

# IBX Content Workbench 3.0 User Manual Buyer



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Language: English



## Document Control

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### Change Log

Chapter	Date	Description
All	25.09.2010	Change Template and Layout
2.5.6	25.09.2010	Added Message Board topic
All	12.02.2011	Template update
2.10.1	04.05.2011	Note added
1.6	19.09.2011	Buyers View functionality added
2.0	13.02.2012	RFC 790 incorporated
2.7, 2.10	28.04.2012	Manual updated to add Automatic Catalogue Update option.
2.7	11.05.2012	Updated manual: added details for Mapping Configuration (Flexible Input Import)

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## 1. Content Workbench

The Content Workbench application displays all catalogs enabling to approve, activate and enrich catalogs. This application logs each action and saves all active catalog documents.

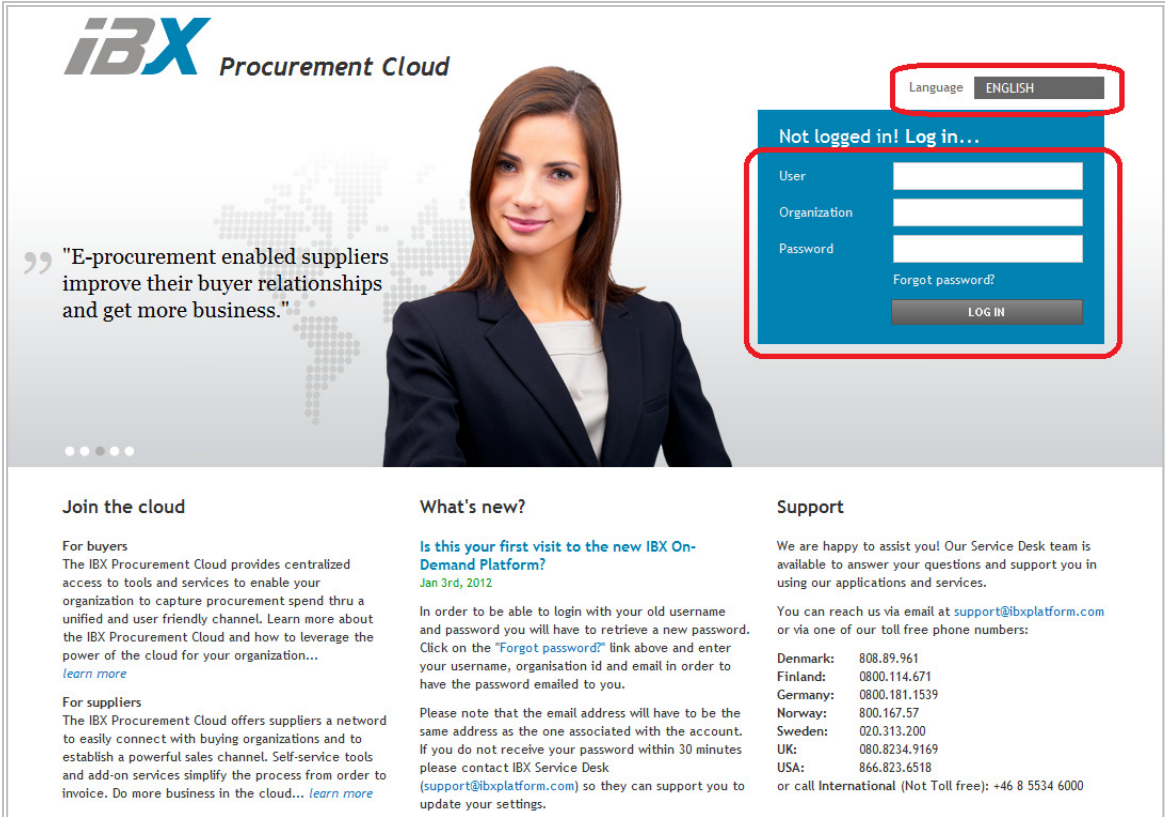
**NOTE:** Save a copy of all catalog documents in the computer as a backup.

### 1.1 Login

Follow these steps to login to the content workbench site:

- Go to [www.ibxnordic.net](http://www.ibxnordic.net)
- Choose preferred language from drop-down menu.
- Enter the **User**, **Organization**, and **Password** and click **Log In** button. All fields are required.

User IDs and passwords are personal and the organization ID is same throughout the company. Contact organization administrator for any further assistance.



**ibx Procurement Cloud**

“E-procurement enabled suppliers improve their buyer relationships and get more business.”

Language: ENGLISH

Not logged in! Log in...

User:

Organization:

Password:

Forgot password?

LOG IN

**Join the cloud**

**For buyers**  
The IBX Procurement Cloud provides centralized access to tools and services to enable your organization to capture procurement spend thru a unified and user friendly channel. Learn more about the IBX Procurement Cloud and how to leverage the power of the cloud for your organization... [learn more](#)

**For suppliers**  
The IBX Procurement Cloud offers suppliers a network to easily connect with buying organizations and to establish a powerful sales channel. Self-service tools and add-on services simplify the process from order to invoice. Do more business in the cloud... [learn more](#)

**What's new?**

**Is this your first visit to the new IBX On-Demand Platform?**  
Jan 3rd, 2012

In order to be able to login with your old username and password you will have to retrieve a new password. Click on the "Forgot password?" link above and enter your username, organisation id and email in order to have the password emailed to you.

Please note that the email address will have to be the same address as the one associated with the account. If you do not receive your password within 30 minutes please contact IBX Service Desk ([support@ibxplatform.com](mailto:support@ibxplatform.com)) so they can support you to update your settings.

**Support**

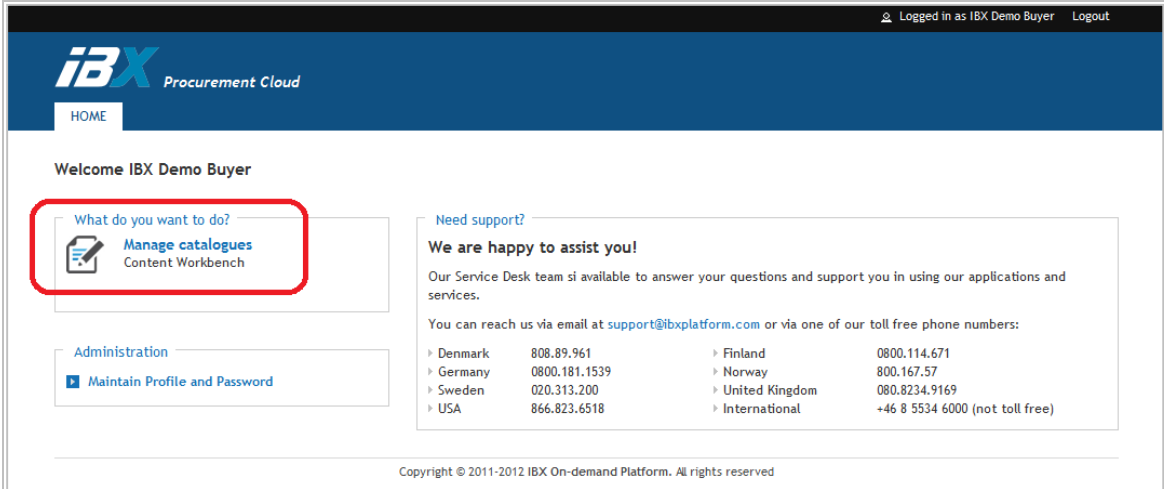
We are happy to assist you! Our Service Desk team is available to answer your questions and support you in using our applications and services.

You can reach us via email at [support@ibxplatform.com](mailto:support@ibxplatform.com) or via one of our toll free phone numbers:

Denmark: 808.89.961  
Finland: 0800.114.671  
Germany: 0800.181.1539  
Norway: 800.167.57  
Sweden: 020.313.200  
UK: 080.8234.9169  
USA: 866.823.6518  
or call International (Not Toll free): +46 8 5534 6000

**Figure 1: Login**

- After a successful login, **Home** page is displayed on the screen. The hyperlink under **Administration** redirects you to the module that allows you performing administrative and profile configuration tasks.
- Click **Manage Catalogues** link under **What do you want to do?** section to open Content Workbench to manage catalogs.



Logged in as IBX Demo Buyer Logout

**ibx** Procurement Cloud

HOME

Welcome IBX Demo Buyer

What do you want to do?

- Manage catalogues  
Content Workbench

Administration

- Maintain Profile and Password

Need support?

We are happy to assist you!

Our Service Desk team is available to answer your questions and support you in using our applications and services.

You can reach us via email at [support@ibxplatform.com](mailto:support@ibxplatform.com) or via one of our toll free phone numbers:

Denmark	808.89.961	Finland	0800.114.671
Germany	0800.181.1539	Norway	800.167.57
Sweden	020.313.200	United Kingdom	080.8234.9169
USA	866.823.6518	International	+46 8 5534 6000 (not toll free)

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Figure 2: Home

## 1.2 Catalog Update Workflow

The workflow for a catalog update is as follows:

1. Supplier uploads supplemental files
2. Supplier uploads the catalog file
3. Publish catalog
4. Approve or reject catalog
5. Enrich the catalog
6. Activate catalog
7. Catalog is transferred to the Search Engine

A buyer performs steps 4 to 6, and can modify the enrichment after the catalog is available in the Search Engine.

**NOTE:** *Content Workbench automatically disables the upload enrichment function, when a catalog is waiting for an action from the supplier (Steps 1 to 3).*

## 1.3 Catalog Statuses

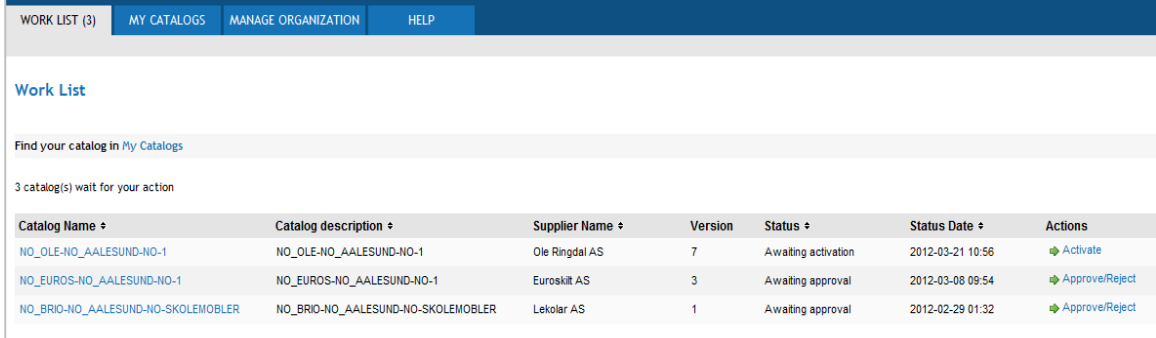
A new status is displayed for the catalog on each new step in the workflow. This status is displayed in **Status** field.

### Order status:

Status	Meaning
<b>New</b>	New catalogs
<b>In progress</b>	The supplier has started the catalog uploads.
<b>Error</b>	Errors in the catalog update file.
<b>Awaiting publishing</b>	Catalog upload is successful without errors.
<b>Awaiting approval</b>	The supplier has published the catalog.
<b>Awaiting enrichment</b>	After the catalog approval, add any internal information to enrich the catalog.
<b>Awaiting activation</b>	Catalog is approved and enriched.
<b>Transfer to SE in progress</b>	Catalog is activated.
<b>Activated</b>	Catalog is successfully transferred to the Search Engine (or external path folder).
<b>Rejected</b>	Catalog is rejected.
<b>Aborted</b>	Catalog is aborted by the supplier.
<b>Awaiting Transfer</b>	<p>This status is displayed if a future date is selected for activation.</p> <p>This activation date can be rescheduled by selecting a different date either prior or later to the selected activation date.</p>
<b>System processing</b>	The workflow step for the catalog is pending from the system.

## 1.4 User Interface Management

Click the tabs to navigate between different pages of Content Workbench.



Catalog Name	Catalog description	Supplier Name	Version	Status	Status Date	Actions
NO_OLE-NO_AALESUND-NO-1	NO_OLE-NO_AALESUND-NO-1	Ole Ringdal AS	7	Awaiting activation	2012-03-21 10:56	Activate
NO_EUROS-NO_AALESUND-NO-1	NO_EUROS-NO_AALESUND-NO-1	Euroskit AS	3	Awaiting approval	2012-03-08 09:54	Approve/Reject
NO_BRIO-NO_AALESUND-NO-SKOLEMOBLER	NO_BRIO-NO_AALESUND-NO-SKOLEMOBLER	Lekolar AS	1	Awaiting approval	2012-02-29 01:32	Approve/Reject

Figure 3: User Interface

### 1.4.1 User Interface Language

Set a preferred language in Content Workbench by choosing the language under **Change Profile** page on the Marketsite.

Following steps list the procedure to set the language:

1. Click **Logout** link to logout from the present session.
2. Enter the login credentials in the login page to re-login.
3. Click the **Maintain Profile and Password** link in the **Administration** section.
4. System displays **Identity Manager** home page.

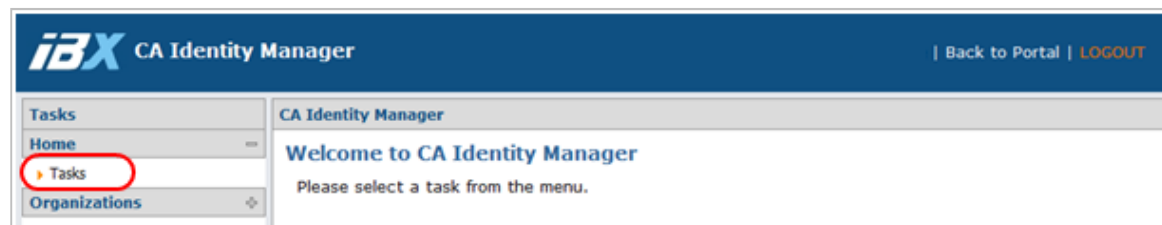

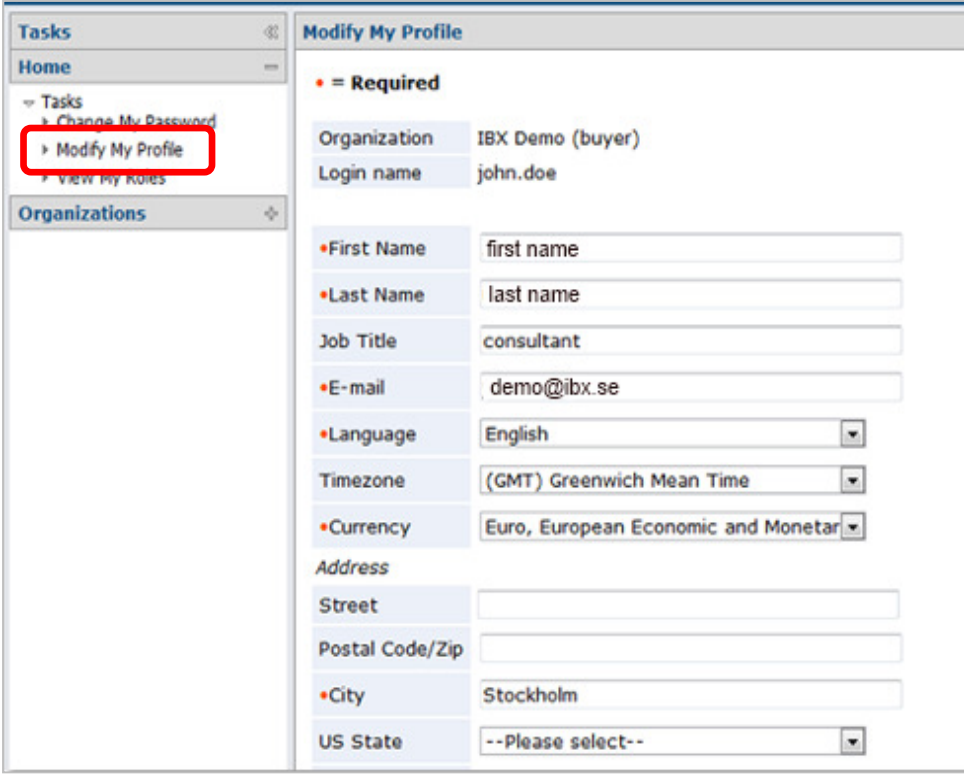


Figure 4: Identity Manager

5. Click  icon right before **Tasks**, to expand the task list.
6. Click on **Modify My Profile**.
7. Change the language in **Modify My Profile** section, and click the **Submit** button.



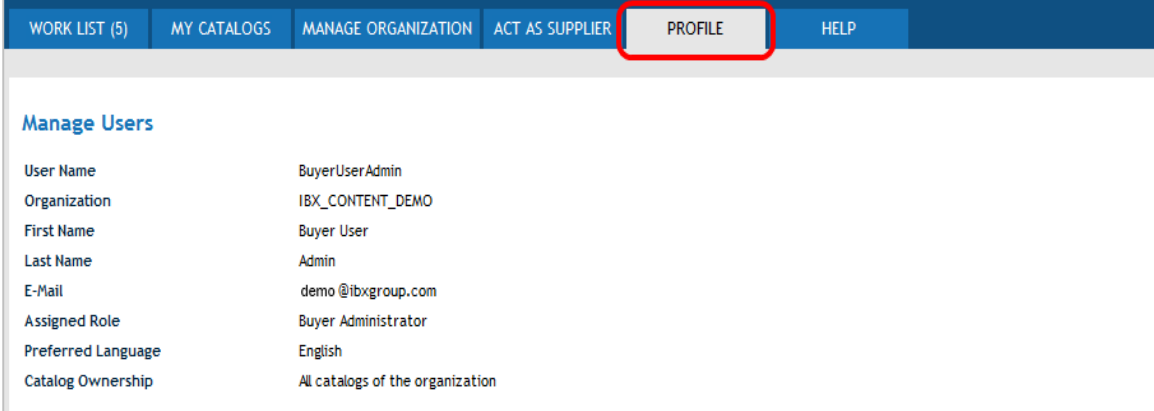


Modify My Profile	
• = Required	
Organization	IBX Demo (buyer)
Login name	john.doe
•First Name	first name
•Last Name	last name
Job Title	consultant
•E-mail	demo@ibx.se
•Language	English
Timezone	(GMT) Greenwich Mean Time
•Currency	Euro, European Economic and Monetary
<i>Address</i>	
Street	
Postal Code/Zip	
•City	Stockholm
US State	--Please select--

Figure 5: Change Profile

## 1.5 Profile

This tab displays user details such as email address, role, and the catalogs that are owned.



WORK LIST (5)	MY CATALOGS	MANAGE ORGANIZATION	ACT AS SUPPLIER	<b>PROFILE</b>	HELP
---------------	-------------	---------------------	-----------------	----------------	------

**Manage Users**

User Name	BuyerUserAdmin
Organization	IBX_CONTENT_DEMO
First Name	Buyer User
Last Name	Admin
E-Mail	demo@ibxgroup.com
Assigned Role	Buyer Administrator
Preferred Language	English
Catalog Ownership	All catalogs of the organization

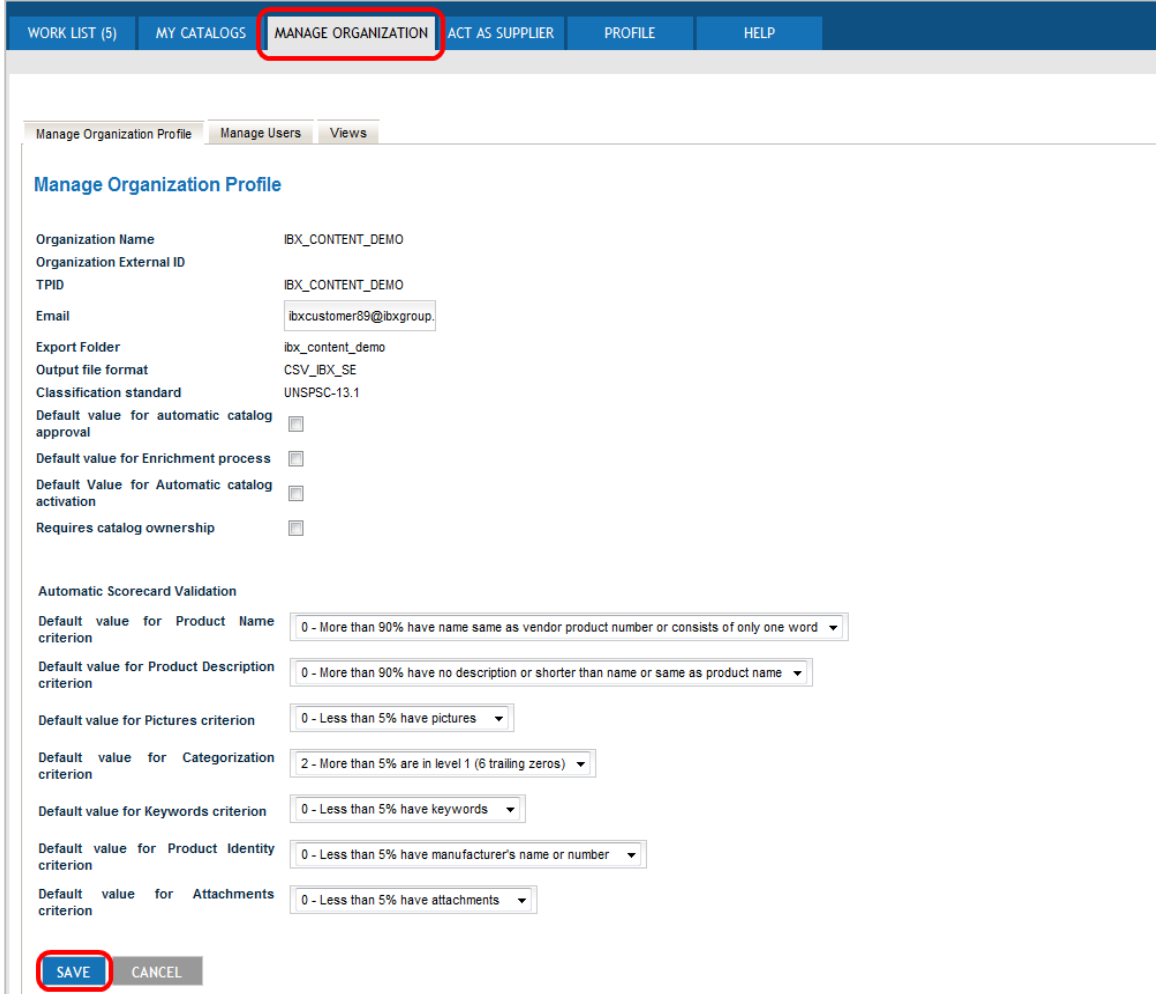
**Figure 6: Profile**

## 1.6 Manage Organization

**NOTE:** This tab is only enabled for administrators.

The default settings are configured for the company in this tab such as:

- Email address
- Default settings for automatic approval
- Enrichment
- Automatic activation
- To set condition that all catalogs must have a catalog owner
- The default criteria for automatic scorecard (optional)



The screenshot shows the 'Manage Organization Profile' configuration page. The 'MANAGE ORGANIZATION' tab is highlighted with a red box. The page contains the following settings:

Organization Name	IBX_CONTENT_DEMO
Organization External ID	
TPID	IBX_CONTENT_DEMO
Email	ibxcustomer89@ibxgroup.
Export Folder	ibx_content_demo
Output file format	CSV_IBX_SE
Classification standard	UNSPSC-13.1
Default value for automatic catalog approval	<input type="checkbox"/>
Default value for Enrichment process	<input type="checkbox"/>
Default Value for Automatic catalog activation	<input type="checkbox"/>
Requires catalog ownership	<input type="checkbox"/>

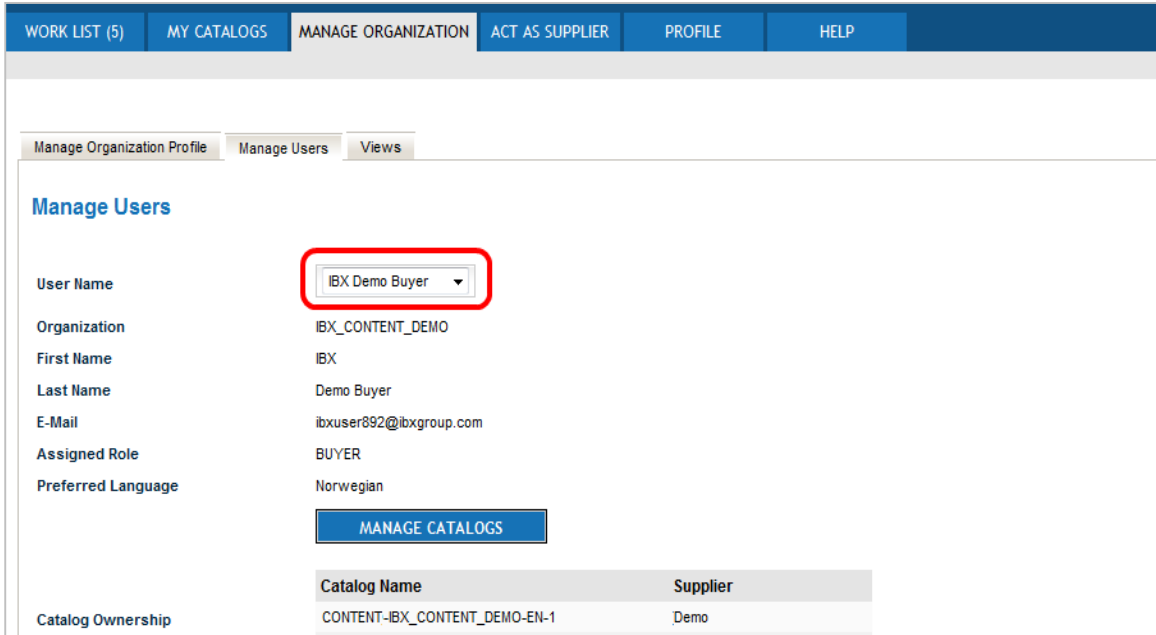
**Automatic Scorecard Validation**

Default value for Product Name criterion	0 - More than 90% have name same as vendor product number or consists of only one word
Default value for Product Description criterion	0 - More than 90% have no description or shorter than name or same as product name
Default value for Pictures criterion	0 - Less than 5% have pictures
Default value for Categorization criterion	2 - More than 5% are in level 1 (6 trailing zeros)
Default value for Keywords criterion	0 - Less than 5% have keywords
Default value for Product Identity criterion	0 - Less than 5% have manufacturer's name or number
Default value for Attachments criterion	0 - Less than 5% have attachments

At the bottom, there are 'SAVE' and 'CANCEL' buttons, with 'SAVE' highlighted by a red box.

**Figure 7: Manage Organization Profile**

Under **Manage Users** tab, select a user from the drop-down list to check the email address, role, and catalog ownership for the user.



**Manage Users**

User Name: IBX Demo Buyer

Organization: IBX\_CONTENT\_DEMO

First Name: IBX

Last Name: Demo Buyer

E-Mail: ibxuser892@ibxgroup.com

Assigned Role: BUYER

Preferred Language: Norwegian

**MANAGE CATALOGS**

Catalog Name	Supplier
CONTENT-IBX_CONTENT_DEMO-EN-1	Demo

**Figure 8: Manage Users**

Under **Views** tab, you can see the the list of buyer views that were defined in **IBX Search Engine**.

To see the list, click  icon followed by **Buyer Views** and select the view from the list.

For each buyer view the system shows:

1. **View Name:** Name of the view
2. **View Type:** Type of the view
3. **Language:** Language used for searching in **IBX Search Engine** when the view is used
4. **Assigned Catalogs:** List of catalogs-IDs assigned for the view.

Under this tab, you can also download the list of catalogs assigned to the view in order to check them offline following below steps:

1. Select **Only assigned catalogs** or **All catalogs** radio buttons as required **Export settings**.
2. Click **Export** button.

**NOTE:** *If **All catalogs** was selected, the list includes a marking of which catalogs are assigned to the views (marked with 1, the rest are marked with 0).*

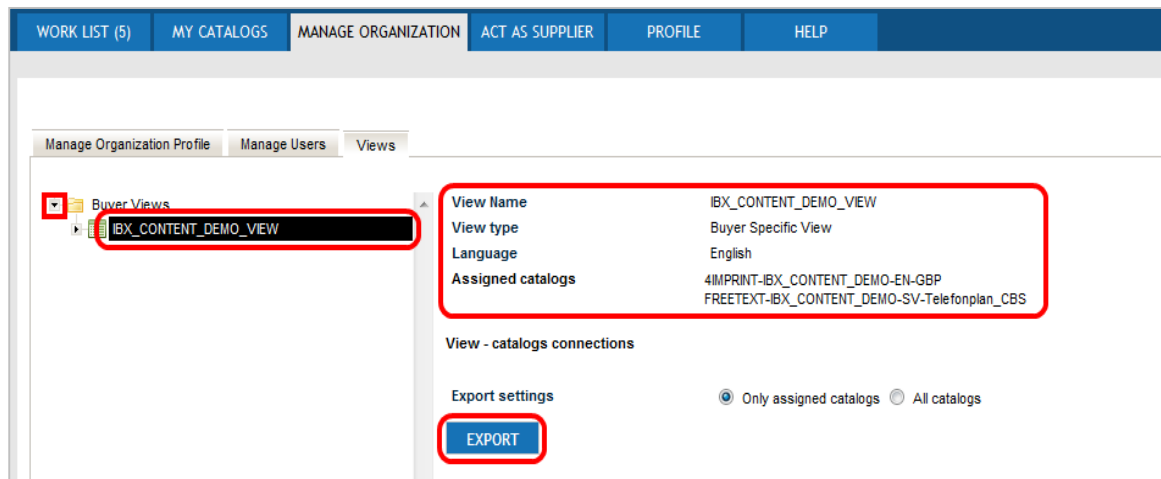
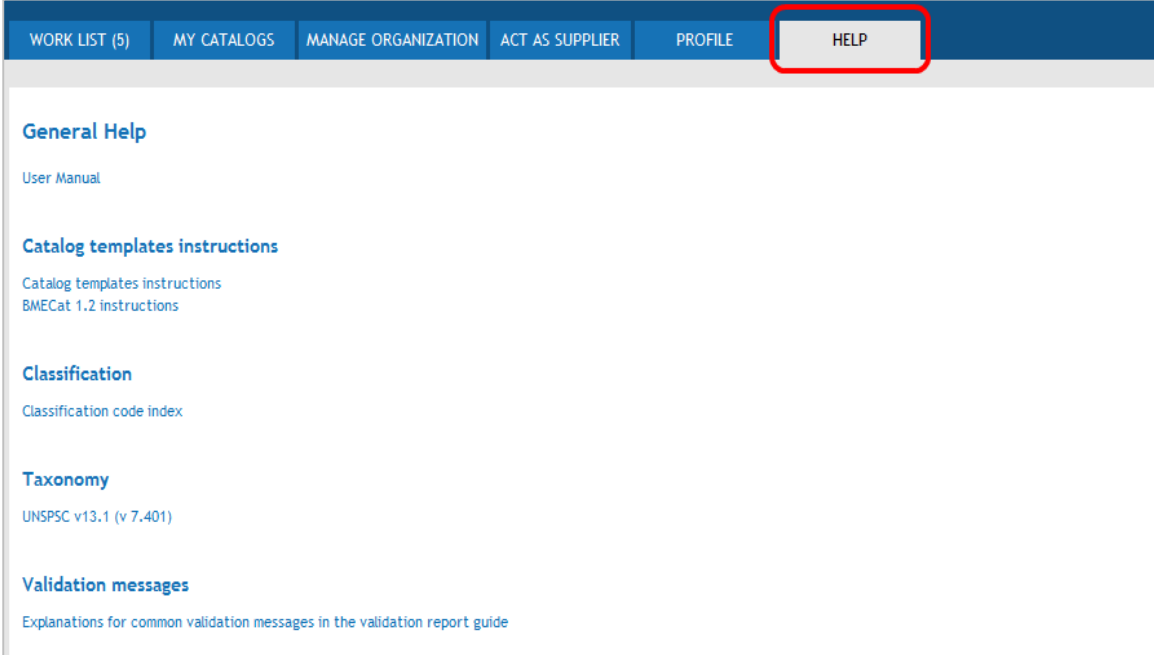


Figure 9: Views

## 1.7 Help

This tab lists the following useful resources to work with the **IBX Content Workbench**:

- User Manual
- Catalog templates instructions
- Classification code index
- Taxonomy
- Validation Messages



WORK LIST (5) MY CATALOGS MANAGE ORGANIZATION ACT AS SUPPLIER PROFILE **HELP**

### General Help

[User Manual](#)

### Catalog templates instructions

[Catalog templates instructions](#)  
[BMECat 1.2 instructions](#)

### Classification

[Classification code index](#)

### Taxonomy

[UNSPSC v13.1 \(v 7.401\)](#)

### Validation messages

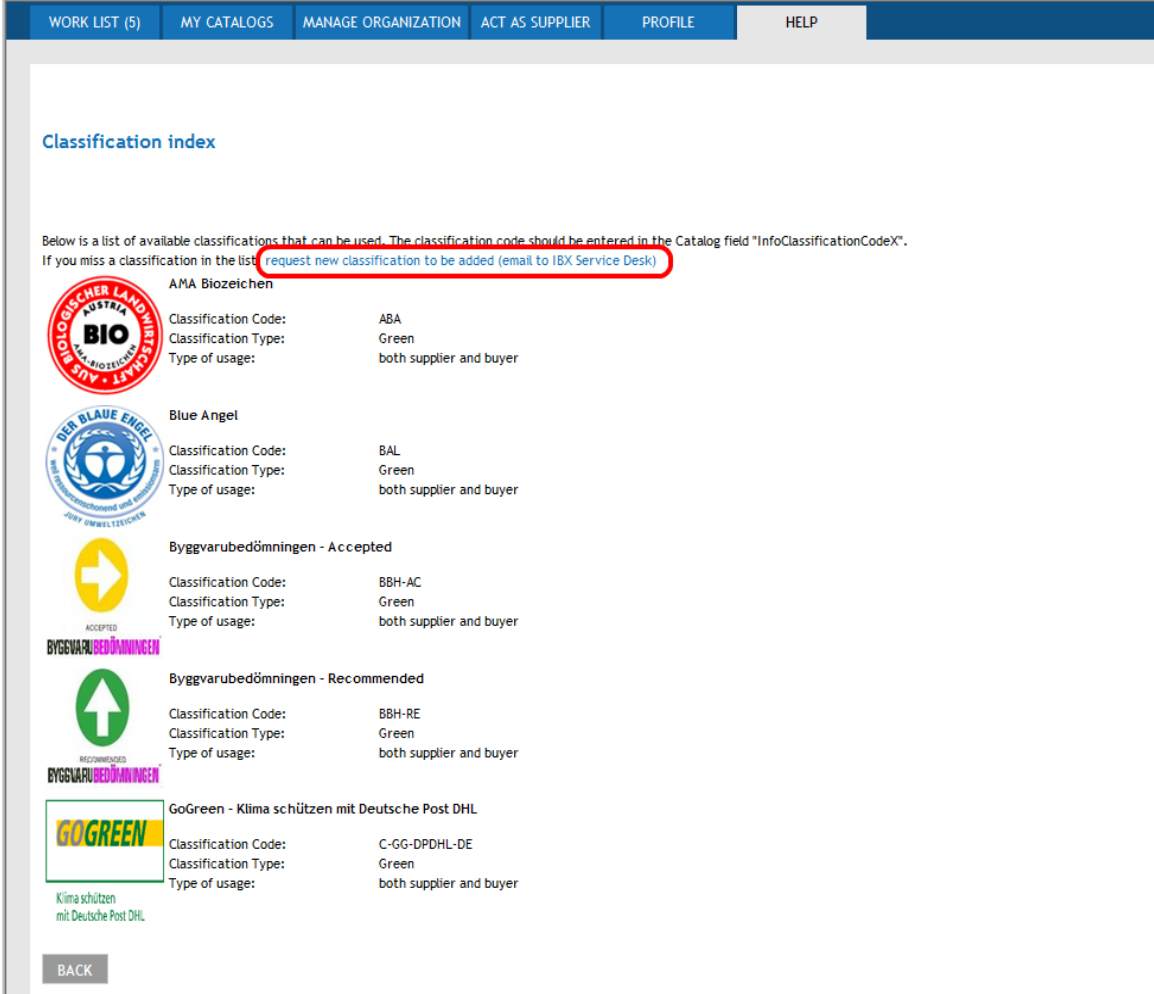
[Explanations for common validation messages in the validation report guide](#)

**Figure 10: Help**

## 1.7.1 Classification index

**Classification index** lists all the available classifications that can be used in a catalog. To see the index, click on **Classification code index** in **Classification** section under **Help** tab. You can classify the items by adding the **Classification Code** from the Classification index list to the items.






Click **request new classification to be added (email to IBX Service Desk)** link for requesting a new classification code via Service Request.



WORK LIST (5) MY CATALOGS MANAGE ORGANIZATION ACT AS SUPPLIER PROFILE HELP

### Classification index

Below is a list of available classifications that can be used. The classification code should be entered in the Catalog field "InfoClassificationCodeX".  
 If you miss a classification in the list: [request new classification to be added \(email to IBX Service Desk\)](#)

	<b>AMA Biozeichen</b> Classification Code: ABA Classification Type: Green Type of usage: both supplier and buyer
	<b>Blue Angel</b> Classification Code: BAL Classification Type: Green Type of usage: both supplier and buyer
	<b>Byggarubedömnigen - Accepted</b> Classification Code: BBH-AC Classification Type: Green Type of usage: both supplier and buyer
	<b>Byggarubedömnigen - Recommended</b> Classification Code: BBH-RE Classification Type: Green Type of usage: both supplier and buyer
	<b>GoGreen - Klima schützen mit Deutsche Post DHL</b> Classification Code: C-GG-DPDHL-DE Classification Type: Green Type of usage: both supplier and buyer

BACK

Figure 11: Classification index

## 2. Catalog Administration

Catalogs are displayed in following two tabs:

- **Work List:** Catalogs that are waiting for action are displayed.
- **My Catalogs:** Catalogs regardless of its status are displayed.

WORK LIST (5)	MY CATALOGS	MANAGE ORGANIZATION	ACT AS SUPPLIER	PROFILE	HELP	
<b>My Catalogs</b>						
There are 5 catalog(s) waiting for your action in Work List						
Search for		<input type="text"/>	<input type="button" value="SEARCH"/>			
Catalog Name	Catalog description	Supplier Name	Latest Activation	Version	Status	Actions
4MPRINT-IBX_CONTENT_DEMO-EN-EUR	4MPRINT-IBX_CONTENT_DEMO-EN-EUR	4mprint	2011-05-12 10:09	2	Activated	<a href="#">Enrich</a>
4MPRINT-IBX_CONTENT_DEMO-EN-GBP	4MPRINT-IBX_CONTENT_DEMO-EN-GBP	4mprint	2011-03-04 05:50	2	Activated	<a href="#">Enrich</a>
CONSTRUCTION_DEMO-IBX_CONTENT_DEMO-DE-1	CONSTRUCTION_DEMO-IBX_CONTENT_DEMO-DE-1	Construction Ltd (demo)	2011-09-23 02:38	4	Rejected	<a href="#">Difference Report</a>

**Figure 12: My Catalogs**





## 2.1 Search for Catalogs

Following are the steps to check for catalogs that meet a certain criteria.

1. Click **My Catalogs** tab.
2. Enter criteria in the **Search for** textbox.
3. Click **Search** button to view the results.

### 2.1.1 Sort the Result Table

The search result table is sorted by clicking a column header field. An arrow in the header shows if the field is sorted in ascending  or descending  order.









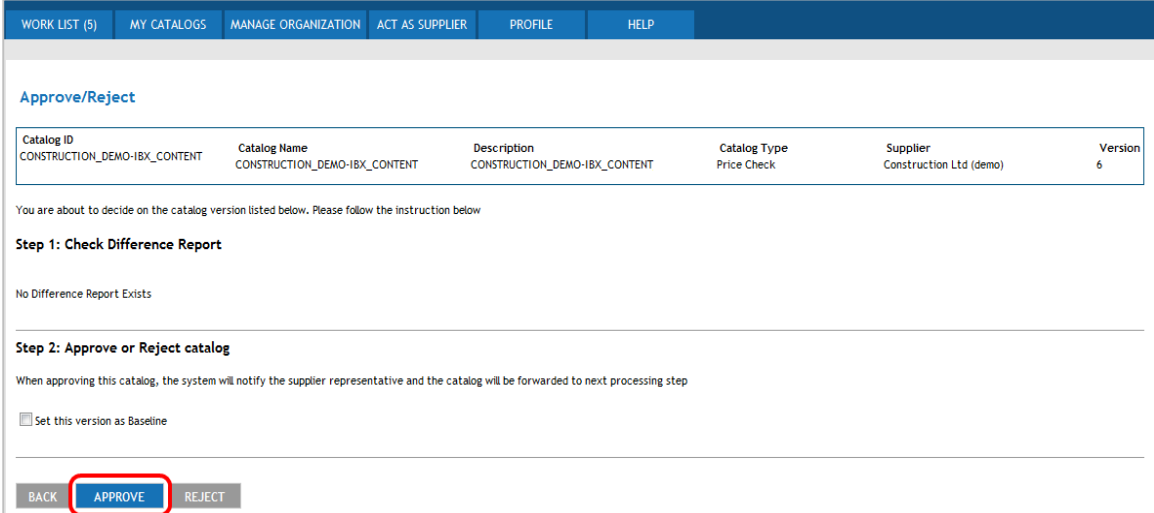
Catalog Name 	Catalog description 	Supplier Name 	Latest Activation 	Version	Status 	Actions
4MPRINT-IBX_CONTENT_DEMO-EN-EUR	4MPRINT-IBX_CONTENT_DEMO-EN-EUR	4mprint	2011-05-12 10:09	2	Activated	 Enrich
4MPRINT-IBX_CONTENT_DEMO-EN-GBP	4MPRINT-IBX_CONTENT_DEMO-EN-GBP	4mprint	2011-03-04 05:50	2	Activated	 Enrich
CONSTRUCTION_DEMO-IBX_CONTENT_DEMO-DE-1	CONSTRUCTION_DEMO-IBX_CONTENT_DEMO-DE-1	Construction Ltd (demo)	2011-09-23 02:38	4	Rejected	 Difference Report

Figure 13: My Catalogs - Sort result

## 2.2 Approve Catalog

A published catalog is displayed under **Work List** tab. Following is the process to approve a catalog.

1. Click **Work List** tab (*displays catalog name, version, status and date*)
2. Click **Approve/Reject** in **Actions** field for the catalog
3. Click **Download Difference Report** to check for the updated data
4. Confirm by clicking **Approve** button.



**Approve/Reject**

Catalog ID	Catalog Name	Description	Catalog Type	Supplier	Version
CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	Price Check	Construction Ltd (demo)	6

You are about to decide on the catalog version listed below. Please follow the instruction below

**Step 1: Check Difference Report**

No Difference Report Exists

**Step 2: Approve or Reject catalog**

When approving this catalog, the system will notify the supplier representative and the catalog will be forwarded to next processing step

Set this version as Baseline

**BACK** **APPROVE** **REJECT**

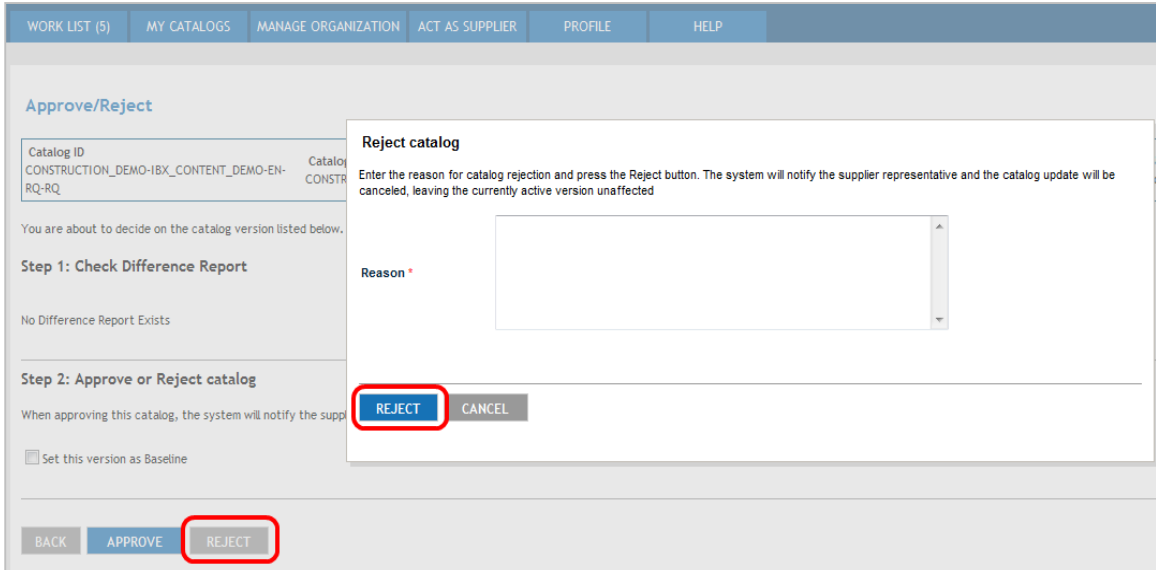
**Figure 14: Approve Catalog**

Any newly added field in an item is displayed in Green color; any altered field is displayed in yellow color and any deleted field in Red color.

## 2.3 Reject Catalog

A catalog can be rejected with the following process:

1. Open **Work List** tab.
2. Click **Approve/Reject** link in **Actions** field for the catalog.
3. Click **Download Difference Report** to check for any updated content.
4. Click **Reject** button.
5. Mention **Reason** for rejection.
6. Confirm by clicking **Reject** button.



The screenshot displays the 'Approve/Reject' interface. At the top, there are navigation tabs: WORK LIST (5), MY CATALOGS, MANAGE ORGANIZATION, ACT AS SUPPLIER, PROFILE, and HELP. The main content area is titled 'Approve/Reject' and shows a catalog ID: CONSTRUCTION\_DEMO-IBX\_CONTENT\_DEMO-EN-RQ-RQ. Below this, there are instructions and a 'Reason' text area. At the bottom of the dialog, there are 'REJECT' and 'CANCEL' buttons. The 'REJECT' button is highlighted with a red box. In the background, the 'REJECT' button on the main page is also highlighted with a red box.

Figure 15: Reject Catalog

## 2.4 Enrich Catalog

NOTE: *This step is only enabled if enrichment is activated for a Catalog.*

Enrich catalog allows to add or remove information on catalog before activating it.

The default enrichment template contains a field for removing products from the catalog. A customized enrichment template with additional fields can be prepared by requesting IBX.

NOTE: *Avoid sharing a field with suppliers, since Content Workbench ignores the supplier updates on these fields.*

1. Click **Work List** tab.
2. Click **Enrich** in **Actions** field for a catalog.
3. Click **Download Enrichment Template** link and save file on your computer.
4. Open the enrichment file and add the enrichment data (e.g. enter an R in the field **(R)ject/(B)lock** to remove the product from the catalog) and save the file.
5. Click **Browse** button and select the updated enrichment file.
6. Click **Upload** button to upload the enrichment file.
7. The page gets automatically refreshed and the following message is displayed while the upload is processed.

*“Uploading new enrichment is not available while the system processes the uploaded file”*

After a few minutes the page will be active.

8. Click **Work List** tab and click **Enrich** in the Actions field to complete the enrichment upload.
9. Click **Finish** button to complete the enrichment step.

NOTE: *Click **Finish** button directly to skip the enrichment step.*

WORK LIST (5)	MY CATALOGS	MANAGE ORGANIZATION	ACT AS SUPPLIER	PROFILE	HELP
---------------	-------------	---------------------	-----------------	---------	------

**Enrich**

Catalog ID	Catalog Name	Description	Catalog Type	Supplier	Version
CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	Price Check	Construction Ltd (demo)	6

Download enrichment template; enter enrichment date you need then upload the file. You can iterate as many times you need.

**Step1: Download Enrichment**

[Download Enrichment Template](#)

**Step2: Upload Enrichment**

Select enrichment file and press Upload button. When last enrichment session was finished press Finish button.

File\*

**Step3: Finish Enrichment**

When you are satisfied with the enrichment press Finish to continue the process. If you have not uploaded new enrichment the data from previous catalog version will be used

Figure 16: Enrich Catalog

## 2.4.1 Activate Catalog

Catalog is activated to transfer it to Search Engine. A future date can be selected to reschedule the activation date.

1. Open **Work List** tab.
2. Click **Activate** link in the **Actions** field for your catalog.
3. Select **Activation Date**.
4. Confirm by clicking **Activate** button.

If the present day's date is selected, the Catalog gets transferred right away. The Catalog gets transferred at 00:01 (time) if any other day is selected.

WORK LIST (5)	MY CATALOGS	MANAGE ORGANIZATION	ACT AS SUPPLIER	PROFILE	HELP
---------------	-------------	---------------------	-----------------	---------	------

**Activate**

Catalog ID	Catalog Name	Description	Catalog Type	Supplier	Version
CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	CONSTRUCTION_DEMO-IBX_CONTENT	Price Check	Construction Ltd (demo)	6

**Step1: Activate Catalog**

Activation date\*

Figure 17: Activate Catalog

The activation date can be rescheduled by selecting **Reschedule activation** in **My Catalogs**.

## 2.5 Catalog Details

Click the catalog name to view the catalog details.

### 2.5.1 History & Status

This tab displays all updated versions and a difference report is downloaded to view errors.

1. Open **Work list** or **My catalogs** tab
2. Click the catalog name link.
3. Click **Difference Report** link to view the difference report files
4. Click **Download** link to download the entire catalog in different formats.




Version	File Name	Upload	Validate	Publish/Abort	Approve/Reject	Enrich	Schedule activation	Activate	Actions
5	IBXProductPricepriserpr06.04.2011sendtmn.xlsx	2011-04-07 12:43 IBX Service Desk	 with warnings 2011-04-07 12:44 system	Published 2011-04-07 12:44 IBX Service Desk	approved 2011-04-08 01:10 Tore Dammerud		activation scheduled 2011-04-08 01:11 Tore Dammerud	Activated 2011-04-08 01:15 Tore Dammerud	<a href="#">Difference Report Download</a>
4	IBX ProductPrice priser pr 23.11.xlsx	2011-03-23 09:51 IBX Service Desk	 No Errors 2011-03-23 09:51 system	Published 2011-03-23 09:52 IBX Service Desk	approved 2011-03-23 10:04 Tore Dammerud		activation scheduled 2011-03-23 10:04 Tore Dammerud	Activated 2011-03-23 10:15 Tore Dammerud	<a href="#">Difference Report Download</a>
3	NO_OLE-NO_AALESUND-NO-1-101124.xlsx	2010-11-24 09:32 IBX Service Desk	 with warnings 2010-11-24 09:33 system	Published 2010-11-24 09:33 IBX Service Desk	approved 2010-11-26 08:46 Tore Dammerud		activation scheduled 2010-11-26 08:46 Tore Dammerud	Activated 2010-11-26 09:00 Tore Dammerud	<a href="#">Difference Report Download</a>

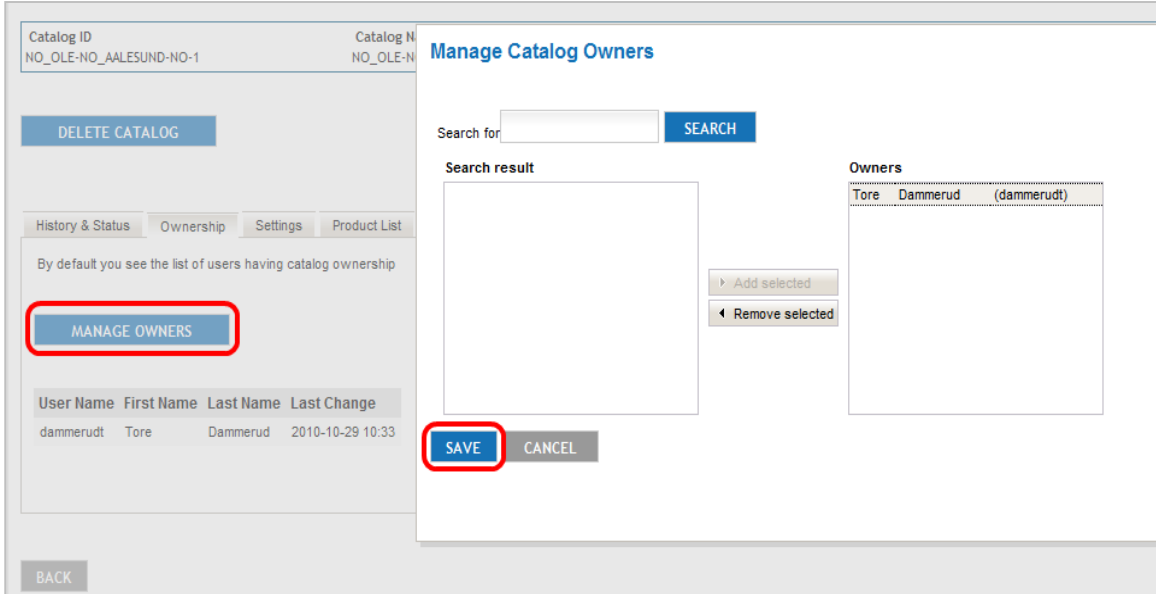
Figure 18: Catalog Details - History & Status

## 2.5.2 Ownership

The access privileges for Catalog owners are managed in this tab.

**NOTE:** *It is not possible to select an admin user as a catalog owner.*

1. Click **Work List** or **My Catalogs** tab.
2. Find the catalog and click the catalog name.
3. Click **Ownership** tab.
4. Click **Manage Owners** button.
5. Search for the users by entering the name in **Search for** textbox and by clicking **Search** button.
6. Add ownership by selecting users from the left side list and click **Add Selected** to move them to right side list.
7. Click **Save** button.



Catalog ID: NO\_OLE-NO\_AALESUND-NO-1

Catalog Name: NO\_OLE-N

**Manage Catalog Owners**

Search for:  **SEARCH**

Search result

Owners

User Name	First Name	Last Name	Last Change
dammerudt	Tore	Dammerud	2010-10-29 10:33

By default you see the list of users having catalog ownership

History & Status Ownership Settings Product List

DELETE CATALOG

MANAGE OWNERS

BACK

► Add selected

◄ Remove selected

**SAVE** CANCEL

Figure 19: Manage Catalog Owners

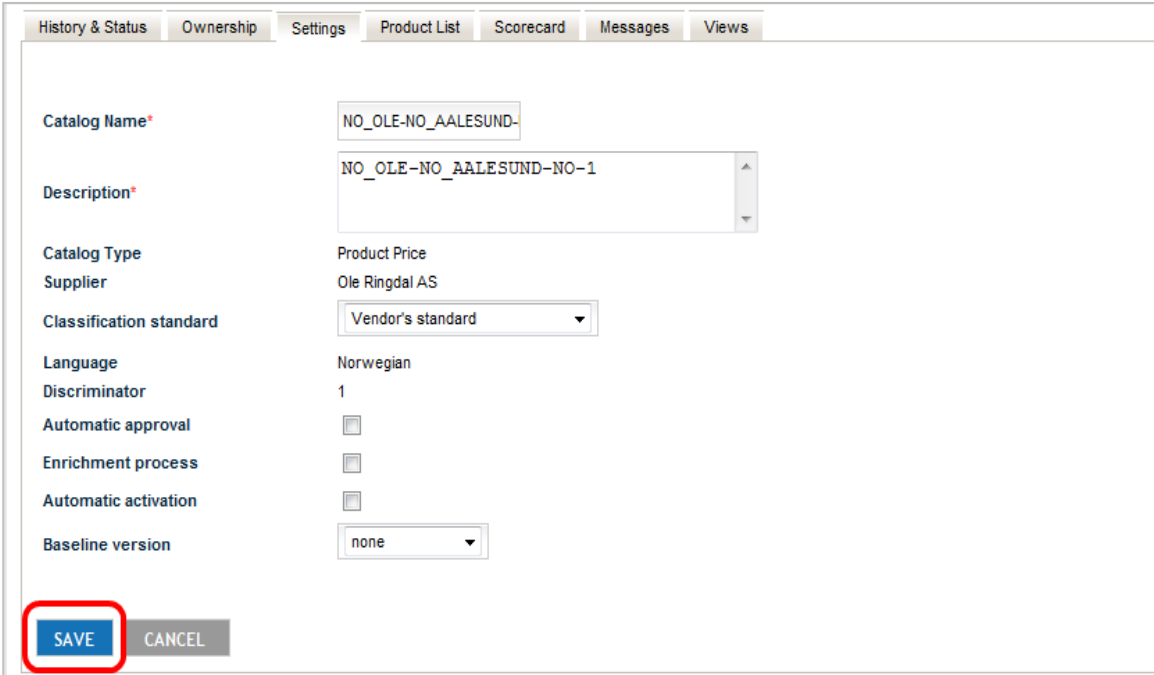
## 2.5.3 Settings

The **Settings** tab is used to enter catalog specific settings for each catalog. These settings overrule the organization settings. The following tasks are performed using **Settings** tab:

- Select a new catalog name or description.
- Change the classification standard.
- Select if the catalog should be automatically approved.
- Enable enrichment.
- Select if the catalog should be automatically activated.
- Select a baseline version (optional).

Baseline is an addition to the regular difference report that displays changes from the previous catalog version. The baseline function allows viewing and comparing the changes from older catalog versions. Select the baseline version and the next catalog update displays a difference report from the previous version and the changes from the baseline version.

1. Click **Work list** or **My Catalogs** tab.
2. Find catalog and click catalog name.
3. Click **Settings** tab.
4. Modify settings.
5. Click **Save** button.



The screenshot shows the 'Settings' tab of the 'Catalog Details' form. The form contains the following fields and values:

Field	Value
Catalog Name*	NO_OLE-NO_AALESUND-
Description*	NO_OLE-NO_AALESUND-NO-1
Catalog Type	Product Price
Supplier	Ole Ringdal AS
Classification standard	Vendor's standard
Language	Norwegian
Discriminator	1
Automatic approval	<input type="checkbox"/>
Enrichment process	<input type="checkbox"/>
Automatic activation	<input type="checkbox"/>
Baseline version	none

At the bottom left, there are two buttons: 'SAVE' (highlighted with a red box) and 'CANCEL'.

Figure 20: Catalog Details - Settings

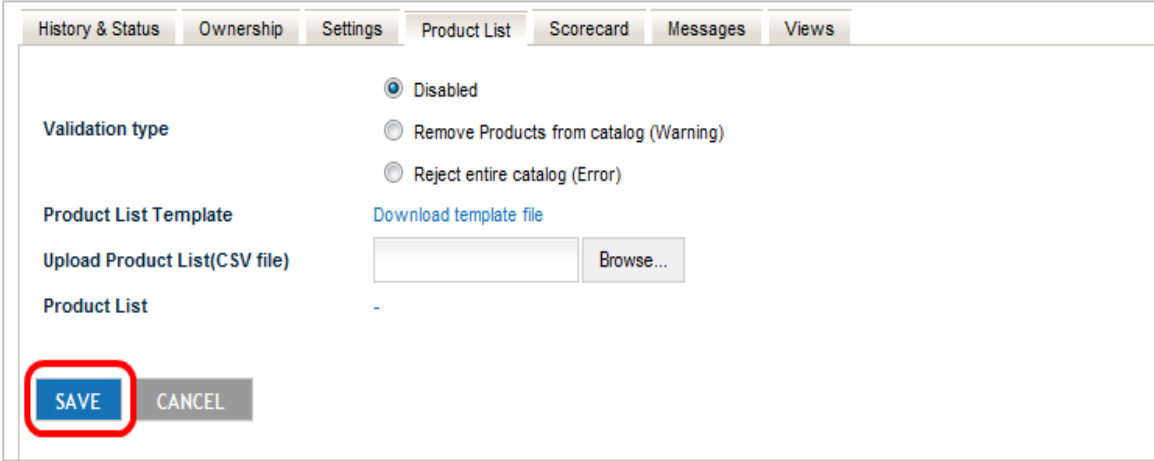


## 2.5.4 Product List

A product list is a list of valid article numbers that are used in the validation of each catalog update. If the catalog contains products that are not in the product list, Content Workbench either removes the product or rejects the update so that supplier removes the products.

Following are the steps to create a product list for each catalog and download the current list.

1. Click **Work list** or **My Catalogs** tab.
2. Find the catalog and click catalog name.
3. Click **Product List** tab.
4. Select **Validation type**.
5. Click **Download template file** and save it on the computer.
6. Open the file (using MS Excel) and enter the valid product numbers for catalog and save the file.
7. Click **Browse** button and select your file.
8. Click **Save** button.



History & Status Ownership Settings **Product List** Scorecard Messages Views

**Validation type**

Disabled

Remove Products from catalog (Warning)

Reject entire catalog (Error)

**Product List Template**

[Download template file](#)

**Upload Product List(CSV file)**

**Product List**

-

**Figure 21: Catalog Details - Product List**

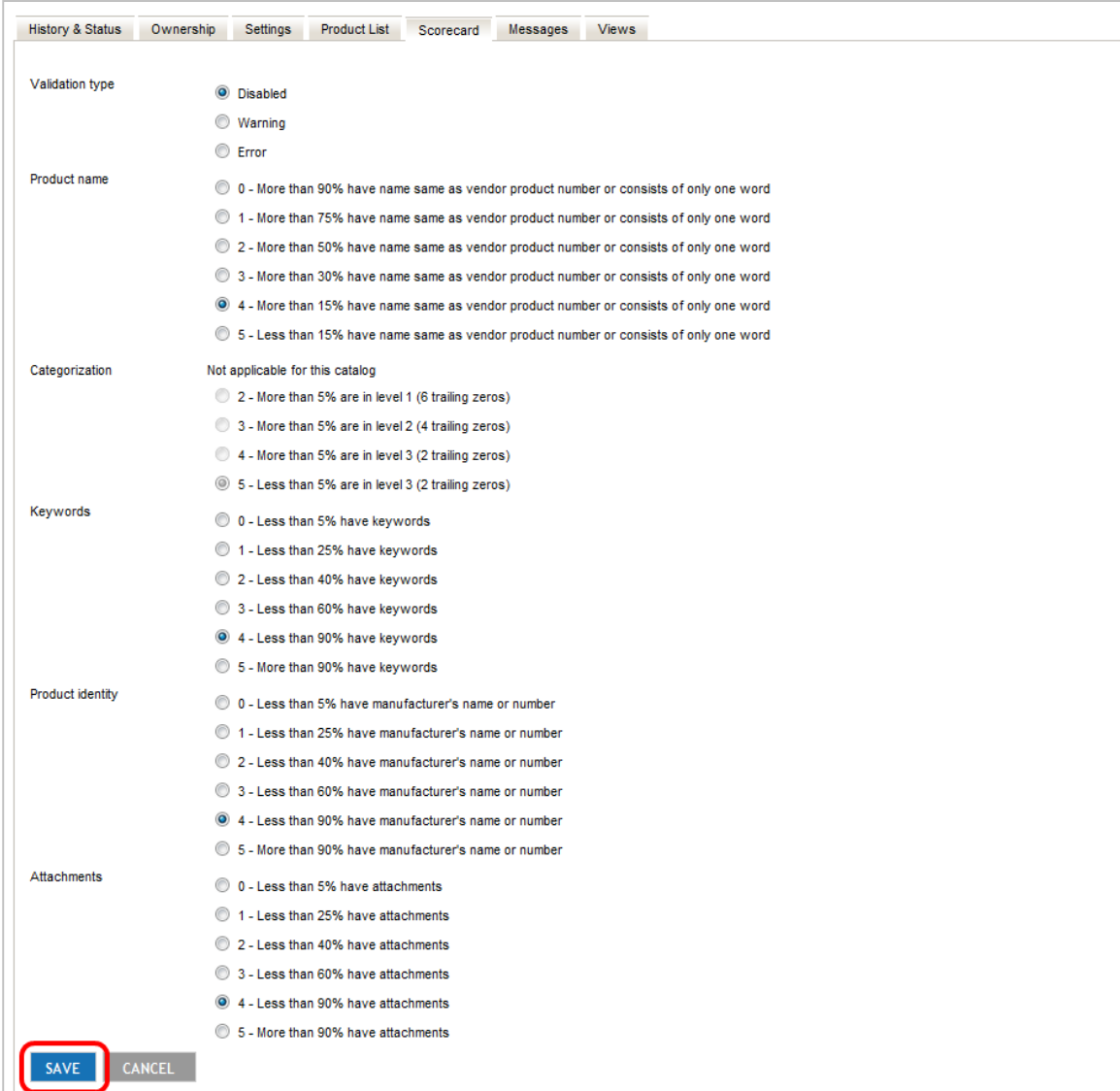
## 2.5.5 Scorecard

Content Workbench validates each catalog update, against a set of minimum content requirements.

Select minimum criteria for seven fields, and check if a catalog satisfies the criteria. If the catalog is invalid then it displays a warning message or rejects the catalog. The supplier can add more data to fulfill the requirement.

Following are the steps to select minimum criteria.

1. Click **Work List** or **My Catalogs** tab.
2. Find the catalog and click catalog name.
3. Click **Scorecard** tab.
4. Select **Validation type**.
5. Select minimum criteria for each field.
6. Click **Save** button.



History & Status Ownership Settings Product List **Scorecard** Messages Views

Validation type

- Disabled
- Warning
- Error

Product name

- 0 - More than 90% have name same as vendor product number or consists of only one word
- 1 - More than 75% have name same as vendor product number or consists of only one word
- 2 - More than 50% have name same as vendor product number or consists of only one word
- 3 - More than 30% have name same as vendor product number or consists of only one word
- 4 - More than 15% have name same as vendor product number or consists of only one word
- 5 - Less than 15% have name same as vendor product number or consists of only one word

Categorization

Not applicable for this catalog

- 2 - More than 5% are in level 1 (6 trailing zeros)
- 3 - More than 5% are in level 2 (4 trailing zeros)
- 4 - More than 5% are in level 3 (2 trailing zeros)
- 5 - Less than 5% are in level 3 (2 trailing zeros)

Keywords

- 0 - Less than 5% have keywords
- 1 - Less than 25% have keywords
- 2 - Less than 40% have keywords
- 3 - Less than 60% have keywords
- 4 - Less than 90% have keywords
- 5 - More than 90% have keywords

Product identity

- 0 - Less than 5% have manufacturer's name or number
- 1 - Less than 25% have manufacturer's name or number
- 2 - Less than 40% have manufacturer's name or number
- 3 - Less than 60% have manufacturer's name or number
- 4 - Less than 90% have manufacturer's name or number
- 5 - More than 90% have manufacturer's name or number

Attachments

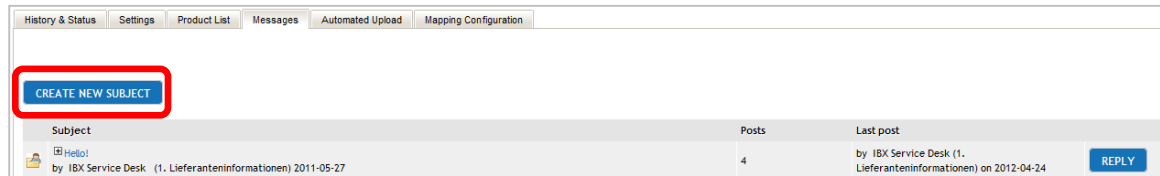
- 0 - Less than 5% have attachments
- 1 - Less than 25% have attachments
- 2 - Less than 40% have attachments
- 3 - Less than 60% have attachments
- 4 - Less than 90% have attachments
- 5 - More than 90% have attachments

**SAVE** CANCEL

**Figure 22: Catalog Details – Scorecard**

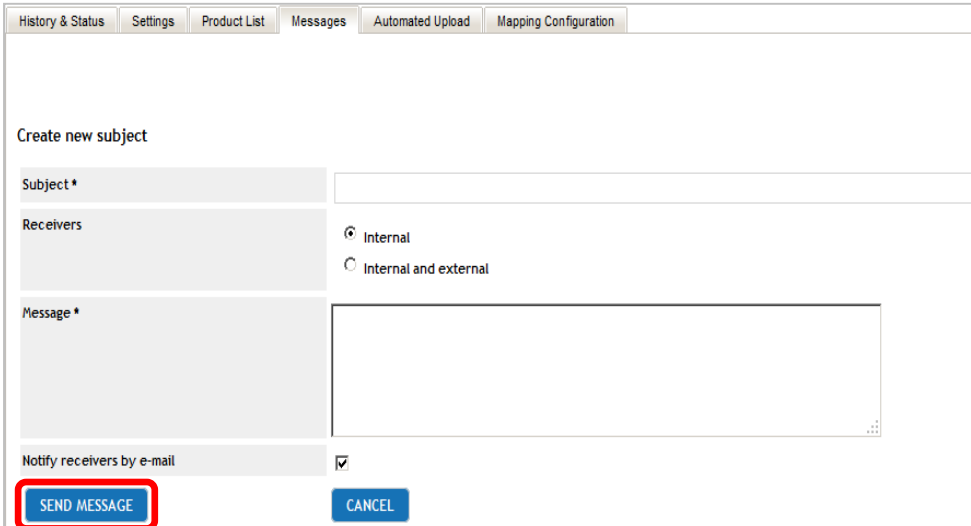
## 2.5.6 Messages

Messages are created in **Messages** section. A message board is a communication medium between buyers and suppliers.



**Figure 23: Catalog Details – Messages**

1. Click **Create new subject** button to create a subject.
2. Enter the subject, select the receiver type and enter the message.
3. Select **Notify receivers by e-mail** checkbox to enable email notification.
4. Click **Send message** button.



The screenshot shows the 'Create new subject' form in the 'Messages' section. The form has the following fields and controls:

- Subject \***: A text input field.
- Receivers**: A section with two radio button options: 'Internal' (selected) and 'Internal and external'.
- Message \***: A large text area for entering the message content.
- Notify receivers by e-mail**: A checkbox that is checked.
- SEND MESSAGE**: A blue button highlighted with a red box.
- CANCEL**: A blue button.

**Figure 24: Message Board - Create new subject**

Click **Reply** button to reply to a message. Enter the **Response** and click **Post response** button.



The screenshot shows the 'Reply to message' form in the 'Messages' section. The form has the following fields and controls:

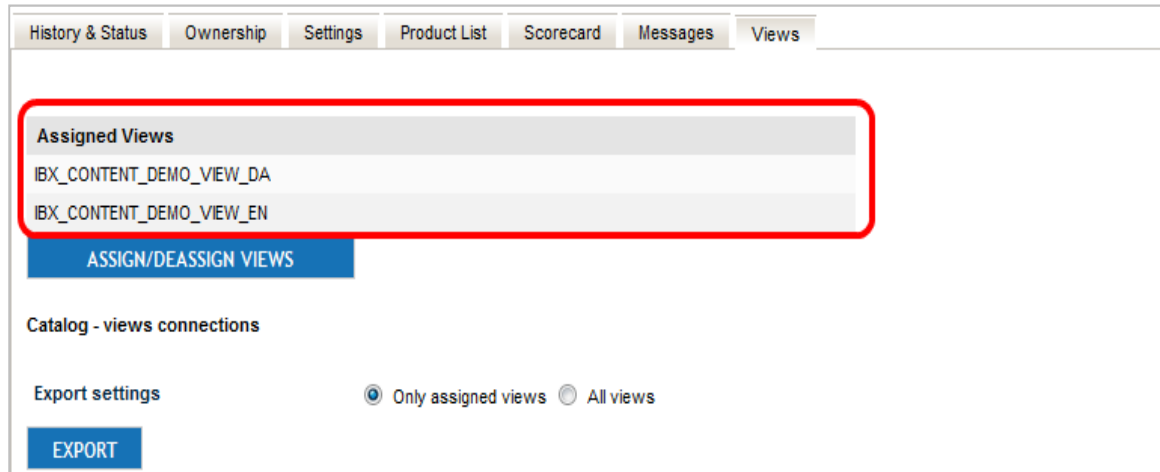
- Subject**: A text input field containing the text 'Hello!'.
- Response \***: A large text area for entering the response content.
- Notify receivers by e-mail**: A checkbox that is checked.
- POST RESPONSE**: A blue button highlighted with a red box.
- CANCEL**: A blue button.

**Figure 25: Message Board - Reply to message**

## 2.5.7 Views

**NOTE:** This tab is enabled for only administrators and catalog owners.

List of Views is displayed in **Views** section. The list includes all **Assigned Views** (views which the catalog is assigned to). Only the View IDs are displayed in the list.



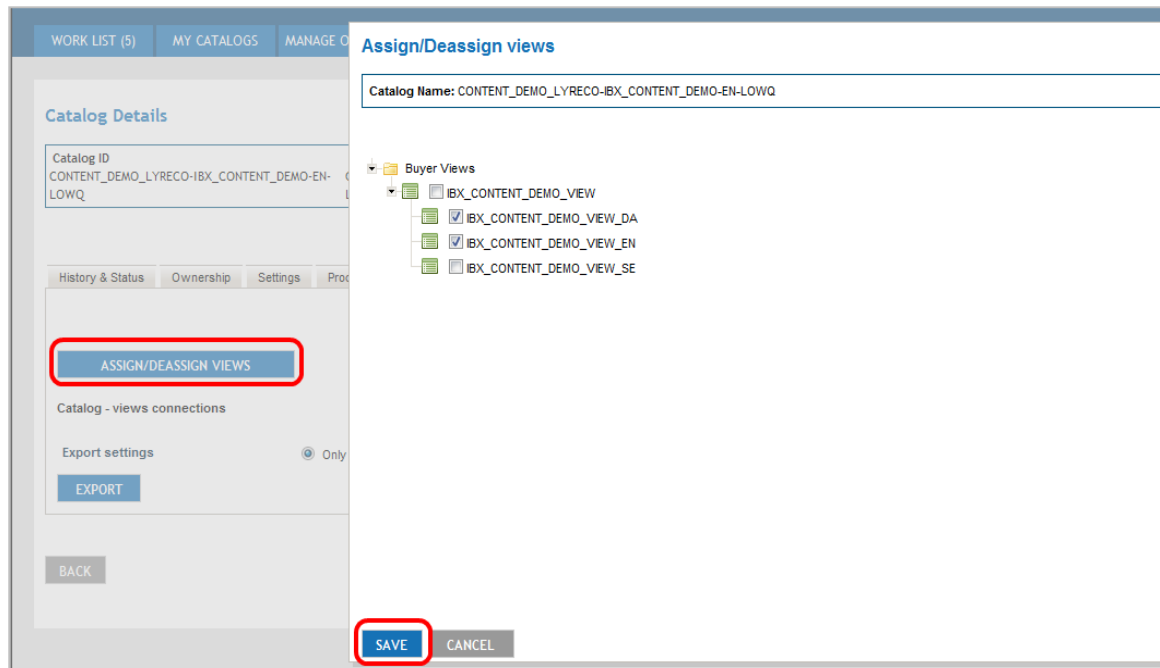
**Figure 26: Catalog Details - Views**

### Assign/Deassign views


**NOTE:** This Feature is enabled for only administrators.

Under **Views** section, you can assign/de-assign views to a catalog following below steps:

1. Click on the **Assign/Deassign views** button.
2. **Assign/Deassign views** window pops up.



**Figure 27: Assign/Deassign views**

3. Click on  icon to expand the views.

4. Browse the desired view(s) from the tree structure.
5. Select the checkbox (s).

NOTE: If a node is selected all sub-nodes are as well selected.

NOTE: If a node is de-selected all sub-nodes remains as they are.

NOTE: If a sub-node is selected the parent node stays as it was before.

NOTE: If a sub-node is de-selected the parent node stays as it was before.

6. Click on the **Save** button.

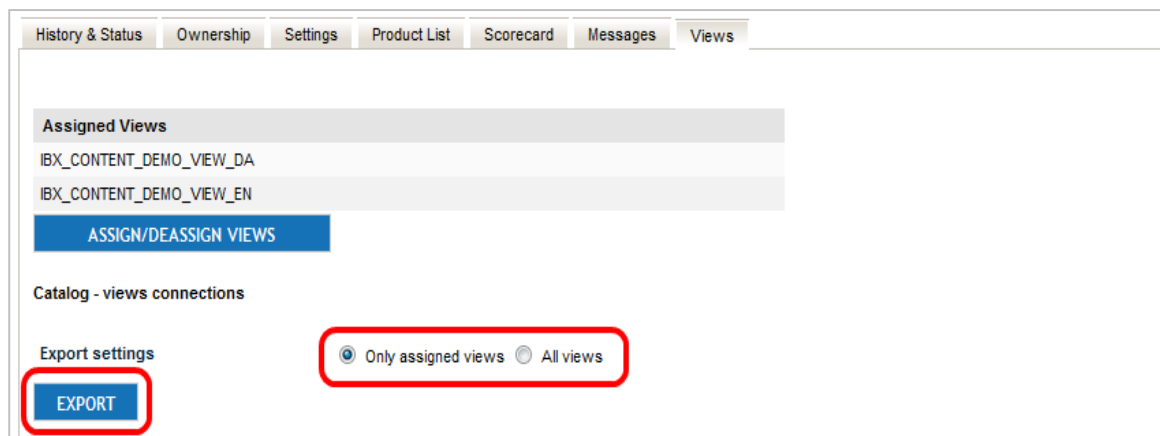
### Export List of Views

NOTE: This Feature is enabled for only administrators.

Under **Views** section, list of views assigned to the catalog can be exported to check them offline following below steps:

1. Select **Only assigned views** or **All views** radio buttons as required **Export settings**.
2. Click **Export** button.





NOTE: If **All views** radio button was selected, the list includes a marking of which catalogs are assigned to the views (marked with 1, the rest are marked with 0).




**Figure 28: Export List of Views**

## 2.6 Act as Supplier


A buyer can act as a supplier having sufficient access to update catalogs. **Act as Supplier** tab appears on the Content Workbench page if the user has sufficient access.

Supplier	Organization Name	TPID	Actions
freetext_ibx_content_demo	Free Text Vendors	FREETEXT_IBX_CONTENT_DEMO	 
smallb_ibx_content_demo	Small Business Catalog (Demo)	SMALLB_IBX_CONTENT_DEMO	 

**Figure 29: Act as Supplier**

**Act as supplier** tab displays a list of the suppliers to access. Click  icon to login as a supplier. The complete environment switches to supplier-side.

On the supplier-side, **Work List** and **My catalogs** tab contains catalogs and actions for the selected supplier.


Click  icon next to the login name to go back to buyer-side.

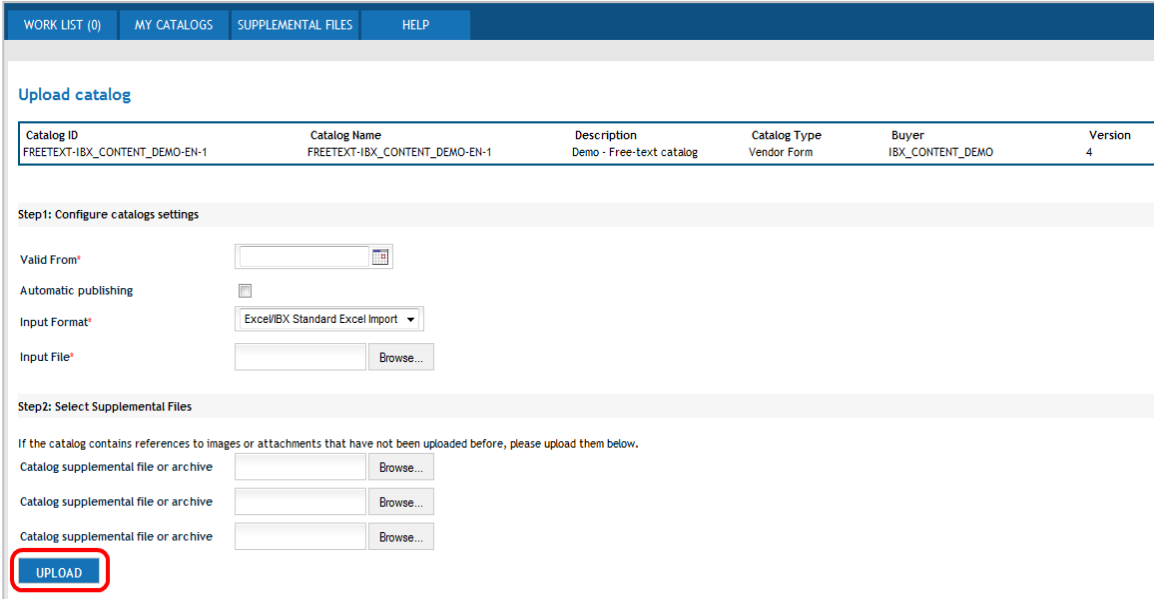
## 2.7 Upload Catalog

**NOTE:** Also, buyer managed catalogs can be uploaded automatically from a dedicated FTP folder, created by IBX Service Desk. For detail Refer **Automated Catalog Upload** section of **User Manual – IBX Content Workbench Supplier EN – R12.2**.

Catalogs are uploaded from the supplier side.

Perform the following steps to upload the Catalog:

1. Click **Act as supplier** tab.
2. Find the supplier and click **login as supplier** icon .
3. Click **My Catalogs** tab.
4. Find the catalog and click **Upload** link in **Actions** column.
5. Select **Valid From** date.
6. Select **Automatic publishing** check box to enable or disable sending a catalog directly for the buyer approval if it passes the validation.
7. Select **Input Format** from the drop-down list.
8. Browse and select the catalog input file.
9. Select pictures or attachments as supplemental files if not done earlier.
10. Click **Upload** button to upload the catalog.



Catalog ID	Catalog Name	Description	Catalog Type	Buyer	Version
FREETEXT-IBX_CONTENT_DEMO-EN-1	FREETEXT-IBX_CONTENT_DEMO-EN-1	Demo - Free-text catalog	Vendor Form	IBX_CONTENT_DEMO	4

Step 1: Configure catalogs settings

Valid From\*

Automatic publishing

Input Format\*

Input File\*

Step 2: Select Supplemental Files

If the catalog contains references to images or attachments that have not been uploaded before, please upload them below.

Catalog supplemental file or archive

Catalog supplemental file or archive

Catalog supplemental file or archive

**Figure 30: Supplier side - Upload Catalog**

Save time by using the multi upload function to upload the same catalog file to several catalogs. On **My Catalogs** tab, select the desired catalogs and click the **Upload** button. The catalog attachments are uploaded to all the selected catalogs at the same time.

**NOTE:** The check box will be inactive if the previous Catalog version is waiting for action.

## 2.7.1 View Progress

For details on the upload progress, check the progress report.

**NOTE:** The view progress report is only available till the catalog is **In progress** status.

1. Open the **Work List** tab.
2. Find the catalog and check if the status is **In progress**.
3. Click the **View Progress** link in the **Actions** column

For catalog updating find your catalog in [My Catalogs](#)  
55 catalog(s) wait for your action

Catalog Name	Catalog description	Buyer name	Version	Status	Status Date	Actions
test_1_6	fdfd	Test Buyer1	2	In progress	2012-05-14 10:06	<a href="#">View Progress</a>

**Figure 31: Supplier side - View Progress**

The **Catalog Process Monitor** page displays the status of each step of the catalog processing. Click **Refresh** button for detailed information on the process.

Step ID	Step name	Server name	Start	End	Duration	Status	Action
4	Int SSS Process	QACWPROC2	2012-05-14 09:54	2012-05-14 09:55	00:00:05.673	Finished	
5	Images Conversion	QACWPROC2	2012-05-14 09:55	2012-05-14 09:55	00:00:00.174	Finished	
6	Format Conversion	QACWPROC2	2012-05-14 09:55	2012-05-14 09:55	00:00:18.264	Finished	
7	Classification Mapping	QACWPROC2	2012-05-14 09:55	2012-05-14 09:55	00:00:01.844	Finished	
8	Int Rules	QACWPROC2	2012-05-14 09:55	2012-05-14 09:55	00:00:00.157	Finished	
9	Global Transformation	QACWPROC2	2012-05-14 09:55		00:00:26.821	In progress	

[REFRESH](#) [BACK](#)

**Figure 32: Catalog Process Monitor**



## 2.7.2 View Error Report

When Content Workbench uploads the Catalog, it will be processed through all products and validates the Catalog for any errors. The products are checked for any errors and displayed in the error report.

1. Click **Work List** tab.
2. Find the catalog and check the status is **Error**.
3. Click **View error report** link in catalog name row.

Choose to include warnings in the error report. The errors or error categories can be grouped. The catalog scores are displayed at the top of the report if automatic scorecard validation is activated.

The first column displays the catalog score and the second column displays the minimum requirements for each category. Update the Catalog and complete the minimum requirements to successfully upload the catalog.

Validation summary:		
Products:	50	
Prices:	350	
Errors:	5	
Warnings:	26	
Criterion	Calculated Score	Minimum Required Score
Product name	3 - More than 30% have name same as vendor product number or consists of only one word	4 - More than 15% have name same as vendor product number or consists of only one word
Product description	2 - More than 50% have no description or shorter than name or same as product name	4 - More than 15% have no description or shorter than name or same as product name
Pictures	3 - Less than 60% have pictures	5 - More than 90% have pictures
Categorization	4 - More than 5% are in level 3 (2 trailing zeros)	3 - More than 5% are in level 2 (4 trailing zeros)
Keywords	1 - Less than 25% have keywords	4 - Less than 90% have keywords
Product identity	3 - Less than 60% have manufacturer's name or number	4 - Less than 90% have manufacturer's name or number
Attachments	5 - More than 90% have attachments	4 - Less than 90% have attachments
Filter report: <input type="radio"/> Errors <input type="radio"/> Warnings <input checked="" type="radio"/> Both		

Figure 33: View Error Report

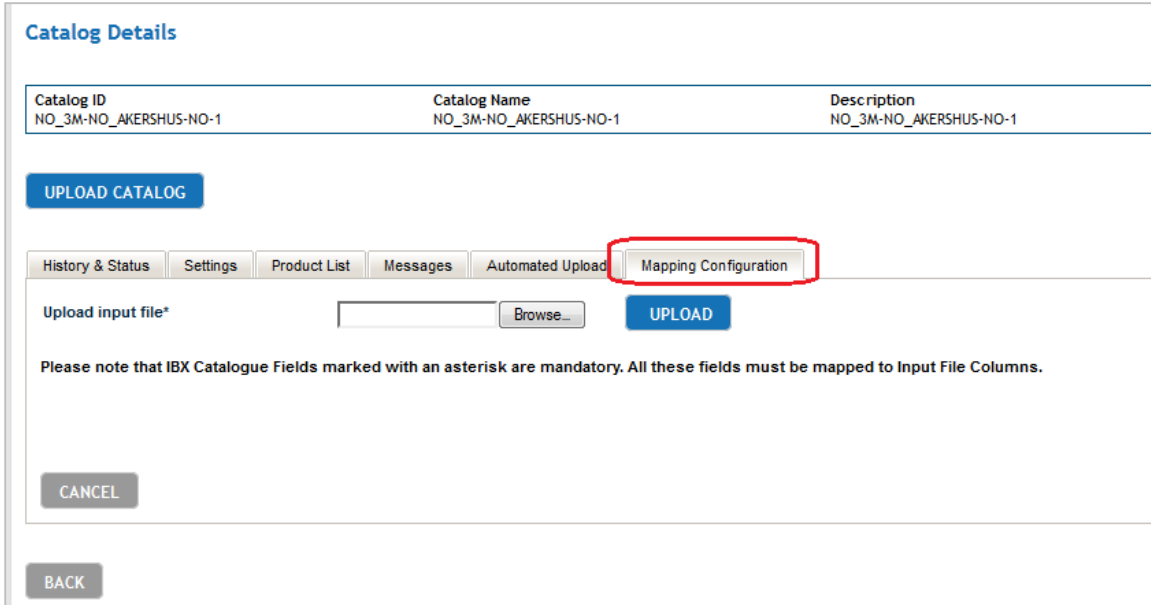
## 2.7.3 Update Catalog Using Excel/Flexible Input Import or CSV/Flexible Input Import

Catalogs can be updated using the **Flexible Input Import** option with Excel or CSV input files. The Flexible Input Import is an option that allows you to upload input files that are not according to the IBX standard.

Before uploading such input formats for one of your catalogs, you have to create a **Mapping Configuration** for that catalog. A **Mapping Configuration** represents an assignment of columns that you have in your Excel / CSV file, to IBX catalog fields.

To create a **Mapping Configuration** do the following steps:

1. Click **My Catalogs** tab.
2. Find the catalog you want to update and select it (by clicking on the catalog name).
3. Click **Mapping Configuration** tab.



**Catalog Details**

Catalog ID	Catalog Name	Description
NO_3M-NO_AKERSHUS-NO-1	NO_3M-NO_AKERSHUS-NO-1	NO_3M-NO_AKERSHUS-NO-1

**UPLOAD CATALOG**

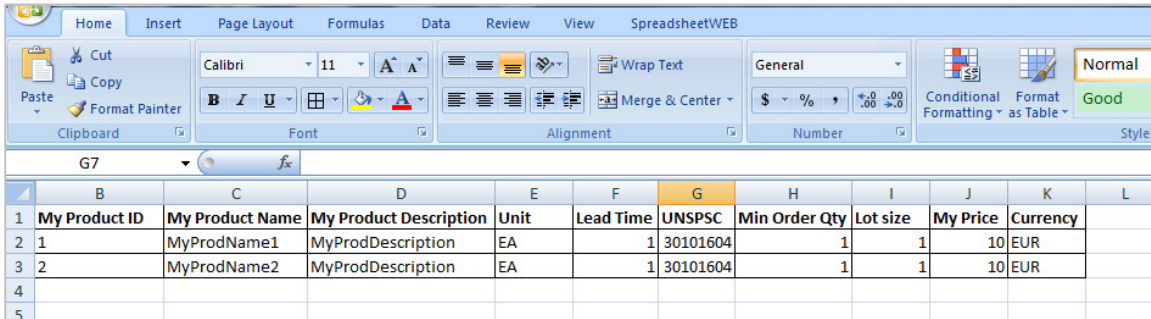
History & Status Settings Product List Messages Automated Upload **Mapping Configuration**

Upload input file\*

Please note that IBX Catalogue Fields marked with an asterisk are mandatory. All these fields must be mapped to Input File Columns.

**Figure 34: Catalog Details – Mapping Configuration Tab**

4. Click **Browse** button and select a file that contains all the columns you want to have in the new version of the catalog.



	B	C	D	E	F	G	H	I	J	K	L
1	<b>My Product ID</b>	<b>My Product Name</b>	<b>My Product Description</b>	<b>Unit</b>	<b>Lead Time</b>	<b>UNSPSC</b>	<b>Min Order Qty</b>	<b>Lot size</b>	<b>My Price</b>	<b>Currency</b>	
2	1	MyProdName1	MyProdDescription	EA	1	30101604	1	1	10	EUR	
3	2	MyProdName2	MyProdDescription	EA	1	30101604	1	1	10	EUR	
4											
5											

**Figure 35: Example of Input file used to create Mapping Configuration**

5. Click **Upload** button. Once the file has been uploaded, two new list boxes will appear on the screen:
  - **Input File Columns** – this list box contains the names of the columns from the file you have uploaded;
  - **IBX Columns** – this list box contains the names of the IBX columns (catalog fields) that you will have to map the columns in your input file to.

**Catalog Details**

Catalog ID	Catalog Name	Description
NO_3M-NO_AKERSHUS-NO-1	NO_3M-NO_AKERSHUS-NO-1	NO_3M-NO_AKERSHUS-NO-1

**UPLOAD CATALOG**

History & Status | Settings | Product List | Messages | Automated Upload | **Mapping Configuration**

Upload input file\*  **Browse...** **UPLOAD**

Please note that IBX Catalogue Fields marked with an asterisk are mandatory. All these fields must be mapped to Input File Columns.

Input File Columns:  **IBX Columns:**  **ADD**

**Input File Columns:**

- My Product ID
- My Product Name
- My Product Description
- Unit
- Lead Time
- UNSPSC
- Min Order Qty
- Lot size
- My Price
- Currency

**IBX Columns:**

- NONE
- VendorProductNo\*
- ProductName\*
- ProductDescription
- Unit\*
- LeadTime\*
- UNSPSC\*
- MinimumOrderQuantity\*
- LotSize\*
- Price\*
- Currency\*
- Price2
- MinimumOrderQuantity2
- Price3
- MinimumOrderQuantity3
- Price4
- MinimumOrderQuantity4
- Price5
- MinimumOrderQuantity5
- Price6

**CANCEL** **BACK**

**Figure 36: Mapping Configuration – Input File Columns and IBX Columns**

6. In **Input File Columns** list box, select the name of the column you want to map.
7. In **IBX Columns** list box, select the name of the IBX Field that corresponds to the column name that you have selected in **Input File Columns** list box (for example: **VendorProductNo.**, **ProductName**, **ProductDescription**, etc.).
8. Click **Add** button, and the list of mappings will appear.
9. Repeat steps 6 to 8 above, until you have mapped all the columns in your input file to IBX Columns.
10. Click **Save** button.

**Catalog Details**

Catalog ID NO_3M-NO_AKERSHUS-NO-1	Catalog Name NO_3M-NO_AKERSHUS-NO-1	Description NO_3M-NO_AKERSHUS-NO-1	Catalog Type Product Price	Buyer Akershus Universitetssykehus H
--------------------------------------	--	---------------------------------------	-------------------------------	---

**UPLOAD CATALOG**

History & Status Settings Product List Messages Automated Upload Mapping Configuration

Upload input file\*

Please note that IBX Catalogue Fields marked with an asterisk are mandatory. All these fields must be mapped to Input File Columns.

Input File Columns:  IBX Columns:

Input File Columns	IBX Columns	Actions
UNSPSC	UNSPSC*	<input type="button" value="Remove"/>
Lot size	LotSize*	<input type="button" value="Remove"/>
Min Order Qty	MinimumOrderQuantity*	<input type="button" value="Remove"/>
My Price	Price*	<input type="button" value="Remove"/>
My Product Description	ProductDescription	<input type="button" value="Remove"/>
Lead Time	LeadTime*	<input type="button" value="Remove"/>
My Product Name	ProductName*	<input type="button" value="Remove"/>
My Product ID	VendorProductNo*	<input type="button" value="Remove"/>
Currency	Currency*	<input type="button" value="Remove"/>
Unit	Unit*	<input type="button" value="Remove"/>

**Figure 37: Catalog Details – Mapping Configuration Created**

After you have assigned at least one column in your file to at least one IBX Column, click the **Preview**  button to check your mapping.

History & Status Settings Product List Messages Automated Upload Mapping Configuration

Upload input file\*

Please note that IBX Catalogue Fields marked with an asterisk are mandatory. All these fields must be assigned to Input File Columns.

Input File Columns:  IBX Columns:

Columns

Qty

Description

Name

ID

**Mapping Preview**

UNSPSC	Lot size	Min Order Qty	My Price	My Product Description	Lead Time	My Product Name	My Ven	Input File Assignments
UNSPSC	LotSize	MinimumOrderQuantity	Price	ProductDescription	LeadTime	ProductName	VendorProductNo	
30101604	1	1	10	MyProdDescription	1	MyProdName1	1	
30101604	1	1	10	MyProdDescription	1	MyProdName2	2	

**Figure 38: Catalog Details – Mapping Configuration – Preview Mapping Configuration**

After you have created the **Mapping Configuration** you will be able to update the catalog as described above in Chapter '2.3. Upload Catalog'.

**NOTE:** When you create a Mapping Configuration you have to assign columns in your input file to all IBX Columns that are mandatory: 'VendorProductNo.', 'Product Name', 'Product Description', 'Unit', 'Lead Time', Classification (UNSPC / eClass), 'Minimum Ordered Quantity', 'Lot Size', 'Price', 'Currency'. These IBX Columns are marked with an asterisk (\*) in the list box and in the mappings list.

NOTE: *Excel 2003-2010 files can be used as input files.*

NOTE: *Only the first sheet of an uploaded Excel input file will be read by the system, data on all other sheets will be ignored.*

NOTE: *Only tab-separated CSV files can be used.*


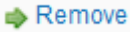
NOTE: *When creating a mapping configuration, you will be able to upload an input file containing a maximum of 250 columns.*

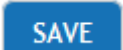
NOTE: *When creating a mapping configuration, the you will be able to create a maximum of 350 assignments (i.e. mappings of input file columns to IBX catalogue fields).*

NOTE: *The system will always interpret the first row of an Excel file as header (i.e. as containing column names). A file with the first row empty or with duplicate column names (same name for 2 or more columns) will not be accepted.*

NOTE: *One to many assignments of custom excel columns to CW Fields (such as 'Vendor Product No.', 'Product Name', 'Product Description', 'Price', etc.) are allowed.*

NOTE: *The functionality will include the 'Pretty Name' feature: input file transformation, validation, and scorecard warning & error messages will refer input fields by their pretty name (if any).*

If you want to modify a **Mapping Configuration**, you can do so by using the **Add**  button to map a column that was not mapped before, or the **Remove**  link to remove any assignment in the list.

After you have finished modifying the **Mapping Configuration** click the **Save**  button to apply your changes.

NOTE: *After you modify the Mapping Configuration make sure that all mandatory IBX Columns have been assigned a column in your input file.*

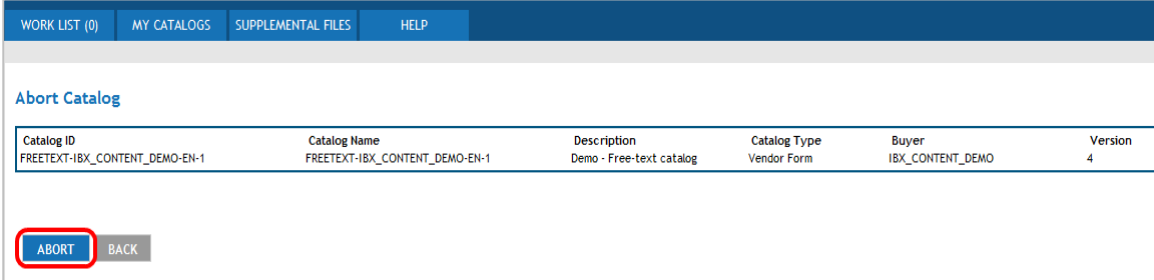
If you wish to delete the **Mapping Configuration** click the **Delete**  button.

NOTE: *Before deleting a Mapping Configuration, make sure that you no longer wish to upload catalog input files matching that mapping.*

## 2.8 Abort Catalog

If **Automatic publishing** is turned off or if the catalog file contains errors, the catalog upload can be aborted.

11. Click **Work List** tab.
12. Find the catalog and check if the status is **Error** or **Awaiting publishing**.
13. Click **Abort** link in the catalog name row.
14. Confirm the action by clicking the **Abort** button.



Catalog ID	Catalog Name	Description	Catalog Type	Buyer	Version
FREETEXT-IBX_CONTENT_DEMO-EN-1	FREETEXT-IBX_CONTENT_DEMO-EN-1	Demo - Free-text catalog	Vendor Form	IBX_CONTENT_DEMO	4


**ABORT** **BACK**

**Figure 39: Abort Catalog**

## 2.9 Publish Catalog

The catalog can be published if the **Automatic publishing** is turned off and the catalog upload is successful.

1. Click **Work List** tab.
2. Find the catalog and check if the status is **Awaiting publishing**.
3. Click **Publish** link.
4. You can change **Valid From** date if required.
5. Click the **Publish Catalog** button.

When the Catalog is published, switch back to buyer-side by clicking the  icon to approve and activate the Catalog.



## 2.10 Catalog Details

Click a Catalog name to view the supplier-side details.

### 2.10.1 History & Status

This tab displays update versions and old Catalog files can be downloaded to check for error reports.

1. Click **Work List** or **My Catalogs** tab.
2. Find the catalog and click catalog name.

Version	File Name	Upload	Validate	Publish/Abort	Approve/Reject	Enrich	Schedule activation	Activate	Actions
16	20120119_de_leferanteninfo1-de_luftdeut-de-1 V1 1.xls	2012-01-19 03:37 Helena Nix-Belz(Buyer)	 with warnings 2012-01-19 03:37 system	Published 2012-01-19 03:37 system	approved 2012-01-19 03:37 system		activation scheduled 2012-01-19 03:37 system	Activated 2012-01-19 03:40 system	No actions
		2012-01-19 03:37	 with warnings	Published	approved		activation scheduled	Activated	

**Figure 40: Buyer Side - History & Status**

Click the file name to download old catalog files, or click the **No errors** or **Error** links to view old upload reports.

Please note that only a limited number of versions are available for download.

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