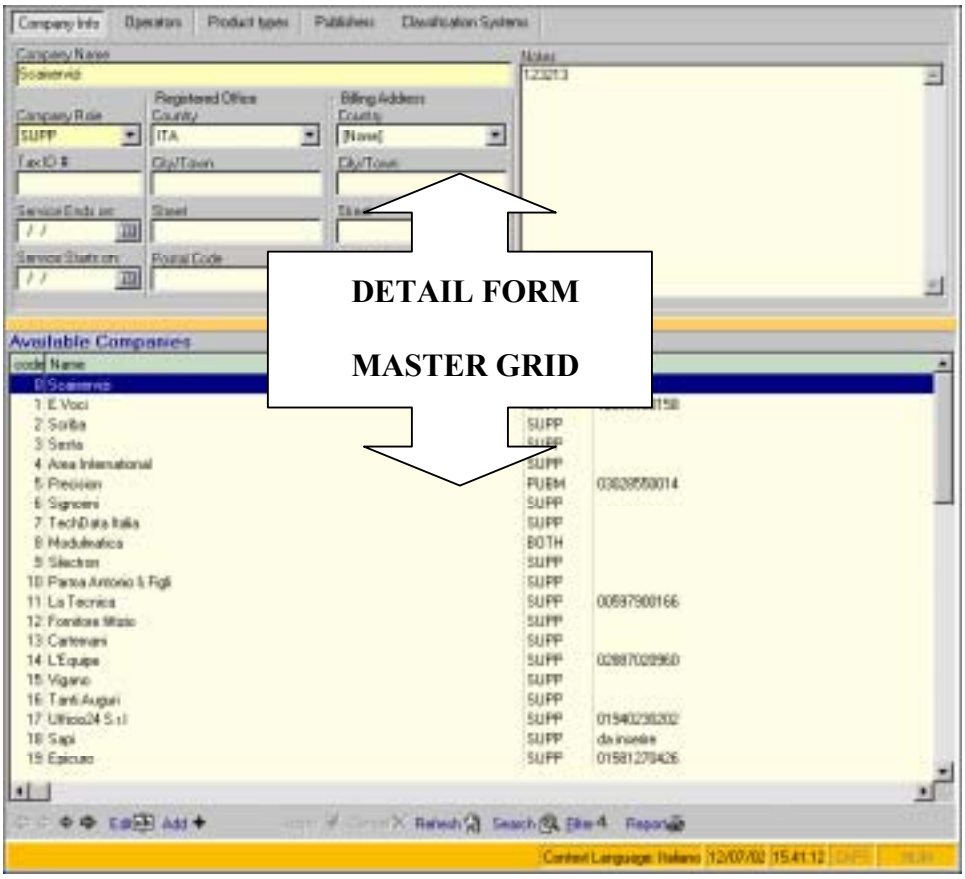
Depending on the data content displayed in the right frame, the right frame can be further divided into sub-frames. You can drag the frame separator to make a (sub-)frame smaller or larger or you can use the Frame Button (positioned in the middle of the frame separator) to maximize/restore a frame.



Forms

The screen in the right frame can be divided into sub-frames. This is done to match visualization to the structure of the data displayed on the screen. In the most common case, a screen is divided horizontally. The lower frame contains the Master Grid and the upper frame contains the Primary Detail Form and sometimes, for displaying further details, a Secondary Detail and even a Tertiary Grid/Form within the Primary Detail Form.

The first column in the grid is not a row number, but an automatically assigned ID# for the record. This ID# is unique for each record and is used by the System to identify it. An ID# cannot be reassigned to another record if a record has been deleted, so at some point they may seem not to appear in a precise ascending or descending sequence.



Interface Conventions

The following Interface Conventions are used throughout the System:

- field conventions:
  - required fields are marked with intense yellow background;

- optional fields have pale yellow background.

- button conventions:
  - Primary Detail Forms have gray buttons;
  - Secondary Detail Forms have green buttons;
  - Tertiary Detail Forms have green buttons.
- form conventions:
  - the data in a form cannot be edited until you click the or button associated with that form.
- grid conventions:
  The font color in the column by which data is sorted is:
  - blue when the column is sorted in ascending order;
  - green when the column is sorted in descending order.
- mode conventions
  - when in Edit Mode, the (or , respectively) button appears dim.
  - when in View Mode, and (or and , respectively) buttons appear dim.

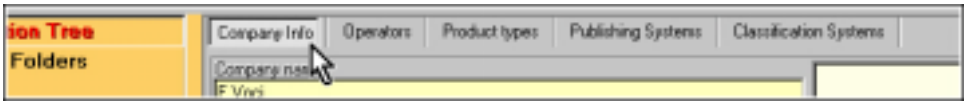
Status Bar

The System's Status Bar is located at the very bottom of the interface. The Status bar cells provide the following information (from left to right):

- User's real name as entered in the Name and Surname field of the Security Manager interface;
- the current Context Language;
- the current system date;
- the current system time;
- the current status of the Caps Lock key (displays CAPS which appears dim when the Caps Lock key is not pressed);
- the current status of the Num Lock key (displays NUM which appears dim when the Num Lock key is not pressed);

Toolbars

Navigation Bar



When selecting a Navigation Tree "book" representing a group of screens rather than a single screen, a Navigation Bar appears at the top of the screen. Each screen of the group is represented by a button with its name. Clicking a button causes the corresponding screen to appear thus making easy for you to navigate through the screens of the group.

An exception here is when the group of screens forms a step-by-step sequence (i.e. each screen is a step in the sequence), e.g. in certain export screens. In such screens the Navigation Bar contains only the steps (screens) that have been passed trough so far and you can use the Navigation Bar to move backwards but not forwards; to move forwards you need to do what the screen requires to complete the step and use the respective button within the screen.

Horizontal (Primary Detail Form) Toolbar

The Horizontal Toolbar is a standard toolbar located at the bottom of each screen that displays a Detail Form. Allows for navigating, manipulating, and visualizing of the Master Grid records.

Selects the first record in the grid.

Selects the previous record in the grid.

Selects the next record in the grid.

Selects the last record in the grid.

Allows editing of the current record. Editing always takes place in the form above it.

Adds new record.

Applies edits made to a record.

Cancels edits made to a record.

Where available, this button deletes the current record.

Refreshes the screen. Clicking this button allows you to see the latest changes made to the records in this screen by other users who work with the System at the same time as you do. You can use it also when edits made to a record doesn't seem to appear on screen.

Opens the Search popup window for searching data.

Opens the Filter popup window for performing complex searches. Depressed state of this button indicates that a filter has been applied to the grid. To see all records, you need to click and release the button.

Opens the Report Manager popup window for working with reports.

Vertical (Detail Form) Toolbar

Allows for adding/editing data in detail forms.

Adds new record to the grid to which the toolbar refers.

Deletes the current record in the grid to which the toolbar refers.

Allows editing of the current record in the grid to which the toolbar refers.

Applies edits made to the current record in the grid to which the toolbar refers.

Cancels edits made to a record.

Navigating the System

To change interface:

- From the Log on/off menu, select Log-on as a different user. Then log on as another User whose User Type provides access to the desired interface.

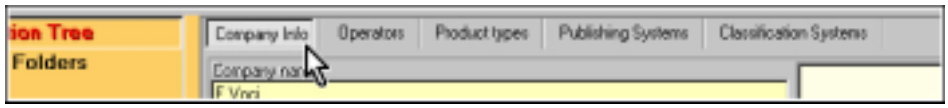
To change screen / screen group:

- From the Navigation Tree, select the desired screen / screen group. The desired screen / screen group appears in the right frame.

To change screen within a screen group:

The System provides two alternative ways to do this:

- From the Navigation Tree:
  1. From the Navigation Tree, click the + sign to the left of the desired screen group to expand it.
  2. From the expanded screen group, select the screen you want to enter. The desired screen appears in the right frame.
- From the Navigation Bar:
  - Click the button corresponding to the desired screen. (See the picture below.)



To navigate through the records in the Master Grid:

- Use the buttons on the Horizontal Toolbar to go to the first, previous, next, and last record in the grid, respectively.

To spawn another instance of the System:

- With the System already running, select the CMS shortcut in the Programs menu, then log on to the new instance with the same user name and password. Working with multiple instances is convenient when you need to switch screens from different folders in the System very often – it enables you to switch the screens from the Windows taskbar without losing any time waiting for the screen to load.

Generic Functionalities of the System

This chapter describes some functionalities that are generic to the System . This means that they are common for most of the System's screens, so, once you have understood and mastered them, you will be able to use any screen the System with ease. These functionalities include:

- working with records:
  - record management:
    - adding records;
    - updating records;
    - sorting records.
  - searching records;
  - filtering records.
- reporting:
  - working with reports
    - generating reports;
    - opening saved reports;
    - printing reports.
  - managing report templates:
    - loading templates;
    - creating templates;
    - modifying templates.
- changing your current Context Language;
- changing your User password.

Each of these is described in detail below. The specialized guides for the interface (Security Manager Guide, Administrator Guide, and Operator Guide) are written with the assumption that you have read this section and have made yourself familiar with these generic functionalities.

Record Management

Adding Records

To add a new record to the Master Grid:

1. From the Horizontal Toolbar, click

. A new blank record appears at the bottom of the grid. The new record is currently selected and highlighted in blue. The corresponding form fields are currently blank
2. Type-in the relevant information in the form fields. (Click within a field to make the blinking cursor appear if missing.)

3. From the Horizontal Toolbar, click

to confirm your edits. (You can still cancel the entire record by clicking the

button if

has not been pressed yet.)
4. If the grid fails to refresh properly, click the

button.

To add a new record to the Secondary Detail Form/Grid:

- Perform the same steps as above with the respective Vertical Toolbar buttons (instead of Horizontal Toolbar buttons).

Updating/Editing Records

To update/edit a record in the Master Grid:

1. From the Master Grid, select and highlight the record.
2. From the Horizontal Toolbar, click

.
3. Edit the relevant information in the form fields. (Click within a field to make the blinking cursor appear if missing.)
4. From the Horizontal Toolbar, click

to confirm your edits. (You can still cancel all edits made to the record by clicking the

button if

has not been pressed yet.)
5. If the grid fails refresh properly, click the

button.

To update a record in the Secondary Detail Form/Grid:

- Perform the same steps as above with the respective Vertical Toolbar buttons (instead of Horizontal Toolbar buttons).

Sorting Records

To sort the records in a grid by a certain column:

- click the column header to sort the records in ascending order;
- click the column header again to sort the records in descending order;

Deleting Records

A data record can be deleted using the

button where such option is provided.

For some types of data logical deleting is provided. With logical deletes, you do not remove the record, but change its status instead. You can delete a record logically by changing its status to *EXPIRED*. If you need to delete some type of data for which logical deleting is not provided, actual (physical) deleting can be done directly in the database. In such cases, contact your database administrator.

Searching Records

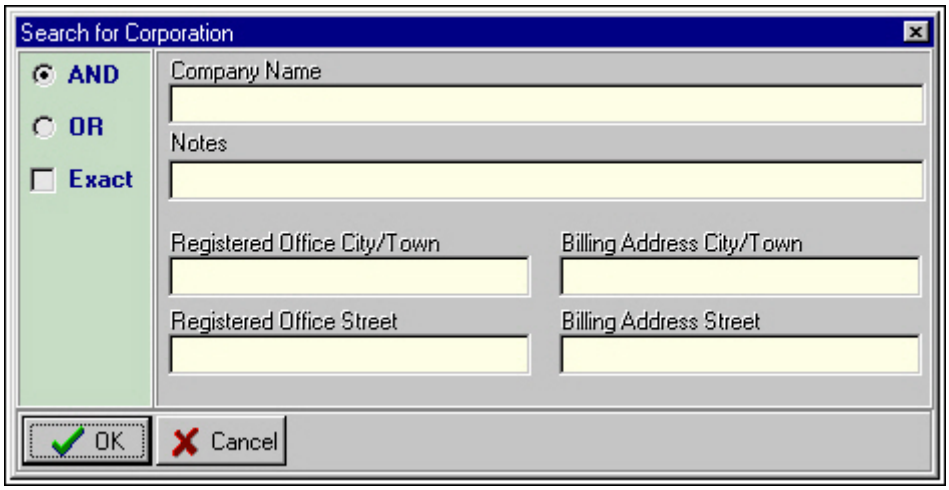
Searches are convenient when you need to locate a specific record in a Master Grid containing too many records for the manual navigation (page up /page down) to be effective.

Searches are performed from the Search pop-up window. The Search pop-up window is accessed from the

button on the Horizontal toolbar.

The Search Window

The Search window has three parts – an Options Toolbar (at the left), a Form with fields (at the right), and two Action Buttons – OK and Cancel (at the bottom). The Form contains the fields that are most likely to be used for searches for the current screen. Note that the fields in the Form are screen-specific, so they always make sense for the given context when you open the Search window. Searches are not case-sensitive.



AND/OR *radio buttons*

When searching by multiple fields, the System will return records that match all of the fields if AND has been selected and records that match at least one of the fields if OR has been selected. Applies to all fields in the Form except for the blank ones.

Exact *checkbox* When checked, matches only the whole word, if a field contains a single word, or the exact expression if a field contains more than one word. Applies to all fields in the Search Window that are not blank.

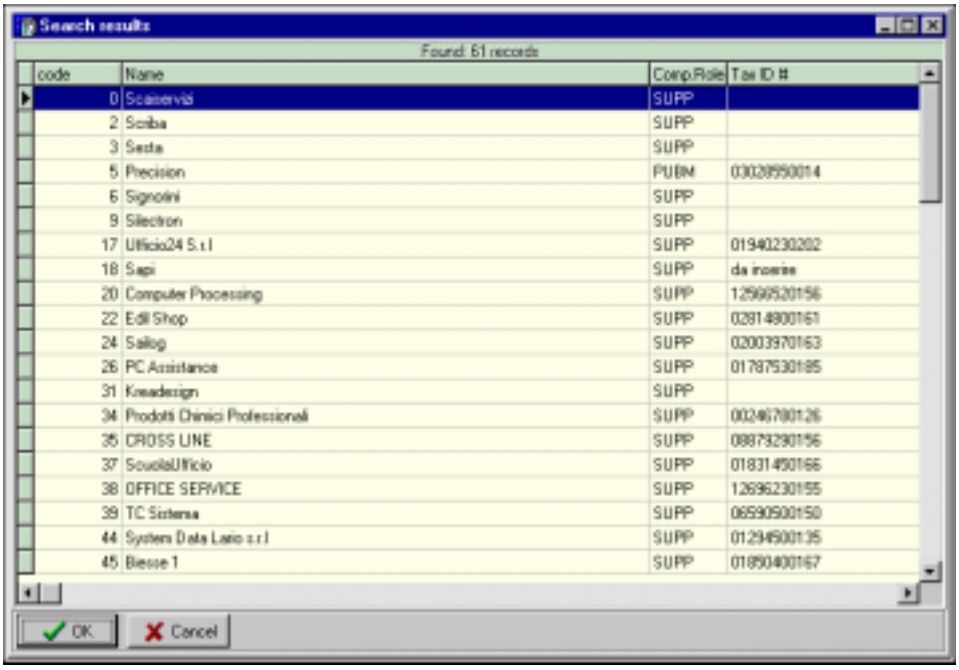
OK Performs the search and displays the Search Results grid.

Cancel Closes the Search pop-up window without performing search.

Performing a Search

To perform a search:

1. In the respective screen, click the Search button. The Search window pops up.
2. In the fields, enter the appropriate values. (You can search by one or more fields.)
3. Click OK. The found matches pop up in the Search Results grid.



4. Browse through the found matches and select the desired record.
5. Click OK. The Search Results grid closes and the desired record gets displayed in on the screen.

Note:

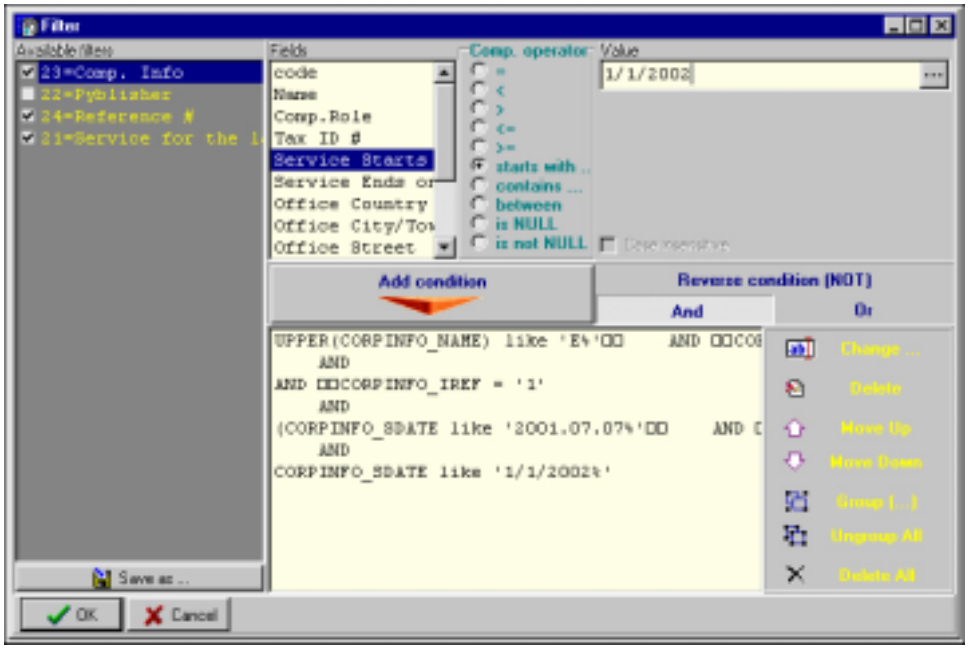
If the Search Results grid opens up blank, this means that no matching records have been found. In such cases, click the Cancel button and repeat the search adjusting your search criteria appropriately.

Filtering Records

Filtering records is useful when you need to display and work with a subset of the Master Grid records instead of all records. E.g. if you need to work only with Suppliers located in Rome, you can filter the Available Companies grid to display only these Suppliers that have Rome billing addresses.

Filters are applied from the Filter pop-up window. The Filter pop-up window is accessed from the Filter button on the Horizontal toolbar. After a filter has been applied. The filtered records are displayed in the screen's Master Grid.

The Filter Window



Two terms, specific to this screen are used in the explanations below – "Current Condition" and "Current Filter". Be sure to check them in the Glossary before reading further.

Conditions Entered *area*

This is the large field beneath the

button. Displays the Current Filter, or, to put it more precisely, displays the filtering expressions entered so far for the Current Filter. What is currently listed in this area is what will actually be applied by the System as a filter if you click the

button. You can enter pre-defined filters from the Available Filters list and/or add new conditions using the Add Condition button. You can define multiple conditions, group them, concatenate them with the OR/AND logical operators, and reverse conditions (IS NOT). The Conditions Entered area allows for selecting multiple rows by using "Ctrl + Mouse" and "Shift + Mouse" (useful when grouping conditions).

Available filters *list box*

Lists the available pre-defined filters. Check the box to the left of the filter name to enter that filter in the Conditions Entered area.

Saves the filtering expressions in the Conditions Entered as a pre-defined filter.

Fields *list box* Lists the fields available for selection in filtering expressions. The fields listed are the ones available in the Master Grid of the underlying screen. Select a field to create a new filtering expression.

Comp. Operators *radio buttons*

Lists the available comparison operator to apply to the selected field. Having selected a Field, select the appropriate comparison operator and enter a comparison value in the Value field to create a new filtering expression.

Value *field* Value part of the search expression. You can either type-in the value or, depending on the current Field type, select a value from a pre-defined list of relevant values by clicking the (ellipsis) button to the right of the Value field. Having selected a Field and a Comparison Operator, enter the comparison value in the Value field to create a new filtering expression.

Case-Sensitive *checkbox*

When checked, the System will apply the Current Condition as case-sensitive. When case is not applicable to the Current Condition (e.g. if the selected Field requires date Value), this checkbox is disabled.

Adds the Current Condition to the Conditions Entered area.

When depressed, the Current Condition will be added to the Current Filter as a reversed condition (= IS NOT). E.g. the condition "Company role is 'Supplier'" will become "Company role is NOT 'Supplier'".

When depressed, the Current Condition will be added to the previous condition in the Current Filter with the *AND* logical operator. When adding the first condition in the Conditions Entered area, this button doesn't make sense and is disabled.

When depressed, the Current Condition will be added to the previous condition in the Current Filter with the *OR* logical operator. When adding the first condition in the Conditions Entered area, this button doesn't make sense and is disabled.

Allows for editing the selected condition in the Conditions Entered area. (You can also edit a condition by double-clicking it.)

Deletes the selected condition(s) in the Conditions Entered area.

Moves the selected condition in the Conditions Entered area one position up.

Moves the selected condition in the Conditions Entered area one position down.

Groups together the selected conditions in the Conditions Entered area. Grouped conditions are indicated with parenthesis. Grouping conditions sets priority order for applying the filter conditions, i.e. for logical expressions, it is analogical to using parenthesis in algebraic expressions. For example, grouping conditions makes it possible to implement filters like this one: "List all companies that are publishers and the suppliers whose servicing has begun during the past one-year period."

Ungroups all grouped conditions in the Conditions Entered area. Works regardless of what is currently selected in the Conditions Entered area.

Deletes all conditions in the Conditions Entered area and blanks it. Works regardless of what is currently selected in the Conditions Entered area.

Applies the Current Filter and closes the Filter window.

Closes the Filter window without applying the filter.

Applying a Filter

To apply a filter to the Master Grid records:

1. In the respective screen, click the

button. The Filter window pops up.
2. In the Filter window, add a new condition or a pre-defined condition. (For information how to ad a condition, see the respective chapter below.)
3. Repeat step 2 for as many conditions as you want to enter.
4. Reposition, group, and edit the conditions in the Conditions Entered area if necessary. (Use the respective buttons at the right of the area.)
5. Click

. The Filter window closes down and the filter is applied to the Master Grid of the underlying screen. Note that the

button appears depressed. This is an indication that only the records matching the filter are visible in the grid.
6. To view all records again, click and release the

button.

Adding Conditions when Creating a Filter

Adding a New Condition

To add a new condition to the Current Filter:

1. In the Filter window, select a Field from the Fields listing.
2. From the Comp. Operator radio buttons, choose the appropriate option.
3. Enter an appropriate value in the Value field. You can either type-in the value or, depending on the Field type, select a value from a pre-defined list of relevant values by clicking the ellipsis button to the right of the Value field.

4. If the Case-Sensitive checkbox is available and appropriate, check it.
5. If you want to reverse the condition, click the Reverse Condition (NOT) button.
6. Click and depress the AND or OR button to define the logical operator with which the current condition will be added to the last condition in the Conditions Entered area. Not applicable to the first condition added to the area.
7. Click the "Add Condition" button. The condition appears as an expression in the Conditions Entered area.

Adding a Pre-Defined Filter

To add a pre-defined filter to the Current Filter:

- In the Filter window, from the Available Filters listing, check the desired pre-defined filter. The pre-defined filter appears as a condition expression in the Conditions Entered area.

Creating Pre-Defined Filters

To Create a New Pre-defined Filter:

1. In the respective screen, click the

button. The Filter window pops up.
2. In the Filter window, add a new condition or a pre-defined condition. (For information how to add a condition, see the respective chapter below.)
3. Repeat step 2 for as many conditions as you want to enter.
4. Reposition, group, and edit the conditions in the Conditions Entered area if necessary, using the respective buttons to the right of the area.
5. Click the

button to save the Current Filter as a pre-defined filter. The Filter Name dialog box pops up prompting for a name for the new filter.
6. In the Filter Name dialog box field, type-in an appropriate name for the filter and click

. The new pre-defined filter appears in the Available Filters list.

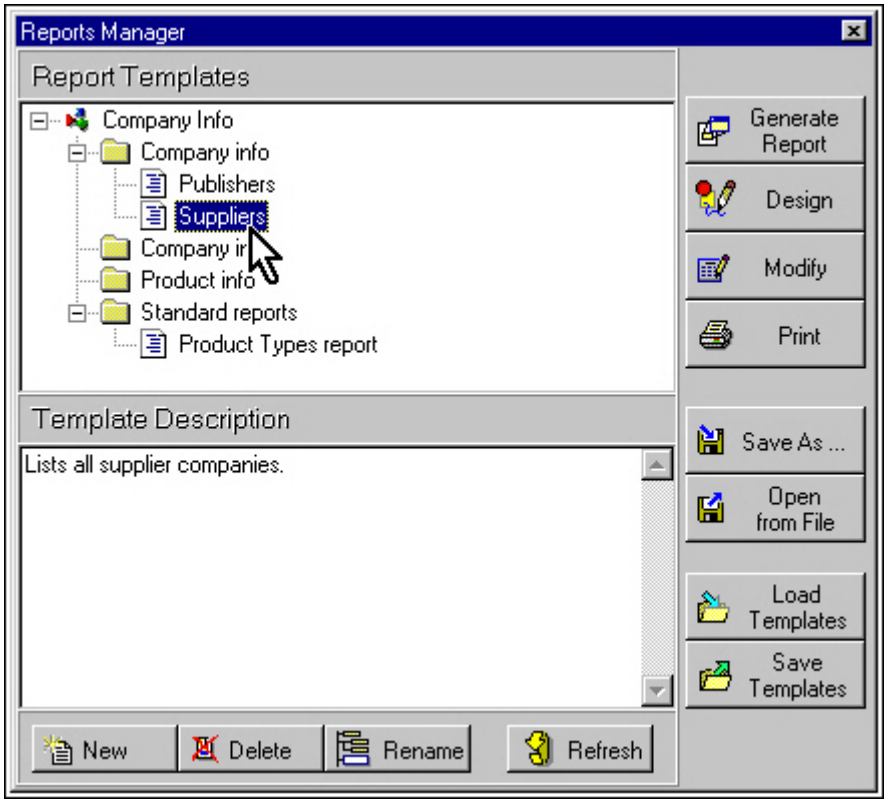
Reporting

Two terms, specific to reporting are used in the explanations below – "report template" and "report". Be sure to check them in the Glossary before reading further.

The System uses a third party reporting tool (FastReport 2.4) which provides extensive reporting and report design capabilities. This tool is fully integrated into the System and accessed either through the Report button on the Horizontal Toolbar in any screen or from the Reporting folder in the Operator interface. The report templates accessed via the Report button are always context-sensitive, i.e. they are relevant to the current screen.

As explaining a third-party tool goes beyond the scope of this document, we are limiting our explanations here to the Reports Manager window and to the procedure of generating new reports. For detailed information on creating and modifying report templates, refer to FastReport documentation.

Reports Manager Window



Report Templates *field*

Lists the available report templates grouped logically in folders.

Template Description *field*

Displays description of the currently selected template in the Report Templates field. To add/edit a template's description click the

button.

Creates new blank report template. The new template is created in the currently selected folder in the Report Templates field. Upon creation, the default name of the new report template is automatically highlighted for editing. Type-in a meaningful name for the template to replace the default name. Then click

to create the report template form.

Deletes template/folder. Applies to the currently selected item in the Report Templates field.

Allows for renaming template/folder. Applies to the currently selected item in the Report Templates field.

Refreshes the content of the Report Templates field. Click this button if the Report Templates field fails to update properly after making changes in it.

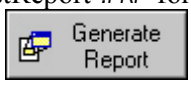
Generates report and displays it in preview. From the preview window, you are provided with options to save, print, and find text in the report. Applies to the currently selected template in the Report Templates field.

Opens report template in form design mode. Applies to the currently selected template in the Report Templates field.

Allows for adding/editing template properties. Applies to the currently selected template in the Report Templates field.

Generates and prints report without displaying it in preview first. You are provided with an option to adjust the print settings before printing the report. Applies to the currently selected template in the Report Templates field.

Generates report and saves it in an alternative file format. Applies to the currently selected template in the Report Templates field. The available alternative file formats are *.CSV, .TXT. HTM*, and *.RTF*. Use this option only if you need to transfer reports to a third party system that does not recognize the FastReport file format. For all uses with the System, save reports in the standard

FastReport *.FRP* format. (To do this, generate the report through the 

button and save it from the preview screen.)

Opens a previously saved report (in the standard FastReport .frp format).

Loads a previously created set of report templates. This option is designed for importing pre-defined templates into the System at System's initial setup.

Saves the current report templates together with their folders as a pre-defined set of report templates. Use this option for system backup purposes and for transferring the current report templates to another installation of the System.

Generating Reports

To generate a report:

1. In the respective screen, click the

button to open the Reports Manager window.
2. In the Reports Manager window, from the Report Template field, select the desired report template.
3. Click

. A small window pops up, informing you about the progress of the report generation process. Once the report is ready, it gets displayed in report Preview window.
4. Using the buttons on the report Preview window you can:
   - print the report;
   - save the report (in FastReport format (*.FRP*));
   - find text in the report.

Changing Your System User Password

To change your User password:

1. From the Log on/off menu, select Log-on as a different user. The Log on window. pops up.
2. In the Log on window, type in your Logon Name and Password as usual.

3. Click Change Password. The Log on window expands, displaying fields for the new password.

4. In the New Password and Confirm Password fields, type-in your new password. (**case-sensitive!**)
5. Click Change. (Do not click the OK button; do not press Enter ↵ . If you do so, **your password will not change**.) The system logs you in with your new password.

All explanations in the Security Manager Guide refer to Security Manager's interface. When explaining form fields (under the DETAIL FORM caption), fields are listed in navigation order (the order in which you navigate through the form when pressing the Tab key).

User Accounts Folder

What Is It for?

In order to be able to access the System, each user must have a User Account created first. User accounts are created and managed from the User Accounts folder and its corresponding screen – User Info. From there, the Security Manager manages the accounts of all users of the System – Administrators and Operators.

A Security Manager can register unlimited number of Administrators and Operators, as well as other Security Managers. When creating a new User Account, the Security Manager selects a User Type for the Account. The User Type determines which one of the three user interfaces (Security Manager's, Administrator's; or Operator's) the User will be able to access.

Warning:

The User Accounts folder maintains information that might subject to privacy and/or security regulations.

What Can You Do in User Accounts Folder?

From the User Accounts folder you:

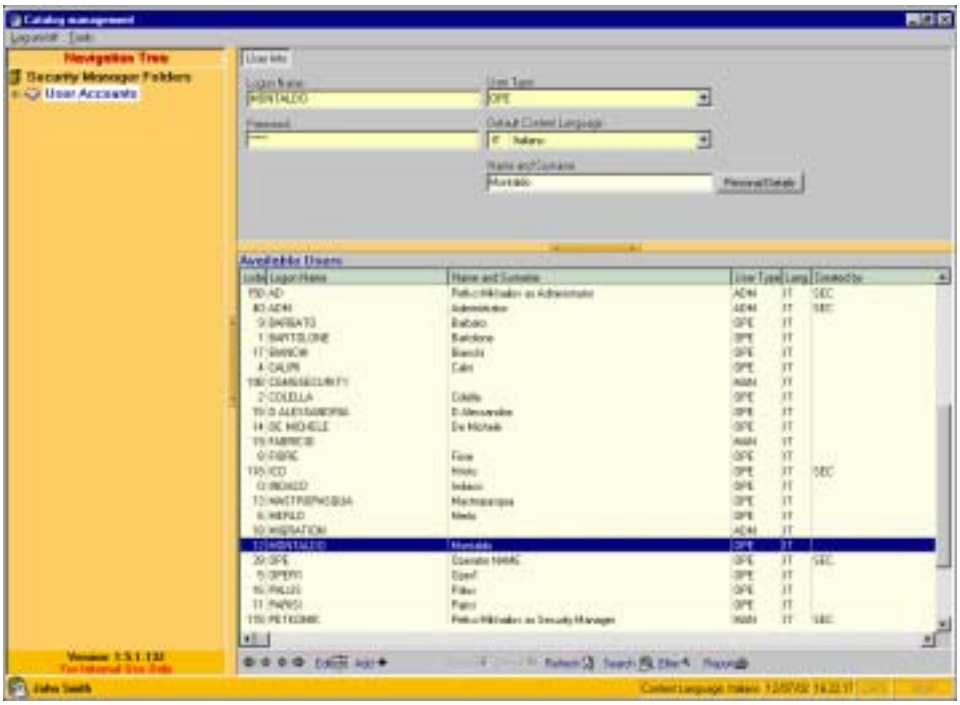
- create new User Accounts (=Users);

- delete User Accounts;
- assign User Types to Users;
- change Users' passwords;
- set up the default Context Language for each User;
- maintain Users' personal data;
- generate Reports about Users;
- modify the templates for these Reports.

How To Access User Accounts Folder?

When you log on to the System with your Security Manager's login name and password, you enter the User Accounts folder automatically and the User Info screen displays in the right frame.

The User Info Screen



MASTER GRID

Available Users *grid*

Lists the available User records. User records contain the available System Users with their Login Names, User Types, and default System Languages. The Created By column lets you know which one Security Manager has created the User. The

information in the Created By column is stored automatically by the System upon creation of a User Account.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Users grid.

Logon Name *field* *

Logon name for the currently highlighted User Account. The logon name is not case-sensitive and can be up to 32 characters long.

User Type *combo* *

Type of the currently highlighted User's Account. The available types are Security Manager, Administrator, and Operator, listed as *MAN*, *ADM*, *OPE*, respectively. The User Type selection determines which one of the three System interfaces the User is going to access when logging onto the System. For more information on system users, refer to "Types of Users".

Password *field* *

User logon password. The password is CASE-SENSITIVE and can be up to 10 characters long. When the password is being created/edited, a password confirmation field called Confirm Password appears right beneath the Password field. (The Confirm Password field appears on the first keystroke in the Password field when in Add New/Edit mode.) The Confirm Password field is required when creating/changing a password.

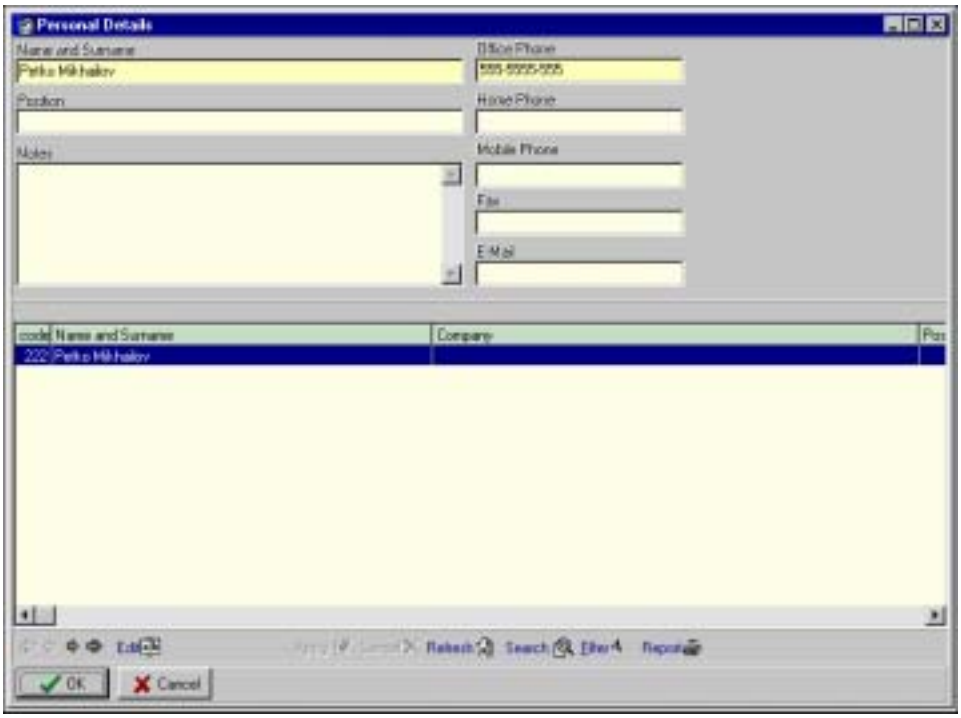
Default Context Language *combo* *

The default Context Language for the User. This is the language the System will use for Metadata when the User logs on. The available Language choices are defined by the Administrator from the Languages folder of the Administrator interface.

Name and Surname *field*

The real name of the person using the account, e.g. `John Smith`. Input in this field is allowed only from the Personal Details window (Click the Personal Details button to the right of the field to open that window.).

Personal Details Window



Name and Surname *field* *

Real name of the person using the account, e.g. `John Smith`. The entry in this field will appear in the Name and Surname field of the User Info screen.

Position *field*

Position of the person using the account, e.g. `supervisor.`

Office Phone *field* *

Work telephone number of the person using the account, e.g. `555. 551. 7789`. Be sure to use same input format for all entries.

Home Phone *field*

Home telephone number of the person using the account, e.g. `555. 523. 4467`. Be sure to use same input format for all entries.

Mobile Phone *field*

Cell phone number of the person using the account. Be sure to use same input format for all entries.

Fax *field* Fax number of the person using the account, e.g. `555. 551. 7780`. Be sure to use same input format for all entries.

E-Mail *field* E-mail address of the person using the account, e.g. `jsmith@B2Biscom.com`.

Notes *field* Additional information about the contact in free-form text.

window grid Lists in grid form the same information as the fields above.

All explanations in the Administrator Guide refer to Administrator's interface. When explaining form fields (under the DETAIL FORM caption), fields are listed in navigation order (the order in which you navigate through the form when pressing the Tab key).

Languages Folder

What Is It for?

The Languages folder is used for declaring Languages. Declaring a Language makes that Language available to the System and allows for entering context and data information in that language.

The declared languages get listed as options to choose from in the Language combo boxes throughout the interface where language selection is needed.

What Can You Do in Languages Folder?

In Languages folder you can:

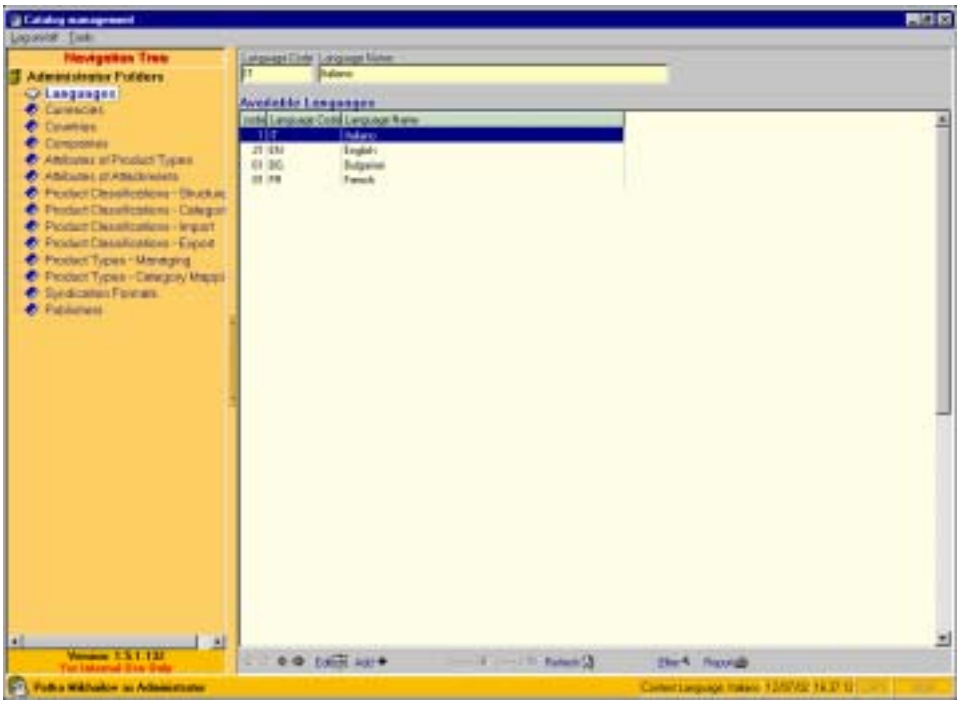
- declare and manage the Context and Data Languages;
- generate reports about Languages;
- create and modify templates for these reports.

How To Access Languages Folder?

To access Languages folder:

- From the Navigation Tree, select "Languages". The Languages screen displays in the right frame.

The Languages Screen



MASTER GRID

Available Languages *grid*

Lists the available Language records.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Languages grid.

Language Code *field* *

Two-letter international code for the language. Can be the same as the Country Code (see "The Country Screen" chapter).

Language Name *field* *

Name of the language.

Currencies Folder

What Is It for?

The Currencies folder is used for declaring currencies. Once declared, a Currency becomes available to the System. The available currencies are needed in Publishers folder for assigning to Publishers and in Syndication folder, Operator interface, as a syndication parameter.

What Can You Do in Currencies Folder?

In the Currencies folder you can:

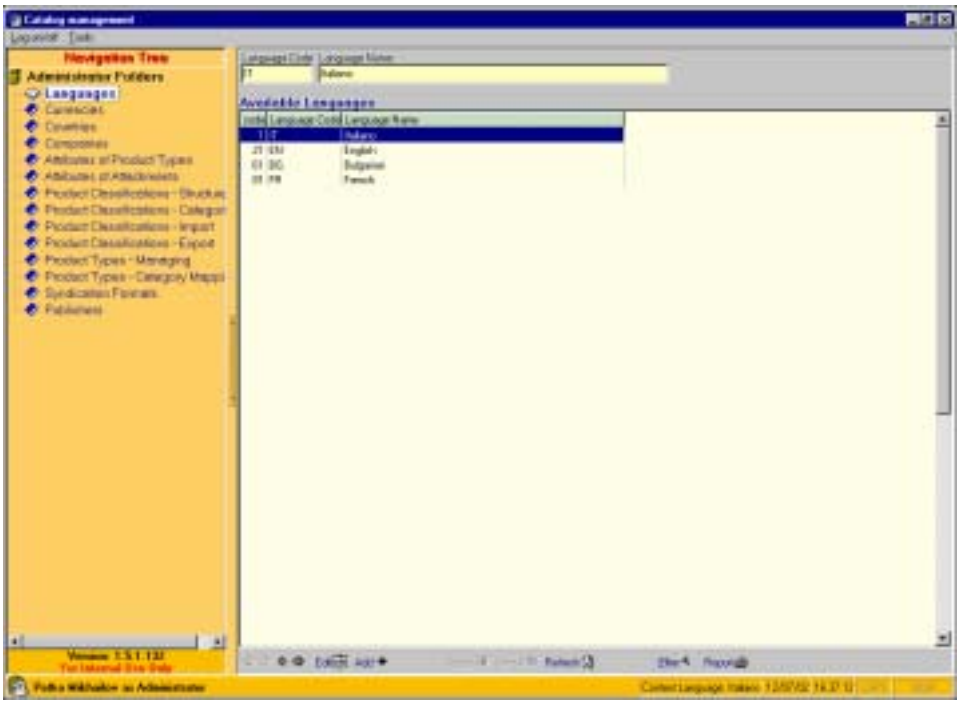
- declare and manage available Currencies;
- generate reports about Currencies;
- create and modify templates for these reports.

How To Access Currencies Folder?

To access Currencies folder:

- From the Navigation Tree, select "Currencies". The Currencies screen displays in the right frame.

The Currencies Screen



MASTER GRID

Available Currencies *grid* *

Lists the available Currency records.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Currencies grid.

Currency Code *field* *

Three-letter international code for the currency.

Currency Name *field* *

Name of the currency.

Countries Folder

What Is It for?

The Countries folder is used for declaring countries. Declaring a Country makes that Country available to the System. Countries are needed as a part of Companies' office and billing addresses (in Companies folder). The declared countries get listed as options to choose from in the Country combo boxes, Company Info window.

What Can You Do in Countries Folder?

In the Countries folder you can:

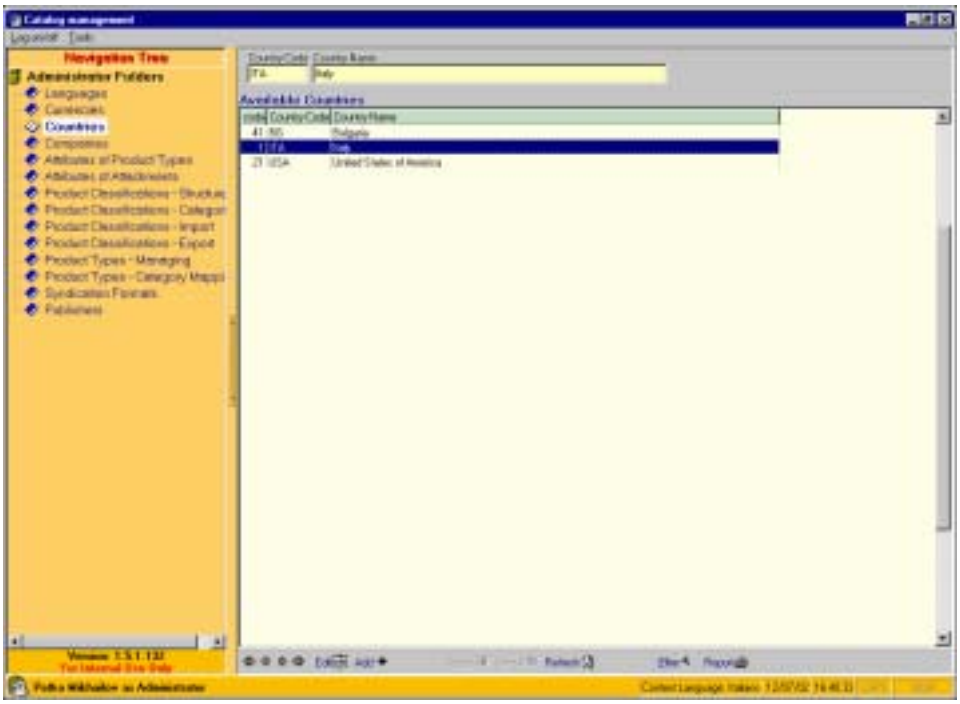
- declare and manage the available Countries;
- generate reports about countries;
- create and modify templates for these reports.

How To Access Countries Folder?

To access Countries folder:

- From the Navigation Tree, select "Countries". The Countries screen displays in the right frame.

The Countries Screen



MASTER GRID

Available Countries *grid*

Lists the available Country records.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Countries grid.

Country Code *field* *

Two-letter international code for the country.

Country Name *field* *

Name of the country.

Companies Folder

What Is It for?

The Companies folder contains several screens related to managing the companies participating in the Catalog Management System. All types of companies – supplier companies, publisher companies, and mixed-type companies – are managed from here.

What Can You Do in Companies Folder?

In Companies folder you can:

- add companies and update company information;
- assign Company Roles to Companies;
- manage Companies' office and billing addresses;
- manage service periods (start/end dates) for Companies;
- assign Operators to Companies;
- assign Product Types to Companies;
- assign product Classification Systems to Companies;
- assign Publishers to Companies;
- add free-form notes about Companies;
- generate reports about Companies;
- create and modify templates for these reports.

How To Access Companies Folder?

To access Companies folder:

- From the Navigation Tree, select the Companies folder. The first screen in the folder – Company Info – displays in the right frame.

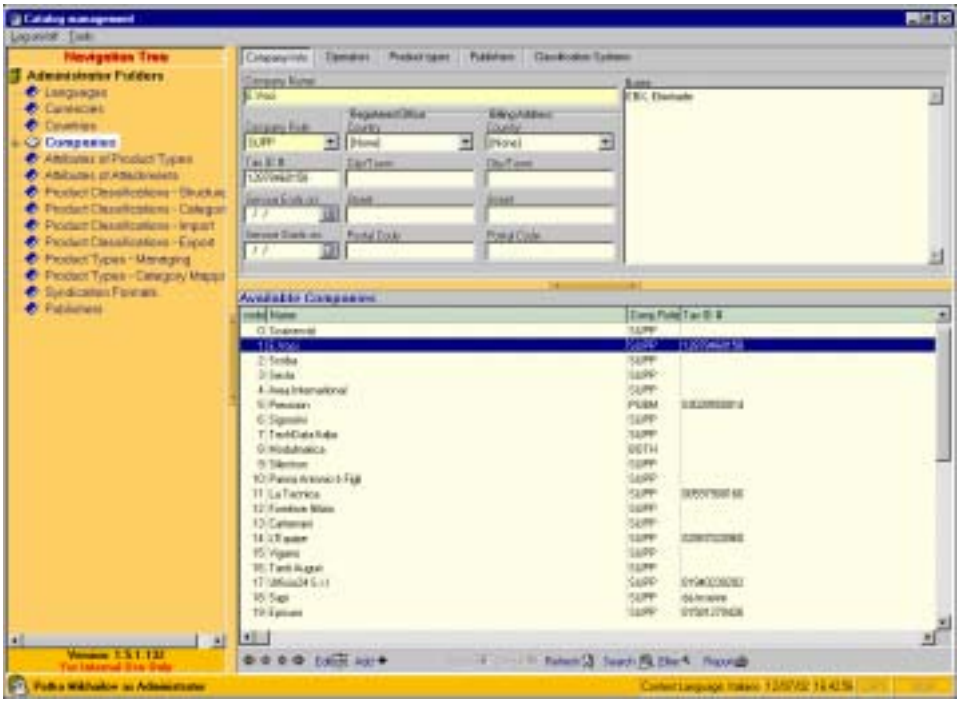
Companies Folder Screens

MASTER GRID

Available Companies *grid*

Lists the available Company records. The columns in the grid are equivalent to the fields in Company Info screen.

Company Info Screen



DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Companies grid.

Company Name *field* *

Name of the company.

Company Role *combo* *

Role of company the from catalog management perspective – whether the company is a recipient or provider of publishing services. The available options are *SUPP* (for "supplier", i.e. recipient company that supplies goods for selling through publishing services), *PUBM* (for "publishing manager", i.e. publishing services provider), and *BOTH* (for companies that provide both goods for selling and publishing services).

Tax ID *field*

The tax ID number of the company or another appropriate unique identification number. The format and the name of this number can vary from country to country: in US, for example, it is called “EIN” (“Employer Identification Number”).

Service Ends on *date field*

Ending date of the catalog management service provided for the company. Type-in the date in dd/MM/yy format (e.g. `01/08/02` for Aug. 1, 2002) or click the calendar button (15) to the right of the field to select a date from the pop-up calendar.

Service Starts on date *field*
: Starting date of the catalog management service provided for the company. Type-in the date in dd/MM/yy format (e.g. `01/08/02` for Aug. 1, 2002) or click the calendar button ( ) to the right of the field to select a date from the pop-up calendar.

Registered Office *frame*

Country *combo*
: Country name as a part of the company's registered office address. The available country choices are the ones entered in the Countries folder.

City/Town *field*
: City/town of the company's registered office address.

Street *field*
: Street with street number, building number/name, suite number, etc. of the company's registered office address.

Postal Code *field*
: Postal code for the address of the company's registered office.

Billing Address *frame*

Country *combo*
: Country name as a part of the company's billing address. The available country choices are the ones entered in the Countries folder.

City/Town *field*
: City/town of the company's billing address.

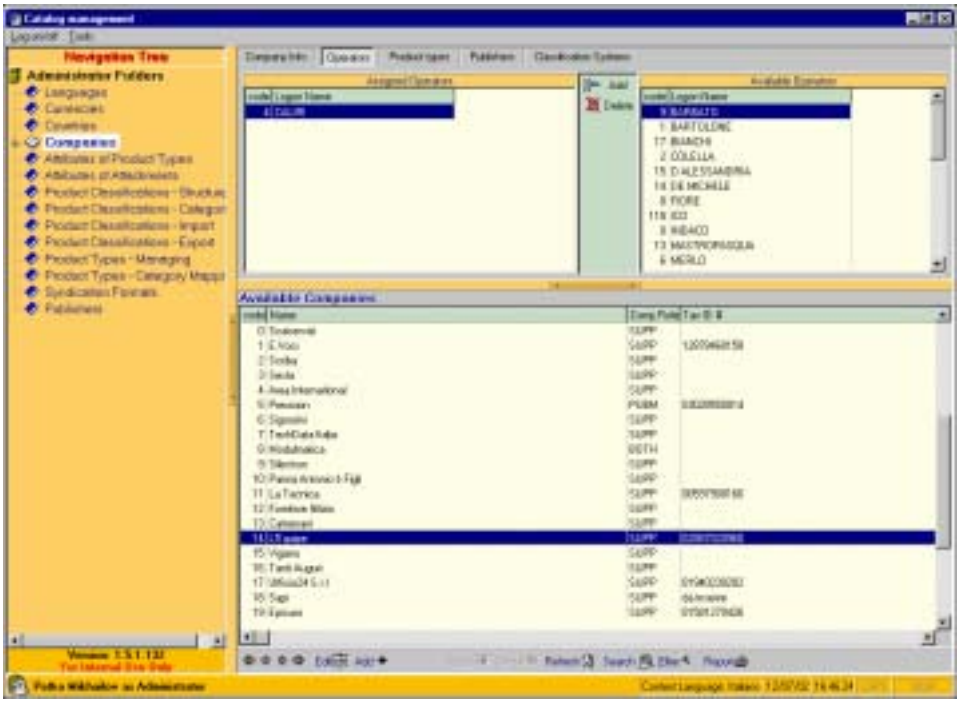
Street *field*
: Street with street number, building number/name, suite number, etc. of the company's billing address.

Postal Code *field*
: Postal code for the company's billing address.

Notes *field*
: Field for free-form notes about the company.

Logo *field*
: Field for displaying the company logo. Double-clicking the field pops up the Open dialog for loading the logo image file.

Operators Screen



DETAILS FORM

Data displayed in the form refer to the currently selected record in the Available Companies grid.

Assigned Operators *grid*

Lists the Operators assigned to the company. Assigning an Operator to a Company makes this Company available to the Operator.

Vertical Toolbar

Used for assigning Operators and cancelling Operators' assignments.

Assigns Operators to company. The Operator to be assigned is the currently selected one in the Available Operators grid (i.e. moves the selected Operator from the Available Operators grid to the Assigned Operators grid.).

Cancels Operator's assignment. The Operator to be cancelled is the one currently selected in the Assigned Operators grid (i.e. moves the selected Operator back from the Assigned Operators grid to the Available Operators grid.)

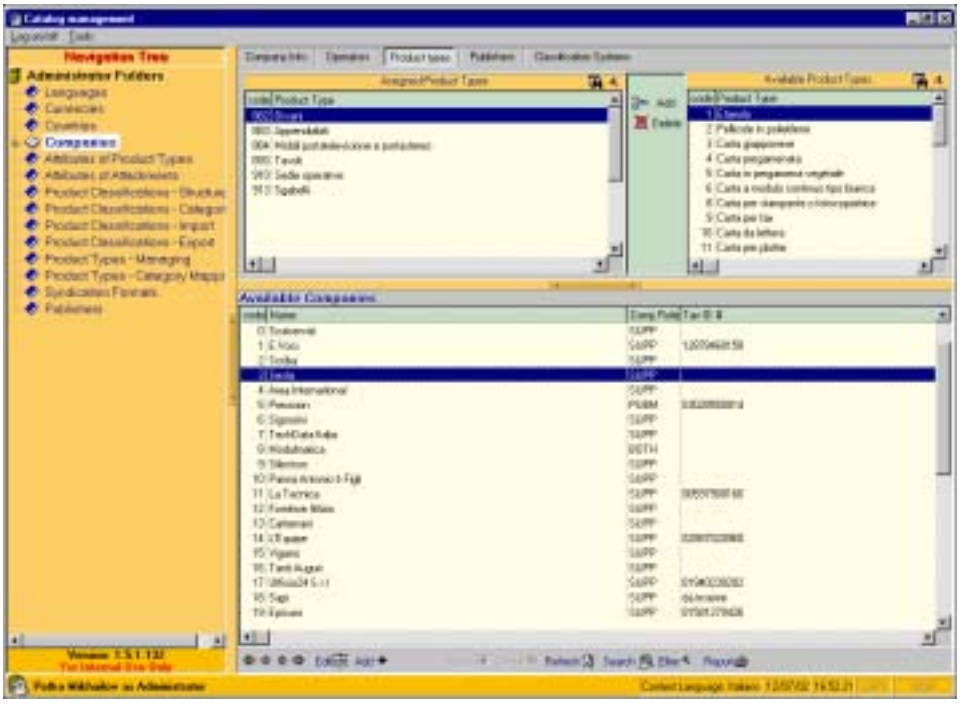
Available Operators *grid*

Lists the Operators that are available for assigning.
(Available Operators = all Operators minus Assigned Operators)
An Operator can be assigned to more than one Company.

Note:

To get a User listed in Available Operators as an Operator, that User must be registered in the System as Operator beforehand. This is handled from the Security Manager's interface.

Product Types Screen



FORM

Data displayed in the form refer to the currently selected record in the Available Companies grid.

Assigned Product Types *grid*

Lists the Product Types assigned to the company. Assigning a Product Type to a Company makes this Product Type available to the Operator for Product import (Products – Prepare Excel Template folder, Operator interface), Product management (Products – Managing folder, Operator interface), and Syndication (Syndication folder, Operator interface).

Vertical Toolbar

Used for assigning Product Types and removing assigned Product Types.

Assigns Product Types to the company. The Product Type to be assigned is the one currently selected in the Available Product Types grid. When a Product Type that has already been assigned is selected, the button is disabled and appears dim.

Removes an assigned Product Type. (i.e. removes the currently selected Product Type in the Assigned Product Types grid.) Product Types that have Products assigned to them for the current Company, cannot be deleted.

Available Product Types *grid*

Lists all Product Types available for selection. The listed Product Types are the ones entered in the Product Types – Managing folder.

search grid button

Opens the Search for Product Types window for searching through the Product Type records in the grid.

filter grid button

Opens the Filter pop-up window for filtering the Product Type records in the grid. When, after applying the filter, you want to display all records anew, **open the Filter window again an click the** **button.**

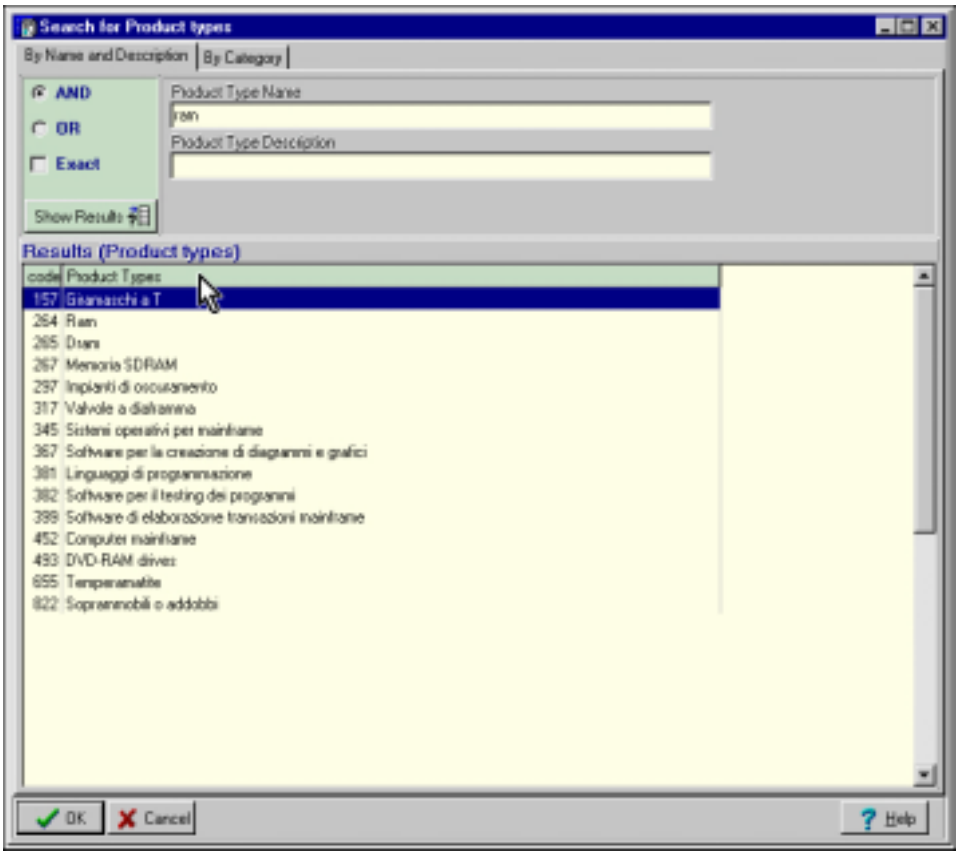
Search for Product Types Window

The Search for Product Types window is accessed through the buttons at the right-hand sides of the Product Types grids headers (Assigned Product Types grid and Available Product Types grid).

The Search for Product Types window is the System's standard Search window but with some additional functionalities specific to Product Types. These product-type-specific functionalities are described below. (If you need information about the standard search functionalities, refer to "Searching Records" in the 'Introduction and Overview' section of this document.)

The Search for Product Types window has two tabs – each of them enabling you to search in a specific way – By Name and Description tab and By Category tab.

By Name and Description tab



Allows for searching for Product Type by Name and/or Description.

Show Results

Performs the search and displays the matches found in the Results (Product Types) grid. **Do not use the OK button to perform the search**

Results (Product Types) *grid*

Displays the matches found ready for selection.

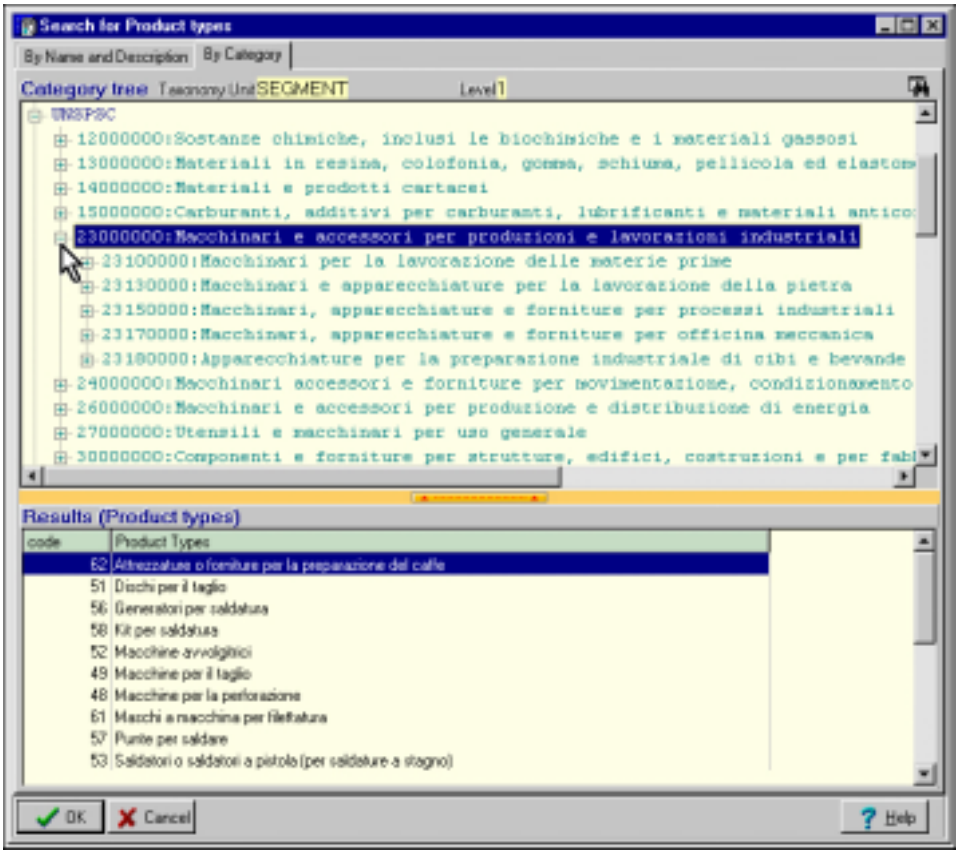
Searching in By Name and Description tab

To find a Product Type using the By Name and Description tab:

1. In the By Name and Description tab enter your search criteria as you do with any standard search. (For more information on standard searching, refer to "Searching Records" chapter.)
2. Click Show Results. The matches found get displayed in the Results (Product Types) grid.
3. In the Results (Product Types) grid, select the desired Product Type.

4. Click OK. The desired Product Type gets displayed in the Search Results pop-up grid.
5. Click OK. The Search Results pop-up grid closes and the desired Product Type gets located and highlighted in the underlying grid.

By Category tab



Allows for both navigation and keyword Product Type searching within a selected Classification System. The Product Types that can be found in a specific Classification System are the ones that have been mapped to it from the Product Types – Category Mapping folder.

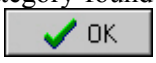
Category Tree *field*

Displays the available Product Classifications in a tree-like view. The available Product Classifications are the ones that have been entered in the Product Classification – Structure folder. Click the + sign at the left-hand side of the desired classification/branch to select and expand it. When a branch is selected, the Product Types assigned to that branch get listed in the Results (Product Types) grid.

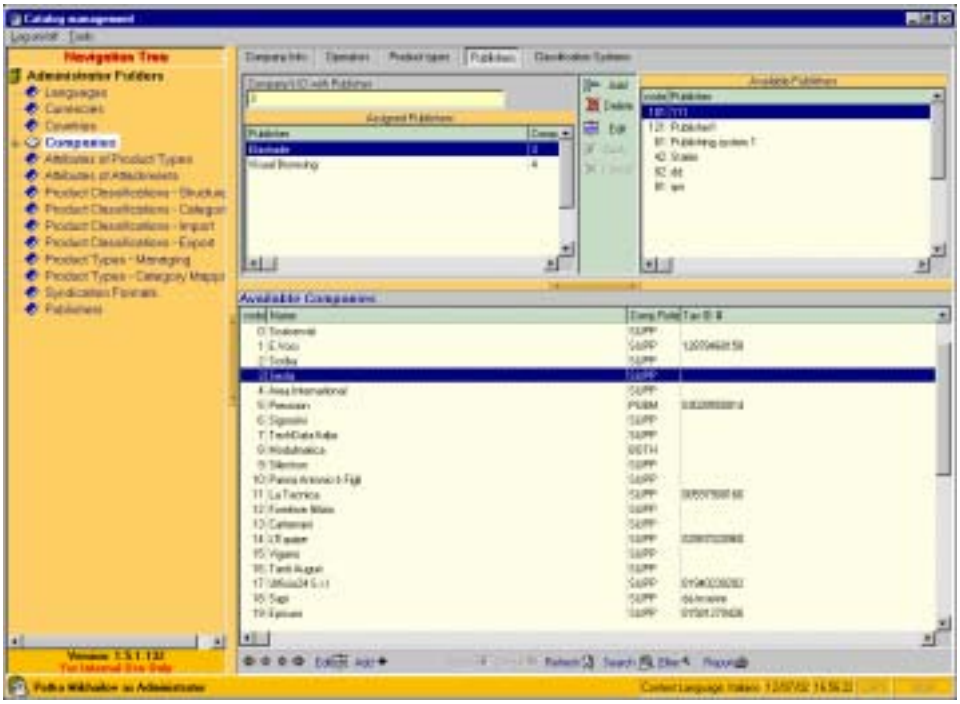
Results (Product Types) *grid*

Displays the Product Types assigned to the currently selected branch in the Category Tree field. Click the desired Product Type to select it.

grid header button

Searches and locates a category within the current classification in the Category Tree field. (For this search, it doesn't matter exactly which level and branch of the classification is selected as the search is always performed within the entire classification; the only requirement is that **the selection should be placed within the desired classification** (if there is more than one classification)). Useful for large classifications (like UNSPSC) that have too many categories to be browsed and found manually by scrolling. When clicked, the Search for Category window pops-up. In the Search for Category window, you are provided with options to search by Category Code and/or Category Name, as well as to limit the search to a certain level of the classification. The category found is displayed in a new Search Results grid. Click  and the category will be located and highlighted in the Category Tree field.

Publishers Screen



DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Companies grid.

Assigned Publishers *grid*

Lists the Publishers assigned to the company. Assigning a Publisher to a Company makes this Publisher available to the Company for Syndication (Syndication folder, Operator interface).

Company's ID with Publisher *field* *

Publisher-assigned identifier (ID number, code, etc.) for the company. The provider supplies the identifier and requires it when publishing data.

Vertical Toolbar

Used for assigning and removing publishers to the current company.

Assigns Publishers to the company. The Publisher to be added is the currently selected one in the Available Publishers grid (i.e. moves the selected Publisher from the Available Publishers grid to the Assigned Publishers grid.)

Removes Publishers from the company. The Publisher to be removed is the currently selected one in the Assigned Publishers grid (i.e. moves the selected Publisher back from the Assigned Publishers grid to the Available Publishers grid.)

Allows for editing in the Company's ID with Publisher field.

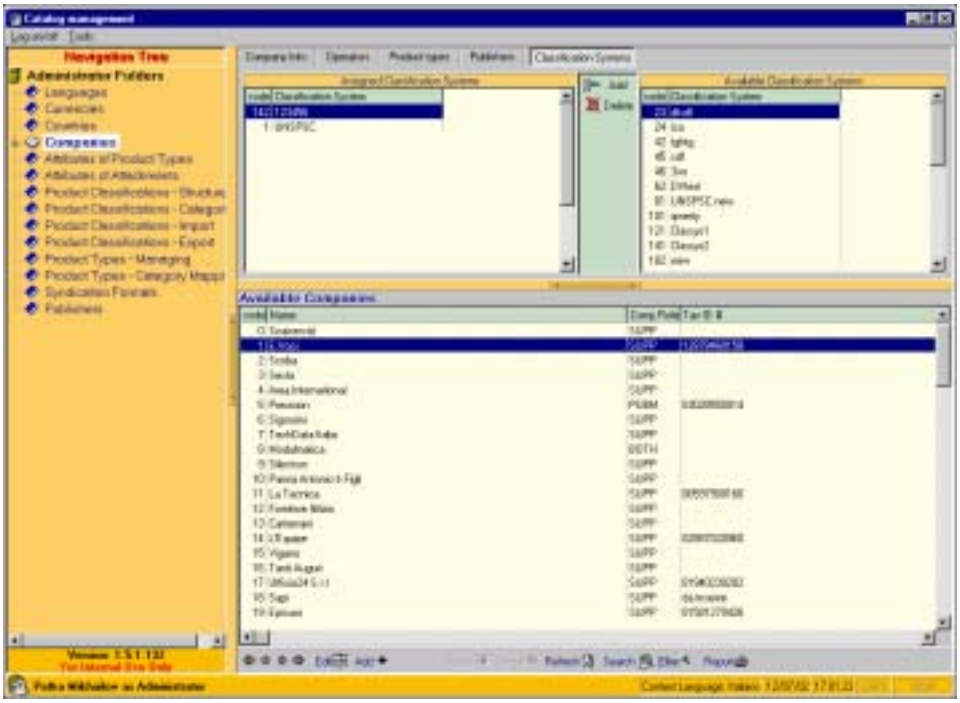
Applies edits made to the Company's ID with Publisher field.

Cancels edits made to the Company's ID with Publisher field.

Available Publishers *grid*

Lists the Publishers that are available for assigning.
(Available Publishers = all Publishers minus Assigned Publishers)
(all Publishers = all Publishers defined in Publishers folder (for all Publishing Service Providers))

Classification Systems Screen



DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Companies grid.

Assigned Classification Systems *grid*

Lists the Classification Systems assigned to the company. Assigning a Classification System to a Company makes that Classification System available to the Company for Syndication (Syndication folder, Operator interface). More than one Classification System can be assigned to a Company.

Vertical Toolbar

Used for assigning Classification Systems and removing assigned Classification Systems.

Assigns Classification Systems to the Company. The Classification System to be assigned is the currently selected one in the Available Classification Systems grid (i.e. moves the selected Classification System from the Available Classification Systems grid to the Assigned Classification Systems grid.)

Removes an assigned Classification System from the company. The Classification System to be removed is the one currently selected in the Assigned Classification Systems grid (i.e. moves the selected Classification System back from the Assigned Classification Systems grid to the Available Classification Systems grid.)

Available Classification Systems *grid*

Lists the Classification Systems that are available for assigning.
(Available Classification Systems = all Classification Systems minus Assigned Classification Systems)
(all Classification Systems = Classification Systems declared in Product Classifications folder)

Attributes of Product Types Folder

What Is It for?

The Attributes of Product Types Folder is used for declaring and managing Product Types Attributes and their properties.

What Can You Do in Attributes of Product Types Folder?

In the Attributes of Product Types folder you can:

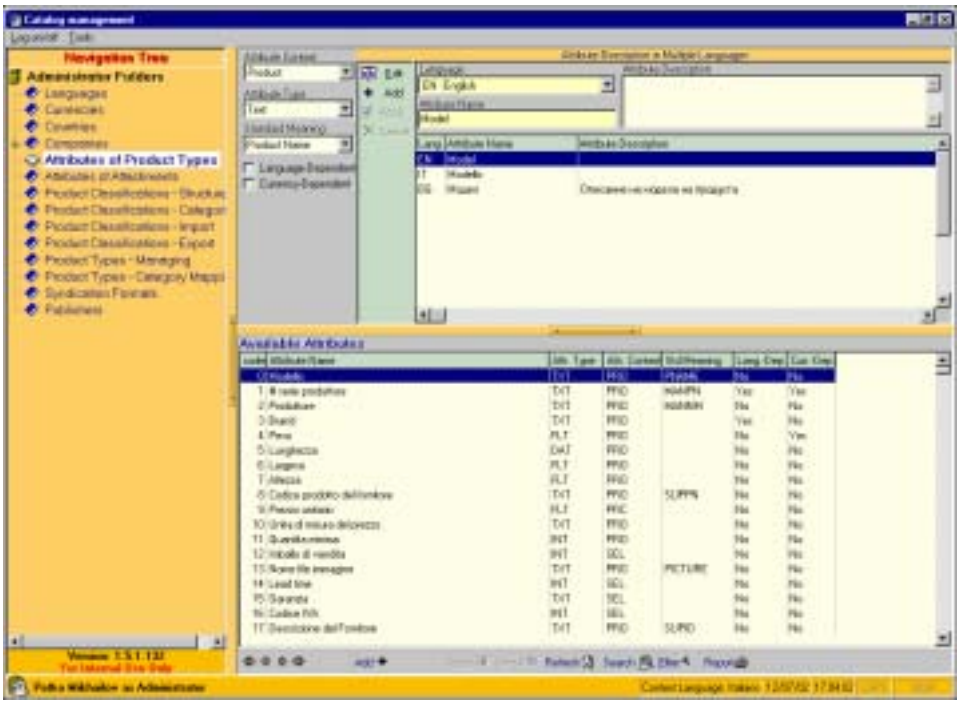
- create Product Type Attributes;
- declare Product Type Attributes in multiple languages;
- edit/update Product Type Attributes;
- map Product Type Attributes to Standard Meanings;
- generate reports about Product Type Attributes;
- create and modify templates for these reports.

How To Access Attributes of Product Types Folder?

To access Attributes of Product Types folder:

- From the Navigation Tree, select the Attributes of Products folder. The Attributes of Products screen displays in the right frame.

The Attributes of Product Types Screen



MASTER GRID

Available Attributes *grid*

Lists the available Product Type Attributes with their properties. Listing a Product Type Attribute here makes it available for use in Record formats (Syndication Formats folder) and to the Operator for Product import (Products – Prepare Excel Template folder, Operator interface) and Product management (Products – Managing, Operator interface).

PRIMARY DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Attributes grid.

Attribute Context *combo*

Attribute Context for the Attribute. The available choices are *PRODUCT* and *SPECIFIC*. Select *PRODUCT* if the Attribute is a Product Attribute (i.e. all Product Types have it), else select *SPECIFIC*.

Attribute Type *combo*

Data format for the Attribute. The available choices are *NUMERIC – INTEGER*, *NUMERIC – DECIMAL*, *TEXT*, *DATE*, *YES/NO*.

Standard Meaning *combo*

Standard Meaning to which the current Attribute is mapped.

Language-Dependent *checkbox*

When checked, indicates that data points entered for the current attribute are language-dependent, i.e. each data point has separate and different content versions for each language. E.g. an Attribute named "Model Description" should be language-dependent as there has to be a description of the model in every Language in use, while an Attribute named "Minimal Quantity" should not be, as a minimal quantity requirement wouldn't vary with language selection.

Currency-Dependent *checkbox*

When checked, indicates that the data points entered for the current attribute are currency-dependent, e. g. price.

ATTRIBUTE DESCRIPTION IN MULTIPLE LANGUAGES SECONDARY DETAIL FORM AND GRID

Data displayed in this form refer to the currently selected record in the Attribute Description in Multiple Languages grid.

Attribute Description in Multiple Languages *grid*

This is the grid above the Available Attributes grid. Lists the current Attribute in all Languages in which the Attribute has been defined.

Vertical Toolbar

Manages the Attribute Description in Multiple Languages grid records.

Language *combo* *

Language for the currently selected record in the Attribute Description in Multiple Languages grid. The available language choices are the ones defined in the Languages folder.

Attribute Name *field*

Name for the Attribute in the currently selected Language. Refers to the currently selected Language grid record.

Attribute Description *field*

Description of the attribute in the currently selected Language. Refers to the currently selected Language grid record.

Attributes of Attachments Folder

What Is It for?

The Attributes of Attachments Folder is used for declaring attributes for file attachments (Attachment Attributes) and assigning file types to them. Declaring Attachment Attributes makes them available to the Operator for managing Attachment Lists (Attachments – Managing folder) and for importing attachments.

What Can You Do in Attributes of Attachments Folder?

In Attributes of Attachments Folder you can:

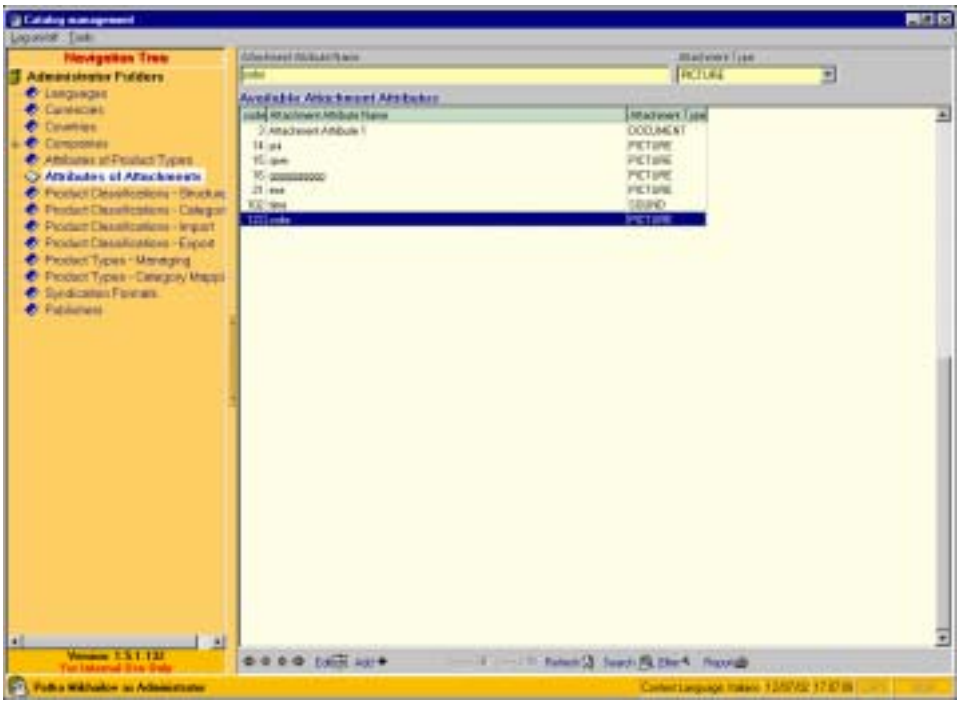
- Declare new Attachment Attributes and assign Attachment Types to them;
- Edit/Update Attachment Attributes;
- generate reports about Attachment Attributes;
- create and modify templates for these reports.

How To Access Attributes of Attachments Folder?

To access Attributes of Attachments folder:

- From the Navigation Tree, select the Attributes of Attachments folder. The Attributes of Attachments screen displays in the right frame.

The Attributes of Attachments Screen



MASTER GRID

Available Attributes *grid* *

Lists the available attachment attributes.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Attributes grid.

Attachment Attribute Name *field* *

Name of the Attachment Attribute.

Attachment Type *combo*

File type of the Attachment Attribute. The available options are *DOCUMENT*, *PICTURE*, *SOUND*, *MOVIE*.

Product Classifications – Structure Folder

What Is It for?

The Product Classification – Structure folder is used for defining Product Classifications by level depths and level names. Defining a product classification is the first step to do when creating a Classification. The next step is creating/importing the Classification's categories (in Products Classifications – Categories and/or Products Classifications – Importing folders, respectively).

Product Classifications are used for structured searching (i.e. for searching by navigating through logically organized categories at multiple depth levels) for Product Types and Products. The former is done from Company Info folder, Product Types screen and the latter – from Syndication folder, Operator interface. For more information about structured searching, refer to "Search for Product Types" chapter, the 'By Category Tab' part.

What Can You Do in Product Classifications – Structure Folder?

In Product Classifications – Structure you can:

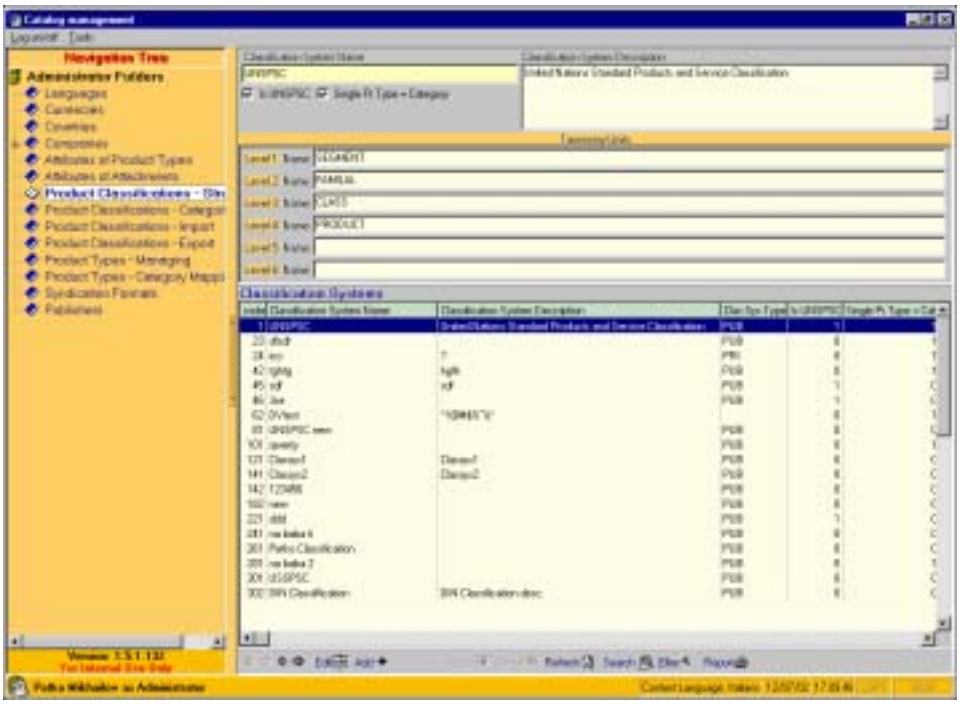
- define Product Classification Systems by taxonomy unit (level);
- edit/update product classification systems
- generate reports about Product Classifications;
- create and modify templates for these reports.

How To Access Product Classifications – Structure Folder?

To access Product Classifications – Structure folder:

- From the Navigation Tree, select the Product Classifications – Structure folder. The Product Classifications – Structure screen – displays in the right frame.

The Product Classifications – Structure Screen



MASTER GRID

Classification Systems *grid*

Lists the available Classification Systems.

DETAIL FORM

Data displayed in the form refer to the currently selected Classification System record in the Classification Systems grid.

Classification System Name *field* *

Name or acronym for the Classification System, e.g. UNSPSC.

Classification System Description *field*

Full name or description of the Classification System, e.g. Universal Standard Products and Services Classification.

Is UNSPSC *checkbox*

When checked, indicates that the classification is (part of) the UNSPSC. Useful when you work with UNSPSC, but do not need the entire classification. In such cases you can enter in the System only that part of UNSPSC with which you actually work and mark this box checked.

Single Product Type = Category *checkbox*

When checked, indicates that every Product Type can be mapped to only one Classification Category, i.e. there will be only one-to-one Product-Type-to-Category mapping.

Level 1-6 *fields* *

Names of the respective levels in the current classification. Only levels for which names have been entered exist in the Classification. You can define up to six levels. Only Level 1 is required.

Product Classifications – Categories Folder

What Is It for?

The Product Classifications – Categories folder is used for managing Product Classifications.

What Can You Do in Product Classifications – Categories Folder?

In Product Classifications – Categories folder you can:

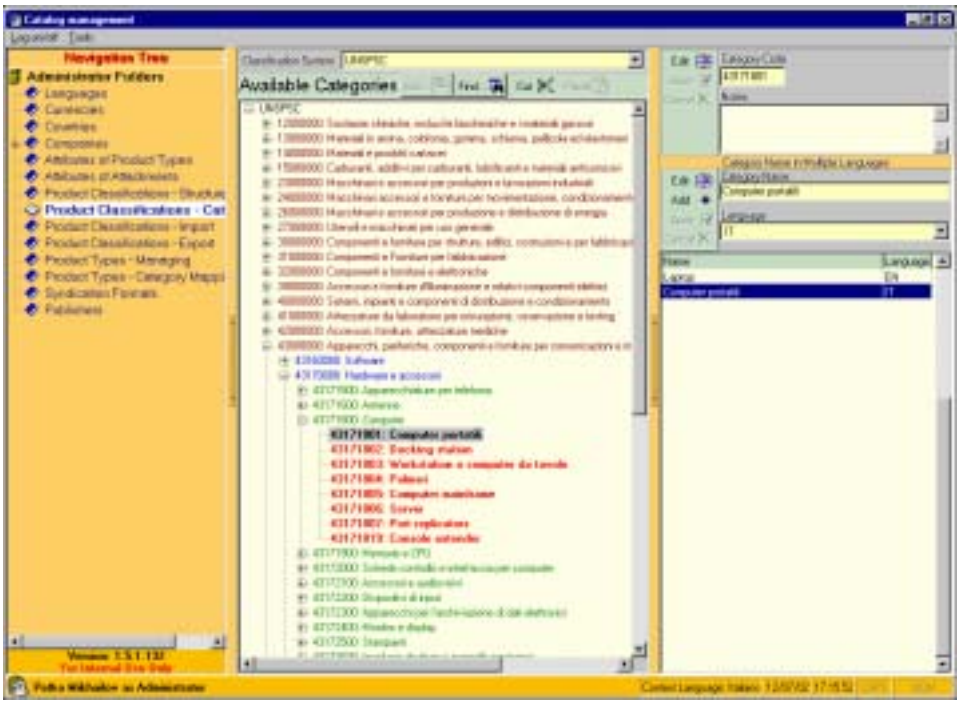
- add new categories to a Classification;
- move categories within a Classification;
- edit/update categories' codes and names;
- maintain categories' names in multiple languages;
- add free-form notes to categories.

How To Access Product Classifications – Categories Folder?

To access the Product Classifications – Categories folder, then display a Classification and select a category:

1. From the Navigation Tree, select the Product Classifications – Categories folder. The Product Classifications – Categories screen displays in the right frame.
2. From the Classification System combo box, select the desired Classification. The selected Classification appears in the large Available Categories field in a tree-like view.
3. From the Classification tree, locate and select the desired category or add a new category and select it. The form splits vertically and a detail sub-form appears at the right providing additional details for the selected category.

The Product Classifications – Categories Screen



The content in the screen refers to the current selection in the Classification System combo box.

Classification System *combo box*

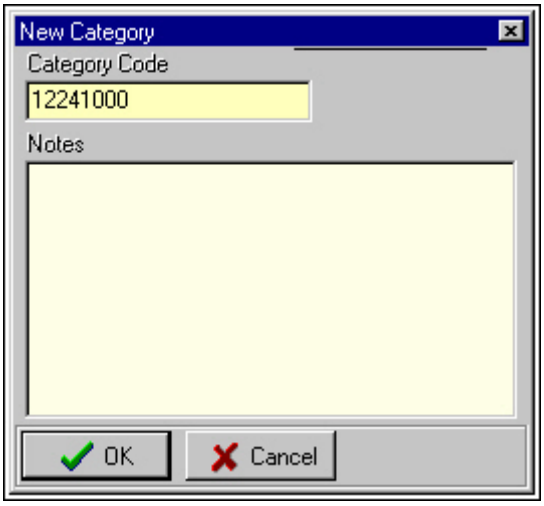
Displays the current Classification System. The listed Classification Systems are the ones defined in the Product Classification – Structure folder. The selected Classification System appears in the Available Categories field in tree-like view.

PRIMARY DETAIL FORM

Available Categories *field*

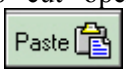
Displays the current Classification by categories in tree-like view. Each level in the tree-like view has its distinctive font color; the lowest level font color is **bold red**. The Available Categories field displays only one Classification at a time – the one that is currently selected in the Classification System combo box. Unless you have a category selected, the rest of the form is not visible.

Adds a new child category under the currently selected category. When clicked, the New Category window pops up, requesting a Category Code for the new category:



Type-in the appropriate Category Code. (By default, the Category Code field displays the code of the parent category, so make sure you change it appropriately). You can also add free-form explanatory text in the Notes field.

Opens the Search for Category window for locating a Category within the current Classification. You can search by Category Name, Category Level, and/or by Category Code. Useful for large classifications that are too big to be searched manually by scrolling. For more information on searching for category, refer to the "Search for Product Types Window" chapter, the 'By Category' part.

Performs "cut" operation on the selected category. Used together with the 

button when you need to move a category to another location in the Classification System tree.

After using the

button, pastes the category at the current selection as a child category.

SECONDARY DETAIL FORM

Category Code *field* *

Code for the selected Category.

Notes *field* Field for free-form explanatory text about the category.

Upper Vertical Toolbar

Manages the Category Code and the Notes fields.

TERTIARY DETAIL FORM

(CATEGORY NAME IN MULTIPLE LANGUAGES)

Manages the name of the current category in multiple languages.

grid Lists the Category Name in all languages in which the Category Name has been defined. The currently selected record in the grid displays in the Category Name and the Language fields.

Category Name *field* *
Name of the category in the language that is currently selected in the Language combo box.

Language *combo box* *
Language for the currently selected record in the Category Name in Multiple Languages grid. The available languages are the ones defined in the Languages folder.

Lower Vertical Toolbar
Adds new Category Name for the current category in any of the available Languages; edits the existing Category names.

Product Classifications – Import Folder

What Is It for?

The Product Classifications – Import folder enables you to import Product Classifications from a previously prepared Flat File (normally prepared using the System (in Product Classifications – Export folder)). You can import entire Classifications or only parts of them, depending on the content of the Flat File. Importing partial classifications can also be used for follow-up incremental imports once your base classification is in place. A Flat File can contain no more than one Classification.

What Can You Do in Product Classifications – Import Folder?

In Product Classifications – Import folder you can:

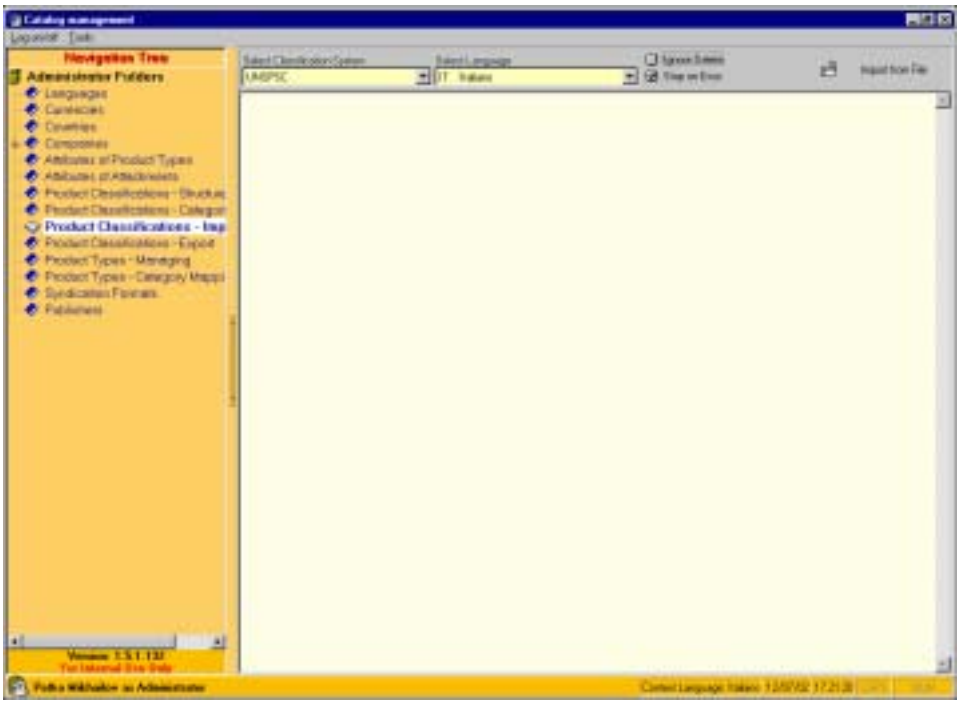
- import entire or partial Classifications from a Flat File.

How To Access Product Classifications – Import Folder?

To access Product Classifications – Import folder:

- From the Navigation Tree, select the Product Classifications – Import folder. The Product Classifications – Import screen displays in the right frame.

The Product Classifications – Import Screen



Select Classification System *combo box* *

The Classification System into which categories will be imported. The available Classification Systems are the ones defined in the Product Classifications – Structure folder.

Language *combo box* *

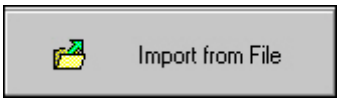
Language version of the Classification System to be imported. Select the respective language or leave the *CURRENT* option if appropriate (*CURRENT* imports the classification in your current Context Language). The available languages are the ones defined in the Languages folder.

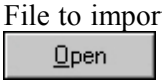
Ignore Delete *checkbox*

When checked, the System will ignore the delete codes in the Flat File when performing the import. The delete codes are designed for updating categories. Checking the Ignore Delete checkbox prevents accidental deletion of categories but may result in duplicated categories.

Stop on Error *checkbox*

When checked, the import will stop automatically if an error occurs.



Opens the Import Excel File dialog for selecting an MS Excel File to import from. Browse and select the desired file and click 

button to perform the import.

Product Classifications – Export Folder

What Is It for?

The Product Classifications – Export folder enables you to export Product Classifications. You can export entire Classifications or only parts of them, depending on your needs. You can export only one Classification at a time.

What Can You Do in Product Classifications – Export Folder?

In Product Classifications – Export folder you can:

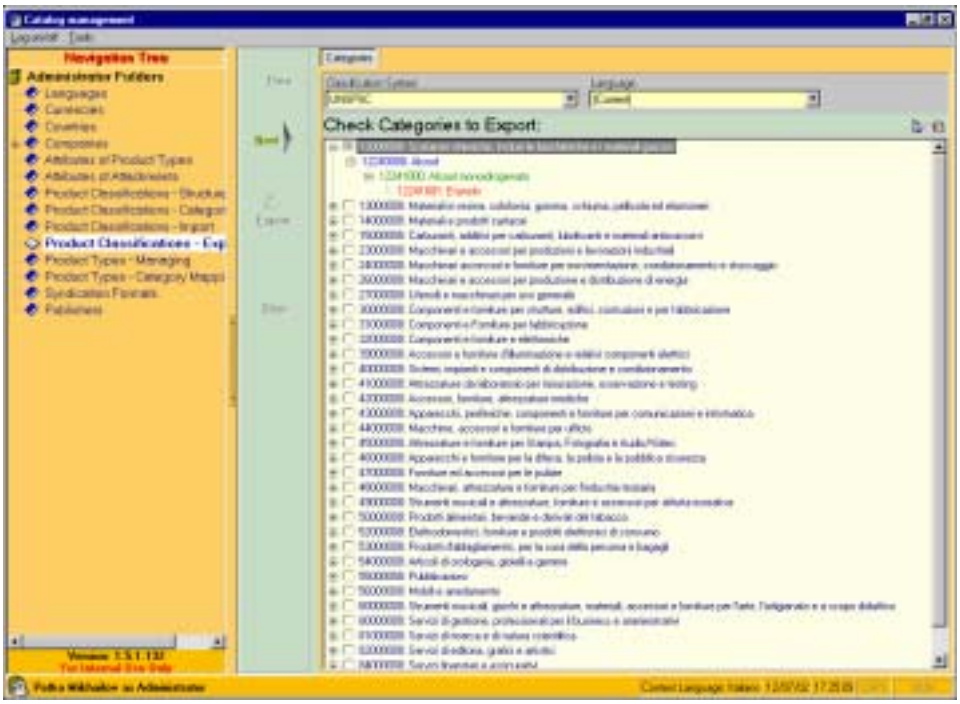
- export Classifications in Flat File format
- export Classifications
  - in their entirety or
  - partially (export only pre-selected branches).

How To Access Product Classifications – Export Folder?

To access Product Classifications – Export folder:

- From the Navigation Tree, select the Product Classifications – Export folder. The Product Classifications – Export screen displays in the right frame.

The Product Classifications – Export Screen



Classification System *combo box* *

Lists the available Classification Systems for selection. The listed Classification Systems are the ones defined in the Product Classifications – Structure folder. The Classification System to be exported is the currently selected one. It appears in tree-like view in the Available Categories field.

Check Categories To Export *field* *

Displays the current Classification by categories in tree-like view. The top-level categories have checkboxes for selection at the left of their names; check the branches you want to export. (Checked branches will be exported in their entirety, i.e. each top-level category will be exported with all its child branches)

Language *combo box* *

Language version of the currently selected Classification System. Select the respective language or leave the *CURRENT* option if appropriate (*CURRENT* exports the classification in your current Context Language). The available languages are the ones defined in the Languages folder.

grid button Checks all branches in the current Classification.

grid button Clears all checked branches in the current Classification.

Vertical Toolbar

Manages the export process.

Applies the options selected in the current screen and takes you to the next step of the process.

Takes you back to the previous step of the process.

Performs the export.

Stops and cancels an export process that is under way.

Product Types – Managing Folder

What Is It for?

The Product Types – Managing Folder is used for declaring and managing Product Types.

What Can You Do in Product Types – Managing Folder?

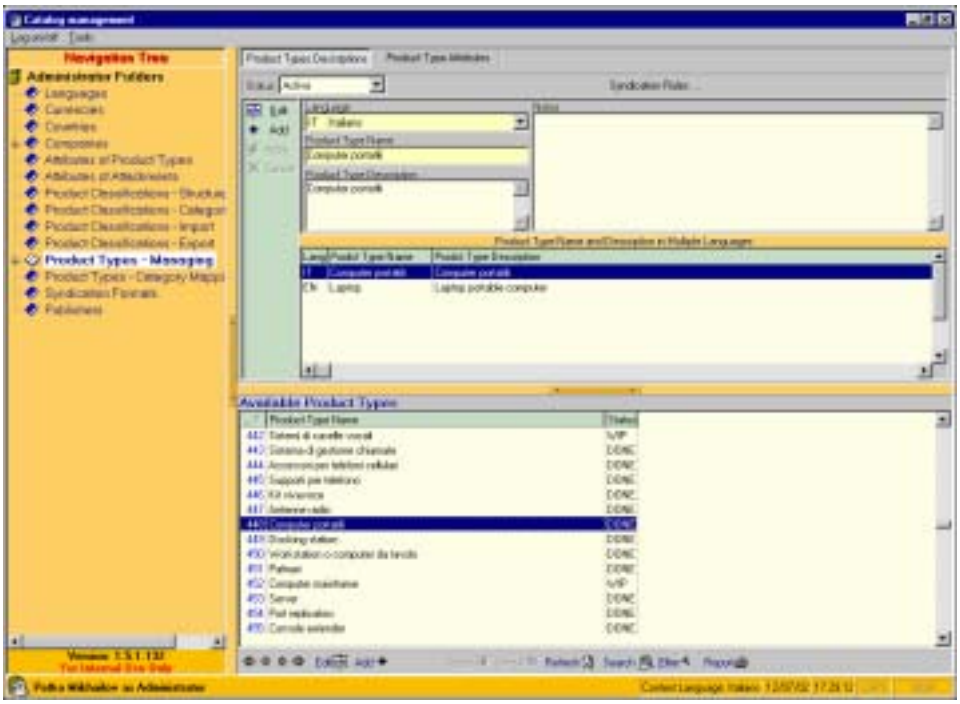
In the Product Types – Managing Folder you can:

- declare Product Types;
- assign attributes to Product Types;
- define Derived Fields' content for each Product Type;
- change Product Types status;
- generate reports about Product Types;
- create and modify templates for these reports.

How To Access Product Types – Managing Folder?

From the Navigation Tree, select the Product Types – Managing folder. The first screen in the folder – Product Types Descriptions – displays in the right frame.

The Product Types Descriptions Screen



MASTER GRID

Available Product Types *grid*

Lists the available Product Types.

DETAIL FORM

Data displayed in the form refer to the current currently selected record in the Available Product Types grid.

Status *combo* * Status of the current Product Type. The available options are *ACTIVE* and *WORK IN PROGRESS*. The *ACTIVE* status (appears as *DONE* in the grid) makes the Product Type available for use in the System.

Syndication Rules ...

Opens the Syndication Rules pop-up window for managing the Derived Fields for the current Product Type. This button is enabled in Edit mode. (Click Edit to enable it.)

SECONDARY FORM/GRID

(PRODUCT TYPE NAME AND DESCRIPTION IN MULTIPLE LANGUAGES)

Data displayed in the form refer to the currently selected record in the Product Type Name and Description in Multiple Languages grid.

Product Type Name and Description in Multiple Languages *grid*

This is the grid above the Available Product Types grid. Lists the current Product Type in all languages in which the current Product Type has been defined.

Vertical Toolbar

Manages the records in the Product Type Name and Description in Multiple Languages grid.

Language *combo* *

Language for the currently selected record in the Product Type Name and Description in Multiple Languages grid. The available language choices are the ones defined in the Languages folder.

Product Type Name *field*

Name for the Product Type in the currently selected Language. Refers to the currently selected record in Product Type Name and Description in Multiple Languages grid.

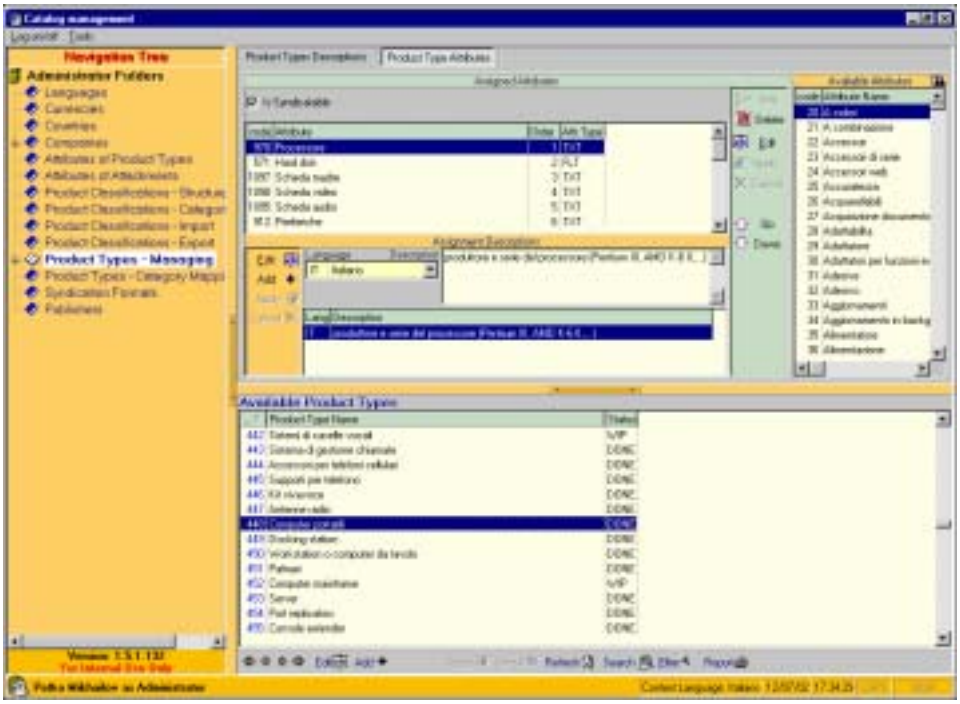
Product Type Description *field*

Description of the Product Type in the currently selected Language. Refers to the currently selected record in Product Type Name and Description in Multiple Languages grid.

Note *field*

Field for free-form text notes about the Product Type in the currently selected Language.

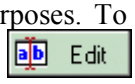
Product Types Attributes Screen



ASSIGNED ATTRIBUTES DETAIL FORM/GRID

Data displayed in the form refer to the current Product Type currently selected record in the Available Product Types grid.

Product Type Attributes *grid*
: Lists the Specific Attributes assigned to the current Product Type.

Is Syndicatable *checkbox*
: Refers to the currently selected record in the Assigned Attributes grid. When checked, the Attribute can be used for Syndication, else it is only for reference and reporting purposes. To enable changing the status of this checkbox, click the 

button no the green vertical toolbar.

AVAILABLE ATTRIBUTES SECONDARY DETAIL GRID

Available Attributes *grid*
: Lists the available Specific Attributes for selecting and assigning to the current Product Type.

grid button
: Opens the Search for Attribute Description window for locating an Attribute in the Available Attributes grid.

Green Vertical Toolbar
: Manages the Attribute assigning process (see the buttons below). Also, allows for arranging the assigned Attributes in a particular order (useful when preparing Product export template (Operator interface) or when you just prefer to list the assigned attributes in a particular order, e.g. in the Syndication Rules window).

: Assigns Attribute. The Attribute to be assigned is the currently selected one in the Available Attributes grid.

: Removes assigned Attribute. The Attribute to be removed is the currently selected one in the Assigned Attributes grid.

: Enables changing the status of the Is Syndicatable checkbox.

: Moves the selected Assigned Attribute one position up.

: Moves the selected Assigned Attribute one position down.

ASSIGNMENT DESCRIPTION TERTIARY FORM

Data displayed in the Assignment Descriptions form refer to the currently selected record in the Assigned Attributes grid.

Allows for adding Assignment Descriptions in multiple languages. Assignment Descriptions are descriptions that refer to the assignments of Attributes to Product Types. E.g. when the *HARD DISK CAPACITY* Attribute is assigned to the *LAPTOP* Product Type, this particular assignment can have

its own Assignment Description. Assignment Descriptions are unique for each 'Attribute – Product Type' combination. Each Assignment Description can have language-specific versions in any available Language.

Language *combo* *

Language for the current Assignment Description. Refers to the currently selected record in the Assignment Descriptions grid. The available language choices are the ones defined in the Languages folder.

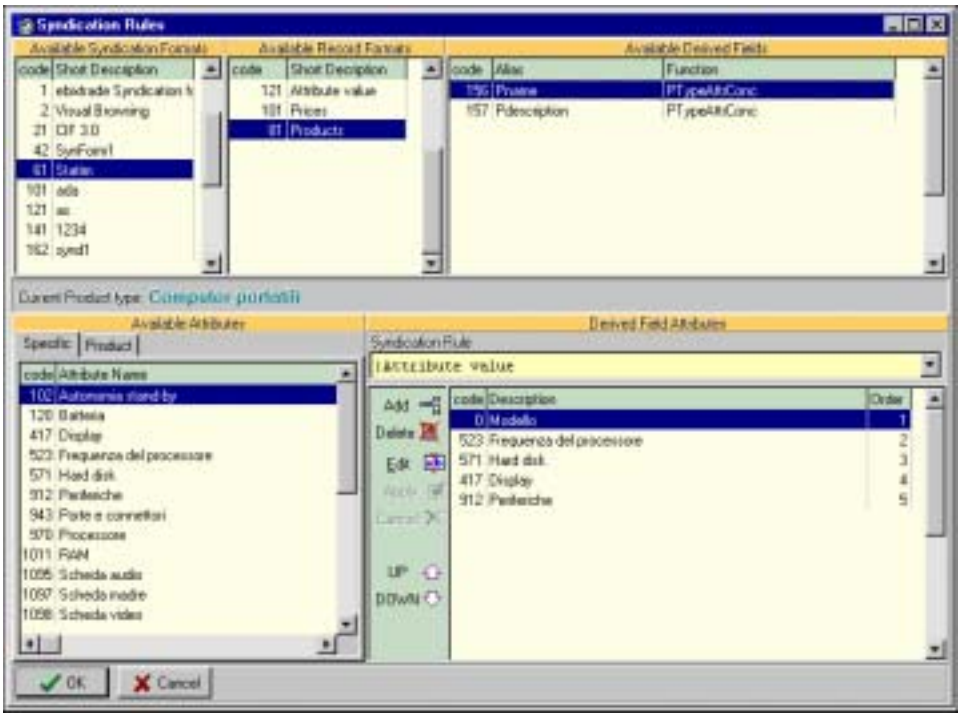
Description *field*

Text of the Assignment Description in the currently selected Language. Refers to the currently selected record in the Assignment Descriptions grid.

Orange Vertical Toolbar

Allows for adding and editing Assignment Descriptions. Refers to the currently selected Attribute in the Assigned Attributes grid.

Syndication Rules Window



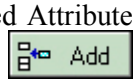
The Syndication Rules window is used for defining the content of the Derived Fields for the current Product Type. The content of a Derived Field is defined by concatenating several Product Type Attributes into one Derived Field ("Alias") using specific Syndication Rules according to the instructions of the publishing service provider.

Logic of the Syndication Rules Window:

- the current Product Type name is listed at the middle-left of the window;
- the Available Attributes grid refers to the current Product Type (current Product Type = currently selected record in the Available Product Types grid);
- the Derived Field Attributes grid refers to both current record in the Available Derived Fields grid and current Product Type; i.e. it lists the content of the selected Alias for this particular Product Type;
- the Available Derived Fields grid refers to the current Record Format (Available Record Formats grid);
- the Available Record Formats grid refers to the current Publisher (Available Publishers grid).

Elements of the Syndication Rules Window:

Available Attributes *grid*

Depending on the selected tab, lists the available Specific or Product Attributes assigned to the current Product Type. The selected Attribute is the one to be added as a Derived Attribute (to the Derived Field Attributes grid) upon clicking the 

button.

Syndication Rule *combo* *

Syndication Rule for the current Derived Attribute. The current Derived Attribute is the selected one in the Derived Field Attributes grid. To allow for changing the value in this combo box, click the

button.

Derived Field Attributes *grid*

Lists the Attributes for the current Derived Field (the current record in the Available Derived Fields grid). The listing order of the Derived Attributes (explicitly shown in the Order column) is the order in which the Derived Attributes are concatenated in the Derived Field.

Vertical Toolbar

Allows for managing of Derived Field Attributes.

Adds Derived Field Attribute. The Attribute to be added is the selected one in the Available Attributes grid.

Deletes Derived Field Attribute. The Attribute to be deleted is the selected one in the Derived Field Attributes grid.

Allows changing the Syndication Rule. (I.e. enables opening the Syndication Rule combo.) Refers to the currently selected Attribute in the Derived Field Attributes grid.

Moves the selected Derived Field Attribute one position up.

Moves the selected Derived Field Attribute one position down.

Available Derived Fields *grid*

Lists the available Derived Fields. The Derived Fields listed are the ones defined for the current Record Format. When a Derived Field is selected, its content displays in the Derived Field Attributes grid.

Available Record Formats *grid*

Lists the Record Formats available for the current Syndication Format (the one selected in the Available Syndication Formats grid). When a Record Format is selected, the Derived Fields defined for that Record Format display in the Available Derived Fields grid.

Available Syndication Formats *grid*

Lists the available Syndication Formats. The available Syndication Formats are the ones defined in the Syndication Formats folder. The Record Formats defined for the current Syndication Format display in the Available Record Formats grid.

How To Use the Syndication Rules Window

To (re-)define the content of a Derived Field:

1. From the Product Types Descriptions window, in the Available Product Types grid, find and select the Product Type for which you want to (re-)define Derived Field content.
2. Click

to enable the

button.
3. Click the

button to open the Syndication Rules window.
4. In the Syndication Rules window, from the Available Syndication Formats grid, select the desired Syndication Format. The Record Formats defined for that Syndication Format appear in the Available Record Formats grid.
5. From the Available Record Formats grid, select the desired Record Format. The Derived Fields defined for that Record Format appear in the Available Derived Fields grid.
6. From the Available Derived Fields grid, select the desired Derived Field for which you want to (re-)define content. The content for the Derived Field, if such content exists, appears in the Derived Field Attributes grid.

7. Manage the Derived Attributes using the Vertical Toolbar. You can add, delete, reposition Derived Field Attributes and change their Syndication Rules (For adding and deleting Attributes, see below.).
8. When finished, click

to apply changes and close Syndication Rules window.

To add a derived Attribute:

1. From the Available Attributes grid, select the appropriate tab depending on the type of Attribute you want to add (Specific for Specific Attribute, Product for Product Attribute).
2. Click

. A new record appears at the bottom of the grid. The record is currently blank.
3. From the Syndication Rules combo box, select the appropriate Syndication Rule.
4. Click

. The Attribute name appears in the new record.
5. If there are multiple Derived Field Attributes, use the

button to place the Attribute in the desired position.

To delete a derived Attribute:

1. In the Derived Field Attributes grid, select the Derived Field Attribute you want to delete.
2. Click

. The Attribute gets deleted.

Product Types – Categories Mapping Folder

What Is It for?

The Product Types – Categories Mapping folder allows for mapping Product Types to the categories of the Classifications Systems. Mapping Product Types to categories enables you to find Product Types through structured searching by category (e.g. in Companies folder, Product Types screen) and allows for the System's input and output to comply with suppliers' and publishers' requirements.

What Can You Do in Product Types – Categories Mapping Folder?

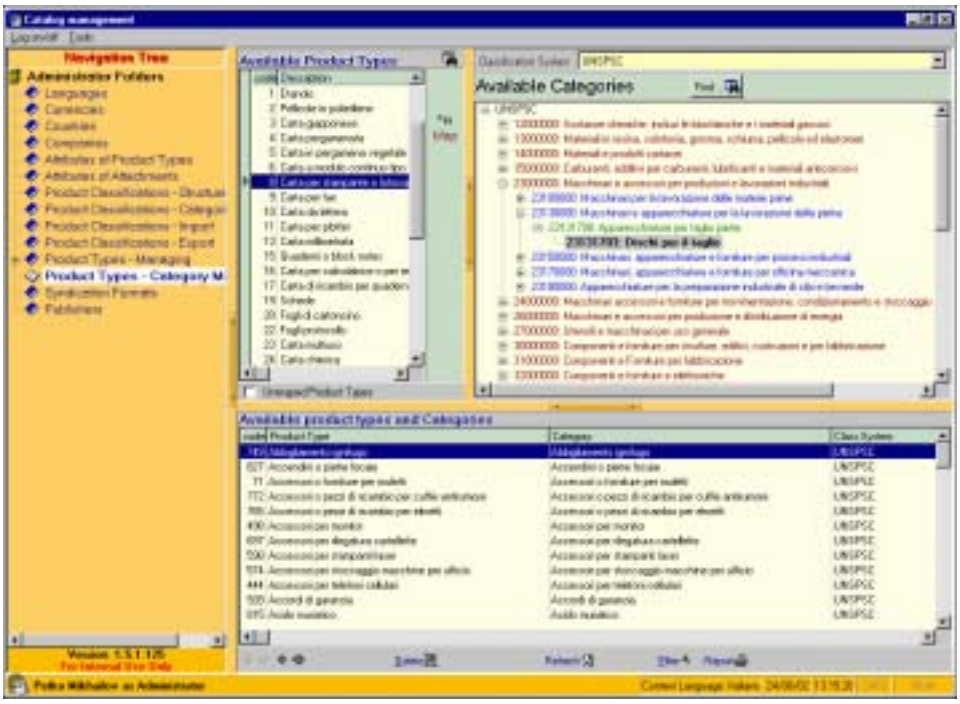
In the Product Types – Categories Mapping folder you can:

- map Product Types to Classifications System's categories;
- remove existing mappings of Product Types to categories;
- generate reports about mappings of Product Types to categories;
- create and modify templates for these reports.

How To Access Product Types – Categories Mapping Folder?

From the Navigation Tree, select the Product Types – Categories Mapping folder. The Product Types – Categories Mapping screen displays in the right frame.

The Product Types – Categories Mapping Screen



Available Product Types and Categories *grid*

Lists the existing mappings of Product Types to categories.

AVAILABLE CATEGORIES FORM

Data displayed in the Available Categories form refer to the currently selected Classification in the Classification System combo box.

Classification System *combo* *

Lists the available Classification Systems. The available Classification Systems are the ones defined in the Product Classifications – Structure folder. The currently selected Classification displays in the Available Categories field.

Available Categories *field*

Displays the current Classification by categories in tree-like view. Each level in the tree-like view has its distinctive font color; the lowest level font color is **bold red**. The Available Categories field displays only one Classification at a time – the one that is currently selected in the Classification System combo box.

grid button

Opens the Search for Category window for locating a Category within the current Classification. You can search by Category Name, Category Level, and/or by Category Code. Useful for large classifications that are too big to be searched manually by scrolling. For more information on search for category, refer to

the "Search for Product Types Window" chapter, the 'By Category' part.

AVAILABLE PRODUCT TYPES FORM

Available Product Types *grid*

Depending on the current status of the Unmapped Product Types checkbox, lists all available Product Types or only the Product Types that are not mapped to any category of the current Classification System. The available Product Types are the ones defined in the Product Types – Managing folder. The selected Product Type(s) are to be mapped (upon clicking the

button) to the currently selected lowest level Category in the Available Categories field. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

grid button

Opens the Search for Product Types window for searching and locating a Product Type within the Available Product Types *grid*.

Unmapped Product Types *checkbox*

When checked, only unmapped Product Types are displayed in the Available Product Types grid.

Maps the selected Product Type(s) in the Available Product Types grid to the currently selected lowest level Category in the Available Categories field.

Syndication Formats Folder

What Is It for?

The Syndication Formats folder is used for defining and managing Syndication Formats. Once defined, the Syndication Formats can be assigned to Publishers (in Publishers folder) and then used by the Operator for performing Syndication (Syndication folder, Operator interface).

What Can You Do in Syndication Formats Folder?

In Syndication Formats folder you can:

- declare Syndication Formats;
- define Record Formats for each Syndication Format;
- edit/update Syndication Formats and their Record Formats;
- change Syndication Formats' status;
- generate reports about Syndication Formats;
- create and modify templates for these reports.

How To Access Syndication Formats Folder?

To access the Syndication Formats folder:

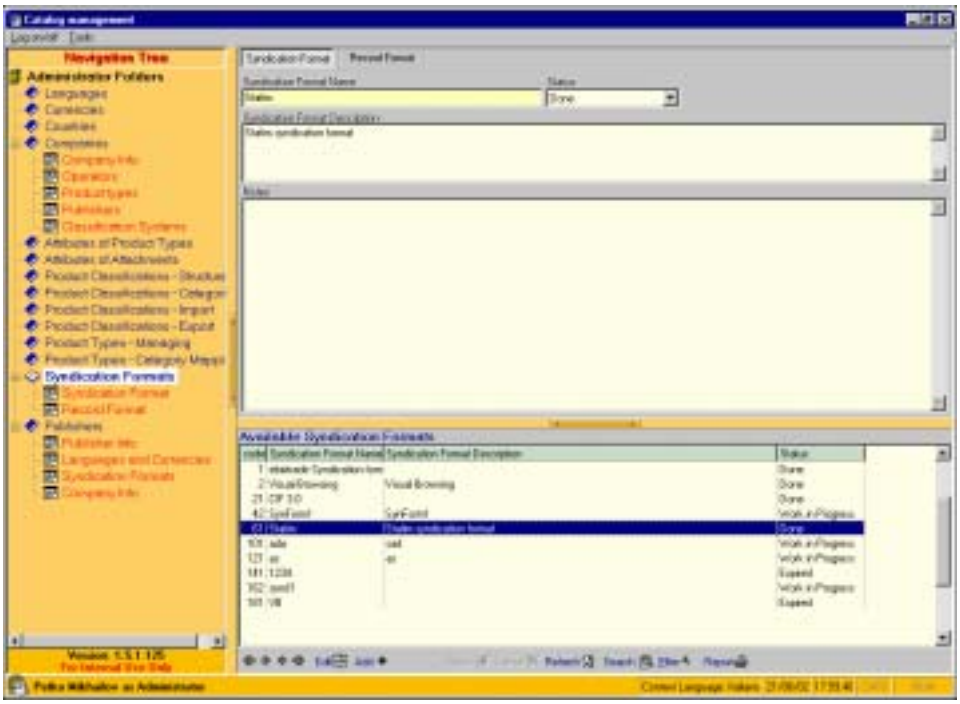
- From the Navigation Tree, select the Syndication Formats folder. The first screen in the folder – Syndication Format – displays in the right frame.

The Syndication Formats Screens

Available Syndication Formats *grid*

Lists the available Syndication Formats.

Syndication Format Screen



The Syndication Format screen is used for declaring Syndication Formats and changing their status.

DETAIL FORM

Data displayed in the form refer to the currently selected record in the Available Syndication Formats grid.

Syndication Format Name *field* *
: Name of the current Syndication Format.

Syndication Format Description *field*
: Description of the current Syndication Format.

Notes *field*
: Field for free-form text notes about the format.

Status *combo*
: Status of the current Syndication Format. The available options are *WORK IN PROGRESS*, *DONE*, and *EXPIRED*. Selecting the *DONE* status makes the format available for assigning to Publishers in Publishers folder.

Record Format Screen

The Record Format screen is used for defining and managing Record Formats for the current Syndication Format.

RECORD FORMATS SECONDARY GRID

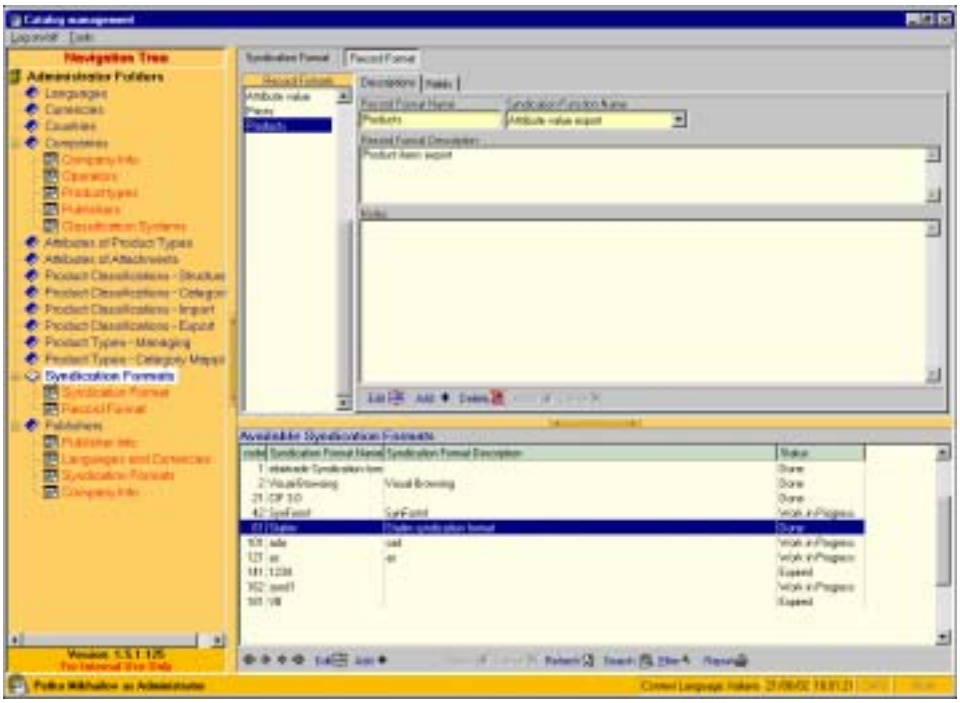
Record Formats *grid*

Lists the Record Formats defined for the current Syndication Formats. The content for the current Record Format is displayed in tab form.

TERTIARY TAB FORMS

Data displayed in the tab forms refer to the currently selected record in the Record Formats grid.

Descriptions Tab



The Descriptions tab is used for declaring Record Formats.

Record Format Name *field* *

Name of the current Record Format.

Record Format Description *field*

Description of the current Record Format.

Notes *field* Field for free-form notes for the current Record Format.

Syndication Function Name *combo* *

Syndication function to be used for the current Record Format. The available choices are: *PRODUCTS EXPORT*, *PRICES EXPORT*, *ATTRIBUTE VALUE EXPORT*, and *VISUAL BROWSING*. The first three correspond to the Ariba record formats as follows:

PRODUCTS EXPORT	=	Ariba Product Record Format
PRICES EXPORT	=	Ariba Prices Record Format
ATTRIBUTE VALUE EXPORT	=	Ariba Attribute Values Record Format

For details on Ariba record formats, refer to the Appendix. The Visual Browsing format is used for publishing syndicated content to web pages. For more information on Visual Browsing, refer to the "Creating the Visual Browsing Record Format" chapter.

Descriptions tab toolbar

Manages Record Formats.

Allows edits/updates to the current Record Format.

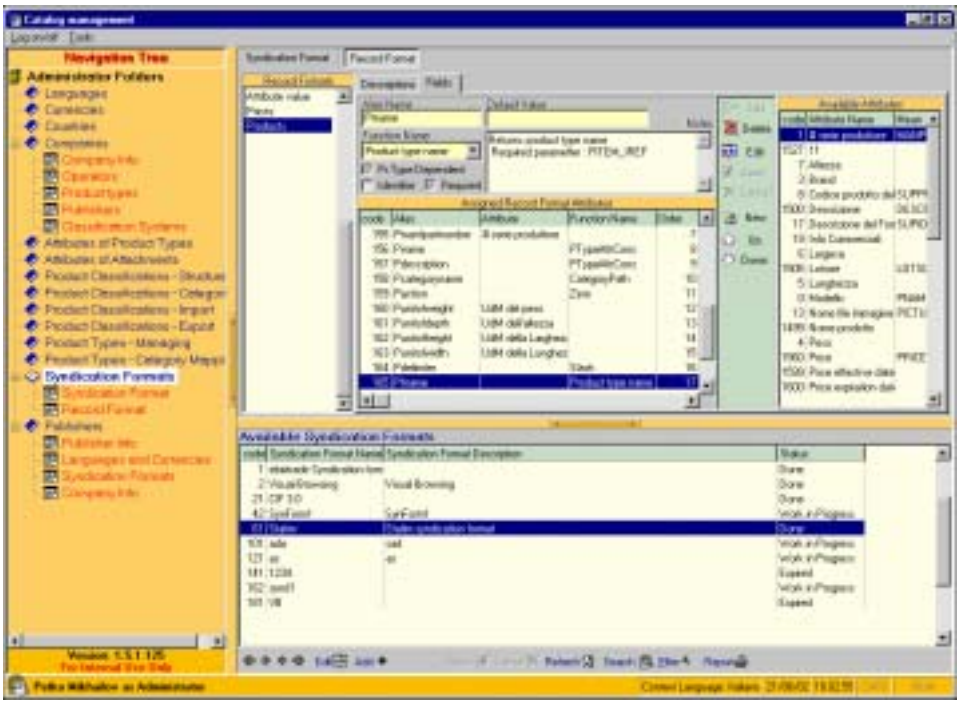
Adds new Record Format.

Deletes the current Record Format.

Applies edits/updates made to the current Record Format.

Cancels edits/updates made to the current Record Format.

Fields Tab



The Fields tab is used for assigning Derived Attributes to the current Record Format.

Available Attributes *grid*

Lists the Product Attributes available for assigning to the current Record Format. The available Product Attributes are those defined in the Attributes of Product Types folder with *PRODUCT* Attribute Context.

Assigned Record Format Attributes *grid*

Lists the Derived Fields assigned to the current Record Format.

Vertical Toolbar

Manages the Assigned Record Format Attributes.

Creates new Assigned Record Format Attribute based on an existing Available Attribute. The Attribute to be added is the currently selected one in the Available Attributes grid. When clicked, opens the Syndication Record Popup Dialog for entering the parameters of the Attribute assigning. The current Available Attribute name is suggested for an Alias Name by default. Fill-in the appropriate values and click

. For details about the Syndication Record Popup Dialog, see below.

Deletes Assigned Record Format Attribute. The Attribute to be deleted is the currently selected one in the Assigned Record Format Attributes grid.

Allows edits/updates to the current Assigned Record Format Attribute.

Applies edits/updates made to the current Assigned Record Format Attribute.

Cancels edits/updates made to the current Assigned Record Format Attribute.

Creates new Derived Attribute in the Assigned Record Format Attributes grid. The Attribute to be added is the currently selected one in the Available Attributes grid. When clicked, opens the Syndication Record Popup Dialog for entering the parameters of the Attribute assigning. Fill-in the appropriate values and click

. For details about using the Syndication Record Popup Dialog, refer to 'Syndication Record Popup Dialog'.

Moves the current Derived Attribute in the Assigned Record Format Attributes grid one position up.

Moves the current Derived Attribute in the Assigned Record Format Attributes grid one position down.

ASSIGNED RECORD FORMAT ATTRIBUTES FORM

Alias Name *field* *

Name by which the Assigned Record Format Attribute will be available in the Record Format. The Alias name must comply to the requirements of the publishing service provider.

Identifier *check box*

When checked, the current Assigned Record Format Attribute will be used as identifier. The "Identifier" is one or more Derived Attribute(s) used by the System to uniquely identify each Syndication Record when performing Syndication with this Record Format. Once you designate an identifier for a Record Format to ensure uniqueness, the System will prevent any duplicate or blank content from being exported in the Syndication process. (The Operator will get an error message when attempting export of duplicate Syndication Records (Syndication folder, Operator interface).) In situations where you can't guarantee the uniqueness of any single Derived Attribute, you may be able to designate two or more fields as the Identifier..

Notes *field* Displays a Function's description if a Function is used for the current Assigned Record Format Attribute.

Required *check box*

Check this box if the current Derived Field is marked as required in the specification of the publishing service provider.

Default Value *field* *

Default value for the current Assigned Record Format Attribute. This is the value to be used when the corresponding Attributes are blank for some Product Records. The Default Value is entered by the System when performing Syndication. Enter the default value given by the Supplier / Publishing Manager if such information has been provided.

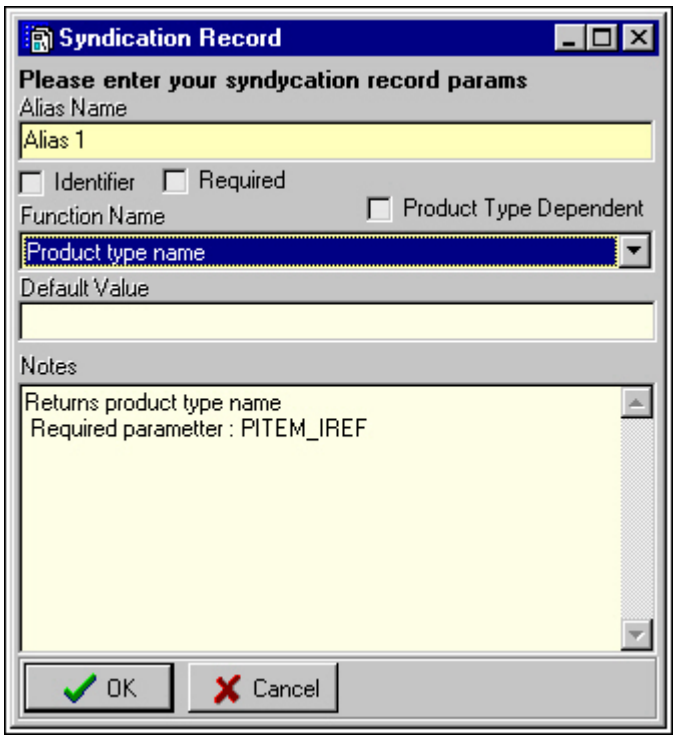
Product Type Dependent *checkbox*

Assigns the Product Type Attribute Concatenation function. When checked, the Product Type Attribute Concatenation function is assigned to the current Assigned Record Format Attribute creating a concatenated Derived Field. When you have created a Record Format that contains concatenated Derived Fields, you need do define the content of the concatenated Derived Fields in the Syndication Rules window (Product Types Descriptions screen).

Function Name *combo* *

Function used for the current Assigned Record Format Attribute. The available function choices are pre-defined by the developer of the System.

Syndication Record Popup Dialog



Syndication Record Popup Dialog appears upon clicking the Add or New buttons. Used for defining the parameters of a new Assigned Record Format Attribute. Displays the same fields as the Assigned Record Format Attributes form. For explanations of these fields, refer to 'Assigned Record Format Attributes Form'.

How To Create Syndication Formats

Creating a new Syndication Format is a two-step process:

1. You declare a new Syndication Format, then
2. You declare the Record Formats for this Syndication Format.

Declaring a New Syndication Format

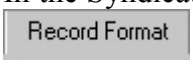
To declare a new Syndication Format:

1. From the Navigation Tree, select “Syndication Formats” folder. The Syndication Format screen appears in the right frame.
2. Click the Add button. A new blank record appears at the bottom of the Available Syndication Formats grid.
3. In the Syndication Format Name field, type-in a name for the format.

4. Optionally, in the Syndication Format Description and Notes fields, you can enter additional information about the format.
5. Click to confirm the new Syndication Format record.
6. Create Record Format(s) for this Syndication Format. (See 'Creating a New Record Format'.)
7. When finished with Record Formats, change the Syndication Record status to *DONE*. To do this:
   7.1. From the Navigation Tree, select "Syndication Formats" folder. The Syndication Format screen appears in the right frame.
   7.2. Click the button to enable the Status combo box.
   7.3. From the Status combo box, select *DONE*.
   7.4. Click to confirm the status.

Creating a New Record Format

To create a New Record Format:

1. In the Syndication Format folder, from the Navigation Bar, click the  button. The Record Format screen appears in the right frame.
2. From the Available Syndication Formats grid, select the Syndication Format record for which you want to define a Record Format.
3. From the Descriptions tab toolbar, click . A new blank record appears at the bottom of the Record Formats grid.
4. In the Record Format Name field, type-in a name for the format.
5. From the Syndication Function Name combo box, select the appropriate option.
6. Optionally, in the Record Format Description and Notes fields, you can enter additional information about the format.
7. Click the Fields tab.
8. In the Fields tab, create simple and/or complex Derived Fields using the and buttons, respectively. For information on adding Derived fields, see below.
9. In the Assigned Record Format Attributes grid, arrange the records in the required order using the and buttons.

Adding a Simple Derived Field

To add a Simple Derived Field to the current Record Format:

1. In the Syndication Formats folder, Record Format screen, Fields tab, make sure the appropriate Available Syndication Format and Record Format are selected.
2. From the Available Attributes grid, select the desired Product Attribute.
3. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
4. In the Alias Name field, type-in the name for the Derived Field. The Alias Name should comply to the requirements of the publishing service provider.
5. Set the appropriate options for Default Value and the Required and Identifier checkboxes.
6. Click

. The field gets added to the Assigned Record Format Attributes grid.

Adding a Complex Derived Field

To add a Compex Derived Field to the current Record Format:

1. In the Syndication Formats folder, Record Format screen, Fields tab, make sure the appropriate Available Syndication Format and Record Format are selected.
2. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
3. In the Alias Name field, type-in the name for the Derived Field. The Alias Name should comply to the requirements of the publishing service provider.
4. Select the appropriate function from the Function Name combo box or check the Product Type Dependent box.
5. Click

. The field gets added to the Assigned Record Format Attributes grid.

Note:

If you have checked the Product Type Dependent box, you have defined a concatenated Derived Field. In this case, prior to using the Record Format, you need to define content for this field from the Syndication Rules window

(Product Types Descriptions screen). For more information, refer to "How To Use the Syndication Rules Window".

Creating the Visual Browsing Record Format

The purpose of this chapter is to provide a practical example of creating a Record Format. The sample Record Format used is Visual Browsing, a Record Format that comprises four Derived Fields: two simple fields and two concatenated complex fields.

To Create a Visual Browsing Record Format:

1. In the Syndication Formats folder, Record Format screen, Fields tab, make sure the appropriate Available Syndication Format and Record Format are selected.
2. From the Available Attributes grid, select # *SERIE PRODUTTORE*.
3. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
4. In the Alias Name field, type-in `Mapped Field 1`
5. Click

. The first simple Derived Field gets added to the Assigned Record Format Attributes grid.
6. From the Available Attributes grid, select *BRAND*.
7. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
8. In the Alias Name field, type-in `Mapped Field 2`
9. Click

. The second simple Derived Field gets added to the Assigned Record Format Attributes grid.
10. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
11. In the Alias Name field, type-in `Derived Field 1`
12. Check the Product Type Dependent box.
13. Click

. The first complex concatenated Derived Attribute gets added to the Assigned Record Format Attributes grid.
14. From the Vertical Toolbar, click

. The Syndication Record dialog box pops up.
15. In the Alias Name field, type-in `Derived Field 2`
16. Check the Product Type Dependent box.

17. Click

. The second complex concatenated Derived Attribute gets added to the Assigned Record Format Attributes grid.

Note:

Because you have defined concatenated complex Derived Fields, prior to using the Record Format, you need do define content for these fields from the Syndication Rules window (Product Types Descriptions screen). For more information, refer to 'How To Use the Syndication Rules Window'.

Publishers Folder

What Is It for?

In the Publishers folder you define Publishers and set their parameters. The defined Publishers are used by the Operator for performing Syndication.

What Can You Do in Publishers Folder?

In Publishers folder you can:

- declare Publishers;
- assign Syndication formats to Publishers;
- assign Languages to Publishers;
- assign Currencies to Publishers;
- view Publisher's company information;
- generate reports about Publishers;
- create and modify templates for these reports.

How To Access Publishers Folder?

To access Publishers folder:

- From the Navigation Tree, select Publishers. The first screen of the Publishers folder screens – Publisher Info – appears in the right frame.

The Publishers Screens

Select Publishing Manager *combo*

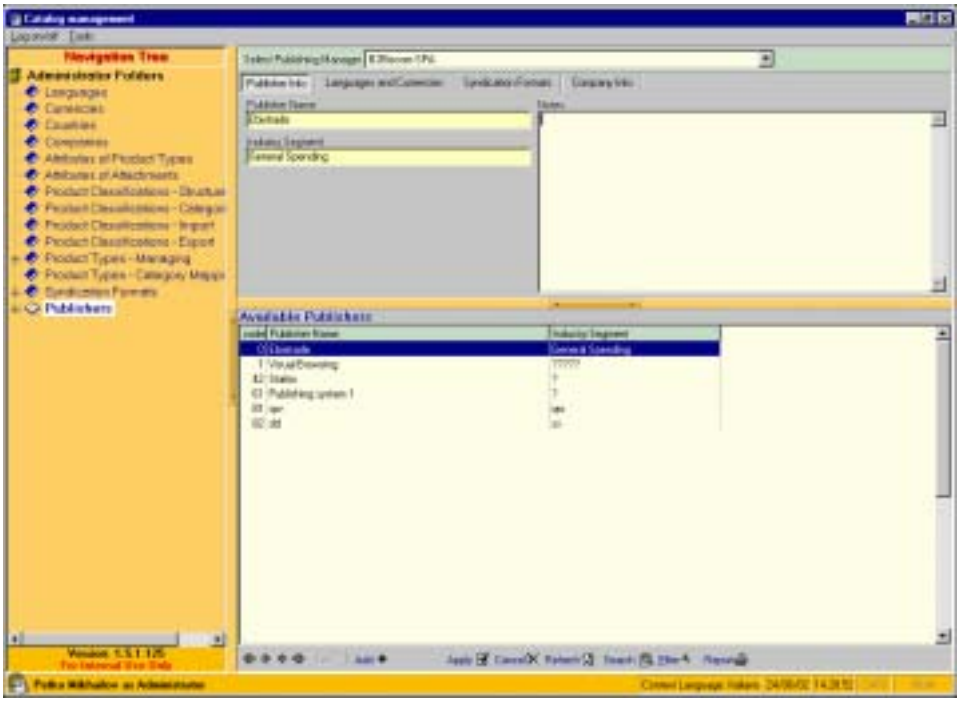
Lists the available publishing service providers. The available Publishing Managers to choose from are the Companies the Company Role of which is set to either *PUBM* or *BOTH* (Company Info screen, Companies folder). Upon selecting a Publishing Manager, the Publishers assigned to that Manager appear in the Available Publishers grid.

MASTER GRID

Available Publishers *grid*

Lists the Publishers, assigned to the current Publishing Manager. The details for the currently selected Publisher, display in the form above the grid.

Publisher Info Screen



Publisher Name *field* *

Name for the currently selected Publisher.

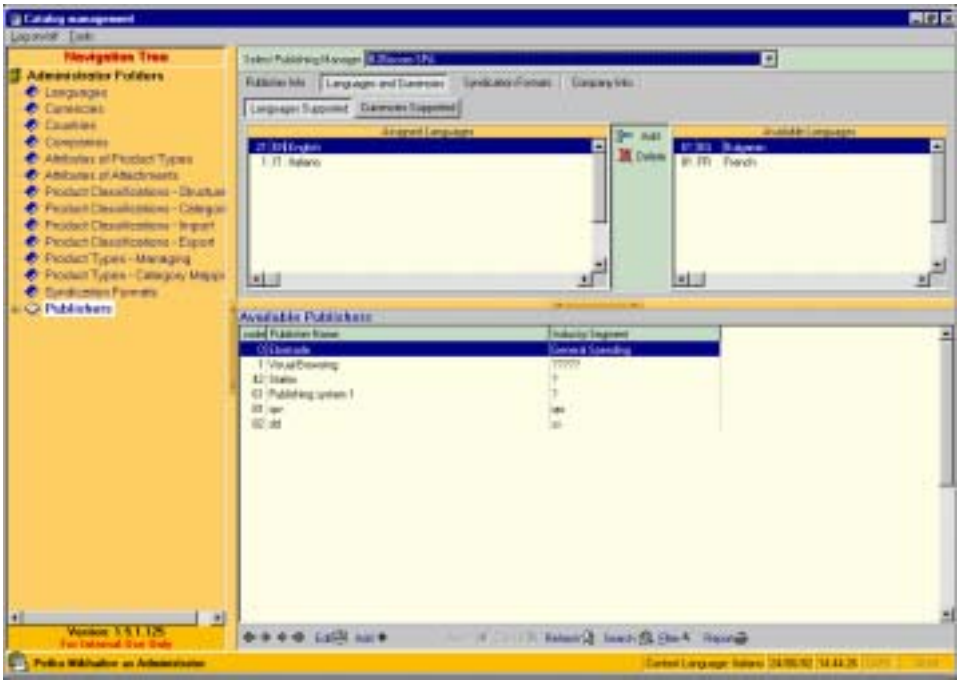
Industry Segment *field* *

Industry Segment for the currently selected Publisher.

Notes *field* Field for free-form text notes about the Publisher.

Languages and Currencies Screen

LANGUAGES SUPPORTED DETAIL FORM



Available Languages *grid*

Lists the Languages available for assigning.
(Available Languages = all Languages minus the Assigned Languages;
all Languages = the Languages defined in the Languages folder)

Assigned Languages *grid*

Lists the Languages assigned to the current Publisher.

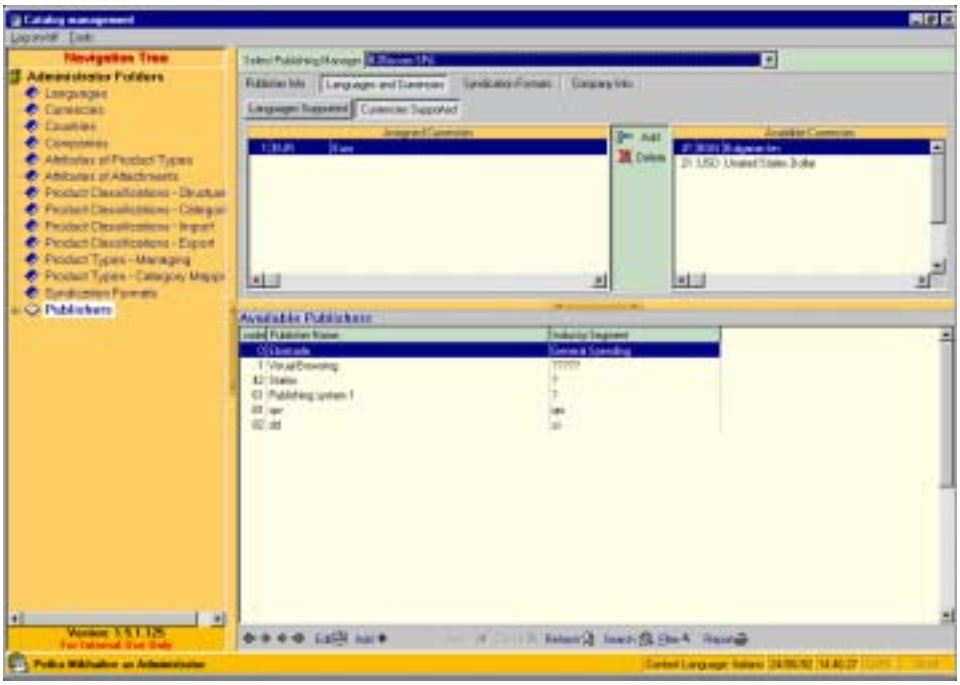
Vertical Toolbar

Manages Language assigning.

Assigns language. When clicked, moves the currently selected Available Language to the Assigned Languages grid.

Removes language assignment. When clicked, moves the currently selected Assigned Language back to the Available Languages grid.

CURRENCIES SUPPORTED DETAIL FORM



Available Currencies *grid*

Lists the Currencies available for assigning.
(Available Currencies = all Currencies minus the Assigned Currencies;
all Currencies = the Currencies defined in the Currencies folder)

Assigned Currencies *grid*

Lists the Currencies assigned to the current Publisher.

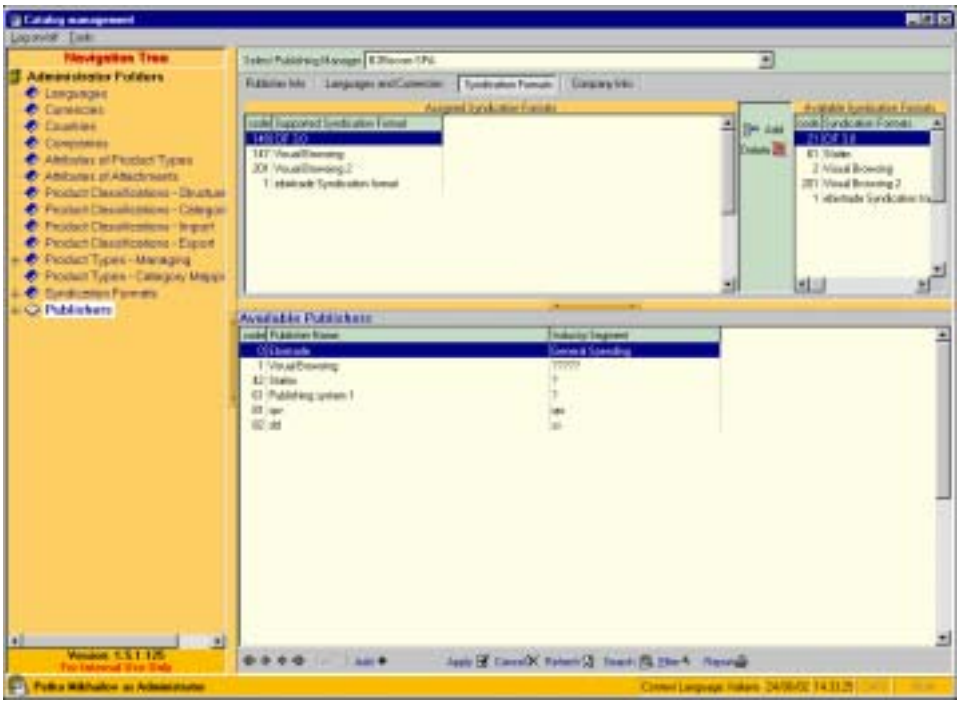
Vertical Toolbar

Manages Currency assigning.

Assigns Currency. When clicked, moves the currently selected Available Currency to the Assigned Currencies grid.

Removes assigned Currency. When clicked, moves the currently selected Assigned currency back to the Available Currencies grid.

Syndication Formats Screen



Available Syndication Formats *grid*

Lists the available Syndication Formats. The available Syndication Formats are the ones defined in the Syndication Formats folder.

Assigned Syndication Formats *grid*

Lists the assigned Syndication Formats.

Vertical Toolbar

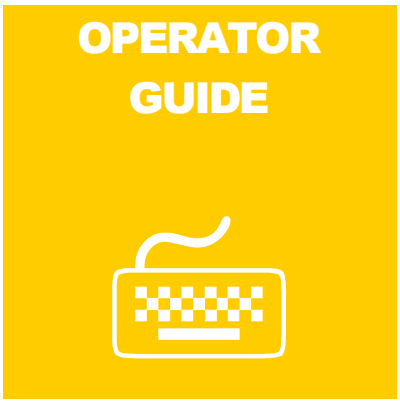
Manages assigning of Syndication Format.

Assigns Syndication Format. The Syndication Format to be assigned is the selected one in the Available Syndication Formats grid.

Removes an assigned Syndication Format. The Syndication Format to be removed is the selected one in the Assigned Syndication Formats grid.

Corporate Info Screen

Displays the company details about the currently selected Publisher. This is the same Company Info screen as the one in the Companies folder. For more details about Company Info screen, refer to "Companies Folder" chapter.



All explanations in the Operator Guide refer to Operator's interface. When explaining form fields (under the DETAIL FORM caption), fields are listed in navigation order (the order in which you navigate through the form when pressing the Tab key).

Products – Prepare Excel Template Folder

What Is It for?

The Products – Prepare Excel Template folder is used for preparing templates in MS Excel format for Product data input. The Excel templates prepared in this folder contain help instructions, color codes, and make the input process flexible and relatively easy for people familiar with MS Excel. Once the Product data is filled in the template, it can be imported into the System using the System's product import function (in the Products – Import < Excel Template folder).

Using System-generated Excel templates makes the Product import process as error-free as possible.

What Can You Do in Products – Prepare Excel Template Folder?

In Products – Prepare Excel Template Folder you can:

- prepare Excel templates for Product data import.

How To Access Products – Prepare Excel Template Folder?

To access Products – Prepare Excel Template folder:

- From the Navigation Tree, select the Products – Prepare Excel Template folder. The first screen in the folder – General Parameters – displays in the right frame.

The Products – Prepare Excel Template Screens

Vertical Toolbar

Manages the export process.

Applies the options selected in the current screen and takes you to the next step of the process.

Takes you back to the previous step of the process.

Generates the template.

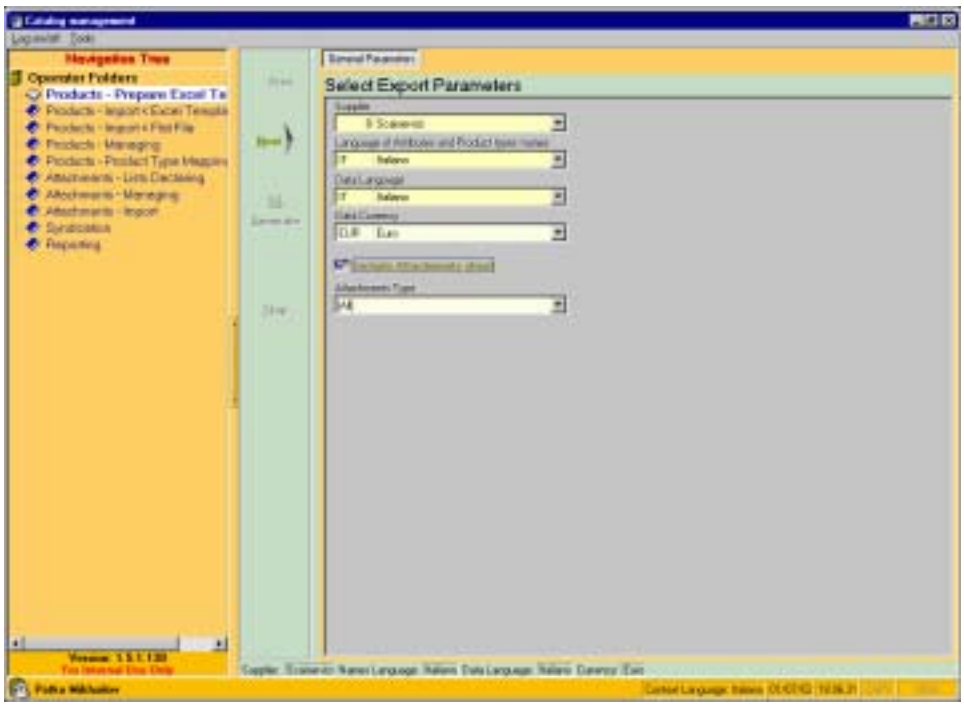
Stops and cancels the template generation process (after starting the generation process with the

button).

Status Bar (at the bottom)

Displays the current selections made in the General Parameters screen.

General Parameters Screen



Supplier *combo* *

Supplier for which data will be imported. Lists the supplier companies available to the current Operator. The available companies are those assigned to the Operator (from the Operators screen, Companies folder, Administrator interface).

Language of Attributes and Product Type Names *combo* *

Context Language for the template. The available language choices are the ones defined in the Languages folder. Selecting *[CURRENT]* creates the template in the Operator's current Context Language.

Data Language *combo* *

Data Language for the template. The available language choices are the ones defined in the Languages folder. Selecting *[CURRENT]* creates the template with the same Data Language as the Operator's current Context Language.

Data Currency *combo*

Currency format for the values (i.e. the figures) of the currency-dependent Attributes (e.g. "Price") for the template. The available Data Currency choices are the ones defined in the Currencies folder plus *[NONE]*. *[NONE]* is the default value and is used when import of currency-dependent Attributes is not intended. **If there are currency-dependent Attributes to be entered, be sure to make the appropriate Data Currency choice or the imported data is going to be incorrect and/or unusable.**

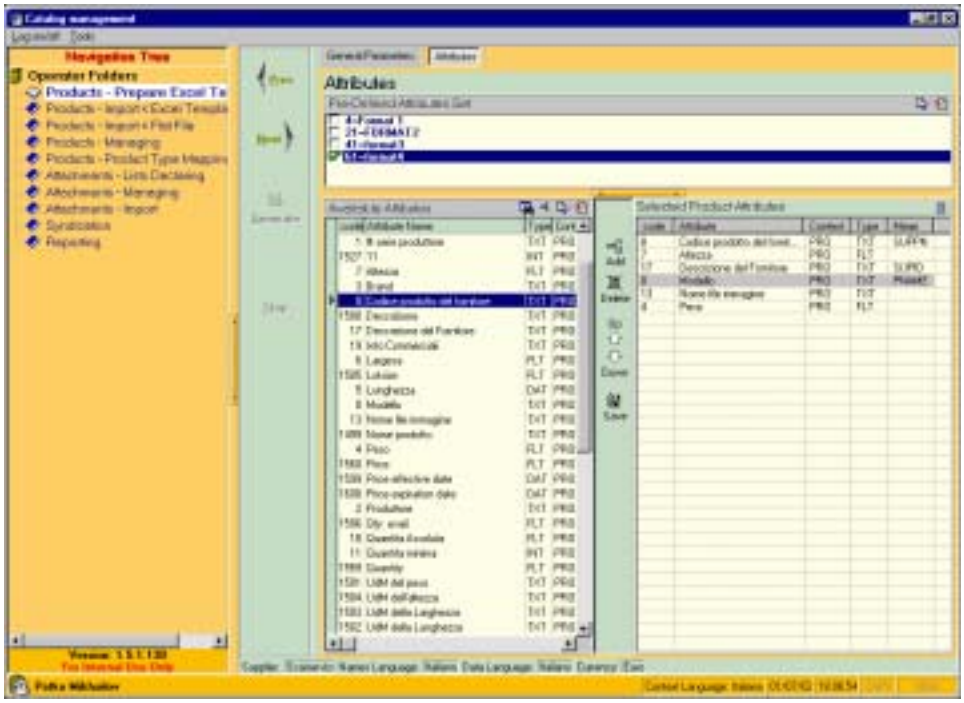
Include Attachment Sheet *checkbox*

When checked, the template will have additional sheet for attachments input.

Attachments Type *combo*

Type(s) of attachments to be entered through the template. The available Attachment Type choices are *PICTURES, DOCUMENTS*, *SOUNDS*, *MOVIE*, and *[ALL]*. Selecting a particular Attachment Type (e.g. *DOCUMENTS*) limits the attachment list choices in the Select Attachment List To Export combo, Product Types screen, to only those attachment lists that are defined for the selected Attachment Type. E.g. if you select *DOCUMENTS* in the Attachment Type combo, the Select Attachment List To Export combo will display only the attachment lists containing documents.

Attributes Screen



PRE-DEFINED ATTRIBUTE SETS FORM

Pre-Defined Attribute Sets *selection box*

Lists the available pre-defined attribute sets. When an attribute set is checked, the Attributes it contains get loaded into the Selected Product Attributes grid.

form header button

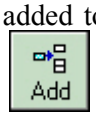
Selects all Pre-Defined Attribute Sets and loads their Attributes onto the Selected Product Attributes grid.

form header button

Clears all checked Pre-Defined Attribute Sets.

GRIDS

Available Attributes *grid*

Lists all Product Attributes. The selected Available Attributes are going to be added to the Selected Product Attributes grid upon pressing the 

button. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

grid button Opens the Search for Attribute pop-up window for locating Attributes within the grid. You are provided with options to search by Attribute Name, Attribute Description, Attribute Type, and Standard Meaning.

grid button Opens the Filter pop-up window for filtering the Attributes in the grid. When, after applying the filter, you want to display all Available Attributes anew, **open the Filter window again an click the**

button.

grid button Selects all records in the grid.

grid button Clears all selections made in the grid.

Selected Product Attributes *grid*

Lists the Product Attributes to be included in the template. The listing order of the Attributes in the grid affects the order in which the Attributes will appear in the template. There is one required pre-defined Selected Product Attribute – *CODICE PRODOTTO DEL FORNITORE*. It is always occupies in the top position and cannot be removed from the grid.

grid button Removes all Selected Product Attributes and clears the grid.

Vertical Toolbar

Manages the process of assigning Attributes to the template.

Adds Attribute(s) to the template. The Attribute(s) to be added is/are the currently one(s) in the Available Attributes grid. The added Attribute(s) appear(s) in the Selected Product Attributes grid.

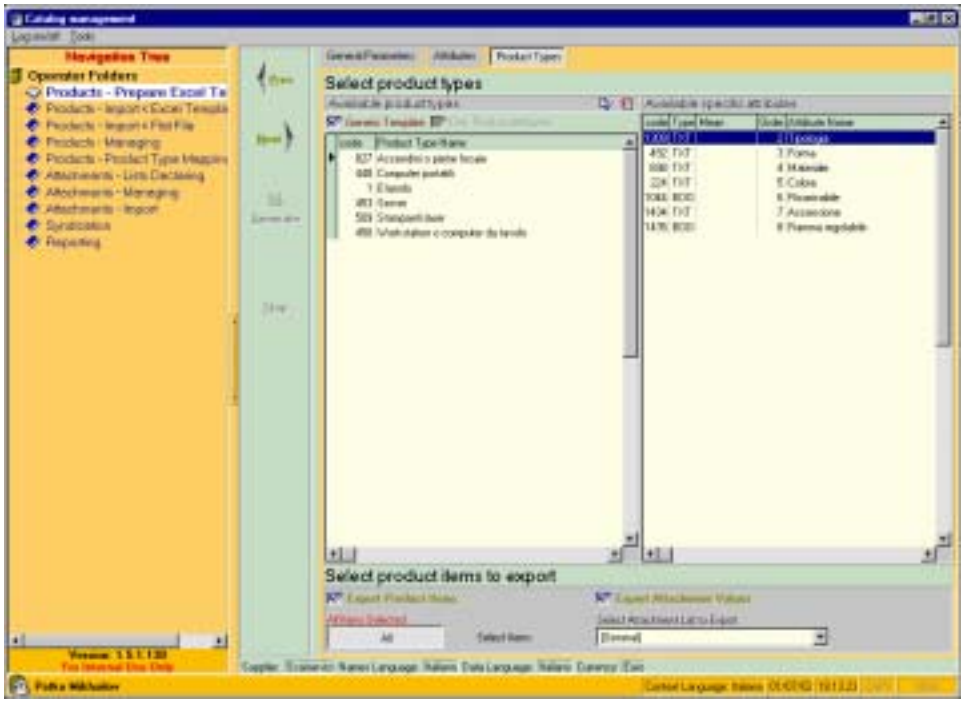
Removes Attribute(s) from the template. The Attribute to be removed is the currently selected one in the Selected Product Attributes grid.

Moves the current Selected Product Attributes one position up.

Moves the current Selected Product Attributes one position down.

Saves the current content of the Selected Product Attributes grid as a pre-defined Attribute set.

Product Types Screen



SELECT PRODUCT TYPES FORM

Available Product Types *grid*

Lists for selection the Product Types available for the current Supplier. The selected Product Types will be included in the template. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows". The Specific Attributes for the last selected Available Product Type get listed in the Available Specific Attributes grid. (The last selected Available Product Type is indicated by a right-pointed arrow (➢) at the left of the code column.)

Available Specific Attributes *grid*

Lists the Specific Attributes for the last selected Available Product Type.

Generic Template *checkbox*

When checked, cancels all selections made in the Available Specific Attributes grid and sets on the option for creating a Generic Template. The Generic Template is a template that has one unnamed Product Type with Product Attributes.

Only Product Attributes *checkbox*

When checked, no Product Attributes will be included in the template.

grid button Selects all Available Product Types.

grid button Clears all checked Available Product Types.

SELECT PRODUCT ITEMS TO EXPORT FORM

Export Product Items *checkbox*

When checked, the Products available for the respective Product Types will be included in the template.

When depressed, the Products for all selected Available Product Types will be included in the template.

When depressed, only the selected Products will be included in the template. Pressing this button opens the Search for Product Items window for finding and selecting Products. For more information on using the Search for Product Items window, refer to "Search for Product Items Window" chapter.

Export Attachment Values *checkbox*

When checked, the template will contain the available attachments' values for the selected attachment list (from the Select Attachment List To Export combo).

Select Attachment List To Export *combo*

Attachment list(s) to be included in the template. Lists all available Attachment Lists for the currently selected attachment list type (the current selection in the Attachment Type combo, General Parameters screen).

Using the Excel Template

Managing Products with the Excel Template

To add/update/delete Product in the Excel Template:

1. In MS Excel, make sure your user settings permit running macros. (Tools menu > Macro > Security).
2. Open the Excel Template file in MS Excel.
3. In the Excel Template file, in the Help Sheet, in column A (Description), click a Product Type link to go to the respective Sheet for that Product Type.
4. In the Product Type Sheet, add/update/delete Product records as necessary. Depending on the option you choose, the Product record will be added, updated, or deleted upon importing the Excel file. For instructions on adding, updating, and deleting Products and Attachments, refer to the respective topic.

5. When finished managing Products for that Product Type, click the Help button (A1 cell) to go back to the Help Sheet.
6. Repeat steps 3÷5 for every Product Type listed.
7. Save your work.
8. Import the Excel file. (For more information on importing, refer to "Products Import < Excel Template Folder" chapter.)

Updating Products with the Excel Template

To update the Attribute values of a Product:

1. In the Product Type Sheet, find by reference number (in the Ref. column) the row for the Product you want to update.
2. In the row for that Product, type-in the Attribute values for every desired Attribute (Attributes are listed by columns.). You can get a tooltip about an Attribute by placing the mouse pointer over the respective column header. You can both enter data to blank cells or update existing data. Be sure to enter data in the appropriate format depending on the Type of each Attribute (i.e. enter figures for "Price", dates in the appropriate date format, etc.). Note that the Action cell automatically changes its status to *UPDATE*.
3. After entering the desired Attributes, click the ellipsis button (...) at the right of the Attachments cell to go to the Attachments Sheet for managing the Attachments for that Product. (For instructions on managing Attachments, refer to "Managing Attachments in the Excel Template".)
4. When finished managing Attachments, click the Help button (A1 cell) to go to the Help Sheet or the Back button (B1 cell) to go back to the original Product Type Sheet from which you entered the Attachments Sheet.

Adding Products with the Excel Template

To add a new Product Record:

1. In the Product Type Sheet, go down to the first blank row.
2. In the blank row (which will be the record for that Product), type-in the Attribute values for every desired Attribute (Attributes are listed by columns.). You can get a tooltip about an Attribute by placing the mouse pointer over the respective column header. Be sure to enter data in the appropriate format depending on the Attribute's types (i.e. enter figures for "Price", dates in the appropriate date format, etc.). Note that the Action cell changes its status to *INSERT* and a reference number for that Product assigns automatically in the

Ref. cell. (The reference number is negative which indicates a new Product.)

3. After entering the desired Attributes, click the ellipsis button (...) at the right of the Attachments cell to go to the Attachments Sheet for managing the Attachments for that Product. (For more information on managing Attachments, refer to "Managing Attachments in the Excel Template".)
4. When finished managing Attachments, click the Help button (A1 cell) to go to the Help Sheet or the Back button (B1 cell) to go back to the original Product Type Sheet from which you entered the Attachments Sheet.

Deleting a Product with the Excel Template

To delete a Product Record:

1. In the Product Type Sheet, find by reference number (in the Ref. column) the row for the Product you want to delete.
2. Click the Action cell at the left of the reference number. The Action cell turns into a combo box displaying three options to choose from: *INSERT*, *UPDATE*, and *DELETE*. Select *DELETE*.

Managing Attachments in the Excel Template

When the Attachments Sheet is accessed from a Product Type Sheet (through the ellipsis button (...)), the reference number for the current Product Item is listed on top of the Item Ref. column (in the C1 cell). The Attachments assigned to the current Product are indicated by a tick (marked checkbox) in the Item Ref. column.

The procedures below assume that you have entered the Attachments Sheet from the respective Product Type Sheet.

Updating Attachments in the Excel Template

To update the Attachments for a Product:

1. In the Attachments Sheet, find by reference number (in the Item Ref. column) and filename (Filename column) the row for the Attachment you want to update.
2. In the row for that Attachment, type-in the Attribute values for every desired Attachment Attribute (Attachment Attributes are listed by columns.). You can get a tooltip about an Attribute Type by placing the mouse pointer over the respective column header.
   You can both enter data to blank cells or update existing data. Note that the Action cell automatically changes its status to *UPDATE*.

You can change the file of an Attachment by typing the new filename directly in the Filename column or browse and select a file by clicking the Filename column header (Filename). (Clicking the Filename column header pops up the Open window.)
You can also change Attachment List assignment(s) of an Attachment file. For instructions refer to "Changing the Attachment List Assignment(s) of an Attachment" topic.

3. Repeat steps 1÷2 for every Attachment you want to update.
4. When finished managing the Attachments for the current Product, click the Back button (B1 cell) to go back the original Product Type Sheet from which you entered the Attachments Sheet.

Adding Attachments with the Excel Template

To add new Attachments to a Product:

1. In the Attachments Sheet, go down to the first blank row.
2. In the blank row (which will be the record for that Attachment), type-in the Attachment Attribute values for every desired Attribute (Attributes are listed by columns.). You can get a tooltip about an Attachment Type by placing the mouse pointer over the respective column header.
   Note that the Action cell changes its status to *INSERT* and a reference number for that Attachment assigns automatically in the Ref. cell. (The reference number is negative which indicates a new Attachment.)
   A tick appears in the Item Ref. cell checkbox indicating that the Attachment is assigned to the current Product.
3. Repeat steps 1÷2 for every Attachment you want to add.
4. When finished managing Attachments, click the Help button (A1 cell) to go to the Help Sheet or the Back button (B1 cell) to go back to the original Attachment Type Sheet from which you entered the Attachments Sheet.

Deleting an Attachment with the Excel Template

To delete an Attachment:

1. In the Attachments Sheet, find by reference number (in the Ref. column) and filename (Filename column) the row for the Attachment you want to delete.
2. Click the Action cell at the left of the reference number. The Action cell turns into a combo box displaying three options to choose from: *INSERT*, *UPDATE*, and *DELETE*. Select *DELETE*.

Changing the Attachment List Assignment(s) of an Attachment

To change the Attachment List(s) to which an Attachment file is assigned:

1. In the Attachments tab, in the Filename column, find the cell that contains the name of the file you want to re-assign (the "target filename cell").
2. Click and select the cell at the left-hand side of the target filename cell. (This cell should be in the Attachment List column.)
3. Click the header cell of the Attachment List column. The selected Attachment List cell turns into a list box with two buttons - OK and Cancel. The list box displays the available Attachment Lists for selecting. The Attachment Lists to which the Attachment file is currently assigned (if any) are pre-selected and highlighted.
4. In the list box, de-select and select the desired Attachment Lists as needed. (Clicking an Attachment List selects it; clicking a highlighted Attachment List de-selects it.) Multiple selections are allowed for this list.
5. Click OK to implement the changes or Cancel to discard them.

Products Import < Excel Template Folder

What Is It for?

The Products Import < Excel Template folder is used for automated import of Product Items from a previously prepared MS Excel file. The template for the file is prepared in the Products – Prepare Excel Template folder after which the appropriate data has to be filled in.

When using automated Product import, Products get mapped to their respective Product Types automatically.

What Can You Do in Products Import < Excel Template Folder?

In Products Import < Excel Template folder you can:

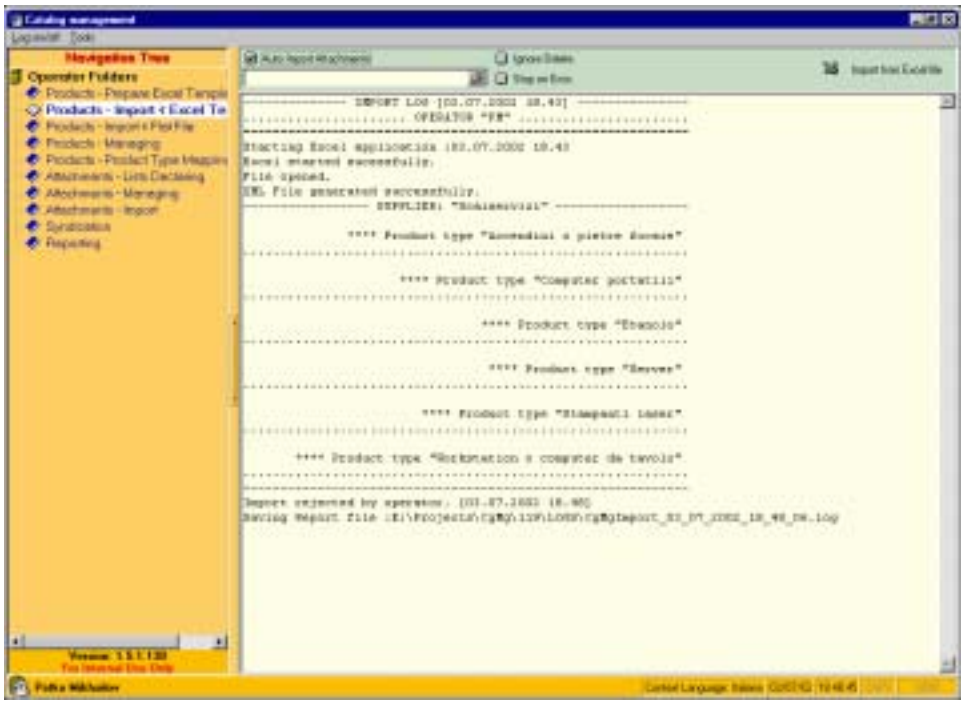
- import Products from a previously prepared MS Excel file.

How To Access Products Import < Excel Template Folder?

To access Products Import < Excel Template folder:

- From the Navigation Tree, select the Products Import < Excel Template folder. The Products Import < Excel Template screen – displays in the right frame.

The Products Import < Excel Template Screen



Auto Import Attachment *checkbox*

When checked, the attachment files in the directory listed in the attachment directory field beneath this checkbox will be imported into the System.

Attachment Directory field

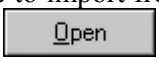
Directory for the attachment files to be imported into the System. This field is disabled until the Auto Import Attachment box gets checked.

Ignore Delete checkbox

When checked, the System will ignore the delete codes in the MS Excel file when performing the import. The delete codes are designed for updating Product Types and Product Items. Checking the Ignore Delete checkbox prevents accidental deletion of categories but may result in duplicated data.

Stop on Error checkbox

When checked, the import will stop automatically if an error occurs.

Opens the Import Excel File dialog for selecting an MS Excel File to import from. Browse and select the desired file and click the 

button to perform the import.

Products Import < Flat File Folder

The Products Import < Flat File folder is used for automated import of Product Items from a previously prepared Flat File. Typically, the Flat File has been generated through the Suppliers data management system, so the import needs to be adjusted to match the structure and the content of the Flat File. This is achieved by selecting the respective Product Attributes, arranging them in the appropriate order and selecting the text delimiter.

When using automated Product import, Products get mapped to their respective Product Types automatically.

What Can You Do in Products Import < Flat File Folder?

In Products Import < Flat File folder you can:

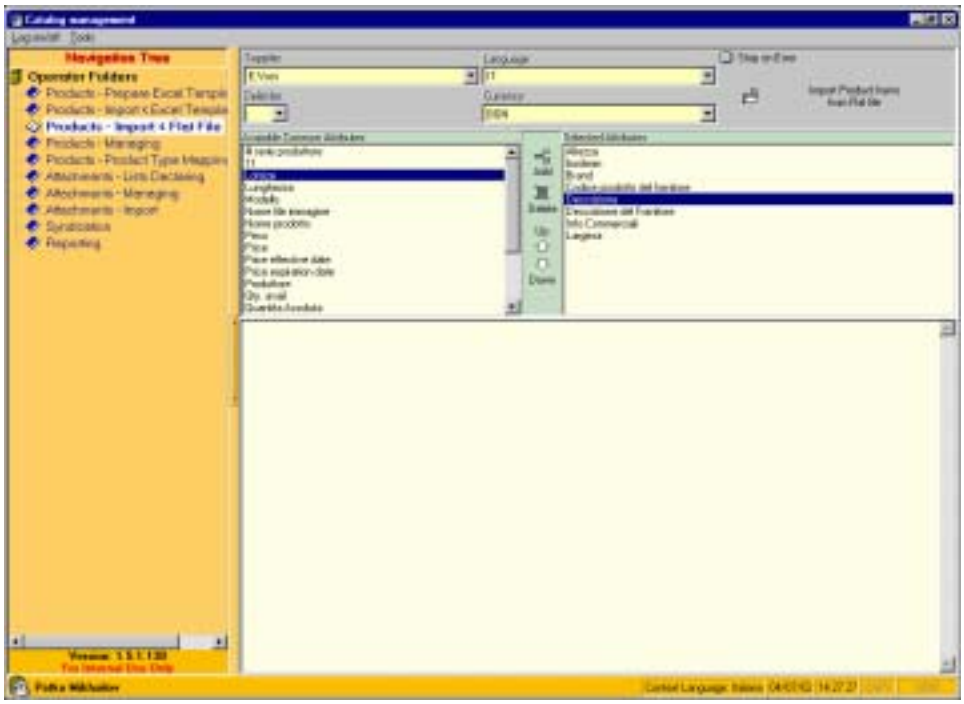
- import Products from a previously prepared Flat File.

How To Access Products Import < Flat File Folder?

To access Products Import < Flat File folder:

- From the Navigation Tree, select the Products Import < Flat File folder. The Products Import < Flat File screen – displays in the right frame.

The Products Import < Flat File Screen



Supplier *combo* *

Supplier companies available to the current Operator. The available companies are those assigned to the Operator from the Operators screen (Companies folder, Administrator interface).

Delimiter *combo* *

Character used as a text delimiting symbol in the Flat File. The options available for selection are semicolon, vertical line, and the Tab character though you can type-in and use as a delimiter any character you want.

Language *combo* *

Context and Data Language for the template. The available language choices are the ones defined in the Languages folder.

Currency *combo* *

Currency format for the values (i.e. the figures) of the currency-dependent Attributes (e.g. "Price") for the template. The available Data Currency choices are the ones defined in the Currencies folder. **If currency-dependent Attributes are to be entered through the template, be sure to make the appropriate Currency choice or the imported data is going to be incorrect and/or unusable.**

Stop on Error checkbox

When checked, the import will stop automatically if an error occurs.

Opens the Import Product Items from Flat File dialog for selecting a Flat File to import from. Browse and select the desired file and click the

button to perform the import.

Available Product Attributes *list box*

Lists the unassigned Product Attributes for selecting and adding to the Selected Attributes list box. Multiple selections are allowed for this grid – use "Ctrl + Mouse", "Shift + Mouse", or "Shift + Up/Down arrows".

Selected Attributes *list box*

Lists the attributes assigned to the import. Multiple selections are allowed for this grid – use "Ctrl + Mouse", "Shift + Mouse", or "Shift + Up/Down arrows".

Vertical Toolbar

Manages the process of assigning and arranging Selected Attributes.

Adds Attribute(s) to the import. The Attribute(s) to be added is/are the currently one(s) in the Available Product Attributes grid. The added Attribute(s) get(s) moved from the Available Product Attributes to the Selected Attributes grid.

Removes Attribute(s) assigned to the import. The Attribute to be removed is the currently selected one in the Selected Product Attributes grid. The removed Attribute(s) get(s) moved from the Selected Attributes to the Available Product Attributes grid.

Moves the current Selected Product Attributes one position up.

Moves the current Selected Product Attributes one position down.

Products – Managing Folder

What Is It for?

The Products – Managing folder is used for manual managing and updating of Products.

What Can You Do in Products – Managing Folder?

In Products – Managing Folder you can:

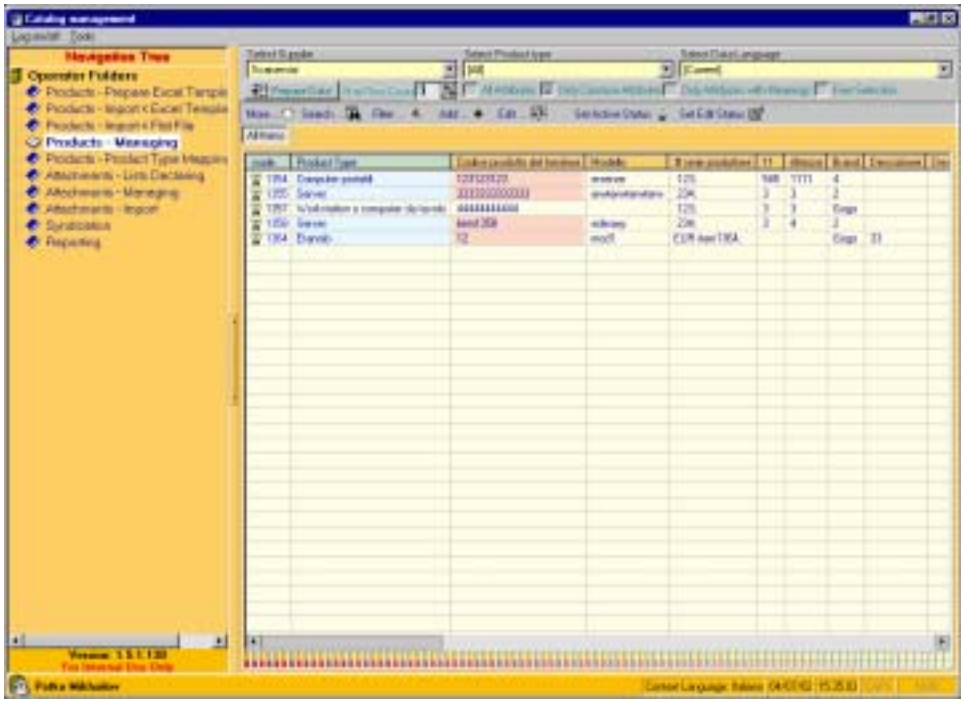
- view Products by Supplier and Product Type;
- update Products;
- manually add Products;
- change the status of a Product record.

How To Access Products – Managing Folder?

To access Products – Managing folder:

- From the Navigation Tree, select the Products – Managing folder. The Products – Managing screen displays in the right frame.

The Products – Managing Screen



The topmost part of the screen (the part above the Horizontal Toolbar) serves as a Master Record for the screen, therefore it will be referred further as "Master Form". The grid displays content matching the options chosen in the Master Form.

To display the desired content in the grid:

1. In the Master Form, choose the appropriate options.
2. Press the

button. The data matching the chosen options gets displayed in the grid. (If there are many records to be displayed, the process of may take awhile, so please be patient.)
3. If there are more records to be displayed than the number allowed by the current setting of the Max Row Count box, use the

button to display the next set of records.

Supplier *combo* *

Supplier company the products of which will be displayed in the grid upon pressing the

button. The available companies are those assigned to the Operator from the Operators screen (Companies folder, Administrator interface).

Select Product Type *combo* *

Product Type the Products of which will be displayed in the grid upon pressing the

button. The available Product Type choices are the ones assigned to the Supplier in Product Types screen (Companies folder, Administrator interface).

Select Data Language *combo* *

Data Language for the template. The available language choices are the ones defined in the Languages folder. Selecting *[CURRENT]* displays Product Attributes' values in the same language as the Operator's current Context Language.

All Attributes / Only Product Attributes / Only Attributes With Meanings / Free Selection *radio buttons*

Attributes to be displayed in the grid upon pressing the

button. Choosing the Free Selection option pops up the Attributes Selection window for manual selection of the desired Attributes.

Max Row Count *number box*

Maximum number of records to be displayed in the grid. Decreasing this number speeds up displaying data and refreshing the screen.

button

Applies the currently chosen options in the Master Form and displays the matching data in the grid.

Horizontal Toolbar

Manages the records displayed in the grid.

More ...

Displays the next set of records. The number of records in the set depends on the current setting of the Max Row Count box. Enabled when there are more records to be displayed than the current setting of the Max Row Count box allows.

Search ...

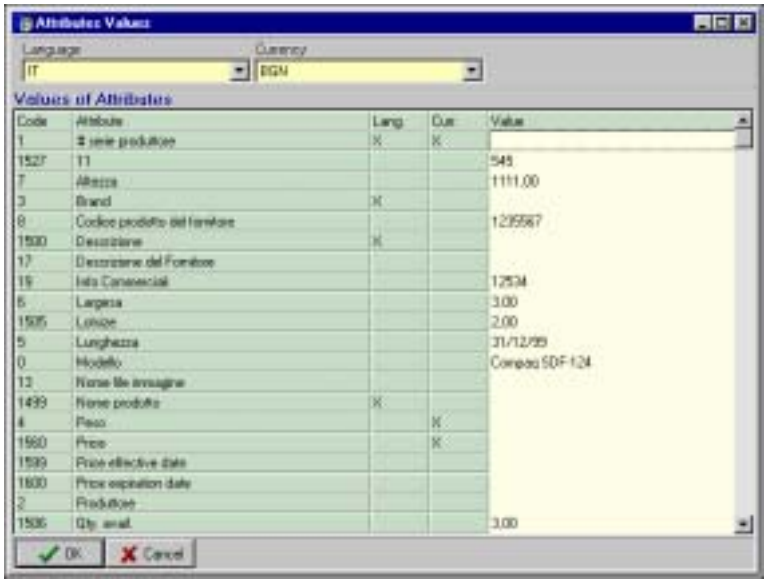
Opens the Search for Product Items window for locating a Product record in the grid

Filter ...

Opens the Search for Product Items window for filtering the Product records in the grid.

Add ...

Opens the Attributes Values pop-up window for adding a new Product record.



Type in the appropriate values in the Value column (Click the desired cell to select it, then click it again to allow editing in the cell.)

Edit ...

Opens the Attributes Values pop-up window for editing the currently selected Product record. (Refer to the explanation of the Add ... button.) You can change the values for multiple records at a time. Just select multiple Product records in the grid and click Edit ... . Now the values you type in the Attributes Values pop-up window will apply to all selected Product records. Attributes that have different Values for the selected Products records display ??? in the Value column instead of a real value.

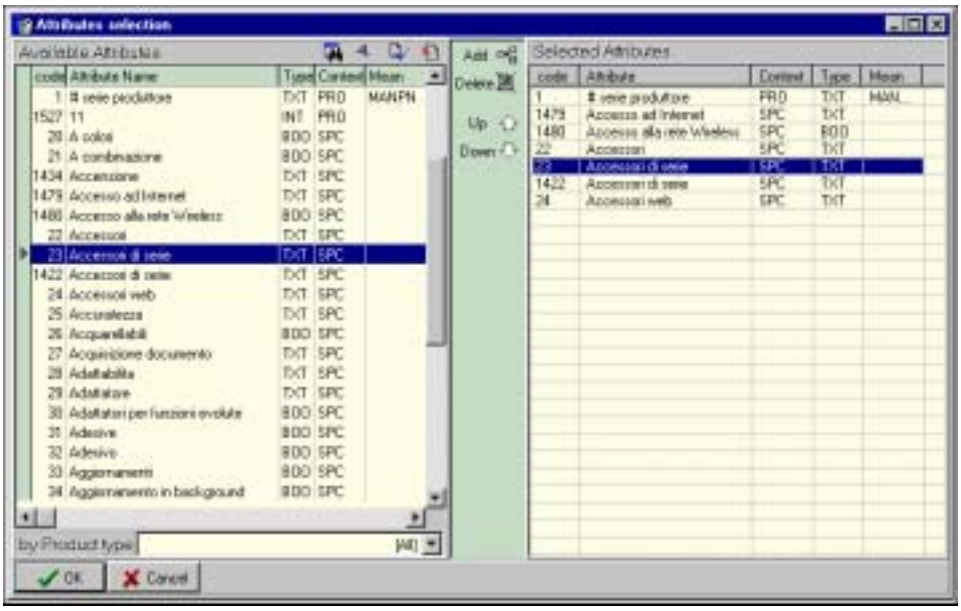
Set Active Status

Sets the status of the currently selected Product record(s) to "active" (indicated by a light bulb icon in the code cell.) Setting a Product status to "active" makes this Product available for Syndication.

Sets the status of the currently selected Product record(s) to "edit" (indicated by a pad with a pen icon in the code cell.)

Grid Lists Product records for editing/updating. Multiple selections are allowed for this grid – use "Ctrl + Mouse", "Shift + Mouse", or "Shift + Up/Down arrows".

Attributes Selection Window



The Attributes Selection window is used for manual selection of Attributes. It is accessed from the Free Selection radio button.

By Product Type *combo*

Product Type the Attributes of which are listed in the Available Attributes grid.

Available Attributes *grid*

Lists the Attributes for the selected Product Type in the By Product Type combo box. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows". The selected Available Attributes will be added to the Selected Attributes grid upon pressing the

button.

Opens the Search for Attribute pop-up dialog for locating an Attribute in the grid.

Opens the Filter window for filtering the Attributes in the grid.

Selects all Available Attributes.

Deselects all but the last selected Available Attribute.

Selected Attributes *grid*

Lists the selected Attributes. The selected Attributes will be displayed in the underlying screen. The order of the Selected Attributes is the order in which the Attributes will be displayed in the underlying screen. The Selected Attributes will be displayed in the underlying screen upon pressing the

button.

Vertical Toolbar

Manages the process of selecting and arranging Attributes.

Adds Attribute(s) to the Selected Attributes. The Attribute(s) to be added is/are the currently one(s) in the Available Attributes grid.

Removes the highlighted Attribute from the Selected Attributes.

Moves the highlighted Selected Attribute one position up.

Moves the highlighted Selected Attribute one position down.

Search for Product Items Window

The Search for Product Items window is accessed through the

button at the bottom of the Product Types screen.

The Search for Product Items window is the System's standard Search window but with some additional functionalities specific to Product Types and Product Items. These product-specific functionalities are described below. (If you need information about the standard search functionalities, refer to "Searching Records" in the 'Introduction and Overview' section of this document.)

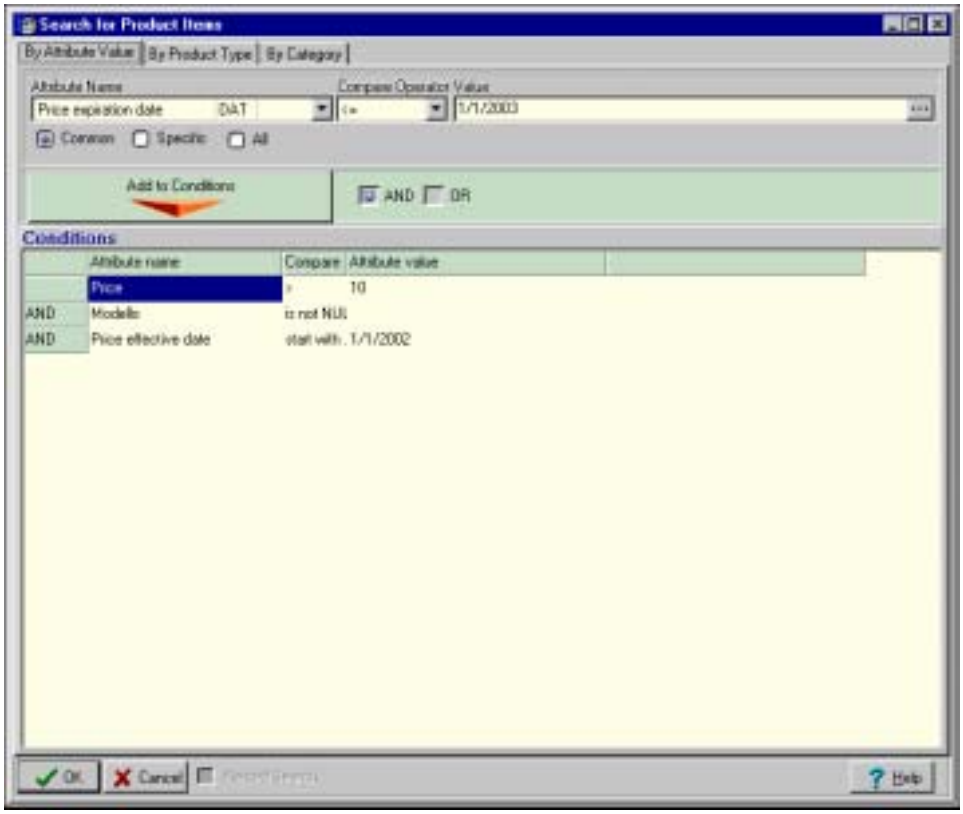
The Search for Product Items window has three tabs – each of them enabling you to search in a specific way – By Attribute Value tab, By Name and Description tab and By Category tab.

Nested Search *checkbox*

When checked, the search will be performed only within the currently selected records in the underlying screen (the screen from which you opened the Search for Product Items window). If no records have been selected in the underlying screen, this checkbox is disabled.

By Attribute Value Tab

The By Attribute Value tab allows for performing complex multi-criterial searches. The search results are displayed in a new window.



Attribute Name *combo*

Attribute for the pending search expression. (The pending search expression is the expression to be added as a Condition upon pressing the

button.) Lists Product, Specific, or all Attributes depending on the current setting of the Common/Specific/All radio buttons together with their data types.

Comparison Operator *combo*

Internal logical operator for the pending search expression. This logical operator links the Attribute Name to its Value.

Value *field*

Value for the search expression.

Common/Specific/All *radio buttons*

Type of the Attributes listed in the Attribute Name combo box. *COMMON* stands for Product Attributes, *SPECIFIC* stands for the Specific Attributes of a particular Product Type, *ALL* lists both. Upon selecting the *SPECIFIC* option, the Search for Product Type window pops up so you can find the Product Type the Specific Attributes of which you want to add. The Search for Product Type window has two tabs that follow the same logic as the By Name and Description and By Category tabs. For more information on searching using these tabs, refer to the parts of this chapter. In the Search for Product Type window, once the desired Product Type is found and selected, click the

button. The Search for Product Type window closes down and the Specific Attributes for that Product Type get listed in the Attribute Name combo box.

AND/OR *radio buttons*
External logical operator for the pending search expression. This is the logical operator (*AND* or *OR*) with which the pending search expression will be added to the Conditions grid. Once a pending expression has been added to the Conditions, its external logical operator displays in the green field at the left of the expression.

Adds the pending search expression to the Conditions grid. This button stays disabled until all required values for Attribute Name, Comparison Operator, and Value fields get in place.

Conditions *grid* Lists the search conditions for the pending search.

Searching for Product Items

To search for Product Items:

1. If appropriate, check the Nested Search box.
2. Add as many search conditions as necessary. (For information on adding search conditions, see below.)
3. Click

. The Search Results grid pops up displaying the found matches.
4. In the Search Results grid, select the appropriate match(es). Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows". You can also select and deselect all records in the grid using the

and

buttons, respectively.
5. Click

.

Adding a Search Condition

To add a Search Condition to the Conditions grid:

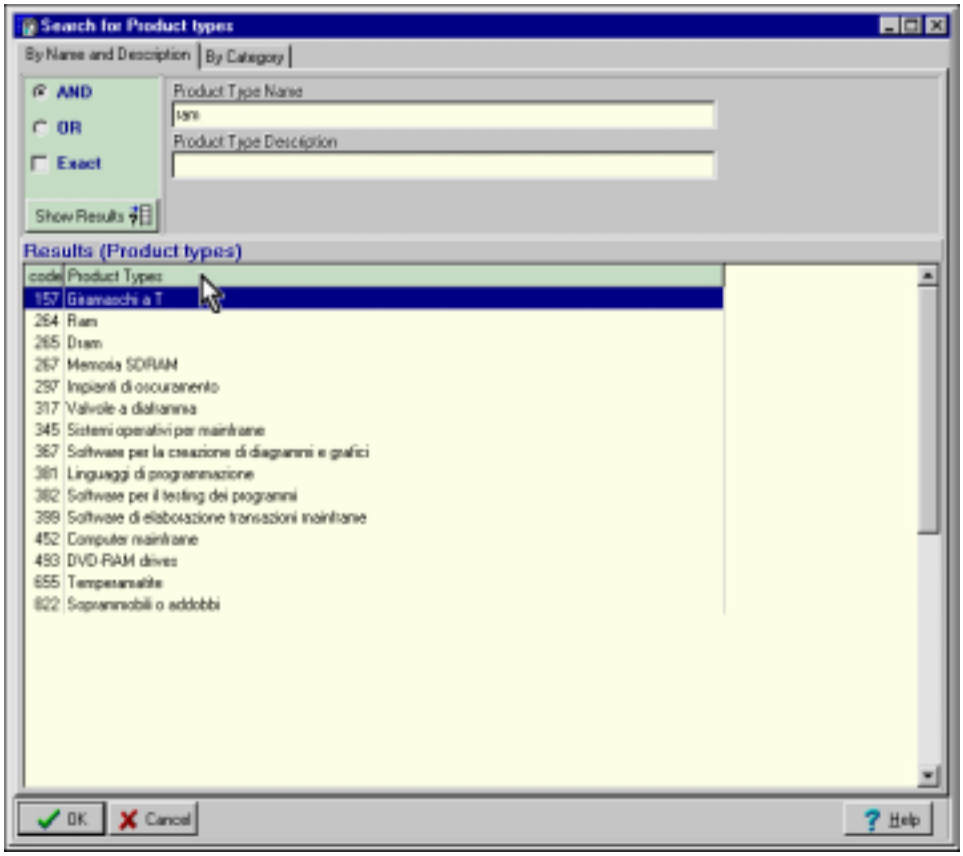
1. From the Common/Specific/All radio button set, select the appropriate option. The desired Attributes get listed in the Attribute Name combo box.
2. In the Attribute Name, Comparison Operator, and Value fields, enter the appropriate values. Once the values are properly entered, the

button gets enabled. If there are no conditions in the Conditions grid so far, skip step 3.

3. From the And/Or radio button set, select the appropriate option.
4. Click

. The condition gets added to the Conditions grid.

By Name and Description tab



Allows for searching for Product Type by Name and/or Description.

Performs the search and displays the matches found in the Results (Product Types) grid. **Do not use the**

button to perform the search

Results (Product Types) *grid*

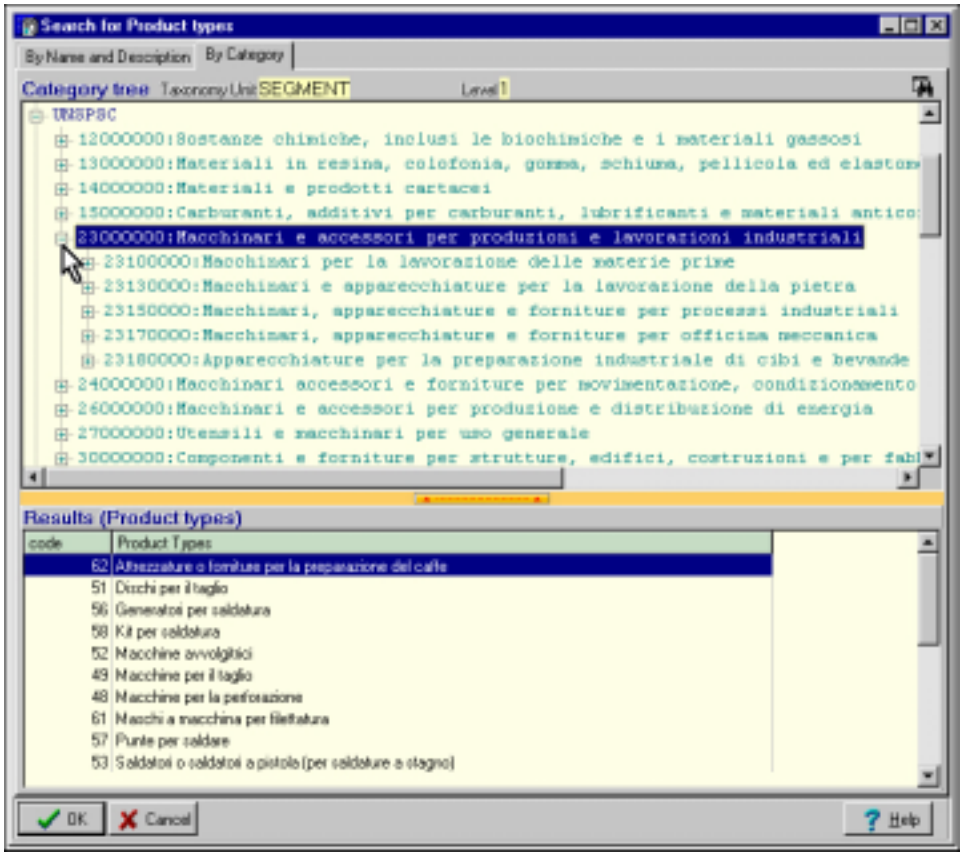
Displays the found matches for selection.

Searching in By Name and Description tab

To find a Product Type using the By Name and Description tab:

1. In the By Name and Description tab enter your search criteria as you do with any standard search. (For more information on standard searching, refer to "Searching Records" chapter.)
2. Click Show Results. The found matches get displayed in the Results (Product Types) grid.
3. In the Results (Product Types) grid, select the desired Product Type.
4. Click OK. The desired Product Type gets displayed in the Search Results pop-up grid.
5. Click OK. The Search Results pop-up grid closes and the desired Product Type gets located and highlighted in the underlying grid.

By Category tab



Allows for searching for Product Type by either navigation or keyword within a selected Classification System. The Product Types that can be

found in a specific Classification System are the ones that have been mapped to it from the Product Types – Category Mapping folder.

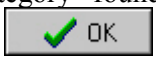
Category Tree *field*

Displays the available Product Classifications in a tree-like view. The available Product Classifications are the ones that have been entered in the Product Classification – Structure folder. Click the + sign at the left-hand side of the desired classification/branch to select and expand it. When a branch is selected, the Product Types assigned to that branch get listed in the Results (Product Types) grid.

Results (Product Types) *grid*

Displays the Product Types assigned to the currently selected branch in the Category Tree field. Click the desired Product Type to select it.

grid header button

Searches and locates a category within the current classification in the Category Tree field. (For this search, it doesn't matter exactly which level and branch of the classification is selected as the search is always performed within the entire classification; the only requirement is that **a selection should be made within the desired classification**). Useful for large classifications (like UNSPSC) that have too many categories to be browsed and found manually by scrolling. When clicked, the Search for Category window pops-up. In the Search for Category window, you are provided with options to search by Category Code and/or Category Name, as well as to limit the search to a certain level of the classification. The category found is displayed in a new Search Results grid. Click 

and the category will be located and highlighted in the Category Tree field.

Products – Product Type Mapping Folder

What Is It for?

The Products – Product Type Mapping folder is used for manual mapping of Products to Product Types. Manual mapping is necessary when a Product has been added manually from the Products – Managing folder. Products entered in the System through file import (from MS Excel or Flat File) are mapped to their respective Product Types automatically and does not require manual mapping.

What Can You Do in Products – Product Type Mapping Folder?

In Products – Product Type Mapping folder you can:

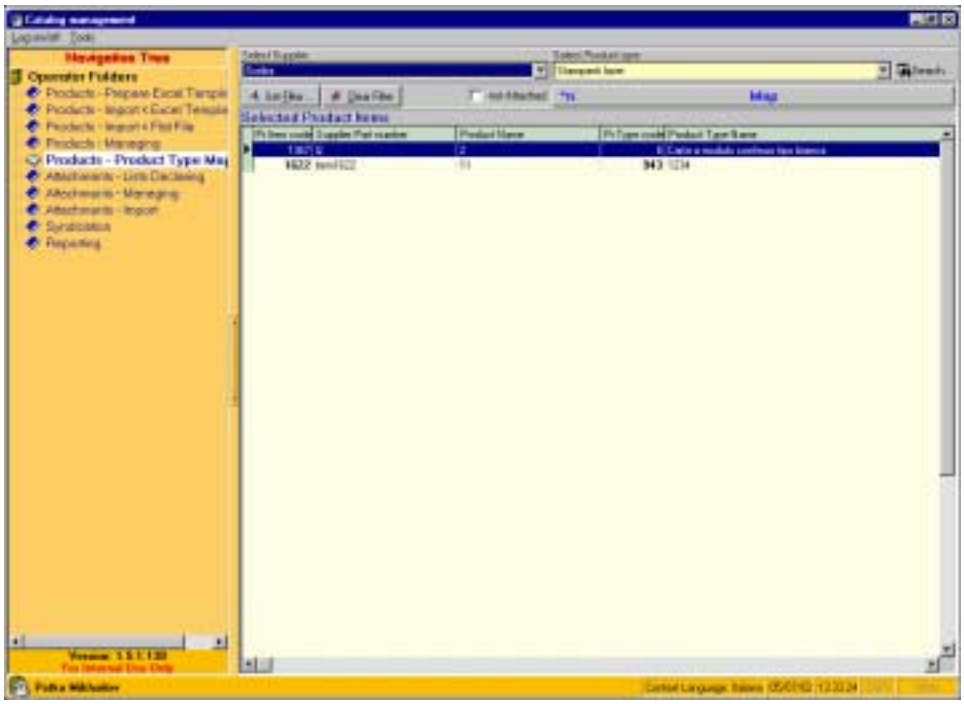
- view, per Supplier, the existing Product-to-Product-Type mappings;
- view the unmapped Products of a Supplier;
- map Products to Product Types.

How To Access Products – Product Type Mapping Folder?

To access Products – Product Type Mapping folder:

From the Navigation Tree, select the Products – Product Type Mapping folder. The Products – Product Type Mapping screen displays in the right frame.

The Products – Product Type Mapping Screen



MASTER FORM

Select Supplier *combo* *

Supplier the Products of which are listed the Selected Product Items grid.

Select Product Type *combo* *

Product Type to be mapped to the current Selected Product Item(s) upon pressing the Map button. Lists the Product Types for the currently selected Supplier in the Select Supplier combo.

Search...

Opens the Search for Product Types window for searching within the listed Product Types in the Select Product Type combo box. For more information on using this window, refer to 'By name and Description Tab' and 'By Category Tab' parts of "Search for Product Items" chapter.

Set Filter ...

Opens the Search for Product Items window for filtering the records in the Selected Product Items grid. For more information on using this window, refer to "Search for Product Items" chapter.

Clear Filter

Cancels filter and displays all records (Use it after a filter has been applied to the Selected Product Items grid records and you want to see all records anew).

Not Mapped *combo*

When checked, displays only unmapped Product Items in the Selected Product Items grid.

Maps the currently selected Product(s) in the Selected Product Items grid to the currently selected Product Type in the Select Product Type combo box.

DETAIL GRID

Selected Product Items *grid*

Lists Products according to the options set in the Master Form. The listed products can be selected and mapped. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

Attachments – List Declaring Folder

What Is It for?

The Attachments – List Declaring folder is used for is used for declaring Attachment Lists. Once declared, Attachment Lists are managed from the Attachment List Management window, Attachments – Managing folder.

What Can You Do in Attachments – List Declaring Folder?

In Attachments – List Declaring folder you can:

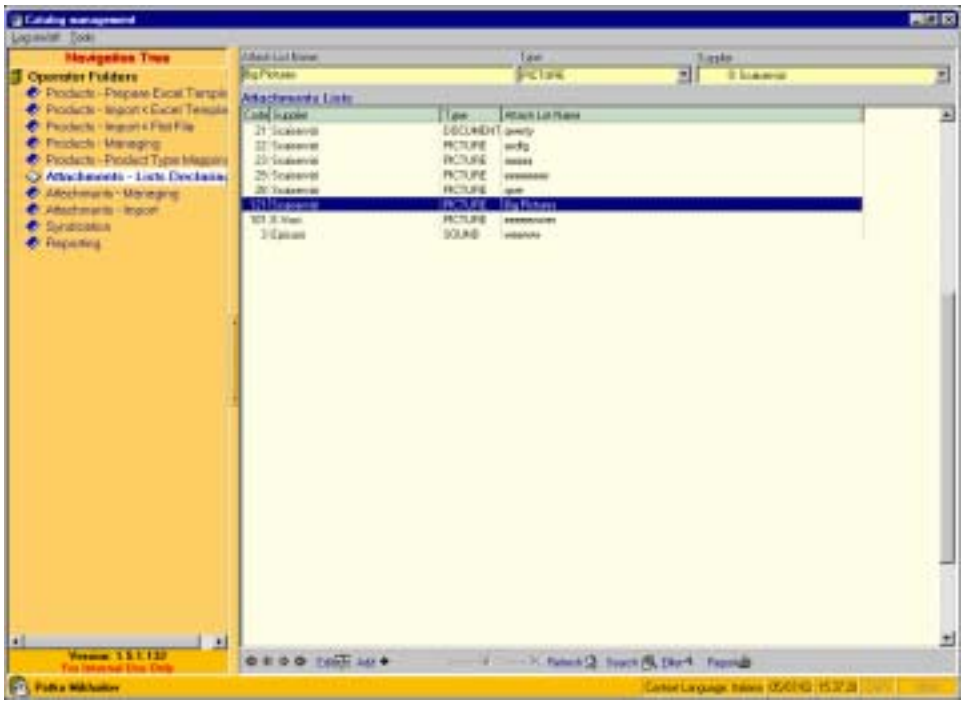
- declare new Attachment Lists;
- modify existing Attachment Lists.

How To Access Attachments – List Declaring Folder?

To access Attachments – List Declaring folder:

- From the Navigation Tree, select the Attachments – List Declaring folder. The Attachments – List Declaring screen displays in the right frame.

The Attachments – List Declaring Screen



MASTER GRID

Attachment Lists *grid*

Displays the declared Attachment Lists.

DETAIL FORM

Attachment List Name *field* *

Name of the currently selected Attachment List.

Supplier *combo* *

Supplier for the currently selected Attachment List. The listed Suppliers are those assigned to the current Operator.

Type *combo* *

Type of the Attachments in the current List.

Attachments – Managing Folder

What Is It for?

The Attachments – Managing folder is used for managing attachments and Attachment List content.

What Can You Do in Attachments – Managing Folder?

In Attachments – Managing folder you can:

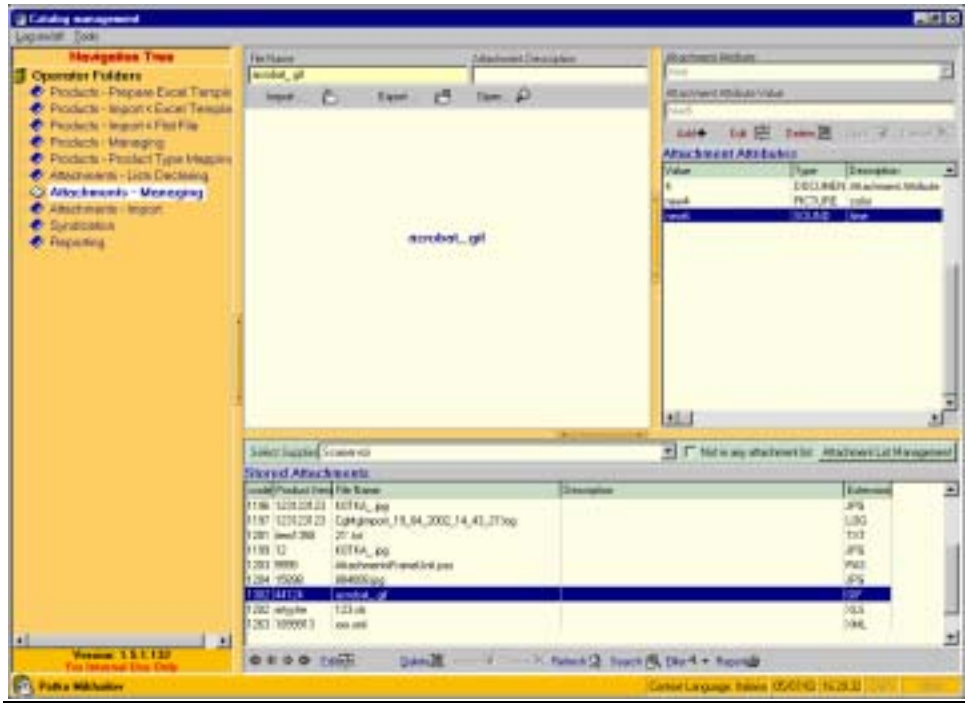
- update attachments;
- remove attachments from the System;
- manage the Attachment Attributes of a particular attachment;
- manage Attachment List content.

How To Access Attachments – Managing Folder?

To access Attachments – Managing folder:

- From the Navigation Tree, select the Attachments – Managing folder. The Attachments – Managing screen in the folder displays in the right frame.

The Attachments – Managing Screen



Master Form

Select Supplier *combo*

Supplier the Stored Attachments of which are listed. The listed Suppliers are those assigned to the current Operator.

Not in Any Attachment List *checkbox*

When checked, the Stored Attachments grid displays only the attachments not assigned to any Attachment List.

Opens the Attachment List Management window for managing the Attachment Lists for the current Supplier. If you want to add attachments to Attachment Lists, select the desired attachments in the Stored Attachments grid first.

Stored Attachments *grid*

Lists the attachments for the currently selected Supplier in the Select Supplier combo box. The details for the currently selected Stored Attachment are displayed in the Detail Form. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows". The selected attachments will be available for assigning to Attachment Lists in the Attachment List Management window.

Detail Form

Left Sub-Frame

File Name *field* *

File name of the current Stored Attachment.

Attachment Description *field*

Description of the current Stored Attachment.

Imports attachment file for replacing the current Stored Attachment. Used for updating attachments.

Saves a copy the current Stored Attachment file outside the System.

Opens the current Stored Attachment file in the default application associated with the attachment's file type.

Right Sub-Frame

Attachment Attributes *grid*

Lists the Attachment Attributes assigned to the current Stored Attachment. The currently selected Attachment Attribute displays in the Attachment Attribute combo and Attachment Attribute Value field.

Attachment Attribute *combo*

Name for the currently selected Attachment Attribute. The available options are the Attachment Attributes defined in the Attributes of Attachments folder, Administrator interface.

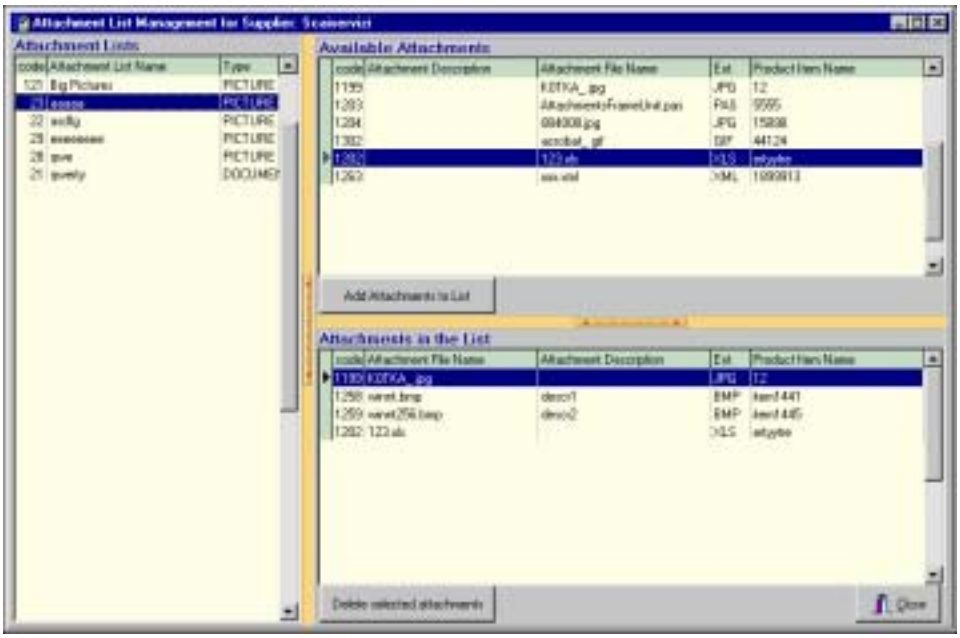
Attachment Attribute Value *field*

Value for the currently selected Attachment Attribute.

Right Sub-Frame Toolbar

Manages the Attachment Attributes of the current Stored Attachment.

Attachment List Management Window



Attachment Lists *grid*

Displays the Attachment Lists for the current Supplier. The name of the current Supplier is listed in the window frame. The available Attachment Lists are those defined for the Supplier in the Attachments – List Declaring folder.

Attachments in the List *grid*

Displays the Attachments in the current Attachment List. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

Delete selected attachments

Removes the selected attachments in the Attachments in the List grid from the current Attachment List.

Available Attachments *grid*

Displays the attachments that have been selected in the Stored Attachments grid upon opening the Attachment List Management window. The selected attachments in this grid can be added to

the current Attachment List by clicking the

button. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

Adds the selected Available Attachments to the current Attachment List.

Attachments – Import Folder

What Is It for?

The Attachments – Import Folder is used for importing Attachments together with their Attribute values. The import is executed from a previously prepared Flat File. All Attachment files to be imported must reside in one folder; the Flat File itself can reside anywhere.

What Can You Do in Attachments – Import Folder?

In Attachments – Import folder you can:

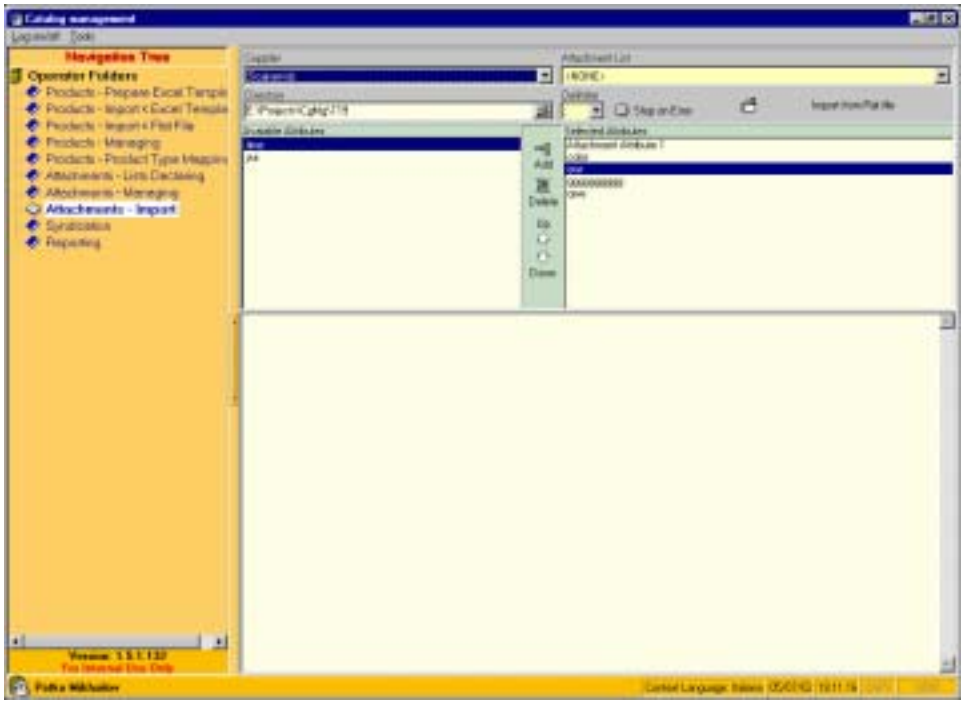
- import attachments from a Flat File.

How To Access Attachments – Import Folder?

To access Attachments – Import folder:

- From the Navigation Tree, select the Attachments – Import folder. The Attachments – Import screen displays in the right frame.

The Attachments – Import Screen



Supplier *combo* *

Supplier for which Attachments will be imported. The listed Suppliers are those assigned to the current Operator.

Directory *field*

Directory where the attachment files to be imported reside.

Attachment List *combo* *

Attachment List to which the Attachments will be imported. Lists all Attachment Lists defined in Attachments – List Declaring folder.

Delimiter *combo* *

Character used as a text-delimiting symbol in the Flat File. The options available for selection are semicolon, vertical line, and the Tab character though you can type-in and use as a delimiter any character you want.

Stop on Error *checkbox*

When checked, the import will stop automatically if an error occurs.

Available Attributes *grid*

Lists the Attachment Attributes defined for the currently selected Attachment List.

Selected Attributes *grid*

Attachment Attributes selected for the import.

Vertical Toolbar

Manages the process of selecting and arranging Attributes.

Opens the Import Attachments from Flat File dialog for locating and selecting a Flat File to import. Browse and select the desired file, then click

to start the import.

Syndication Folder

What Is It for?

The Syndication folder is used for performing Syndication. The Syndication folder screens provide you with options to select a Supplier for the syndication, Record Format for the syndicated data, Publisher for which the data is prepared, and the desired syndicated content.

What Can You Do in Syndication Folder?

In the Syndication folder you can:

- perform syndication for a particular Supplier.

How To Access the Syndication Folder?

To access Syndication folder:

- From the Navigation Tree, select the Syndication folder. The first screen in the folder – Initial Syndication Parameters – displays in the right frame.

The Syndication Screens

Vertical Toolbar

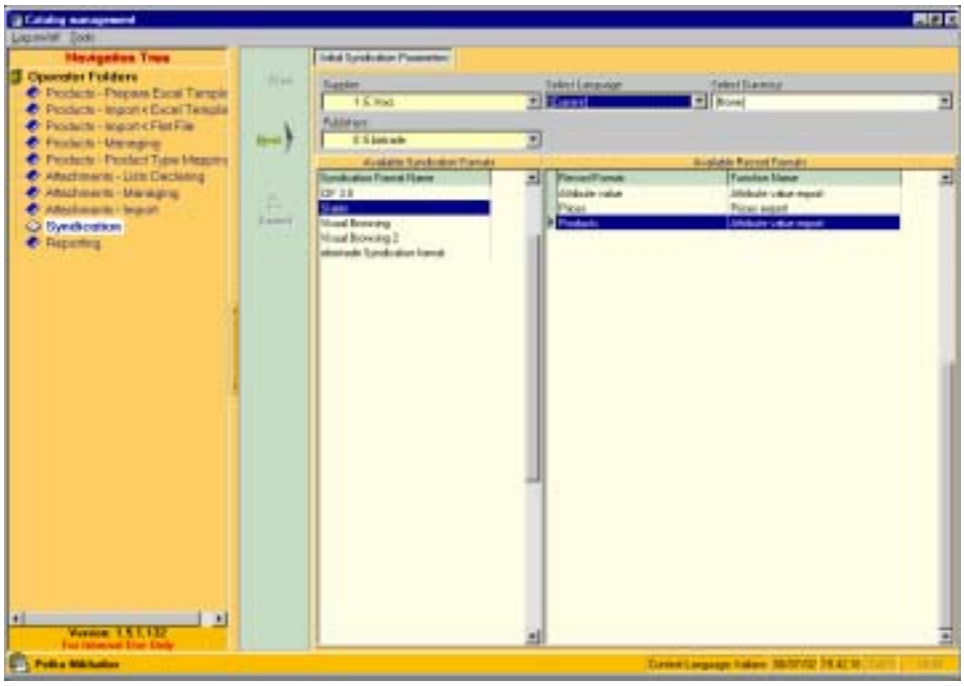
Manages the syndication process.

Applies the options selected in the current screen and takes you to the next step of the process.

Takes you back to the previous step of the process.

Performs the syndication.

Initial Syndication Parameters Screen



Supplier *combo* *

Supplier for which syndication is done. Lists the Supplier companies available to the current Operator. The available companies are those assigned to the Operator (from the Operators screen, Companies folder, Administrator interface).

Publishers *combo* *

Target Publisher for the syndication. Lists the Publishers assigned to the current Supplier (from the Publishers screen, Companies folder, Administrator interface).

Select Language *combo*

Language of the syndicated data. The available language choices are the ones defined for the current Publisher (in Publishers folder, Administrator interface). Selecting *[CURRENT]* selects the Operator's current Context Language.

Select Currency *combo*

Currency format for the values (i.e. the figures) of the currency-dependent Attributes (e.g. "Price"). The available Select Currency choices are the ones defined in the Currencies folder plus *[NONE]*. *[NONE]* is the default value and is used when import of currency-dependent Attributes is not intended. **If currency-dependent Attributes are going to be used, be sure to make the appropriate Data Currency choice or the syndicated data is going to be incorrect and/or unusable.**

Available Syndication Formats *grid*

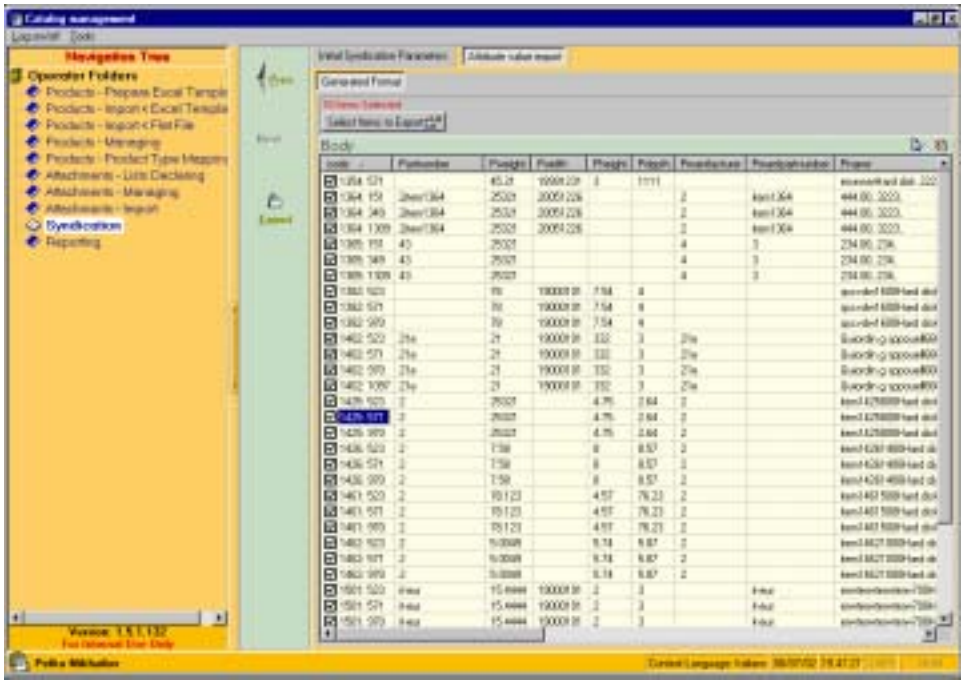
Lists the available Syndication Formats for selection. The available Syndication Formats are those assigned to the current Publisher (Publishers folder, Administrator interface). The

highlighted Available Syndication Format is the one to be used for the syndication. Click on the desired Available Syndication Format to select it. Upon selecting a Syndication Format, the Record Formats defined for that Syndication Format get listed in the Available Record Formats grid.

Available Record Formats *grid*

Lists the Record Formats for selection. The available Record Formats are those assigned to the current Syndication Format (Syndication Formats folder, Administrator interface). The highlighted Available Record Format is the one to be used for the syndication. Click on the desired Available Record Format to select it. Multiple selections are allowed for this grid – use "Ctrl + Mouse" or "Shift + Up/Down arrows".

Attribute Values / Prices Export Screen



This screen displays as a second-step screen in the syndication process when the selected Record Format(s) use(s) either the Attribute Value Export or the Prices Export functions. (The function in use displays next to the Record Format name in the Available Record Formats grid, Initial Syndication Parameters screen.)

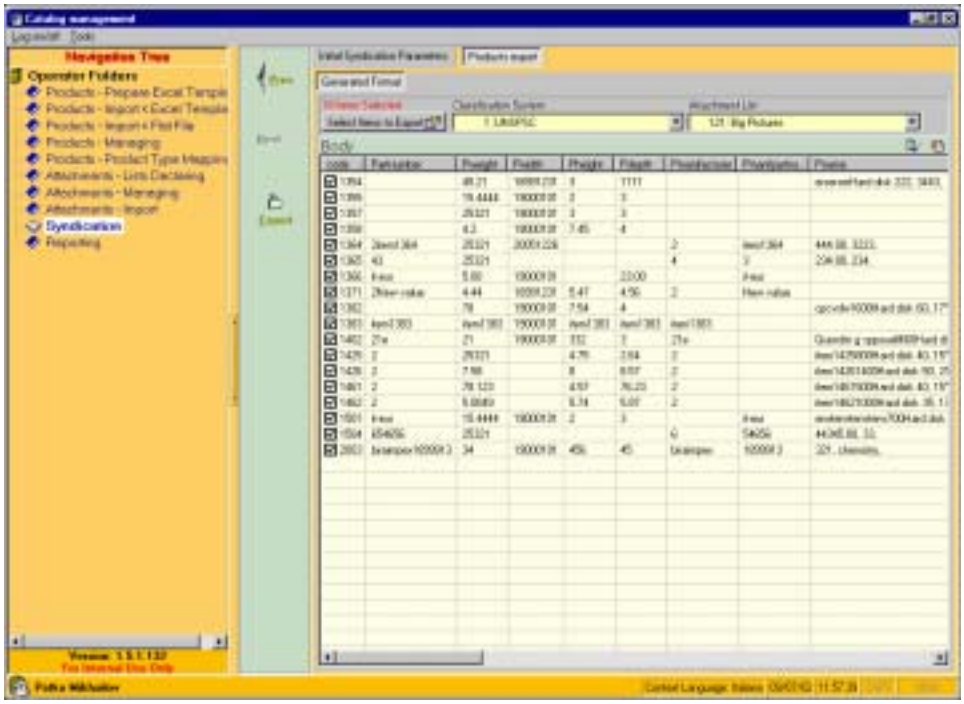
Opens the Search for Product Items window for finding and selecting the items to be syndicated. For more information, refer to "Search for Product Items Window chapter".

Body *grid* Lists the items found by using the Select Items to Export button. The checked items will be syndicated upon pressing the Export button.

grid button Checks all items listed in the Body grid.

grid button Clears all items listed in the Body grid.

Products Export Screen



This screen displays as a second-step screen in the syndication process when the selected Record Format(s) use(s) the Products Export function. (The function in use displays next to the Record Format name in the Available Record Formats grid, Initial Syndication Parameters screen.)

Select Items to Export

Opens the Search for Product Items window for finding and selecting the desired items to be syndicated.

Classification System *combo* *

Product Classification to be used for the syndication. The available choices are the Classification Systems assigned to the current Supplier in the Classification Systems screen, Companies folder, Administrator interface.

Attachment List *combo* *

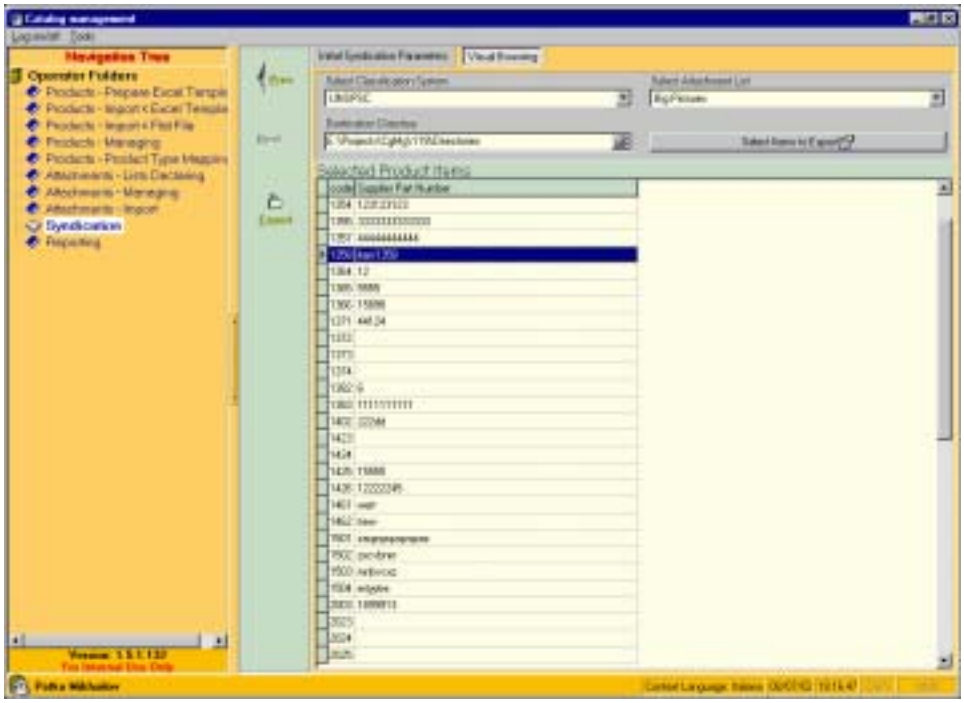
List of attachments to be included in the syndication. The available choices are the lists defined for the current Supplier in Attachments – Lists Declaring folder.

Body *grid* Lists the items found by using the Select Items to Export button. The checked items will be syndicated upon pressing the Export button.

grid button Checks all items listed in the Body grid.

grid button Clears all items listed in the Body grid.

Visual Browsing Screen



This screen displays as a second-step screen in the syndication process when the selected Record Format(s) use(s) the Visual Browsing function. (The function in use displays next to the Record Format name in the Available Record Formats grid, Initial Syndication Parameters screen.) The Visual Browsing format exports syndicated data in .xml file format.

Select Classification System *combo*

Product Classification to be used for the syndication. The available choices are the Classification Systems assigned to the current Supplier in the Classification Systems screen, Companies folder, Administrator interface.

Select Attachment List *combo*

List of attachments to be included in the syndication. The available choices are the lists defined for the current Supplier in Attachments – Lists Declaring folder. **The Visual Browsing function requires image-type files in the Attachment List.**

Destination Directory *field*

Destination folder for the syndication export. The syndication export will create two child folders in the Destination Directory – one for the .xml files (called *XML*) and one for the images in the Attachment List (called *IMAGES*).

Opens the Search for Product Items window for finding and selecting items in the Select Product Items grid. For more information, refer to "Search for Product Items Window chapter".

Select Product Items *grid*

Lists the Product Items of the current Supplier. The selected items will be syndicated upon pressing the

button.

Performing Syndication

Performing Syndication Using One Record Format

To perform syndication with one record format:

1. In the Initial Syndication Parameters screen, Syndication folder, select the appropriate Supplier. The Publishers assigned to that Supplier get listed in the Publishers combo.
2. From the Publishers combo, select the appropriate Publisher. The Syndication Formats in use for that Publisher, get listed in the Available Syndication Formats grid.
3. If necessary, Select Language and Select Currency.
4. In the Available Syndication Formats grid, select and highlight the appropriate Syndication Format. The Record Formats for that Syndication Format get listed in the Available Record Formats grid.
5. In the Available Record Formats grid, select and highlight the desired Record Format.
6. From the Vertical Toolbar, click the

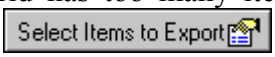
button to go to the next screen.

7. In the next screen, select the appropriate options, if such options are available. (Refer to the respective screen description if you need more information.)
8. Select the desired items in the grid. (If the grid is blank, use the Select Items to Export button to find and choose the desired items, then click Next to display them in the grid; if you are in the Visual Browsing window and the grid has too many items to be found manually by scrolling, use the Select Items to Export button to locate the desired items in the grid.)
9. Click Export. (If this button is disabled, click Next to enable it.) Unless you are in the Visual Browsing screen, the Save as dialog pops up prompting you for a name and location for the export files. Choose appropriate name and location and click Save. The System executes the syndication export and a log for the export displays on the screen.

Performing Syndication Using Multiple Record Formats

To perform syndication with multiple record formats:

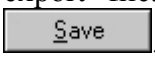
1. Execute steps 1÷4 as described in the "Performing Syndication Using One Record Format" procedure.
2. In the Available Record Formats grid, select and highlight the desired Record Formats. (To make multiple selections, use "Ctrl + Mouse" or "Shift + Up/Down arrows".)
3. From the Vertical Toolbar, click the Next button to go to the next screen. The export screen for the first selected record format displays in the right frame.
4. Select the appropriate options, if such options are available. (Refer to the respective screen description if you need more information.)
5. Select the desired items in the grid. (If the grid is blank, use the Select Items to Export button to find and choose the desired items, then click Next to display them in the grid; if you are in the

Visual Browsing window and the grid has too many items to be found manually by scrolling, use the 

button to locate the desired items in the grid.)

6. Click

. (If this button is disabled, click

to enable it.) Unless you are in the Visual Browsing screen, the Save as dialog pops up prompting you for a name and location for the export file. Choose appropriate name and location and click 

. The System executes the syndication export and takes you to the export screen for the next selected Record Format.
7. Repeat steps 4÷6 for each selected Record Format. After exporting the content for the last selected Record Format, a log for the export displays on the screen.

Reporting Folder

For information on reporting, refer to the 'Introduction and Overview' section, "General Functionalities of the System" chapter, the Reporting part.

Glossary

Account
: See "User (Account)".

Administrator
: User of the System whose main responsibilities are related to maintaining the Metadata in the System. For more information refer to the "System's Users" chapter in the 'Introduction and Overview' section.

Attachment Attributes
: See "Attributes of Attachments".

Attachment List
: List with file names of attachment files prepared for publishing to a particular Publisher.

Attribute Context
: Of Attributes of Product Types: Scope (applicability) of an Attribute with regards to the entire range of Product Types. The existing Attribute Contexts are PRODUCT and SPECIFIC. Product Attributes are universally applicable to all Product Types (i.e. all Product Types have them). Specific Attributes are Attributes that are not applicable to at least one Product Type. Do not confuse "Product Type Attributes" (= "Attributes of Product Types") with "Product Attributes" (= "Product Type Attributes with PRODUCT Attribute Context"). As explained above, the latter is a subset of the former. Examples of Product Attributes are "Brand" and "Model". Example of a Specific Attribute is "Storage Capacity" of the Product Type "Hard Disk".

Attribute — An abstract category assigned to a Product Type or Attachment type to designate a prominent aspect or a characteristic feature of that Product Type or Attachment. Examples: the Product Type "Hard Disk" can have Attributes "Storage Capacity" and "Random Access Time"; the Product Type "Color TV Set" can have the Attribute "Number of Channels"; all Product Types have the Attribute "Model"; sound file Attachments can have the Attribute "Duration", etc. About Attributes of Product Type, see also "Attribute Context".

Category — See "Classification Category".

Category Tree — The hierarchical levels of a Classification System displayed in a tree-like visual form.

Classification — See "Classification System".

Classification Category — The smallest division in a Classification System. A Classification Category is the smallest common denominator of Products in Classification System. It designates a number of Products grouped together by a similarity of structure, usage, or industry branch. Products relate to Categories in a Classification System in the same way as they relate to Product Types in the CMS. This allows for mapping of Product Types to Classification Categories in the CMS.

Classification System — A schema that classifies and identifies commodities (products). A Classification System includes identifiers, hierarchical levels, titles, definitions, and version control information.

CMS — The name the current system (acronym for "Catalog Management System"), referred to as "the System" for short.

Context Language — Language of the Metadata in the System. See also "Metadata", "Data", and "Data Language".

Current Condition — In the Filter pop-up window, the current settings for Field, Comparison Operator, and Value. The Current Condition will be added as a search expression in the Conditions Entered area upon pressing the

button.

Current Filter — In the Filter pop-up window, the filtering expressions entered in the Conditions Entered area. This is the filter that will be applied against the data in the underlying screen.

Data — In the System, the values (content) of Attributes, be they Product or Attachment Attributes. See also "Metadata".

Data Language — Language in which language-dependent Data entries are displayed. The System stores separate language versions of each

language-dependent Data entry for all Languages declared in the System. See also "Context Language".

Derived Attribute
: Attribute assigned to a record format with an alias name. Deriving Attributes makes possible for existing Attributes to comply with Publishers' Record Formats. There are two types of Derived Attributes - simple and complex. Simple Derived Attributes are assigned to the Record Format by just declaring the alias name. Complex Derived Attributes are assigned through a function. If that function is *PTYPEATTRCONC*, the Attribute is a Complex Concatenated Derived Attribute or a Derived Field. See also "Derived Field".

Derived Field
: Derived Attribute created through the *PTYPEATTRCONC* function. Derived Fields comprise several Attributes concatenated together by pre-defined Syndication Rules.

Detail Form
: Form displaying information about the currently selected record in the grid to which the form refers. In some rare cases the form may refer to a combo box instead of a grid.

Edit Mode
: Operation Mode for (a part of) the current screen allowing for modifications to the current record.

Fields, Derived
: See "Derived Field".

Flat File
: File in Text Delimited Format (that is, separated by commas, semicolons, or other characters). Allows for transfer of structured information as the Flat File keeps data in pseudo-table form.

Forms, Detail
: See "Detail Form".

Format (of a Record)
: See "Record Format".

Interface Language
: Language in which the System's interface is written. The interface language is unchangeable and independent of the System's Data and Context Languages. See also "Data Language" and "Context Language".

Language - Interface, Context, Data
: See "Interface Language", "Context Language", and "Data Language", respectively.

Master Grid
: A grid that controls an associated Detail Form. Selecting a record in the Master Grid causes the Detail Form to display content for that record. See also "Detail Form" and "Master Record".

Master Record
: The currently selected and highlighted record in a Master Grid.

Metadata — In the System, the Product Types, Classification Categories, and Attribute Names. These are categorical-type entries that serve as "containers" for the Data. See also "Data".

Modes - Edit, View
Refer to "Edit Mode" and "View Mode", respectively.

Navigation Tree
A tree-like structure in the System's left pane metaphorically representing the System's screens as folders. Use it to Navigate through the System in the same way you do in Windows Explorer.

Operator — User of the System whose main responsibilities are related to working with the Data in the System. For more information refer to the "System's Users" chapter in the 'Introduction and Overview' section.

Product — Commodity offered for sale. In the System's terminology, Product and Product Item are used interchangeably. Products in the System are grouped in Product Types.

Product Attribute
See "Attribute Context".

Product Classification
See "Classification System".

Product Item — See "Product".

Product Record
All information about a particular Product Item stored in the System.

Product Type — A grouping of equivalent or similar Products declared in the System with a unique name, e.g. "Printers". Product Type is the category that organizes the Products in the System. See also "Product".

Publisher — Target for the syndication output. Can be electronic or print catalog, company web site, web shopping mall, or procurement system, etc..

Publishing Manager
Provider of publishing services. The Publishing Manager is usually a company, not a person.

Record Format
A set of rules defining labeling and arranging syndicated data output to a particular Publisher. Record Formats must comply to the requirements provided by the Publishing Manager for that Publisher.

Record, Master
See "Master Record".

Report — Report document generated by the System containing data output. Reports are the output documents generated by Report Templates.

Report Template — Template for generating report output (i.e. reports). Report Templates define the scope of data to be included in Reports. See also "Report".

Screen — In this document, the term "screen" refers to the content of the right frame of the System's interface. See also "Navigation Tree".

Security Manager — User of the System whose responsibility is to maintain the other Users. For more information refer to the "System's Users" chapter in the 'Introduction and Overview' section.

Specific Attribute — See "Attribute Context".

Standard Meaning (of an attribute) — Name under which an Attribute can be recognized by the Publishing Manager's system. Mapping to the respective Standard Meanings is mandatory for some Attributes or the System will not syndicate data properly.

Syndication — The process of extracting the desired data from the System and converting it in output format appropriate for a particular Publisher.

Syndication Format — A set of Record Formats grouped together under a common name.

Syndication Record — A single record in the syndication output. A Syndication Record contains the syndicated data about a particular Product. Each Syndication Record refers to one Product.

System — See "CMS".

Taxonomy Unit — In this System: Named hierarchical level of a Product Classification. See also "Classification System".

The System — See "CMS".

Types of Users — Refer to the "System's Users" chapter in the 'Introduction and Overview' section.

UNSPSC — Universal Standard Products and Services Classification. Developed and maintained by the Electronic Commerce Code Management Association (ECCMA).

User (Account) — Account for a particular person with the System established to provide appropriate form of access for that person to the System.

User Types	Refer to the "System's Users" chapter in the 'Introduction and Overview' section.
View Mode	Operation Mode for (a part of) the current screen in which data is displayed but cannot be changed (as opposed to "Edit Mode" (see)).

Ariba Record Formats

The Ariba Record Formats in use with the System are three; for each Record Format the tables show the field features and the requirements describe related rules.

List of tables:

- Ariba Product Record Format
- Ariba Price Record Format
- Ariba Attribute Values Record Format

Each import Record Format has the following rules:

- file format: TXT
- fields separator : |
- end record: |\r\n

Ariba Product Record Format

Record Format Fields (the order shown is mandatory)

Order	Field Name	Type / Length	Null	Default	Field Description
1	Partnumber	String / 75	Not null		Internal part number; Ariba uses this code for catalog punchout
2	Pweight	number / 16,6	Not null	00	Product weight
3	Pwidth	number / 16,6	Not null	00	Product width
4	Pheight	number / 16,6	Not null	00	Product height
5	Pdepth	number / 16,6	Not null	00	Product depth
6	Pmanufacturer	String / 100	Not null		Manufacturer of product
7	Pmanfpartnumber	String / 75	Not null		Manufacturer's part number
8	Pname	String / 255	Not null		Short description of product
9	Pdescription	String /	null		Long description of product

		3000			
10	Pcategoryname	String / 3000	Not null		Product category path; rule adopted by Statim today: concatenate= "Cataloghi" +Pdelimiter +Pmanufacturer
11	Paction	Numbe r / 1	Not null	0	Product action code
12	Punitofweight	String / 20	Not null	lbs.	Product weight unit name
13	Punitofdepth	String / 20	Not null	in.	Product depth unit name
14	Punitofheight	String / 20	Not null	in.	Product height unit name
15	Punitofwidth	String / 20	Not null	in.	Product width unit name
16	Pdelimiter	String / 1	Not null	\	Delimiter used in categorypath field
17	Ptname	String / 250	Null		Name of product type
18	Providerdomain	String / 250	Null		Domain of product type
19	Providerid	String / 50	Null		ID of the provider
20	Picture	Long / raw	Null		Full directory path and name of file that contains the product image
21	Picturename	String / 765	Null		Name of image file

Record Format Requirements

Partnumber — Map to the Internal part number; suggested rule: *concatenate= Pmanufacturer+ Pmanfpartnumber*. Must be unique across all products in an Ariba Marketplace. Must be more than two characters in length.

Pweight — Map to the weight of the product. The number must have "dot" as decimals separator.

Pwidth — Map to the width of the product. The number must have "dot" as decimals separator.

Pheight — Map to the height of the product. The number must have "dot" as decimals separator.

Pdepth — Map to the depth of the product. The number must have "dot" as decimals separator.

Pmanufacturer	Map to the Manufacturer name of this product. Must be greater than 2 characters. This field is part of primary key of product.
Pmanfpartnumber	Map to the manufacturer's part number of this product. Must be greater than 2 characters. This field is part of primary key of product.
Pname	Map to the short description of the product.
Pdescription	Map to the long description of the product.
Pcategoryname	Map to the full hierarchical tree of category path. The last category in the hierarchy of category path is referred to as leaf. The product must belong to a leaf. Rule adopted by Statim today: *concatenate= "Cataloghi" +Pdelimiter +Pmanufacturer;* where *Pmanufacturer* is the leaf of category tree.
Paction	Map to 0,1 or 2 where this fields refers to action to be performed. 0= add or update (dynamically decided whether to do an add or update), 1= add or update (dynamically decided whether to do an add or update), 2= delete. Delete action should not be done in combination with add or update if the primary key is the same. The order of import is not the same order as the records in input data file. It could be better to manage another file to make only the action of delete. For delete, the primary keys should already exist.
Punitofweight	Map to the name of the unit of measure of the product weight.
Punitofdepth	Map to the name of the unit of measure of the product depth.
Punitofheight	Map to the name of the unit of measure of the product height.
Punitofwidth	Map to the name of the unit of measure of the product width.
Pdelimiter	Map to the delimiter used in *Pcategoryname* field to separate one category from another in the hierarchy.
Ptname	Map to the product type name to which this product belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Providerdomain	Map to the domain of the provider to which this product belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Providerid	Map to the ID of the provider to which this product belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Picture	Map to the full directory path and the name of file that contains the product image. The directory path must start where ectranslator starts. The name of file must contain the extension of file format.

Rules: ".\directory name\directory name".
Unix uses "/" instead of "\".

Picturename — Map to the name of image file; the name must contain the extension of file format.

Ariba Prices Record Format

Record Format Fields (the order shown is mandatory)

Order	Field Name	Type / Length	Null	Default	Field Description
1	Attributetype	Number / 2	Not null		Attribute type name
2	Ptname	String / 250	Not null		Name of product type
3	Providerdomain	String / 250	Not null		Domain of the type provider
4	Providerid	String / 50	Not null		ID of the provider
5	Attributename	String / 250	Not null		Attribute name
6	Padescription	String / 1000	Null		Description of the attribute
7	Isenumerated	Number / 1	Not null	0	Attribute characteristic
8	Istolerant	Number / 1	Not null	0	Tolerance specified when searching on attribute
9	Paminimun	Number / 18,4	Null		Minimum value for the attribute
10	Pamaximun	Number / 18,4	Null		Maximum value for the attribute
11	Unitofmeasure	String / 50	Null		Unit of measure of attribute
12	Aevalue	String / 255	Null		Attribute characteristic
13	Spaction	String / 1	Not null		Import action to be performed

Record Format Requirements

Attributetype — Map to 1,2,3,4 or 5 where 1=string, 2=date, 3=long, 4=double and 5=Boolean. The attribute type refers to the type of attribute name. For example, the attribute name "color" will probably

	have "1" (string) as attribute type; the attribute name "number of door" will probably have "3" (long) as attribute type.
Ptname	Map to the product type name to which this attribute belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Providerdomain	Map to the domain of the provider to which this attribute belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Providerid	Map to the ID of the provider to which this attribute belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.
Attributename	Map to product attribute name. Cannot be a duplicate for this primary key -the ptype belonging to.
Padescription	Map to the description of product attribute.
Isenumerated	This field describes a characteristic of the attribute. It can be used to define the type of values related to the attribute. Suggested rule = "0" (values attribute without specific characteristics).
Istolerant	This field describes a characteristic of the attribute. It can be used when the attribute type is long or double and it can have a tolerance specified when searching on this attribute. Suggested rule= "0" (values attribute without specific characteristics).
Paminimum	This field can be used when the attribute type is long or double. Map to the minimum value of this product attribute. This field can be used in the validation of attribute values entered for a product with this product attribute. Suggested rule = null. The number must have "dot" as decimals separator.
Pamaximum	This field can be used when the attribute type is long or double. Map to the maximum value of this product attribute. This field can be used in the validation of attribute values entered for a product with this product attribute. Suggested rule = null. The number must have "dot" as decimals separator.
Unitofmeasure	Map to the description of unit of measure of this product attributes, if it has one.
Aevalue	Map to the list of valid values of this product attribute, one at a time. This field refers to the use of *Isenumerated* field; *Isenumerated* = "0" -> Aevalue = must null.
Spaction	Map to 0, 1 or 2; where 0=add, 1=update, 2=delete. Product attributes is uniquely identified by *Ptname*, *Providerid, Providerdomain, Attributename*. Update action allows changes on *Padescription* and *Unitofmeasure* fields. Delete action involves the delete of all attributes values associated. The action should be the same for all records that have same

primary key in the table. For example, to perform an add and update, two import had to be performed with one of them with action add and the other one with action update, if primary key is the same. The reason is that the order of import is not the same order as the records in input data file.

Ariba Attribute Values Record Format

Record Format (fields in this order)

order	Field name	Type / length	Null	Default	Field description
1	Newvalue	String / 500	Not null		New value to update to
2	Oldvalue	String / 500	Null		Value to change
3	Savaction	String / 1	Not null		Import action to be performed
4	Ptname	String / 250	Not null		Name of product type
5	Providerdomain	String / 250	Not null		Domain of the type provider
6	Providerid	String / 50	Not null		ID of the provider
7	Pmanufacturer	String / 100	Not null		Manufacturer name
8	Pmanfpartnumber	String / 100	Not null		Manufacturer part number
9	Attributename	String / 250	Not null		Name of the attribute

Record Format Requirements

Newvalue — Map to the attribute value

Oldvalue — This field is used only in case of update (savaction=1). Map to the attribute value that currently exists in the Ariba Marketplace and enter the new value in field “newvalue”.

Savaction — Map to 0, 1 or 2.; where 0=add, 1=update, 2=delete. For update and delete, the primary key should already exist. The action should be the same for all records that have same primary key in the table. For example, to perform an add and update, two import had to be performed with one of them with action add and the other one with action update, if primary key is

the same. The reason is that the order of import is not the same order as the records in input data file.

Ptname — Map to the product type name to which this attribute value belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.

Providerdomain — Map to the domain of the provider to which this attribute value belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.

Providerid — Map to the ID of the provider to which this attribute value belongs. If not null, the fields *Ptname, Providerdomain, Providerid* must have a not null value and the values must already exist in *ECProducts.Product_type* table.

Pmanufacturer — Map to the Manufacturer name of this product. Must be greater than 2 characters. This field is part of primary key of product.

Pmanfpartnumber — Map to the manufacturer's part number of this product. Must be greater than 2 characters. This field is part of the primary key for the Product.

Attributename — Map to product attribute name.

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