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OpenText Active Catalogue CE 21.2 Browser Interface User Guide for Vendors

This guide explains how to view, maintain, and download catalogue data using the browser interface to the Active Catalogue hosted application.

April 2021

OpenText™ Active Catalogue CE 21.2 Browser Interface User Guide for Vendors

Rev.: 6 March 2021

This documentation has been created for software version 21.2

It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at <https://knowledge.opentext.com>.

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Introduction

OpenText™ Active Catalogue is the leading product information database for the electronic exchange of product information between retailers and vendors in the GM&A, grocery, hardlines, and other industries worldwide. It contains more than 220 million Global Trade Item Numbers (GTINs) from over 7,000 vendors and grows daily.

OpenText Active Catalogue enables vendors to focus on product catalogue content and sales instead of storing and communicating product information in different formats for different customers.

The section is organized as follows:

- ["About This Guide" on page 1.](#)
- ["Audience" on page 2.](#)
- ["Minimum System Requirements" on page 3.](#)
- ["Conventions Used in This Guide" on page 3.](#)
- ["Accessing Product Documentation" on page 4.](#)
- ["Retailers and Vendors" on page 4.](#)
- ["Contacting Technical Support" on page 5.](#)

About This Guide

This guide explains how to view, maintain, and download catalogue data using the browser interface to the hosted application. Similar information is provided in the application's online help.

The guide is organized as follows:

- [Chapter 1, "Overview," on page 6](#) describes the basic functions and navigation for OpenText Active Catalogue.
- [Chapter 2, "Working with User Profiles," on page 21](#) explains how an administrator (super user) can add and maintain users for their Catalogue account. It also describes how an administrator can reset passwords, view permissions for defined roles, and view users assigned to a role.
- [Chapter 3, "Working With Access Rights," on page 38](#) explains how to set up and maintain security for OpenText Active Catalogue. Access rights are set up and maintained for accounts and users.
- [Chapter 4, "Working with Accounts," on page 49](#) describes maintenance of your account and how to view information about trading partners. Account information includes account details (for you and your trading partners) such as

address and contact data, GS1 (UCC/EAN) Company Prefix List information, and custom field definitions.

- [Chapter 5, "Working with Attribute Filters," on page 68](#) explains how to apply, create, and modify attribute filters to restrict the display and export of attributes to only those attributes relevant to your business.
- [Chapter 6, "Finding and Viewing Data," on page 76](#) explains how to find and view vendor catalogue data.
- [Chapter 7, "Working with Color and Size Codes," on page 102](#) explains how to find, view, and download the GS1 US color and size codes. In addition, it describes how to request a new size code from via email.
- [Chapter 8, "Working with Compliance Checks," on page 120](#) describes the compliance checks that are available using OpenText Active Catalogue, explains how to enable the compliance checks, and discusses the options that are available if your data does not pass a compliance check.
- [Chapter 9, "Maintaining Catalogue Data," on page 124](#) explains how to maintain your product catalogue including how to edit values for custom fields.
- [Chapter 10, "Analytics and Reports," on page 169](#) describes several reports that you can run that provide information about how you and your trading partners use or access Catalogue data.
- [Chapter 11, "Working with CSV Text Files to Upload Data," on page 196](#) explains how to upload small volumes of catalogue item or image data using a comma separated values (CSV) text file. Text file upload is useful for vendors with smaller catalogues who may have too many items to enter using the browser user interface (UI) but too few items to need the scalability of the EDI or Web Services formats.
- [Chapter 12, "Working with Downloads," on page 207](#) explains how to select and download catalogue data on a one-time basis.
- [Chapter 13, "Working with EDI Data," on page 228](#) explains how to use the EDI Management Console (EMC) to monitor EDI files that you send to OpenText Active Catalogue and identify errors encountered while processing them. It also describes how to submit sample EDI to Catalogue.
- [Chapter 14, "Online Correction of Errors," on page 235](#) explains how to find and correct errors encountered while processing a batch EDI document or EDI sample data.
- [Appendix A "GTIN Number Structures," on page 256](#) describes the various GTIN types.
- [Appendix B "Container and Component GTIN Codes," on page 258](#) defines the codes used with container and component GTINs in OpenText Active Catalogue.

Audience

The audience for this guide is personnel who use the browser interface to perform tasks in the following areas of activity:

- Access—View and maintain retailer access to a vendor catalogue.

- Account Maintenance—View and maintain company data such as contact information.
- Attribute Filters—View, apply, and maintain filters to restrict the display and export of GTIN attributes.
- Catalogue Data—Find, view, maintain, upload, and download catalogue data.
- Error Processing—View, correct, and resubmit or delete error transactions sent through the batch interface.

Minimum System Requirements

The minimum system requirements for using the browser interface are:

- Internet Access
 - Internet Browser: IE 8, IE 9, IE 10, Firefox, Chrome, Edge
 - IE 8 and Firefox 36 are certified on Windows.
 - IE 9, IE 10, Firefox, Chrome, and Edge are supported, but not certified.
- Note:** In IE 8, IE 9, and IE 10 you must apply Compatibility View for the numbering and all text to display correctly in the online help system.
- For IE 8, click **Tools > Compatibility View Settings**. In the dialog box, either add the Catalogue URL to the Compatibility View, or select the **Display all websites in Compatibility View** check box, and click **Close**.
 - For IE 9, after accessing Catalogue, click the “broken page” icon to the right of the Address bar to enable compatibility view.
 - For IE 10, see Microsoft’s instructions for compatibility mode.
- 2 GB RAM

Note: Windows operating systems are supported. Catalogue may run fine in browsers on alternate operating systems, but OpenText does not support defects or issues that are unique to those non-Windows operating systems.

Conventions Used in This Guide

This guide uses the following conventions:

This convention...	Indicates...	Example...
Bold text	Button, or field names, menu options, and hyperlinks	Save

Accessing Product Documentation

You can access all of the OpenText product documentation for OpenText Active Catalogue from within the Catalogue application. Most documentation is delivered in Adobe Acrobat PDF format. To read and print the documents, you will need Adobe Acrobat Reader, a free product from Adobe Systems. For information about downloading and installing Acrobat Reader, see the section, "[Installing Adobe Reader.](#)"

To access the product documentation

- 1 Log in to OpenText Active Catalogue.
- 2 Click **Product Documentation > All Documents.**
The Product Documentation List page opens. A list of the documents is displayed.
- 3 You have the option to open the document or save it to your computer. Do one of the following:
 - To open a document, click the document link. The document opens in a separate window.
 - To save the document to your computer, right click the document link and select **Save Target As.** The Save As window opens. Navigate to the location where you want to save the document, and click **Save.** The document is saved to your computer.

Installing Adobe Reader

Since most OpenText product documentation is delivered in Adobe Acrobat PDF format, you will need Adobe Reader to read and print the documentation. Adobe Reader is a free product from Adobe Systems.

To download and install Adobe Reader

- 1 Launch a Web browser and navigate to <http://get.adobe.com/reader>
 - 2 Download and install Adobe Reader. Follow the screens, accepting the defaults.
- You can now access OpenText product documentation by double-clicking the PDF file.

Retailers and Vendors

In this guide the term *retailers* includes retailers, grocers, distribution centers, and third parties that extract data from OpenText Active Catalogue. An example of a third party is a company that makes tags attached to apparel.

The term *vendors* includes vendors, manufacturers, distributors, brokers, and wholesalers.

Contacting Technical Support

To contact OpenText Cloud Support Services (CSS) for assistance in North America:

- Email cataloguesupport@opentext.com
- Call 1-800-334-2255

To contact OpenText Cloud Support Services (CSS) for assistance in Europe, refer to the OpenText website at <http://www.opentext.com> for available phone numbers.

This section provides an overview of the OpenText Active Catalogue browser interface and includes information about navigating the application, menus, buttons, logging in and out, entering dates, success and error messages, timing out, and other general matters.

This section is organized as follows:

- ["OpenText Active Catalogue Browser Interface" on page 6.](#)
- ["Logging In and Out of OpenText Active Catalogue" on page 7.](#)
- ["Account Lock Out" on page 7](#)
- ["Changing Your Password" on page 8.](#)
- ["Resetting Your Password" on page 9.](#)
- ["Login Page Links" on page 10.](#)
- ["Navigating OpenText Active Catalogue" on page 10.](#)
- ["Using Online Help" on page 18.](#)
- ["Entering Dates" on page 18.](#)
- ["Discarding Changes Before Saving" on page 19.](#)
- ["Success and Error Messages" on page 19.](#)
- ["Timing Out" on page 19.](#)
- ["Printing from OpenText Active Catalogue" on page 19.](#)

OpenText Active Catalogue Browser Interface

The OpenText Active Catalogue browser interface is a Web-based, hosted application.

Use the application to do the following:

- Maintain and download catalogue data.
- Maintain retailer access to your catalogue.
- Maintain your own account information.
- Create and apply attribute filters to restrict the display/export of GTIN attributes.
- View, correct, and resubmit error transactions sent through the batch interface.

Logging In and Out of OpenText Active Catalogue

To log in

- 1 Access the Internet by opening your preferred browser.
- 2 Type <https://catalogue.gxs.com> in the Address field. The Catalogue Login page opens.

Catalogue Login

Network ID

User ID

Password

Login

[Reset Password](#)

- 3 Enter your **Network ID**, **User ID**, and **Password**. All three fields are case-sensitive.

Note: Press **Tab** to move to the next field.

- 4 Press **Enter** or click **Login**.

The Selection Code List page opens.

Note the following:

- The first time you log into Catalogue after OpenText completes your account set up, the Change User Password page opens, and you are prompted to change your password. Thereafter, if your password has expired, or you have reset your password, you are also prompted to change your password. See ["Changing Your Password" on page 8](#).
- After 5 invalid password attempts in 5 minutes, an error message displays, and you are locked out of your account for 15 minutes.

To log out

- 1 Click **Logout** in the upper right corner.

[Logout](#) | [OpenText](#) | [Help](#) | [Support](#)

A message box opens.

- 2 To log out, click **Yes**. The OpenText Active Catalogue login page or customer interface page opens.

Note: If you have records in the download basket, you will receive a message asking if you want to log out without downloading. To complete the download, click **No**. Navigate to the Download Basket page and complete the download. See ["Completing a One-Time Batch File Download" on page 212](#).

Account Lock Out

After 5 invalid password attempts in 5 minutes, an error message displays, and you are locked out of your account for 15 minutes.

Changing Your Password

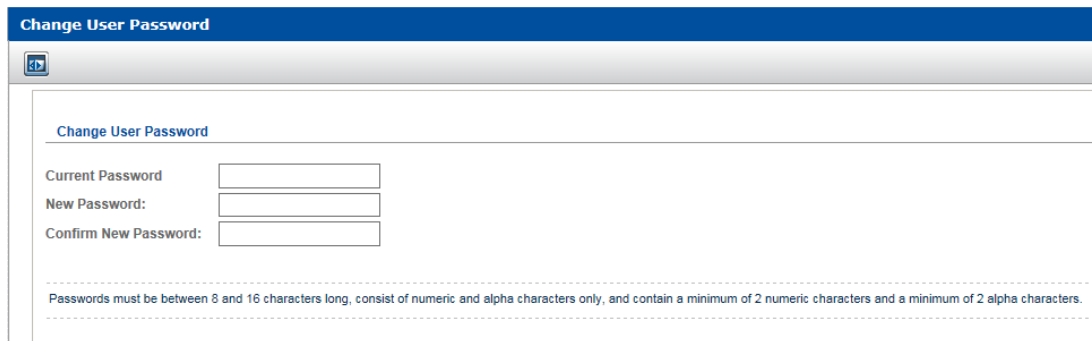
You can change your password at any time using the procedure below (**Account > Change Password**).

There are also times when you *must* change your password. In the following situations, after you log in, the Change User Password page opens, and you are prompted to change your password.

- You log into Catalogue for the first time after OpenText completes your account set up.
- Your password expired.
- You reset your password.

To change your password

- 1 Click **Account > Change Password**. The **Change User Password** page opens.



- 2 Type the current password in the **Current Password** box
- 3 Type the new password in the **New Password** box and again in **Confirm New Password** box. You must adhere to the password validation requirements described in ["Password Requirements" on page 8](#).
- 4 To save the new password, click **Save**. A message indicates that your password was changed successfully.

Password Requirements

Passwords must meet the validation requirements described in the table below. If your password does not meet the requirements, you will be prompted to type a different password.

Password Description	Requirement
Password different from User ID	The password cannot be the same as the User ID that is defined for the browser interface user (UI).
Minimum number of characters	10
Maximum number of characters	16
Minimum number of numeric characters	2
Minimum number of alpha characters	2
Maximum number of times a character can be used in a password	4

Password Description	Requirement
Distinct password	The new password must be different from the previous 5 passwords.
Case sensitivity	Characters are case sensitive.
Upper and lower case alpha characters	Both upper and lower case alpha characters are required, but a mix of both is not required.
Special characters	Special characters are allowed as follows: <ul style="list-style-type: none"> ■ Characters allowed ~`!@#\$\$%^&*()_+=={ []\:"';,./? ■ Characters not allowed < >
Expiration time	The browser interface user's (UI) password will expire 90 days after being changed.

Resetting Your Password

If you have forgotten your password, your password has expired, or your account has been locked, you can reset your password. A new randomly-generated password is sent in an email to the user's email address (not the account's email address).

Note: Do *not* use this procedure to change your password. See "[Changing Your Password](#)" on page 8 for information on changing your password.

- 1 Access the Internet by opening your preferred browser.
- 2 Type <https://catalogue.gxs.com> in the Address field. The Catalogue Login page opens.

The screenshot shows the 'Catalogue Login' page. It features three input fields: 'Network ID', 'User ID', and 'Password'. Below these fields is a 'Login' button and a blue link labeled 'Reset Password'.

- 3 Enter your **Network ID** and **User ID**. Both fields are case-sensitive.
- 4 Click the **Reset password** link.
- 5 A dialog box asks you to confirm that you want to reset your password. Click **OK** if you want to reset your password.
- 6 A message states that if you entered valid network and user IDs, an email with reset instructions was sent to your (the user's) email address with the subject line:

OpenText Active Catalogue - user password reset

Emails are sent from auto_notify@opentext.com to the user's email address (set up by a OpenText administrator for individual users).

Note: If you do not have a user contact email address set up, the reset password is sent to OpenText Cloud Support Services (CSS) at cataloguesupport@opentext.com.

- 7 Check your email for your new password. The email contains the following information:

Password for user ID ' *YourUserID* [accountId= *YourAccountID*] has been reset to '*NewPassword*'

where *YourUserID*, *YourAccountID*, and *NewPassword* are actual values.

- 8 Log into Catalogue using this new password.
- 9 You will be prompted to change your password when you log in. See ["Changing Your Password"](#) on page 8.

Login Page Links

On the Login page, in the upper right corner, click **OpenText** to access the OpenText website.

[Logout](#) | [OpenText](#) | [Help](#) | [Support](#)

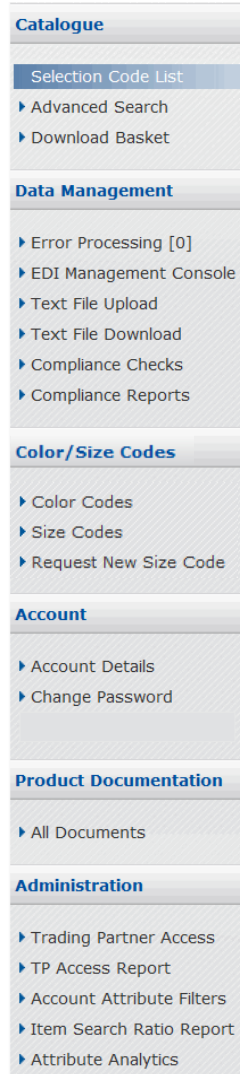
Navigating OpenText Active Catalogue

The following sections describes the navigation tools that are available for working in OpenText Active Catalogue:

- Navigation panel - See ["Navigation Panel"](#) on page 12.
- Button Bar -See ["Button Bar"](#) on page 14.
- Filter Bar - See ["Filter Bar"](#) on page 15.
- Search Bar - See ["Search Bar"](#) on page 15.
- Auto-Fill - See ["Auto-Fill"](#) on page 16.
- Browse Bar - See ["Browse Bar"](#) on page 17.
- Page Size - See ["Page Size"](#) on page 17
- Hyperlinks - See ["Hyperlinks"](#) on page 17.
- Sorting a List - See ["Sorting a List"](#) on page 17.
- Find Link - See ["Find Link"](#) on page 17.

Navigation Panel

The navigation panel appears on the left side of the page. It is divided into categories. When you first log in to Catalogue, by default, the first two categories are expanded and the remaining categories are collapsed. To expand or collapse a category, click the category name (for example, Data Management).



To use the navigation panel

- 1 Click a category name to expand a category and display the list of headings below it.
- 2 Click one of the headings to open the corresponding page.

A shortcut notation will be used for procedures in this guide. For example, Click **Data Management > Error Processing** means that you click on the Data

Management category (if it is not already expanded) and then click on the Error Processing heading below it to open the Error Processing page.

Note: The navigation menu remains accessible from all pages. Categories and headings within a category vary by account and user access rights.

Category	Headings
Catalogue	<ul style="list-style-type: none"> ■ Selection Code List—View the list of selection codes in your catalogue. See "Finding and Viewing Data" on page 76. ■ Advanced Search—Find a selection code, product, or GTIN. See "Finding and Viewing Data" on page 76. ■ Download Basket—Select and download catalogue data on a one-time (also called ad hoc) basis. See "Working with Downloads" on page 207.
Data Management	<ul style="list-style-type: none"> ■ Error Processing—Display error sets. See "Online Correction of Errors" on page 235. ■ EDI Management Console—Monitor EDI files sent to Catalogue and interpret resulting EDI errors. Submit sample EDI data in the demo environment for validation. See "Working with EDI Data" on page 228. ■ Text File Upload—Upload small volumes of catalogue data using a comma separated values (CSV) text file. See "Working with CSV Text Files to Upload Data" on page 196. ■ Text File Download—Display text file download results. See "Working with Downloads" on page 207. ■ Compliance Checks—Validate Catalogue data against a set of pre-determined rules. View and edit compliance configuration settings. Review available options for data that is non-compliant. See "Working with Compliance Checks" on page 120. ■ Compliance Reports—A one-time report run against the current state of data that exists within a catalogue. You can compare your catalogue to an attribute filter and obtain a report on the attributes that are not populated. See "Analytics and Reports" on page 169.
Color/Size Codes	<ul style="list-style-type: none"> ■ Color Codes—Access, search, synchronize, and download the latest GS1 US color code information. See "Working with Color and Size Codes" on page 102. ■ Size Codes—Access, search, synchronize, and download the latest GS1 US size code information. See "Working with Color and Size Codes" on page 102. ■ Request New Size Code—Request a new GS1 US size code. See "Working with Color and Size Codes" on page 102.
Account	<ul style="list-style-type: none"> ■ Account Details—Edit your account data, maintain/activate your GS1 company prefixes, create custom fields. See "Working with Accounts" on page 49. ■ Change Password—Change your user password. See "Changing Your Password" on page 8.

Product Documentation	<ul style="list-style-type: none"> ■ All Documents—Access all product documentation.
Administration	<ul style="list-style-type: none"> ■ Trading Partner Access—Manage retailer access to your catalogue. View address, contact, and other information for retailers. See “Working With Access Rights” on page 38. ■ TP Access Report—View a list of all trading partners who have accessed your catalogue. See “Analytics and Reports” on page 169. ■ Account Attribute Filters—Display attribute filters. See “Working with Attribute Filters” on page 68. ■ Item Search Ratio Report—Each time your trading partners (retailers) search your catalogue, Catalogue keeps track of the number of times they find and do not find the GTINs they are looking for. View the actual number of hits (GTINs found) and misses (GTINs not found) for each trading partner that searches your catalogue, as well as the hit and miss percentages. Note: The report is available to vendors only if they have the option turned on and they have at least one retailer tracking missed GTINs. See “Analytics and Reports” on page 169. ■ Attributes Analytics—View your account to see which attributes you are populating for your items (GTINs). Enables you to see the attribute data that a retailer sees. See “Analytics and Reports” on page 169.













Button Bar

Click a button on the button bar to execute an action or open a page.



The following buttons are used in Catalogue. Move your cursor over a button to see its definition.

Button	Description
	Click Show/Hide to show or hide the navigation panel.
	Click Add to add a new record to your catalogue.
	Click Edit to update an existing record in your catalogue (including mass update).
	Click Delete to delete a record from your catalogue.
	Click Copy to copy an existing GTIN that used as the basis for a new GTIN.
	Click Save to save changes.
	Click Download to add a record to the download basket.

Button	Description
	Click Download to download GS1 US color or size code information.
	Click to mark an error document as Read (that is, change the typeface to plain).
	Click to mark an error document as Unread (that is, change the typeface to bold).
	Click Revert to return error functions to their previously submitted values.
	Click Move to move a Product and all of its GTINs and associated attributes from one Selection Code to a different Selection Code.
	Click Copy Data to Table to copy the data displayed on a list page to a table so that you can copy and paste the data from the table to your own application or save the data to a CSV text file.
	Click Container to view a list of container GTINs for the selected component.
	Click Components to view a list of component GTINs in the selected container GTIN.
	Click Auto Calendar to display a calendar from which to select a date.
	Click Cancel to cancel an EDI document from being processed.
	Click Default Profile to view a default subscription profile.
	Click Add to add a subscription profile.
	Click Edit to edit a subscription profile.

Filter Bar

Most pages have a filter bar. Filter options are specific to each page. Depending on the option, you can type a value in a field or choose a value from a drop-down list. To clear filter selections, click **Clear Filter**. Any filter criteria is removed and the full list of records is displayed on the page.

By default, for each new session of Catalogue, the filter bar is open (expanded) when you first log in and open a page; the filter options available for that page display. You can open or close the filter bar by clicking on it. If you open the search bar, the filter bar closes; you cannot use both at the same time.

Note: The system remembers whether you have the filter bar or search bar open; when you navigate to other pages, the bar that was open remains open (for that session).

Search Bar

Most pages have a search bar. There are a few exceptions such as the color and size code pages. Also, except for the EQUAL MULTI option for a Product, the search bar displays the same search options that are available by clicking **Catalogue >**

Advanced Search (which opens the Find Catalogue Data page). Searches have no context or relation to the current page; searches are performed from the “top” level. Having the search bar on all pages provides a convenient way to search without having to go back to the Find Catalogue Data page.

By default, for each new session of Catalogue, the search bar is closed when the page opens. You can open or close the search bar by clicking on it. If you open the search bar, the filter bar closes; you cannot use both at the same time.

Note: The system remembers whether you have the filter bar or search bar open; when you navigate to other pages, the bar that was open remains open (for that session).

Even though the search functionality is identical on the search bar and the Advanced Search (Find Catalogue Data) page (except for this difference), the options are displayed slightly differently in the two places. On the search bar, when you select an option from the drop-down list, the appropriate corresponding options (drop-down lists and fields) display on the page.

For example, if you select Selection Code from the drop-down list, EQUAL and BEGIN display in the adjacent drop-down list.



However, if you select Product from the drop-down list, the Identifier, Description, and Compressed options appear.



Depending on which of these options you select (Identifier, Description, or Compressed), the drop-down list options for BEGIN, EQUAL, and CONTAINS will change. For example, if you select Description or Compressed, EQUAL is the only valid value that appears.

See [“Finding and Viewing Data” on page 76](#) for information about using the specific search options.

Note: You cannot enter a copyright or registered trademark in a search field; no results are returned.

Auto-Fill

Some fields have an auto-fill feature. As you type a value in the field, a drop-down list appears and is automatically populated with choices (listed alphabetically) that match the values you are typing. A limited number of choices are displayed. If the choice you want is not displayed, enter more or different characters to narrow the choices. The more characters you type, the closer the match, and the less items that appear in the drop-down list. You can select an item from this list.

Browse Bar

Use the browse bar to display specific pages of data



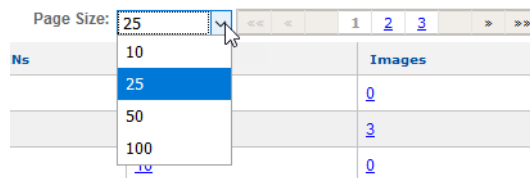
Click any of the four angle buttons in the browse bar to display data as follows:

- << the first page of data
- < the previous page of data
- > the next page of data
- >> the last page of data

The numbers in the center indicate the numbers of the pages of data. Click a number to display a particular page of data. For example, click **4** to display data on page 4.

Page Size

Use the Page Size drop-down list to select how many records you want to display on a single page.



Hyperlinks

Click underlined text hyperlinks to open a page that lists records referred to by the hyperlink (for instance, under Products, click **28** to display the 28 products that exist under the selection code 003).

Selection Code	Description	Products
001	Intimate Apparel	23
002	description	2
003	Sel Code new	28

Sorting a List

You can sort a list by a column heading if the column heading is underlined. Click on the column heading to sort by ascending or descending order. Click on it again to reverse the order. An arrow next to the heading indicates that the list is sorted by that column. If the arrow points up, the list is sorted in ascending order. If the arrow points down, the list is sorted in descending sort order.

Find Link

You can use the **Find** link to help you populate the color and size codes when you add a GTIN. On the GTIN Detail (New) page, for the Color Code or Size Code fields, click the blue **Find** link to open a text box to the right of the link. Begin typing a description or code in the box. The drop-down list selections adjust to

show only those descriptions or codes that match your criteria. When you make a selection, the selection populates the actual field, and the Find text box disappears.

NRF Color Code	<input type="text" value="Find blue dark"/>
Color Description	401 - Blue Group: Dark Blue
	402 - Blue Group: Dark Blue
NRF Size Code	403 - Blue Group: Dark Blue
	404 - Blue Group: Dark Blue

Using Online Help

To open the online help file, click **Help** in the upper right corner of OpenText Active Catalogue.

[Logout](#) | [OpenText](#) | [Help](#) | [Support](#)

Note: In IE 8, IE 9, and IE 10, you must apply Compatibility View for the numbering and all text to display correctly in the online help system.

- For IE 8, click **Tools > Compatibility View Settings**. In the dialog box, either add the Catalogue URL to the Compatibility View, or select the **Display all websites in Compatibility View** check box, and click **Close**.
- For IE 9, after accessing Catalogue, click the “broken page” icon to the right of the Address bar to enable compatibility view.
- For IE 10, see Microsoft’s instructions for compatibility mode.

Contacting Support

To access information to contact support, click **Support** in the upper right corner of OpenText Active Catalogue.

[Logout](#) | [OpenText](#) | [Help](#) | [Support](#)

Entering Dates

Select your preferred date format on the Account Details page (**Account > Account Details**). You must enter dates in this format, and dates will be displayed in this format. See [“Maintaining Your Account” on page 49](#).

Some date fields in Catalogue offer the option of using Auto Calendar to enter a date instead of typing in the date. If the Auto Calendar icon appears next to a date field, this option is available.

To use Auto Calendar

- 1 Click **Auto Calendar** to open Auto Calendar.
- 2 Use the < > buttons in Auto Calendar to navigate to a month.
- 3 Click a date to enter it in the field.

Discarding Changes Before Saving

To discard unsaved changes on a page (that is, restore the page to its status before you entered but did not save new data), click **Discard**.

Success and Error Messages

After executing actions, a success or error message appears below the filter bar and above the main page area.

Timing Out

OpenText Active Catalogue will automatically log you out after 20 minutes of inactivity.

Printing from OpenText Active Catalogue

To print a page, click **Print** on the browser toolbar.

This section explains how an administrator (super user) can add and maintain users for their Catalogue account. It also describes how an administrator can reset passwords, view permissions for defined roles, and view users assigned to a role.

This section is organized as follows:

- [“Overview” on page 21](#)
- [“Self-Service Administration by Super Users” on page 22](#)
- [“Adding a User” on page 22](#)
- [“Updating User Information” on page 24.](#)
- [“Deleting a User” on page 26.](#)
- [“Activating a User” on page 27](#)
- [“Deactivating a User” on page 28](#)
- [“Changing a User’s Password” on page 29](#)
- [“Copying User Data to a Table” on page 30](#)
- [“Resetting Passwords for Multiple Users” on page 33](#)
- [“Viewing Access Permissions for Role Profiles” on page 34](#)
- [“Viewing Users Assigned to a Role” on page 35](#)
- [“Changing a User’s Role” on page 36](#)

Overview

There are two types of administrators:

- The OpenText administrator (referred to as the super admin)
- Retailer, vendor, and distributor administrators (referred to as super users).

Only the OpenText administrator can create a super user for an account. There is a limit of three super users per account.

Contact OpenText Cloud Support Services (CSS) to create a super user for your account. See [“Contacting Technical Support” on page 5.](#)

Self-Service Administration by Super Users

Retailer, vendor and distributor administrators (super users) can add and maintain users for their account. They can also reset passwords, view permissions for defined roles, and view users assigned to a role.

There are two types of users:

- **Interactive**—A retailer, vendor or distributor who uses the UI to access Catalogue.
- **Batch**—A retailer who uses an EDI 832 document to send EDI requests to Catalogue to retrieve data, and a vendor or distributor who uses an EDI 832 or EDI 888b document to load their data into Catalogue.

Note: Super users can only add interactive users. They cannot add batch users.

If a retailer wants to send EDI requests to Catalogue to retrieve data or a vendor or distributor wants use EDI 832 to load data into Catalogue, the OpenText administrator (super admin) must add a separate batch user for the account (with corresponding batch password).

Contact OpenText Cloud Support Services (CSS) to add a batch user to your account. See [“Contacting Technical Support” on page 5](#).

Adding a User

Use this procedure to add a user.

Note: Super users can only add interactive users. They cannot add batch users or other super users.

To add a user

- 1 Click **Account > User Profiles**.

The User Profiles - User List page opens displaying a list of all users for the account.

The screenshot shows the 'User Profiles - User List' page. At the top, there is a search bar and a filter section with 'User ID' and 'User Name' input fields, and 'Filter' and 'Clear Filter' buttons. Below this, account details are displayed: Account Name: KIBBLES N BITS, Account Number: 125103335555, and Account Type: Manufacturer. A table lists the users with columns for User ID, User Name, Network ID, Default Attribute Filter, User Type, Role Name, and Status. The table contains three rows: BATCH (Vendor Batch password), batchs (batchs), and bill001 (bill).

<input type="checkbox"/>	User ID	User Name	Network ID	Default Attribute Filter	User Type	Role Name	Status
<input type="checkbox"/>	BATCH	Vendor Batch password	BATCH	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	batchs	batchs	batchs	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	bill001	bill	bill	GMA Filter Extended	Interactive	Vendor_Admin	Active

- 2 Click **New User**.

The User Profile Setup and Maintenance page opens.

3 Complete the fields as described in the following table.

Field	Description
User ID	Required. Must be unique. The following guidelines are recommended: <ul style="list-style-type: none"> Type the first 2 letters of your company name and the last 3 numbers of the Service Order. The system allows both lowercase and uppercase letters. Add an A to the end of the first user ID. If you create more than one interactive user, add a B to the end of the second user ID, etc. <p>Note: In the past, guidelines dictated that the letter C be used for the batch password (created by the OpenText super admin). In those cases where you want to continue with these guidelines, skip to the letter D for the third interactive user ID, E for the fourth interactive user ID, and so forth.</p>
Network ID	Required. From the drop-down list of network IDs defined by users already created under the account, select a network ID.
User Name	Required. Type the user’s first and last name.
User Type	Required. Interactive is selected by default. Super users cannot create a batch user.
User Contact Email	Required. Type the user’s email address. This is important. If the user forgets their password and clicks the Reset Password link on the Catalogue Login page, or if the super user admin resets the user’s password, the new temporary password is sent to this email address.
User Role	Required. Select a role which determines the user’s edit and view permissions for various functional modules in their catalogue. Some of the most common roles are: <ul style="list-style-type: none"> Vendor_Admin - This role allows the user to download, upload, view, edit, and delete data from the catalogue. Vendor_bView - This role gives a user read-only access to the catalogue. <p>To view the existing roles in your Catalogue account, see “Viewing Access Permissions for Role Profiles” on page 34</p>
Default Attribute Filter	Required. Select a default attribute filter. The user can change their default filter in their account details.

Field	Description
User Status	Required. <ul style="list-style-type: none"> ■ Active - You want the user to be active. ■ Inactive - You do not want the user to be active.
Password Expired	Select the check box if you want to require the user to change the password when they first log in.
New Password	Type a password that contains the following: <ul style="list-style-type: none"> ■ At least 10, but no more than 16 characters in length ■ A minimum of 2 numeric characters ■ A minimum of 2 alpha characters ■ Both uppercase and lowercase alpha characters ■ Special characters are allowed as follows: <ul style="list-style-type: none"> ■ Characters allowed ~`!@#%&*()_+={} []\:'",./? ■ Characters not allowed < > Note: For more details, see "Password Requirements" on page 8.
Confirm New Password	Re-type the password you entered for New Password.

- 4 Repeat Steps 2 and 3 as needed to add additional interactive passwords.
- 5 Click **Save**. A message indicates if the information has been saved successfully.

Updating User Information

Use this procedure to update the following user information:

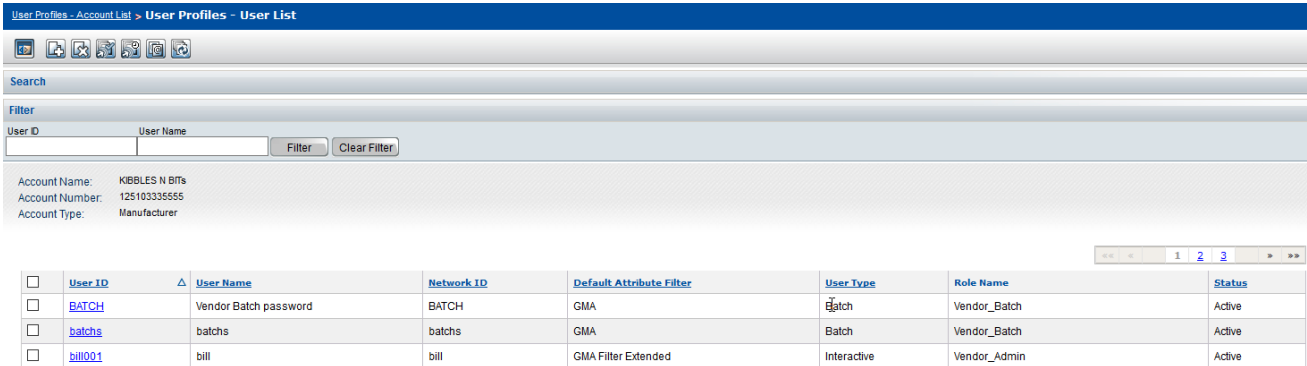
- Network ID
- User Name
- User Contact Email
- User Role
- Default Attribute Filter
- User Status
- Password

Note: Super users can only update interactive users. They cannot update batch users or other super users.

To update user information

- 1 Click **Account > User Profiles**.

The User Profiles - User List page opens, displaying a list of all users for the account.



2 Filter the list by the User ID or User Name of the user you want to update.

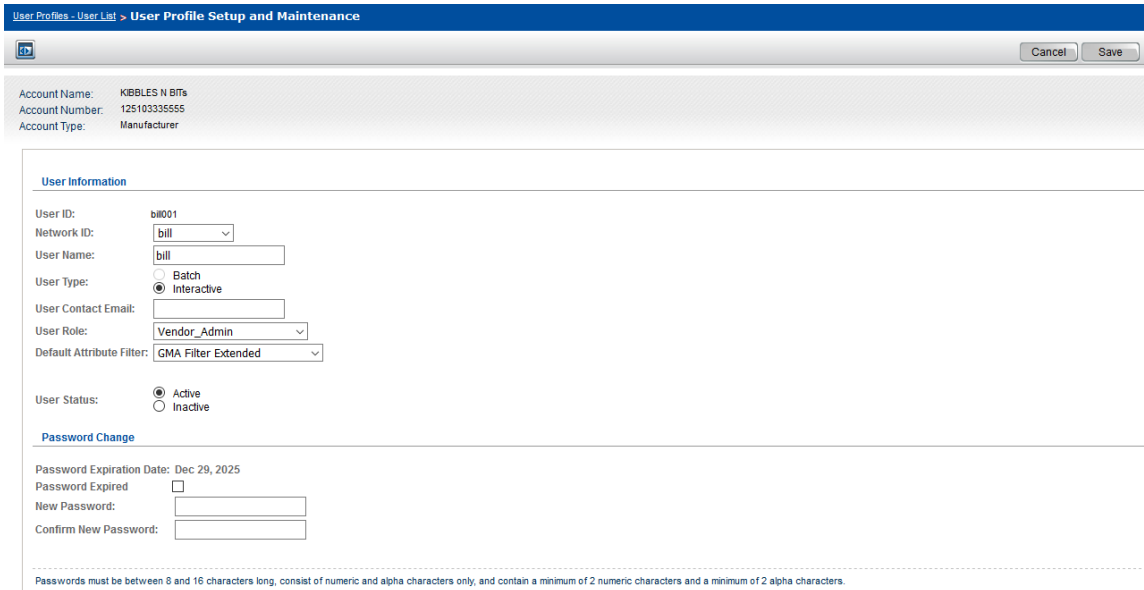
a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.

b Click **Filter**.

The page refreshes to display the results.

3 In the User ID column, click the hyperlink of the user you want to update.

The User Profile Setup and Maintenance page for the user opens.



4 Update the appropriate fields as described in the following table.

Field	Description
Network ID	Required. From the drop-down list of network IDs defined by users already created under the account, select a network ID.
User Name	Required. Type the user's first and last name.
User Type	Required. Interactive is selected by default. Super users cannot create a batch user.
User Contact Email	Required. Type the user's email address. This is important. If the user forgets their password and clicks the Reset Password link on the Catalogue Login page, or if the super user admin resets the user's password, the new temporary password is sent to this email address.

Field	Description
User Role	<p>Required. From the drop-down list, select a role which determines the user’s edit and view permissions for various functional modules in their catalogue. Some of the most common roles are:</p> <ul style="list-style-type: none"> ■ Vendor_Admin - This role allows the user to download, upload, view, edit, and delete data from the catalogue. ■ Vendor_bView - This role gives a user read-only access to the catalogue. <p>To view the existing roles in your Catalogue account, see “Viewing Access Permissions for Role Profiles” on page 34.</p>
Default Attribute Filter	<p>Required. Select a default attribute filter. The user can always change their default filter in their account details.</p>
User Status	<p>Required.</p> <ul style="list-style-type: none"> ■ Active - You want the user to be active. ■ Inactive - You do not want the user to be active.
Password Expired	<p>Select the check box if you want to require the user to change the password when they first log in.</p>
New Password	<p>Type a password that contains the following:</p> <ul style="list-style-type: none"> ■ At least 10, but no more than 16 characters in length ■ A minimum of 2 numeric characters ■ A minimum of 2 alpha characters ■ Both uppercase and lowercase alpha characters ■ Special characters are allowed as follows: <ul style="list-style-type: none"> ■ Characters allowed ~`!@#\$%^&*()_+--={}[]\:"';,./? ■ Characters not allowed < > <p>Note: For more details, see “Password Requirements” on page 8.</p>
Confirm New Password	<p>Re-type the password you entered for New Password.</p>

5 Click **Save**. A message indicates if the information has been saved successfully.

Deleting a User

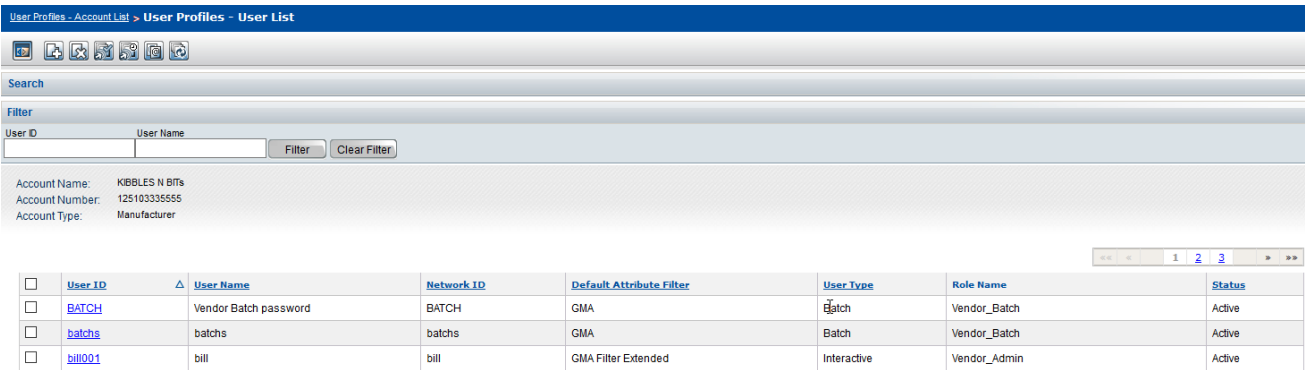
Use this procedure to delete a user.

Note: Super users can only delete interactive users. They cannot delete batch users or other super users.

To delete a user

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.



- 2 Filter the list by the User ID or User Name of the user you want to delete.
 - a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.
 - b Click **Filter**.
The page refreshes to display the results.
 - 3 Do one of the following:
 - In the column to the left of the User ID column, select one or more check boxes next to the user(s) you want to delete.
 - In the column to the left of the User ID column, select the check box at the top. This action selects *all* users on the page. Clear the check boxes of those users you do not want to delete.
- Note:** You cannot delete a batch user or other super users.
- 4 Click **Delete**. A dialog box asks you to confirm your action.
 - 5 Click **OK**. The user(s) is deleted.

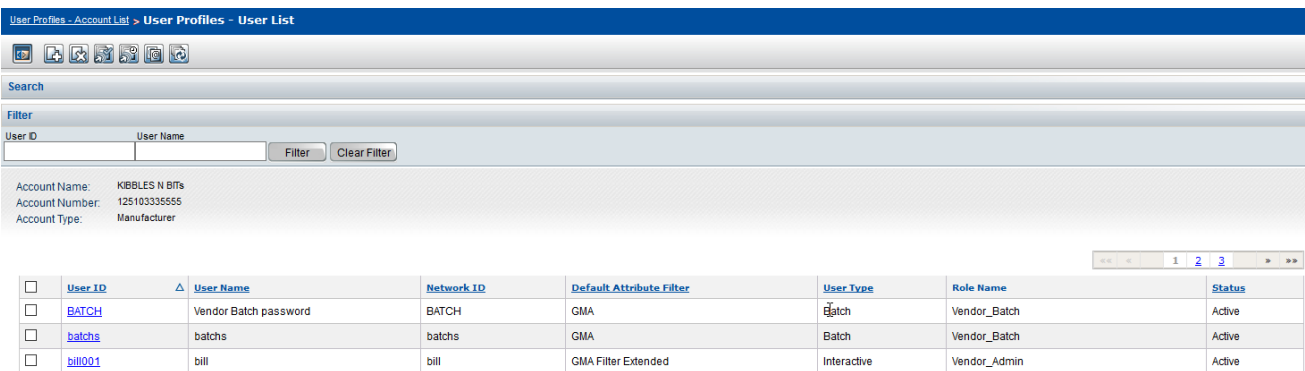
Activating a User

Use this procedure to activate a user.

To activate a user

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.



- 2 Filter the list by the User ID or User Name of the user you want to activate.
 - a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.
 - b Click **Filter**.
The page refreshes to display the results.
 - 3 Do one of the following:
 - In the column to the left of the User ID column, select one or more check boxes next to the user(s) you want to activate.
 - In the column to the left of the User ID column, select the check box at the top. This action selects *all* users on the page. Clear the check boxes of those users you do not want to activate.
- Note:** You cannot activate a batch user or other super users.
- 4 Click **Activate**. A dialog box asks you to confirm your action.
 - 5 Click **OK**. The user(s) is activated.

Deactivating a User

Use this procedure to deactivate a user.

To deactivate a user

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.

<input type="checkbox"/>	User ID	User Name	Network ID	Default Attribute Filter	User Type	Role Name	Status
<input type="checkbox"/>	BATCH	Vendor Batch password	BATCH	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	batchs	batchs	batchs	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	bill001	bill	bill	GMA Filter Extended	Interactive	Vendor_Admin	Active

- 2 Filter the list by the User ID or User Name of the user you want to deactivate.
 - a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.
 - b Click **Filter**.
The page refreshes to display the results.
- 3 Do one of the following:
 - In the column to the left of the User ID column, select one or more check boxes next to the user(s) you want to deactivate.

- In the column to the left of the User ID column, select the check box at the top. This action selects *all* users on the page. Clear the check boxes of those users you do not want to deactivate.

Note: You cannot deactivate a batch user or other super users.

- 4 Click **Deactivate**. A dialog box asks you to confirm your action.
- 5 Click **OK**. The user(s) is deactivated.

Changing a User's Password

Use this procedure to change a user's password.

To change a user's password

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.

The screenshot shows the 'User Profiles - User List' page. At the top, there is a breadcrumb trail: 'User Profiles - Account List > User Profiles - User List'. Below this is a search bar with 'Filter' and 'Clear Filter' buttons. The account details are: Account Name: KIBBLES N BITS, Account Number: 125103335555, Account Type: Manufacturer. The table below lists three users:

<input type="checkbox"/>	User ID	User Name	Network ID	Default Attribute Filter	User Type	Role Name	Status
<input type="checkbox"/>	BATCH	Vendor Batch password	BATCH	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	batchs	batchs	batchs	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	bill001	bill	bill	GMA-Filter Extended	Interactive	Vendor_Admin	Active

- 2 Filter the list by the User ID or User Name of the user whose password you want to change.
 - a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.
 - b Click **Filter**.
The page refreshes to display the results.
- 3 In the User ID column, click the hyperlink of the user whose password you want to change.

The User Profile Setup and Maintenance page for the user opens.

4 In the Password Change section at the bottom of the page, complete the fields as described in the following table.

Field	Description
Password Expired	Select the check box if you want to require the user to change the password when they first log in.
New Password	Type a password that contains the following: <ul style="list-style-type: none"> ■ At least 10, but no more than 16 characters in length ■ A minimum of 2 numeric characters ■ A minimum of 2 alpha characters ■ Both uppercase and lowercase alpha characters ■ Special characters are allowed as follows: <ul style="list-style-type: none"> ■ Characters allowed ~`!@#\$\$%^&*()_+=={ } [] \ : ; ' , . / ? ■ Characters not allowed < > <p>Note: For more details, see "Password Requirements" on page 8.</p>
Confirm New Password	Re-type the password you entered for New Password.

5 Click **Save**. A message indicates if the information has been saved successfully. The user’s password is reset and a new temporary password is sent to the user’s email address specified in the User Contact Email field (see ["Adding a User"](#) on page 22).

Copying User Data to a Table

You can use the "Copy Data to Table" feature to download all users from an account into an application such as Excel.

The feature copies to a table the user data that displays on the User Profiles - User List page. You can view the data in the table or save the data to a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application, such as Excel.

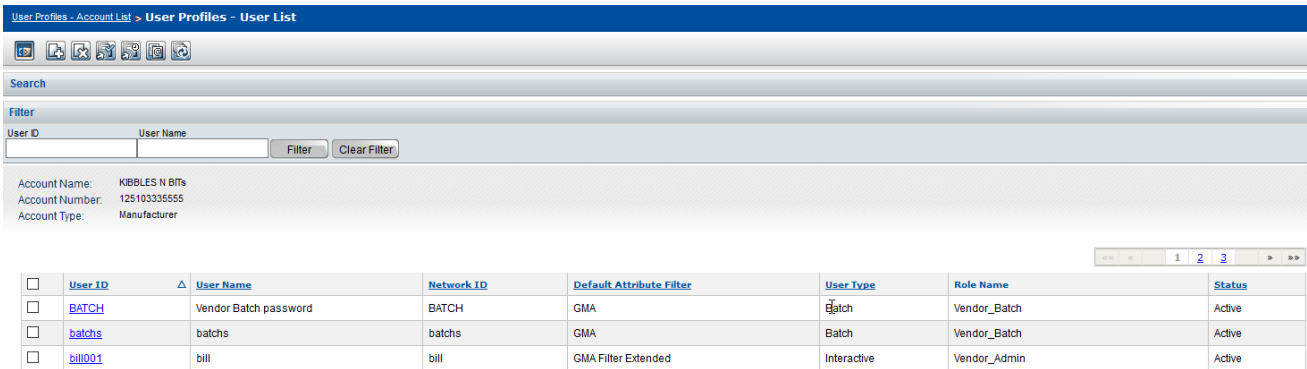
Note: Be sure to set the required Internet Explorer options so you can successfully use this feature with IE. See ["Setting Internet Explorer \(IE\) Options for Copy Data to Table"](#) on page 98.

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data table will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the table will not display.

To copy the user data

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.

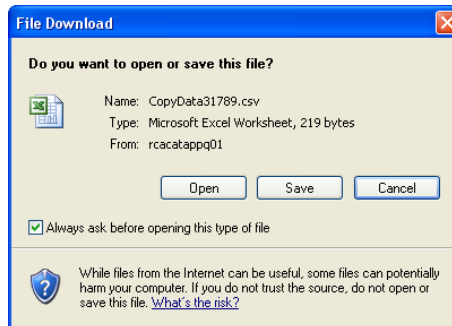


2 On the User List page, click **Copy Data to Table**.

Note: User data is copied for all pages regardless of the page that displays.

One of the following occurs:

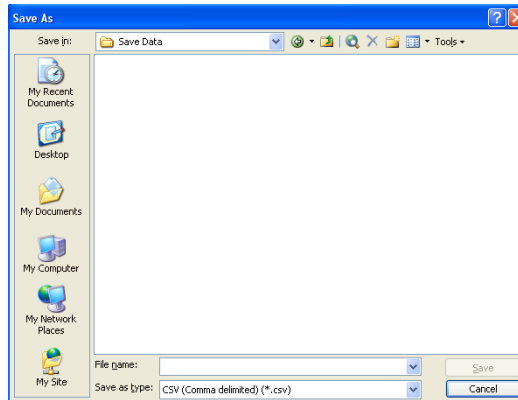
- A table opens displaying the user data. Go to Step 4 (you can skip Step 3 unless the File Download dialog box opens).
- The File Download dialog box opens asking if you want to open the file or save it to your computer.



Note: The File Download dialog box will always open unless you deselect the **Always ask before opening this type of file** check box. This prevents the "Do you want to open or save this file" question from being asked every time you want to copy data to a table. Continue with Step 3.

3 Do one of the following:

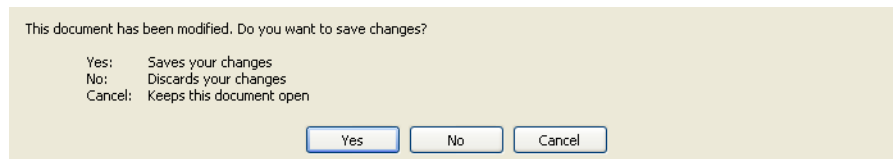
- **Open** - To display the Product data in a table format, click **Open**. Go to Step 4.
- **Save** - To save the file as a CSV text file that you can open later in Microsoft Excel, click **Save**. The Save As dialog box opens.



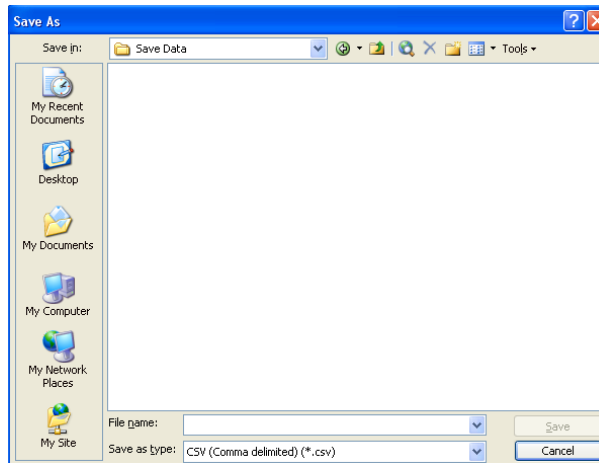
Do all of the following:

- Navigate to the location where you want to save the file.
 - In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, MensShirts.csv
 - Click **Save**. The file is saved to the location you selected.
 - **Cancel** - To cancel your action, click **Cancel**.
- 4** Once the table is open, you can select rows and columns of Product data to copy. When you want to close the table, click the X in the upper right corner of the window.

If you modified the table, a dialog box appears when you close the window and asks if you want to save your changes.



To save your changes, click **Yes**. The Save As dialog box opens.



Do all of the following:

- Navigate to the location where you want to save the file.
- In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, MensShirts.csv
- Click **Save**. The file is saved to the location you selected.

Resetting Passwords for Multiple Users

You can use the “Reset Password” feature to reset the passwords of multiple users at the same time. To reset a password for a single user, see “Updating User Information” on page 24.

To reset passwords for multiple users

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.

Account Name: KBBLES N BITS
Account Number: 125103335555
Account Type: Manufacturer

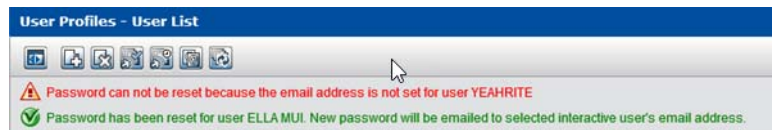
<input type="checkbox"/>	User ID	User Name	Network ID	Default Attribute Filter	User Type	Role Name	Status
<input type="checkbox"/>	BATCH	Vendor Batch password	BATCH	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	batchs	batchs	batchs	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	bill001	bill	bill	GMA Filter Extended	Interactive	Vendor_Admin	Active

Note: Passwords for multiple users can be reset only for the page that displays. If you have multiple pages of users, search for the users and/or navigate to the page of users whose passwords you want to reset.

- 2 Select the check boxes next to the names of the users whose passwords you want to reset.
Note: You cannot reset batch passwords or passwords for other super users. User IDs for which you can reset passwords display as blue links.
- 3 Click **Reset Password**. A dialog box asks if you are sure you want to reset the password for the selected user(s).
- 4 Click **OK**.

One or both of the following occur:

- If an email address has been specified for a user(s), the password(s) is reset and an email is sent to each user’s email address specified in the User Contact Email field (see “Adding a User” on page 22). Each user’s email contains a new, unique temporary password. The user(s) is required to change their password the next time they log in.
- If an email address has not been specified for a user(s) in the User Contact Email field, a message indicates that the password cannot be reset for that user(s).



Viewing Access Permissions for Role Profiles

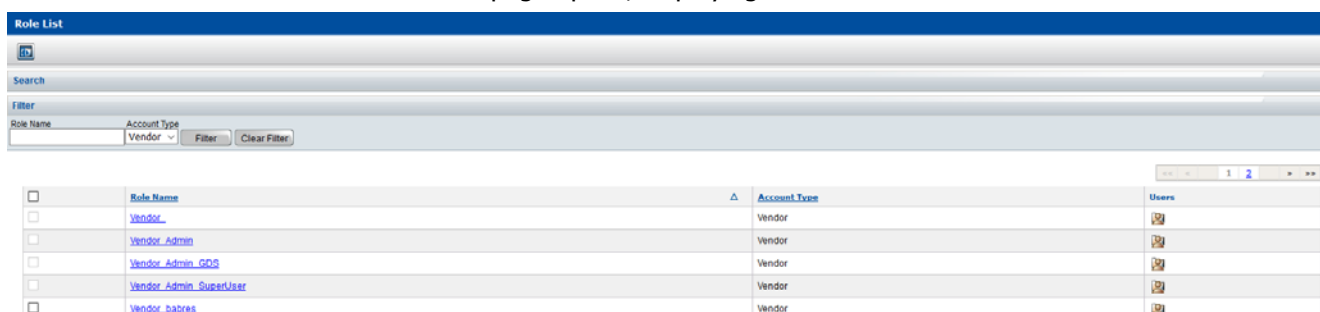
You can view the access permissions for various functional modules in Catalogue for the roles defined for your account.

Note: Super users can only view existing roles. They cannot add, update, or delete any roles.

To view access permissions for role profiles

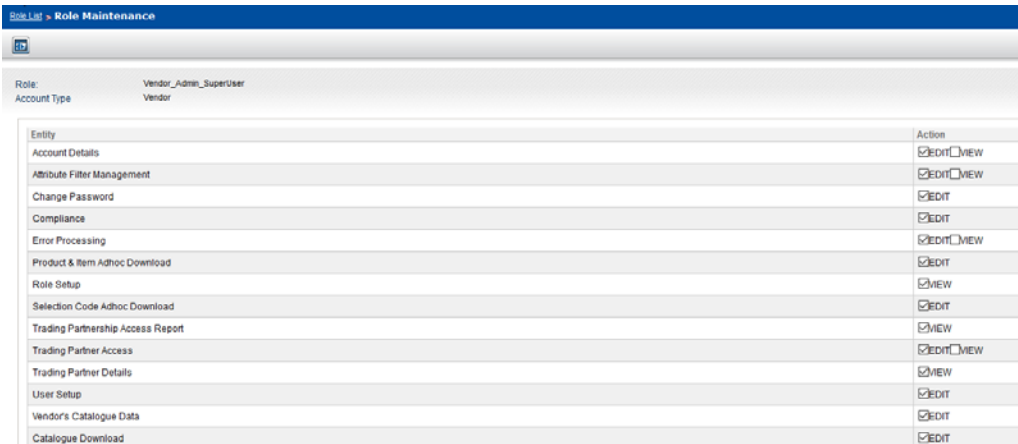
- 1 Click **Account > Role Profiles**.

The Role List page opens, displaying a list of all roles defined for the account.



- 2 In the Role Name column, click the name of a role whose access permissions you want to view.

The Role Maintenance page opens.



For various entities (functional modules) in Catalogue, you can view the access permissions for this role. A checked box indicates that the permission is enabled.

3 To close the page, click **Cancel**.

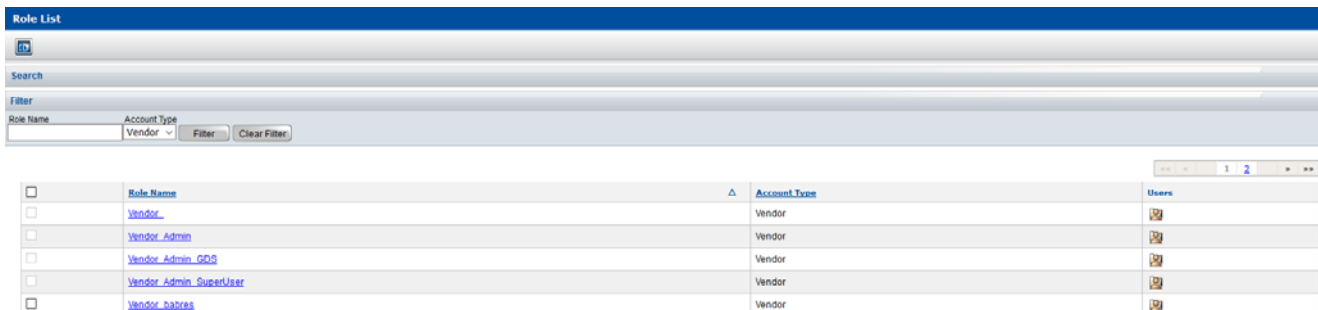
Viewing Users Assigned to a Role

You can view the users assigned to a role.

To view the users assigned to a role

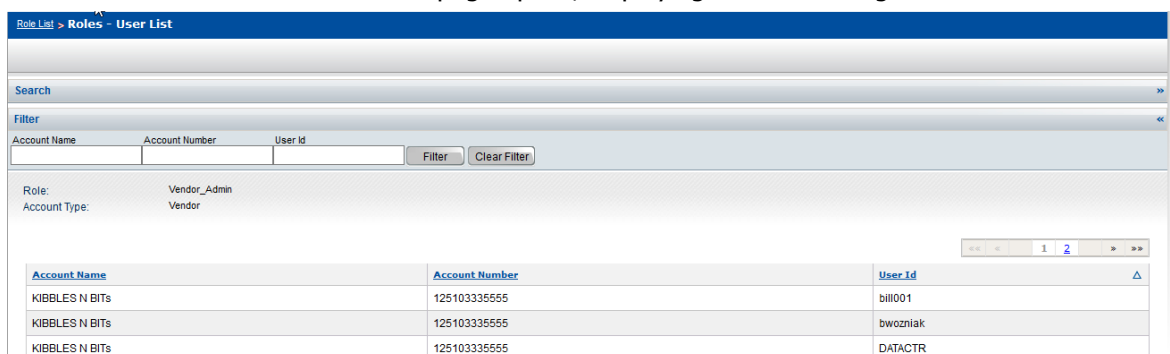
1 Click **Account > Role Profiles**.

The Role List page opens, displaying a list of all roles defined for the account.



2 In the Users column, click the icon for the role whose users you want to view.

The Roles - User List page opens, displaying the users assigned to this role.



Changing a User's Role

You can change the role assigned to a user.

To change a user's role

- 1 Click **Account > User Profiles**.

The User Profiles - User List page, displaying a list of all users for the account.

<input type="checkbox"/>	User ID	User Name	Network ID	Default Attribute Filter	User Type	Role Name	Status
<input type="checkbox"/>	BATCH	Vendor Batch password	BATCH	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	batchs	batchs	batchs	GMA	Batch	Vendor_Batch	Active
<input type="checkbox"/>	bill001	bill	bill	GMA Filter Extended	Interactive	Vendor_Admin	Active

- 2 Filter the list by the User ID or User Name of the user whose role you want to change.

- a In the Filter bar, in the **User ID** box, type the user ID, or in the **User Name** box, type the user name.

- b Click **Filter**.

The page refreshes to display the results.

- 3 In the User ID column, click the hyperlink of the user whose role you want to change.

The User Profile Setup and Maintenance page for the user opens.

User Information

User ID: bill001
 Network ID:
 User Name:
 User Type: Batch Interactive
 User Contact Email:
 User Role:
 Default Attribute Filter:
 User Status: Active Inactive

Password Change

Password Expiration Date: Dec 29, 2025
 Password Expired:
 New Password:
 Confirm New Password:

Passwords must be between 8 and 16 characters long, consist of numeric and alpha characters only, and contain a minimum of 2 numeric characters and a minimum of 2 alpha characters.

4 Complete the User Role field as described in the following table.

Field	Description
User Role	<p>Required. From the drop-down list, select a role which determines the user's edit and view permissions for various functional modules in their catalogue. Some of the most common roles are:</p> <ul style="list-style-type: none"> ■ Vendor_Admin - This role allows the user to download, upload, view, edit, and delete data from the catalogue. ■ Vendor_bView - This role gives a user read-only access to the catalogue. <p>To view the existing roles in your Catalogue account, see "Viewing Access Permissions for Role Profiles" on page 34</p>

5 Click **Save**. A message indicates if the information has been saved successfully.

This section explains how access rights are set up and maintained for accounts and users in OpenText Active Catalogue. Access rights impact availability and functionality of pages and buttons in the application.

This section is organized as follows:

- [“Overview”](#)
- [“Finding Trading Partner Access to Your Catalogue” on page 39](#)
- [“Setting or Changing Trading Partner Access” on page 43](#)
- [“Using Mass Update to Assign the Same Access” on page 45](#)

Overview

Access rights can be set up for:

- Accounts. See [“Account Access”](#)
- Individuals. See [“Individual Access” on page 39](#)

Account Access

Account access rights are determined, set up, and maintained by the vendor. Vendors have access only to their own catalogues. For each of their trading partners (retailers), the vendor determines the data that the trading partner can access in the vendor’s catalogue.

Vendors can set the degree of trading partner access to their data at one or more levels:

- Account (trading partner)
- Selection Code
- Product

The flexibility of this feature allows a vendor to grant unrestricted access to some Selection Codes and or Products and restricted access to other Selection Codes and/or Products for each retailer.

Types of Access

For each retailer, vendors have a choice of access types that they can set at each level:

- Restricted—A retailer has no access to data at that level.
- Unrestricted—A retailer has access to all data at that level.

- Selection Code—A retailer’s access to data is defined for each Selection Code.
- Product—A retailer’s access to data is defined for each Product.

Individual Access

Individual users can have the following access rights:

- Edit—You can view, add, edit, delete, and download information.
- View—You can only view information.

To find your individual user access, contact OpenText Cloud Support Services (CSS). See “[Contacting Technical Support](#)” on page 5.

Finding Trading Partner Access to Your Catalogue

To find a trading partner’s current access rights to your catalogue

- 1 Click **Administration > Trading Partner Access**. The Trading Partner List page opens.

Trading Partner Name	Account Number	Subscription Date	Last Access Date	Access Type
Brian Ret Access2	81234567890	Nov 19, 2010		<input type="radio"/> Restricted <input checked="" type="radio"/> Selection Code <input type="radio"/> Unrestricted Selection Code List

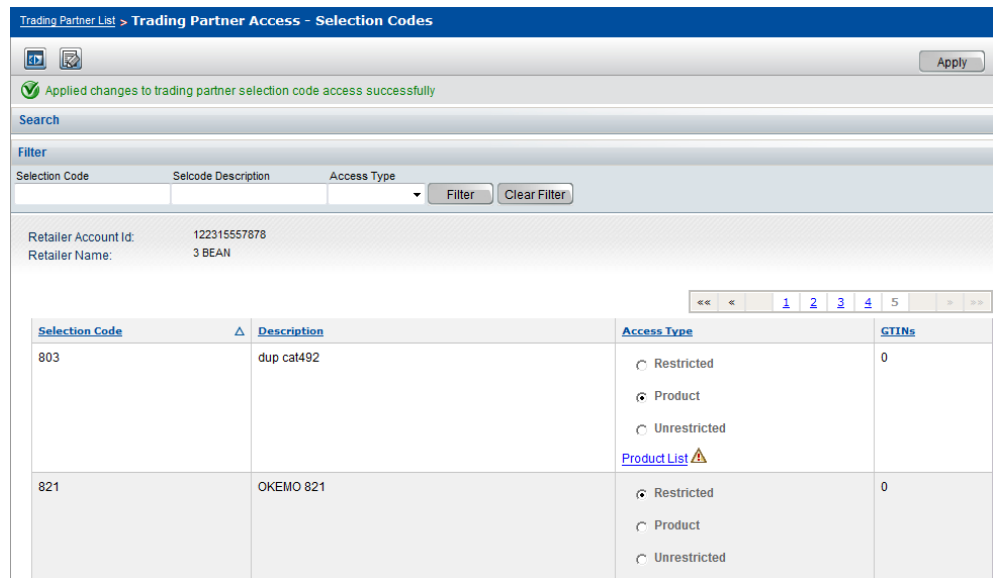
- 2 The table displays from left:
 - **Trading Partner Name**—The trading partner’s name.
 - **Account Number**—The trading partner’s account number.
 - **Subscription Date**—The date the trading partner subscribed to OpenText Active Catalogue.
 - **Last Access Date**—The date the trading partner last accessed your catalogue.
 - **Access Type**—The access type currently selected for the trading partner:
 - **Restricted**—Trading partner has no access to your catalogue.
 - **Selection Code**—Trading partner’s access is restricted to specific Selection Codes.
 - **Unrestricted**—Trading partner has full access to your catalogue.
- 3 Find a trading partner in the list:
 - Click **Filter** to filter the list. See “[Filtering the Trading Partner List](#)” on page 41.

- Scroll through the list.
 - Use the browse bar to move between pages.
- 4 Steps 4-7 are optional for drilling down to the Selection Code and Product levels.

If a trading partner’s access is restricted to specific Selection Codes, you can view the access status for each Selection Code by clicking the **Selection Code List** hyperlink in the Access Type column.

Note: If you have not yet defined trading partner access to the Selection Codes, a warning icon displays to remind you to define the access; by default, Selection Code access is Restricted.

The Trading Partner Access - Selection Codes page opens.



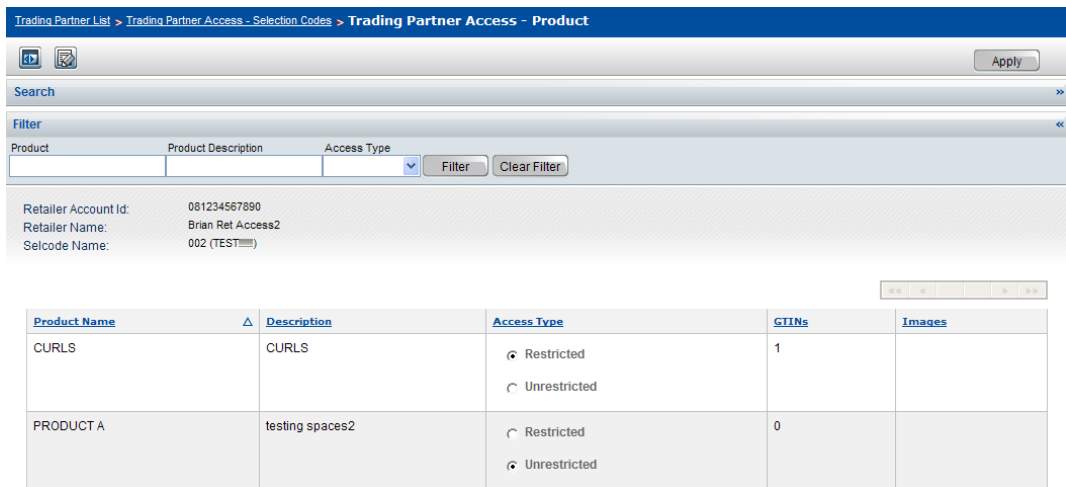
The access type currently selected for the Selection Code is shown in the Access Type column:

- **Restricted**—The trading partner has no access to this Selection Code.
 - **Product**—The trading partner’s access is restricted to specific Products under this Selection Code.
 - **Unrestricted**—The trading partner has full access to this Selection Code.
- 5 Step 5 is optional. To find a Selection Code in the list:
- Click **Filter** to filter the list. See “Filtering the Trading Partner Access - Selection Codes List” on page 42.
 - Scroll through the list.
 - Use the browse bar to move between pages.
- 6 Step 6 is optional for drilling down to the Product level.

If a trading partner has Product access, you can view the access status for each Product by clicking the **Product List** hyperlink in the Access Type column.

Note: If you have not yet defined trading partner access to the Products, a warning icon displays to remind you to define the access; by default, Product access is Restricted.

The Trading Partner Access - Product page opens.



The access type currently selected for the Product is shown in the Access Type column:

- **Restricted**—The trading partner has no access to this Product.
- **Unrestricted**—The trading partner has full access to this Product.

7 Step 7 is optional. To find a Product in the list:

- Click **Filter** to filter the list. See ["Filtering the Trading Partner Access Product List"](#) on page 42.
- Scroll through the list.
- Use the browse bar to move between pages.

Filtering the Trading Partner List

You can use the filter to display a list of trading partners based on the criteria you specify.

To filter the Trading Partner list

- 1 On the Trading Partner List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Trading Partner Name**—Enter a trading partner’s full or partial name.
 - **Account Number**—Enter a trading partner’s full or partial OpenText account number.
 - **Access Type**—To display only trading partners with a specific access, from the drop-down list, select an access type.
 - **Restricted**—Show only trading partners with no access to your catalogue.
 - **Selection Code**—Show only trading partners whose access is restricted to specific Selection Codes.
 - **Unrestricted**—Show only trading partners with full access to your catalogue.

- **Subscription Date on/after**—To display a list of trading partners who subscribed to OpenText Active Catalogue on or after a specific date, enter that date.
- 2 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

Filtering the Trading Partner Access - Selection Codes List

You can use the filter to display a list of Selection Codes based on the criteria you specify.

To filter the Trading Partner Access - Selection Codes list

- 1 On the Trading Partner Access - Selection Codes page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Selection Code**—Enter a Selection Code.
 - **Selcode Description**—Enter a Selection Code description.
 - **Access Type**—To display only Selection Codes with a specific access, from the drop-down list, select an access type.
 - **Restricted**—Show only Selection Codes in your catalogue that the trading partner has no access to.
 - **Product**—Show only Selection Codes for trading partners whose access is restricted to specific Products.
 - **Unrestricted**—Show only Selection Codes in your catalogue that the trading partner has full access to.
- 2 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

Filtering the Trading Partner Access Product List

You can use the filter to display a list of Products based on the criteria you specify.

To filter the Trading Partner Access - Product list

- 1 On the Trading Partner Access - Product page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Product**—Enter a Product.
 - **Product Description**—Enter a Product description.
 - **Access Type**—To display only Products with a specific access, from the drop-down list, select an access type.
 - **Restricted**—Show only Products under this Selection Code that the trading partner has no access to.
 - **Unrestricted**—Show only Products under this Selection Code that the trading partner has full access to.
- 2 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

Setting or Changing Trading Partner Access

You can set up or change a trading partner’s access to your catalogue.

To set up or change trading partner access to your catalogue

- 1 Click **Administration > Trading Partner Access** to find the trading partner’s current access. See “Finding Trading Partner Access to Your Catalogue” on page 39 for more details. The Trading Partner List page opens.

The screenshot shows the 'Trading Partner List' interface. At the top, there is a search bar and a filter section with fields for 'Trading Partner Name', 'Account Number', 'Access Type', and 'Subscription Date on/after'. Below the filter is a table with the following data:

Trading Partner Name	Account Number	Subscription Date	Last Access Date	Access Type
Brian Ret Access2	81234567890	Nov 19, 2010		<input type="radio"/> Restricted <input checked="" type="radio"/> Selection Code <input type="radio"/> Unrestricted Selection Code List ⚠

- 2 Click an option in the Access Type column to select that access for the trading partner:
 - **Restricted**—Trading partner has no access to your catalogue.
 - **Selection Code**—Trading partner’s access is restricted to specific Selection Codes.
 - **Unrestricted**—Trading partner has full access to your catalogue.

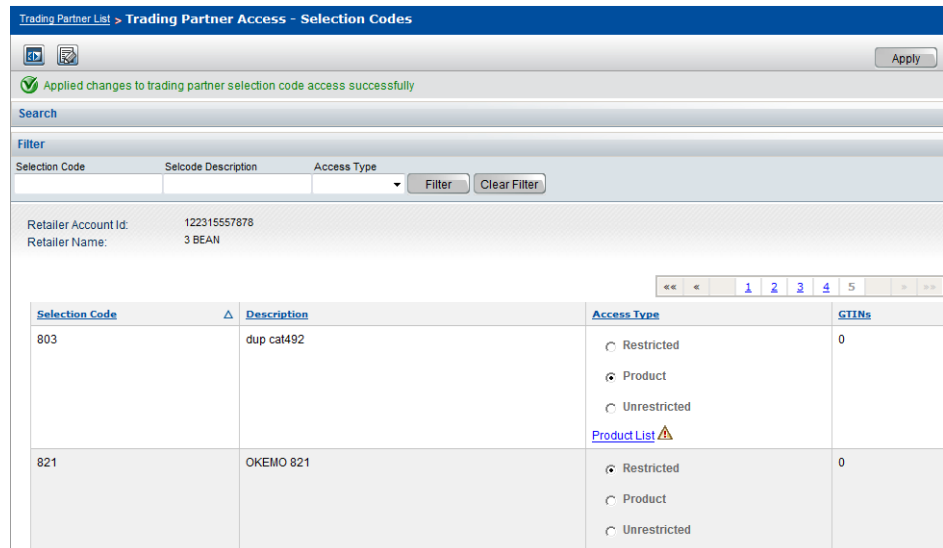
Note: The default trading partner access is either Restricted, Selection Code, or Unrestricted. See “Maintaining Your Account” on page 49 for more details.

- 3 Click **Apply**.

If you selected Selection Code access, a warning icon reminds you to define trading partner access to Selection Codes; by default, all Selection Codes are Restricted.

- 4 Steps 4-12 are optional for drilling down to the Selection Code and Product levels.

For Selection Code access, click the **Selection Code List** hyperlink that appears in the Access Type column. The Trading Partner Access - Selection Codes page opens.



The table displays from left:

- **Selection Code Name**—Selection Codes in the vendor catalogue
- **Description**—Selection Code Description for each Selection Code
- **Access Type**—Trading partner’s current access for each Selection Code
- **GTINs**—Number of GTINs under the Selection Code
- **Images**—Number of images for Products and GTINs under the Selection Code

5 To find a Selection Code in the list:

- Click **Filter** to filter the list. See [“Filtering the Trading Partner Access - Selection Codes List”](#) on page 42.
- Scroll through the list.
- Use the browse bar to move between pages.

6 Click an option in the Access Type column to select that access for the trading partner:

- **Restricted**—Trading partner has no access to this Selection Code.
- **Product**—Trading partner’s access is restricted to specific Products under this Selection Code.
- **Unrestricted**—Trading partner has full access to data for this Selection Code.

7 Click **Apply**.

If you selected Product access, a warning icon reminds you to define access to Products; by default, all Products are Restricted.

8 Steps 8-12 are optional for drilling down to the Product level.

For Product access, click the **Product List** hyperlink that appears in the Access Type column. The Trading Partner Access - Product page opens.

Product Name	Description	Access Type	GTINs	Images
CURLS	CURLS	<input checked="" type="radio"/> Restricted <input type="radio"/> Unrestricted	1	
PRODUCT A	testing spaces2	<input type="radio"/> Restricted <input checked="" type="radio"/> Unrestricted	0	

- 9 The table displays from left:
 - **Product Name**—Products in the vendor catalogue
 - **Description**—Product Description for each Product
 - **Access Type**—Trading partner’s current access for each Product
 - **GTINs**—Number of GTINs under the Product
 - **Images**—Number of images for GTINs under the Product
- 10 To find a Product in the list:
 - Click **Filter** to filter the list. See “[Filtering the Trading Partner Access Product List](#)” on page 42.
 - Scroll through the list.
 - Use the browse bar to move between pages.
- 11 Click an option in the Access Type column to select that access for the Product:
 - **Restricted**—Trading partner has no access to this Product.
 - **Unrestricted**—Trading partner has full access to this Product.
- 12 Click **Apply** to save changes.

Using Mass Update to Assign the Same Access

To save time, you can assign the same access at the following levels:

- Account (trading partner)—Assign the same access to all trading partners. See “[To assign the same access to all trading partners using mass update](#)” on page 46.
- Selection Code—Assign the same access to all Selection Codes for a specific trading partner. See “[To assign the same access to all Selection Codes using mass update](#)” on page 46.

- Product—Assign the same access to all Products for a specific Selection Code. See [“To assign the same access to all Products using mass update” on page 47.](#)

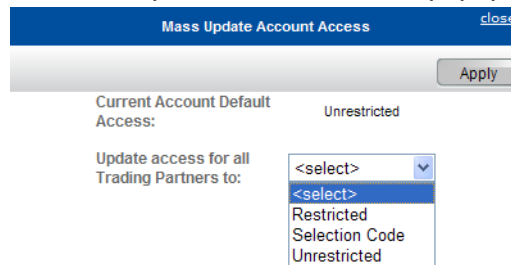
To assign the same access to all trading partners using mass update

1 Click **Administration > Trading Partners Access.**

The Trading Partner List page opens.

2 Click **Mass Update.**

The Mass Update Account Access popup opens.



3 From the drop-down list, select an access to apply to all trading partners:

- **Restricted**—No trading partners have access to your catalogue.
- **Selection Code**—All trading partners have specific Selection Code access to your catalogue which you must define.
- **Unrestricted**—All trading partners have full access to your catalogue.

Note: If you select Selection Code, don't forget to define Selection Code access for each trading partner; by default, all Selection Codes are Restricted.

4 Click **Apply** to make the change.

Note: If you decide you do not want to apply the change, click **close** to close the popup, and no changes will be made.

To assign the same access to all Selection Codes using mass update

1 Click **Administration > Trading Partners Access.**

The Trading Partner List page opens.

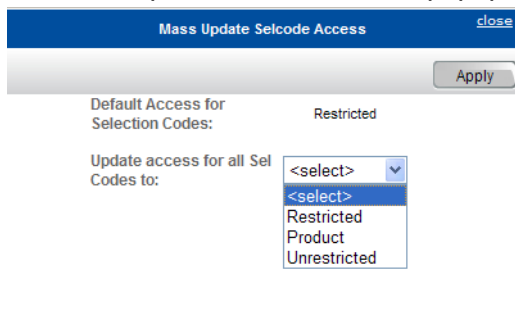
2 Filter the list to display the trading partner whose Selection Code access you want to assign. See [“Filtering the Trading Partner List” on page 41.](#)

3 Click the **Selection Code List** hyperlink that appears in the Access Type column.

The Trading Partner Access - Selection Codes page opens.

4 Click **Mass Update.**

The Mass Update SelCode Access popup opens.



- 5 From the drop-down list, select the access to apply to all Selection Codes for this trading partner:
 - **Restricted**—This trading partner does not have access to any Selection Codes in your catalogue.
 - **Product**—This trading partner has specific Product access for each Selection Code in your catalogue.
 - **Unrestricted**—This trading partner has full access to all Selection Codes in your catalogue.

Note: If you select Product, don't forget to define Product access for each Selection Code; by default, all Products are Restricted.
- 6 Click **Apply** to make the change.

Note: If you decide you do not want to apply the change, click **close** to close the popup, and no changes will be made.

To assign the same access to all Products using mass update

- 1 Click **Administration > Trading Partners Access**.
The Trading Partner List page opens.
- 2 Filter the list to display the trading partner whose Selection Code access you want to assign. See ["Filtering the Trading Partner List" on page 41](#).
- 3 Click the **Selection Code List** hyperlink that appears in the Access Type column.
The Trading Partner Access - Selection Codes page opens.
- 4 Filter the list to display the Selection Code whose Product access you want to assign. See ["Filtering the Trading Partner Access - Selection Codes List" on page 42](#).
The Trading Partner Access - Products page opens.
- 5 Click the **Product List** hyperlink that appears in the Access Type column.
The Trading Partner Access - Product page opens.
- 6 Click **Mass Update**.

The Mass Update Product Access popup opens.

Mass Update Product Access [close](#)

Apply

Default Access for Products: Restricted

Update access for all Products to:

- <select>
- <select>
- Restricted
- Unrestricted

- 7 From the drop-down list, select the access to apply to all Products for this Selection Code:
 - **Restricted**—This trading partner does not have access to any Products for this Selection Code.
 - **Unrestricted**—This trading partner has full access to all Products for this Selection Code.
 - 8 Click **Apply** to make the change.
- Note:** If you decide you do not want to apply the change, click **close** to close the popup, and no changes will be made.

This section explains how to maintain your own account information and view the account information of your trading partners.

Account information includes:

- Account details (for you and your trading partners) such as address and contact data
- Your GS1 (UCC/EAN) Company Prefix List
- Custom field information

This section is organized as follows:

- ["Maintaining Your Account" on page 49.](#)
- ["Viewing Your GS1 \(UCC/EAN\) Company Prefixes" on page 52.](#)
- ["Viewing a Retailer's Account and Detail Information" on page 53.](#)
- ["Filtering the Trading Partner List" on page 53.](#)
- ["Filtering the GS1 \(UCC/EAN\) Company Prefix List" on page 54.](#)
- ["Custom Fields" on page 54.](#)
- ["Using an EDI 888 Document to Populate Custom Field Values" on page 55](#)
- ["Custom Field Definition Examples" on page 56.](#)
- ["Adding a Custom Field Definition" on page 60.](#)
- ["Editing a Custom Field Definition" on page 62.](#)
- ["Viewing a Custom Field Definition" on page 64.](#)
- ["Deleting a Custom Field Definition" on page 66.](#)

Maintaining Your Account

Use the Account Setup and Maintenance page, Account Details tab to:

- View your account and catalogue information (for example, quantity of Products and GTINs).
- Maintain your account address and contact information (available to trading partners).
- Select a default attribute filter.
- Select a preferred currency.
- Select a preferred date format.

- Select a default email address.
- Provide your company's GLN (Global Location Number).

Note: If you change any information at the account level, and you have other information at this level that contains an asterisk, you must update that information by removing the asterisk before the system will allow you to save your changes. The following characters should not appear in any data loaded to OpenText Active Catalogue > ^ ` [] * ~

To view or maintain account details

1 Click Account > Account Details.

The Account Setup and Maintenance page opens, displaying the Account Details tab.

Account Setup and Maintenance

Search

Account Details | GS1 (UCC/EAN) Company Prefixes | Custom Field Definitions

Account Name: KIBBLES N BITS | Account Number: 125103335555 | Account Type: Manufacturer
 Account Short Name: KIBBLES | Subscription Date: 03/03/07 | Status: Active
 Created On: 2001-12-11 by QRSADMIN | Changed On: 2013-03-12 by QRSADMIN

Catalogue Information

Selection Codes: 123 | GTINs: 774
 Products: 1001 | Catalogue Last Update: 03/12/13

Account Preference

Date Format: MM/DD/YY | Currency: US Dollar
 Default Attribute Filter: GMA
 Default Trading Partner Access: Restricted Selection Code Unrestricted

MSRP Disclaimer:

Company Information

Address Line 1: 1400 Marina Way | Address Line 2: Suite 100
 City: ALPHARETTA | State/Province: GEORGIA
 Zip/Postal Code: 30004 | Country: UNITED STATES
 Telephone Number: 1234567890 | Facsimile Number: 123456789
 E-Mail Address: | Internet URL: www.email.com
 GLN: 0000052310058

Contact

Contacts	Name	Telephone Number	Facsimile Number	E-Mail Address
Primary	Joe Smith	5106215089	5106215089	
Secondary	Sandra Jones	1234567893	0987654323	
Backup				

2 In the Account Preferences panel, select preferences from the following drop-down lists:

- **Date Format**—Format to view and enter dates in the browser interface.
- **Currency**—Preferred monetary currency. All vendors and retailers can change their currency.

- **Default Attribute Filter**—Applies to all new users for the account but will not change default filters assigned to existing users. See ["About Default Attribute Filters"](#) on page 69.
- 3 In the Account Preferences panel select a **Default Trading Partner Access** to allow retailers to automatically have one of the following types of access to your catalogue:
 - **Restricted**—Retailers have no access to your catalogue. The default setting is Restricted.
 - **Selection Code**—Retailers have access to only to specific Selection Codes in your catalogue.
 - **Unrestricted**—Retailers have full access to your catalogue.

To set exceptions to the default access for individual retailers, see ["Setting or Changing Trading Partner Access"](#) on page 43.

Note: If any exceptions to the default access have been granted to individual retailers, the **Default Trading Partner Access** options become read-only. This protects against the loss of all lower level access settings, since changing the default would discard the lower level settings.

The mass update option on the Trading Partner Access screen (Administration > Trading Partner Access) allows mass access updates, and if there are no exceptions set, the **Default Trading Partner Access** options are re-enabled.
- 4 In the Account Preferences panel, in the **MSRP Disclaimer** box, enter text for an MSRP disclaimer if you want to display a disclaimer with the Suggested Retail Price attribute (displays on the GTIN detail page).
- 5 In the Company Information panel, complete the following:
 - **Your company's information** - Type in your company's information. You can enter only one email address in the E-mail Address field (maximum of 1024 characters).

Note: The following characters should not appear in any data loaded to OpenText Active Catalogue > ^ ` [] * ~ For telephone and fax numbers, do not use dashes, decimals, or parentheses.
 - **The GLN (Global Location Number)** - (Optional) Type in your company's GLN.
- 6 In the Contact panel, type in your company's contact information. You can enter multiple email addresses as long as each address is separated by a semicolon (maximum of 1024 characters for the entire field).

Note that the Primary contact email address you enter is the address to which Catalogue:

 - Sends a separate email for each EDI document that contains errors (refer to "Step 7 in the section ["How Catalogue Processes Batch Files"](#) on page 235).
 - Notifies you by email when data is non-compliant (refer to ["Email Notifications for Compliance Checks"](#) on page 122)

- Sends a Load Status Report (LSR) if you have the LSR and the LSR email option enabled for your account (refer to “Load Status Report” on page 184).

Note: The following characters should not appear in any data loaded to OpenText Active Catalogue > ^ ` [] * ~ For telephone and fax numbers, do not use dashes, decimals, or parentheses.

7 Click **Save**. A message indicates if the information has been saved successfully.

Viewing Your GS1 (UCC/EAN) Company Prefixes

GS1 (UCC/EAN) company prefixes are also called Manufacturer Block IDs. Vendors can view a list of their prefixes. Only OpenText Administrators can add, change, or delete prefixes in OpenText Active Catalogue.

Note: Check your GS1 company prefixes to be sure that they are valid. OpenText does not recommend using invalid GS1 company prefixes, as it may result in chargebacks from some of your retailers.

To view your GS1 (UCC/EAN) prefixes

1 Click **Account > Account Details**.

The Account Setup and Maintenance page opens, displaying the Account Details tab.

2 Click the **GS1 (UCC/EAN) Company Prefixes** tab.

The GS1 (UCC/EAN) Company Prefixes page displays prefixes for your account and indicates whether or not they are active prefixes. An “inactive” prefix means the prefix is no longer used.

Account Setup and Maintenance

Search

Filter

GS1 (UCC/EAN) Company Prefix Active

Filter Clear Filter

Account Details GS1 (UCC/EAN) Company Prefixes

Account Name: KIBBLES N BITS Account Number: 125103335555 Account Type: Manufacturer

GS1 (UCC/EAN) Company Prefix	Active
000049	Yes No
000491	Yes No

You should be aware of the following:

- If the Prefix Validation compliance check is turned on, and a GTIN uses a GS1 company prefix that is not associated with your account, you cannot add or modify the GTIN.

- If the Prefix Validation compliance check is turned off, a GTIN using a GS1 company prefix that is not associated with your account can be added or modified (resulting in non-compliant data).

See [Chapter 8, "Working with Compliance Checks,"](#) on page 120 for detailed information.

Viewing a Retailer's Account and Detail Information

To find a retailer's account and detail information

- 1 Click **Administration > Trading Partner Access**.

The Trading Partner List page opens. The table displays from left:

- **Trading Partner Name**—The retailer's name
 - **Account Number**—The retailer's account number
 - **Subscription Date**—The date the retailer subscribed to OpenText Active Catalogue
 - **Last Access Date**—The date the retailer last accessed your catalogue
 - **Access Type**—The access type currently selected for the retailer
 - **Restricted**—Retailers with no access to your catalogue
 - **Unrestricted**—Retailers with full access to your catalogue
 - **Selection Code**—Retailers with access restricted to specific Selection Codes
- 2 To locate a retailer in the list, do any of the following:
 - Filter the list. See ["Filtering the Trading Partner List"](#) on page 53.
 - Scroll through the list.
 - Use the browse bar to move between pages.
 - 3 To view details such as a retailer's address and contact information, click the retailer's account name hyperlink in the Trading Partner Name column.

Filtering the Trading Partner List

You can use the filter to display a list of retailers based on the criteria you specify.

To filter the Trading Partner list

- 1 On the Trading Partner List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Trading Partner Name**—Enter a retailer's full or partial name.
 - **Account Number**—Enter a retailer's full or partial OpenText Active Catalogue account number.

- **Subscription Date on/after**—To display a list of retailers who opened OpenText Active Catalogue accounts on or after a specific date, enter that date.
 - **Access Type**—To display only retailers with a specific access, select an access type from the drop-down list:
 - **Restricted**—Show only retailers who have no access to your catalogue.
 - **Unrestricted**—Show only retailers who have full access to your catalogue.
 - **Selection Code**—Show only retailers whose access is restricted to specific Selection Codes.
- 2 Click **Filter**.
- The list that meets your criteria displays.
- Note:** To remove all filter criteria, click **Clear Filter**.

Filtering the GS1 (UCC/EAN) Company Prefix List

Filter a GS1 (UCC/EAN) Company Prefix list to display only certain prefixes.

To filter a GS1 (UCC/EAN) Company Prefix list

- 1 Navigate to the Account Setup and Maintenance page, and click the GS1 (UCC/EAN) Company Prefixes tab.
See [“Viewing Your GS1 \(UCC/EAN\) Company Prefixes” on page 52](#).
 - 2 From the **Active** drop-down list, select one of the following:
 - **Yes**—Show only active prefixes
 - **No**—Show only inactive prefixes (no longer used by the vendor)
 - 3 Click **Filter**. The list that meets your criteria displays.
- Note:** To remove all filter criteria, click **Clear Filter**.

Custom Fields

Catalogue supports account-specific custom fields (attributes) at the Product level, thereby allowing Intelligent Web Forms (IWF) integration with Catalogue.

The vendor must first add the custom fields (called custom field definitions) using the browser user interface (UI). Once the fields are added, they can be populated by either the vendor (using the UI, an EDI 888 document, or web services) or the retailer (using the UI or web services).

For more information about Catalogue’s web service capability, see the *OpenText Active Catalogue Web Services Guide*.

Use the following topics to understand and work with custom field definitions and values:

- [“Using an EDI 888 Document to Populate Custom Field Values” on page 55](#)
- [“Custom Field Definition Examples” on page 56](#)

- “Adding a Custom Field Definition” on page 60
- “Editing a Custom Field Definition” on page 62
- “Viewing a Custom Field Definition” on page 64
- “Deleting a Custom Field Definition” on page 66
- “Adding and Editing Custom Field Values for a Product” on page 131

Using an EDI 888 Document to Populate Custom Field Values

If you are going to use an EDI 888 document to populate the values of your custom fields, you must indicate the specific EDI location that will provide those values; you specify this EDI location at the time you create the custom field definition.

If you want the EDI location to accommodate different values depending on a qualifier, you can specify an EDI qualifier location/value pair. You complete these fields when you create (add) a custom field definition. The fields are defined as follows:

- **EDI Location** - The **EDI Location** field (segment and position) holds the custom field value associated with the Product for a specific vendor/retailer relationship. For example, N102 (N1 is the segment and 02 is the position) holds the custom field value.
- **EDI Qualifier Location/Value pair** - If you want the **EDI Location** field to accommodate multiple values depending on a qualifier, you can specify an EDI qualifier location/value pair. The **EDI Qual. Loc.** field holds the EDI location of the EDI qualifier value (**EDI Qual. Value** field) which determines the custom field value to associate with the Product for a specific vendor/retailer relationship.

For example, you create two custom field definitions (CustomFieldOne and CustomFieldTwo), both with an **EDI Location** of **N102** and an **EDI Qual. Loc.** of **N101**.

CustomFieldOne has an **EDI Qual. Value** of **CD** and CustomFieldTwo has an **EDI Qual. Value** of **EF**.

The image shows two screenshots of the 'Custom Field Definitions' dialog box. The top screenshot is for 'CustomFieldOne' and the bottom is for 'CustomFieldTwo'. Both have 'EDI Qual. Loc.' set to 'N101' and 'EDI Location' set to 'N102'. The 'EDI Location from Header segment?' checkbox is unchecked in both. The 'Type' is set to 'Text'. The 'Length' is 50 for CustomFieldOne and 60 for CustomFieldTwo. The 'EDI Qual. Value' is 'CD' for CustomFieldOne and 'EF' for CustomFieldTwo. There are 'Save' and 'Close' buttons in the top right of each dialog.

If N101=**CD**, then N102 is the custom field value for CustomFieldOne.

If N101=**EF**, then N102 is the custom field value for CustomFieldTwo.

For additional examples, see ["Custom Field Definition Examples" on page 56](#).

EDI Location from Header Segment

When you create custom field definitions, there might be a situation where there are two custom field definitions that both have the same **EDI Location** (for example, N104), but one custom field definition refers to the Header level and one refers to the Detail level.

In these cases, you can select the **EDI Location from Header Segment** check box to indicate that the **EDI Location** for one of the definitions is determined by the segment at the Header level (implying that one retailer-specific custom value applies to all of the products named in a particular loop).

For the other definition, you do not select the check box. This indicates that the **EDI Location** is determined by the segment at the Detail level (another N104 in the loop at the detail level has a value that is specific to each product for each retailer).

Custom Field Definition Examples

This section provides several examples of custom field definitions:

- ["Using EDI Location to Determine the Custom Field Value" on page 57](#)
- ["Using EDI Qualifier Location/Value Pair to Determine the Custom Field Value" on page 57](#)

- “Using EDI Qualifier Location/Value Pairs to Determine Multiple Custom Field Values” on page 59

Using EDI Location to Determine the Custom Field Value

This example shows how to use EDI Location to provide the custom field value. You define a custom field with the specifications shown and name it **Retailer Info**.

Custom Field Definitions	
Name	Retailer Info
Label	G39
EDI Qual. Loc.	
EDI Qual. Value	
EDI Location	G3903
EDI Location from Header segment?	<input type="checkbox"/>
Type	Text
Length	50
Precision	
Supports multiline values	<input type="checkbox"/>

Here is an example of a line from an EDI 888 document showing the G39 segment:

```
G39***STNP22Y*****VN*220172TSITC
```

Catalogue looks in the G3903 element (position 03 of the G39 segment) for the value to store in this custom field.

In this example, Catalogue finds the value STNP22Y in the G3903 element. Catalogue stores STNP22Y in this custom field (Retailer Info) for the retailer that is specified in the N1 header segment (GROCRET, account number 125106201800), as shown below.

```
ISA*00*          *01*R7155D  *01*0036051840  *12*5109654406
*101228*2304*^*00403*460000099*0*T*>
GS*QG*0036051840*5109654406*20101228*2304*6*X*004030
ST*888*1001
N1*ST*GROCRET*91*125106201800
```

Using EDI Qualifier Location/Value Pair to Determine the Custom Field Value

This example shows how to use EDI Location to provide the custom field value based on the values in the EDI Qual. Loc. and EDI Qual. Value fields.

Define a custom field with the specifications shown, and name it **DE7973**.

Custom Field Definitions	
Name	DE7973
Label	CB
EDI Qual. Loc.	G3902
EDI Qual. Value	CB
EDI Location	G3903
EDI Location from Header segment?	<input type="checkbox"/>
Type	Text
Length	10
Precision	
Supports multiline values	<input type="checkbox"/>

The EDI Qual. Loc. is the location of the qualifier. For this custom field, it is G3902. The EDI Qual. Value is the value of the qualifier. For this custom field, it is CB. Here is an example of a line from an EDI 888 document showing the G39 segment:

```
G39**CB*STNP22Y*****VN*220172TSITC
```

Catalogue looks in the G3902 element (position 02 of the G39 segment). If the value is CB, Catalogue looks in the G3903 element (position 03 of the G39 segment) for the value to store in this custom field.

In this example, Catalogue finds the value STNP22Y in the G3903 element. Catalogue stores STNP22Y in this custom field (DE7973) for the retailer that is specified in the N1 header segment (GROCRET, account number 125106201800), as shown below.

```
ISA*00*          *01*R7155D  *01*0036051840  *12*5109654406
*101228*2304*^*00403*460000099*0*T*>
GS*QG*0036051840*5109654406*20101228*2304*6*X*004030
ST*888*1001
N1*ST*GROCRET*91*125106201800
```

Note: The N1 segment at the header level, immediately following the ST segment, is the segment that is used to determine the retailer to whom the custom field applies (N1*ST*GROCRET*91*125106201800).

If there is another retailer account specified in the 03/04 positions in the N1 segment within the G39 loop, it is ignored (N1*ST*RETAILER*91*125106201811). Refer to the sample code below.

```
ISA*00*          *01*R7155D  *01*0036051840  *12*5109654406
*101228*2304**^00403*460000099*0*T*>
GS*QG*0036051840*5109654406*20101228*2304*6*X*004030
ST*888*1001
N1*ST*GROCRET*91*125106201800
G62*09*20101228*W*230426
G53*003
LX*1
G39**CB*STNP11*****VN*220007SI TC
N9*PA*P11STN
N9*CN*P21STN
N9*60*P22STN
N1*ST*RETAILER*91*125106201811
SE*11*1001
GE*1*6
IEA*1*460000099
```

Catalogue uses the account information in this segment.

Catalogue ignores the account information in this segment.

Using EDI Qualifier Location/Value Pairs to Determine Multiple Custom Field Values

This example shows how you can obtain more than one custom field value from the same EDI Location, depending on the values in the EDI Qual. Loc. and EDI Qual. Value fields.

Define a custom field with the specifications shown, and name it **Retailer-Specific-PID**.

The screenshot shows the 'Custom Field Definitions' dialog box with the following fields:

- Name: Retailer-Specific-PID
- Label: G3902-CB-G3903
- EDI Qual. Loc.: G3902
- EDI Qual. Value: CB
- EDI Location: G3903
- EDI Location from Header segment?:
- Type: Text
- Length: 50
- Precision: (empty)
- Supports multiline values:

The EDI Qual. Loc. is the location of the qualifier. For this custom field, it is G3902. The EDI Qual. Value is the value of the qualifier. For this custom field, it is CB.

Define another custom field with the specifications shown, and name it **Ship-To-Number**.

The screenshot shows the 'Custom Field Definitions' dialog box with the following fields:

- Name: Ship-To-Number
- Label: G3902-ST-G3903
- EDI Qual. Loc.: G3902
- EDI Qual. Value: ST
- EDI Location: G3903
- EDI Location from Header segment?:
- Type: Number
- Length: 50
- Precision: 2
- Supports multiline values:

The EDI Qual. Loc. is the location of the qualifier. For this custom field, it is G3902. The EDI Qual. Value is the value of the qualifier. For this custom field, it is ST.

Here is an example of a line from an EDI 888 document showing the G39 segment:

```
G39**CB*STNP22Y*****VN*220172TSITC
```

Catalogue looks in the G3902 element (position 02 of the G39 segment).

If the value is CB, Catalogue looks in the G3903 element (position 03 of the G39 segment) for the value to store in this custom field. In this case, the value corresponds to STNP22Y.

In this example, Catalogue finds the value STNP22Y in the G3903 element. Catalogue stores STNP22Y in this custom field (Retailer-Specific-PID) for the retailer that is specified in the N1 header segment (GROCRET1, account number 125106201800), as shown below.

```
ISA*00*          *01*R7155D  *01*0036051840 *12*5109654406
*101228*2304*^*00403*460000099*0*T*>
GS*QG*0036051840*5109654406*20101228*2304*6*X*004030
ST*888*1001
N1*ST*GROCRET1*91*125106201800
```

Here is an example of a line from a different EDI 888 document showing the G39 segment:

```
G39**ST*STNP35W*****VN*220172TSITC
```

Catalogue looks in the G3902 element (position 02 of the G39 segment).

If the value is ST, Catalogue looks in the G3903 element (position 03 of the G39 segment) for the value to store in this custom field. In this case, the value corresponds to STNP35W.

In this example, Catalogue finds the value STNP35W in the G3903 element. Catalogue stores STNP35W in this custom field (Ship-To-Number) for the retailer that is specified in the N1 header segment (GROCRET2, account number 135107204808), as shown below.

```
ISA*00*          *01*R7155D  *01*0036051841 *12*5109654407
*101228*2304*^*00403*460000099*0*T*>
GS*QG*0036051840*5109654407*20101228*2304*6*X*004030
ST*888*1001
N1*ST*GROCRET2*91*135107204808
```

Adding a Custom Field Definition

To add a custom field definition

- 1 Click **Account > Account Details**. The Account Setup and Maintenance page opens, displaying the Account Details tab.
- 2 Click the **Custom Field Definitions** tab.

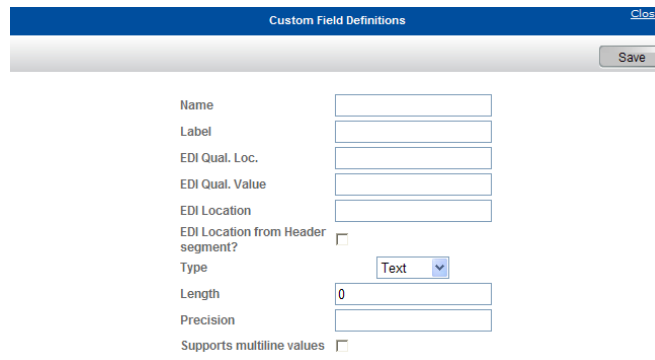
Custom field information displays for existing custom fields.

The screenshot shows the 'Account Setup and Maintenance' interface. At the top, there are navigation icons and a search bar. Below the search bar, there are tabs for 'Account Details', 'GS1 (UCC/EAN) Company Prefixes', and 'Custom Field Definitions'. The 'Custom Field Definitions' tab is active, displaying a table with the following columns: Name, Label, EDI Qual. Loc., EDI Qual. Value, EDI Location, EDI Header Flag, Type, Length, Precision, and Multiline. The table contains three entries:

Name	Label	EDI Qual. Loc.	EDI Qual. Value	EDI Location	EDI Header Flag	Type	Length	Precision	Multiline
Retailer-Specific-PID	G3902-CB-G3903	G3902	CB	G3903	N	Text	50		Y
Ship-To-Name	N101-ST-N102	N101	ST	N102	N	Text	50		N
Ship-To-Number	G3902-ST-G3903	G3902	ST	G3903	N	Number	50	2	N

3 Click **Add**.

The Custom Field Definitions pop-up opens.



4 Complete the following fields:

- **Name**—Required. Type the name of the custom field.
- **Label**—Optional, but if you leave it blank, the system creates a label that is identical to the name. Type a description for the custom field that identifies the field and has meaning to you. The description does not need to be unique.
- **EDI Qual. Loc.**—Optional, but must be present if **EDI Qual. Value** is present.
Type the EDI location for the qualifier. The location consists of the EDI segment and position. For example, type **N101**. N1 refers to the segment and 01 refers to the field position.
- **EDI Qual. Value**—Optional, but must be present if **EDI Qual. Loc.** is present.
Type a value for the EDI qualifier. For example, type **ST**.
- **EDI Location**—Required if an EDI 888 document is used to populate custom field values (optional, if the UI is used to populate values).
Type the EDI location (segment and position) that holds the value associated with this Product for a specific vendor/retailer relationship. For example, type **N102**.
- **EDI Location from Header segment?**—Optional. Select the check box to indicate that you want **EDI Location** (segment and position) to be determined by the Header level (not the Detail level).
Note: Use this check box for situations where there are two custom field definitions that both have the same EDI Location (for example, N104), but one custom field definition refers to the Header level and one refers to the Detail level. The custom definition that refers to the Header level has this check box selected.
- **Type**—Required. From the drop-down list, select the data type for the value associated with this Product for a specific vendor/retailer relationship. The value resides in the location specified by **EDI Location** (for example, N102):
 - **Text**—Indicates that the value is alphanumeric

- **Number**—Indicates that the value is numeric
- **Length**—Required. Type the maximum length for the value.
- **Precision**—If you selected Number in the **Type** field, enter the maximum number of digits that are allowed to the right of the decimal point for the value. If the number is not a decimal, leave this field blank.
- **Supports multiline values**—Optional. Select the check box to create a custom field definition that allows you to define multiple lines of custom field values for a single custom field.

Note: If you select the check box, and then clear it, a dialog box asks you to verify that you want to make the change. If you click OK and save your changes, you are effectively changing the custom field from supporting multiline values to only supporting a single value. This results in the deletion of all custom field values except the first one for each account, for all accounts in which the custom field definition is being used.

See “Using an EDI 888 Document to Populate Custom Field Values” on page 55 for a more detailed explanation of how some of these fields are used.

5 Click **Save**.

The new custom field is added and displays in the table on the Custom Field Definitions tab.

Editing a Custom Field Definition

To edit a custom field definition

- 1** Click **Account > Account Details**. The Account Setup and Maintenance page opens, displaying the Account Details tab.
- 2** Click the **Custom Field Definitions** tab.

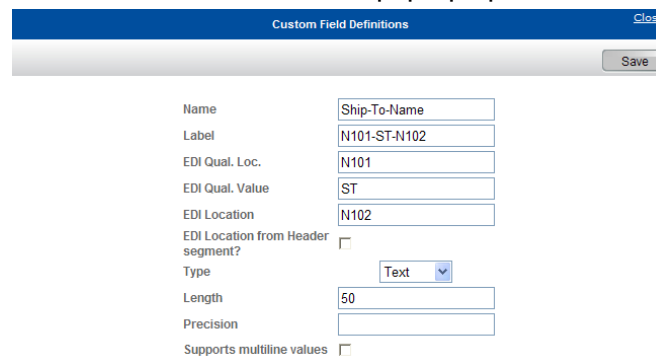
Custom field information displays for existing custom fields.

The screenshot shows the 'Account Setup and Maintenance' interface. At the top, there are navigation icons and a search bar. Below the search bar, there are tabs for 'Account Details', 'GS1 (UCC/EAN) Company Prefixes', and 'Custom Field Definitions'. The 'Custom Field Definitions' tab is active, displaying a table with the following data:

<input type="checkbox"/>	Name	Label	EDI Qual. Loc.	EDI Qual. Value	EDI Location	EDI Header Flag	Type	Length	Precision	Multiline
<input type="checkbox"/>	Retailer-Specific-PID	G3902-CB-G3903	G3902	CB	G3903	N	Text	50		Y
<input type="checkbox"/>	Ship-To-Name	N101-ST-N102	N101	ST	N102	N	Text	50		N
<input type="checkbox"/>	Ship-To-Number	G3902-ST-G3903	G3902	ST	G3903	N	Number	50	2	N

- In the Name column, click the hyperlink of the custom field definition that you want to edit.

The Custom Field Definitions pop-up opens.



- Edit the following fields:

- **Name**—Required. Type the name of the custom field.
- **Label**—Optional, but if you leave it blank, the system creates a label that is identical to the name. Type a description for the custom field that identifies the field and has meaning to you. The description does not need to be unique.
- **EDI Qual. Loc.**—Optional, but must be present if **EDI Qual. Value** is present.
Type the EDI location for the qualifier. The location consists of the EDI segment and position. For example, type **N101**. N1 refers to the segment and 01 refers to the field position.
- **EDI Qual. Value**—Optional, but must be present if **EDI Qual. Loc.** is present.
Type a value for the EDI qualifier. For example, type **ST**.
- **EDI Location**—Required if an EDI 888 document is used to populate custom field values (optional, if the UI used to populate values).
Type the EDI location (segment and position) that holds the value associated with this Product for a specific vendor/retailer relationship.
- **EDI Location from Header segment?**—Optional. Select the check box to indicate that you want **EDI Location** (segment and position) to be determined by the Header level (not the Detail level).
Note: Use this check box for situations where there are two custom field definitions that both have the same EDI Location (for example, N104), but one custom field definition refers to the Header level and one refers to the Detail level. The custom definition that refers to the Header level has this check box selected.
- **Type**—Required. From the drop-down list, select the data type for the value associated with this Product for a specific vendor/retailer relationship. The value resides in the location specified by **EDI Location** (for example, N102):
 - **Text**—Indicates that value is alphanumeric

- **Number**—Indicates that the value is numeric
- **Length**—Required. Type the maximum length for the value you want to associate with the Product.
- **Precision**—If you selected Number in the **Type** field, enter the maximum number of digits that are allowed to the right of the decimal point for the value you want to associate with the Product. If the number is not a decimal, leave this field blank.
- **Supports multiline values**—Optional. Select the check box to create a custom field definition that allows you to define multiple lines of custom field values for a single custom field definition.

Note: If the check box was originally selected and you clear it, a dialog box asks you to verify that you want to make the change. If you click OK and save your changes, you are effectively changing the custom field from supporting multiline values to only supporting a single value. This results in the deletion of all custom field values except the first one for each account, for all accounts in which the custom field definition is being used.

See “Using an EDI 888 Document to Populate Custom Field Values” on page 55 for a more detailed explanation of how some of these fields are used.

5 Click **Save**.

The custom field definition is saved and displays in the table on the Custom Field Definitions tab.

Viewing a Custom Field Definition

To view a custom field definition

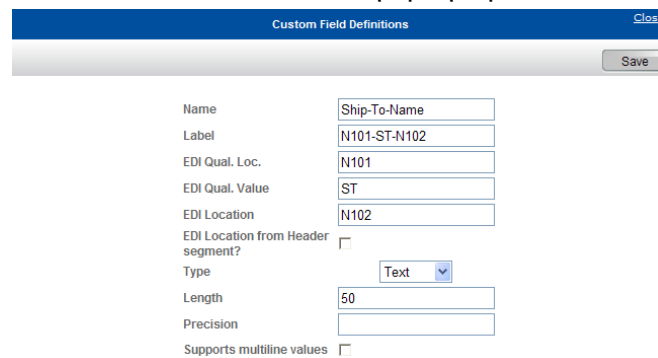
- 1** Click **Account > Account Details**. The Account Setup and Maintenance page opens, displaying the Account Details tab.
- 2** Click the **Custom Field Definitions** tab.

Custom field information displays for existing custom fields.

<input type="checkbox"/>	Name	Label	EDI Qual. Loc.	EDI Qual. Value	EDI Location	EDI Header Flag	Type	Length	Precision	Multiline
<input type="checkbox"/>	Retailer-Specific-PID	G3902-CB-G3903	G3902	CB	G3903	N	Text	50		Y
<input type="checkbox"/>	Ship-To-Name	N101-ST-N102	N101	ST	N102	N	Text	50		N
<input type="checkbox"/>	Ship-To-Number	G3902-ST-G3903	G3902	ST	G3903	N	Number	50	2	N

- In the Name column, click the hyperlink of the custom field definition you want to view.

The Custom Field Definitions pop-up opens.



- View the following fields:

- **Name**—The name of the custom field.
- **Label**—The description for the custom field.
- **EDI Qual. Loc.**—Present if **EDI Qual. Value** is present.

The EDI location for the qualifier. The location consists of the EDI segment and position. For example, N101. N1 refers to the segment and 01 refers to the field position.

- **EDI Qual. Value**—Present if **EDI Qual. Loc.** is present.

The value for the EDI qualifier.

- **EDI Location**—Specified if an EDI 888 document is used to populate custom field values (optional, if the UI used to populate values). The EDI location (segment and position) that holds the value associated with this Product for a specific vendor/retailer relationship.

- **EDI Location from Header segment?**—If the check box is selected, **EDI Location** (segment and position) is determined by the Header level (not the Detail level).

Note: This check box is used for situations where there are two custom field definitions that both have the same EDI Location (for example, N104), but one custom field definition refers to the Header level and one refers to the Detail level. The custom definition that refers to the Header level has this check box selected.

- **Type**—The data type for the value associated with this Product for a specific vendor/retailer relationship. The value resides in the location specified by the EDI Location field (for example, N102):

- **Text**—Indicates that the value is alphanumeric
- **Number**—Indicates that the value is numeric

- **Length**—The maximum length for the value you want to associate with the Product.

- **Precision**—If Number is selected in the **Type** field, this value is the maximum number of digits that are allowed to the right of the decimal

point for the value that is associated with the Product. If the number is not a decimal, this field is blank.

- **Supports multiline values**—If the check box is selected, the custom field definition allows you to define multiple lines of custom field values for a single custom field definition.

See “Using an EDI 888 Document to Populate Custom Field Values” on page 55 for a more detailed explanation of how some of these fields are used.

Deleting a Custom Field Definition

When you delete a custom field definition, all custom field values associated with that custom field definition are also deleted. A retailer will not be able to view deleted custom field definitions or deleted custom field values.

To delete a custom field definition

- 1 Click **Account > Account Details**. The Account Setup and Maintenance page opens, displaying the Account Details tab.
- 2 Click the **Custom Field Definitions** tab.
Custom field information displays for existing custom fields.

The screenshot shows the 'Account Setup and Maintenance' interface. At the top, there are navigation icons and a search bar. Below the search bar, there are tabs for 'Account Details', 'GS1 (UCC/EAN) Company Prefixes', and 'Custom Field Definitions'. The 'Custom Field Definitions' tab is active, displaying a table with the following data:

<input type="checkbox"/>	Name	Label	EDI Qual. Loc.	EDI Qual. Value	EDI Location	EDI Header Flag	Type	Length	Precision	Multiline
<input type="checkbox"/>	Retailer-Specific-PID	G3902-CB-G3903	G3902	CB	G3903	N	Text	50		Y
<input type="checkbox"/>	Ship-To-Name	N101-ST-N102	N101	ST	N102	N	Text	50		N
<input type="checkbox"/>	Ship-To-Number	G3902-ST-G3903	G3902	ST	G3903	N	Number	50	2	N

- 3 Select the check box to the left of the custom field definition you want to delete.
- 4 Click **Delete**. A message asks if you want to proceed with deletion of the custom field definition.
- 5 Do one of the following:
 - To delete the custom field definition, click **OK**. A message confirms the deletion or reports an error.
 - To cancel the deletion, click **Cancel**.

Note: When you delete a custom field definition, all custom field values associated with that custom field definition are also deleted. A retailer will not be able to view deleted custom field definitions or deleted custom field values.

Working with Attribute Filters

5

OpenText Active Catalogue supports hundreds of GTIN attributes, many of which are not applicable to each GTIN. For example, a merchandise and apparel account typically will use an attribute filter that does not include nutritional facts attributes. This section explains how to apply, create, and modify attribute filters to restrict the display and export of attributes to only those attributes relevant to your business.

The currently active attribute filter is displayed at the top of the pages listing GTIN attributes.

The two types of attribute filters are:

- **System filters**—Maintained by OpenText Administrators
- **Account filters**—Created, maintained, and applied by users in the account

Some accounts may use only System filters.

This section is organized as follows:

- [“Attribute Filter Access Rights” on page 68.](#)
- [“GTIN Attribute Groups” on page 69.](#)
- [“About Default Attribute Filters” on page 69.](#)
- [“Finding Attribute Filters” on page 70.](#)
- [“Filtering the Attribute Filter List” on page 71.](#)
- [“Viewing an Attribute Filter” on page 71.](#)
- [“Applying an Attribute Filter to Your Current Session” on page 72.](#)
- [“Assigning a User Default Attribute Filter for Future Sessions” on page 72.](#)
- [“Adding an Attribute Filter” on page 73.](#)
- [“Adding an Attribute Filter By Copying and Modifying an Existing Filter” on page 74.](#)
- [“Editing an Attribute Filter” on page 74.](#)
- [“Deleting an Attribute Filter” on page 75.](#)

Attribute Filter Access Rights

The following user access rights apply to working with attribute filters:

- **Edit**—You can add, edit, delete and apply Account attribute filters, apply System attribute filters, and select a filter for a download or subscription profile.
- **View**—You cannot add, edit, or delete filters, but can apply filters and select a filter for a download or subscription profile.
- **Restricted**—You can view but not work with or apply attribute filters.

GTIN Attribute Groups

The hundreds of GTIN attributes supported by OpenText Active Catalogue are organized in Attribute Groups.

An attribute filter contains one or more Attribute Groups. The filter may or may not include all of the attributes in an Attribute Group.

The GTIN details pages list all attributes contained in an Attribute Group and included in the attribute filter currently applied during the browser session. See [“Viewing GTIN Details” on page 95](#).

The OpenText Active Catalogue Attribute Groups are as follows:

- Common Logistics
- Common Retail
- Extended Logistics
- Extended Retail
- GDSN
- GDSN Optional
- Hardlines
- Nutrition
- Nutritional Supplements
- Pet Food
- Pharmaceutical

About Default Attribute Filters

OpenText assigns the account's default attribute filter to all new users. The default filter is automatically applied when you log on.

Accounts interfacing with the GDS network generally use the GDSN filter as the default attribute filter when creating and viewing the GTIN information.

Default filters exist at the account level, not the individual user level.

Note: If you change your account's default attribute filter, the change will apply only to users added to your account after the change. Existing users will retain their existing default filter.

After logging on, you can temporarily override the default attribute filter by applying a filter. See [“Applying an Attribute Filter to Your Current Session” on page 72](#).

You can change the default attribute filter from two locations:

- **Account > Account Details**
- **Administration > Account Attribute Filters**

To change the account default attribute filter from Account category

- 1 Click **Account > Account Details**. The Account Details page opens.
- 2 On the Account Details tab, from the **Default Attribute Filter** drop-down list,

Account Preference

Date Format: DD/MM/YY

Default Attribute: GMA

Filter:

select an attribute filter.

- 3 Click **Save**.

To change the account default attribute filter from Administration category

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- 2 Select the attribute filter you want to assign as your account default attribute filter.
- 3 Click **Account**. A message indicates that the attribute filter was successfully set as your account default filter.

Finding Attribute Filters

Find an attribute filter so that you can do one of the following:

- View the attributes it contains
- Apply it as the account default attribute filter. See ["About Default Attribute Filters" on page 69](#).
- Apply it as your own temporary filter during the current session. See ["Applying an Attribute Filter to Your Current Session" on page 72](#)

To find an attribute filter

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens listing all System and Account attribute filters.

The screenshot shows the 'Attribute Filter List' interface. At the top, there are navigation icons and buttons for 'Apply', 'Account', and 'User'. Below this is a 'Filter' section with a search bar for 'Filter Name' and a dropdown for 'Filter Type', along with 'Filter' and 'Clear Filter' buttons. The main part of the interface is a table with the following data:

<input type="checkbox"/>	Filter Name	Filter Description	Filter Type
<input type="checkbox"/>	all attributes	all possible catalog attributes	System
<input type="checkbox"/>	BROWN SHOE	RETAILER ATTRIBUTES	System
<input type="checkbox"/>	CPG	Consumer Packaged Goods Filter	System
<input type="checkbox"/>	GDSN	GDSN	System

The table displays from left:

- Check box to select an attribute filter to delete, copy, or assign as an account or user default attribute filter.
 - **Filter Name**—The name of the filter.
 - **Filter Description**—The description of the filter.
 - **Filter Type**—Whether the filter is a system or account filter
- 2 To find an attribute filter, do any of the following:
 - Click **Filter** to filter the Attribute Filter List. See [“Filtering the Attribute Filter List” on page 71](#).
 - Scroll through the list.
 - Use the browse bar to move between pages.

Filtering the Attribute Filter List

You can use the filter to display a list of attribute filters based on the criteria you specify.

To filter the Attribute Filter list

- 1 On the Attribute Filter List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Filter Name**—Enter an attribute filter’s full or partial name.
 - **Filter Type**—To display only attribute filters of a specific type, from the drop-down list, select a filter type.
 - **System**—Show only system attribute filters.
 - **Account**—Show only account attribute filters.
- 2 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

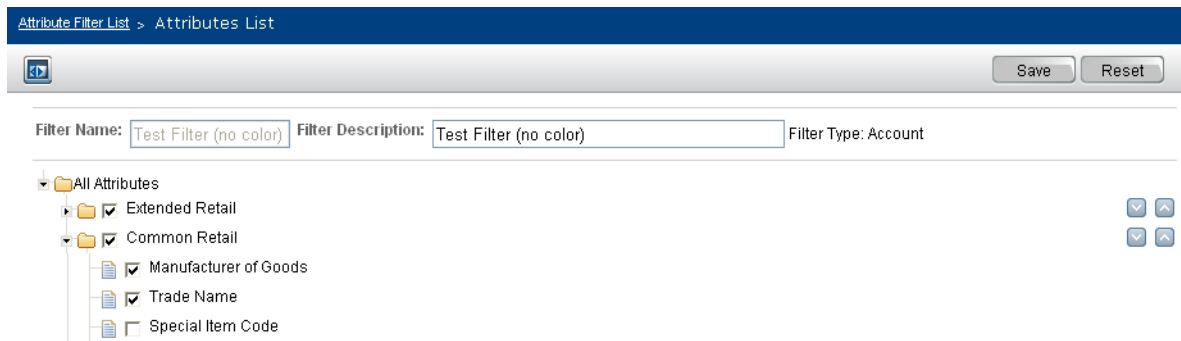
Viewing an Attribute Filter

By viewing an attribute group, you see the following:

- A list of attribute groups that are included in a filter
 - The attributes that are included in a filter
 - The order in which the attribute groups are displayed on the page in the filter
- To change a filter’s characteristics, see [“Editing an Attribute Filter” on page 74](#).

To view an attribute filter

- 1 Find the attribute filter. See [“Finding Attribute Filters” on page 70](#).
- 2 Click the **attribute filter name hyperlink** in the Filter Name column. The Attribute Filter List (tree view) page opens displaying a tree view of the attribute groups.



- 3 Click the arrow next to All Attributes to expand the tree to see the attribute groups. A check mark next to an attribute group indicates that the attribute group is included in the filter (although not all attributes in a group are necessarily selected to be in the filter).
- 4 To view an group's attributes and their format and definition, and to see which attributes are included in the filter, click the arrow next to an attribute group to expand the tree. A check mark next to an attribute indicates that the attribute is in the filter. Move your cursor over an attribute to view an attribute's format (allowable data type and length) and definition.
- 5 The order in which the attribute groups are displayed in the filter is the order that they are displayed on a page (*not* in exports) when the filter is used.

Applying an Attribute Filter to Your Current Session

To use a different filter in your current session

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- 2 Find the attribute filter you want to use. See ["Finding Attribute Filters" on page 70](#).
- 3 Select the check box next to the attribute filter you want to apply to your current session.
- 4 Click **Apply**. The selected filter is active until you apply a different filter or log out. When you log in again, your account default attribute filter is applied.

Assigning a User Default Attribute Filter for Future Sessions

To assign a user default filter for future sessions

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- 2 Find the attribute filter you want to assign as your *user* default filter. See ["Finding Attribute Filters" on page 70](#). It will be applied each time you log in. It is active until you apply a different filter.

- 3 Click **User**. A message indicates that the attribute filter was successfully set as your user default filter.

Adding an Attribute Filter

You can create an attribute filter from scratch or copy an existing filter and modify it. See [“Adding an Attribute Filter By Copying and Modifying an Existing Filter”](#) on page 74.

To add an attribute filter

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- 2 Click **Add**. The Attribute Filter List (tree view) page opens.

Filter Name: Filter Description: Filter Type: Account

- ▼ All Attributes
 - ▶ GDSN Optional
 - ▶ Pharmaceutical
 - ▼ Common Retail
 - Fabric Description
 - Warranty, Y/N
 - Manufacturer of Goods
 - Manufacturer's GLN
 - Odd Size Indicator

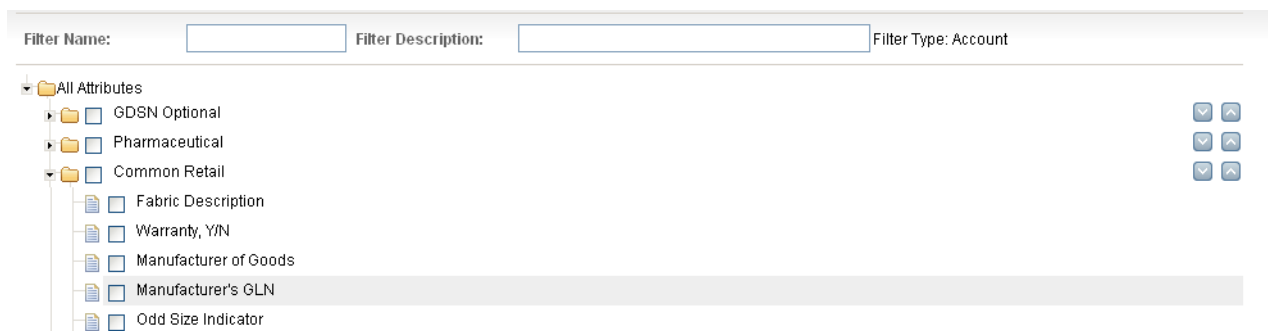
- 3 Enter a **Filter Name** and a **Filter Description**. The filter name must be unique and cannot be changed once the filter is saved.
- 4 The order in which the attribute groups are displayed in the filter is the order that they are displayed on a page (*not* in exports) when the filter is used. To change the sequence position, click the up and down arrows to the right of the attribute group to move it up or down in the list.
- 5 Click the arrow next to an attribute group to expand the tree and display the attributes that are in that group.
- 6 To include an attribute in your filter, select the check box next to the attribute. Move your cursor over an attribute to view an attribute's format (allowable data type and length) and definition.
Note: Selecting a check box at the attribute group level selects all attributes in that group. You can clear the attributes you do not want to include in the filter by deselecting individual attributes. Clearing a check box at the attribute group level clears all attributes in that group.
- 7 Click **Save** to save the filter.

Adding an Attribute Filter By Copying and Modifying an Existing Filter

To save time adding a new filter, you can copy an existing filter and modify it. The Attribute Groups, their display order, and the attributes in the selected filter will be copied for the new filter. You can modify these as needed.

To add an attribute filter by copying and modifying an existing filter

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- 2 Find the Attribute Filter that you want to copy and modify for the new filter. See ["Finding Attribute Filters" on page 70](#).
- 3 Click **Copy**. The Attribute Filter List (tree view) page opens.



- 4 Change the **Filter Name** and **Filter Description**. The filter name must be unique and cannot be changed once the filter is saved.
- 5 The order in which the attribute groups are displayed in the filter is the order that they are displayed on a page (*not* in exports) when the filter is used. To change the sequence position, click the up and down arrows to the right of the attribute group to move it up or down in the list.
- 6 Click the arrow next to an attribute group to expand the tree and display the attributes that are in that group. To add or remove attributes in your filter, select or clear the check box next to the attribute. Move your cursor over an attribute to view an attribute's format (allowable data type and length) and definition.
- 7 Selecting a check box at the attribute group level selects all attributes in that group. You can clear the attributes you do not want to include in the filter by deselecting individual attributes. Clearing a check box at the attribute group level clears all attributes in that group. Click **Save** to save the filter.

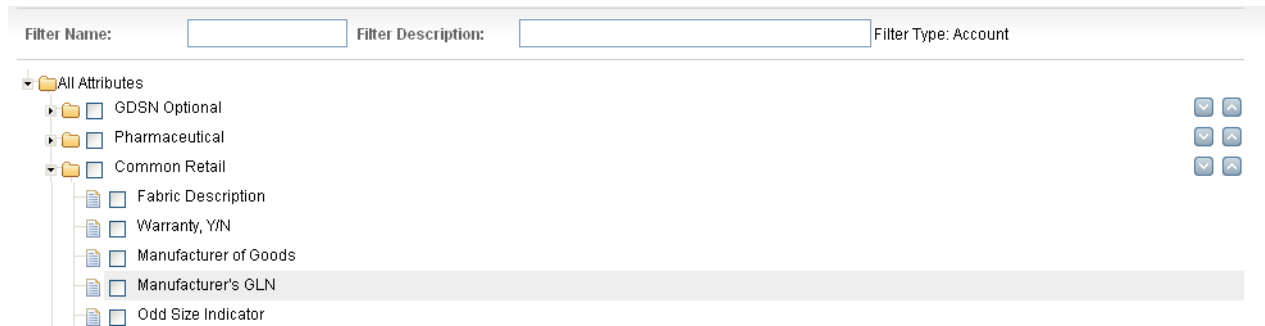
Editing an Attribute Filter

You can edit Account filters, but not System filters. You cannot edit a filter name.

To edit an Account attribute filter

- 1 Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.

- Click the **attribute filter name hyperlink** in the Filter Name column. The Attribute Filter List (tree view) page opens displaying a tree view of the attribute groups.



- Find the attribute filter to edit. See ["Finding Attribute Filters" on page 70](#).
- The order in which the attribute groups are displayed in the filter is the order that they are displayed on a page (*not* in exports) when the filter is used. To change the sequence position, click the up and down arrows to the right of the attribute group to move it up or down in the list.
- Click the arrow next to an attribute group to expand the tree and display the attributes that are in that group. To add or remove attributes in your filter, select or clear the check box next to the attribute. Move your cursor over an attribute to view an attribute's format (allowable data type and length) and definition.

Note: Selecting a check box at the attribute group level selects all attributes in that group. You can clear the attributes you do not want to include in the filter by deselecting individual attributes. Clearing a check box at the attribute group level clears all attributes in that group.
- Click **Save** to save the edited filter.

Deleting an Attribute Filter

Users can delete an Account attribute filter if the filter is not the current default attribute filter for the account. Only OpenText Administrators can delete System filters.

To delete an attribute filter

- Click **Administration > Account Attribute Filters**. The Attribute Filter List page opens.
- Find the attribute filter to delete. See ["Finding Attribute Filters" on page 70](#).
- Select the check box to the left of the filter name.
- Click **Delete**. A message box asks if you want to delete the selected filter.
- To permanently delete the filter, click **OK**.

Finding and Viewing Data

6

This section explains how to find and view vendor catalogue data. Vendors can search only their own catalogues. Retailers can search all catalogues to which they have access (either full catalogue access, or access only to specific Selection Codes).

Product data in a vendor catalogue is organized in a three-level structure:

- **Selection Codes**—3-digit identifiers for the broadest product groups in a catalogue, (for example, 300 is men's clothing); also used to restrict retailer access when retailer does not have unrestricted access to a catalogue
- **Products**—Specific Products under a Selection Code (for example, Vendor Item No., Style No.)
- **GTINs**—Specific items under a Product (for example, 123456123456, a 36-inch, leather belt)

Vendors create and maintain their own Selection Codes, Products, and GTINs.

Retailers with access to a vendor catalogue can view, download, and subscribe to automatic updates of vendor data. They can also add or edit custom field values for custom fields that have been previously defined by a vendor.

Both vendors and retailers can view an Item Search Ratio Report (see ["Item Search Ratio Report" on page 182](#)) which shows the ratio of found versus missed GTINs. The report is based on accounts for which there is data (with a maximum of 12 months of data).

- Retailers can view the ratio of found versus missed GTINs when they search vendors' or distributors' catalogues to which they have access.
- Vendors can view the ratio of found versus missed GTINs when they search retailer's catalogues.

This section is organized as follows:

- ["Using the Find Catalogue Data Page" on page 77.](#)
- ["Finding Selection Codes" on page 77.](#)
- ["Filtering a Selection Code List" on page 79.](#)
- ["Viewing Selection Code Details" on page 79.](#)
- ["Finding Products Across Selection Codes" on page 80.](#)
- ["Finding Products Under One Selection Code" on page 82.](#)
- ["Filtering a Product List" on page 84.](#)
- ["Copying Product Data that Displays on a Product List Page" on page 84.](#)
- ["Viewing Product Details" on page 86.](#)

- “Viewing Product Media” on page 87.
- “Finding GTINs Across Selection Codes” on page 88.
- “Finding GTINs Under One Product” on page 90.
- “Filtering a GTIN List” on page 92.
- “Copying GTIN Data that Displays on a GTIN List Page” on page 92.
- “Viewing GTIN Details” on page 95.
- “Viewing Item Media” on page 96.
- “Finding Container GTINs for a Component GTIN” on page 97.
- “Finding Component GTINs for a Container GTIN” on page 97.
- “Setting Internet Explorer (IE) Options for Copy Data to Table” on page 98.

Using the Find Catalogue Data Page

The Find Catalogue Data page is used in many of the following procedures for retrieving product data from your catalogue. The following procedures include partial page shots. To view the full page, refer back to the page shot below.

Open the Find Catalogue Data page by clicking **Catalogue > Advanced Search**.

Note: For your convenience, a search bar is available on most pages. By default, the search bar is closed when a page opens. You can open or close the search bar by clicking on it.

Except for the EQUAL MULTI option for a Product, the search bar displays the same search options that are available on the Find Catalogue Data page. Even though the search functionality is identical on the search bar and the Find Catalogue Data page (except for this difference), the options are displayed slightly differently in the two places. For specific information about the search bar, see [“Search Bar” on page 15](#).

Note: You cannot enter a copyright or registered trademark in a search field; no results are returned.

Finding Selection Codes

This section describes how to retrieve a list of Selection Codes.

To retrieve a Selection Code

- 1 Do one of the following:

- To view a list of all Selection Codes, click **Catalogue > Selection Code List**. The Selection Code List page opens. To filter the list, see “Filtering a Selection Code List” on page 79. Go to Step 4.
- To begin the Selection Code list with a specific value, click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.

2 Select **Selection Code**.

3 Do one of the following:

- To begin the list of Selection Codes with a specific value, select **BEGIN** from the drop-down list, and type those digits in the **Selection Code** field.
- To open the Product List for a specific Selection Code, select **EQUAL** from the drop-down list, and type the *full* **Selection Code** in the **Selection Code** field.

4 Click **Search**. The Selection Code List page opens.

Selection Code	Description	Products	GTINs
001	QTP_Test_001	0	0
002	SelCode 002	7	4

The table displays from left for each Selection Code:

- Check box to select Selection Code for download
 - **Selection Code**—The Selection Code identifier
 - **Description**—The description of the Selection Code
 - **Products**—The number of Products under the Selection Code (click the hyperlink to display the list of Products)
 - **GTINs**—The number of GTINs under the Selection Code (click the hyperlink to display the list of GTINs)
- 5 To locate a Selection Code in the list, do any of the following:
- Filter the Selection Code List. See “Filtering a Selection Code List” on page 79.

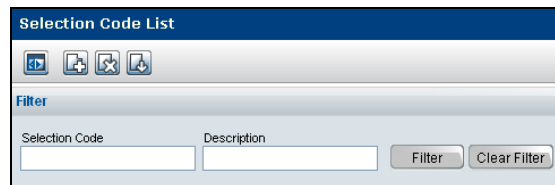
- Scroll down the list.
 - Use the browse bar to move between pages.
- 6 To display additional information, do any of the following:
- To view Selection Code details, click a Selection Code's hyperlink (in the Selection Code column).
 - To view a list of Products under a specific Selection Code, click the Product hyperlink (in the Products column) for that Selection Code.
 - To view a list of GTINs under a specific Selection Code, click the GTIN hyperlink (in the GTIN column) for that Selection Code.

Filtering a Selection Code List

You can use the filter to display a list of Products based on the criteria you specify.

To filter a Selection Code list

- 1 To view a list of all Selection Codes, click **Catalogue > Selection Code List**. The Selection Code List page opens.

The screenshot shows a web interface titled "Selection Code List". Below the title is a toolbar with four icons: a play button, a plus sign, a minus sign, and a refresh button. Below the toolbar is a "Filter" section with two input fields: "Selection Code" and "Description". To the right of these fields are two buttons: "Filter" and "Clear Filter".

- 2 Enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Selection Code**—Enter a full or partial Selection Code (3-digits)
 - **Description**—Enter a full or partial Selection Code description.
- 3 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

Viewing Selection Code Details

Selection Code details include the Selection Code identifier, Selection Code description, the quantity of Products and GTINs under the Selection Code, and other information.

To view Selection Code details

- 1 Find the Selection Code. See "[Finding Selection Codes](#)" on page 77.
- 2 On the Selection Code List page, click a Selection Code's hyperlink. The Selection Code Details popup opens. You can edit the description.

Selection Code	001
Description	Intimate Apparel
Products	9
GTINs	23
Catalogue Last Update	10/03/2007 14:53:29

Note: Catalogue Last Update is the date that the catalogue, not the Selection Code, was last updated.

To close the popup, click the **close** in the top right corner.

Finding Products Across Selection Codes

Use this procedure to retrieve Products.

To find Products across Selection Codes

- 1 Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.

- 2 Select **Product**.
- 3 Select one of the following Product search options:
 - **Identifier** - The Product identifier. Use **Identifier** with **EQUAL MULTI** in Step 4 to search for up to 10 products at once.
 - **Description** - The description of the Product
 - **Compressed** - The compressed Product identifier (leading zeros, spaces, and special characters are ignored)

If you perform a Compressed Product search, the system retrieves all Products with compressed product values that exactly match the value you type in the Product field. Compressed Product identifiers omit leading zeroes, spaces, and special characters in Product identifiers for purposes of the Product search.

For example, the Compressed Product identifier for 000324 MENS SHOES is 324MENSSHOES. Sending 324MENSSHOES in a Compressed Product search returns all Products with that sequence of characters, ignoring leading zeroes, spaces, and special characters in the actual Product identifiers.

- 4 Select one of the following:
 - **BEGIN** - To return all Products that begin with a specific alphanumerical value, select **BEGIN** from the Product drop-down list, and type a full or

partial Product identifier or description in the field. This field has auto-fill. See "Auto-Fill" on page 16.

- **EQUAL** - To display only a specific Product, select **EQUAL** from the Product drop-down list (EQUAL is automatically selected and is the only option for Compressed), and type the full Product identifier, exact description, or full compressed Product identifier in the field.
- **CONTAINS** - To return all Products that contain a specific alphanumeric value, select **CONTAINS** from the Product drop-down list, and type a full or partial Product identifier or description in the field. This field has auto-fill. See "Auto-Fill" on page 16.
- **EQUAL MULTI** - To display up to 10 Products, select **EQUAL MULTI** from the Product drop-down list (EQUAL MULTI can only be selected if Identifier is selected in Step 3), and type the full Product identifiers, one in each field, for up to 10 Products. To clear all Product identifier fields, click **Clear Product Values**.

The screenshot shows a search interface with a 'Product' dropdown menu set to 'EQUAL MULTI'. Below it are three columns of input fields for product identifiers. The first column contains 'EMPTYCONTAINERS', 'DELPROD1000', and 'B271250J'. The second column contains 'UIPROD1', 'DELPROD1012', and 'B271252J'. The third column contains 'UIPROD10', 'VL-ANGELO', and 'IAPROD2'. A 'Clear Product Values' button is located at the bottom of the input fields.

5 Click **Search**. The Cross Selcode Product List page opens.

The screenshot shows the 'Cross Selcode Product List' page. It includes a search bar with filters for 'Product', 'Description', and 'Compressed Product'. Below the search bar, it displays company information: 'Company Name: KIBBLES N BITS', 'Account Number: 125103335555', and 'Total results found: 10'. A table of results is shown below, with columns for Product, Description, Selcode Name, Selcode Description, Create Date, Last Update Date, GTINs, GTIN Filter, and Images.

Product	Description	Selcode Name	Selcode Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
003PRD	SAUTER CUSTOM BELT DESC	001	Intimate Apparel	08/24/2006	04/15/2008	1	1	1
003PRD-NEW CLONED	SAUTER CUSTOM testing	001	Intimate Apparel	04/08/2008		0	0	0
004PRD	SAUTER CUSTOM BELT	004	NASCAR CATS 764576	08/25/2006	08/25/2006	0	0	1

Note: Only products that exist are listed. If no Products exist, an error message is displayed.

The table displays from left:

- Check box to select the Product for the download basket
- **Product**—The Product identifier
- **Description**—The description of the Product
- **Selcode Name**—The Selection Code above the Product
- **Selcode Description**—The description of the Selection Code above the Product

- **Create Date**—The date the Product was loaded into OpenText Active Catalogue
 - **Last Update Date**—The date the Product was last updated
 - **GTINs**—The number of GTINs under the Product (click the hyperlink to display the list of GTINs).
 - **GTIN Filter**—The number of GTINs under the Product (click the hyperlink to display a blank GTIN list screen; you can then filter to display only those GTINs whose criteria you specify). See [“Filtering a GTIN List” on page 92](#).
 - **Images**—The number of images associated with the Product (click the hyperlink to display the list of images)
- 6** To locate a Product in the list:
- Filter the Product list. See [“Filtering a Product List” on page 84](#).
 - Scroll down the list.
 - Use the browse bar to move between pages.
- 7** To display additional information, do any of the following:
- To view Product details, click a Product hyperlink (in the Product column).
 - To view a list of GTINs under a specific Product, click the GTIN hyperlink (in the GTIN column) for that Product.
 - To view a list of images under a specific Product, click the image hyperlink (in the Image column) for that Product.

Finding Products Under One Selection Code

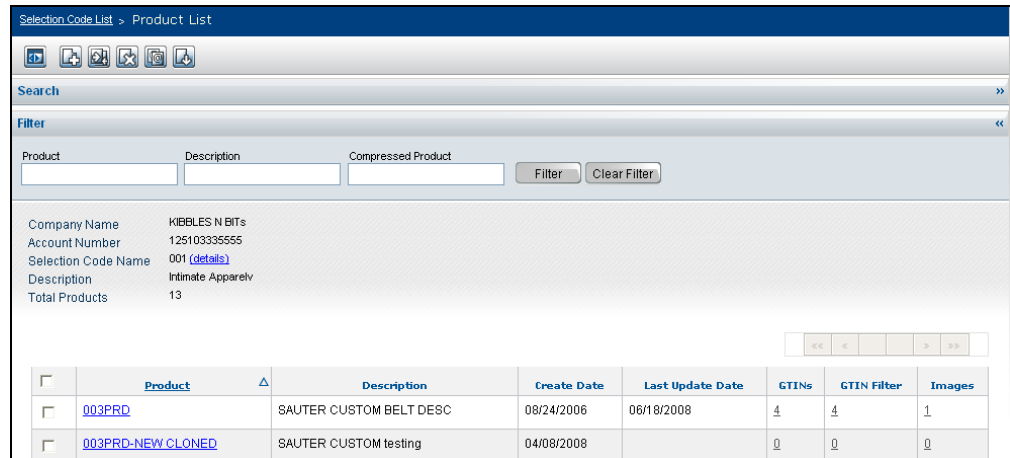
Use this procedure to display a list of Products for a specific Selection Code. As an optional method, on the Selection Code List page, click a hyperlink in the Products column. The Product List page will open.

To find Products under one Selection Code

- 1** Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.

- 2** Select **Selection Code**.
- 3** Select **EQUAL** from the Selection Code drop-down list and type the full Selection Code identifier.
- 4** Click **Search**. The Product List page opens listing Products under the Selection Code.

If no Products exist, the Add Products page opens to prompt you to add Products under the Selection Code.



The table displays from left:

- Check box to select the Product for the download basket
- **Product**—The product identifier
- **Description**—The description of the Product
- **Create Date**—The date the Product was loaded into OpenText Active Catalogue
- **Last Update Date**—The date the Product was last updated
- **GTINs**—The number of GTINs under the Product (click the hyperlink to display the list of GTINs).
- **GTIN Filter**—The number of GTINs under the Product (click the hyperlink to display a blank GTIN list screen; you can then filter to display only those GTINs whose criteria you specify). See [“Filtering a GTIN List” on page 92](#).
- **Images**—The number of images associated with the Product (click the hyperlink to display the list of images)

5 To locate a Product in the list:

- Filter the Product list. See [“Filtering a Product List” on page 84](#).
- Scroll down the list.
- Use the browse bar to move between pages.

6 To display additional information, do any of the following:

- To view Selection Code details, click the details hyperlink in the header information next to Selection Code Name.
- To view Product details, click a Product hyperlink (in the Product column).
- To view a list of GTINs under a specific Product, click the GTIN hyperlink (in the GTIN column) for that Product.
- To view a list of images under a specific Product, click the image hyperlink (in the Image column) for that Product.

Filtering a Product List

You can use the filter to display a list of Products based on the criteria you specify.

To filter a Product list

1 On the Product List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.

- **Product**—Enter a Product’s full or partial Product identifier.
- **Description**—Enter a Product’s full or partial description.
- **Compressed Name**—Enter the Product’s full or partial compressed Product identifier (leading zeros, spaces, and special characters are ignored)

If you perform a Compressed Product search, the system retrieves all Products with compressed product values that exactly match the value you type in the Product field. Compressed Product identifiers omit leading zeroes, spaces, and special characters in Product identifiers for purposes of the Product search.

For example, the Compressed Product identifier for 000324 MENS SHOES is 324MENSSHOES. Sending 324MENSSHOES in a Compressed Product search returns all Products with that sequence of characters, ignoring leading zeroes, spaces, and special characters in the actual Product identifiers.

2 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Copying Product Data that Displays on a Product List Page

You can use the “Copy Data to Table” feature to copy to a table the Product data that displays on any Product List page. You can view the data in the table or save the data to a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application.

Note: Be sure to set the required Internet Explorer options so you can successfully use this feature. See [“Setting Internet Explorer \(IE\) Options for Copy Data to Table” on page 98](#).

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data table will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the table will not display.

The Copy Data to Table icon appears on the button bar of the following Product List pages:

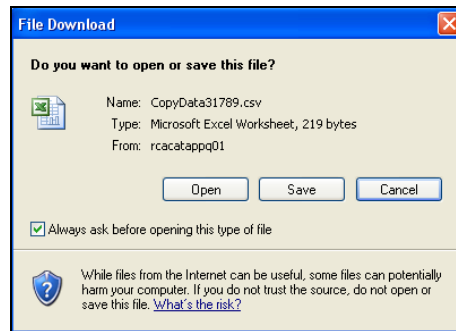
- Product List page - All data from this page is copied to the table.
- Cross Selection Code Product List page - All data from this page is copied to the table.

To copy the Product data that displays on a Product List page

1 On a Product List page, click **Copy Data to Table**.

One of the following occurs:

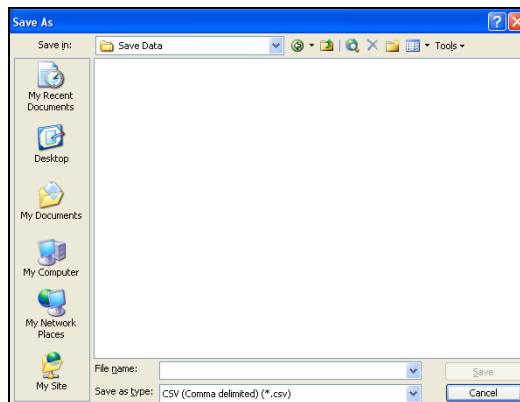
- A table opens displaying the Product data. Go to Step 3 (you can skip Step 2 unless the File Download dialog box opens).
- The File Download dialog box opens asking if you want to open the file or save it to your computer.



Note: The File Download dialog box will always open unless you deselect the **Always ask before opening this type of file** check box. This prevents the “Do you want to open or save this file” question from being asked every time you want to copy data to a table. Continue with Step 2.

2 Do one of the following:

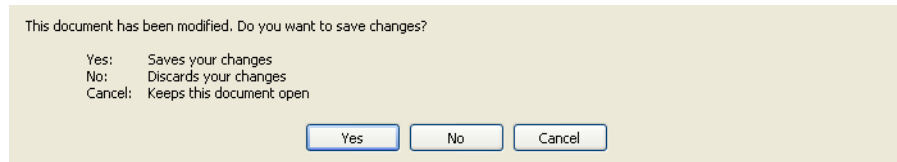
- **Open** - To display the Product data in a table format, click **Open**. Go to Step 3.
- **Save** - To save the file as a CSV text file that you can open later in Microsoft Excel, click **Save**. The Save As dialog box opens.



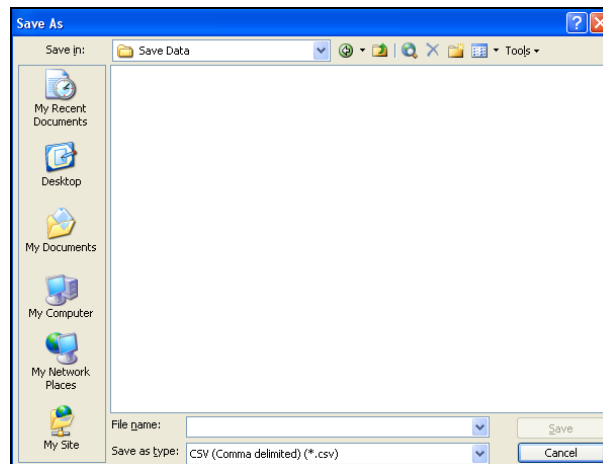
Do all of the following:

- Navigate to the location where you want to save the file.
 - In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, MensShirts.csv
 - Click **Save**. The file is saved to the location you selected.
 - **Cancel** - To cancel your action, click **Cancel**.
- 3 Once the table is open, you can select rows and columns of Product data to copy. When you want to close the table, click the X in the upper right corner of the window.

If you modified the table, a dialog box appears when you close the window and asks if you want to save your changes.



To save your changes, click **Yes**. The Save As dialog box opens.



Do all of the following:

- Navigate to the location where you want to save the file.
- In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, MensShirts.csv
- Click **Save**. The file is saved to the location you selected.

Viewing Product Details

Product details include the Product name (identifier), Product description, extended description, the quantity of GTINs under the Product, and other information.

To view Product details

- 1 Find the Product:
 - See ["Finding Products Across Selection Codes"](#) on page 80.
 - See ["Finding Products Under One Selection Code"](#) on page 82.
- 2 On the Product List page, click a Product's hyperlink (in the Product column). The Edit Product page opens. You can edit the description and extended description.

Selection Code List > Product List > Edit Product

Standard Product Attributes

Product: PRODUCTTEST1
 Description: PRODUCTTEST1 Desc
 Extended Description:
 GTINs: 3
 Images: 0

Viewing Product Media

Product media includes image attribute information at the Product level, such as the image description and image filename, as well as any physical image.

To view Product media

- 1 Find the Product. See one of the following:
 - “Finding Products Across Selection Codes” on page 80.
 - “Finding Products Under One Selection Code” on page 82.

The Product List page opens.

- 2 Click the image hyperlink (in the Image column) for the Product.

<input type="checkbox"/>	Product	Description	Create Date	Last Update Date	GTINs	GTIN Filter	
<input type="checkbox"/>	IMAGEPROD2	Image Product 2	08/19/13	08/19/13	2	2	

The Product Media page opens.

The image attribute information displays. If a physical image has been uploaded, a watermarked image displays. If no physical image has been uploaded, a OpenText watermark displays, as shown in this example.


Note: If you an download image, it will have a higher resolution and will not be watermarked. Downloading an image (or other data) is a billable action.

Selection Code List > Product List > Product Media

Company Name: KOBLES N BITS
 Account Number: 12510333555
 Selection Code: 012
 Description: 012 Images
 Product: BIA-GEPROD2
 Product Description: Image Product 2
 Images: 2

Product Image

Color Code:
 File Name: myrdimagePD.jpg
 File Type: JPG-JPEG
 Image Type: 5x-58 Shot
 Purpose: INT-Internet
 Orientation: 5DR-Side Right
 Location Type: LMI
 External Location: my local media_identifier
 File Size: 9127
 Pixel Density (DPI): 120
 Height: 640
 Width: 400
 Image Style: PRO-Product
 Facing (GDSN): 2-Left
 Angle: 9-Right, Plunge angle present
 Clipping Path: ClipWide
 Image Description: PDing Descr



If there is additional Product media associated with this Product, you can view more image attribute information by using the scroll bar.

3

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-

Finding GTINs Across Selection Codes

Use this procedure to retrieve a list of GTINs across Selection Codes.

To find GTINs by searching across Selection Codes

- 1 Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.
- 2 Select **GTIN**.
- 3 Do one of the following:

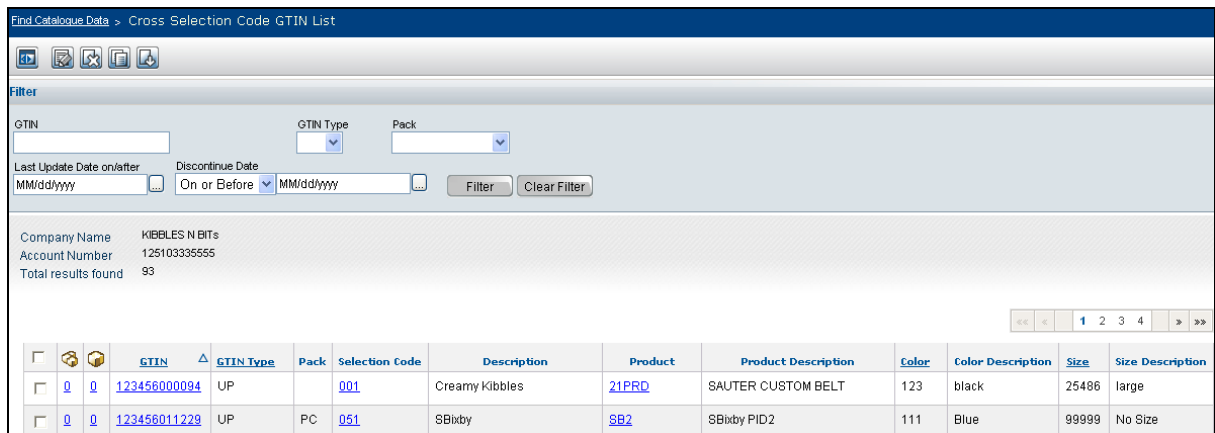
- To display only a specific GTIN, select **EQUAL** from the GTIN drop-down list and type the full GTIN in the field. If you use the option below to search for GTINs created/updated after a certain date, you can leave this field blank.

Optionally, type a date (MM/DD/YYYY format) in the **Create/Update Date on/after** field (or click **Auto Calendar** and select a date from the calendar).

- To return all GTINs that numerically follow a value, select **BEGIN** from the GTIN drop-down list, and type a partial GTIN (at least the first six digits) in the field. If you use the option below to search for GTINs created/updated after a certain date, you can leave this field blank. Then select the **GTIN Type** from the drop-down list. See "[GTIN Number Structures](#)" on page 256.

Optionally, type a date (MM/DD/YYYY format) in the **Create/Update Date on/after** field (or click **Auto Calendar** and select a date from the calendar).

4 Click **Search**. The Cross-Selection Code GTIN List page opens.



The table includes from left for each GTIN:

- Check box to select the GTIN for download
 - **Component**—The number of components for a GTIN (to view the GTIN components, click the hyperlink)
 - **Container**—The number of containers for a GTIN (to view the GTIN containers, click the hyperlink)
 - **GTIN**—The GTIN identifier (to view GTIN details, click the GTIN hyperlink)
 - **GTIN Type**—The type of GTIN. See ["GTIN Number Structures"](#) on page 256.
 - **Pack**—Container code or component indicator. See ["Container and Component GTIN Codes"](#) on page 258.
 - **Selection Code**—The Selection Code above the GTIN (click the hyperlink to view the Selection Code details)
 - **Description**—The description of the Selection Code above the GTIN
 - **Product**—The Product identifier above the GTIN (click the hyperlink to view the Product details)
 - **Product Description**—The description of the Product above the GTIN
 - **Color**—Color code for the GTIN
 - **Color Description**—Color description for the GTIN
 - **Size**—Size code for the GTIN
 - **Size Description**—Size description for the GTIN
- 5 To locate a GTIN in the list, do any of the following:
- Filter the GTIN list. See ["Filtering a GTIN List"](#) on page 92.
 - Scroll down the list.
 - Use the browse bar to move between pages.
- 6 To view GTIN information, do any of the following:
- To view GTIN details, click the GTIN hyperlink in the GTIN column.

- To view GTIN components for a GTIN click the hyperlink in the Components column
- To view GTIN containers for a GTIN, click the hyperlink in the Containers column.

Finding GTINs Under One Product

Use this procedure to retrieve GTINs under a specific Product if you already know the Product.

To find GTINs under a specific Product

- 1 Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.
- 2 Select **Product**.
- 3 Select one of the following Product search options:
 - **Identifier**—The Product identifier
 - **Description**—The description of the Product
 - **Compressed**—The compressed Product identifier (leading zeros, spaces, and special characters are ignored)

If you perform a Compressed Product search, the system retrieves all Products with compressed product values that exactly match the value you type in the Product field. Compressed Product identifiers omit leading zeroes, spaces, and special characters in Product identifiers for purposes of the Product search.

For example, the Compressed Product identifier for 000324 MENS SHOES is 324MENSSHOES. Sending 324MENSSHOES in a Compressed Product search returns all Products with that sequence of characters, ignoring leading zeroes, spaces, and special characters in the actual Product identifiers.

- 4 Select **EQUAL** from the Product drop-down list (EQUAL is automatically selected and is the only option for Description and Compressed), and type the full Product identifier, description, or compressed Product identifier in the field.
- 5 Click **Search**. The GTIN List page opens.

The screenshot shows the 'Find Catalogue Data > GTIN List' page. The filter section includes fields for GTIN, GTIN Type, Pack, Color, Size, Last Update Date, and Discontinue Date. Below the filter is a summary of product details for 'KIBBLES N BITS' and a table listing the found GTIN.

Company Name	KIBBLES N BITS												
Account Number	12510333555												
Selection Code Name	001 (details)												
Description	Creamy Kibbles												
Product Name	21PRD (details)												
Product Description	SAUTER CUSTOM BELT												
Total GTINs	1												

GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
0 0 123456000094	UP	123	black	25486	large	10.00	08/07/2004					0

The table displays from left the following for each GTIN:

- Check box to select the GTIN for download
 - **Component**—The number of components for a GTIN (to view the GTIN components, click the hyperlink)
 - **Container**—The number of containers for a GTIN (to view the GTIN containers, click the hyperlink)
 - **GTIN**—The GTIN identifier (to view GTIN details, click the GTIN hyperlink)
 - **GTIN Type**—The type of GTIN. See ["GTIN Number Structures" on page 256](#).
 - **Pack**—The container code or component indicator. See ["Container and Component GTIN Codes" on page 258](#).
 - **Color**—Color code for the GTIN
 - **Color Description**—Color description for the GTIN
 - **Size**—Size code for the GTIN
 - **Size Description**—Size description for the GTIN
 - **Published Cost**—The unit cost of the GTIN
 - **Suggested Retail**— The suggested retail price of the GTIN
 - **Create Date**—The date the GTIN was loaded to OpenText Active Catalogue
 - **Last Update Date**—The date the GTIN was last updated
 - **Discontinue Date**—The date the GTIN will be discontinued in OpenText Active Catalogue
 - **Images**—The number of images associated with the GTIN (click the hyperlink to display the list of images)
- 6** To locate a GTIN in the list, do any of the following:
- Filter the GTIN list. See ["Filtering a GTIN List" on page 92](#).
 - Scroll down the list.
 - Use the browse bar to move between pages.
- 7** To view GTIN information, do any of the following:
- To view GTIN details, click the GTIN hyperlink in the GTIN column.
 - To view GTIN components for a GTIN click the hyperlink in the Components column
 - To view GTIN containers for a GTIN, click the hyperlink in the Containers column.
 - To view all of the GTINs that are under the same Product as this GTIN, click the Product link in the header (to view Product details, click the details link).
 - To view all of the Products that are under the same Selection Code as this GTIN, click the Selection Code link in the header (to view Selection Code details, click the details link).

Filtering a GTIN List

You can use the filter to display a list of GTINs based on the criteria you specify.

To filter a GTIN list

- 1 On the GTIN List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.

- **GTIN**—Enter a full or partial GTIN
 - **GTIN Type**—To display only GTINs of a selected type (UP, EN, EO, UA, UK, UE), select a GTIN type from the drop-down list
 - **Pack**—To display GTINs with a particular container designation, select one of the following from the drop-down list
 - **Container**—Display only GTINs that are containers
 - **Not a Container**—Display only GTINs that are not containers
 - **Color**—To display GTINs with a specific color code, select a color code from the drop-down list.
 - **Size**—To display GTINs with a specific size code, select a size code from the drop-down list
 - **Last Update Date on/after**—To display only GTINs added or updated on or after this date, enter a date (MM/DD/YYYY Y format) or click **Auto Calendar** and select a date.
 - **Discontinue Date**—To display only GTINs discontinued on/before or after a date, select the appropriate choice from the drop-down list and enter a date (MM/DD/YYYY Y format) or click **Auto Calendar** and select a date.

Note: You cannot enter a date greater than 12-31-2049.

 - **On or Before**—Display only GTINs that are discontinued on or before the specified date
 - **After**—Display only GTINs that are discontinued after the specified date
- 2 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Copying GTIN Data that Displays on a GTIN List Page

You can use the “Copy Data to Table” feature to copy to a table the GTIN data that displays on any GTIN List page. You can view the data in the table or save the data to a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application.

Be sure to see “[Setting Internet Explorer \(IE\) Options for Copy Data to Table](#)” on [page 98](#) to set the required Internet Explorer options so you can successfully use this feature.

Note: If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data table will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the table will not display.

The Copy Data to Table icon appears on the button bar of the following GTIN List pages.

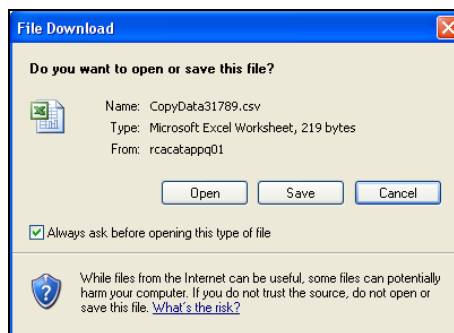
- GTIN List page - In addition to all data on the page, the following values are copied to the table: Published Cost and Suggested Retail.
- Cross Selection Code GTIN List page - In addition to all data on the page, the following values are copied to the table: Published Cost, Suggested Retail, Discontinue Date, Create Date, and Last Update Date.

To copy the GTIN data that displays on a GTIN List Page

- 1 On a GTIN List page, click **Copy Data to Table**.

One of the following occurs:

- A table opens displaying the GTIN data. Go to Step 3 (you can skip Step 2 unless the File Download dialog box opens).
- The File Download dialog box opens asking if you want to open the file or save it to your computer.

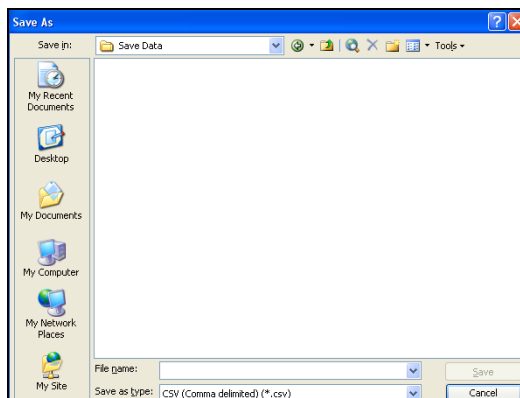


Note: The File Download dialog box will always open unless you deselect the **Always ask before opening this type of file** check box. This prevents the “Do you want to open or save this file” question from being asked every time you want to copy data to a table. Continue with Step 2.

- 2 Do one of the following:

- **Open** - To display the GTIN data in a table format, click **Open**. Go to Step 3.

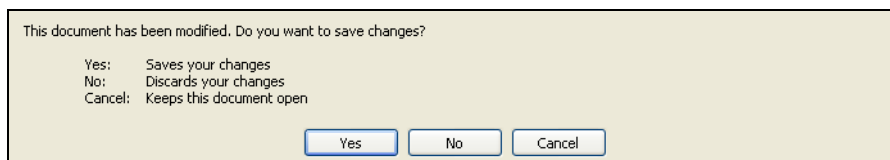
- **Save** - To save the file as a CSV text file that you can open later in Microsoft Excel, click **Save**. The Save As dialog box opens.



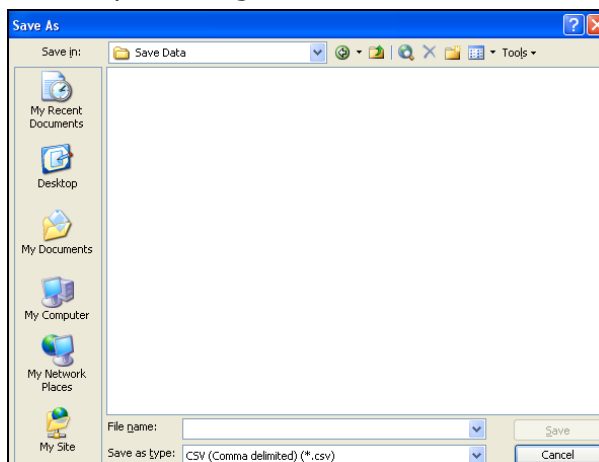
Do all of the following:

- Navigate to the location where you want to save the file.
 - In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, BlackShirt.csv
 - Click **Save**. The file is saved to the location you selected.
 - **Cancel** - To cancel your action, click **Cancel**.
- 3 Once the table is open, you can select rows and columns of GTIN data to copy. When you want to close the table, click the X in the upper right corner of the window.

If you modified the table, a dialog box appears when you close the window and asks if you want to save your changes.



To save your changes, click **Yes**. The Save As dialog box opens.



Do all of the following:

- Navigate to the location where you want to save the file.

- In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, BlackShirt.csv
- Click **Save**. The file is saved to the location you selected.

Viewing GTIN Details

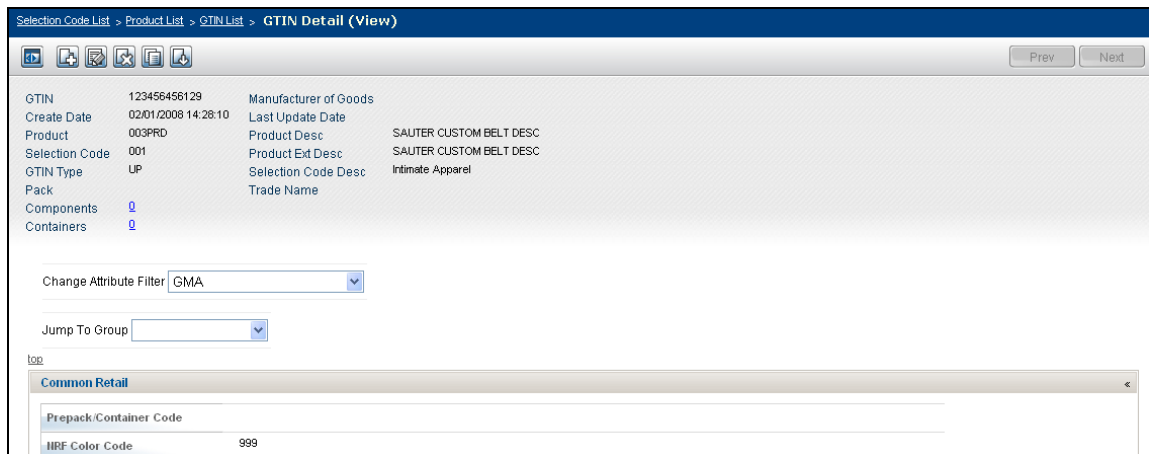
GTIN details are the attributes of the GTIN. Examples include color code and booking date. Only attributes in the selected attribute filter will be displayed.

To view a GTIN’s attributes

- 1 Find the GTIN:
 - See “Finding GTINs Across Selection Codes” on page 88.
 - See “Finding GTINs Under One Product” on page 90.

- 2 On the GTIN list page, click a GTIN’s hyperlink.

The GTIN Detail page opens displaying all attributes in the filter, both populated and unpopulated. Above the table is general information about the GTIN.



- 3 To find a specific attribute for the GTIN, do any of the following:
 - Use the scroll bar.
 - Above the table, in the **Jump to Group** drop-down list, select the Attribute Group that seems likely to contain the attribute (for example, Available Date is in the Ordering Information Attribute Group). The page resets to show that Attribute Group.
See “GTIN Attribute Groups” on page 69.
- 4 To view attributes for other GTINs in the list, do one of the following:
 - Click **Prev** to view the attributes for the previous GTIN in the list.
 - Click **Next** to view the attributes for the next GTIN. in the list
- 5 To view all of the components that belong to this GTIN, click the Components link in the header. The View Components popup lists all of the components that are part of the GTIN.

- 6 To view all of the containers that this component belongs to, click the Containers link in the header. The View Containers popup lists all of the containers for the GTIN.

Viewing Item Media

Item media includes image attribute information at the GTIN level, such as the image description and image filename, as well as any physical image.

To view Item media

- 1 Find the GTIN. See one of the following:
 - ["Finding GTINs Across Selection Codes" on page 88.](#)
 - ["Finding GTINs Under One Product" on page 90.](#)

The GTIN List page opens.

- 2 Click the image hyperlink (in the Image column) for the GTIN.

<input type="checkbox"/>			GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date
<input type="checkbox"/>			111111033006	UP		003	Silver	10031	31			02/07/12		
<input type="checkbox"/>			111111033136	UP		003	Silver3	10031	31			02/08/12		

The Item Media page opens.

The image attribute information displays. If a physical image has been uploaded, a watermarked image displays. If no physical image has been uploaded, a OpenText watermark displays.

Note: If you an download image, it will have a higher resolution and will not be watermarked. Downloading an image (or other data) is a billable action.

The screenshot shows the 'Item Media' page for a specific GTIN. It displays the following metadata:

- Company Name: KOBLES N BITS
- Account Number: 12510333555
- Selection Code: 012
- Description: 012 Images
- Product: IMACEPRO02
- Product Description: Image Product 2
- GTIN: 11111032649
- GTIN Type: UP
- Images: 1

Below the metadata, there is a section for 'Item Image' with the following details:

- File Name: myrdimageUPC.jpg
- File Type: JPG-JPEG
- Image Type: 5x-58 Shot
- Purpose: INT-Internet
- Orientation: PRO-Primary
- Location Type: FTP
- External Location: ftp://myname@host.dom/%2Fetc/hold
- File Size: 0
- Pixel Density (DPI): 0
- Height: 0
- Width: 0
- Image Style: PRO-Product
- Facing (GDSN): 7-Back
- Angle: 8-Left, Plunge angle present
- Clipping Path: ClipWide 12510333555Test1
- Image Description: 12510333555Test1 Descr

To the right of the metadata is a preview of the image, which is watermarked with 'PREVIEW'.

If there is additional GTIN media associated with this GTIN, you can view more image attribute information by using the scroll bar.

Finding Container GTINs for a Component GTIN

Container GTINs contain component GTINs and sometimes other container GTINs.

To find a container GTIN for a component GTIN

- 1 If you are on a GTIN List page, go to Step 2. Otherwise, find a GTIN by doing one of the following
 - See ["Finding GTINs Across Selection Codes"](#) on page 88.
 - See ["Finding GTINs Under One Product"](#) on page 90.

Note: You may find want to filter the GTIN list to display only **Not Containers**. See ["Filtering a GTIN List"](#) on page 92. In the Pack column, a GTIN that is sold only as a component is indicated by PP.

- 2 Click the hyperlink in the Containers column. The View Containers popup lists all of the containers for the selected GTIN.

View Containers							close
GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	
691751700532	UP	CA	000	NO COLOR	00000	NO SIZE	

The table lists from left for each container:

- **GTIN**—The container GTIN identifier as a hyperlink. Click the hyperlink to view GTIN details for the container. See ["Filtering a GTIN List"](#) on page 92.
- **GTIN Type**—The type of GTIN. See ["GTIN Number Structures"](#) on page 256.
- **Pack**—The container code indicator. See ["Container and Component GTIN Codes"](#) on page 258.
- **Color**—The GTIN's color information.
- **Color Description**—The GTIN's color description.
- **Size**—The GTIN's size information.
- **Size Description**—The GTIN's size description.

Finding Component GTINs for a Container GTIN

Component GTINs are contained in other GTINs called containers.

If you are on a GTIN details page, go to Step 2 of the following procedure.

To find component GTINs of a container GTIN

- 1 If you are on a GTIN List page, go to Step 2. Otherwise, find a GTIN by doing one of the following
 - See ["Finding GTINs Across Selection Codes"](#) on page 88.
 - See ["Finding GTINs Under One Product"](#) on page 90.

Note: You may find want to filter the GTIN list to display only **Containers**. See ["Filtering a GTIN List"](#) on page 92. In the Pack column, a container is indicated by any value except PP, which indicates component.

- Click the hyperlink in the Components column. The View Components popup lists all of the components that are part of the selected container.

<input type="checkbox"/>	GTIN	GTIN Type	Quantity	Pack	Unit of Measure	Color	Color Description	Size	Size Description
<input type="checkbox"/>	891751700488	UP	12		EA	600	RED	30108	8
<input type="checkbox"/>	891751700518	UP	15		EA	600	RED	30114	14
<input type="checkbox"/>	891751700501	UP	23		EA	600	RED	30112	12
<input type="checkbox"/>	891751700495	UP	32		EA	600	RED	30110	10
<input type="checkbox"/>	891751700525	UP	6		EA	600	RED	30116	16

The table displays from left for each component in the container:

- Check box for vendor to remove the component from the container (disabled for retailer).
- GTIN**—The component GTIN identifier as a hyperlink. Click the hyperlink to view GTIN details. See [“Filtering a GTIN List” on page 92](#).
- GTIN Type**—The type of GTIN. See [“GTIN Number Structures” on page 256](#).
- Quantity**—The quantity of the component in the container.
- Pack**—The component pack type (PP or blank).
- Unit of Measure**—The unit of measure for the quantity.
- Color**—The component GTIN’s color information.
- Color Description**—The component GTIN’s color description.
- Size**—The component GTIN’s size information.
- Size Description**—The component GTIN’s size description.

Setting Internet Explorer (IE) Options for Copy Data to Table

The Copy Data to Table option enables you to download data from the following pages to a table that opens in a pop-up window:

- Product List pages
- GTIN List pages
- Partner Access Report page
- Error Processing (document list) page

To allow data download and pop-up functionality for this option, you need to set the following Internet options for Internet Explorer (IE):

- Add the secure URL for Catalogue to your IE trusted sites.
- Enable IE to prompt for file downloads.
- If you are using a pop-up blocker, add the secure URL for Catalogue to your IE pop-up blocker settings.

The following procedure describes how to set all of these options.

To set Internet Explorer options for Copy Data to Table

1 Access the Internet with Internet Explorer.

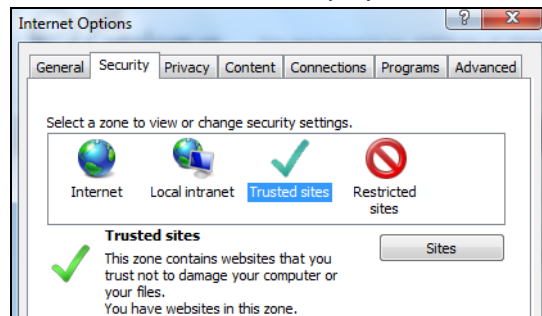
2 From the **Tools** menu, select **Internet Options**.

The Internet Options window opens.

3 Click the **Security** tab.

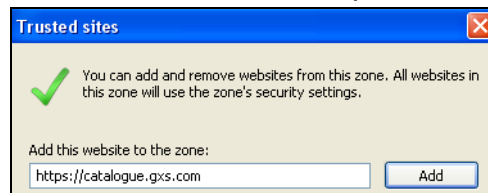
4 Under the **Select a zone to view or change security settings** section, click the **Trusted sites** icon.

The Trusted sites zone displays.



5 Click **Sites**.

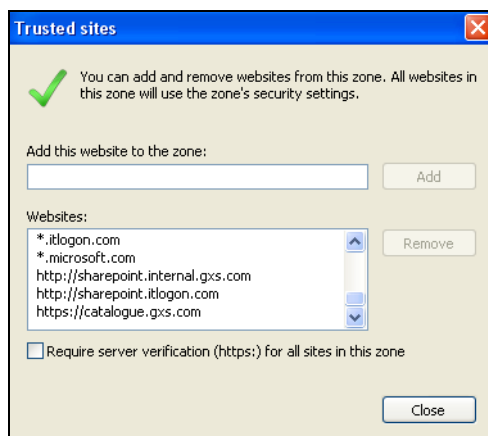
The Trusted sites window opens.



6 In the **Add this website to the zone** box, type the secure URL for Catalogue, **https://catalogue.gxs.com**.

7 Click **Add**.

The URL appears in the **Websites** box.

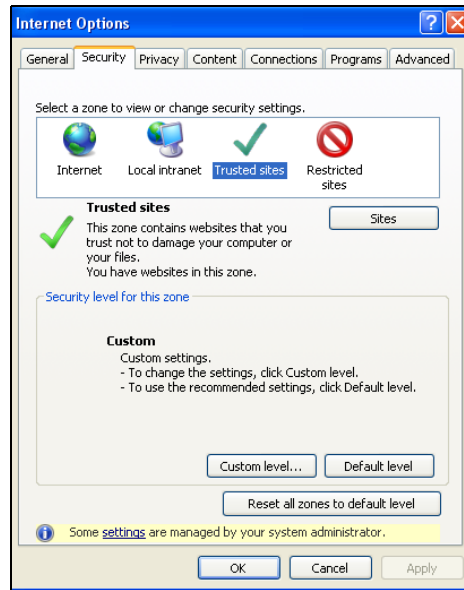


8 Click **Close**.

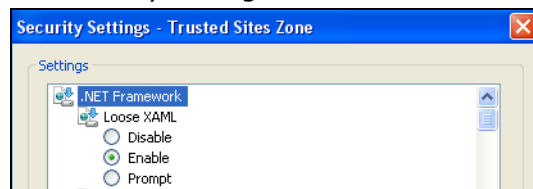
You return to the Internet Options window, **Security** tab.

9 If it is enabled, click **Apply** on the Internet Options window. If it is not enabled, continue to the next step.

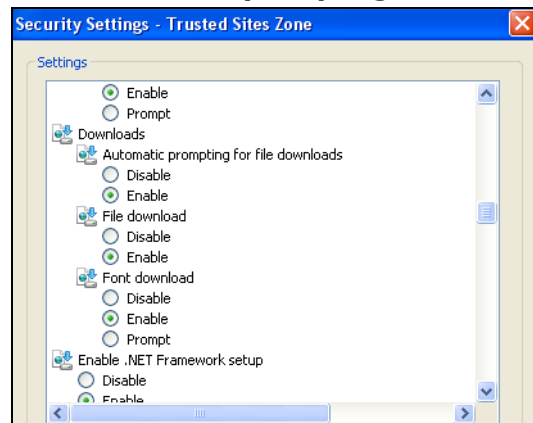
- 10 Under the **Security level for this zone** section, click **Custom level**.



The Security Settings - Trusted Sites Zone window opens.

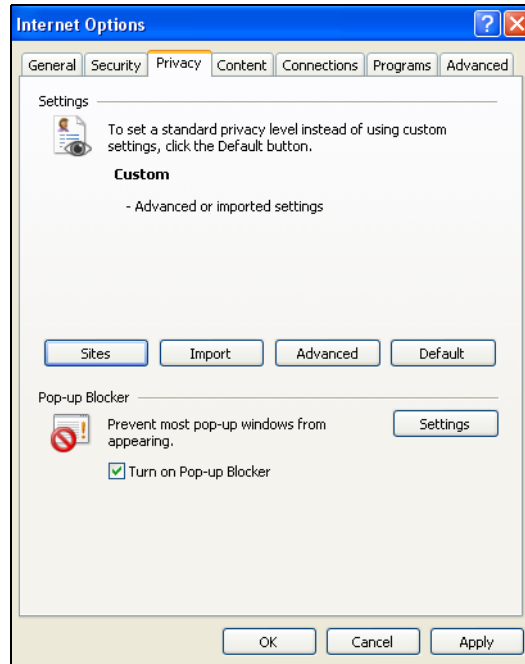


- 11 Scroll down to the **Downloads** section.
- 12 Under **Automatic prompting for file downloads**, select **Enable**.



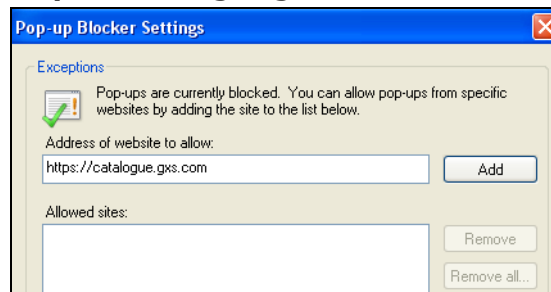
- 13 Click **OK** at the bottom of the Security Settings - Trusted Sites Zone window. A warning dialog box opens, asking you to verify that you want to change the settings for this zone.
- 14 Click **Yes**. You return to the Internet Options window.
- 15 If it is enabled, click **Apply** on the Internet Options window. If it is not enabled, continue to the next step.
- 16 Do one of the following:

- If you are not using a pop-up blocker, you are done. Click **OK**.
 You are now set up to use the Copy Data to Table feature.
 - If you are using a pop-up blocker, continue to the next step to add the secure URL for Catalogue to your IE pop-up blocker settings.
- 17** Click the **Privacy** tab.
- 18** In the **Pop-up Blocker** section at the bottom, click **Settings**.



The Pop-up Blocker Settings window opens.

- 19** In the **Address of website to allow** box, type the secure URL for Catalogue, **https://catalogue.gxs.com**, in the box.



- 20** Click **Add**.
 The URL appears in the **Allowed sites** box.
- 21** Click **Close** on the Pop-up Blocker Settings window.
 You return to the Internet Options window.
- 22** Click **OK** on the Internet Options window.
 You are now set up to use the Copy Data to Table feature.

Working with Color and Size Codes

7

The GS1 US[®] Color and Size Code System (formerly the National Retail Federation (NRF) Color and Size Code System) provides vendors and retailers with a standardized method of color and size identification of general merchandise and apparel (GM&A).

This system allows vendors and retailers to access, search, synchronize, request, and download the latest GS1 US color and size code information. This functionality is available to OpenText Active Catalogue vendors and retailers through Catalogue's Web User interface (UI). The color and size data from GS1 US is updated several times a day.

Refer to the following resources for additional information:

- For answers to frequently asked questions about color and size codes, please refer to the *OpenText Active Catalogue Color and Size Code FAQs* which can be found on the Product Documentation List page in Catalogue (click **Product Documentation > All Documents**).
- Although OpenText provides GS1 US color and size information on behalf of the GS1 US, you can also visit the GS1 US website to find more detailed information about GS1 US. The web address for GS1 US is www.gs1us.org.

This section explains how to find, view, and download the GS1 US color and size codes. In addition, it describes how to request a new size code via email.

This section is organized as follows:

- "Finding Color Codes" on page 104.
- "Filtering the Color Code List" on page 105.
- "Examples of Filtering Color Codes" on page 105
- "Downloading Color Codes" on page 107.
- "Finding Size Codes" on page 107.
- "Filtering the Size Code List" on page 108.
- "Examples of Filtering Size Codes" on page 109
- "Downloading Size Codes" on page 112.
- "Requesting a New Size Code from GS1 US" on page 113.
- "Importing a CSV text file to Excel" on page 115.
- "Commonly Used Color Description Abbreviations" on page 115.
- "National Retail Federation Color Code Ranges" on page 116.

- "GS1 US Product Category List" on page 117.
- "GS1 US Product Category2 List" on page 118.

Finding Color Codes

This section describes how to find an GS1 US color code.

To find a color code

- 1 Click **Color/Size Codes > Color Codes**. The Color Code List page opens.

<u>Color Code</u>	<u>Color</u>	<u>Color Group</u>
000	No Color	No Color
001	Black	Black Group
002	Oxford	Black Group
003	Oxford	Black Group

The table displays from left for each color code:

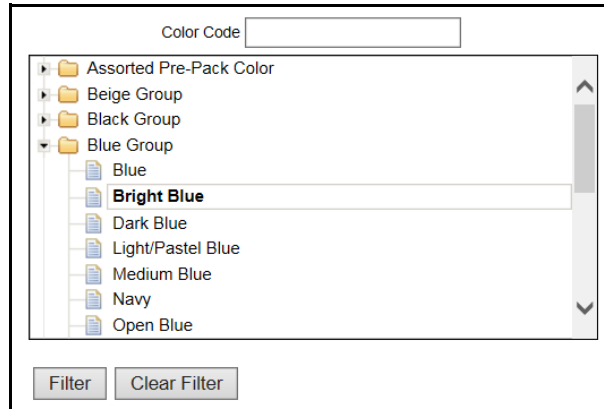
- **Color Code**—The GS1 US color code
 - **Color**—The GS1 US color
 - **Color Group**—The GS1 US color group
- 2 To locate a color code in the list, do any of the following:
 - Filter the color code list. See [“Filtering the Color Code List” on page 105](#).
 - Scroll down the list.
 - Use the browse buttons to move between pages.

Filtering the Color Code List

You can use a filter to display a list of color codes based on the criteria you specify.

To filter the color code list

- 1 On the Color Code List page, click **Filter**. The filter expands to display the filter options.



- 2 You can filter the list by selecting one of the following options:
 - **Color Code**—To show only a specific color code, type the full color code (leading zeros do not need to be typed) in the Color Code field.
 - **Color Group**—To show only a specific color group, select the color group from the list of color groups.
 - **Color**—To show only a specific color, click the arrow to the left of the color group that contains the color you want to display. The color group expands to display all of the colors in a particular group. Select a color from the list.
- 3 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Examples of Filtering Color Codes

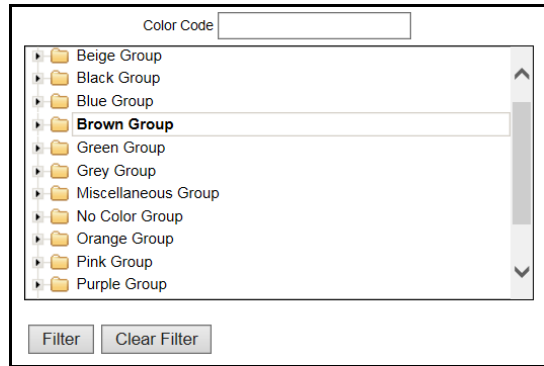
The following examples illustrate different ways to filter color codes:

- ["Example 1 - Color Codes for the Brown Group" on page 105](#)
- ["Example 2 - Color Codes for Rust/Copper" on page 106](#)

Example 1 - Color Codes for the Brown Group

- 1 On the Color Code List page, click **Filter**. The filter expands to display the filter options.

2 Click **Brown Group** to highlight the group.

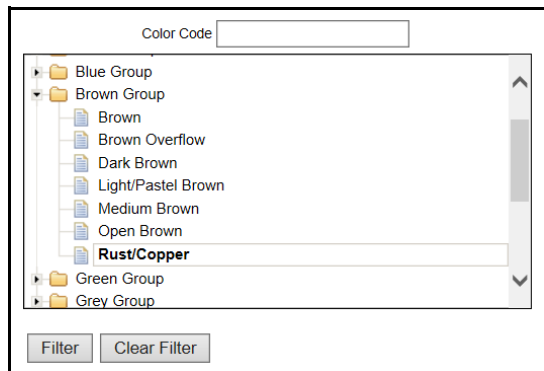


3 Click **Filter**. The list displays the colors in the Brown Group (a partial list is shown below).

Color Code	Color	Color Group
200	Brown	Brown Group
201	Dark Brown	Brown Group
202	Dark Brown	Brown Group
203	Dark Brown	Brown Group

Example 2 - Color Codes for Rust/Copper

- 1 On the Color Code List page, click **Filter**. The filter expands to display the filter options.
- 2 Click the arrow to the left of the Brown Group. The group expands to show all of the colors in this group which includes Rust/Copper.



3 Click **Rust/Copper** to highlight the group.

4 Click **Filter**. The list displays the colors Rust/Copper (a partial list is shown below).

Color Code	Color	Color Group
220	Rust/Copper	Brown Group
221	Rust/Copper	Brown Group
222	Rust/Copper	Brown Group
223	Rust/Copper	Brown Group

Downloading Color Codes

OpenText Active Catalogue allows you to download color code data directly to your desktop as a CSV (comma separated values) text file. See ["Importing a CSV text file to Excel" on page 115](#) for information about importing your file into Microsoft Excel so that leading zeros are displayed.

To download color codes

- 1 Filter the color code list to restrict it to only the color codes you want to download. See ["Filtering the Color Code List" on page 105](#).
- 2 Click **Download** to initiate the data download. The File Download dialog opens.
- 3 Do one of the following:
 - Click **Open** to view the file.
 - Click **Save** to save the file to your computer. The Save As dialog opens. Type a file name in the **File name** text box and click **Save**. The file is saved to your computer.
 - Click **Cancel** to cancel the download and return to the Color Code List page.

Finding Size Codes

This section describes how to find an GS1 US size code.

To find a size code

- 1 Click **Color/Size Codes > Size Codes**. The Size Code List page opens.

Size Code	Category	Category 2	Primary Size	Secondary Size	Heading	Heading 2	Type
00000	All	No Size Code	No Size	No Secondary Size			
10000	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	42			
10001	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Letter or Word	One Size Fits All				
10002	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	36	42			

The table displays from left for each size code:

- **Size Code**—The GS1 US size code
- **Category**—The product category description (the first level of product category description)
- **Category2**—The GS1 US table name description (the second level of product category description)
- **Primary Size**—The primary size description
- **Secondary Size**—The secondary size description
- **Heading**—The GS1 US Heading description (the third level of product category description)

- **Heading2**—The GS1 US Heading2 description (the fourth level of product category description)
 - **Type**—The size type. If the size code is European or US, it is indicated in this column.
- 2 To locate a size code in the list, do any of the following:
- Filter the size code list. See “Filtering the Size Code List” on page 108.
 - Scroll down the list.
 - Use the browse buttons to move between pages.

Filtering the Size Code List

You can use a filter to display a list of size codes based on the criteria you specify. Refer to “GS1 US Product Category List” on page 117 and the “GS1 US Product Category2 List” on page 118 to help you search for only those product categories you want to display.

To filter the size code list

- 1 On the Size Code List page, click **Filter**. The filter expands to display the filter options.

- 2 Filter the list by entering and/or selecting the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
- **Size Code**—To show only a specific size code, type the full size code.
 - **Category**—Tree view of Category, Category2, Heading, and Heading2 descriptions—To filter the list by a specific level of product category description, select one of the following description levels. To expand the tree and display subsequent levels, click the arrow to the left of each description.
 - **Category**—To filter the list by Category description, select a category description (first level).
 - **Category2**—To filter the list by Category2 description, expand a Category level and select a Category2 description (second level).

- **Heading**—To filter the list by Heading description, expand a Category2 level and select a Heading description (third level).
 - **Heading2**—To filter the list by Heading2 description, expand a Heading level and select a Heading2 description (fourth level).
 - **Primary Size**—To filter the list by the primary size description, type a partial or full primary description in the text box.

Note: The largest dimension of the description must be entered first. For example, filter the list for a 10x8 picture frame rather than an 8x10 inch picture frame. Sizes are in inches for US measurements and millimeters for metric measurements.
 - **Secondary Size**—To filter the list by the secondary size description, type a partial or full secondary description in the text box.
 - **Type**—To filter the list by a specific size type (European or US), type **E** or **U** in the text box.
 - **Add Date**—To filter the list by size codes that were added by GS1 US on or after a specific date, type a date (MM/DD/YYYY format) in the text box (or click **Auto Calendar** and select a date from the calendar).
- 3 Click **Filter**. The list that meets your criteria displays.
- Note:** To remove all filter criteria, click **Clear Filter**.

Examples of Filtering Size Codes

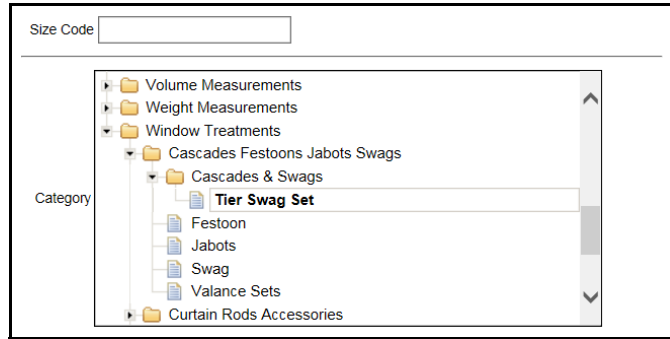
The following examples illustrate different ways to filter size codes:

- ["Example 1 - Size Codes for Tier Swag Set" on page 109](#)
- ["Example 2 - Size codes for Adult Male and Unisex Clothing" on page 110](#)
- ["Example 3 - Size Codes Using the % Wildcard Character" on page 111](#)

Example 1 - Size Codes for Tier Swag Set

- 1 On the Size Code List page, click **Filter**. The filter expands to display the filter options.
- 2 Click the arrow to the left of **Window Treatments**. The tree expands to show all of the second level descriptions beneath Window Treatments.
- 3 Click the arrow to the left of **Cascades Festoons, Jabots Swags**. The tree expands to show all of the third level descriptions beneath it.
- 4 Click the arrow to the left of **Cascades & Swags**. The tree expands to show all of the fourth level descriptions beneath it.

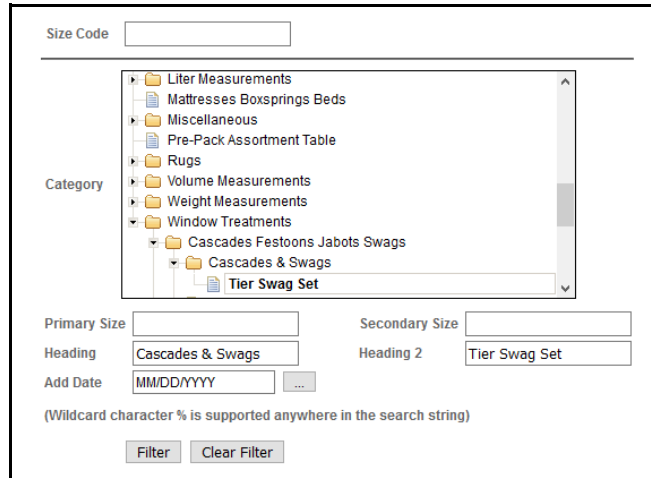
5 Click **Tier Swag Set** to highlight the category.



6 Click **Filter**. The list displays all size codes whose Heading2 description is Tier Swag Set (a partial list is shown below).

Size Code	Category	Category 2	Primary Size	Secondary Size	Heading	Heading 2	Type
82271	Window Treatments	Cascades Festoons Jabots Swags	54-82 Set	2 Wide Cascades & Swags	Cascades & Swags	Tier Swag Set	
82272	Window Treatments	Cascades Festoons Jabots Swags	54-82 Set	3 Wide Cascades & Swags	Cascades & Swags	Tier Swag Set	

Note: The filter now reflects your search criteria in the **Heading** and **Heading2** fields:



Example 2 - Size codes for Adult Male and Unisex Clothing

- 1 On the Size Code List page, click **Filter**. The filter expands to display the filter options.
- 2 In the **Category** field, click **Adult Male & Adult Unisex Clothing & Furnishings** to highlight the category.

3 In the **Primary Size** field, type **34**.

4 Click **Filter**. The list displays all size codes where Primary Size is 34 in the Adult Male and Adult Unisex category (a partial list is shown below).

Size Code △	Category	Category 2	Primary Size	Secondary Size	Heading	Heading 2	Type
10000	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	42			
10506	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	XShort			
10520	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34				
10521	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	Short			
10522	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	Average or Medium or Regular			
10523	Adult Male & Adult Unisex Clothing & Furnishings	Sizes Beginning With a Number	34	Long or Tall or Large			

Example 3 - Size Codes Using the % Wildcard Character

In this example, the wildcard character % is used in the Heading search string to locate size codes that contain the word bedskirts.

- 1 On the Size Code List page, click **Filter**. The filter expands to display the filter options. Do not highlight any name in the **Category** field.
- 2 In the **Heading** field, type **%bedskirt**.

3 Click **Filter**. The list displays all size codes where Heading contains the word bedskirt (a partial list is shown below).

Size Code	Category	Category 2	Primary Size	Secondary Size	Heading	Heading 2	Type
60701	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Twin Long Drop 17- 19 Inches	Ruffled Bedskirt	Long Drop	
60702	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Full Long Drop 17-19 Inches	Ruffled Bedskirt	Long Drop	
60703	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Queen Long Drop 17-19 Inches	Ruffled Bedskirt	Long Drop	
60704	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	King Long Drop 17-19 Inches	Ruffled Bedskirt	Long Drop	
60705	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	California King Long Drop 17-19 Inches	Ruffled Bedskirt		
60724	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Twin XLong Drop 20+ Inches	Ruffled Bedskirt	X Long Drop	
60725	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Full XLong Drop 20+ Inches	Ruffled Bedskirt	X Long Drop	
60726	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	Queen XLong Drop 20+ Inches	Ruffled Bedskirt	X Long Drop	
60727	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	King XLong Drop 20+ Inches	Ruffled Bedskirt	X Long Drop	
60728	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Ruffled	California King XLong Drop 20+ Inches	Ruffled Bedskirt	X Long Drop	
62139	Bed Bath Kitchen	Bedskirts Canopies	Bedskirt Tailored	Crib Regular Drop 13-16 Inches	Tailored Bedskirt	Regular Drop	

Downloading Size Codes

OpenText Active Catalogue allows you to download size code data directly to your desktop as a CSV (comma separated values) text file. See ["Importing a CSV text file to Excel" on page 115](#) for information about importing your file into Microsoft Excel so that leading zeros are displayed.

Note: You should restrict the number of size codes you download by filtering the list before you download the codes. See Step 1 in the following procedure.

To download size codes

- 1 Filter the size code list to restrict it to only the size codes you want to download. See ["Filtering the Size Code List" on page 108](#).
- 2 Click **Download** to initiate the data download. The File Download dialog opens.
- 3 Do one of the following:
 - Click **Open** to view the file.
 - Click **Save** to save the file to your computer. The Save As dialog opens. Type a file name in the **File name** text box and click **Save**. The file is saved to your computer.
 - Click **Cancel** to cancel the download and return to the Size Code List page.

Requesting a New Size Code from GS1 US

If you do not find the exact size code you want in the list of size codes on the Size Code List page, you can submit a request to GS1 US to add a new code.

Note: New color codes cannot be requested.

Use the procedure below to fill out the registration information and submit the request. The information is emailed to OpenText Cloud Support Services (CSS) for validation. After validation, OpenText forwards the request to GS1 US for consideration; you will be notified if a new code is created.

To request a new size code

- 1 Click **Color/Size Codes > Request New Size Code**. The Size Code Request page opens.
- 2 At the top of the page, enter the following information:

Contact Information	
Name:	<input type="text"/>
Title:	<input type="text"/>
Email Address:	<input type="text"/>
Phone:	<input type="text"/>
Fax:	<input type="text"/>
Company Name:	<input type="text"/>
Address:	<input type="text"/>
City/State Zip:	<input type="text"/>

- **Name**—Your name. Required.
- **Title**—Your title. Optional.
- **Email Address**—Your email address. Required.
- **Phone**—Your phone number. Required.
- **Fax**—Your fax number. Optional.
- **Company Name**—Your company’s name. Required.
- **Address**—Your company’s address. Required.
- **City/State Zip**—Your company’s city, state, and ZIP code. Required.

- 3 At the bottom of the page, fill in the following information for each size code you are requesting. You can request up to 10 new size codes each time you submit a request.

Table #	Product	First Size	Second Size

Explain requirements for code request:

Table #	Table Name
1	Adult Male & Unisex Clothing & Furnishings
2	Boys' & Unisex Students' Clothing & Furnishings
3	Juniors' Misses' & Women's Clothing & Furnishings
4	Infants' Toddlers' & Girls' Clothing
5	Footwear
6	Linens, Domestics & Related Textiles
7	Home Furnishings, China, Dinnerware & Accessories, Jewelry & Miscellaneous

The results of this completed form will be emailed to GS1 for consideration.

- **Table #**—For each size code you are requesting, determine the appropriate table name from the following list and type the corresponding table number for the new code in the Table # column. Required.
- **Product**—For each size code you are requesting, type the product category description (the first level of product category description). Required.
- **First Size**—For each size code you are requesting, type the first size description. The **First Size** corresponds to the **Primary** size that displays on the Size Code List page. Recommended.
- **Second Size**—For each size code you are requesting, type the second size description. The **Second Size** corresponds to the **Secondary** size that displays on the Size Code List page. Recommended.
- **Explain requirements for code request**—Type an explanation of why you need this new size code. Optional.

Note: If you need to clear the entries in the form and start over, click **Clear**.

- 4 If you are satisfied with your entries, print the form for your records before you submit it. From the File menu, select **Print**.
- 5 To submit your request, click **Send**. The information is emailed to OpenText Cloud Support Services (CSS) for validation. OpenText will forward it to GS1 US for consideration. You will be notified if a new code is created.

Note: Once you submit your request, the Size Code Request page remains open. The Name text box is cleared to prevent you from accidentally

resubmitting the same request. You can submit other size code requests, or select another option from the button bar.

Importing a CSV text file to Excel

You can import your CSV text file of GS1 US color or size codes to a Microsoft Excel spreadsheet. Use the following procedure to format the data to display the leading zeros for the codes.

To import a CSV text file of GS1 US color or size codes to Excel

- 1 Open a new, blank Excel document (workbook).
- 2 From the Data menu, select **Import External Data > Import Data**. The Select Data Source dialog box opens.
- 3 Browse to the CSV text file you want to import, and select it. Click **Open**. The Text Import Wizard - Step 1 of 3 opens.
- 4 Select **Delimited** as the file type that describes your data. Click **Next**. The Text Import Wizard - Step 2 of 3 opens.
- 5 Under Delimiters, select **Comma** as the only delimiter. Click **Next**. The Text Import Wizard - Step 3 of 3 opens.
- 6 Under Column data format, select **Text** as the column format for the column that contains the GS1 US color or size codes. Click **Finish**. The Import Data dialog box opens.
- 7 Select **New worksheet**. Click **OK**. The data is imported into the Excel spreadsheet and displays the GS1 US color or size code information, including the leading zeros for the codes.

Commonly Used Color Description Abbreviations

The following table lists commonly used color description abbreviations.

Color	Abbreviation
Black	BLK, BK
Charcoal	CHRCL
Dark Green	DK GREEN, DARK GRN
Medium Brown	MED BROWN, MEDIUM BRN
Light Blue	LT BLUE, LIGHT BU
Gray/Grey	GY
Silver	SLVR
White	WHT, WT
Natural	NTURAL
Blue/Natural	BLUE/NAT (using Blue color code)
Cream	CRM
Heather Gray	HTHR GREY, HEATHER GY
Brown	BRN, BR (if tritone, for example, BK/WT/BR)

Color	Abbreviation
Beige	BGE, BG
Green	GRN, GR
Green Combination	GRN COMBO
Blue	BL, BU
Navy	NAVY
Bright Blue	BRT BLUE
Turquoise	TURQ, TRQSE
Purple	PRPLE
Lavender	LVNDR
Red	RD
Pink	PNK
Yellow	YLW, YW, YL
Gold	GLD
Orange	ORGE
Midnight	MIDNT
Assorted	ASST (999)
Multicolor	MULTI (960)
Printed	PRNTD
Floral	FLRL
Rainbow	RAINBO, RNBW

National Retail Federation Color Code Ranges

The following table lists GS1 US color code ranges.

No Color	000	Purple	500
Black	001	Dark Purple	501-509
Oxford	002-009	Medium Purple	510-519
Charcoal	010-019	Bright Purple	520-529
Gray	020	Lt/Pastel Purple	530-539
Dark Gray	021-029	Open Purple	540-599
Medium Gray	030-039	Red	600
Silver	040-049	Dark Red	601-609
Lt/Pastel Grey	050-059	Medium Red	610-619
Open Grey	060-099	Bright Red	620-629
White	100	Lt/Pastel Red	630-639
Natural	101-109	Open Red	640-649
Open White	110-199	Pink	650
Brown	200	Dark Pink	651-659
Dark Brown	201-209	Medium Pink	660-669
Medium Brown	210-219	Bright Pink	670-679
Rust/Copper	220-229	Lt/Pastel Pink	680-689

No Color	000
Lt/Pastel Brown	230-239
Open Brown	240-249
Beige/Khaki	250
Dark Beige	251-259
Medium Beige	260-269
Light Beige	270-279
Open Beige	280-299
Green	300
Dark Green	301-309
Medium Green	310-319
Bright Green	320-329
Lt/Pastel Green	330-339
Open Green	340-399
Blue	400
Dark Blue	401-409
Navy	410-419
Medium Blue	420-429
Bright Blue	430-439
Turquoise/Aqua	440-449
Lt/Pastel Blue	450-459
Open Blue	460-499

Purple	500
Open Pink	690-699
Yellow	700
Dark Yellow	701-709
Gold	710-719
Medium Yellow	720-729
Bright Yellow	730-739
Lt/Pastel Yellow	740-749
Open Yellow	750-799
Orange	800
Dark Orange	801-809
Medium Orange	810-819
Bright Orange	820-829
Lt/Pastel Orange	830-839
Open Orange	840-899
Miscellaneous	
Brown Overflow	900-919
Beige Overflow	920-929
Red Overflow	930-949
Pink Overflow	950-959
Open Miscellaneous	960-998
Assorted Pre-Pack*	999

* See Table 9 in the *GS1 US Color and Size Code Guidelines* which can be found on the Product Documentation page (**Product Documentation > All Documents**)

GS1 US Product Category List

The following table lists all of the product categories for GS1 US size codes. You can use this list to set your filter criteria and narrow down the list of size codes that displays on the Size Code List page.

Adult Male & Adult Unisex Clothing & Furnishings
All
Bath Rugs Accessories
Bed Bath Kitchen
Boys' & Unisex Students' Clothing & Furnishings
China Dinnerware Accessories
Cookware
Drinkware
Flatware

Footwear Main Table
Furniture Slipcovers
Infants', Toddlers & Girl's Clothing
Jewelry
Juniors, Misses' & Women's Clothing & Furnishings
Linear Measurements
Liter Measurements
Mattresses Boxsprings Beds
Millimeter Measurements
Miscellaneous
Pre-Pack Assortment Table
Volume Measurements
Weight Measurements
Window Treatments

GS1 US Product Category2 List

The following table lists all of the second level product categories for GS1 US size codes. You can use this list to set your filter criteria and narrow down the list of size codes that displays on the Size Code List page.

Bakeware Sets	No Size Code
Bath Kitchen Towels Miscellaneous	Open Stock Service Accessory Pieces
Bath Rug Sets	Pillows Accessories
Bath Rug Sets with Lid	Priscillas Ruffled Applications
Bath Rugs	Protective Coverings
Bed Bath Accessories	Ring Sizes
Bed Pillows Pillowcases Shams	Rod Sleeves Shades Side Cascades Toppers
Bed Sheets Sheet Sets	Rug Set
Bedskirts Canopies	Servers
Bedspreads Duvets	Service Sets
Blankets Quilts	Shower Curtains Accessories
Bracelets Watches	Sizes Beginning With a Letter
Brazil Footwear Sizes	Sizes Beginning With a Letter or Word
Cascades Festoons Jabots Swags	Sizes Beginning With a Number
Comforters Feather Beds	Slipcovers
Cookware Sets	Spoons
Curtain Rods Accessories	Table Linens
Dinnerware Sets	Tank Set
European Footwear Sizes	Tiebacks
European Sizes Beginning With a Letter	Toilet Lid Covers
European Sizes Beginning With a Number	United Kingdom Footwear Sizes
Flatware Piece Sets	United States Customary Units

Forks	United States Footwear Sizes
Knives	United States Sizes Beginning With a Letter
Lined Curtains Drapes Panels Tiers	United States Sizes Beginning With a Letter or Word
Mastectomy Pads	United States Sizes Beginning With a Number
Metric System	Unlined Curtains Drapes Panels Tiers
Metric Units	US Customary and Metric Units
Miscellaneous	Valances Window Accessories
Mondopoint	

Working with Compliance Checks

8

A compliance check is a way to validate Catalogue data against a set of pre-determined rules. Compliance checks can be used to enforce industry standards and may be mandated by your trading partners.

This section describes the compliance checks that are available, explains how to enable the compliance checks, and discusses the options that are available if your data does not pass a compliance check.

For detailed information about the validation rules that apply to each compliance check, see the *OpenText Active Catalogue Attributes Guide*.

This section is organized as follows:

- [“About Compliance Checks” on page 120.](#)
- [“Email Notifications for Compliance Checks” on page 122.](#)

About Compliance Checks

OpenText Active Catalogue can perform several different compliance checks. The compliance checks that are available to your account are determined by your OpenText administrator. Some options may be grayed out, indicating that the compliance check is mandatory for your account.

When a compliance check is enabled, Catalogue verifies that an item meets the data requirements for a particular set of validation rules. If the data is non-compliant, you can decide whether Catalogue should reject the data.

The following compliance checks are available:

- **Item Maintenance Compatibility** — verifies that an item is compliant with specific rules, as follows:
 - Item identifiers of type EO are not allowed
 - 14-digit UK item identifiers must start with 0
 - Items with the following prepack types are not allowed: CA, DS, IP, MX, PL

Note: You cannot add a mock GTIN (used for Catalogue/Intelligent Web Forms (IWF) integration) if the Item Maintenance Compatibility compliance check is turned on.

- **GMA Compliance** — verifies that an item is compliant with GM&A (General Merchandise and Apparel) industry standards, as follows:

- Color code, Color Desc, Size Code and Size Desc must exist.
- If Color Code is 000 then Color Desc must be 'NO COLOR' and vice-versa.
- If Size Code is 00000 then Size Desc must be 'NO SIZE' and vice-versa.
- Prepack and Size Code check: Based on the prepack code/type, size code must be one of the following:
 - between 10000 and 89999 (or set to 00000 'NO SIZE')
 - at least 90000 (or set to 00000 'NO SIZE')
- Color code and Color Desc must be consistent within the Product.
- Size code and Size Desc must be consistent within the Product.
- Color and Size Codes can't be modified to different values when updating the item.
- Color Code, Size Code and GTIN Type must be unique.
- Size Code must be a valid GS1 US size code.
- **Prefix Validation** — verifies that an item's GTIN begins with a GS1 (UCC/EAN) company prefix (also called Manufacturer Block ID) that is associated with your account. *Not available to distributors.*

Vendors must contact Support to change the settings for Prefix Validation. This precaution prevents a vendor from turning off prefix validation which could result in the vendor inadvertently using another account's GTINs. See ["Contacting Technical Support" on page 5](#).

Note: Be aware of the following:

- If the Prefix Validation compliance check is turned on (both the "Enable compliance check" and "Reject non-compliant data" check boxes are selected) and a GTIN uses a GS1 company prefix that is not associated with your account, you cannot add or modify the GTIN (the prefix is part of the GTIN number).
- If the Prefix Validation compliance check is turned off, a GTIN using a GS1 company prefix that is not associated with your account can be added or modified (resulting in non-compliant data).

Note: Check your GS1 company prefixes to be sure that they are valid. OpenText does not recommend using invalid GS1 company prefixes, as it may result in chargebacks from some of your retailers.

To view your GS1 (UCC/EAN) company prefixes, go to **Account > Account Details** and click the **GS1 (UCC/EAN) Company Prefixes** tab.

- **Product Description Uniqueness** — verifies that an item's Product Description is unique across all products within your catalogue

Enabling Compliance Checks

Use this procedure to enable one or more compliance checks as well as choose whether or not to reject non-compliant data for each compliance check.

Note: Vendors must contact Support to change the settings for Prefix Validation. This precaution prevents a vendor from turning off prefix validation which could result in the vendor inadvertently using another account's GTINs. See ["Contacting Technical Support"](#) on page 5.

To enable compliance checks and/or reject non-compliant data

- 1 Click **Data Management > Compliance Checks**. The Compliance Checks page opens.

The screenshot shows the 'Compliance Checks' page. It features a blue header with the text 'Compliance Checks'. Below the header is a search bar with a magnifying glass icon. The main content area is divided into four sections, each with a blue header and two checkboxes: 'Item Maintenance Compatibility', 'GMA Compliance', 'Prefix Validation', and 'Product Description Uniqueness'. Each section has 'Enable compliance check' and 'Reject non-compliant data' checkboxes, both of which are checked.

- 2 Select one or more of the following check boxes under each compliance check that you want Catalogue to perform:

- **Enable compliance check** — Enables the compliance check so that Catalogue performs validation of your data. If the check box is already checked and is grayed out, this compliance check is mandatory for your account. It can only be changed by your OpenText administrator.
- **Reject non-compliant data** — If an item does not pass a compliance check, you can decide if the item should be rejected (the data will not be entered into the Catalogue database).

If this check box is selected, data changes received by the batch interface will go to error processing, and you are notified by email (see ["Email Notifications for Compliance Checks"](#) on page 122). Changes made through the user interface (UI) are reported directly through the UI.

- 3 Click **Save**. Your options are saved.

Email Notifications for Compliance Checks

For EDI documents, you are notified by email when an item fails to meet the data requirements of a compliance check. You must have the **Reject non-compliant**

data check box selected to receive emails. See ["Enabling Compliance Checks"](#) on page 122.

Catalogue sends you a summary email for each EDI document that contains errors. The email is sent to the primary contact email address for your account (**Account > Account Details**). Be sure that this email address is valid.

The email includes a hyperlink to the browser interface where you can troubleshoot the errors.

The email can be recognized by its subject line:

"OpenText Active Catalogue error report (control number: *DocumentControlNumber*)"

See the example below. The email includes the number of qXML functions (translated from EDI) that were rejected and a summary of the errors.

Example

Subject: OpenText Active Catalogue error report (control number: *DocumentControlNumber*)

One or more errors occurred while processing your input file. Please login to the OpenText Active Catalogue User Interface to review and manage these errors.

(<https://catalogue.gxs.com>)

Control number: *DocumentControlNumber*

Date: May 6, 2007

Time: 5:27:38 AM

Number of errors: 360

Error	Count	Description
-20505	23	Failed to get existing item attributes; error code=-20505
-20505	15	Item Number not found
-20511	3	Duplicate item number302
-90034	1	Item number already exists
-20510	318	Specified Selection Code or Product not found. It may have been deleted by another user.

You can use Error Processing in the browser interface to view and manage errors. For more information, see [Chapter 14, "Online Correction of Errors,"](#) on page 235.

This section explains how to maintain your product catalogue. Topics include adding, updating, and deleting Selection Codes, Products, and GTINs and the descriptive attributes for each, as well as image attributes and physical images. The section includes validation requirements for GTIN attributes and GTIN containers and components.

This section is organized as follows:

- [“Special Character Encoding Guidelines” on page 125](#)
- [“Adding Selection Codes” on page 126](#)
- [“Editing Selection Code Descriptions” on page 127](#)
- [“Deleting Selection Codes” on page 128.](#)
- [“Adding Products” on page 128.](#)
- [“Editing Product Details” on page 130](#)
- [“Adding and Editing Custom Field Values for a Product” on page 131](#)
- [“Moving a Product to a Different Selection Code” on page 133](#)
- [“Deleting Products” on page 134](#)
- [“Adding Image Attributes to a Product” on page 135](#)
- [“Adding \(Uploading\) Physical Images to a Product” on page 139](#)
- [“Updating Product Image Attributes” on page 140](#)
- [“Updating Product Physical Images” on page 143](#)
- [“Deleting Image Attributes from a Product” on page 143](#)
- [“Deleting Physical Images from a Product” on page 144](#)
- [“Adding GTINs” on page 145](#)
- [“Adding GTINs By Copying and Modifying an Existing GTIN” on page 147](#)
- [“Editing GTINs” on page 148](#)
- [“Editing Multiple GTINs under a Product” on page 149](#)
- [“Deleting GTINs” on page 150](#)
- [“Adding Image Attributes to a GTIN” on page 151](#)
- [“Adding \(Uploading\) Physical Images to a GTIN” on page 154](#)
- [“Updating GTIN Image Attributes” on page 155](#)
- [“Updating GTIN Physical Images” on page 158](#)
- [“Deleting Image Attributes from a GTIN” on page 158](#)

- “Deleting Physical Images from a GTIN” on page 159
- “GTIN Validation” on page 160
- “GTIN Validation” on page 160
- “Maintaining Container and Component GTINs” on page 161
- “Working with Attributes” on page 163.

Note: If you change any information at the Selection Code, Product, or GTIN level, and you have other information at these levels that contains an asterisk, you must update that information by removing the asterisk before the system will allow you to save your changes. The following characters should not appear in any data loaded to OpenText Active Catalogue > ^ ` [] * ~

Special Character Encoding Guidelines

Generally, issues with special characters stem from character encoding mismatches. Active Catalogue uses the Windows-1252 (Cp1252) character encoding. This is similar to ISO-8859-1, and the two special characters supported by Active Catalogue, the copyright character and the registered trademark character, are mapped identically between the two encodings.

Depending on the interface you use, use the one of the following methods to ensure that special characters are handled properly:

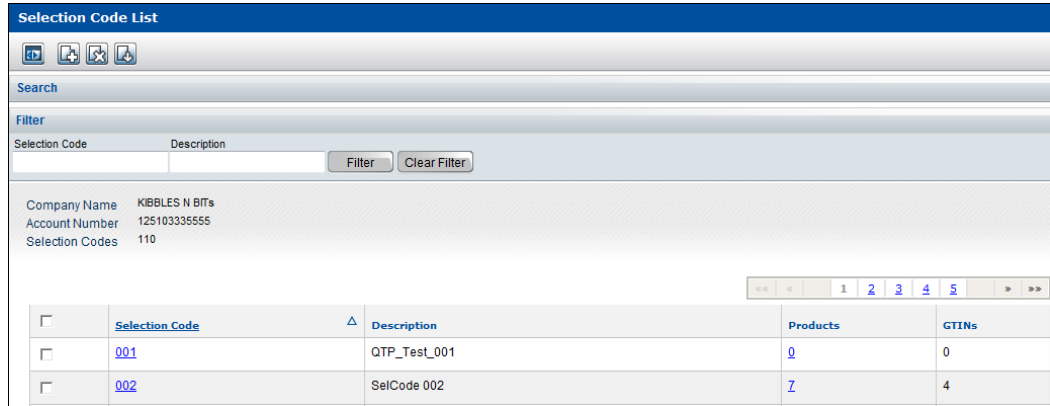
- Preferred method. Use a text editor with a Character Map tool and select the ISO-8859-1 encoding. Most modern text editors have Character Map tools that allow you to change the encoding and copy the desired special character to the clipboard. The special character can then be pasted into a field in the UI or pasted into the file for subsequent loading via text file upload.
- When generating EDI or Web Services requests for submission to Catalogue, the mechanism used to create the file must use ISO-8859-1 encoding.

Adding Selection Codes

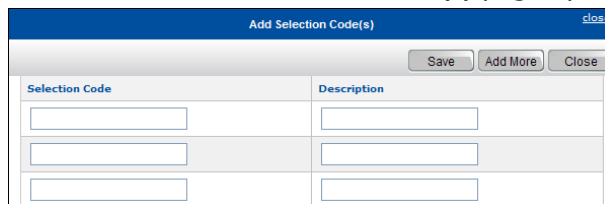
Selection Codes are the top level of your product organization system.

To add selection codes

1 Click **Catalogue > Selection Code List**. The Selection Code List page opens.



2 Click **Add**. The Add Selection Code(s) page opens.



3 For each new Selection Code, enter a new, 3-digit **Selection Code** in the first column.

4 Optional, but recommended. Enter Selection Code **Description** up to 25 characters.

Note: The following characters should not appear in any data loaded into OpenText Active Catalogue > ^ ` [] * ~

5 Do one of the following:

- To save the Selection Codes, and return to the Selection Code List page, click **Save**.
- To save the Selection Codes you have entered and remain on the Add Selection Code(s) page with additional blank fields for adding more Selection Codes, click **Add More** and repeat the procedure from Step 3.

6 Click **Save** to save the Selection Codes.

7 Click **Close** to return to the Selection Code List page.

Editing Selection Code Descriptions

A Selection Code description is recommended but not required.

To edit a Selection Code description

- 1 Find the Selection Code. See "Finding Selection Codes" on page 77. The Selection Code List page opens.

Selection Code	Description	Products	GTINs
001	QTP_Test_001	0	0
002	SelCode 002	7	4

- 2 Click the Selection Code's hyperlink (the 3-digit number in the Selection Code column). The Selection Code Details popup opens.

Selection Code	001
Description	Intimate Apparel
Products	9
GTINs	23
Catalogue Last Update	10/03/2007 14:53:29

- 3 Type the new description in the **Description** field (maximum of 25 characters), then click **Save**.

Note: The following characters should not appear in any data loaded to OpenText Active Catalogue > ^ ` [] * ~

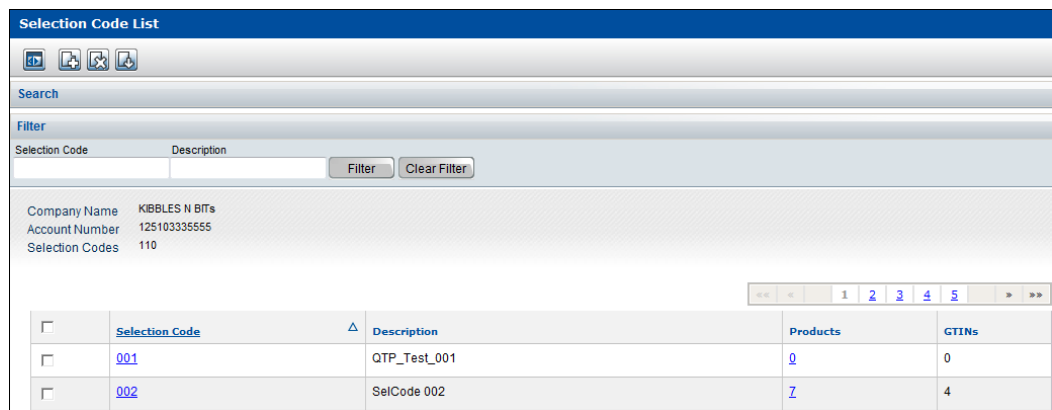
- 4 To close the popup, click **close** at the top right corner.

Deleting Selection Codes

If you delete a Selection Code, the Selection Code, all Products (including all Product images) and all GTINs (including all GTIN images) under the Selection Code will also be deleted.

To delete a Selection Code

- 1 Find the Selection Code. See "Finding Selection Codes" on page 77. The Selection Code List page opens.



- 2 Select the check box to the left of the Selection Code you want to delete.
- 3 Click **Delete**. A message asks if you if you want to proceed with deletion of the Selection Code.
- 4 Do one of the following:
 - To delete the Selection Code, click **OK**. A message confirms the deletion or reports an error.
 - To cancel the deletion, click **Cancel**.

Adding Products

To add a Product, you must know the Selection Code above the Product.

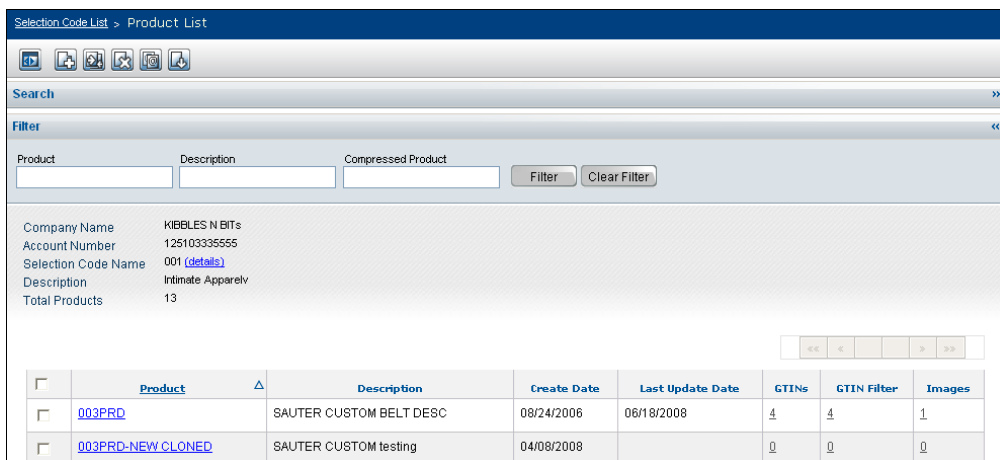
To add a Product

- 1 Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.
- 2 Select **Selection Code**, type the full **Selection Code** that will contain the new Product(s), and select **EQUAL** from the drop-down list.
- 3 Click **Search**.

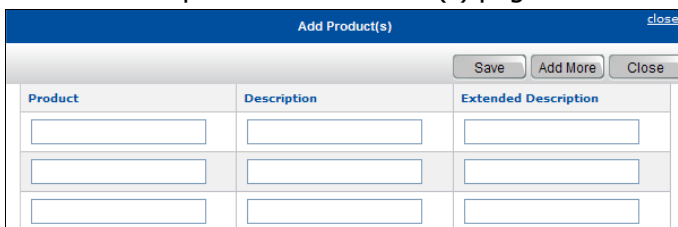
One of the following occurs:

- The Product List page opens listing current Products under the Selection Code. Go to the next step.
- If no Products have ever existed for this Selection Code, the Selection Code List page opens. Click the Product's hyperlink (in the Products column). In this case, the hyperlink will be a zero (meaning that zero Products currently exist under this Selection Code). The Add Product(s) page opens. Go to Step 5.

- If a Product has been added to and deleted from this Selection Code, and no Products currently exist, the Add Product(s) page opens. Go to Step 5.



4 Click **Add** to open the Add Product(s) page.



5 For each new Product under the Selection Code, enter:

- Required. **Product**—The Product identifier (maximum of 20 characters)

Note: Do not use any of the following in a **Product** identifier:

- Leading spaces
- Illegal characters > ^ ` [] * ~
- Special characters ! @ # \$ % & * () _ / |

Product identifiers are stored and exported in upper case, even if you load the Product in lower or mixed case.

- Required. **Description**—The description of the Product (maximum of 25 characters)
- Optional. **Extended Description**—The extended description of the Product (maximum of 40 characters)

Note: When using the UI, you can only add foreign language product description or product extended description by modifying an existing product. See "Editing Product Details" on page 130.

6 Do one of the following:

- To save the Products, and return to the Product List page, click **Save**.
- To save the Products you have entered and remain on the Add Product(s) page with additional blank fields for adding more Products to the Selection Code, click **Add More** and repeat the procedure from Step 5.

7 Click **Save** to save the Products.

8 Click **Close** to return to the Product List page.

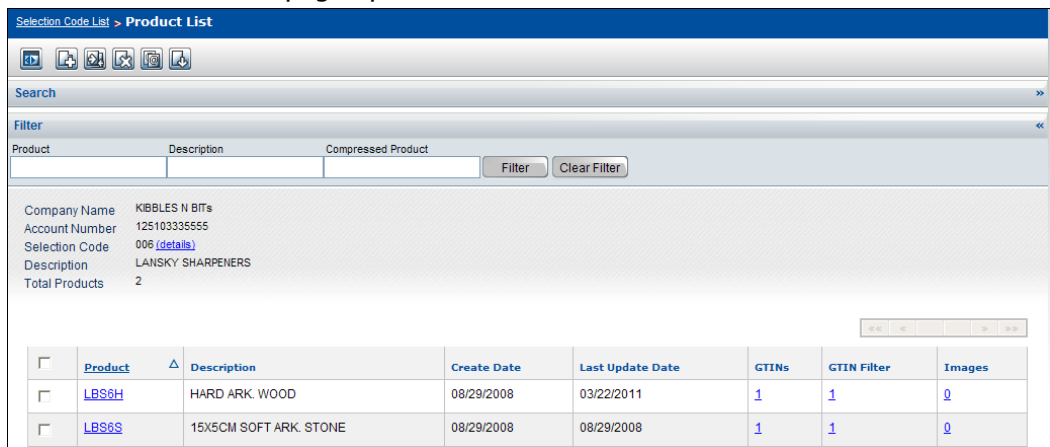
Editing Product Details

You can edit the Product description and Product extended description, but not the Product identifier (Name).

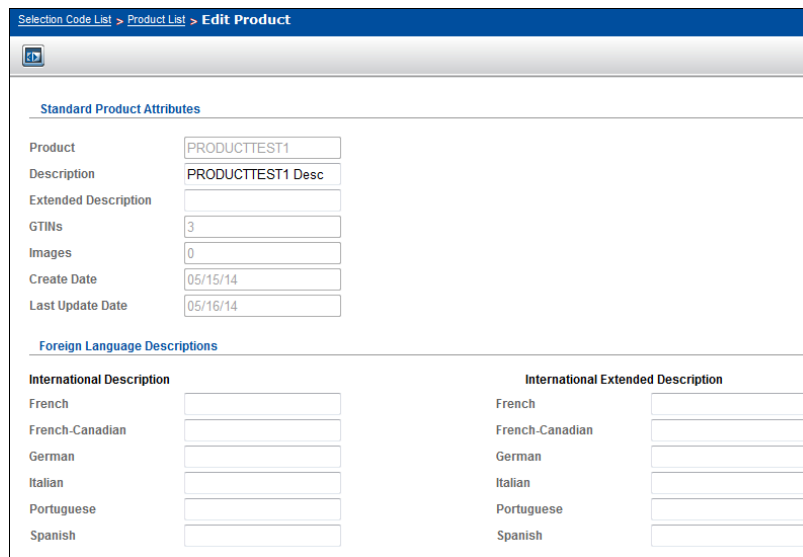
To edit Product details

- 1** Find the Product to edit:
 - See “Finding Products Across Selection Codes” on page 80.
 - See “Finding Products Under One Selection Code” on page 82.

The Product List page opens.



2 Click the Product’s hyperlink (in the Product column). The Edit Product page opens.



3 In the Standard Product Attributes section, at the top of the page, type your edits in the **Description** (maximum of 25 characters) and/or **Extended Description** (maximum of 40 characters) fields.

Note: Do not use any of the following illegal characters > ^ ` [] * ~

4 Optional. In the Foreign Language Descriptions section, to add foreign language product descriptions, type your descriptions (maximum of 25 characters) and/or extended descriptions (maximum of 40 characters) for the languages shown, in the appropriate fields. You do not need to specify an international description in order to specify an international extended description; you can provide one description without the other.

Note: Do not use any of the following illegal characters > ^ ` [] * ~

5 Click **Save**.

Adding and Editing Custom Field Values for a Product

Catalogue supports account-specific custom fields (attributes) at the Product level, thereby allowing Intelligent Web Forms (IWF) integration with Catalogue.

The vendor must first add the custom fields (called custom field definitions) using the browser user interface (UI). Once the custom fields have been added, they can be populated with values by either the vendor (using the UI, an EDI 888 document, or web services) or the retailer (using the UI or web services).

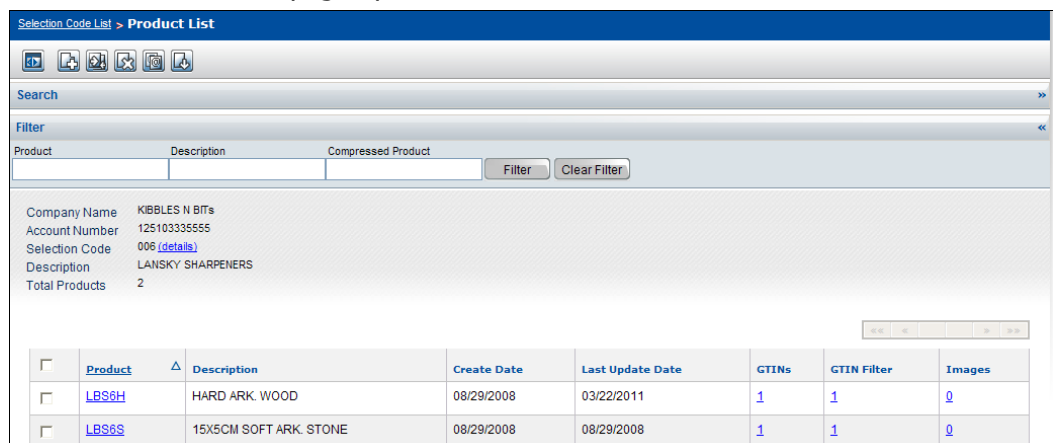
Note: Once a vendor defines a custom field, the field is available to be populated by *all* retailers who have access to a particular Product in that vendor’s catalogue.

See “Adding a Custom Field Definition” on page 60 for details on how to add a custom field definition.

To add or edit custom field values for a Product

- 1 Find the Product to edit:
 - See “Finding Products Across Selection Codes” on page 80.
 - See “Finding Products Under One Selection Code” on page 82.

The Product List page opens.



- Click the Product’s hyperlink (in the Product column). The Edit Product page opens.

The screenshot shows the 'Edit Product' page with the following sections:

- Standard Product Attributes:**
 - Product: PRODUCTTEST1
 - Description: PRODUCTTEST1 Desc
 - Extended Description: [Empty]
 - GTINs: 3
 - Images: 0
 - Create Date: 05/15/14
 - Last Update Date: 05/16/14
- Foreign Language Descriptions:**
 - International Description:**
 - French: [Empty]
 - French-Canadian: [Empty]
 - German: [Empty]
 - Italian: [Empty]
 - Portuguese: [Empty]
 - Spanish: [Empty]
 - International Extended Description:**
 - French: [Empty]
 - French-Canadian: [Empty]
 - German: [Empty]
 - Italian: [Empty]
 - Portuguese: [Empty]
 - Spanish: [Empty]
- Account-specific Custom Field Values:**
 - Account Name: KIBBLES N BITS - (125103335555) Fields Present
 - Table of Custom Fields:

Field Name	Field Label	Field Type	Value
Brian_test	Brian test	CHAR(12)	9983543
CustomFieldOne	Custom Field One	CHAR(50)	67765
CustomFieldTwo	Custom Field Two	CHAR(60)	[Empty]
RetailerSpecificPID	G3902-CB-G3903	CHAR(50)	[Empty]

Note: If custom fields have not been defined for any Products in this account, the Account-specific Custom Field Values section, at the bottom of the page, does not display.

- In the Account-specific Custom Field Values section, in the **Account Name** text box, type the name of the account whose custom field values you want to edit.

As you type the account name, a drop-down list appears and auto-fills with account names that match the characters you are typing. The more characters you type, the closer the match, and the less items that appear in the drop-down list.

Select an account name from this list.

Note: To further narrow the list, you can select the **Fields Present** check box; the list will display only those accounts that have at least one custom field value populating a custom field.

- For each custom field for the selected account name, type a value in the corresponding **Value** field. If a custom field supports multiline values, a **More** link displays. Once you have entered a value for the first custom field value, click **More** to display the field for the next custom field value. Repeat this process to add additional custom field values.

Note: Do not use any of the following illegal characters > ^ ` [] * ~

- Click **Save** to save the values. The new values are saved for the selected account.
- Repeat Steps 3-5, as needed, to assign custom field values for other accounts.

Moving a Product to a Different Selection Code

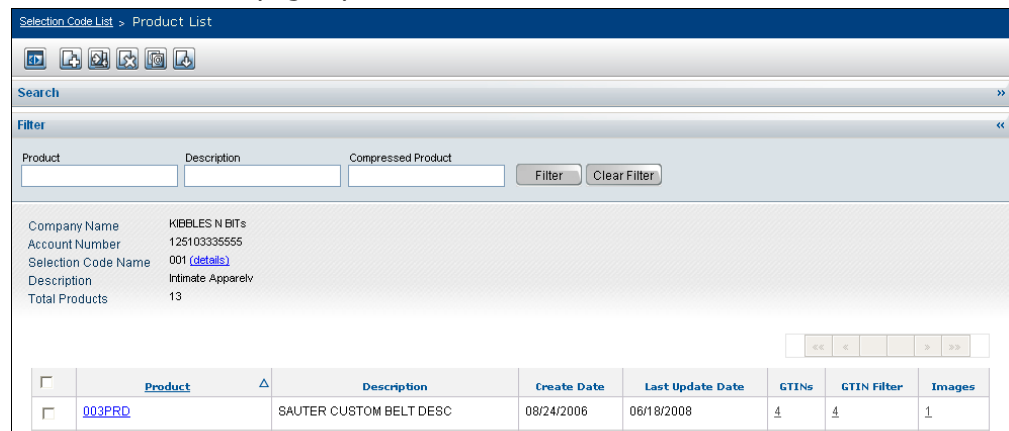
OpenText Active Catalogue can move a Product and all of its GTINs and associated attributes to a Selection Code that you specify.

Note: Traditionally, vendors used the Product Move function to hide or expose a Product to particular retailers by placing a Product under a Selection Code with the appropriate access (Restricted or Unrestricted). The Catalogue now supports Product-level access which allows a vendor to restrict a retailer's access to individual Products. See [Chapter 3, "Working With Access Rights,"](#) on page 38.

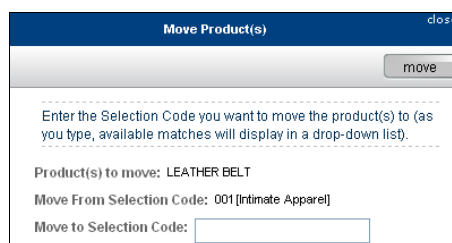
To move a Product

- 1 Find the Product to move:
 - See ["Finding Products Across Selection Codes"](#) on page 80.
 - See ["Finding Products Under One Selection Code"](#) on page 82.

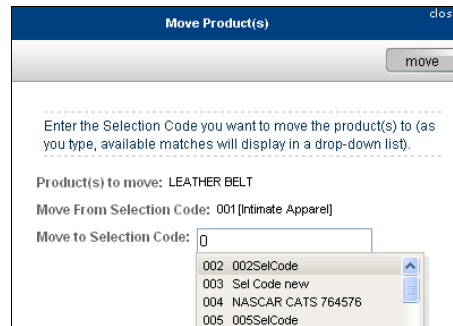
The Product List page opens.



- 2 Click the Product's hyperlink (in the Product column).
- 3 On a Product List page, select the check box next to the Product you want to move and click **Move**. The Move Product(s) popup opens.



- 4 Type the Selection Code you want to move the Product to. As you type, available Selection Code matches and their corresponding descriptions display in the drop-down list.



- 5 Select a value from the drop-down list.
- 6 Click **Move**.

OpenText Active Catalogue moves the Product and all of its GTINs and associated attributes to the specified Selection Code. It does not change attribute data other than Selection Code data. A message indicates that the Product was moved successfully.

Retailers who do not have access to the Selection Code under which the Product moves will not be able to export the data until they are granted access.

Note: Moving a Product in this way does not impact UCCnet registration of the Product.

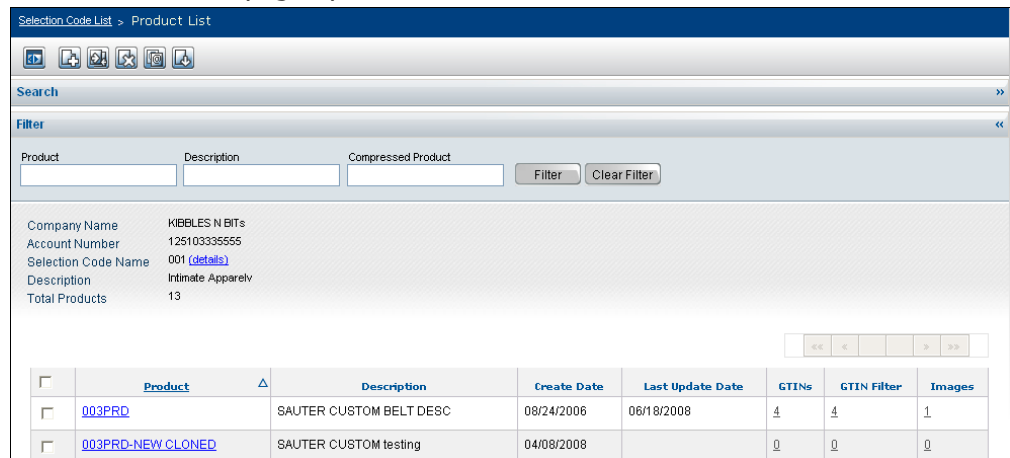
Deleting Products

If you delete a Product, the Product (including all Product images) and all GTINs under the Product (including all GTIN images) will be deleted.

To delete a Product

- 1 Find the Product:
 - See ["Finding Products Across Selection Codes"](#) on page 80.
 - See ["Finding Products Under One Selection Code"](#) on page 82.

The Product List page opens.



- 2 Select the check box to the left of the Product you want to delete.
- 3 Click **Delete**. A message asks if you want to proceed with deletion of the Product.
- 4 Do one of the following:
 - To delete the Product, click **OK**. A message confirms the deletion or reports an error.
 - To cancel the deletion, click **Cancel**.

Adding Image Attributes to a Product

A set of image attributes can be added to a Product. An attribute set represents a single image and must be added for every image you want to add to the Product. The file name must be unique for each attribute set within a Product.

Once a set of image attributes has been added, you can add (upload) a physical image that is associated with that set of attributes. Multiple attribute sets (and physical images) can be added for each Product.

Color Code - Optional

If the image has a color code associated with it, you have the option to add the image at the Product level or at the Product + Color Code level. There are separate icons on the Product Media page for adding an image at each of these levels.

After the attribute set is added, you cannot change the level at which you have added the image.

To add image attributes to a Product

- 1 Find the Product you want to add the image attributes to.
 - See "Finding Products Across Selection Codes" on page 80.
 - See "Finding Products Under One Selection Code" on page 82.

The Product List page opens.

2 Click the image hyperlink (in the Image column) for the Product.

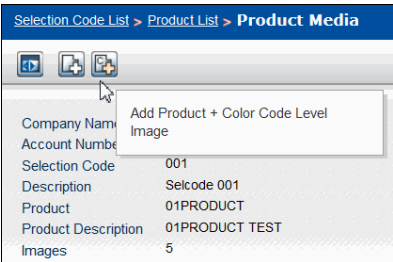
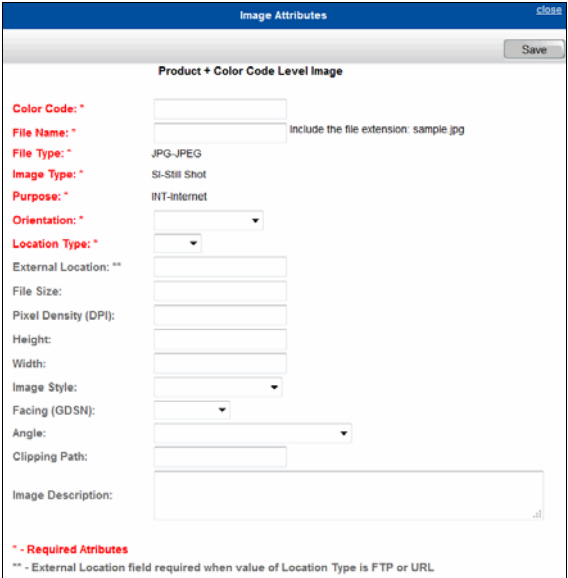
<input type="checkbox"/>	Product	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	PRODUCT0021	PRODUCT0021	05/22/13	08/07/13	9	9	0
<input type="checkbox"/>	PRODUCT009	PRODUCT009	05/31/13	05/31/13	1	1	0

The Product Media page opens. Note that there are two add icons, one for adding the image at the Product level and one for adding the image at the Product + Color Code level.



3 Do one of the following:

To add a...	Do this:
Product level image	<p>1 From the Product Media page, click Add Product Level Image.</p> <p>The Product Level Image Attributes popup opens.</p>

To add a...	Do this:
Product + Color Code level image	<p>1 From the Product Media page, click Add Product + Color Code Level Image.</p>  <p>The Product + Color Code Level Image Attributes popup opens.</p> 

4 Use the attribute fields and/or drop-down lists to add the attribute values of the image.

The required attributes are highlighted in red with a red asterisk.

- **Color Code**—Required only for Product + Color Code Level image. Cannot be changed once attribute set is added.
- **File Name**—Required. The file name of the attribute set. The name must be unique for each attribute set within a Product. Cannot be changed once attribute set is added.

Note: You must include the file extension; for example, sample.jpg. Do not use any of the following illegal characters < > ^ : & ? \ / | + %
- **File Type**—Required. The type of file. Value must be JPG (JPEG).
- **Image Type**—Required. The type of image. Value must be SI (Still Shot).
- **Purpose**—Required. The intended use of the image. Value must be INT (internet).
- **Orientation**—Required. The orientation of the image:

- PRI - Primary
- SDL - Side Left
- SDR - Side Right
- VF1 - Front
- VIB - Bottom
- VIK - Back
- VIS - Side
- VIT - Top
- **Location Type**—Required. The location type for the image:
 - ACL - Application Transaction Reference Number
 - FTP - File Transfer Protocol
 - LMI - Local Media Identifier
 - URL - Uniform Resource Locator
- **External Location**—Required only when value of Location Type is FTP or URL. The location of the image.
- **File Size**—Optional. The size of the file.
- **Pixel Density (DPI)**—Optional. Pixel density (DPI) for image.
- **Height**—Optional. The image pixel height.
- **Width**—Optional. The image pixel width.
- **Image Style**—Optional. The image style:
 - CSW - Color swatch
 - PRO - Product
- **Facing (GDSN)**—Optional. The direction from which the image is viewed:
 - 1 - Front
 - 2 - Left
 - 3 - Top
 - 7 - Back
 - 8 - Right
 - 9 - Bottom
- **Angle**—Optional. The horizontal direction of the image:
 - 1 - Center, No plunge angle
 - 2 - Left, No plunge angle
 - 3 - Right, No plunge angle
 - 7 - Center, Plunge angle present
 - 8 - Left, Plunge angle present
 - 9 - Right, Plunge angle present

- **Clipping Path**—Optional. The name of a path defined in the image itself that defines the outline of the subject of the image.
- **Image Description**—Optional. The description of the image.

5 Click **Save**.

The image attribute set has been added to the Product.

To add a physical image to the Product, see [“Adding \(Uploading\) Physical Images to a Product” on page 139](#).

Adding (Uploading) Physical Images to a Product

After a set of image attributes has been added to a Product (see [“Adding Image Attributes to a Product” on page 135](#)), you can add (upload) a physical image that is associated with that set of attributes. Multiple attribute sets (and physical images) can be added for each Product.

Note: Image file type must be JPEG with the level of compression at 10 or above. Image size is limited to 500 KB per image. There is a limit of 50,000 images per account.

Uploading an image replaces the current image, if one already exists. You do not need to delete an image before uploading a new one. Therefore, you can also use the following procedure to update an existing image.

To add (upload) a physical image to a Product

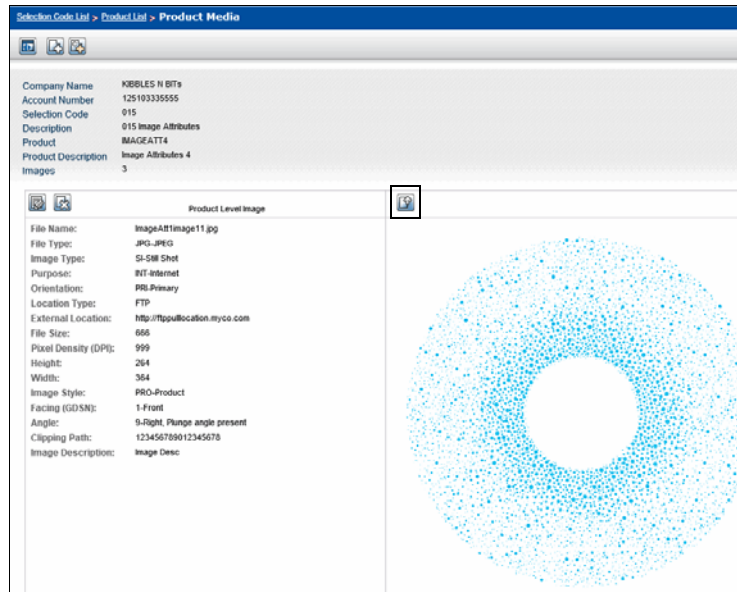
- 1** Find the Product you want to add the physical image to.
 - See [“Finding Products Across Selection Codes” on page 80](#).
 - See [“Finding Products Under One Selection Code” on page 82](#).

The Product List page opens.

- 2** Click the image hyperlink (in the Image column) for the Product you want to add the image to.

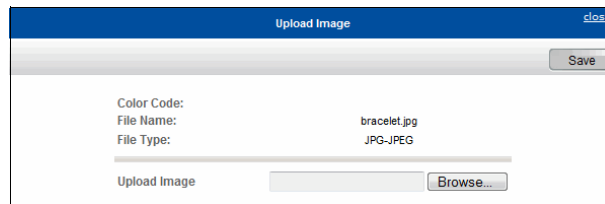
<input type="checkbox"/>	Product	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	PRODUCT0021	PRODUCT0021	05/22/13	08/07/13	9	9	0
<input type="checkbox"/>	PRODUCT009	PRODUCT009	05/31/13	05/31/13	1	1	0

The Product Media page opens.



3 Click **Upload Image** for the appropriate Product image.

The Upload Image popup opens.



4 Click **Browse**. The Choose File to Upload dialog box opens.

5 Navigate to the image you want to upload, select it, and click **Open**. The path to the file displays in the Upload Image box.

6 Click **Save**.

The image has been added to the Product.

Updating Product Image Attributes

You can update images attributes associated with a Product.

To update image attributes associated with a Product

1 Find the Product whose image attributes you want to update.

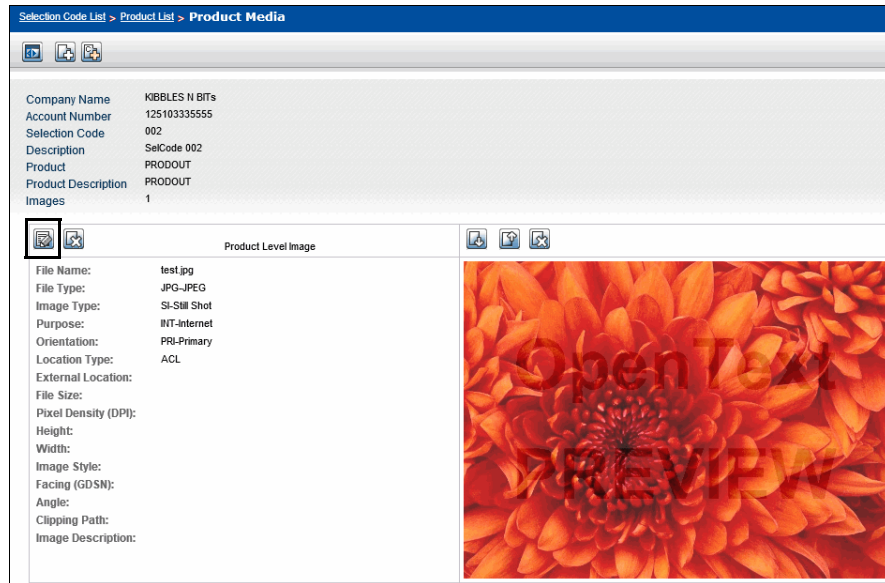
- See "Finding Products Across Selection Codes" on page 80.
- See "Finding Products Under One Selection Code" on page 82.

The Product List page opens.

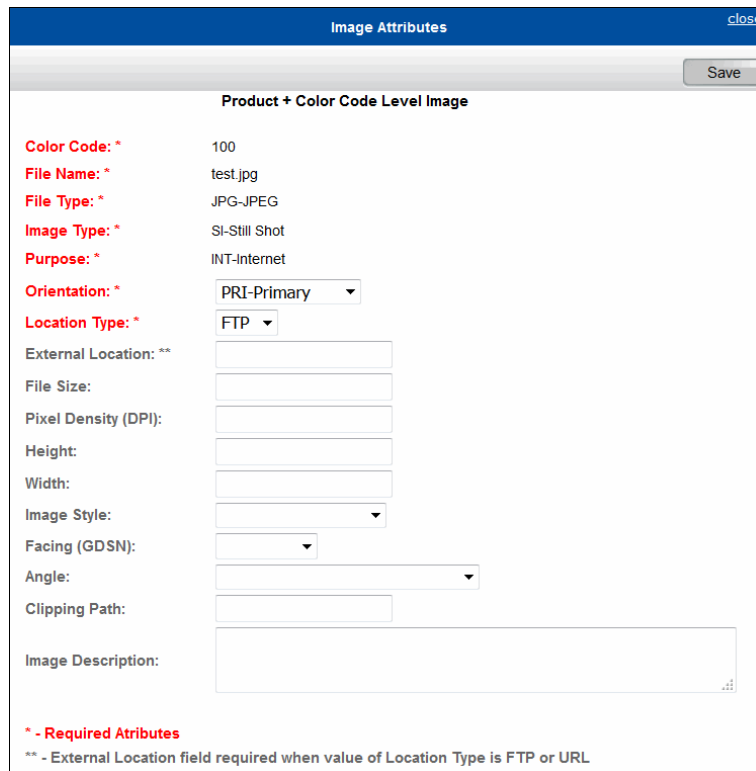
2 Click the image hyperlink (in the Image column) for the Product whose image attributes you want to update.

<input type="checkbox"/>	Product	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	IMAGEPROD2	Image Product 2	08/19/13	08/19/13	2	2	2

The Product Media page opens.



- 3 Click **Update Image Attributes** for the appropriate Product image. The Product Level Image or Product + Color Code Level Image Attributes popup opens, depending on the image.



- 4 Use the attribute fields and/or drop-down lists to update the image attribute values of the image. The required attributes are highlighted in red with a red asterisk.

- **Color Code**—Displays for Product + Color Code Level images only. Cannot be changed once attribute set is added.
- **File Name**—Cannot be changed once attribute set is added.
- **File Type**—Required. The type of file. Value must be JPG (JPEG).
- **Image Type**—Required. The type of image. Value must be SI (Still Shot).
- **Purpose**—Required. The intended use of the image. Value must be INT (internet).
- **Orientation**—Required. The orientation of the image:
 - PRI - Primary
 - SDL - Side Left
 - SDR - Side Right
 - VF1 - Front
 - VIB - Bottom
 - VIK - Back
 - VIS - Side
 - VIT - Top
- **Location Type**—Required. The location type for the image:
 - ACL - Application Transaction Reference Number
 - FTP - File Transfer Protocol
 - LMI - Local Media Identifier
 - URL - Uniform Resource Locator
- **External Location**—Required only when value of Location Type is FTP or URL. The location of the image.
- **File Size**—Optional. The size of the file.
- **Pixel Density (DPI)**—Optional. Pixel density (DPI) for image.
- **Height**—Optional. The image pixel height.
- **Width**—Optional. The image pixel width.
- **Image Style**—Optional. The image style:
 - CSW - Color swatch
 - PRO - Product
- **Facing (GDSN)**—Optional. The direction from which the image is viewed:
 - 1 - Front
 - 2 - Left
 - 3 - Top
 - 7 - Back
 - 8 - Right
 - 9 - Bottom
- **Angle**—Optional. The horizontal direction of the image:

- 1 - Center, No plunge angle
- 2 - Left, No plunge angle
- 3 - Right, No plunge angle
- 7 - Center, Plunge angle present
- 8 - Left, Plunge angle present
- 9 - Right, Plunge angle present
- **Clipping Path**—Optional. The name of a path defined in the image itself that defines the outline of the subject of the image.
- **Image Description**—Optional. The description of the image.

5 Click **Save**.

The Product image attribute set has been updated.

Updating Product Physical Images

Uploading a new image replaces the current image; you do not need to delete an image before uploading a new one.

To upload a new Product physical image to replace a current image, see [“Adding \(Uploading\) Physical Images to a Product” on page 139](#).

Deleting Image Attributes from a Product

Image attributes can be deleted from a Product.

Note: Deleting the image attributes from a Product also deletes any physical image associated with that attribute set.

To delete image attributes from a Product

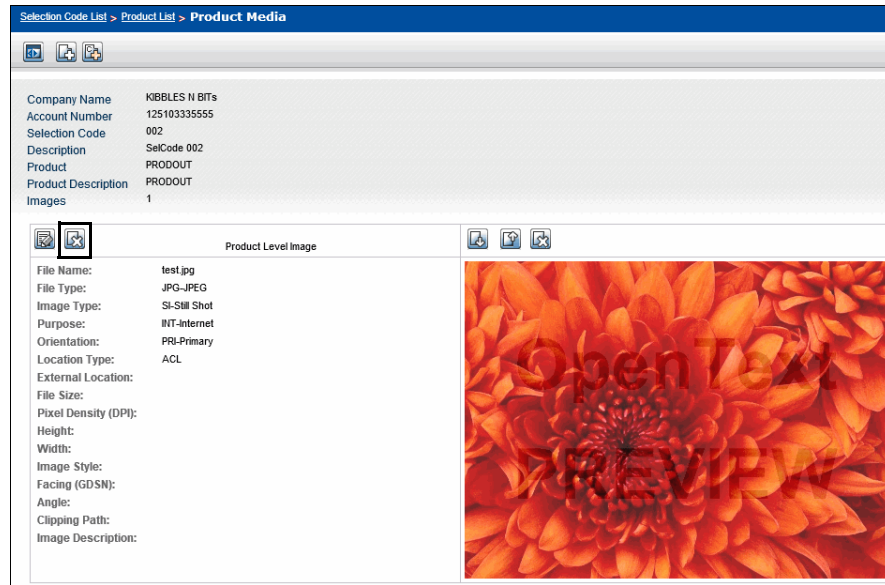
- 1 Find the Product from which you want to delete the image attributes.
 - See [“Finding Products Across Selection Codes” on page 80](#).
 - See [“Finding Products Under One Selection Code” on page 82](#).

The Product List page opens.

- 2 Click the image hyperlink (in the Image column) for the Product whose image attributes you want to delete.

<input type="checkbox"/>	Product △	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	IMAGEPROD2	Image Product 2	08/19/13	08/19/13	2	2	2

The Product Media page opens.



3 Click **Delete Image Attributes** for the appropriate Product image. A message asks if you want to proceed with deletion of the image attributes.

Note: Deleting a set of image attributes from a Product also deletes any physical image that is also associated with that set of image attributes.

4 Do one of the following:

- To delete the attributes, click **OK**.
- To cancel the deletion, click **Cancel**.

Deleting Physical Images from a Product

Physical images can be deleted from a Product.

To delete a physical image from a Product

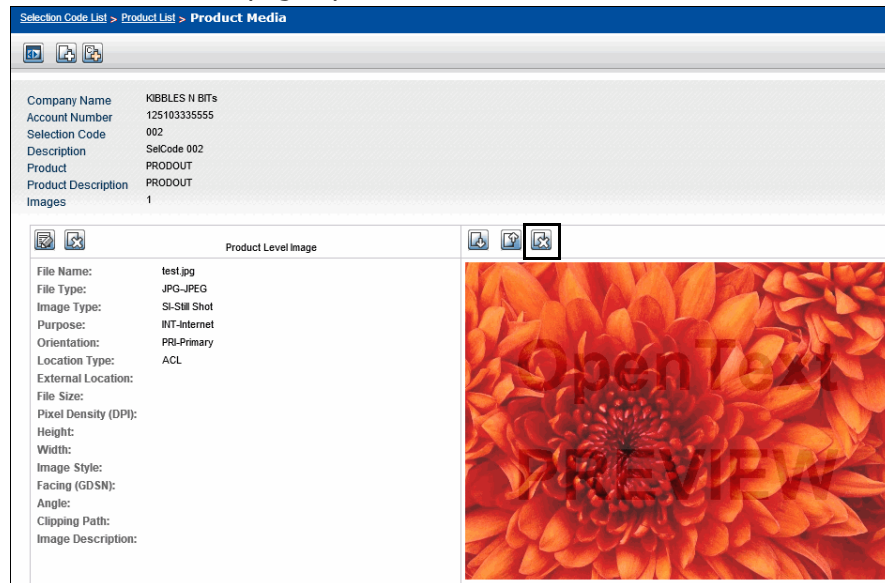
- 1** Find the Product from which you want to delete the image.
 - See "Finding Products Across Selection Codes" on page 80.
 - See "Finding Products Under One Selection Code" on page 82.

The Product List page opens.

2 Click the image hyperlink (in the Image column) for the Product whose image you want to delete.

<input type="checkbox"/>	Product	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	IMAGEPROD2	Image Product 2	08/19/13	08/19/13	2	2	2

The Product Media page opens.



- 3 Click **Delete Image** for the appropriate Product image. A message asks if you want to proceed with deletion of the image.
- 4 Do one of the following:
 - To delete the physical image, click **OK**.
 - To cancel the deletion, click **Cancel**.

Adding GTINs

To add a GTIN, you must know the Product that will contain the GTIN. Also, you cannot move an existing GTIN to another Product. Delete the GTIN, and then re-add it under the other Product.

To add a GTIN

- 1 Click **Catalogue > Advanced Search**. The Find Catalogue Data page opens.
- 2 Select **Product**.
- 3 Select one of the following Product search options:
 - **Identifier**—The Product identifier
 - **Description**—The description of the Product
 - **Compressed**—The compressed Product identifier (leading zeros, spaces, and special characters are ignored)

If you perform a Compressed Product search, the system retrieves all Products with compressed product values that exactly match the value you type in the Product field. Compressed Product identifiers omit leading zeroes, spaces, and special characters in Product identifiers for purposes of the Product search.

For example, the Compressed Product identifier for 000324 MENS SHOES is 324MENSSHOES. Sending 324MENSSHOES in a Compressed Product

search returns all Products with that sequence of characters, ignoring leading zeroes, spaces, and special characters in the actual Product identifiers.

4 Select **EQUAL** from the Product drop-down list (EQUAL is automatically selected and is the only option for Description and Compressed), and type the full Product identifier, description, or compressed Product identifier in the field.

5 Click **Search**.

One of the following occurs:

- If the Product already contains GTINs, the GTIN List page opens. Go to Step 7.
- If the Product does not contain any GTINs, the Product List page opens. Go to Step 6.

6 On the Product List page, in the GTINs column, click the 0 (zero) hyperlink.

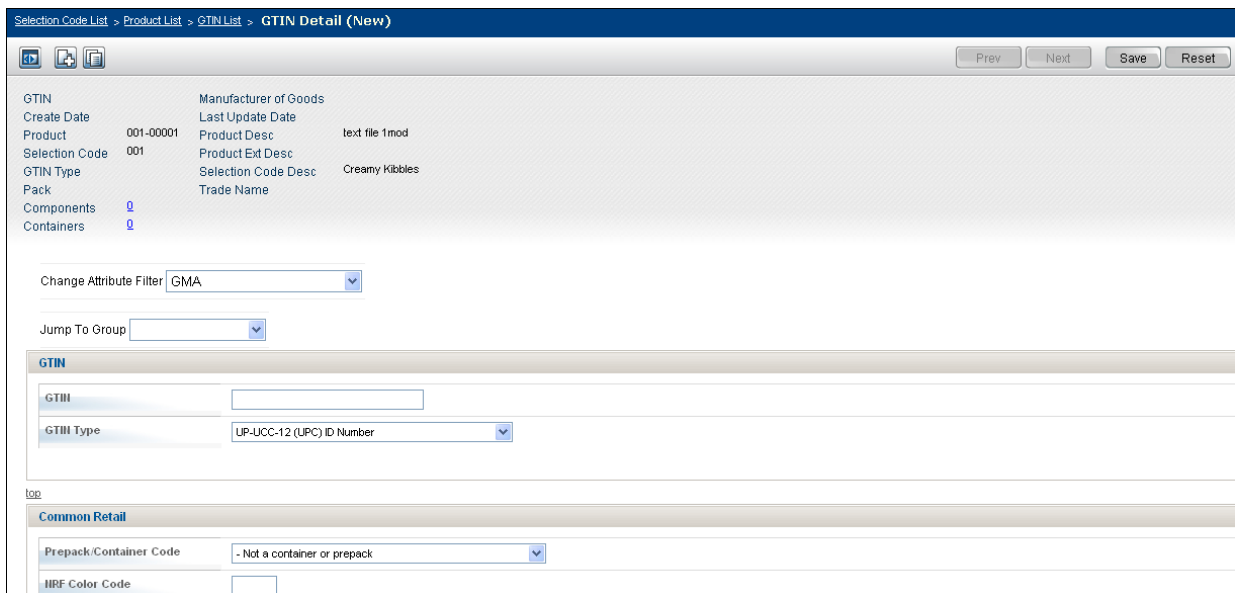


The GTIN List page opens.

7 On the GTIN List page, click **Add**.



The GTIN Detail (New) page opens.



8 Optional. To change the attribute filter (the filter determines the attributes that display on the page), select an attribute filter from the **Change Attribute Filter** drop-down list.

9 Enter the unique **GTIN** and **GTIN Type**. To automatically calculate a check digit for the GTIN, go to the following URL:

http://www.gs1us.org/solutions_services/tools/check_digit_calculator

See "GTIN Number Structures" on page 256.

- 10 Populate all required attributes. Use the following tips:
 - See “Working with Attributes” on page 163.
 - To jump to a specific attribute group, select an attribute group from the **Jump To Group** drop-down list.
 - To use the Find link for the Color Code and Size Code fields, see “Find Link” on page 17.
- 11 Optional. To make the GTIN a container, use the **Prepack/Container Code** field. See the following:
 - “GTIN Validation” on page 160.
 - “Container and Component GTIN Codes” on page 258.
- 12 Do one of the following:
 - To save the GTIN, click **Save**.
 - To save the GTIN and add more GTINs to the Product, click **Add** and repeat Steps 8 through 11.
 - To save the GTIN and base a new GTIN on a copy of the GTIN you are adding, click **Copy**. See “Adding GTINs By Copying and Modifying an Existing GTIN” on page 147.

Adding GTINs By Copying and Modifying an Existing GTIN

To save time adding the attribute data of a new GTIN, you can copy the attribute data of an existing GTIN and modify it.

To add a GTIN by copying and modifying an existing GTIN

- 1 Find the GTIN that you want to copy and modify for the new GTIN, or add a GTIN that will be used as the basis for the new GTIN:
 - See “Finding GTINs Across Selection Codes” on page 88.
 - See “Finding GTINs Under One Product” on page 90.
 - See “Adding GTINs” on page 145.
- 2 Open the GTIN Detail (Copy) page using one of these methods:
 - On a GTIN List page, select the check box to the left of the GTIN you want to copy, then click **Copy**.
 - On the GTIN Detail (New), GTIN Detail (Edit), or GTIN Detail (View) page, click **Copy**.

The GTIN Detail (Copy) page opens with attributes populated with the same values as the selected GTIN.

- 3 Optional. To change the attribute filter (which determines the attributes that display on the page), select an attribute filter from the **Change Attribute Filter** drop-down list (under the heading information)
- 4 Enter the new **GTIN** and **GTIN Type** (use all caps). To automatically calculate a check digit for the GTIN, go to the following URL:
http://www.gs1us.org/solutions_services/tools/check_digit_calculator

See [“GTIN Number Structures”](#) on page 256.

- 5 Populate all required attributes. Use the following tips:
 - See [“Working with Attributes”](#) on page 163.
 - To jump to a specific attribute group, select an attribute group from the **Jump To Group** drop-down list.
 - To use the Find link for the Color Code and Size Code fields, see [“Find Link”](#) on page 17.
- 6 Optional. To make the GTIN a container, use the **Prepack/Container Code** field. See the following:
 - [“GTIN Validation”](#) on page 160.
 - [“Container and Component GTIN Codes”](#) on page 258.
- 7 Optional for OpenText Active Catalogue vendors. Change the **Product** and **Product Desc** (Product description). Optionally, you can also change the **Product Extended Desc** (Product extended description) field to do either of the following:
 - Create a new **Product** with **Product Desc** (Product description) to place the new GTIN under.
 - Enter the **Product** and **Product Desc** (Product description) of a different, existing Product to place the new GTIN under.

Note: **Product Desc** (Product description) must contain a value, but it will be ignored for Products that already exist.
- 8 Use the attribute fields and/or drop-down lists to add or edit attribute values. See [“Working with Attributes”](#) on page 163.

Note: Use the same attribute filter as for the original GTIN. Otherwise, some attributes in the original may not be included in the new GTIN.
- 9 Do one of the following:
 - To save the new GTIN, click **Save**.
 - To save the new GTIN and add another GTIN that is *not* based on an existing GTIN (copied), click **Add**.

Editing GTINs

Use the Edit GTIN Details page to add or change GTIN attribute values. You can edit GTIN attributes, but not the **GTIN** and **GTIN Type**.

To edit GTIN attributes

- 1 Find the GTIN to edit:
 - See [“Finding GTINs Across Selection Codes”](#) on page 88.
 - See [“Finding GTINs Under One Product”](#) on page 90.
- 2 Select the check box to the left of the GTIN you want to edit, then click **Edit**. (You can also click **Edit** on the GTIN Detail (View) page).

The GTIN Detail (Edit) page opens.

To view all the associated attributes, use the horizontal scroll bar at the bottom of the page, and/or hide the navigation panel.

- 3 Use the attribute fields and/or drop-down lists to add or edit attribute values. Use the following tips:
 - See ["Working with Attributes" on page 163](#).
 - To jump to a specific attribute group, select an attribute group from the **Jump To Group** drop-down list.
 - To use the Find link for the Color Code and Size Code fields, see ["Find Link" on page 17](#).
- 4 Do one of the following:
 - To save your edits, click **Save**.
 - To save your edits and move on to edit the next GTIN, click **Save & Next**.
 - To save your edits and add a new GTIN, click **Add**.
 - To save your edits and add a new GTIN with attributes automatically populated the same as the current GTIN, click **Copy**.

Editing Multiple GTINs under a Product

Use the Edit GTIN Details page to update GTIN attribute values for multiple GTINs under a Product. A minimum of two GTINs and a maximum of 25 GTINs can be modified at one time.

The following attributes cannot be updated for multiple GTINs at one time:

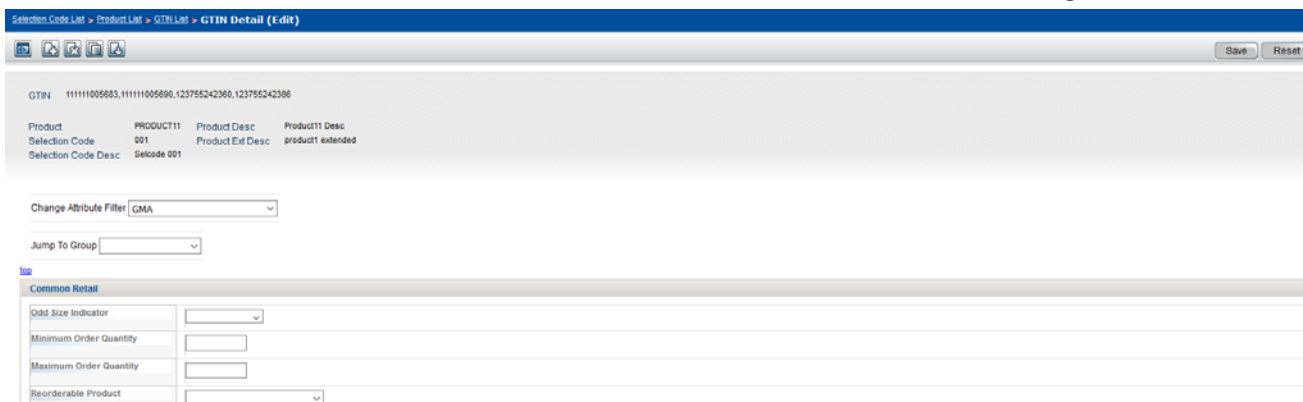
- Prepack/Container Code
- Color Code
- Color Description
- Size Code
- Size Description

To update multiple GTINs

- 1 Find the GTINs you want to update:
 - See "Finding GTINs Under One Product" on page 90.
- 2 Select the check boxes to the left of the GTINs you want to update (or select the check box in the header to select all GTINs and then deselect those you do not want to update), then click **Edit**.

The GTIN Detail (Edit) page opens.

Note: All attribute fields are blank. This is an update action (not replace), so only populated attributes will be updated for all the GTINs that are selected; blank attributes values will NOT overwrite or delete existing attribute values.



To view all the associated attributes, use the horizontal scroll bar at the bottom of the page, and/or hide the navigation panel.

- 3 Use the attribute fields and/or drop-down lists to populate attribute values. Use the following tips:
 - See "Working with Attributes" on page 163.
 - To jump to a specific attribute group, select an attribute group from the **Jump To Group** drop-down list.
- 4 Do one of the following:
 - To clear all fields, click **Reset**. Return to [step 3](#) to populate attribute values.
 - To save your edits, click **Save**. A message indicates that the attribute values on the page will be applied to the number of GTINs you have selected. Click **Yes** to continue or **No** to Cancel. Upon saving, your changes are applied to the selected attributes.

Deleting GTINs

If you delete a GTIN, the GTIN (including all GTIN images) will be permanently deleted.

To delete a GTIN

- 1 Find the GTIN to delete:

- See "Finding GTINs Across Selection Codes" on page 88.
 - See "Finding GTINs Under One Product" on page 90.
- 2 Select the check box to the left of the GTIN you want to edit.
 - 3 Click **Delete**. You can also click **Delete** on the GTIN Detail (View) page. A message asks if you want to proceed with deletion of the GTIN.
 - 4 Do one of the following:
 - To delete the GTIN, click **OK**. A message confirms the deletion or reports an error.
 - To cancel the deletion, click **Cancel**.

Adding Image Attributes to a GTIN

A set of image attributes can be added to a GTIN. An attribute set represents a single image and must be added for every image you want to add to the GTIN. The file name must be unique for each attribute set within a GTIN.

Once a set of image attributes has been added, you can add (upload) a physical image that is associated with that set of attributes. Multiple attribute sets (and physical images) can be added for each GTIN.

To add image attributes to a GTIN

- 1 Find the GTIN you want to add the image attributes to.
 - See "Finding GTINs Across Selection Codes" on page 88.
 - See "Finding GTINs Under One Product" on page 90.

The GTIN List page opens.

- 2 Click the image hyperlink (in the Image column) for the GTIN.

<input type="checkbox"/>			GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>			111111033006	UP		003	Silver	10031	31			02/07/12			0
<input type="checkbox"/>			111111033136	UP		003	Silver3	10031	31			02/08/12			0

The Item Media page opens.

Selection Code List > Product List > GTIN List > Item Media

Company Name	KIBBLES N BITS
Account Number	125103335555
Selection Code	015
Description	015 Image Attributes
Product	IMAGEATT1
Product Description	Image Attributes 1
GTIN	111111033006
GTIN Type	UP
Images	0

- 3 Click **Add Item Level Image**.

The Item Level Image Attributes popup opens.

4 Use the attribute fields and/or drop-down lists to add the attribute values of the image.

The required attributes are highlighted in red with a red asterisk.

- **File Name**—Required. The file name of the attribute set. The name must be unique for each attribute set within a GTIN. Cannot be changed once attribute set is added.
 - Note:** You must include the file extension; for example, sample.jpg. Do not use any of the following illegal characters < > ^ : & ? \ / | + %
- **File Type**—Required. The type of file. Value must be JPG (JPEG).
- **Image Type**—Required. The type of image. Value must be SI (Still Shot).
- **Purpose**—Required. The intended use of the image. Value must be INT (internet).
- **Orientation**—Required. The orientation of the image:
 - PRI - Primary
 - SDL - Side Left
 - SDR - Side Right
 - VF1 - Front
 - VIB - Bottom
 - VIK - Back
 - VIS - Side
 - VIT - Top

- **Location Type**—Required. The location type for the image:
 - ACL - Application Transaction Reference Number
 - FTP - File Transfer Protocol
 - LMI - Local Media Identifier
 - URL - Uniform Resource Locator
- **External Location**—Required only when value of Location Type is FTP or URL. The location of the image.
- **File Size**—Optional. The size of the file.
- **Pixel Density (DPI)**—Optional. Pixel density (DPI) for image.
- **Height**—Optional. The image pixel height.
- **Width**—Optional. The image pixel width.
- **Image Style**—Optional. The image style:
 - CSW - Color swatch
 - PRO - Product
- **Facing (GDSN)**—Optional. The direction from which the image is viewed:
 - 1 - Front
 - 2 - Left
 - 3 - Top
 - 7 - Back
 - 8 - Right
 - 9 - Bottom
- **Angle**—Optional. The horizontal direction of the image:
 - 1 - Center, No plunge angle
 - 2 - Left, No plunge angle
 - 3 - Right, No plunge angle
 - 7 - Center, Plunge angle present
 - 8 - Left, Plunge angle present
 - 9 - Right, Plunge angle present
- **Clipping Path**—Optional. The name of a path defined in the image itself that defines the outline of the subject of the image.
- **Image Description**—Optional. A description of the image.

5 Click **Save**.

The image attribute set has been added to the GTIN.

To add a physical image to the GTIN, see ["Adding \(Uploading\) Physical Images to a GTIN" on page 154](#).

Adding (Uploading) Physical Images to a GTIN

Once a set of image attributes has been added to a GTIN (see "Adding Image Attributes to a GTIN" on page 151), you can add (upload) a physical image that is associated with that set of attributes. Multiple attribute sets (and physical images) can be added for each GTIN.

Note: Image file type must be JPEG with the level of compression at 10 or above. Image size is limited to 500 KB per image. There is a limit of 50,000 images per account.

Uploading an image replaces the current image, if one already exists. You do not need to delete an image before uploading a new one. Therefore, you can also use the following procedure to update an existing image.

To add (upload) a physical image to a GTIN

- 1 Find the GTIN you want to add the physical image to.
 - See "Finding GTINs Across Selection Codes" on page 88.
 - See "Finding GTINs Under One Product" on page 90.

The GTIN List page opens.

- 2 Click the image hyperlink (in the Image column) for the GTIN you want to add the image to.

<input type="checkbox"/>			GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>			111111033006	UP		003	Silver	10031	31			02/07/12			0
<input type="checkbox"/>			111111033136	UP		003	Silver3	10031	31			02/08/12			0

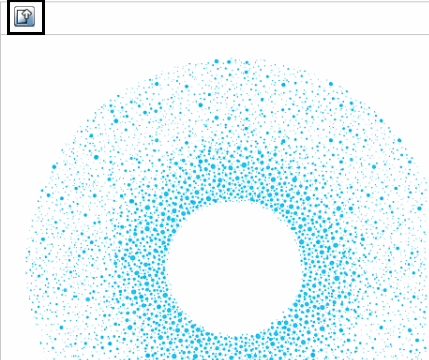
The Item Media page opens.

Selection Code List > Product List > GTIN List > Item Media

Company Name: KIBBLES N BITS
 Account Number: 12510333555
 Selection Code: 011
 Description: Selcode 011
 Product: NEWPRODUCT
 Product Description: NEWPRODUCT
 GTIN: 66666038001
 GTIN Type: UP
 Images: 2

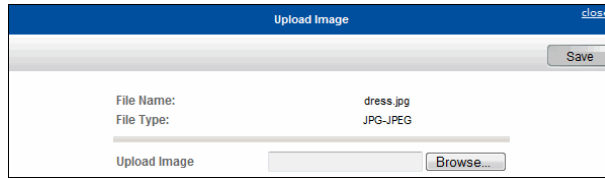
Item Level Image

File Name: ItemImage.jpeg
 File Type: JPG-JPEG
 Image Type: SI-SM Shot
 Purpose: IIT-Internet
 Orientation: PR-Primary
 Location Type: FTP
 External Location: FTP://Locations/FileImage
 File Size: 15
 Pixel Density (DPI): 22
 Height: 25
 Width: 15
 Image Style: CSW-Color Swatch
 Facing (GDSN): 1-Front
 Angle: 1-Center, No plunge angle
 Clipping Path: ClipPathValue
 Image Description: Large Image Desc Value



- 3 Click **Upload Image** for the appropriate GTIN image attribute set.

The Upload Image popup opens.



- 4 Click **Browse**. The Choose File to Upload dialog box opens.
- 5 Navigate to the image you want to upload, select it, and click **Open**. The path to the file displays in the Upload Image box.
- 6 Click **Save**.
 The image has been added to the GTIN.

Updating GTIN Image Attributes

You can update images attributes associated with a GTIN.

To update image attributes associated with a GTIN

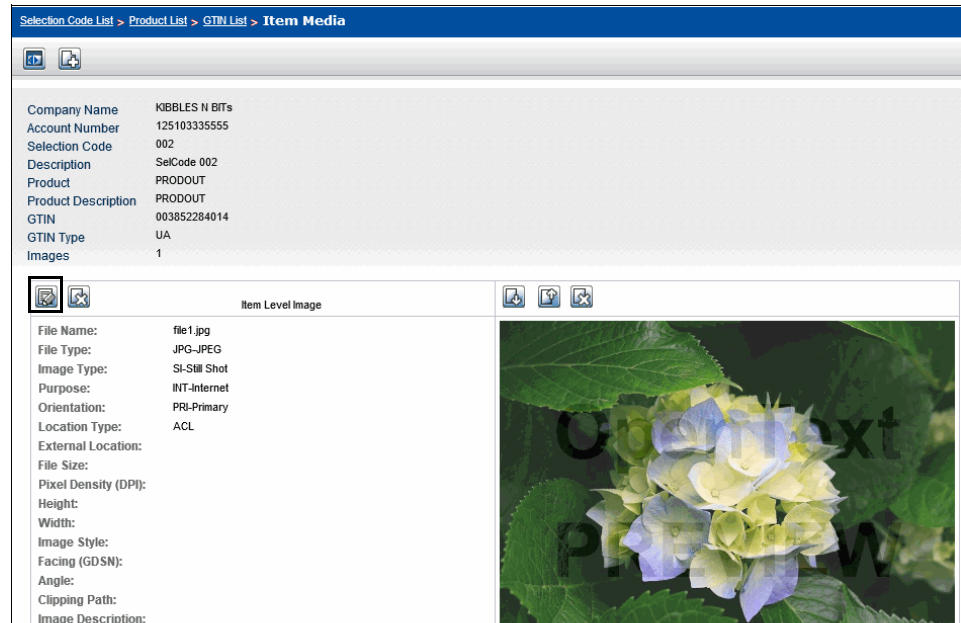
- 1 Find the GTIN whose image attributes you want to update.
 - See ["Finding GTINs Across Selection Codes"](#) on page 88.
 - See ["Finding GTINs Under One Product"](#) on page 90.

The GTIN List page opens.

- 2 Click the image hyperlink (in the Image column) for the GTIN whose image attributes you want to update.

<input type="checkbox"/>		GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>		111111032849	UP		003	Silver	10031	31			08/19/13			1
<input type="checkbox"/>		111111032856	UP		004	Silver4	10031	31			08/19/13			1

The Item Media page opens.



- 3 Click **Update Image Attributes** for the appropriate GTIN image. The Item Image Level Attribute popup opens.



- 4 Use the attribute fields and/or drop-down lists to add the image attribute values of the image.

The required attributes are highlighted in red with a red asterisk.

- **File Name**— Cannot be changed once attribute set is added.
- **File Type**—Required. The type of file. Value must be JPG (JPEG).
- **Image Type**—Required. The type of image. Value must be SI (Still Shot).
- **Purpose**—Required. The intended use of the image. Value must be INT (internet).
- **Orientation**—Required. The orientation of the image:
 - PRI - Primary
 - SDL - Side Left
 - SDR - Side Right
 - VF1 - Front
 - VIB - Bottom
 - VIK - Back
 - VIS - Side
 - VIT - Top
- **Location Type**—Required. The location type for the image:
 - ACL - Application Transaction Reference Number
 - FTP - File Transfer Protocol
 - LMI - Local Media Identifier
 - URL - Uniform Resource Locator
- **External Location**—Required only when value of Location Type is FTP or URL. The location of the image.
- **File Size**—Optional. The size of the file.
- **Pixel Density (DPI)**—Optional. Pixel density (DPI) for image.
- **Height**—Optional. The image pixel height.
- **Width**—Optional. The image pixel width.
- **Image Style**—Optional. The image style:
 - CSW - Color swatch
 - PRO - Product
- **Facing (GDSN)**—Optional. The direction from which the image is viewed:
 - 1 - Front
 - 2 - Left
 - 3 - Top
 - 7 - Back
 - 8 - Right
 - 9 - Bottom
- **Angle**—Optional. The horizontal direction of the image:
 - 1 - Center, No plunge angle

- 2 - Left, No plunge angle
 - 3 - Right, No plunge angle
 - 7 - Center, Plunge angle present
 - 8 - Left, Plunge angle present
 - 9 - Right, Plunge angle present
 - **Clipping Path**—Optional. The name of a path defined in the image itself that defines the outline of the subject of the image.
 - **Image Description**—Optional. A description of the image.
- 5 Click **Save**.
The GTIN image attribute set has been updated.

Updating GTIN Physical Images

Uploading a new image replaces the current image; you do not need to delete an image before uploading a new one.

To upload a new GTIN physical image to replace a current image, see [“Adding \(Uploading\) Physical Images to a GTIN” on page 154](#).

Deleting Image Attributes from a GTIN

Image attributes can be deleted from a GTIN.

Note: Deleting the image attributes from a GTIN also deletes any physical image associated with that attribute set.

To delete image attributes from a GTIN

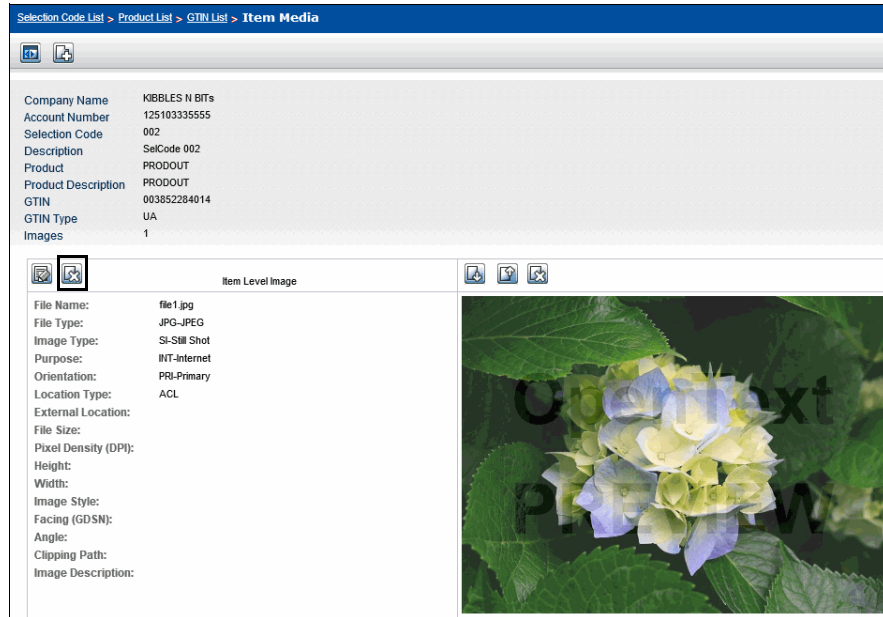
- 1 Find the GTIN from which you want to delete the image attributes.
 - See [“Finding GTINs Across Selection Codes” on page 88](#).
 - See [“Finding GTINs Under One Product” on page 90](#).

The GTIN List page opens.

- 2 Click the image hyperlink (in the Image column) for the GTIN whose image attributes you want to delete.

<input type="checkbox"/>			GTIN		GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>			111111032849	UP		003	Silver	10031	31				08/19/13			1
<input type="checkbox"/>			111111032856	UP		004	Silver4	10031	31				08/19/13			1

The Item Media page opens.



3 Click **Delete Image Attributes** for the appropriate GTIN image. A message asks if you want to proceed with deletion of the image attributes.

Note: Deleting a set of image attributes from a GTIN also deletes any physical image that is also associated with that set of image attributes.

4 Do one of the following:

- To delete the image attributes, click **OK**.
- To cancel the deletion, click **Cancel**.

Deleting Physical Images from a GTIN

Physical images can be deleted from a GTIN.

To delete a physical image from a GTIN

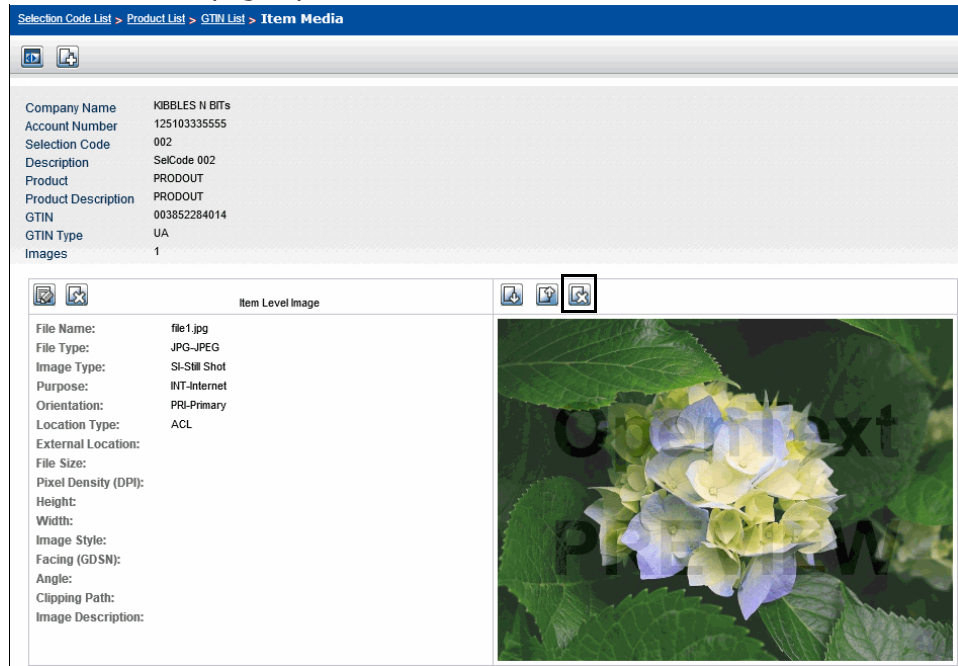
- 1 Find the GTIN from which you want to delete the image.
 - See "Finding GTINs Across Selection Codes" on page 88.
 - See "Finding GTINs Under One Product" on page 90.

The GTIN List page opens.

2 Click the image hyperlink (in the Image column) for the GTIN whose image you want to delete.

<input type="checkbox"/>			GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>			111111032849	UP		003	Silver	10031	31			08/19/13			1
<input type="checkbox"/>			111111032856	UP		004	Silver4	10031	31			08/19/13			1

The Item Media page opens.



- 3 Click **Delete Image** for the appropriate GTIN image. A message asks if you want to proceed with deletion of the image.
- 4 Do one of the following:
 - To delete the physical image, click **OK**.
 - To cancel the deletion, click **Cancel**.

GTIN Validation

Data is validated when it is saved to OpenText Active Catalogue.

When adding or updating GTINs, OpenText Active Catalogue checks to make sure that:

- The following characters do not appear in any data > ^ ` [] * ~
- If the Prefix Validation compliance check is turned on, the GTIN begins with a GS1 (UCC/EAN) Company Prefix (formerly UCC Manufacturer Block ID) that is associated with your account. The compliance check can be applied to all GTIN types except EO and UA. For more information about compliance checks, see [Chapter 8, "Working with Compliance Checks," on page 120](#).
- Each GTIN identifier is unique in the vendor catalogue.

Note: A GTIN can exist in catalogues of a manufacturer (account type V) and one or more distributors (account type D).
- Correct check digit appears.

- GTIN numbers meet the requirements of the associated GTIN type. See [“GTIN Number Structures”](#) on page 256.

Note: Catalogue does not perform GTIN validation of mock GTINs for Intelligent Web Forms (IWF) customers whose accounts are set up to allow mock GTINs.

Maintaining Container and Component GTINs

Containers (also called prepacks or parent items) are GTINs that contain other GTINs called components (also called child items).

Container and component rules are as follows:

- Specify the GTIN as a container when you add the GTIN to the catalogue.
- Create and save the container GTIN before assigning components to it.
- You can change a container designation only to a different container designation, not to a no designation or component designation.
- A component designation is not required for a GTIN to be a component, but if the GTIN is to be sold *only* as part of a container it should be designated a component.
- A GTIN can be designated a component at the time it is added to the catalogue or later (that is, assign it to a container later).
- To change a component's quantity or unit of measure (UOM), you must remove the component from the container, then add it to the container again with the corrected information.
- A component does not require the same Selection Code and/or Product as its container.
- Deleting a container does not delete its components. It deletes only the container and severs the container-component relationships.
- A component GTIN can be deleted without first removing the component from the container.
- A Selection Code or Product above containers can be deleted without first deleting the containers.
- A container can have from 0 to 100 GTIN components.
- A container can contain containers, but the second level of containers cannot contain a third level of containers (that is, you can have container/containers/components).

Assigning Components to a Container

To assign a GTIN as a component, the GTIN must already exist in OpenText Active Catalogue. You can also assign a container as a component to another container.

To assign a component to a container

- 1 Find the GTIN container:
 - See [“Finding GTINs Across Selection Codes”](#) on page 88.
 - See [“Finding GTINs Under One Product”](#) on page 90.

2 On the GTIN List page, in the Components column, click the **Component hyperlink** of the GTIN container that you want to assign components to.

Note: You can also click the Component hyperlink on the GTIN Detail screens.

Tip: Filter the GTIN list by Pack type. In the Pack column, a container is indicated by any value except PP, which indicates the GTIN is a component.

The View Components pop-up opens listing all components (and containers, if any) that are part of the selected container.

GTIN	GTIN Type	Quantity	Pack	Unit of Measure	Color	Color Description	Size	Size Description
691751700488	UP	12		EA	600	RED	30108	8
691751700518	UP	15		EA	600	RED	30114	14
691751700501	UP	23		EA	600	RED	30112	12
691751700495	UP	32		EA	600	RED	30110	10
691751700525	UP	6		EA	600	RED	30116	16

3 Click **Add**. The fields for assigning a component display at the top of the pop-up.

Component GTIN: GTIN Type: UP Quantity: 0 Unit of Measure: EA

GTIN	GTIN Type	Quantity	Pack	Unit of Measure	Color	Color Description	Size	Size Description
691751700488	UP	12		EA	600	RED	30108	8
691751700518	UP	15		EA	600	RED	30114	14
691751700501	UP	23		EA	600	RED	30112	12
691751700495	UP	32		EA	600	RED	30110	10
691751700525	UP	6		EA	600	RED	30116	16

4 Enter the component's information:

- **Component GTIN**—The GTIN identifier
- **GTIN Type**—The type of GTIN
- **Quantity**— The quantity of the component in the container
- **Unit of Measure**—The unit of measure for the quantity. See ["Container and Component GTIN Codes"](#) on page 258.

Note: To change a component's quantity or unit of measure (UOM), you must remove the component from the container, then add it again with the corrected information. See ["Removing Components From a Container"](#) on page 162.

5 Do one of the following;

- To add the component, click **Save**.
- To return to the previous page without saving your changes, click **Cancel**.

Removing Components From a Container

Removing a component from a container does not remove it from your catalogue.

To remove a component from a container

- 1 Find the container GTIN.
 - See “Finding GTINs Across Selection Codes” on page 88.
 - See “Finding GTINs Under One Product” on page 90.
- 2 On the GTIN List page, in the Components column, click the **Component hyperlink** of the GTIN container from which you want to remove components. The View Components pop-up opens.

Note: You can also click the Component hyperlink on the GTIN Detail screens.

Tip: Filter the GTIN list by Pack type. In the Pack column, a container is indicated by any value except PP, which indicates component.

The View Components pop-up opens listing all components (and containers, if any) that are part of the selected container.

<input type="checkbox"/>	GTIN	GTIN Type	Quantity	Pack	Unit of Measure	Color	Color Description	Size	Size Description
<input type="checkbox"/>	691751700488	UP	12		EA	600	RED	30108	8
<input type="checkbox"/>	691751700518	UP	15		EA	600	RED	30114	14
<input type="checkbox"/>	691751700501	UP	23		EA	600	RED	30112	12
<input type="checkbox"/>	691751700495	UP	32		EA	600	RED	30110	10
<input type="checkbox"/>	691751700525	UP	6		EA	600	RED	30116	16

- 3 In the column to the left of the component GTIN, select the check box for each component GTIN to delete from the container.

Note: To view details of the component, click the GTIN’s hyperlink in the GTIN column.

- 4 Click **Delete**. The components are removed from the container.

Working with Attributes

This section explains how to work with data attributes when maintaining your catalogue.

Attributes are details (for example, Color, Unit Cost) of the associated record (for example, GTIN). The hundreds of GTIN attributes supported by OpenText Active Catalogue are organized in Attribute Groups. See “GTIN Attribute Groups” on page 69.

Item attributes may fall under an industry standard. See “GTIN Attribute Rules” on page 164.

The only data attributes in OpenText Active Catalogue not used exclusively with GTINs are:

- Account attributes
- Selection Code Description
- Product Description

- Product Extended Description

Note: To confirm that the attribute value you just added or updated actually loaded to your catalogue, click the browser **Refresh** on the open Add or Edit page. If the data loaded, it will appear on the page. If it did not load, try to load it again using an Edit page, not an Add page.

GTIN Attribute Conventions

OpenText Active Catalogue employs the following conventions in its handling of GTIN attributes:

- To restrict the display and export of GTIN attributes, apply an attribute filter. See [“Working with Attribute Filters” on page 68](#).
- Press **Tab** to jump to the next attribute in a list.
- The required number structures for GTIN types supported by OpenText Active Catalogue are described in [“GTIN Number Structures” on page 256](#).
- If a GTIN Description does not exist, the Color Code, Color Description, Size Code, and Size Description are combined to serve as a GTIN description and appear in brackets ([]).
- When saving a GTIN, if an attribute error exists, a message describing the error displays. Fix the error and save again.
- To view the format requirements and definition of the attribute, move your cursor over the attribute name.

GTIN Attribute Rules

To ensure validation of your attributes during processing, follow these rules:

- Follow the attribute’s format requirements. The format requirements and definition display as you move your cursor over the attribute name on the GTIN Detail (New), GTIN Detail (Edit), and GTIN Detail (Copy) pages.

The possible data types are:

- CHAR indicates alphanumeric
- NUMBER indicates numeric
- DATE indicates the date format

Data Type	Description
CHAR	The maximum number of alphanumeric characters allowed.
NUMBER	The maximum number of numeric characters allowed (first digit). A second digit, if any, indicates the number of digits allowed to the right of the decimal.
DATE	Use the DATE format you selected as your account preference. See “Maintaining Your Account” on page 49 .

- The following characters should not appear in any data loaded into OpenText Active Catalogue > ^ ` [] * ~
- Select Unit of Measure (UOM), where applicable, from the drop-down list next to the attribute value field.

- Booking Date must precede Availability Date, which must precede Discontinue Date.
- Use a Cancel Date only if the GTIN was never produced or shipped. (The GTIN is automatically deleted 12 months after the Cancel Date.) If the GTIN was produced or shipped, use a Discontinue Date.
- Additional industry standard compliance checks may be configured for your account. For more information about compliance checks, see the *OpenText Active Catalogue Attributes Guide*.

GDS Network Attributes

Accounts interfacing with the GDS network generally use the GDSN filter as the default attribute filter when creating and viewing the GTIN information.

On the GTIN Detail page, the Classification attributes must be populated as described below.

Classification Agency	Classification Level 1 Value	Classification Level 2 Value	Trading Partner
UDEX - Udex values			
GPC - Global Product Classification			

The OpenText Active Catalogue attribute Classification Level 1 Value must be populated with *both* of the following values for data that will be sent into the GDS network.

- A UDEX classification value in XX.XXXX.XXXX format. The value must exist in the UDEX list of allowable values.
- A Global Product Classification (GPC) code in an 8-digit numeric format (XXXXXXXX). The value must be an acceptable GPC code.

For those vendors that utilized legacy UCCnet services in the past and previously assigned UDEX classification values to their items, the 1SYNC website contains a suggested mapping from UDEX to GPC. This is not a comprehensive list, but may be useful to some vendors who need assistance with the process. You must have a logon to the 1SYNC (UCCnet) Subscriber web site to access this page. The user ID and password information is provided by 1SYNC once you sign a subscription agreement with 1SYNC.

Multiline Attribute Tips

A multiline attribute can contain more than one value (for example, Country of Origin can contain up to three countries).

If an attribute can contain more than three values, it is identified by the presence of More next to the attribute name with the maximum number of possible values.

To open more lines in a multiline attribute

- 1 Click the **More** hyperlink to display additional fields for entering values. Click the hyperlink again to continue adding three additional fields until the maximum number of possible fields is reached.
- 2 Enter data by typing and/or selecting values from the drop-down lists.

Note: When updating a multiline attribute, the entire list is replaced, so be sure to send all of the values that are to appear in the updated list, not only new values.

Associated Multiline Attributes

Some multiline attributes are *associated*, which means one attribute is logically connected to another (for example, Ship From City and Ship From State or Province).

Use the following guidelines to work with these attributes:

- To view all the associated attributes, use the horizontal scroll bar at the bottom of the page, and/or hide the navigation panel.
 - Note:** The associated multiline values must occupy the same row (for example, Topeka and Kansas in the same row of Ship From City and Ship From State or Province). If a value is not possible in a row of an associated multiline attribute (for example, a state or province in China), leave it blank.
- Move your cursor over the attribute name to view the format requirements and definition of the attribute.
- For information about cost and price attributes, see ["Working With Costs and Prices" on page 166](#).
- Do not send duplicate values for Ship From Code.
- If an error occurs in an associated multiline attribute, an error message displays at the top of the page.

Working With Costs and Prices

Each row of Unit Cost and/or MSRP attributes includes:

- Unit Cost or MSRP numeric value
- Currency (required for Unit Cost and MSRP)
- Effective Date (optional unless otherwise noted)
- Expiration Date (optional)
- Trading Partner (to assign a private Unit Cost to a specific retailer)
 - Note:** The Trading Partner drop-down list includes only retailers with access to your catalogue.

Notes for working with costs and prices include the following:

- For Unit Cost and MSRP, use only a numeric value, not a currency symbol (for example, \$).
- Multiple *public* Unit Cost value/currency pairs are allowed per GTIN only if their active dates (determined by Unit Cost Effective Date and Unit Cost Expiration Date) do not overlap.
- Multiple private Unit Cost value/currency pairs *for the same retailer* are allowed per GTIN only if their active dates (determined by Unit Cost Effective Date and Unit Cost Expiration Date) do not overlap.
- If provided, an Expiration Date must follow the Effective Date in the same row.
- Private costs are visible only to the vendor and the specified retailer.

There are several reports you can run that provide information about how you and your trading partners use or access Catalogue data. The following reports are available:

- [“Analytics Report” on page 169](#)
- [“Compliance Report” on page 175](#)
- [“Item Search Ratio Report” on page 182](#)
- [“Load Status Report” on page 184](#)
- [“Trading Partner Access Report” on page 186](#)

Analytics Report

The Attributes Analytics Report was designed primarily for retailers to view their trading partners' accounts to see which attributes the vendors are populating for their items (GTINs). At the beginning of each month, the system takes a snapshot of all active vendors in Catalogue. The snapshot captures data for 203 attributes.

After the snapshot is taken, retailers can generate a report. The report is created as a CSV file and uses the retailer's access to a vendor's account to determine which vendors to include in the report.

This is the criteria for including a vendor's data in the report:

- If a vendor has granted any level of access to the retailer, the vendor's data is included in the file.
- If a vendor has totally restricted the retailer's access, the vendor's data is not included in the report.
- If a vendor grants any level of access to a retailer after the report has been run, the retailer can re-run the report and the vendor's data is added to the report.

The Attributes Analytics Report can also be run by a vendor. It includes only the vendor's own data and enables the vendor to see the attribute data that a retailer sees.

Topics are organized as follows:

- [“Requesting and Running an Attributes Analytics Report” on page 170](#)
- [“Downloading an Attributes Analytics Report” on page 171](#)
- [“Understanding Attributes Analytics Reports” on page 172](#)
- [“Deleting an Attributes Analytics Report” on page 175](#)

- "Setting Internet Explorer (IE) Options for Attributes Analytics and Compliance Reports" on page 187

Requesting and Running an Attributes Analytics Report

At the beginning of each month, the system takes a snapshot of all active vendors in Catalogue. The snapshot captures data for 202 attributes.

Important: Each multiline attribute is counted once per GTIN, regardless of how many multiline occurrences (values) there are for each multiline attribute. Only attribute counts for items that were added or updated after a specified date are included in the Attributes Analytics Report. The default date is 2016-01-01.

After a snapshot of vendor data is taken, you can request an Attributes Analytics Report based on a given snapshot date. Catalogue saves up to 12 monthly snapshots of data, allowing you to create reports that show attribute population rates over the course of a year.

When you request a report, it is created as a CSV file and uses the retailer's current access to a vendor's account to determine which vendors to include in the report. You can save the data as a CSV text file that can be displayed in another application such as MS Excel.

Note: If a retailer has been granted access to any vendors' accounts since the last time the report was run, those vendors are included in the report the next time the report is run.

1 To access the Attributes Analytics Report

2 Click **Administration > Attributes Analytics.**

The Attributes Analytics Reports - Results page opens.

<input type="checkbox"/>	Status	Snapshot Date	Report Run Date	Download
<input type="checkbox"/>	Complete	August 2015	07/30/2016 00:35:43	
<input type="checkbox"/>	Complete	September 2015	07/30/2016 00:29:42	

3 Click **Add.**

The Add Request for Attributes Analytics Reports opens.

[close](#)

Save Cancel

Snapshot Date: July 2016

- July 2016
- September 2015
- August 2015

4 From the Snapshot Date drop-down list, select the date for which you want to request attribute data.

5 Click **Save.**

You return to the Attributes Analytics Reports - Results page, and a message indicates that the report request was added successfully. The Status is New while the report is processing.

Attributes Analytics Reports - Results

Attributes Analytics Report Request was added successfully

<input type="checkbox"/>	Status	Snapshot Date	Report Run Date	Download
<input type="checkbox"/>	New	July 2016	07/30/2016 00:48:12	
<input type="checkbox"/>	Complete	August 2015	07/30/2016 00:35:43	
<input type="checkbox"/>	Complete	September 2015	07/30/2016 00:29:42	

- 6 Refresh the page to see if your report is complete (press **F5**).
- 7 Once the report is complete, you can download it. See ["Downloading an Attributes Analytics Report"](#) on page 171.

Downloading an Attributes Analytics Report

After an Attributes Analytics Report has run and processing is complete, it is available from the Attributes Analytics Reports - Results page.

You can save the report data to a CSV text file on your computer which can then be displayed in another application such as MS Excel.

Note: Be sure to set the required Internet Explorer options so you can successfully use this feature. See ["Setting Internet Explorer \(IE\) Options for Attributes Analytics and Compliance Reports"](#) on page 187.

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the data will not display.

To download an Attributes Analytics Report

- 1 Click **Administration > Attributes Analytics**.

The Attributes Analytics Reports - Results page opens.

Attributes Analytics Reports - Results

Attributes Analytics Report Request was added successfully

<input type="checkbox"/>	Status	Snapshot Date	Report Run Date	Download
<input type="checkbox"/>	New	July 2016	07/30/2016 00:48:12	
<input type="checkbox"/>	Complete	August 2015	07/30/2016 00:35:43	
<input type="checkbox"/>	Complete	September 2015	07/30/2016 00:29:42	

The list displays the results of all Attributes Analytics Reports that you have run. The most recent result is listed at the top of the list.

Note: When an administrator runs a report acting as a retailer or vendor, those reports also display on the page in that vendor's or retailer's account when they login.

The table displays from left for each Attributes Analytics Report:

- A check box to select a report for deletion from the list.
 - **Status**—Status of the report.
 - **New**—Data was requested but is not yet in the process of being retrieved.
 - **In Progress**—Data is in the process of being retrieved.
 - **Complete**—Data has been completely retrieved.
 - **In Error**—Data the system was not able to retrieve.
 - **Snapshot Date**—The date that the system takes a monthly snapshot of all active vendors in Catalogue. The snapshot captures data for 202 attributes.
 - **Report Run Date**—The date that the report was requested and processed.
 - **Download**—Download icon (click to download the report).
- 2** To find a result in the list:
- Scroll through the list.
 - Use the browse bar to move between pages.
- 3** To download the report, in the **Download** column, click the icon next to the report you want to download.
- A dialog box opens asking if you want to open the file or save it to your computer.
- 4** Do one of the following:
- Click **Open** to display the report data as a CSV text file. The text file can be saved as a CSV file and opened later with an application such as MS Excel. If the .csv extension is already associated with MS Excel, the data displays in Excel.
 - Click **Save** to save the file as a CSV text file that you can open later in an application such as MS Excel. Depending on your browser, the file may be saved to your Download folder. If the .csv extension is already associated with Excel, the file may be automatically saved as an MS Excel file.

Understanding Attributes Analytics Reports

The Attributes Analytics Report provides attribute data for 226 attributes for each item (GTIN) of a retailer's active trading partners (as long as they have some level of access to the vendor's account).

The following attributes are included in the report:

- Vendor Account Id
- Total GTINS
- GTIN Images
- Booking Date (Item Effective Date)
- Consumer Package Length
- Consumer Package Gross Weight
- GTIN Description
- Hazardous Material Class Code
- Material Country Of Origin
- NRF Size Code
- Refillable
- Special Item Code
- Unit Cost Effective Date
- Aerosol Y/N
- Consumer Item Width
- Adjustable Strap
- Beauty Area Of Use
- Bedding Type
- Boot Leg Circumference
- Bra Bust Type
- Bra Impact Level
- Bra Type
- Brand Name
- Collar Type
- Control Level
- Covered
- Dinnerware Category
- Earring Type
- Faux Fur Y/N
- Fill Material
- Formulation
- Fur - Country of Origination
- Gender By Age
- Hand Painted
- Handmade
- Headwear Crown
- Heel Height Range
- Holiday/Event
- Vendor Account Short Name
- Product Images
- Advertised Origin
- Color Description
- Size of Units in Consumer Package (Net Content)
- Consumer Package Width
- Discontinue Date
- Hazardous Material Description
- Manufacturer's Suggested Retail Price
- Minimum Order Quantity
- Seasonal Availability
- Trade Name
- Unit Cost Expiration Date
- Consumer Item Height
- Adhesive
- Bag Type
- Beauty Treatment Spec
- Benzoyl Peroxide Rest
- Boot Shaft Type
- Bra Cup Coverage
- Bra Padding
- Bra Underwire
- Closure
- Conference
- Convertible
- Cuff Type
- Dishwasher Safe
- Eyewear Type
- Feature / Benefit
- Finish
- FPLA Compliance Flag
- Fur - Treatment
- Gender
- Handbag Shoulder Drop
- Hat Type
- Headwear Fit
- Heel Material
- Hooded
- Snapshot Year Month
- Product Color Code Images
- Available Date
- Consumer Package Height
- Consumer Package Volume (Cube)
- CPSIA Certified Y/N
- Fabric Description
- Lead Time
- NRF Color Code
- Country of Origin
- Size Description
- Unit Cost
- Warranty Description
- Consumer Item Length
- Adjustable
- Band Type
- Bedding Size
- Bill Logo Application
- Bra Band Type
- Bra Cup Type
- Bra Specialty Type
- Bracelet Type
- Coat/Jacket Type
- Consumer Lifestage
- Cookware Type
- Detachable Strap
- Dress Type
- Fabric Or Material Code
- Fiber
- Flatware Type
- Fur - Animal Name
- Gauge
- Gold Karat
- Handle Strap
- Headwear Bill Type
- Heel Height
- Heel Type
- Hosiery/Sock Type

- Hypoallergenic
- Jewelry Type
- League
- Lined
- Material Group
- Metal Composition
- Short Product Marketing Message
- Number Of Settings
- Oil Free
- Outsole Type
- Pants/Shorts Type
- Platform Height
- Product Style
- Primary Detail Placement
- Primary Motif Theme

- Reversible
- Scent Type
- Secondary Detail Logo
- Secondary Detail Type
- Shaft Height
- Shoe Style
- Skirt Type
- Sleeve Measurement
- Sole Type
- Stay Cool Handle
- Stone Details
- Support Level
- Tag
- Third Detail Logo
- Third Detail Type
- Towel Type
- Waistband Type
- Wrinkle Resistant
- GTIN Extended Description
- Item Care Instructions
- Key Active Ingredient
- SPF Rating
- Asthma/Allergy Certified

- Insulated
- Knit Type
- Leg Type
- Lined Code
- Maternity
- Metal Feet
- Necklace Type
- Occasion List
- Open Closed Toe
- Padded
- Panty Back Coverage
- Player Name
- Primary Detail Application
- Primary Detail Size
- Prop 65 Warning

- Ring Type
- Seams
- Secondary Detail Placement
- Secondary Motif Theme
- Shape
- Shoe Type
- Sleepwear Type
- Slip Split
- Special Embellishment
- Steamable Y/N
- Strap Placement
- Sweater Pullover Type
- Team
- Third Detail Placement
- Third Motif Theme
- Marked Retail Price
- Watch Case Shape
- Brand Owner's Name
- Boxed For Gift Giving
- Harmonized Tariff Schedule
- List of Ingredients
- Special Handling Code
-

- Jewelry Sets
- Laser Cut
- Length Description
- Lining Material
- Metal
- Microwave Safe
- Neckwear Type
- Officially Licensed
- Order Quantity Multiple
- Pant/Inseam Length
- Panty Type
- Pocket Details
- Primary Detail Logo
- Primary Detail Type
- Proposition 65 Warning Description
- Rug Type
- Secondary Detail Application
- Secondary Detail Size
- Selling Channel
- Shapewear Type
- Skin Type
- Sleeve Length
- Slip Type
- Sport
- Stone
- Stretch
- Tableware Type
- Third Detail Application
- Third Detail Size
- Toe Shape
- Waist Rise
- Water Repellent
- Classification Level 1 Value
- Item Care Instructions Code
- Does Not Contain
- Active Ingredient
- Vendor Collection Name
-

Each row in the report represents a retailer’s trading partner (vendor). Only active trading partners are included in the report. The report displays the number of total GTINs in the vendor’s catalogue as well as the number of instances where a particular attribute is populated in that catalogue. Retailers can analyze data from a given report and they can also compare changes in data from month to month.

For example, in the report below, the catalogue of the vendor represented by the first row has a total of 660 GTINs and there are 660 instances where the color description attribute is populated.

Note: Vendors see only one row of their own data.

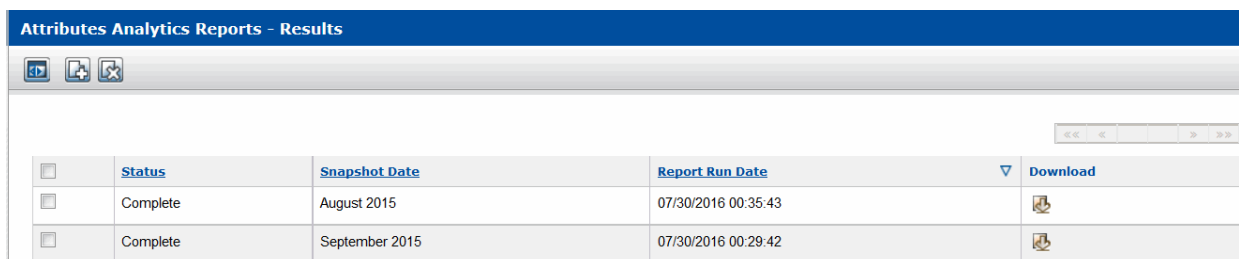
Snapshot Year Month	Total GTINS	Product Images	Product Color Code Images	GTIN Images	Advertised Origin	Available Date	Booking Date (Item Effective Date)	Color Description
Aug-16	660	0	0	0	0	0	0	660
Aug-16	13620	0	0	0	0	0	665	13620
Aug-16	2	0	0	0	0	0	0	2
Aug-16	2	0	0	0	0	0	0	2
Aug-16	198614	0	0	0	0	0	0	198614
Aug-16	81074	0	0	0	0	680	88	60880
Aug-16	2992	0	0	0	0	2992	0	2992
Aug-16	98304	0	0	0	0	0	0	98304
Aug-16	5420	0	0	0	0	0	0	5420
Aug-16	2	0	0	0	0	0	0	2
Aug-16	2	0	0	0	0	0	0	2
Aug-16	6749	0	0	0	0	0	0	6749
Aug-16	5114	0	0	0	0	0	0	5114
Aug-16	1068	0	0	0	0	0	0	1065
Aug-16	74019	0	0	0	0	0	0	74019
Aug-16	30601	0	0	0	0	8658	0	30601

Deleting an Attributes Analytics Report

To delete an attributes analytic report

- 1 Click **Administration > Attributes Analytics**.

The Attributes Analytics Reports - Results page opens.



- 2 Select the check boxes to the left of the reports you want to delete (click again to deselect).

- 3 Click **Delete** to remove the reports from the list.

Compliance Report

A Compliance Report is a one-time report run against the current state of data that exists within a catalogue. You can compare your catalogue to an attribute filter

that contains the specific attributes you require and obtain a report on the attributes that are not populated.

A compliance report allows you to test your own compliance as different retailers define it.

You can choose any of the following attribute filters when setting up a report to scan your catalogue for missing attribute values:

- Your own vendor account attribute filter
- Any retailer account attribute filter
- A system attribute filter

Note: You have the option to run the report for a specified Selection Code or Product.

Topics are organized as follows:

- [“Requesting and Running an Attribute Filter Compliance Report” on page 176](#)
- [“Downloading an Attribute Filter Compliance Report” on page 178](#)
- [“Understanding Attribute Filter Compliance Report” on page 179](#)
- [“Filtering the Attribute Filter Compliance Reports List” on page 181](#)
- [“Deleting an Attribute Filter Compliance Report” on page 181](#)
- [“Setting Internet Explorer \(IE\) Options for Attributes Analytics and Compliance Reports” on page 187](#)

Requesting and Running an Attribute Filter Compliance Report

You can request and run a compliance report that indicates whether there are missing (not populated) attribute values in your catalogue when it is compared to an attribute filter that contains the specific attributes you require.

To request and run a compliance report

- 1 Click **Data Management > Compliance Reports**.

The Compliance Reports page opens.

Compliance Reports								
Filter								
Status	Account Number	Account Name		Filter	Clear Filter			
<input type="checkbox"/>	Status	User ID	Account Number	Account Name	Start Date	End Date	Duration	Download
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:52:45.0	2014-01-30 16:52:45.0	0 sec	
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:51:15.0	2014-01-30 16:51:15.0	0 sec	

- 2 Click **Add**.

The Attribute Filter Compliance Report Request page opens.

- 3 The report will be run against your account. If needed, enter additional criteria to constrain the compliance report to a particular Selection Code or Product:
 - **Optional. Selection Code**—To run the report against a specific Selection Code, type a partial Selection Code (auto-fill field). Select a Selection Code from the drop-down list. If you enter a Selection Code that doesn't exist in the account, an error message displays.
 - **Optional. Product**—To run the report against a specific Product, type a partial Product (auto-fill field). Select a Product from the drop-down list. If you enter a Product that doesn't exist in the account, an error message displays.

Note: If you enter a **Product**, but leave the **Selection Code** field blank, Catalogue searches across all Selection Codes.
- 4 Select the type of attribute filter you want to run the report against:
 - **System Filter**—Maintained by OpenText Administrators
 - **Account Filter**—Created, maintained, and applied by users in the account

Once you select the type of filter, the drop-down list populates with all filters of that type.

For information about attribute filters and how to create account filters, see [Chapter 5, "Working with Attribute Filters," on page 68](#).
- 5 From the drop-down list, select an attribute filter to run the report against.
- 6 If needed, specify one or more of the following options:
 - **Maximum Attributes to Report**—Limits the number of attributes that are displayed in the report. To display all attributes, type **999**.
 - **Exclude items updated before**—Excludes from the report all items that were updated before the date you enter. Enter a date or click the **Auto Calendar** icon to select a date.
 - **Ignore discontinued items**—Select this check box if you do not want the report to display discontinued items.
- 7 Click **Save**.
You return to the Compliance Reports page, and a message indicates that the report request was added successfully. The Status is New while the report is processing.

8 Refresh the page to see if your report is complete (press **F5**).

Note: Compliance report processing times are limited to 20 minutes. If the report is not complete in 20 minutes, Catalogue stops processing the report, and an error message displays.

You can re-run the report and try one of the following:

- Limit the number the number of items in the report by specifying a particular Selection Code or Product when you request the report (Step 3).
- Specify an attribute filter that contains fewer attributes. Every attribute within the designated filter must be scanned, and this can significantly affect the performance of when running the compliance report.

9 Once the report is complete, you can download it. See ["Downloading an Attribute Filter Compliance Report" on page 178](#).

Downloading an Attribute Filter Compliance Report

Once a compliance report has been run and processing is complete, it is available from the Compliance Reports page.

You can view the report data or save it to a CSV text file on your computer.

Note: Be sure to set the required Internet Explorer options so you can successfully use this feature. See ["Setting Internet Explorer \(IE\) Options for Attributes Analytics and Compliance Reports" on page 187](#).

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the data will not display.

To download a compliance report

1 Click **Data Management > Compliance Reports**.

The Compliance Reports page opens.

<input type="checkbox"/>	Status	User ID	Account Number	Account Name	Start Date	End Date	Duration	Download
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:52:45.0	2014-01-30 16:52:45.0	0 sec	
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:51:15.0	2014-01-30 16:51:15.0	0 sec	

Note: The list displays the results of all compliance reports that you have run. The most recent result is listed at the top of the list. Reports are available for 14 days. After that, the report remains on the list, but you are not able to view it.

The table displays from left for each compliance report:

- Check box to select a report for deletion from the list.
- **Status**—Status of the report.
- **User ID**—The user identifier.
- **Account Number**—The account identifier.

- **Start Date**—Date and time the report started.
 - **End Date**—Date and time the report completed.
 - **Duration**—Time it took to run the report.
 - **Download**—Download icon (click to download the report).
- 2 To find a result in the list:
- Filter the list. See [“Filtering the Attribute Filter Compliance Reports List” on page 181](#).
 - Scroll through the list.
 - Use the browse bar to move between pages.
- 3 To download the report, in the **Download** column, click the icon next to the report you want to download.
- A dialog box opens asking if you want to open the file or save it to your computer.
- 4 Do one of the following:
- Click **Open** to display the report data as a CSV text file. The text file can be saved as a CSV file and opened later with an application such as MS Excel. If the .csv extension is already associated with MS Excel, the data displays in Excel.
 - Click **Save** to save the file as a CSV text file that you can open later in an application such as MS Excel. Depending on your browser, the file may be saved to your Download folder. If the .csv extension is already associated with Excel, the file may be automatically saved as an MS Excel file.

Understanding Attribute Filter Compliance Report

The Compliance Report is comprised of 3 parts:

- Header—Information about the accounts and attribute filter
- Body—Compliance information
- Footer—Attribute filter details at the time the report is run

Header

The report header lists information such as the requesting and target accounts and the attribute filter used. The header information follows the tag #ReportOptions.

For example:

```
#ReportOptions: requesting user=JCP3A;requesting
account=86111350007;target account=12510333555;selection code
filter=101;product name filter=none;item update date
filter=none;exclude discontinued items=false;date
format=MM/dd/yyyy; maximum attributes to report=10; account
attribute filter name=!IT JEANS Fil; attribute filter account
nbr=10036051840; attribute filter account name=!IT JEANS;
```

Header details include the following information:

- requesting user
- requesting account
- target account

- selection code filter
- product name filter
- item update date filter
- exclude discontinued items
- date format
- maximum attributes to report
- account attribute filter name
- attribute filter account nbr
- attribute filter account name

Body

The body of the report lists the compliance information.

For example:

selcode	product	gtin	gtin type	last update	unpopulated attributes
101	THISISATESTPRODUCT20	42428258585	UA	11/9/2012	Publication Date ; Set Pieces ;Additional attributes are non-compliant
101	AB101	42429258585	UA	1/3/2013	Order Sizing Factor ; Anti-Theft Device Attached, Y/N ;

Body details include the following information:

- Hierarchy information identifies the attribute that is unpopulated and has therefore, failed the compliance check (Selection Code, Product, GTIN, GTIN type, last update date)
- Unpopulated attributes lists the specific attributes that are missing for the GTIN based on the selected attribute filter.

Note: If the number of attributes was limited in the report options, and there were more unpopulated attributes compared to that limit, the message ‘Additional attributes are non-compliant’ appears. Limiting the number of attributes reported allows you to focus on small sets of attributes at a time. Another approach is to create a smaller attribute filter.

Footer

Footer details include the attribute filter details at the time the is report run. This information is included to eliminate confusion if the filter definition changes and the report is run again.

For example:

Attribute filter details: account attribute filter name=!IT JEANS Fil;
Attribute Group : Gdsn Optional Publication Date;Set Pieces;URL for Item Care Information;Recycle Type;Order Sizing Factor;Anti-Theft Device Attached, Y/N;
Attribute Group : Common Retail Prepack/Container Code;NRF Color Code;Color Description;Color Extended Description;NRF Size Code;Size Description;Unit Cost;Unit Cost Effective Date;Unit Cost Expiration Date;Unit Cost On Promotion, Y/N;Item On Promotion, Y/N;Seasonal Availability;Booking Date (Item Effective Date);Cancel Date;GTIN Description;

The footer is grouped into two sections:

- **#Attribute filter details**—Shows the selected attribute filter name

- **#Attribute Group**—Shows each attribute group within the selected filter, followed by the attributes within that group at the time the report is run. This section repeats for each attribute group in the filter.

Filtering the Attribute Filter Compliance Reports List

You can use the filter to display a list of compliance reports based on the criteria you specify.

To filter the compliance reports list

- 1 On the Compliance Reports page (**Data Management > Compliance Reports**), enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Status**—Select a status from the drop-down list to display only results with the specified status:
 - **New**—Show only those results for data that was requested but is not yet in the process of being retrieved.
 - **In Progress**—Show only results for data that is in the process of being retrieved.
 - **Complete**—Show only results for data that has been completely retrieved.
 - **In Error**—Show only results for data that the system was not able to retrieve.
 - **Account Number**—To show only results for a specified account identifier, type a partial or full account identifier in the text box.
 - **Account Name**—To show only results for a specified account name, type a partial or full account name in the text box.
- 2 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Deleting an Attribute Filter Compliance Report

To delete an attribute filter compliance report

- 1 Click **Data Management > Compliance Reports**.
The Compliance Reports page opens.

The screenshot shows the 'Compliance Reports' interface. At the top, there are icons for PDF, Print, and Refresh. Below is a 'Search' bar and a 'Filter' section with input fields for 'Status', 'Account Number', and 'Account Name', along with 'Filter' and 'Clear Filter' buttons. A table below displays two reports, each with a checkbox for selection.

<input type="checkbox"/>	Status	User ID	Account Number	Account Name	Start Date	End Date	Duration	Download
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:52:45.0	2014-01-30 16:52:45.0	0 sec	
<input type="checkbox"/>	Complete	KIBBLES	125103335555	KIBBLES N BITS	2014-01-30 16:51:15.0	2014-01-30 16:51:15.0	0 sec	

- 2 Select the check boxes to the left of the reports you want to delete (click again to deselect).

3 Click **Delete** to remove the reports from the list.

Note: Reports are available for 14 days. After that, the report is still listed, but you are not able to view it.

Item Search Ratio Report

The Item Search Ratio Report was designed primarily for retailers who want to know the number of times they are not able to find items (GTINs) in their vendors' catalogues. Since vendors may need to verify this information, you also have the ability to access this data.

Topics are organized as follows:

- ["Viewing the Item Search Ratio Report" on page 182](#)
- ["Filtering an Item Search Ratio Report List" on page 184](#)

Viewing the Item Search Ratio Report

Tracking and reporting for Item Search Ratio Report the begins at the time the report option is enabled. It must be enabled by OpenText Cloud Support Services (CSS).

Note: Tracking missed GTINs occurs only when the option is turned on. If the option is turned off, tracking stops. No history of tracking is available before the option is turned on or after the option is turned off.

This section is organized as follows:

- ["Overview for Retailers" on page 182](#)
- ["Overview for Vendors" on page 183](#)
- ["Accessing the Item Search Ratio Report" on page 183](#)

You can filter the data and also save the data as a CSV text file that can be copied to another application such as MS Excel.

To filter or copy the data from the report, see:

- ["Filtering an Item Search Ratio Report List" on page 184](#)
- ["Copying Report Data to a Table" on page 191](#)

Overview for Retailers

Each time you search a specific vendor's or distributor's catalogue (not a cross-catalogue search), Catalogue keeps track of the number of times you find and do not find the GTINs you are looking for.

The Item Search Ratio Report displays the actual number of hits (GTINs found) and misses (GTINs not found) for each vendor/distributor whose catalogue you have searched, as well as the hit and miss percentages.

Enabling the Report Option

The Item Search Ratio Report option must be enabled before data displays on the page. To enable the option, contact OpenText Cloud Support Services (CSS) at 1-800-334-2255.

After the report option is enabled for your account, data displays in the report, provided you have performed searches for GTINs from a specific vendor. Data does not display for a vendor if you have not searched their catalogue for GTINs.

Overview for Vendors

Each time your trading partners (retailers) search your specific catalogue (not a cross-catalogue search), Catalogue keeps track of the number of times they find and do not find the GTINs they are looking for.

The Item Search Ratio Report displays the actual number of hits (GTINs found) and misses (GTINs not found) for each trading partner that searched your catalogue, as well as the hit and miss percentages.

Enabling the Report Option

The Item Search Ratio Report option must be enabled before data displays on the page. To enable the option, contact OpenText Cloud Support Services (CSS) at 1-800-334-2255.

After the report option is enabled for your account, data displays in the report only if the trading partner also has the report option enabled and has performed searches for specific GTINs in your catalogue. Data does not display if a trading partner has not searched your catalogue for GTINs.

Accessing the Item Search Ratio Report

To access the Item Search Ratio Report

- 1 Click **Administration > Item Search Ratio Report**.

The Item Search Ratio Report page opens.

The report page may take several minutes to load; it is dependent on the number of trading partner accounts that were accessed.

The screenshot shows the 'Item Search Ratio Report' interface. At the top, there is a blue header with the title. Below the header, there are two icons: a play button and a refresh button. A 'Filter' section contains two input fields: 'Trading Partner Name' and 'Trading Partner Id'. Below these fields are two buttons: 'Filter' and 'Clear Filter'. The main content area displays a table with the following data:

Trading Partner Name	Trading Partner Id	Hits	Hit %	Misses	Miss %
GROCERY RETAILER	125109654730	3	27	8	73
RETAILER DEMONSTRATION	124154612042	7	47	8	53

In this example:

- The trading partner GROCERY RETAILER accessed your catalogue and searched for GTIN data 11 times (3 hits, (GTINs found) + 8 misses (GTINs not found)).
- The percentage of times the searches were successful is the hit percentage (Hit %) which is 27 (3/11).

- The percentage of times the searches were unsuccessful is the miss percentage (Miss %) which is 73 (8/11).

The results of this report only apply to GTIN searches for a specific vendor (the vendor must be specified at the time of the GTIN search). The results do not include cross-catalogue searches.

- 2 You can use the “Copy Data to Table” feature to view this data in a table or save the data as a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application, such as an Excel spreadsheet. See [“Copying Report Data to a Table” on page 191](#).

Filtering an Item Search Ratio Report List

You can filter the Item Search Ratio Report list based on the criteria you specify.

To filter an Item Search Ratio Report list

- 1 To view a list of the number of hits (GTINs found) and misses (GTINs not found) for each trading partner that searched your catalogue, click **Administration > Item Search Ratio Report**.

The Item Search Ratio Report page opens.

- 2 Locate the Filter bar.

- 3 Enter the criteria for each of the options you want to filter. You can filter on multiple options simultaneously.
 - **Trading Partner Name**—Enter a full or partial Trading Partner name.
 - **Trading Partner Id**—Enter a full Trading Partner ID.
- 4 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Load Status Report

The Load Status Report (LSR) is a report for vendors that is generated for each inbound EDI file sent to Catalogue:

- 832 - DLSR, data load status report

This report lists how many items in each EDI file were rejected, added, replaced, duplicated, moved, modified, and deleted.
- 888b - PLSR, profile load status report

This report lists how many total profile (access) changes were made for granting or revoking trading partnership access. The report also show what custom fields were populated, and with what values.

Each LSR is associated with the control number of the EDI document.

A vendor can request that an OpenText administrator enable LSRs for their account See [“Contacting Technical Support” on page 5](#).

After the LSR option has been enabled, the document number on the EDI Management Console List page is a hyperlink to the Load Status Report for that file (which can then be downloaded). See ["Using the EDI Management Console" on page 229](#).

Additionally, the OpenText administrator can enable an email option for your account so that the same LSR report is emailed to the primary contact listed on the Account Detail page. See ["Maintaining Your Account" on page 49](#).

Note: If you send in 50 EDI files, for example, you will receive 50 LSR emails.

Sample Catalogue Data Load Status Report for 832

This sample report shows the results data load status report for an 832.

```
ecCatalogue Update beginning for: KIBBLES on 2020-01-16 at 01:59:08
 1  GTIN RECORDS REJECTED (NOT PROCESSED)
 0  NEW GTIN RECORDS ADDED
 0  EXISTING GTIN RECORDS REPLACED
 0  EXISTING GTIN RECORDS DUPLICATED
 0  EXISTING GTIN RECORDS MOVED
 0  EXISTING GTIN RECORDS MODIFIED
 0  EXISTING GTIN RECORDS DELETED
 0  EXISTING GTIN RECORDS CANCELLED
==>Processing interchange : Control No. : 577163234
-->Processing envelope   : Control No. : 13
-->Version               : 004030
-->Processing Document   : Control No. : 130001 of type : 832
---> GTIN REJECTED : 520245101027 UA -- ERROR: A GTIN with passed Discontinue
Date cannot be maintained
ecCatalogue Update completed for : KIBBLES on 2020-01-16 at 01:59:08
```

Sample Catalogue Profile Load Status Report for 888b

This sample report shows the results of profile load status report for an 888b.

```
ecCatalogue Update beginning for : DPKEYSTO on 2020-01-28 at 06:28:44
39018 TOTAL PROFILE UPDATES PROCESSED
24311 PROFILE UPDATES ACCESS GRANTED
 0  PROFILE UPDATES ACCESS REVOKED
149  PROFILE UPDATES REJECTED DUE TO ERROR
14558 PROFILE UPDATES DUPLICATE
75322 RETAILER CROSS REFERENCE ADDED
 0  RETAILER CROSS REFERENCE DELETED
 0  RETAILER CROSS REFERENCE REJECTED DUE TO ERROR
2416  RETAILER CROSS REFERENCE DUPLICATE
==>Processing interchange : Control No. : 000003785
-->Processing envelope   : Control No. : 3785
-->Version               : 004030
-->Processing Document   : Control No. : 37850001 of type : 888
--->Granting Catalogue Access for retailer: GPC10157 Level: Product ID
Selection Code: 001 Product Id: 10107477
      Establishing Trading Partnership
      <Add successful>
--->Processing Retailer Cross Reference Record Type:P03 Attribute Type : ShipToName
Attribute Value : PAW PAW WINE DISTR KALAMAZOO
--->Adding retailer cross reference: 10107477 Level:
      <Add successful>
--->Processing Retailer Cross Reference Record Type:P03 Attribute Type : ShipToNumber
Attribute Value : 0021910541
--->Adding retailer cross reference: 10107477 Level:
      <Add successful>
--->Granting Catalogue Access for retailer: GPC10157 Level: Product ID
Selection Code: 001 Product Id: 10112573
```

Establishing Trading Partnership
<Add successful>
--->Processing Retailer Cross Reference Record Type:P03 Attribute Type : ShipToName
Attribute Value : PAW PAW WINE DISTR KALAMAZOO
--->Adding retailer cross reference: 10112573 Level:
<Add successful>

Trading Partner Access Report

The Trading Partner (TP) Access Report lists the trading partners who have accessed your catalogue in the last 3 months.

Topics are organized as follows:

- [“Viewing the Trading Partner \(TP\) Access Report” on page 186](#)
- [“Filtering a Trading Partner \(TP\) Access Report List” on page 187](#)

Viewing the Trading Partner (TP) Access Report

You can view a list of all trading partners who have accessed your catalogue in the last 3 months. For every trading partner who has accessed your catalogue in a particular month, you can see the last date that each of those trading partners accessed your catalogue in that month. You can filter the data and also save the data as a CSV text file that can be copied to another application such as MS Excel.

Note: You cannot view the TP Access Report unless you have been granted permission through your user role. Contact your system administrator to obtain permission.

To filter or copy the data from the report, see these sections:

- [“Filtering a Trading Partner \(TP\) Access Report List” on page 187](#)
- [“Copying Report Data to a Table” on page 191](#)

To access the Trading Partner Report

- 1 Click **Administration > TP Access Report**.

The Partner Access Report page opens.

Note: The report page may take several minutes to load; it is dependent on the number of trading partner accounts that were accessed.

The screenshot shows the 'Partner Access Report' interface. At the top, there is a blue header with the title 'Partner Access Report'. Below the header, there are navigation icons (back, forward, search). A 'Filter' section contains two input fields: 'Trading Partner Name' with the value 'GROCERY' and 'Trading Partner Id'. There are 'Filter' and 'Clear Filter' buttons. Below the filter section is a table with the following data:

Trading Partner Name	Trading Partner Id	Year	Month	Last Access Date
GROCERY RETAILER	125109654730	2012	May	May 1, 2012
GROCERY RETAILER	125109654730	2012	March	Mar 7, 2012
GROCERY RETAILER	125109654730	2012	January	Jan 31, 2012

In this example, the list has been filtered by the trading partner, GROCERY RETAILER. The last date that GROCERY RETAILER accessed your catalogue in the months of May, March, and January is displayed. The fact that no entries exist for April and February means that this retailer did not access your catalogue in those months.

You can use the “Copy Data to Table” feature to view this data in a table or save the data as a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application, such as an Excel spreadsheet. See the section, “Copying Report Data to a Table” on page 191.

Filtering a Trading Partner (TP) Access Report List

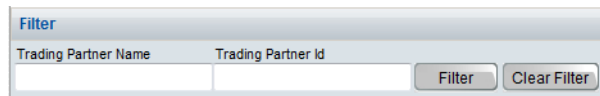
You can filter the Trading Partner (TP) Access Report list based on the criteria you specify.

To filter a Trading Partner Access Report list

- 1 To view a list of all trading partners who have accessed your catalogue, click **Administration > TP Access Report**.

The Partner Access Report page opens.

- 2 Locate the Filter bar.



- 3 Enter the criteria for each of the options you want to filter. You can filter on multiple options simultaneously.

- **Trading Partner Name**—Enter a full or partial Trading Partner name.
- **Trading Partner Id**—Enter a full Trading Partner ID.

- 4 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Setting Internet Explorer (IE) Options for Attributes Analytics and Compliance Reports

When analytics and compliance reports are downloaded, they open in a pop-up window:

To allow data download and pop-up functionality for this option, you need to set the following Internet options for Internet Explorer (IE):

- Add the secure URL for Catalogue to your IE trusted sites.
- Enable IE to prompt for file downloads.
- If you are using a pop-up blocker, add the secure URL for Catalogue to your IE pop-up blocker settings.

The following procedure describes how to set all of these options.

To set Internet Explorer options for downloading report data

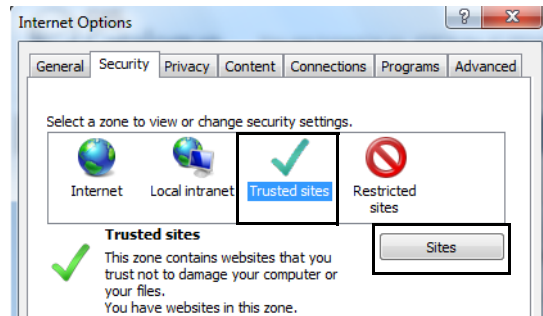
- 1 Access the Internet with Internet Explorer.
- 2 From the **Tools** menu, select **Internet Options**.

The Internet Options window opens.

3 Click the **Security** tab.

4 Under the **Select a zone to view or change security settings** section, click the **Trusted sites** icon.

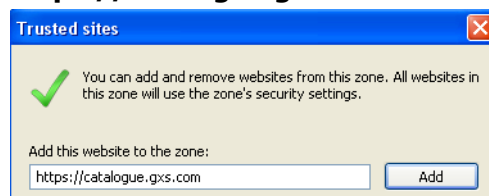
The Trusted sites zone displays.



5 Click **Sites**.

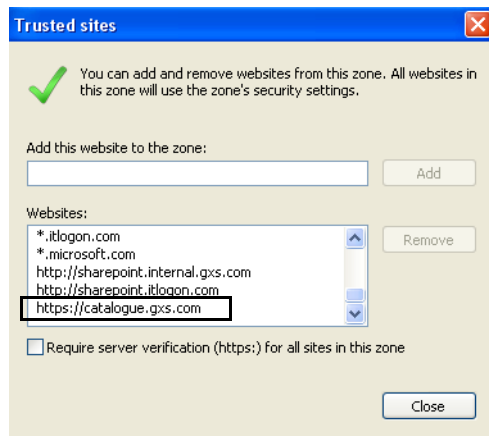
The Trusted sites window opens.

6 In the **Add this website to the zone** box, type the secure URL for Catalogue, **https://catalogue.gxs.com**.



7 Click **Add**.

The URL appears in the **Websites** box.

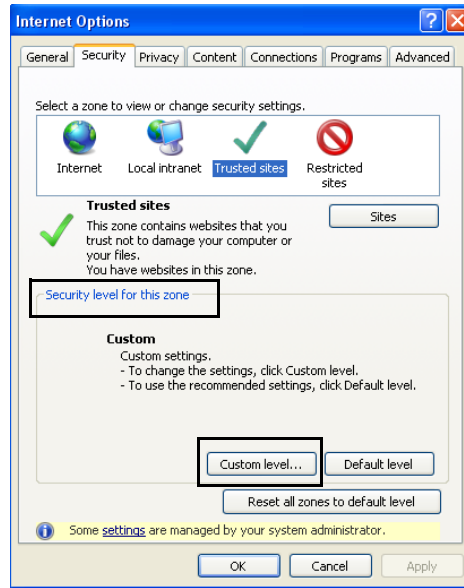


8 Click **Close**.

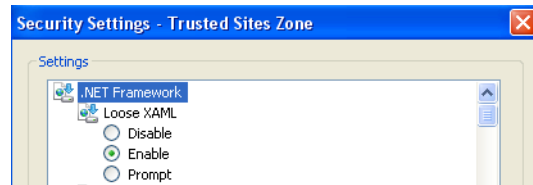
You return to the Internet Options window, **Security** tab.

9 If it is enabled, click **Apply** on the Internet Options window. If it is not enabled, continue to the next step.

10 Under the **Security level for this zone** section, click **Custom level**.

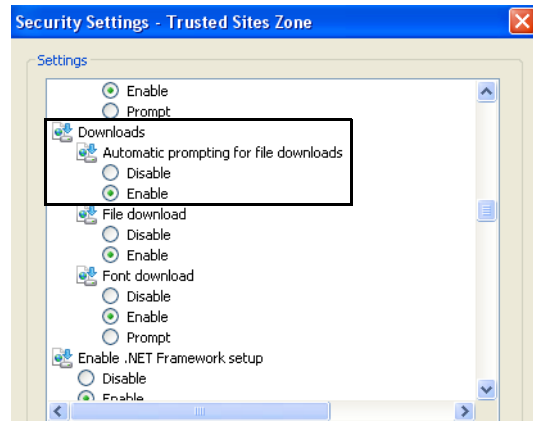


The Security Settings - Trusted Sites Zone window opens.



11 Scroll down to the **Downloads** section.

12 Under **Automatic prompting for file downloads**, select **Enable**.



13 Click **OK** at the bottom of the Security Settings - Trusted Sites Zone window. A warning dialog box opens, asking you to verify that you want to change the settings for this zone.

14 Click **Yes**.
 You return to the Internet Options window.

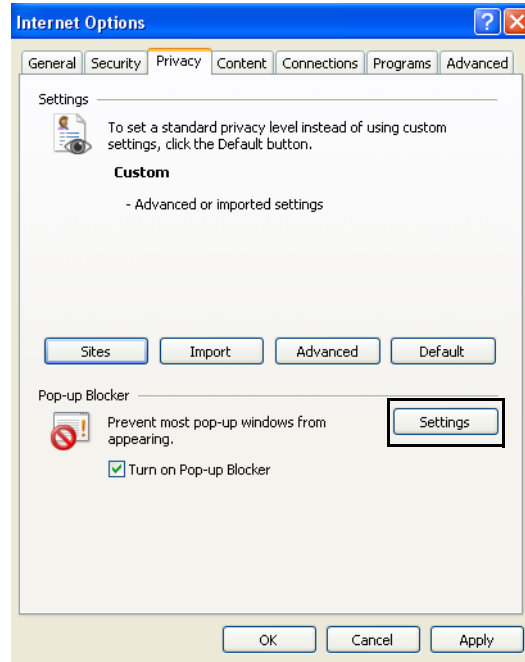
15 If it is enabled, click **Apply** on the Internet Options window. If it is not enabled, continue to the next step.

16 Do one of the following:

- If you are not using a pop-up blocker, you are done. Click **OK**.
You are now set up to download analytic and compliance reports.
- If you are using a pop-up blocker, continue to the next step to add the secure URL for Catalogue to your IE pop-up blocker settings.

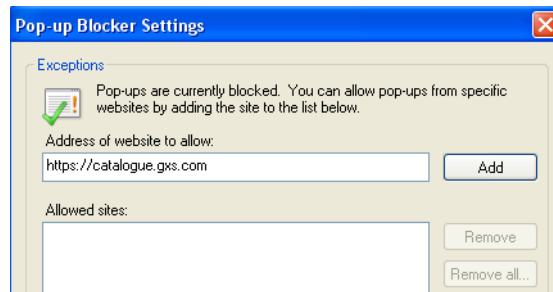
17 Click the **Privacy** tab.

18 In the **Pop-up Blocker** section at the bottom, click **Settings**.



The Pop-up Blocker Settings window opens.

19 In the **Address of website to allow** box, type the secure URL for Catalogue, **https://catalogue.gxs.com**, in the box.



20 Click **Add**.

The URL appears in the **Allowed sites** box.

21 Click **Close** on the Pop-up Blocker Settings window.

You return to the Internet Options window.

22 Click **OK** on the Internet Options window.

You are now set up to download analytic and compliance reports.

Copying Report Data to a Table

You can use the "Copy Data to Table" feature to copy data from the following reports to a table:

- Trading Partner (TP) Access Report (see "[Viewing the Trading Partner \(TP\) Access Report](#)" on page 186)
- Item Search Ratio Report (see "[Viewing the Item Search Ratio Report](#)" on page 182)

You can view the data in the table or save the data to a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application.

Note: Be sure to set the required Internet Explorer options so you can successfully use this feature. See "[Setting Internet Explorer \(IE\) Options for Copy Data to Table](#)" on page 98.

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data table will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the table will not display.

The Copy Data to Table icon appears on the button bar on the Partner Access Report and the Item Search Ratio Report pages.

To copy the report data

1 Click **Copy Data to Table** on one of the following pages:

- Trading Partner Access Report page (**Administration > TP Access Report**)
- Item Search Ratio Report page (**Administration > Item Search Ratio Report**)

A dialog box opens asking if you want to open the file or save it to your computer.

2 Do one of the following:

- Click **Open** to display the data in a table format such as MS Excel. After the table is open, you can select rows and columns of data to copy.

When you want to close the table, click the X in the upper right corner of the window. If you modified the table, you can choose to save your changes to your computer.

- Click **Save** to save the file to an application such as an MS Excel file. Depending on your browser, the file may be saved to your Download folder.

Opening a Downloaded CSV Text File in MS Excel

This topic describes how to work with a downloaded OpenText Active Catalogue text file within Microsoft Excel (MS Excel). The procedures step you through the

process of opening the text file in MS Excel so that the format of the GTINs, Selection codes, and Products is preserved.

Note: Catalogue creates a comma separated values (CSV) text file that has a .txt extension rather than a .csv extension. This allows you to open the text file in MS Excel and then set specific options so that the format of your data is preserved.

There are two methods for opening a text file in MS Excel:

- Using the MS Excel Text Import Wizard—see [“Using the MS Excel Text Import Wizard” on page 192](#)
- Using the Open With option from Windows Explorer—see [“Using the Open With Option from Windows Explorer” on page 195](#)

Using the MS Excel Text Import Wizard

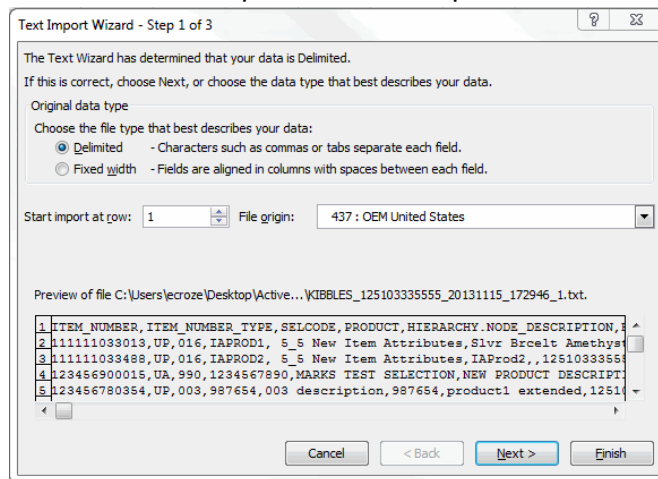
- 1 Open MS Excel.
- 2 From the **File** menu, select **Open**.
The Open window opens.

- 3 Navigate to the location of the text file (.txt extension).

Note: Next to the File name text box, be sure to select Text Files from the drop-down list so that all text files display.

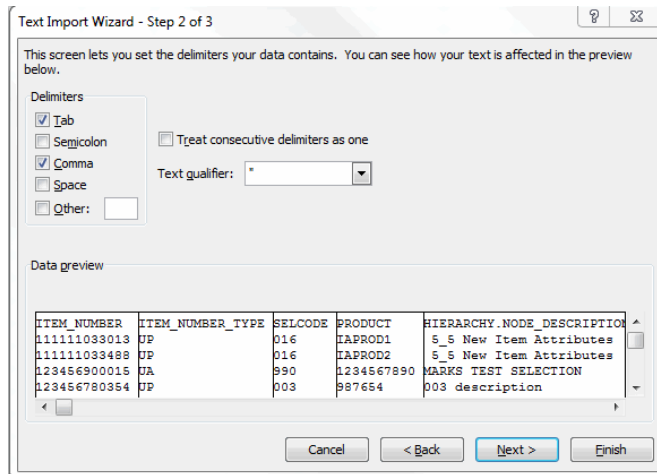
- 4 Select the file, and click **Open** or **Open Other Workbooks**.

MS Excel’s Text Import Wizard - Step 1 of 3 window opens.



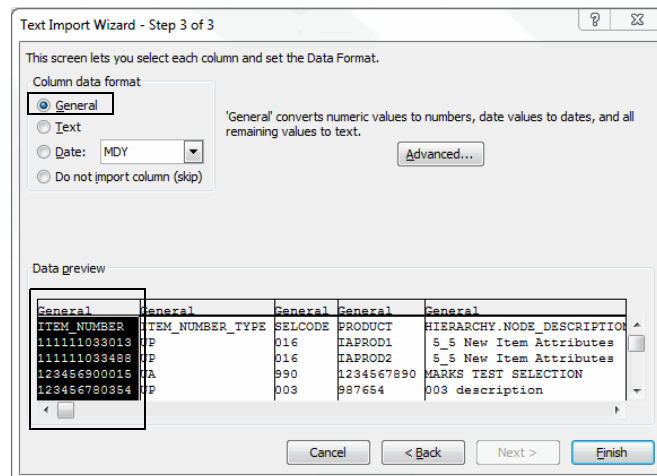
- 5 Select **Delimited** as the file type that best describes your data (how your data will be read).
- 6 Click **Next**.

The Text Import Wizard - Step 2 of 3 window opens.



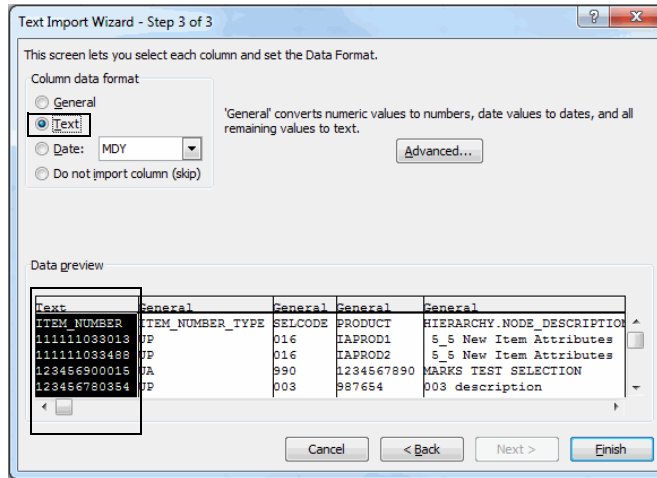
- 7 Be sure that the following options are set:
 - a Under Delimiters, select the **Tab** check box and the **Comma** check box. Make sure that all other check boxes are cleared.
 - b Clear the **Treat consecutive delimiters as one** check box.
 - c From the **Text qualifier** drop-down list, select the double quotes (").
- 8 Click **Next**.

The Text Import Wizard - Step 3 of 3 window opens

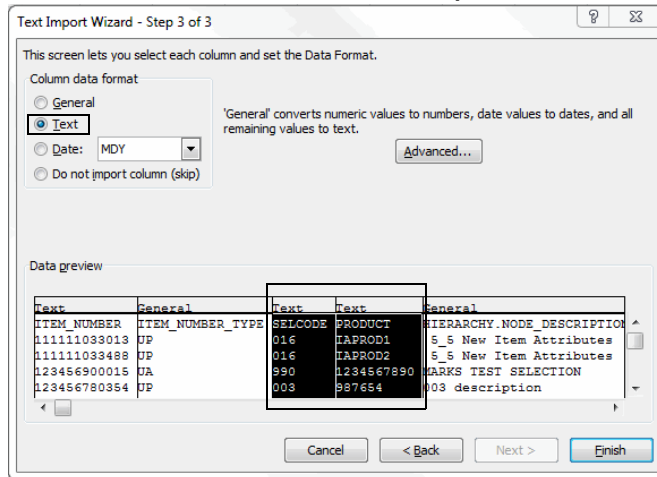


- 9 Select the first column (which contains the ITEM_NUMBER) by clicking the *General* column heading. The column highlights.
- 10 Under Column data format, select **Text**.

The column heading now reads *Text*.



- Repeat Steps 9 and 10 for the third and fourth *General* columns (which contain the Selection Code and Product data) to set them to a *Text* data format.



Note: Depending on the filter you selected, Private Account IDs associated with Unit Cost and MSRP also need to be set to a *Text* data format.

- Click **Finish**.

The downloaded data displays in Excel, and the format of the GTINs, Selection codes, and Products is preserved.

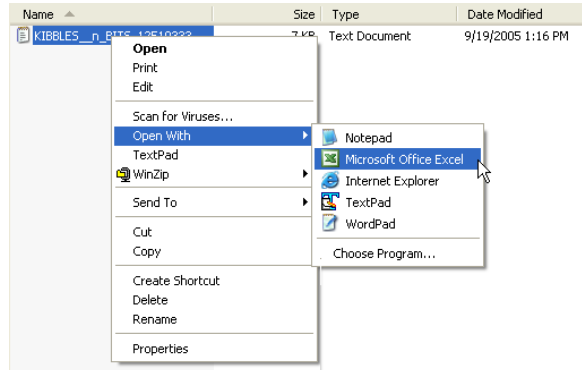
	A	B	C	D	E	F	G
1	ITEM_NUMBER	ITEM_NUMBER_TYPE	SELCODE	PRODUCT	HIERARCHY.NODE_DESCRIPTION	HIERARCHY.PRODUCT_DESCRIPTION	HIERARCHY.PRODUCT_DESCRIPTION.EXTENDED
2	111111033013	UP	016	IAPROD1	5_5 New Item Attributes	Slvr Brcelt Amethyst	
3	111111033488	UP	016	IAPROD2	5_5 New Item Attributes	IAProd2	
4	123456900015	UA	990	1234567890	MARKS TEST SELECTION	NEW PRODUCT DESCRIPTION	
5	123456780354	UP	003	987654	003 description	987654	product1 extended
6	123456780361	UP	003	987654	003 description	987654	product1 extended
7	123456780378	UP	003	987654	003 description	987654	product1 extended
8	123456780385	UP	003	987654	003 description	987654	product1 extended
9	123456780408	UP	003	987654	003 description	987654	product1 extended
10	123456780415	UP	003	987654	003 description	987654	product1 extended
11	123456780422	UP	003	987654	003 description	987654	product1 extended
12	123456780439	UP	003	987654	003 description	987654	product1 extended
13	123456780446	UP	003	987654	003 description	987654	product1 extended
14	123456780453	UP	003	987654	003 description	987654	product1 extended
15	963852590726	UP	003	987654	003 description	987654	product1 extended
16	555555003193	UP	003	1234-C	003 description	COTTON SOCKSS	

Note: To expand all columns to the width of the data within each column, highlight the entire spreadsheet by clicking on the upper left-hand corner of the spreadsheet, and then double-click on the line between any of the column headings.

Using the Open With Option from Windows Explorer

- 1 In Windows Explorer, navigate to the location of the text file.
- 2 Right-click on the file and select **Open With > Microsoft Office Excel**.

Note: Double-clicking on the file will open it in Notepad.



The downloaded data displays in Excel, but each line of data is stored in the first column.

- 3 Select the first column (A) by clicking on the **A** column heading.
- 4 From the **Data** menu, select **Text to Columns**. MS Excel's Text Import Wizard - Step 1 of 3 window opens.

Continue with Step 5 in the section, "Using the MS Excel Text Import Wizard" on page 192, and complete the remaining steps in that section. They will guide you through Excel's Text Import Wizard until the downloaded data displays in Excel.

Working with CSV Text Files to Upload Data

11

This section explains how to create a comma separated values (CSV) text file to upload small volumes of catalogue item or image data. Text file upload is useful for vendors with smaller catalogues who may have too many items to enter using the browser user interface (UI), but too few items to need the scalability of EDI or Web Services.

Note: Uploading physical images is discussed in [Chapter 9, "Maintaining Catalogue Data"](#) in these topics:

- ["Adding \(Uploading\) Physical Images to a Product"](#) on page 139
- ["Adding \(Uploading\) Physical Images to a GTIN"](#) on page 154

Topics include:

- ["Using Text File Upload"](#) on page 196
- ["Using a Downloaded Text File for a Text File Upload"](#) on page 197
- ["CSV Text File Format Rules for Catalogue"](#) on page 197
- ["Creating a CSV Text File from an MS Excel Spreadsheet"](#) on page 201
- ["Using a CSV Text File to Upload Data"](#) on page 204
- ["Correcting Errors in the CSV File"](#) on page 206

Using Text File Upload

Text file upload is a way to upload small amounts of Catalogue data using a CSV text file. For CSV text file upload, the following topics are relevant.

If you want to...	Use the following option:	See this topic:
Use a text file download file as a text file upload file	Not applicable	"Using a Downloaded Text File for a Text File Upload" on page 197
Review the guidelines for formatting a CSV text file.	Not applicable	"CSV Text File Format Rules for Catalogue" on page 197.
Create a CSV text file for the products or items you want to upload.	MS Excel or similar application	"Creating a CSV Text File from an MS Excel Spreadsheet" on page 201
Upload small volumes of catalogue item or image data using a CSV text file	Data Management > Text File Upload	"Using a CSV Text File to Upload Data" on page 204

If you want to...	Use the following option:	See this topic:
View a CSV text file using Notepad	Not applicable	"Viewing the CSV Text File in Notepad" on page 204
Correct Errors in a CSV text file	Data Management > Text File Upload	"Correcting Errors in the CSV File" on page 206
Open a Downloaded CSV text file in MS Excel	Not applicable	Chapter 12, "Working with Downloads." "Opening a Downloaded CSV Text File in MS Excel" on page 221

Using a Downloaded Text File for a Text File Upload

You can use a text file previously downloaded from Catalogue (TFD file) as the basis for a text file upload (TFU).

There are two things to keep in mind:

- The TFD file does not include an action column.

To use the TFD file as a TFU file, you need to add a column to the CSV text file that specifies the action you want to perform on each GTIN in the file (insert, update, replace, or delete).

- In the header row of the CSV text file, as the first entry, add the word *action*.
- In every subsequent row of data, specify the action you want to perform on that row's GTIN data (insert, update, replace, or delete)

You can add the column and corresponding information in the CSV text file or in the Excel file (before you save it as a CSV text file). Then upload the CSV text file using the UI.

For more information about creating a properly formatted CSV text file, see:

- ["CSV Text File Format Rules for Catalogue" on page 197.](#)
- ["Creating a CSV Text File from an MS Excel Spreadsheet" on page 201.](#)
- The TFD file includes three columns that will *not* be used when the file is used as a TFU file. The following three columns are ignored:
 - VENDORACCOUNT
 - CREATE_DATE
 - UPDATE_DATE

CSV Text File Format Rules for Catalogue

Understanding the format rules described below will enable you to produce an acceptable file you can upload to Catalogue using the browser interface.

Once you understand the rules, you can use one of many applications including MS Excel and MS Access to create an acceptable CSV text file.

Basics

The OpenText Active Catalogue CSV text file is self-describing data file. The first non-blank row is the header row and defines the attribute names and the order that they will appear throughout the rest of the file. The remaining non-blank rows contain the item data with one item per line, with attribute values appearing in the order defined in the header row.

Structure

The following sections describe the structure of the CSV text file.

Character Conventions

The CSV text file uses one line for each item of data. The lines can be separated by either line feed (ASCII 10) characters or a pair of carriage return (ASCII 13) and line feed characters.

The CSV text file separates fields on a line with a comma character. If a field value needs to contain a comma character, the whole field must be surrounded by double quotes (ASCII 34).

If a field needs to contain a quote character, it must be preceded by an additional quote character.

Required Attributes

Every CSV text file must include (at the minimum) the following fields:

- SELCODE
- PRODUCT
- ITEM_NUMBER
- ITEM_NUMBER_TYPE

These attributes identify the Catalogue item that will be changed. The following example is a simple file that inserts this item into the Catalogue:

```
ACTION,SELCODE,PRODUCT,ITEM_NUMBER,ITEM_NUMBER_TYPE,ITEM.DESCRPTION  
Insert,001,PID001,123412341551,UP,Item Description
```

Blank Rows

Catalogue ignores blank rows (all white space and no delimiters) in the CSV text file; however, blank rows are reflected in the line numbers used to report errors (they are counted as a row). In the example below, rows 1, 3, and 5 are blank rows. Rows 2, 4, and 6 are data rows. Row 2 is shown wrapping.

```
row 1  
row 2  ITEM.IDENTIFIER,ITEM.IDENTIFIER_TYPE,ITEM.PRODUCT,  
      ITEM.DESCRPTION,ITEM.ORIGIN_COUNTRY,ITEM.ORIGIN_COUNTRY  
row 3  
row 4  123456789012,UP,JEANS,DESIGNER BLUE,USA,MEX  
row 5  
row 6  123456789012,UP,JEANS,DESIGNER BLUE,USA,CAN
```

File Size

The CSV file can have a maximum number of 1000 data rows (blank rows are not counted).

Header Row

Header Fields

The first non-blank row is the header row. The fields in the header row are Active Catalogue attribute names. These names are case-insensitive and are in one of the following formats:

- The attribute name listed in the *OpenText Active Catalogue Attributes Guide* (for example, ITEM.COLOR_DESCRIPTION or ITEM.NRF_SIZE_CODE).
- The attribute name displayed on the Edit GTIN Details screen in the OpenText Active Catalogue application (for example, Color Description or Size Description)

Use the attribute name up to, but not including, the first comma that is displayed. Include parentheses when it is part of the name. See the examples in the following table.

Attribute Name Displayed on Edit GTIN Details Screen	Attribute Name Used in CSV Text File
Booking Date (Item Effective Date)	Booking Date (Item Effective Date)
Dangerous Goods Item, Y/N:	Dangerous Goods Item

Qualifying an Attribute Value

When an attribute requires a qualifier (either a UOM or Private Account ID), the field immediately following the attribute must contain the qualifier. The qualifier is identified as a colon followed by the qualifier (UOM or Private_Account_id).

UOM Example

In the CSV fragment below (the ellipses indicate that only part of the CSV text file is shown), Consumer Package Length has a UOM of inches (IN) and Consumer Package Gross Weight has a UOM of ounces (OZ).

```
...Consumer Package Length,:uom,Consumer Package Width,:uom,Consumer Package Height,:uom,Consumer Package Gross Weight,:uom,Consumer Package Volume (Cube),:uom ...10,IN,5,IN,2,IN,16,OZ,1.3,CF
```

Private Account ID Example

In the CSV fragment below, Unit Cost is an attribute that has a UOM qualifier of U.S. dollars (USD) as well as a Private Account ID qualifier of 123456789012. These qualifiers are followed by fields for the Unit Cost Effective Date and Unit Cost Expiration Date which are associated with the private cost values.

```
...Unit Cost,:uom,:Private_Account_id,Unit Cost Effective Date,Unit Cost Expiration Date ...80,USD,1234567890,1/1/2005,1/1/2006
```

Optionally, to clearly identify the attribute that is being qualified, you can repeat the name of the attribute before the colon of the qualifier, as shown in the CSV fragment below:

```
...Unit Cost,Unit Cost:uom,Unit Cost:Private_Account_id,Unit Cost Effective Date,Unit Cost Expiration Date ...80,USD,1234567890,1/1/2005,1/1/2006
```

Multiline Attributes

For each row in the CSV text file, multi-line attributes must appear as consecutive fields. In the following example, ITEM.ORIGIN_COUNTRY is the multi-line attribute and appears twice, one field next to the other.

```
ITEM.IDENTIFIER,ITEM.IDENTIFIER_TYPE,ITEM.PRODUCT,ITEM.DESCRPTION,ITEM.ORIGIN_COUNTRY,ITEM.ORIGIN_COUNTRY
123456789012,UP,JEANS,DESIGNER BLUE,USA,MEX
123456789012,UP,JEANS,DESIGNER BLUE,USA,CAN
```

Data Rows

Missing Values

A data row contains values for the fields defined in the header row. If an item does not have a value for the corresponding field, it can be left blank. This should appear in the CSV text file as a repeated delimiter. Trailing commas are needed for missing values at the end of a row.

Note: Since empty fields are allowed, it is not possible to remove a specific attribute value from an item using the update action. Use the replace action to remove attributes values.

For example, the following CSV text file does not have a value for the first ITEM.ORIGIN_COUNTRY field. The missing value is accounted for by the repeating commas.

```
ITEM.IDENTIFIER,ITEM.IDENTIFIER_TYPE,ITEM.PRODUCT,ITEM.DESCRPTION,
ITEM.ORIGIN_COUNTRY,ITEM.ORIGIN_COUNTRY
123456789012,UP,JEANS,DESIGNER BLUE,,MEX
```

Quoted Values

If a value needs to contain the delimiter character (for example: DESIGNER, BLUE), the corresponding field in the CSV text file needs to be surrounded by double quotes ("DESIGNER, BLUE"). If the value contains a quote character, the quote character must be preceded by another quote character.

For example, DESIGNER, "BLUE" needs to appear in the CSV text file as "DESIGNER, ""BLUE""".

```
ITEM.IDENTIFIER,ITEM.IDENTIFIER_TYPE,ITEM.PRODUCT,ITEM.DESCRPTION,ITEM.ORIGIN_COUNTRY,ITEM.ORIGIN_COUNTRY
123456789012,UP,JEANS,"DESIGNER, ""BLUE""",,MEX
```

Excess Data Values

A data row cannot contain more data values than you have defined in the header row. If it does, the line will generate an error and be ignored.

Action Field

You can use a field to specify the action of a row (insert, update, replace, or delete). The following rules apply:

- If you use a field to specify an action, and you specify insert for an existing item, the system will generate an error.
- If you use a field to specify an action, and you specify *update* or *replace* for a non-existent item, the system will generate an error.

- If you do not use a field to specify an action, the system uses the appropriate action to load the data into Catalogue (it inserts an item if there is no existing item and updates an item if it already exists).
- If you specify *replace* for an existing item, the item is updated only with the attributes specified in that data row. Attributes for the item that are omitted from the data row are removed from the existing item. The item has a new delta time stamp but its create time stamp is preserved. All of the item attributes have a new delta time stamp.
- Selection Code, Selection Code description, Product, and Product description can only be created using text file upload; you cannot update these fields using text file upload.
- Text file upload supports implied Product delete; that is, if you use a CSV text file to delete the last item in a Product, the Product will be deleted.

Hierarchy Creation

Catalogue will automatically create a Selection Code/Product hierarchy from the values provided in the CSV text file as long as all the necessary values are present. For Catalogue to create the hierarchy, the CSV text file must contain values for the Selection Code (selcode), Selection Code description (hierarchy.node_description), Product (product), and Product description (hierarchy.product_description).

If the hierarchy does not yet exist, Catalogue will create the hierarchy.

Note: If the hierarchy already exists, Catalogue will *not* update the existing values with the values in the CSV text file.

Creating a CSV Text File from an MS Excel Spreadsheet

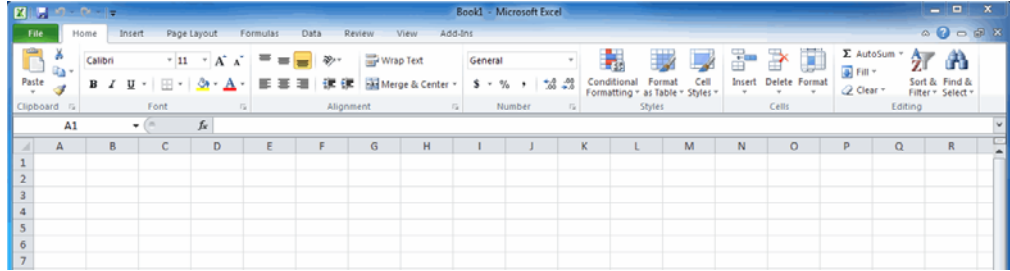
The steps in the following table describe how to create a CSV text file from an MS Excel spreadsheet.

Your CSV text file must conform to the CSV format specifications described in "[CSV Text File Format Rules for Catalogue](#)" on page 197. Data loaded using a CSV text file must conform to your configured compliance checks and basic GTIN attribute validations and rules.

Step	See this section
1. Create a basic MS Excel spreadsheet structure.	"Create a Basic MS Excel Spreadsheet Structure" on page 202.
2. Apply a text format to attributes values that appear numeric, but must be shown as text.	"Apply MS Excel Formats to Attribute Values" on page 202.
3. Enter your data in the spreadsheet, one item per row.	"Enter Data into the Spreadsheet" on page 203.
4. Save the spreadsheet as an MS Excel (.xlsx) file (to retain full data information).	"Save Your Spreadsheet as an MS Excel File" on page 203.
5. Save the spreadsheet as a CSV text file.	"Save Your Spreadsheet as a CSV Text File" on page 203.
6. View the CSV text file in Notepad or a similar text editor.	"Viewing the CSV Text File in Notepad" on page 204.

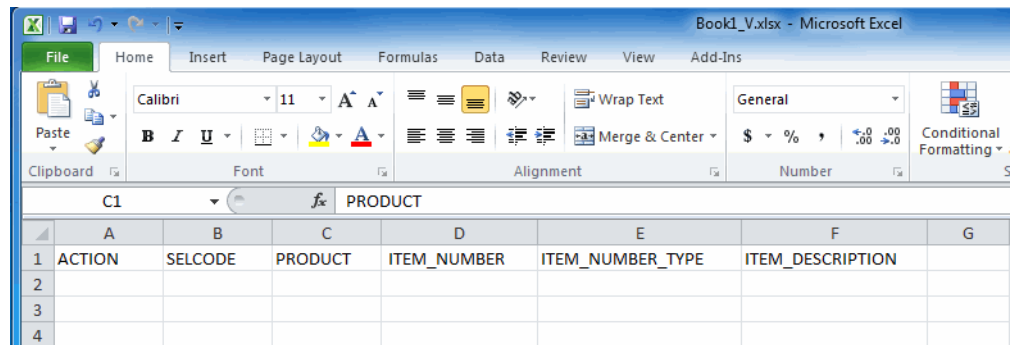
Create a Basic MS Excel Spreadsheet Structure

- 1 Open MS Excel.
- 2 From the **File** menu, select **New**.
- 3 Select **Blank workbook**. A blank worksheet displays.



- 4 Create a header row by typing attribute names into row 1 of the spreadsheet. The header row must contain the mandatory fields SELCODE, PRODUCT, ITEM_NUMBER, and ITEM_NUMBER_TYPE.

For a complete list of attribute names, please refer to the *OpenText Active Catalogue Attributes Guide*.



Apply MS Excel Formats to Attribute Values

Apply a text format to the columns of attributes that appear numeric but must be shown as text.

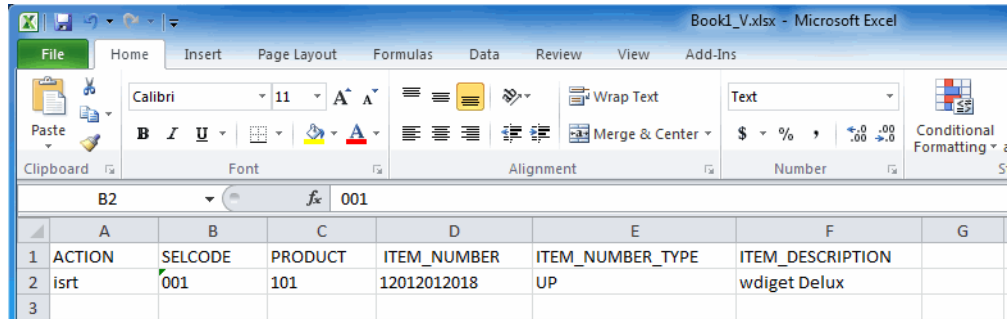
MS Excel interprets the values in the columns; if they appear to be numeric, it removes leading zeros and may display the value in exponential format. This will cause problems in the CSV text file because all of the characters are important in attributes such as Selection Codes, Products, and GTINs. To prevent numbers from being truncated, these cells must be formatted as text.

- 1 On the spreadsheet you created above, select the following columns: SELCODE, PRODUCT, and ITEM_NUMBER (use Ctrl-click to select multiple columns).
- 2 Right-click on a cell and select **Format Cells**.
- 3 Click the **Number** tab and select **Text** from the Category list.
- 4 Click **OK**.

The text format is applied to the selected columns.

Enter Data into the Spreadsheet

Enter your data into the spreadsheet using one row for each item. Enter the value for each attribute below the corresponding attribute name in the header row.



Save Your Spreadsheet as an MS Excel File

Save the spreadsheet as an MS Excel (.xlsx extension) file.

- 1 From the **File** menu, select **Save As**.
The Save As window opens.
- 2 Navigate to the location where you want to save the file.
- 3 In the **File name** box, type the name of your file using a .xlsx extension.
- 4 In the **Save as type** box, select the file type **Microsoft Office Excel Workbook (*.xlsx)** from the drop-down list.

Note: It is critical to save the data using a .xlsx spreadsheet format before you save the file as a CSV text file (.csv extension). If you do not do this, the CSV text file may lose critical information.

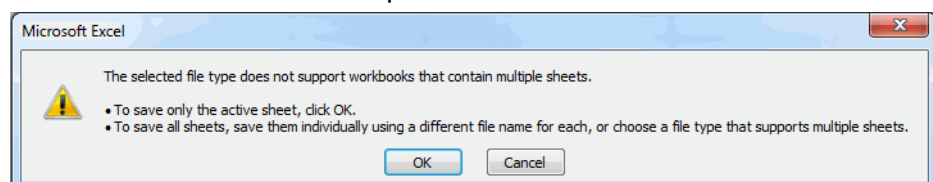
- 5 Click **Save**.
The MS Excel file is saved.

Save Your Spreadsheet as a CSV Text File

Save the spreadsheet as a CSV text file. This is the file that will be uploaded to OpenText Active Catalogue.

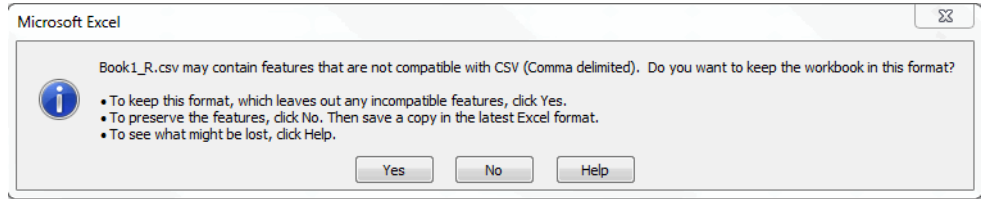
- 1 From the **File** menu, select **Save As**.
The Save As window opens.
- 2 In the **File name** box, type the name of your file using a .csv extension.
- 3 In the **Save as type** box, select the file type **CSV (Comma delimited)(*.csv)** from the drop-down list.
- 4 Click **Save**.

MS Excel displays a warning dialog box as it saves the spreadsheet data into the more restrictive comma separated format:



5 Click **OK**.

Another warning dialog box displays:



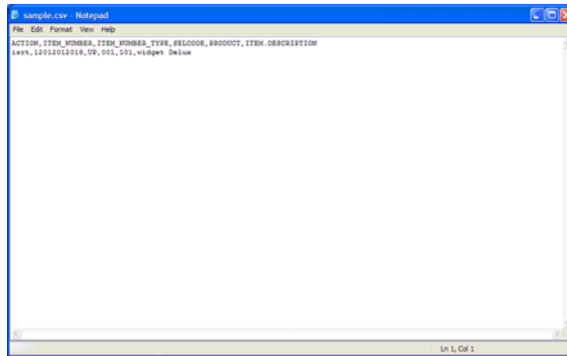
6 Click **Yes**.

The CSV text file is saved.

Viewing the CSV Text File in Notepad

You can view the CSV text file in Notepad or a similar application.

1 To open the CSV text file in Notepad, right-click on the file and select **Open With Notepad**.



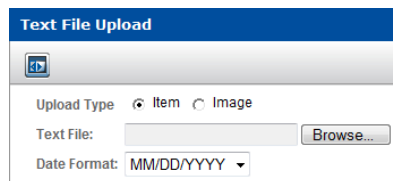
This file can be uploaded into OpenText Active Catalogue by selecting **Data Management > Text File Upload**. See [“Using a CSV Text File to Upload Data” on page 204](#).

Using a CSV Text File to Upload Data

To use a CSV text file to upload data

1 Click **Data Management > Text File Upload**.

The Text File Upload page opens.



2 Select one of the following types for the data you want to upload:

- Item—select to upload item attributes
- Image—select to upload product or item image attributes

3 Click Browse.

The Choose file dialog box opens.

4 Navigate to the CSV text file you want to upload, select it, and click Open.

The path to the file displays in the Upload File box.

5 From the Date Format drop-down list, select the date format used in the text file you are uploading.

6 Click Process to upload the file.

A message indicates that the file is processing. When the upload is complete, the Text File Upload—Results page displays the results of the upload.

Every record is treated individually. If a file has 100 records, and there are 5 errors, then 95 records were successfully processed.

For records that were not uploaded successfully, the errors in the text file are displayed. See the section, [“Correcting Errors in the CSV File” on page 206](#) for details about how to correct the errors and resubmit the file.

The screenshot shows the 'Text File Upload - Results' page. At the top, there is a warning icon and the text 'There are errors in the file.' Below this, the following information is displayed: File Name: C:\Users\croze\Desktop\Active Catalogue 5.6 (March 2014)\Main_UG\text file upload sample csv files\Item_TFU_Failure2.csv, File Size: 586, Date Format: 1, Total Lines: 3, Error Lines: 3, Success Lines: 0, Lines Processed: 3. A table below lists the errors:

Line Number	Item Number	Item Type	Error Code	Error Message
2	521112551121	UA	-90029	Item already exists. If this item is not in your catalogue, it may already be owned by another manufacturer.
3	521114551124	UA	-20505	Item Number not found
4	526212551125	UA	-20505	Item Number not found

The header displays:

- **File Name**—the name of the file
- **File Size**—the size of the file
- **Date Format**—the date format used in the file:
 - 1=MM/DD/YYYY
 - 2=DD/MM/YYYY
 - 3=YYYY-MM-DD
- **Total Lines**—the total number of lines in the file that can potentially be processed (does not include the header or any commented lines).
- **Lines Processed**—the total number of lines that were actually processed. A subset of Total Lines since some lines may not have met validation requirements (for example, mandatory elements are missing). These errors are considered validation errors, and the lines are not processed. Each line is validated prior to processing it.
- **Error Lines**—the number of lines that generated an error *during* processing. Validation errors are not included.
- **Success Lines**—the number of lines that were successfully processed.

- To upload another file, click **Data Management > Text File Upload** to return to the Text File Upload page where you can browse for and upload additional files.

Correcting Errors in the CSV File

If the text file you uploaded contained errors, they display on the Text File Upload—Results page as soon as processing is complete. If you navigate away from this page, you will no longer be able to see the errors.

Note: Items that upload successfully can be downloaded using the Download process. See [“Downloading Data” on page 208](#).

The screenshot shows the 'Text File Upload - Results' page. At the top, there is a blue header with the text 'Text File Upload > Text File Upload - Results'. Below the header, there is a warning icon and the text 'There are errors in the file.' Below this, there is a summary of the file upload: 'File Name: C:\Users\ecroze\Desktop\Active Catalogue 5.6 (March 2014)\Main_UG\text file upload sample csv files\Item_TFU_Failure2.csv File Size: 586 Date Format: 1 Total Lines: 3 Error Lines: 3 Success Lines: 0 Lines Processed: 3'. Below the summary, there is a table with the following columns: 'Line Number', 'Item Number', 'Item Type', 'Error Code', and 'Error Message'. The table contains one row of error data:

Line Number	Item Number	Item Type	Error Code	Error Message
2	521112551121	UA	-90029	Item already exists. If this item is not in your catalogue, it may already be owned by another manufacturer.

The table displays the line number of the error in your text file, the item number, the item type, the error code, and an error message. Correct the errors in your text file before uploading the file again.

To correct an error

- In your CSV text file, locate the line number that corresponds to the line number of the error displayed on the Text File Upload—Results page.
- Use the error message to determine what the error is.
- Correct the error. For information about preparing and formatting a CSV text file for upload, see [“CSV Text File Format Rules for Catalogue” on page 197](#).
- Save the CSV text file and upload it again using the procedure, [“Using a CSV Text File to Upload Data” on page 204](#).

Note: If the text file was partially loaded, you should create a new file containing only the lines in error. This prevents Catalogue from generating additional errors and updating (and therefore, charging for) items that have already been successfully changed.

This section describes how to download catalogue data and images:

- **Downloading Data**—Topics describe how to select and download catalogue data (including image attributes) on a one-time (ad hoc) basis using the following methods:
 - Batch file download
 - Text file download (including opening a downloaded CSV text file in Excel).
- **Downloading Images**—Topics describe how to select and download physical images.

This section is organized as follows:

- “Downloading Data” on page 208
 - “Overview” on page 208
 - “Batch Download Process” on page 208
 - “Text File Download Process” on page 209
- “Downloading Selection Codes” on page 210
- “Downloading Products” on page 210
- “Downloading GTINs” on page 210
- “Viewing the Download Basket” on page 211
- “Deleting Records from the Download Basket” on page 212
- “Completing a One-Time Batch File Download” on page 212
- “Completing a One-Time Text File Download” on page 214
- “Deleting Text File Download Results” on page 219
- “Finding a Text File Download Result” on page 220
 - “Filtering the Text File Download Results List” on page 220
- “Opening a Downloaded CSV Text File in MS Excel” on page 221
- “Downloading Images” on page 225
 - “Downloading Product Images” on page 225
 - “Downloading GTIN Images” on page 226

Downloading Data

This section explains how to select and download catalogue data on a one-time (also called ad hoc) basis using one of the following download processes:

- “Batch Download Process” on page 208.
- “Text File Download Process” on page 209.

To request a full catalogue download, contact OpenText Cloud Support Services (CSS). See “Contacting Technical Support” on page 5.

Note: Multiple Users—It is possible for multiple users to log in to Catalogue using the same user ID; however, if you intend to use the download feature, we recommend that each user have their own personal user ID. When a download is actually created, Catalogue views multiple sessions as one user, potentially causing confusion for the users about the data that is or isn’t received in their download. Additional user IDs can be obtained by contacting OpenText Cloud Support Services (CSS). See “Contacting Technical Support” on page 5.

Overview

There are two download methods for obtaining data on a one-time basis:

- **Batch file download**—Catalogue allows you to download data to your electronic mailbox. The data can be exported in the following ways:
 - **EDI format to your electronic mailbox**—This is the default method. Catalogue sends the data to your electronic mailbox in EDI format.
 - **qXML format to your electronic mailbox on Inovisworks**—This method requires some set up to be performed by OpenText Cloud Support Services (CSS), and is only available to customers who use Inovisworks as their VAN. See “Contacting Technical Support” on page 5.

Note: These methods are not limited to one-time downloads. Once they are set up, they apply to all exported data.

- **Text file download**—Catalogue allows you to download data directly to your desktop as a text file. This is a two-stage process that allows you to access the retrieved data multiple times.

In the first stage, you select items using the download basket, and Catalogue retrieves your data and stores it.

In the second stage, you download the data using different options to create a text file that you can save to your computer. Text files can be opened in an application such as MS Excel which allows you to view and manipulate the data. See “Opening a Downloaded CSV Text File in MS Excel” on page 221.

Batch Download Process

The batch download process consists of these steps:

- 1 Find Selection Codes, Products, GTINs, or image attributes to download, and place them in the download “basket.”
- 2 View the download “basket” to verify your selections.

- 3 Select the attribute filter, download method (Batch File), information type (Product, GTIN, or Media) and type of schedule (Immediate or Overnight).
Note: The system limits Immediate downloads to one million items or less. If downloads are greater than one million, the system forces the Overnight option to go into effect. Overnight downloads of more than 5 million items must be broken into multiple downloads.
- 4 Complete the download by clicking **Finish**.
Note: The download basket is emptied when you exit the application, so complete all steps before logging out.

Text File Download Process

The text file download process consists of these steps:

- 1 Find Selection Codes, Products, GTINs or image attributes to download, and place them in the download "basket."
 - 2 View the download "basket" to verify your selections.
 - 3 Select the attribute filter and download method (Text File).
 - 4 Initiate the retrieval of data from Catalogue. At this point, Catalogue retrieves your data and stores it.
 - The text file format will be item-oriented and include the Selection Code and Product for each item.
 - GTIN components will be in a separate file from the GTIN export file (in the same zip folder)
 - Image attributes will be in a separate file from the GTIN export file (in the same zip folder).
 - The system limits a single text file download to 250,000 items; an error message displays if you exceed the limit. You cannot complete the download until the number of items is below 250,000.
- Note:** Text File Downloads usually begin within 1 minute. However, at peak times, it may take up to 1 hour for your Text File Download to begin.
- 5 View the text file download results. Select the results from which to create the text file.
 - 6 (Optional) Select options that determine how the data is generated in the text file.
 - 7 Download the data to create a text file.

The download basket is emptied when you exit the application, however, Catalogue stores the retrieved data so that you can select different options to create numerous text files to suit your purpose. Each time you log in, you can return to the text file download results, select a download result, select options that determine how the data is generated in the text file, and create a new text file that can be saved to your computer.

Note: You are billed only when the download basket is processed (the data is retrieved from Catalogue, Step 4), not when the data is downloaded to create a text file (Step 7).

Downloading Selection Codes

To download Selection Codes

- 1 Find the Selection Code to download. See ["Finding Selection Codes" on page 77](#).
- 2 In the column to the left of the Selection Codes, click one or more check boxes to choose Selection Codes to download. (Click a box again to deselect.)
- 3 After choosing Selection Codes, click **Download** to add them to the download basket.
- 4 Do one of the following:
 - To download more Selection Codes, go to Step 1.
 - To download Products, see ["Downloading Products" on page 210](#).
 - To download GTINS, see ["Downloading GTINS" on page 210](#).
 - To continue with the next step in the download process, go to ["Viewing the Download Basket" on page 211](#).

Downloading Products

To download Products

- 1 Find the Product to download:
 - See ["Finding Products Across Selection Codes" on page 80](#).
 - See ["Finding Products Under One Selection Code" on page 82](#).
- 2 On a Product list page, in the column to the left of the Product, click one or more check boxes to select Products to download. (Click a box again to deselect.)
- 3 After choosing Products, click **Download** to add them to the download basket.
- 4 Do one of the following:
 - To download more Products, go to Step 1.
 - To download Selection Codes, see ["Downloading Selection Codes" on page 210](#).
 - To download GTINS, see ["Downloading GTINS" on page 210](#).
 - To continue with the next step in the download process, go to ["Viewing the Download Basket" on page 211](#).

Downloading GTINS

To download GTINS

- 1 Find the GTIN to download:
 - See ["Finding GTINS Across Selection Codes" on page 88](#).
 - See ["Finding GTINS Under One Product" on page 90](#).

- 2 On a GTIN list page, in the column to the left of the GTIN, click one or more check boxes to select GTINs to download. (Click a box again to deselect.)
- 3 After choosing GTINs, click **Download** to add them to the download basket
Note: On the GTIN Details page, click **Download** to add the GTIN to the download basket.
- 4 Do one of the following:
 - To download more GTINs, go to Step 1.
 - To download Selection Codes, see ["Downloading Selection Codes" on page 210](#).
 - To download Products, see ["Downloading Products" on page 210](#).
 - To continue with the next step in the download process, go to ["Viewing the Download Basket" on page 211](#).

Viewing the Download Basket

You can view the contents of the download basket before completing the download.

To view the contents of the download basket

- 1 Click **Catalogue > Download Basket**. The Download Basket page opens.

<input type="checkbox"/>	Trading Partner	Selection Code	Selection Code Description	Product	GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Products	GTINs	Images
<input type="checkbox"/>	KIBBLES n BITS	001	Creamy Kibbles									9	13	0
<input type="checkbox"/>	KIBBLES n BITS	002	002SelCode									3	7	0
<input type="checkbox"/>	KIBBLES n BITS	003	Sel Code new									27	0	0
<input type="checkbox"/>	KIBBLES n BITS	099	shoe samples									4	353	0

- 2 The table displays from left for each record in the download basket:
 - Check box to select a record for deletion from the basket.
 - **Trading Partner**—The vendor’s name
 - **Selection Code**—The Selection Code identifier
 - **Selection Code Description**—The description of the Selection Code
 - **Product**—The Product identifier if the record is a Product or GTIN (blank for Selection Code)
 - **GTIN**—The GTIN identifier
 - **GTIN Type**—The GTIN type. See ["GTIN Number Structures" on page 256](#).
 - **Pack**—The container type or component designation. See ["Container/Component Designation Codes" on page 258](#).
 - **Color**—The GS1 US color code
 - **Color Description**—The color description
 - **Size**—The GS1 US size code

- **Size Description**—The size description
 - **Products**—The number of Products under the Selection Code if the record is a Selection Code (blank for Products and GTINs).
 - **GTINs**—The number of GTINs under the Selection Code or Product if the record is a Selection Code or Product (blank for GTINs).
 - **Image**—The number of images associated with the Product (if the record is a Product) or GTIN (if the record is a GTIN). Regardless of whether a retailer has access to the Selection Code or Product, all images are counted at the Product and GTIN level. Images under Selection Codes or Products that the retailer does not have access to will not be downloaded or billed.
- 3** Do one of the following:
- If you want to delete a record from the download basket, see [“Deleting Records from the Download Basket” on page 212](#).
 - If you have verified your selection and are ready to continue with a batch file download, go to [“Completing a One-Time Batch File Download” on page 212](#).
 - If you have verified your selection and are ready to continue with a text file download, go to [“Completing a One-Time Text File Download” on page 214](#).

Deleting Records from the Download Basket

You can delete records from the download basket. This may be necessary because a record contains too many items, contains incorrect items, or contains items that are not text file download compatible.

To delete records from the download basket

- 1** Click **Catalogue > Download Basket**. The Download Basket page opens. See [“Viewing the Download Basket” on page 211](#).
- 2** In the column to the left of the Trading Partner, select the check boxes of the records you want to remove from the Download Basket (click again to deselect).
- 3** Click **Delete** to remove the records from the basket.

Completing a One-Time Batch File Download

To complete a one-time batch file download

- 1** From the Download Basket page, (see [“Viewing the Download Basket” on page 211](#)), in the column to the left of the Trading Partner, select the check boxes of the records you want to download (click again to deselect).
 - 2** Click **Download**.
- Note:** All of the selected records in the download basket will be downloaded.

The Complete Data Download page opens.

3 From the **Attribute Filter** drop-down list, select a filter to restrict the export of GTIN attributes

4 Select **Batch File** as your download method. Catalogue will send data to your electronic mailbox. The data is exported in EDI format.

Note: This option is only available if “EDI Support: Outbound from Catalogue” is enabled for your account. To contact technical support for assistance, see [“Contacting Technical Support” on page 4](#).

5 Select one or more Information Types to indicate the type of data to download for the selected records. For records at the Selection Code or Product level, you can specify Product and/or GTIN Information Types. For records at the GTIN level, you can specify GTIN Information Types.

- **Products**—Product attributes (and Selection Code Description above each Product).

- **Product Media**—Product image attributes including:

- Product image attributes for any “generic” Product image (that is, the Product image has no color code associated with it)
- Product image attributes plus the color code associated with that Product image

Note: Only Product *image attributes* are downloaded using the Download Basket. To download Product *physical images*, see [“Downloading Product Images” on page 225](#).

- **GTINs**—GTIN attributes (and the Product and Selection Code Descriptions above each GTIN).

- **GTIN Media**—GTIN image attributes (and the Product image attributes for the Product images that are above each GTIN and meet the following criteria):

- Product image attributes for any “generic” Product image (that is, the Product image has no color code associated with it)
- Product image attributes plus the color code associated with that Product image, for those Product images whose color code is the same as the color code of the GTIN.
- GTIN image attributes for any GTIN image

Note: Only GTIN *image attributes* are downloaded using the Download Basket. To download GTIN *physical images*, see “[Downloading GTIN Images](#)” on page 226.

6 Select when to download from Catalogue:

- **Immediate**
- **Overnight**

Note: The system limits Immediate downloads to one million items or less. If downloads are greater than one million, the system forces the Overnight option to go into effect. Overnight downloads of more than 5 million items must be broken into multiple downloads.

- 7** The total number of Products and GTINs (items) that you have requested for download is displayed. This number may be greater than the actual number of Products and GTINs that are downloaded since only those Products and GTINs that you have access to are downloaded.
- 8** To confirm that you understand that you will be billed for downloading this data, select the check box, “I understand that Data Download is a billable action.”
- 9** Click **Finish** to complete the download.

Completing a One-Time Text File Download

To complete a one-time text file download

- 1** From the Download Basket page, (see “[Viewing the Download Basket](#)” on [page 211](#)), in the column to the left of the Trading Partner, select the check boxes of the records you want to download (click again to deselect).
- 2** Click **Download**.

Note: All of the selected records in the download basket will be downloaded.

The Complete Data Download page opens.

- 3 From the **Attribute Filter** drop-down list, select a filter to restrict the export of GTIN attributes. The attributes that are exported become the column headers when you open the resulting text file as a CSV file (using an application such as Excel).
- 4 Select **Text File** as your download method. You are limited to 250,000 GTINs in one text file.
- 5 (Optional) To include component attributes in the download file, select **Include Components**. Component attributes for the exported GTINS will be included for all records that were in the download basket.
Note: A GTIN can have two levels of components; a GTIN can have components (first level of components), and the components can have components (second level of components).
 Currently, it is not possible to add a GTIN to the download basket and download two levels of components for that GTIN. To achieve this scenario, you must add the GTIN to the download basket and then add the first level component GTINs to the download basket. Since Catalogue downloads components for all GTINs in the download basket, both levels of components are downloaded.
- 6 (Optional) To include image attributes in the download file, select **Include Image Attributes**. Image attributes for the exported GTINS will be included for all records that were in the download basket.
- 7 The total number of Products and GTINs (items) that you have requested for download is displayed. This number may be greater than the actual number of Products and GTINs that are downloaded since only those Products and GTINs that you have access to are downloaded.
- 8 To confirm that you understand that you will be billed for downloading this data, select the check box, "I understand that Data Download is a billable action."

- Click **Finish**. Catalogue retrieves the selected data and stores it. Once Catalogue begins the process of retrieving the data, the download basket is empty.

Note: The system limits a single text file download to 250,000 items; an error message displays if you exceed the limit. You cannot complete the download until the number of items is below 250,000.

- To check the status of the data retrieval, click **Data Management > Text File Download**. The Text File Download—Results page opens.

Once the data retrieval is complete, it is available from this page (even after you log out and log back in) and can be downloaded multiple times to create text files without incurring additional charges.

The screenshot shows the 'Text File Download - Results' interface. At the top, there is a 'show labels' link. Below it is a 'Filter' section with a dropdown for 'Status', input fields for 'User Id', 'Start Date' (with a date format 'MM/DD/YYYY'), and 'End Date' (with a date format 'MM/DD/YYYY'). There are 'Filter' and 'Clear Filter' buttons. Below the filter is a table with the following data:

<input type="checkbox"/>	Status	User Id	Account Id	Start Date	End Date	Duration	Download
<input type="checkbox"/>	Complete	KIBBLES	125103335555	10/10/07 12:46:59	10/10/07 12:47:43	44 sec	
	In Progress	KIBBLES	125103335555	03/03/07 22:51:59			
	In Progress	KIBBLES	125103335555	03/03/07 22:49:59			

The list displays the results of all text file downloads that you have initiated in the last 15 days. The most recent result is listed at the top of the list. After 15 days, a text file download result is automatically deleted from this list.

The table displays from left for each result in the list:

- Check box to select a result for deletion from list.
 - **Status**—Status of the data retrieval from Catalogue.
 - **User Id**—The user identifier.
 - **Account Id**—The account identifier.
 - **Start Date**—Date and time that data retrieval started.
 - **End Date**—Date and time that data retrieval completed.
 - **Duration**—Time it took to retrieve the data.
 - **Download**—Download icon (click to download the data to create a text file).
- To find a result in the list:
 - Filter the list. See “[Filtering the Text File Download Results List](#)” on page 220.
 - Scroll through the list.
 - Use the browse bar to move between pages.
 - To create the text file, in the **Download** column, click the icon next to the results from which you want to create the text file. The Text File Download—

Options page opens. On this page, you can set options that determine how the data is generated in the text file.

Text File Download - Options

Attribute Filter	JCPenney Attributes
Total Items	1
Maximum Elements	12
Total Elements	995

All attributes
 Limit multiline occurrences

<input style="width: 90%;" type="text" value="2"/>	Country of Origin (0 of 3)
<input style="width: 90%;" type="text" value="2"/>	Dangerous Goods Regulation Agency/Code (0 of 5)
<input style="width: 90%;" type="text" value="2"/>	Hanger Type (0 of 3)
<input style="width: 90%;" type="text" value="2"/>	Hazardous Material Class Code (0 of 5)
<input style="width: 90%;" type="text" value="2"/>	Manufacturer's Suggested Retail Price (0 of 100)
<input style="width: 90%;" type="text" value="4"/>	Unit Cost (0 of 100)

13 Select one of the following options:

- **All Attributes**—The text file will generate all attributes (including blank columns, for example, from multiline attributes that contain no data). Go to Step 16.
- **Limit Multiline occurrences**—The text file will generate a specified number of multiline attributes. Go to Step 14.

14 To limit the number of multiline occurrences you want generated in the text file, type a number for each multiline attribute to indicate the number of occurrences you want to see.

Note: The multiline attributes displayed on this page are determined by the attribute filter you selected for this request on the Complete Data Download page.

The numbers displayed to the right of each multiline attribute (for example, 2 of 3) are represented as follows:

- The first number indicates that at least one item in the file has the indicated number of multiline occurrences (for example, 2) for that attribute.
- The second number indicates the maximum number of occurrences that are allowed for that attribute (for example, 3).

For example, Country of Origin (2 of 3) indicates that at least one item in the file has two Country of Origin occurrences out of a possible three Country of Origin occurrences allowed for that attribute.

The ability to display a limited number of multiline occurrences in a text file is designed to support applications that can handle a limited number of items (for example, MS Excel does not support more than 256 columns of data).

15 Click **Save**.

The Download button displays in the upper-right corner of the page.

Note: Even if you do not make any changes to the default limits that are shown, you must click **Save**; this action causes the Download button to display.

16 Click **Download** to initiate the file download. The File Download dialog opens.

17 Do one of the following:

- Click **Open** to view the files. The file is downloaded as a zip file. You must unzip the file to view it.

The file opens as a text file. See ["Opening a Downloaded CSV Text File in MS Excel" on page 221](#) for information about working with the OpenText CSV format within MS Excel.

- Click **Save** to save the file to your computer. The Save As dialog opens. Type a file name in the File name text box and click **Save**. The file is saved to your computer as a zip file. You must unzip the file to view it.




The file opens as a text file. See ["Opening a Downloaded CSV Text File in MS Excel" on page 221](#) for information about working with the OpenText CSV format within MS Excel.

- Click **Cancel** to cancel the download and return to the Text File Download—Options page.

If you selected Include Components, the zip file contains a file for the GTINs you selected and a separate file for the GTIN's components. The component's file can be identified by "comp" in the filename.

If you selected Include Image Attributes, the zip file also contains a separate file for the image attributes. The image file can be identified by "img" in the filename.

The corresponding file names are correlated by the user ID, account ID, and date and time of data retrieval.

Name	Type	Date modified	Size	Ratio
 KIBBLES_125103335555_20190828_003003_0.txt	Text Document	8/28/2019 12:31 AM	5 KB	77%
 KIBBLES_125103335555_20190828_003003_comp_0.txt	Text Document	8/28/2019 12:31 AM	1 KB	14%
 KIBBLES_125103335555_20190828_003003_img_0.txt	Text Document	8/28/2019 12:31 AM	1 KB	47%

When you open the text file as a CSV file (using an application such as Excel), the column headers are displayed as follows:

- In the main file, the column headers are the attributes determined by the Attribute Filter and multiline options you selected for the download.
- In the component file, the column headers are the following attributes:
 - VENDORACCOUNT
 - SELCODE
 - PRODUCT
 - COMPONENT_ITEM
 - CONTAINER_ITEM
 - QTY
 - UOM
 - PREPACK_FLAG
- In the image file, the following attributes are included in the export:
 - Image Level

- Vendor Account ID
- Selcode
- Product
- Item Number
- Color Code
- File Name
- File Type
- Image Type
- Purpose
- Orientation
- Location Type
- External Location
- File Size
- Pixel Density (DPI)
- Height
- Width
- Image Style
- Facing (GDSN)
- Angle
- Clipping Path
- Image Description
- Physical Image (Y/N)

Note: The download basket is emptied when you exit the application; however, Catalogue stores the data in a temporary location. This data is available so that you can apply different options to create numerous text files to suit your purpose. Each time you log in, you can return to the Text File Download—Results page, select a previous data result, apply options to the data, and create a new text file that can be saved to your computer.

Deleting Text File Download Results

To delete text file download results

- 1 Click **Data Management > Text File Download**. The Text File Download—Results page opens.
- 2 Select the check boxes to the left of the results you want to remove (click again to deselect).
- 3 Click **Delete** to remove the results from the list.

Note: After 15 days, a text file download result is automatically deleted from this list.

Finding a Text File Download Result

To find a text file download result

- 1 Click **Data Management > Text File Download**. The Text File Download—Results page opens.

<input type="checkbox"/>	Status	User Id	Account Id	Start Date	End Date	Duration	Download
<input type="checkbox"/>	Complete	KIBBLES	125103335555	10/10/07 12:46:59	10/10/07 12:47:43	44 sec	
<input type="checkbox"/>	In Progress	KIBBLES	125103335555	03/03/07 22:51:59			
<input type="checkbox"/>	In Progress	KIBBLES	125103335555	03/03/07 22:49:59			

- 2 (Optional) To filter the list, see [“Filtering the Text File Download Results List” on page 220](#).
- 3 Do one of the following:
 - To create the text file, in the **Download** column, click the icon next to the results from which you want to create the text file. The Text File Download—Options page opens. Continue with Step 13 in the section, [“Completing a One-Time Text File Download” on page 214](#).
 - To delete a download result, in the column to the left of the Status column, select the check boxes of the results you want to remove (click again to deselect). Click **Delete** to remove the results from the list.

Filtering the Text File Download Results List

You can use the filter to display a list of download results based on the criteria you specify.

To filter the text file download results list

- 1 On the Text File Download—Results page (**Data Management > Text File Download**), enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Status**—Select a status from the drop-down list to display only results with the specified status:
 - **New**—Show only those results for data that was requested but is not yet in the process of being retrieved.
 - **In Progress**—Show only results for data that is in the process of being retrieved.
 - **Complete**—Show only results for data that has been completely retrieved.
 - **In Error**—Show only results for data that the system was not able to retrieve.
 - **User Id**—To show only results for a specified user Id, type a partial or full user Id in the text box.

- **Start Date**—Show only results for data that was retrieved with on or after a specified start date. Type a date using the format set for your account (for example, MM/DD/YYYY), or click **Auto Calendar** and select a date.
 - **End Date**—Show only results for data that was retrieved on or after a specified end date. Type a date using the format set for your account (for example, MM/DD/YYYY), or click **Auto Calendar** and select a date.
- 2 Click **Filter**. The list that meets your criteria displays.
Note: To remove all filter criteria, click **Clear Filter**.

Opening a Downloaded CSV Text File in MS Excel

This topic describes how to work with a downloaded OpenText Active Catalogue text file within Microsoft Excel (MS Excel). The procedures step you through the process of opening the text file in MS Excel so that the format of the GTINs, Selection codes, and Products is preserved.

Note: Catalogue creates a comma separated values (CSV) text file that has a .txt extension rather than a .csv extension. This allows you to open the text file in MS Excel and then set specific options so that the format of your data is preserved.

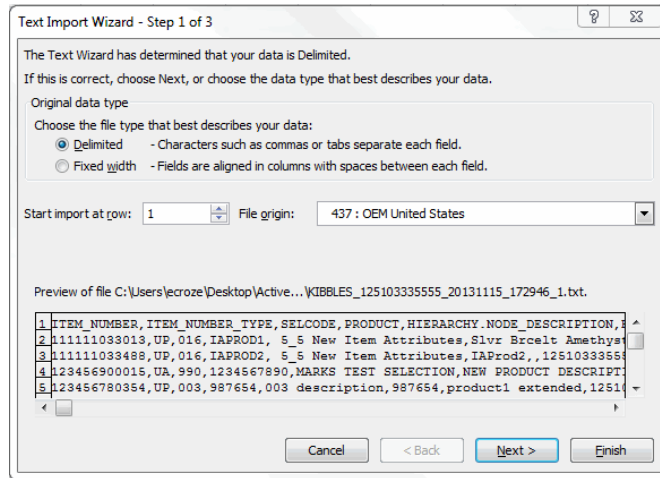
There are two methods for opening a text file in MS Excel:

- Using the MS Excel Text Import Wizard—see [“Using the MS Excel Text Import Wizard” on page 221](#)
- Using the Open With option from Windows Explorer—see [“Using the Open With Option from Windows Explorer” on page 224](#)

Using the MS Excel Text Import Wizard

- 1 Open MS Excel.
- 2 From the **File** menu, select **Open**.
The Open window opens.
- 3 Navigate to the location of the text file (.txt extension).
Note: Next to the File name text box, be sure to select Text Files from the drop-down list so that all text files display.
- 4 Select the file, and click **Open** or **Open Other Workbooks**.

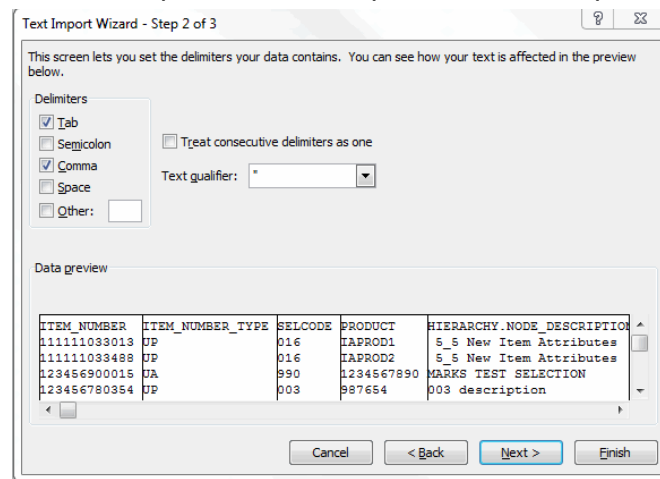
MS Excel's Text Import Wizard - Step 1 of 3 window opens.



5 Select **Delimited** as the file type that best describes your data (how your data will be read).

6 Click **Next**.

The Text Import Wizard - Step 2 of 3 window opens.

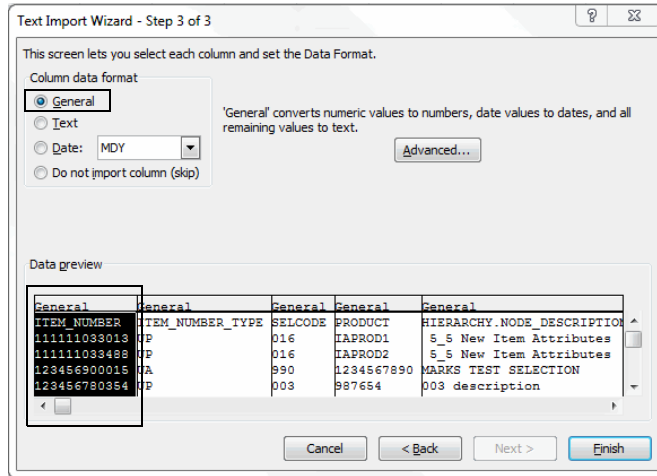


7 Be sure that the following options are set:

- a Under Delimiters, select the **Tab** check box and the **Comma** check box. Make sure that all other check boxes are cleared.
- b Clear the **Treat consecutive delimiters as one** check box.
- c From the **Text qualifier** drop-down list, select the double quotes (").

8 Click **Next**.

The Text Import Wizard - Step 3 of 3 window opens

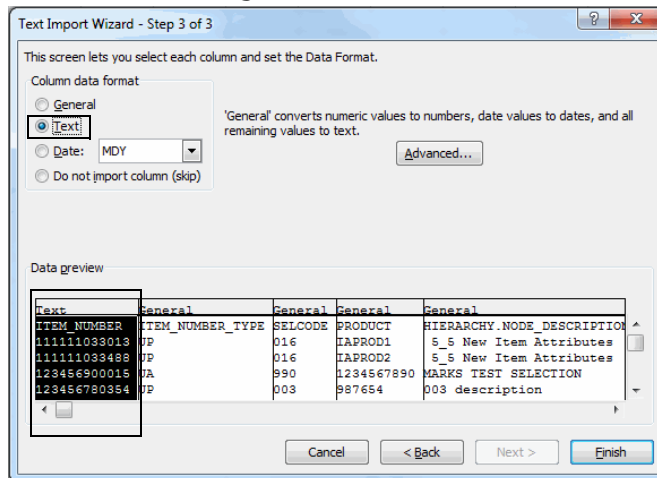


- 9 Select the first column (which contains the ITEM_NUMBER) by clicking the *General* column heading.

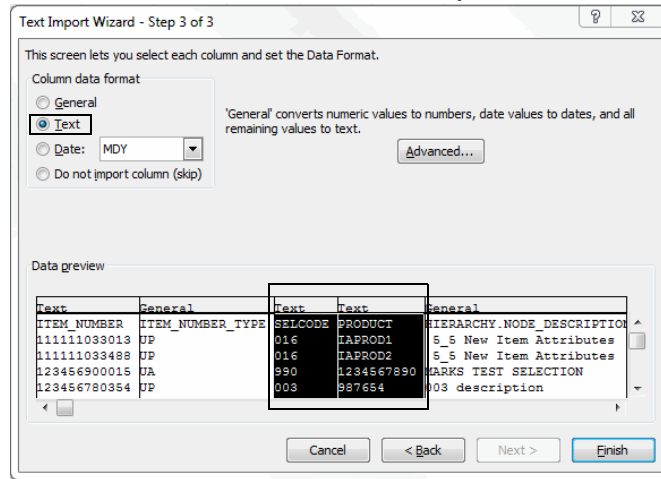
The column highlights.

- 10 Under Column data format, select **Text**.

The column heading now reads *Text*.



- Repeat Steps 9 and 10 for the third and fourth *General* columns (which contain the Selection Code and Product data) to set them to a *Text* data format.



Note: Depending on the filter you selected, Private Account IDs associated with Unit Cost and MSRP also need to be set to a *Text* data format.

- Click **Finish**.

The downloaded data displays in Excel, and the format of the GTINs, Selection codes, and Products is preserved.

	A	B	C	D	E	F	G
	ITEM_NUMBER	ITEM_NUMBER_TYPE	SELCODE	PRODUCT	HIERARCHY.NODE_DESCRIPTION	HIERARCHY.PRODUCT_DESCRIPTION	HIERARCHY.PRODUCT_DESCRIPTION.EXTENDED
1	111111033013	UP	016	IAPROD1	5_5 New Item Attributes	Sivr Brclt Amethyst	
2	111111033488	UP	016	IAPROD2	5_5 New Item Attributes	IAProd2	
3	123456900015	UA	990	1234567890	MARKS TEST SELECTION	NEW PRODUCT DESCRIPTION	
4	123456780354	UP	003	987654	003 description	987654	product1 extended
5	123456780361	UP	003	987654	003 description	987654	product1 extended
6	123456780378	UP	003	987654	003 description	987654	product1 extended
7	123456780385	UP	003	987654	003 description	987654	product1 extended
8	123456780408	UP	003	987654	003 description	987654	product1 extended
9	123456780415	UP	003	987654	003 description	987654	product1 extended
10	123456780422	UP	003	987654	003 description	987654	product1 extended
11	123456780439	UP	003	987654	003 description	987654	product1 extended
12	123456780446	UP	003	987654	003 description	987654	product1 extended
13	123456780453	UP	003	987654	003 description	987654	product1 extended
14	963852590726	UP	003	987654	003 description	987654	product1 extended
15	55555003193	UP	003	1234-C	003 description	COTTON SOCKSS	product1 extended

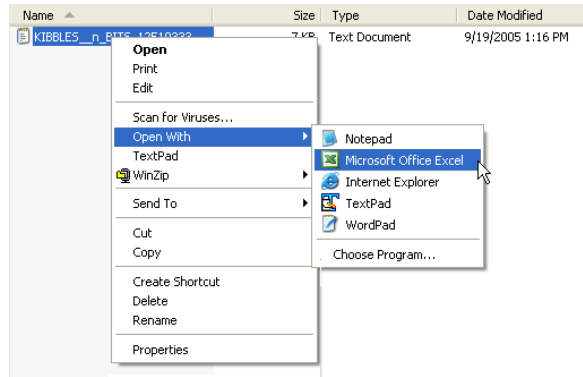
Note: To expand all columns to the width of the data within each column, highlight the entire spreadsheet by clicking on the upper left-hand corner of the spreadsheet, and then double-click on the line between any of the column headings.

Using the Open With Option from Windows Explorer

- In Windows Explorer, navigate to the location of the text file.

2 Right-click on the file and select **Open With > Microsoft Office Excel**.

Note: Double-clicking on the file will open it in Notepad.



The downloaded data displays in Excel, but each line of data is stored in the first column.

3 Select the first column (A) by clicking on the **A** column heading.

4 From the **Data** menu, select **Text to Columns**. MS Excel’s Text Import Wizard - Step 1 of 3 window opens.

Continue with Step 5 in the section, [“Using the MS Excel Text Import Wizard” on page 221](#), and complete the remaining steps in that section. They will guide you through Excel’s Text Import Wizard until the downloaded data displays in Excel.

Downloading Images

This section describes how to download the physical images associated with Products and GTINs:

- [“Downloading Product Images” on page 225](#)
- [“Downloading GTIN Images” on page 226](#)

Downloading Product Images

You can download a physical image that is associated with a Product. This is a billable action.

To download a Product image

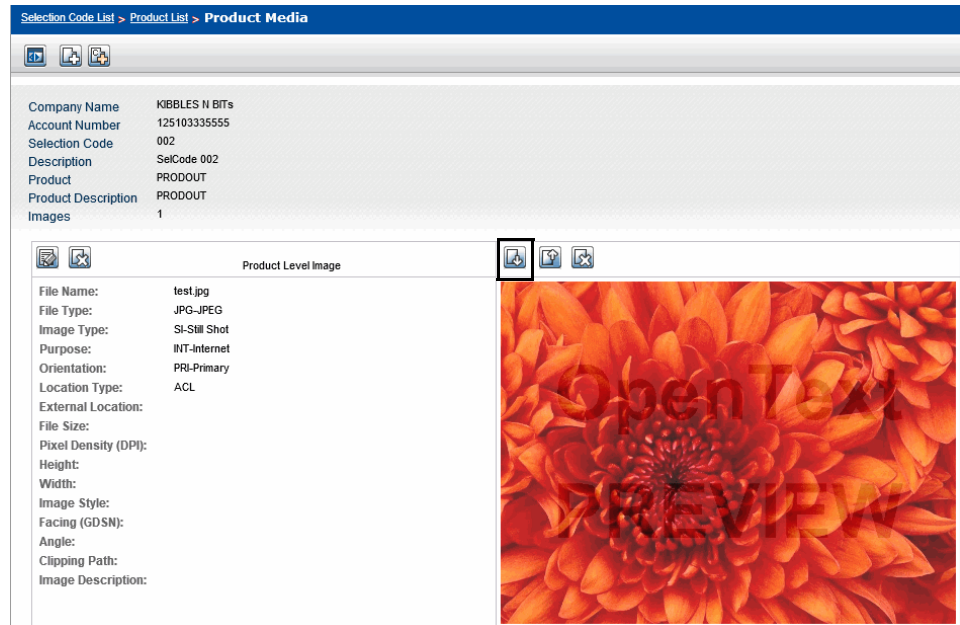
- 1 Find the Product image you want to download.
 - See [“Finding Products Across Selection Codes” on page 80](#).
 - See [“Finding Products Under One Selection Code” on page 82](#).

The Product List page opens.

- 2 Click the image hyperlink (in the Image column) for the Product whose image you want to download.

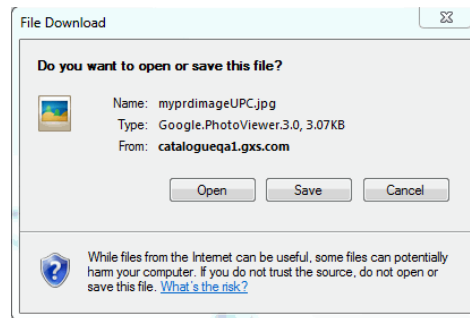
<input type="checkbox"/>	Product ▲	Description	Create Date	Last Update Date	GTINs	GTIN Filter	Images
<input type="checkbox"/>	IMAGEPROD2	Image Product 2	08/19/13	08/19/13	2	2	2

The Product Media page opens.



3 Click **Download Image** (a billable action).

The File Download dialog box opens.



4 Click **Save**.

The Save As dialog box opens.

5 Navigate to the location where you want to save the image, and click **Save**.

The image is saved to your computer.

Note: The image is not watermarked and has a higher resolution than the watermarked image that displays in Catalogue.

Downloading GTIN Images

You can download a physical image that is associated with a GTIN. This is a billable action.

To download a GTIN image

1 Find the GTIN image you want to download.

- See "Finding GTINs Across Selection Codes" on page 88.
- See "Finding GTINs Under One Product" on page 90.

The GTIN List page opens.

2 Click the image hyperlink (in the Image column) for the GTIN whose image you want to download.

<input type="checkbox"/>			GTIN	GTIN Type	Pack	Color	Color Description	Size	Size Description	Published Cost	Suggested Retail	Create Date	Last Update Date	Discontinue Date	Images
<input type="checkbox"/>			111111032849	UP		003	Silver	10031	31			08/19/13			
<input type="checkbox"/>			111111032856	UP		004	Silver4	10031	31			08/19/13			

The Item Media page opens.

Selection Code List > Product List > GTIN List > **Item Media**

Company Name: KIBBLES N BITS
 Account Number: 125103335555
 Selection Code: 002
 Description: SelCode 002
 Product: PRODOOT
 Product Description: PRODOOT
 GTIN: 003852284014
 GTIN Type: UA
 Images: 1

Item Level Image

File Name: file1.jpg
 File Type: JPG-JPEG
 Image Type: St-Still Shot
 Purpose: INT-Internet
 Orientation: PRI-Primary
 Location Type: ACL
 External Location:
 File Size:
 Pixel Density (DPI):
 Height:
 Width:
 Image Style:
 Facing (GDSN):
 Angle:
 Clipping Path:
 Image Description:

3 Click **Download Image** (a billable action).

The File Download dialog box opens.

File Download

Do you want to open or save this file?

Name: myprdimageUPC.jpg
 Type: Google.PhotoViewer.3.0, 3.07KB
 From: catalogueqa1.gxs.com

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

4 Click **Save**.

The Save As dialog box opens.

5 Navigate to the location where you want to save the image, and click **Save**.

The image is saved to your computer.

Note: The image is not watermarked and has a higher resolution than the watermarked image that displays in Catalogue.

You can use the user interface (UI) to monitor EDI files that you send to OpenText Active Catalogue. The following pages will help you identify your errors. In some cases, you can correct your errors online.

- **The EDI Management Console (EMC) List**—This page displays EDI validation and EDI standards validation errors which are described in the section, [“EDI Validation Workflow” on page 228](#). The section, [“Using the EDI Management Console” on page 229](#), describes how to use the EMC page to monitor the EDI files that you send.
- **Error Processing (EP)**—This module consists of a series of pages that allows you to drill down to see translation and data validation errors which are described in the section, [“EDI Validation Workflow” on page 228](#). [Chapter 14, “Online Correction of Errors,” on page 235](#), describes how to use the EP pages to manage and correct EDI errors.

Before submitting EDI data to your production environment, you can validate your data by submitting sample EDI text or an EDI test file to Catalogue. The section, [“Submitting EDI Sample Data” on page 233](#), describes how to submit EDI data.

This section is organized as follows:

- [“EDI Validation Workflow” on page 228](#).
- [“Using the EDI Management Console” on page 229](#).
- [“Filtering the EDI File List on the EMC” on page 232](#).
- [“Submitting EDI Sample Data” on page 233](#).

EDI Validation Workflow

OpenText Active Catalogue performs the following validations of your EDI data:

- 1 EDI validation** - Catalogue first checks your data to ensure that it is EDI data. Typical errors at this stage are unknown Catalogue account number, unknown batch password and unknown proxy account. These types of errors appear on the EMC page. See [“Using the EDI Management Console” on page 229](#) to identify these types of errors.
- 2 EDI standards validation** - Catalogue validates the EDI data to ensure that the EDI conforms to published EDI standards. The EDI data is validated for EDI qualifiers, mandatory segments and elements, field lengths, and so on. These types of errors appear on the EMC page. See [“Using the EDI Management Console” on page 229](#) to identify these types of errors.

You must fix all EDI standards validation errors and resend the EDI document before Catalogue can process the file.

- 3 Translation validation** - If an ST group in your EDI data contains a translation error, the entire group is sent to Error Processing (EP). Subsequent ST groups will continue to be processed. You can use EP to locate the error in the EDI data. See ["Viewing Translation Errors in an EDI Document"](#) on [page 245](#) to identify these types of errors.

You must fix all translation errors and resend the EDI data before Catalogue can process the file.

- 4 Data validation** - Catalogue validates the EDI data to ensure that it conforms to Catalogue specifications such as business rules, data validations, and compliance checks. These rules are documented in the following guides, depending on the type of EDI document you are submitting:

- *OpenText Active Catalogue 832 (v4010) Batch Guide for Vendors*
- *OpenText Active Catalogue 832 (v4030) Batch Guide for Vendors*
- *OpenText Active Catalogue 888 Batch Guide for Vendors*

Examples of errors at this stage include invalid batch password and error for action "00" when the G53 segment is not correct. These types of errors appear in Error Processing (EP). See [Chapter 14, "Online Correction of Errors,"](#) on [page 235](#) to identify these types of errors.

Using the EDI Management Console

You can use the EDI Management Console (EMC) to monitor the EDI files that you send to Catalogue (EDI documents sent to your production environment or EDI sample data sent to the demo environment). The EMC displays EDI validation (for example, unknown Catalogue account number, unknown batch password or unknown proxy account) and EDI standards validation errors (for example, non-compliant EDI qualifiers, mandatory segments and elements, field lengths and so on).

Note: EDI files and records on the EDI Management Console are retained for 180 days.

To view EDI errors on the EDI Management Console

- 1 Log in to the environment where you submitted the EDI files:
 - **Your production environment**—The URL for the production environment is <https://catalogue.gxs.com>
 - **The demo environment**—The demo environment is used to submit sample EDI text or test EDI files to validate data before it is submitted to your production environment. The URL for the demo environment is <https://cataloguedemo.gxs.com>

Note: Before you can submit EDI sample data, you must have a Catalogue Demo Account set up in the demo environment. Call OpenText Cloud Support Services (CSS) at 1-800-334-2255 for information on setting up this account.

2 Click Data Management > EDI Management Console. The EDI Management Console List page opens.

EDI Management Console List

Search

Filter

Status

1 2 3 4 5 6 7 8 9 10

<input type="checkbox"/>	Status	Document Control Number	Account Number	Account Name	File Name	File Size	Queued	Started	Finished	Duration	Notes	Download
<input type="checkbox"/>	Completed	997230671:00002	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 18:00:20	02/06/2019 18:00:21	02/06/2019 18:00:22	1s 110ms	Catalogue Maintenance	
<input type="checkbox"/>	Completed With Errors	997230671:00001	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 17:59:14	02/06/2019 17:59:15	02/06/2019 17:59:24	8s 578ms	Catalogue Maintenance	
<input type="checkbox"/>	Completed With Errors	997230671	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 17:58:49	02/06/2019 17:58:50	02/06/2019 17:58:58	8s 125ms	Catalogue Maintenance	
<input type="checkbox"/>	Completed	958987507:00002	125103335555	KIBBLES	Kibbles_NewAttributes.edi	6,846 bytes	02/06/2019 17:47:44	02/06/2019 17:47:44	02/06/2019 17:47:47	2s 609ms	Catalogue Maintenance	

The table displays from left for each EDI file:

Check boxes to the left of files	Check boxes for selecting EDI files to cancel processing. Note: Click the top check box to the left of the Status heading to select all documents on a page. Once this check box is selected, deselecting a check box for any file deselects the top check box.
Status	File's current status: <ul style="list-style-type: none"> ■ New—The file has not been processed by the system and is eligible for processing. ■ Completed—The file has been processed by the system and there are no errors. ■ Completed With Errors—The file has been processed by the system, but it contains business errors (for example, an incorrect color code) which will appear in Error Processing (EP). ■ In Progress—The file is being processed. ■ In Error—The file failed EDI validation. Typical errors include unknown Catalogue account number, unknown batch password, and unknown proxy account. An email of this error is sent to cataloguesupport@opentext.com. ■ Cancelled—The file is not eligible for processing by the system; someone took the action to cancel the file from being processed. ■ Partially Processed—The file's processing was suspended because the queue processor shut down. When the queue processor restarts, the file resumes processing and its status is changed to In Progress. ■ Failed Validation—The file failed EDI standards validation; EDI data does not conform to published EDI standards. Typical errors include EDI qualifiers, mandatory segments and elements, field lengths, and so on. ■ Unsupported Document Type—The file is not an EDI file. ■ Duplicate CtlNum—The file failed because another file with the same control number was already submitted for processing. This status is not applicable if the option "Allow duplicate ISA/IEA control numbers" has been set for your account by an administrator.
Document Control Number	The control number of the original EDI file. If your account is set up to allow duplicate control numbers, a sequence number is generated up to 99,999. The number is displayed as <i>DocumentControlNumber:SequenceNumber</i> If the Load Status Report option has been turned on at the account level (by the OpenText administrator), you can click on the document control number to display the Load Status Report (LSR) for the file (which can then be downloaded). To turn on the LSR option, see " Contacting Technical Support " on page 5. For more information on the LSR, see " Load Status Report " on page 184.
Account Number	The identification number of the account to which the file was submitted.

Account Name	The name of the account to which the file was submitted.
File Name	The name of the file.
File Size (bytes)	The size of the file you submitted. Move your cursor over the file size to see the name of the file. This file name is the OpenText Doc ID.
Queued	The date and time the file was retrieved from Inovisworks via FTP.
Started	The date and time Catalogue started processing the file.
Finished	The date and time Catalogue finished processing the file.
Duration	The amount of time it took Catalogue to process the file.
Notes	Detailed information about the error.
Download	Click the Download icon associated with a file to open or save the EDI file in standard size (not zip file). EDI files are available regardless of their status.

- 3 To locate a file in the list, do any of the following:
- Filter the EDI file list. See “Filtering the EDI File List on the EMC” on page 232.
 - Scroll down the list.
 - Use the browse bar to move between pages.

Filtering the EDI File List on the EMC

You can use the filter to display the EDI file list based on the criteria you specify.

To filter the EDI file list

- 1 On the EDI Management Console (EMC) List page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - **Status**—Select a status from the drop-down list to display only results with the specified status:
 - **New**—The file has not been processed by the system and is eligible for processing.
 - **Completed**—The file has been processed by the system and there are no errors.
 - **Completed with Errors**—The file has been processed by the system, but it contains business errors (for example, an incorrect color code) which will appear in Error Processing (EP).
 - **In Progress**—The file is being processed.
 - **In Error**—The file failed EDI validation. Typical errors include unknown Catalogue account number, unknown batch password, and unknown proxy account. An email of this error is sent to cataloguesupport@opentext.com.
 - **Cancelled**—The file is not eligible for processing by the system; someone took the action to cancel the file from being processed.

- **Partially Processed**—The file’s processing was suspended because the queue processor shut down. When the queue processor restarts, the file resumes processing and its status is changed to In Progress.
- **Failed Validation**—The file failed EDI standards validation; EDI data does not conform to published EDI standards. Typical errors include EDI qualifiers, mandatory segments and elements, field lengths, and so on.
- **Unsupported Document Type**—The file is not an EDI file.
- **Duplicate CtlNum**—The file failed because another file with the same control number was already submitted for processing.
- **Document Control Number**—Enter the full or partial document control number (ST control number) of the file.

2 Click **Filter**. The list that meets your criteria displays.

Note: To remove all filter criteria, click **Clear Filter**.

Submitting EDI Sample Data

You can submit sample EDI text or an EDI test file to Catalogue’s demo environment. This feature is not available in the production environment. Catalogue will validate the EDI data, and any resulting errors will appear on the EDI Management Console List page or in Error Processing.

Note: Before you can submit EDI sample data, you must contact OpenText Cloud Support Services (CSS) at 1-800-334-2255 to initiate the process of setting up a Catalogue Demo Account for you in the demo environment.

To submit EDI data

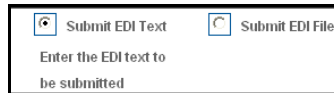
1 Log in to the demo environment at the following URL:

<https://cataloguedemo.gxs.com>

2 Click **Data Management > EDI Management Console**. The EDI Management Console List page opens.

<input type="checkbox"/>	Status	Document Control Number	Account Number	Account Name	File Name	File Size	Queued	Started	Finished	Duration	Notes
<input type="checkbox"/>	Completed	997230671.00002	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 18:00:20	02/06/2019 18:00:21	02/06/2019 18:00:22	1s 110ms	Catalogue Maintenance
<input type="checkbox"/>	Completed With Errors	997230671.00001	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 17:59:14	02/06/2019 17:59:15	02/06/2019 17:59:24	8s 578ms	Catalogue Maintenance
<input type="checkbox"/>	Completed With Errors	997230671	125103335555	KIBBLES	832_inbound_CommonAttributes.edi	1,891 bytes	02/06/2019 17:58:49	02/06/2019 17:58:50	02/06/2019 17:58:58	8s 125ms	Catalogue Maintenance
<input type="checkbox"/>	Completed	958987507.00002	125103335555	KIBBLES	Kibbles_NewAttributes.edi	6,646 bytes	02/06/2019 17:47:44	02/06/2019 17:47:44	02/06/2019 17:47:47	2s 609ms	Catalogue Maintenance

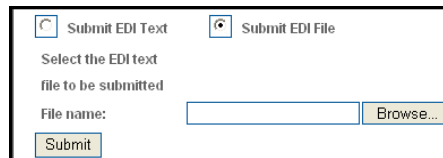
- 3 Click **Add EDI**. The Submit EDI page opens.



The screenshot shows a web form with two radio buttons at the top: "Submit EDI Text" (which is selected) and "Submit EDI File". Below the radio buttons is a text input field with the placeholder text "Enter the EDI text to be submitted".

- 4 Select the option for submitting your EDI data:

- **Submit EDI Text**—Select this option if you want to enter EDI text. Enter your EDI test data in the box on the page. To clear the text and start over, click **Clear**.
- **Submit EDI File**—Select this option to re-display the page with an option to browse for your file, as shown below. Click **Browse**, navigate to your file, select it, and click **Open**. The path to the file appears in the File Name text box.



The screenshot shows the same web form as above, but now the "Submit EDI File" radio button is selected. Below the radio buttons, the text reads "Select the EDI text file to be submitted". There is a "File name:" label followed by a text input field and a "Browse..." button. At the bottom left, there is a "Submit" button.

- 5 Click **Submit** to submit your file to Catalogue. The page displays a message indicating whether your file was submitted successfully.

EDI validation and EDI standards validation errors appear on the EDI Management Console (EMC) List page. See ["Using the EDI Management Console" on page 229](#) to identify these types of errors.

Translation and data validation errors appear in Error Processing (EP). See [Chapter 14, "Online Correction of Errors," on page 235](#) to identify these types of errors.

Online Correction of Errors **14**

This section explains how to use the Error Processing (EP) module in the browser interface. The Error Processing module is used to manage any errors encountered by Catalogue while processing a batch EDI document or EDI sample data (see [“Submitting EDI Sample Data” on page 233](#)). These errors prevent Catalogue from processing the complete document and must be corrected before the remaining actions in the document can be completed.

Note: Error Processing is only used to manage errors generated by batch documents or errors generated by submitting EDI sample data. Errors encountered in the browser are displayed on the page.

This section is organized as follows:

- [“How Catalogue Processes Batch Files” on page 235.](#)
- [“Strategies for Correcting Errors” on page 237.](#)
- [“Rejectable qXML Functions” on page 239.](#)
- [“Levels of Error Processing” on page 239.](#)
- [“Navigating Error Processing” on page 240.](#)
- [“Viewing Translation Errors in an EDI Document” on page 245.](#)
- [“Copying Error Processing Data to a Table” on page 246](#)
- [“Selecting Errors for Delete, Revert, or Edit” on page 248.](#)
- [“Deleting Errors” on page 250.](#)
- [“Correcting Errors” on page 250.](#)
- [“Reverting Errors” on page 253.](#)
- [“Resubmitting Error Documents” on page 254.](#)
- [“Marking Error Documents as Read or Unread” on page 254.](#)

How Catalogue Processes Batch Files

Documents sent by batch interface to Catalogue go through the following process:

- 1 OpenText picks up the inbound EDI document from the OpenText electronic mailbox.
- 2 OpenText checks file integrity against the EDI standards.
- 3 The EDI document is validated for EDI qualifiers, mandatory segments and elements, field lengths, and so on.

If your administrator has not selected the option (during the account set-up process) that prevents functional acknowledgements (FAs) from being generated, one of the following occurs:

- If the document passes EDI validation, you will receive a positive FA (997 or CNTRL) message to acknowledge receipt of the document. The process continues with Step 4.
- If the document fails EDI validation, you will receive a negative FA message. The errors will not appear in Error Processing (EP). You must resend a corrected standards-compliant EDI document that Catalogue will be able to process.

Note: Control numbers must be unique. If a duplicate control number is found, the entire EDI document will be ignored. The corrected document must be sent with a new control number.

- 4 The files are queued and processed in FIFO order (first files in are the first files out).
- 5 Within the EDI document, Catalogue processes each valid ST group as a separate transaction. OpenText translates each transaction into a series of qXML functions.

qXML is the OpenText-designed implementation of XML, a document format created to load data into Catalogue. Within qXML, the original EDI is structured as "functions" (actions, records, or business tasks). Successful translation depends on the correct use of EDI mapping as detailed in the *OpenText Active Catalogue 832 Batch Guide for Vendors* and the *OpenText Active Catalogue 888 Batch Guide for Vendors*.

Note: EDI documents containing errors that prevent translation into qXML appear in EP. You can use EP to locate the error in the EDI document. You must then fix the errors and resend the EDI document.

- 6 Catalogue attempts to validate the functions. This includes running business rule validations, data validations, and compliance checks for each item. The system stops processing a specific function when it encounters the first error in that function. Catalogue continues processing subsequent functions.

This process results in one of the following:

- **No errors**—Successful data maintenance for that item.
- **Errors**—The errors are sent to Error Processing (EP). No data maintenance takes place for that item. You can correct the errors online through EP and resubmit the error document.

- 7 Catalogue sends you a separate email for each EDI document that contains errors. It includes a hyperlink to the browser interface where you can troubleshoot the errors.

The email can be recognized by its subject line:

"OpenText Active Catalogue error report (control number: *DocumentControlNumber*)."

See the example below. The email includes the number of qXML functions (translated from EDI) that were rejected and a summary of the errors.

The email is sent to the primary contact email address for your account (**Account > Account Details** on the **Account Details** tab in the Contact panel). Be sure that this email address is valid.

Example

Subject: OpenText Active Catalogue error report (control number: *DocumentControlNumber*)

One or more errors occurred while processing your input file. Please login to the OpenText Active Catalogue User Interface to review and manage these errors.

<https://catalogue.gxs.com>

Control number: *DocumentControlNumber*

Date: May 6, 2007

Time: 5:27:38 AM

Number of errors: 360

Error	Count	Description
-20505	23	Failed to get existing item attributes; error code=-20505
-20505	15	Item Number not found
-20511	3	Duplicate item number302
-90034	1	Item number already exists
-20510	318	Specified Selection Code or Product not found. It may have been deleted by another user.

8 You can use Error Processing in the browser interface to view and manage errors. See the next section, "Strategies for Correcting Errors."

Note: Any errors displayed in Error Processing are automatically purged from Catalogue after 60 days.

Strategies for Correcting Errors

Depending on the type of errors in your document, use the appropriate strategies described in the sections below to correct them.

- "EDI Validation Errors"
- "Translation Errors"
- "Data Validation Errors"

EDI Validation Errors

If you sent an EDI document and received a negative FA message, your document was not compliant with EDI standards. You must fix all EDI standards validation errors before Catalogue can process the file. This type of error does not appear in EP. It appears on the EDI Management Console (EMC) List page. See [Chapter 13, "Working with EDI Data," on page 228](#) for information on using this page to identify errors.

Note: Control numbers must be unique. If a duplicate control number is found, the entire EDI document will be ignored. The corrected document must be sent with a new control number.

Translation Errors

If an ST group in your EDI document contains a translation error, the entire group is sent to EP. Subsequent ST groups will continue to be processed. You can use EP to locate the error in the EDI document. See [“Viewing Translation Errors in an EDI Document” on page 245](#).

You must fix all translation errors and resend the EDI document before Catalogue can process the file.

Data Validation Errors

If an EDI document is standards-compliant and has not triggered a translation error, the functions it contains will be processed by Catalogue. This includes running business rule validations, data validations, and compliance checks for each item. If an error occurs during one of these checks, the error appears in EP, and no data maintenance takes place for that item.

There are several ways to approach correcting data validation errors (online and offline)

Online Error Corrections

Online error corrections are corrections you make using EP. Two possible strategies are listed below:

- Examine the types of errors and the details of an error. Drill down to the Error Processing (error detail) page, edit the values, and resubmit the error document that contains that error.
- Examine the types of errors in one or more functions. Some errors may be compounded; that is, an error in one function causes errors in other functions. Fixing an error in one function will allow all the error documents to be resubmitted.

Example: One qXML function may create a Selection Code; however, the Selection Code description is invalid. Another qXML function attempts to add items under the same Selection Code which does not yet exist. Therefore, both functions contain errors. You can fix one error (the Selection Code) and resubmit all the error documents; all functions will succeed.

Offline Error Corrections

Offline error corrections are corrections you make using an interface other than the browser interface.

You can examine the types of errors in one or more error documents. You may decide that it is easier to change the data in the system that generated the document and resend the EDI document to OpenText. Therefore, you would want to delete the error document in Error Processing because it will be superseded by a document with new data.

Note: Control numbers must be unique. If a duplicate control number is found, the entire EDI document will be ignored. The corrected document must be sent with a new control number.

Using Group Edit to Correct Errors

If you review the cause of an error and realize that the same error exists across all data you have sent, you can use group edit to apply the same change to *a selected group of errors*. Group edit is a powerful feature that allows you to:

- set all actions to a specific action (add, replace, update, delete)
- replace an action with a different action (replace “update” with “replace”, replace “delete” with “add”, etc.)
- search for a combination of a value, a UOM, and/or an account number for a selected attribute and replace one or more of them with a new combination of a value, a UOM, and/or an account number

Note: In most cases, it is preferable to edit the source data (for example, the item master) used to generate the batch file that you load into Catalogue. However, there may be instances where you need to temporarily fix data already pending at OpenText so that the data being sent to your trading partner is not delayed.

Rejectable qXML Functions

In general, a rejectable qXML function is a qXML function that can change data in the database. If a rejectable qXML function contains an error, it is sent to Error Processing. The following qXML functions are rejectable:

- bulkLoadAccountAttributes—Maintaining your account attributes
- bulkLoadHierarchyAttributes—Adding and updating Selection Codes and Products
- deleteHierarchyNode—Deleting Selection Codes and Products
- bulkLoadItemAttributes—Adding and updating GTINs
- deleteItemNumber—Deleting GTINs

Levels of Error Processing

You can analyze and fix errors by using Error Processing to drill down into subsequent levels of detail.

- **Error Processing (document list) page**—Displays error documents. Each error document contains the errors generated by a single input document. You can click on a document to open subsequent pages and with more detail about the error:
 - **Error Processing (error type list) page**—If the error is *not* an EDI Error, this page opens to displays all errors for the selected error document. All errors are grouped by error type. A description identifies the type of error. Each group of error types can be expanded to display a list of all errors for that error type. You can click on an error to open the Error Processing (error detail) page; this is the next level of detail.
 - **Error Processing (error detail) page**—This is the lowest level for an error that is not an EDI Error. This page displays details about the

selected error, indicates the attribute values that are invalid, and allows you to correct the values.

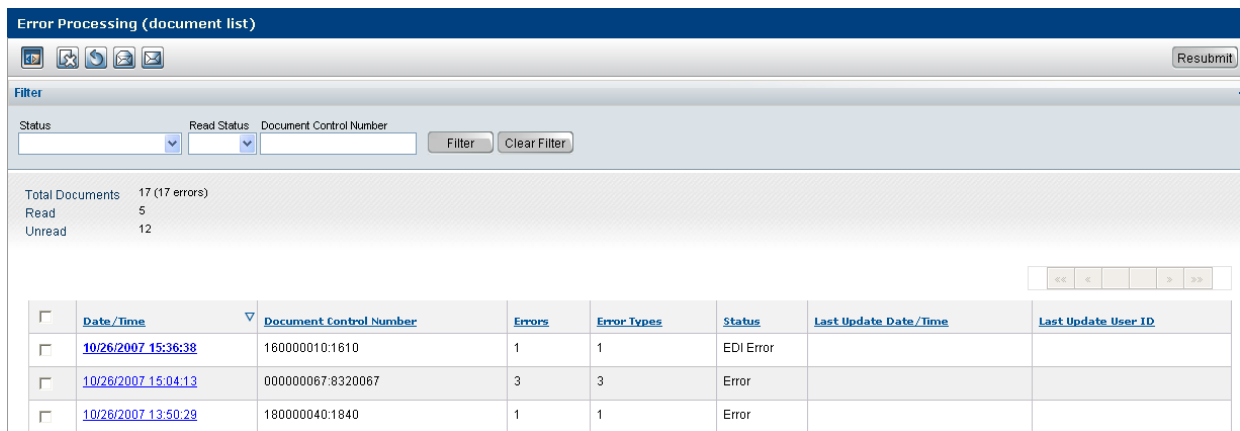
- **Error Processing (document translation error) page**—If the error is an EDI Error, this page opens to display a fragment of the EDI document that highlights the error. You can also go to the EDI Management Console (EMC) page to see further details about the document. See [Chapter 13, "Working with EDI Data," on page 228](#) for information on using this page to identify errors.

Note: Any errors displayed in Error Processing are automatically purged from Catalogue after 60 days.

Navigating Error Processing

To navigate through the levels of Error Processing

- 1 Click **Data Management > Error Processing**. The Error Processing (document list) page opens.



The table displays from left for each error document:

Check boxes to the left of error documents	Check boxes for selecting error documents to delete, resubmit, or revert. Note: Select the top check box to the left of the Date/Time heading to select all documents on a page. Once this check box is selected, deselecting a check box for any document deselects the top check box.
Date/Time	Date and time the document containing errors was retrieved and processed by Catalogue (list begins with most recent documents). Click the hyperlink to open the Error Processing (error type list) page for the error document.

Document Control Number	A separate record is displayed for each ST segment that contains a translation error; the ST number is appended to the control number of the original EDI document. Note: One email notification is sent for each EDI document that was sent, even though several segments may be in error. If your account is set up to allow duplicate control numbers, the record is displayed as <i>DocumentControlNumber:TransactionNumber:SequenceNumber</i>
Errors	Number of errors in the error document.
Error Types	Number of error types in the error document.
Status	Error document's current status: Error —No errors in the error document have been edited. EDI Error —Translation errors have occurred in an ST segment of a sent EDI document. EDI errors cannot be fixed and resubmitted using Error Processing; however, you can view a fragment of the EDI document that contains the error to help you identify the problem. Maintained —One or more errors in the error document have been edited, but the error document has not been resubmitted. Pending Resubmit —Error document resubmission is pending. Error Resubmit —Error document was resubmitted and still contains an error. Synchronous Resubmit —Error document has been resubmitted and is in progress.
Last Update Date/Time	Date and time the error document was last updated or resubmitted to Catalogue.
Last Update User ID	User who last updated the error document.

Documents whose dates and times are in plain typeface have been read or marked "Read." Those in bold typeface have not been read or have been marked "Unread." For more information, see ["Marking Error Documents as Read or Unread" on page 254.](#)

2 To find an error document in the list:

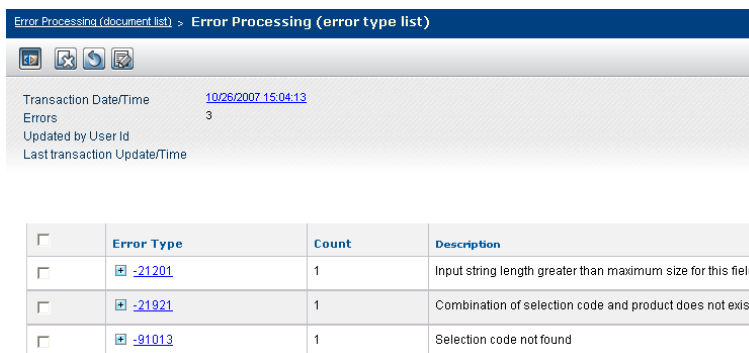
- Filter the list to find specific types of error documents. See ["Filtering the Error Documents List" on page 244.](#)
- Scroll through the list.
- Use the browse bar to move between pages.

For each document, you can look at the number of errors and the number of error types to get an idea of the scope of errors in a document.

3 Do one of the following:

- To view a fragment of the EDI document that contains a translation error (identified by the status EDI Error), click the error document's hyperlink in the Date/Time column. See ["Viewing Translation Errors in an EDI Document" on page 245.](#)

- To view more details about the EDI data request that contains an error (identified by the status Uncorrectable Error), click the error document's hyperlink in the Date/Time column. See
 - To view a list of error types in an error document, click the error document's hyperlink in the Date/Time column. The Error Processing (error type list) page opens. Go to Step 4.
 - To resubmit errors by error document, see ["Resubmitting Error Documents" on page 254.](#)
 - To delete errors by error document, see ["Deleting Errors" on page 250.](#)
 - To revert errors by error document, see ["Reverting Errors" on page 253.](#)
- 4 On the Error Processing (error type list) page, errors are listed by error types.



The table displays from left for each error type:

Check boxes to the left of the Error Type column	Check boxes for selecting error types to delete, revert, or edit. Note: Select the top check box to the left of the Error Type heading to select all error types on a page. Once this check box is selected, deselecting a check box for any error type deselects the top check box.
Error Type	Code indicating error type. Click the Error Type hyperlink to expand (or collapse) a list of all errors for that error type.
Count	Number of errors for that error type.
Description	Description of the error type.

To expand a list of all errors for a specific error type, click the Error Type hyperlink. The expanded view is shown below.

Transaction Date/Time: 10/26/2007 15:04:13
 Errors: 3
 Updated by User Id:
 Last transaction Update/Time:

Error Type	Count	Description														
-21201	1	Input string length greater than maximum size for this field														
<table border="1"> <thead> <tr> <th>Item</th> <th>Action</th> <th>Selection Code</th> <th>Product</th> <th>GTIN</th> <th>Details</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Load selection code / product</td> <td>558</td> <td></td> <td></td> <td>HIERARCHY.NODE_DESCRIPTION: "558test description too long haa haa haa" exceeds the maximum length of 25</td> <td>Error</td> </tr> </tbody> </table>			Item	Action	Selection Code	Product	GTIN	Details	Status	<input type="checkbox"/>	Load selection code / product	558			HIERARCHY.NODE_DESCRIPTION: "558test description too long haa haa haa" exceeds the maximum length of 25	Error
Item	Action	Selection Code	Product	GTIN	Details	Status										
<input type="checkbox"/>	Load selection code / product	558			HIERARCHY.NODE_DESCRIPTION: "558test description too long haa haa haa" exceeds the maximum length of 25	Error										
-21921	1	Combination of selection code and product does not exist.														
<table border="1"> <thead> <tr> <th>Item</th> <th>Action</th> <th>Selection Code</th> <th>Product</th> <th>GTIN</th> <th>Details</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Load item attributes</td> <td>558</td> <td>832-0009</td> <td>666666100050</td> <td>unable to locate item hierarchy</td> <td>Error</td> </tr> </tbody> </table>			Item	Action	Selection Code	Product	GTIN	Details	Status	<input type="checkbox"/>	Load item attributes	558	832-0009	666666100050	unable to locate item hierarchy	Error
Item	Action	Selection Code	Product	GTIN	Details	Status										
<input type="checkbox"/>	Load item attributes	558	832-0009	666666100050	unable to locate item hierarchy	Error										
-91013	1	Selection code not found														
<table border="1"> <thead> <tr> <th>Item</th> <th>Action</th> <th>Selection Code</th> <th>Product</th> <th>GTIN</th> <th>Details</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Load selection code / product</td> <td>558</td> <td></td> <td>832-0009</td> <td>Selection code not found</td> <td>Error</td> </tr> </tbody> </table>			Item	Action	Selection Code	Product	GTIN	Details	Status	<input type="checkbox"/>	Load selection code / product	558		832-0009	Selection code not found	Error
Item	Action	Selection Code	Product	GTIN	Details	Status										
<input type="checkbox"/>	Load selection code / product	558		832-0009	Selection code not found	Error										

Errors are listed by error types. The table displays from left for each error type:

Check boxes to the left of the errors (in the Action column)	Check boxes for selecting errors to delete, revert, or edit.
Action	Specifies the action the function was attempting to perform. Click the hyperlink to open the Error Processing (error detail) page to view detailed information about the error and to edit attribute values to correct the error.
Selection Code	When applicable, specifies the Selection Code in the error.
Product	When applicable, specifies the Product in the error.
GTIN	When applicable, specifies the GTIN in the error.
Details	Text description of the error.
Status	Error's current status: <ul style="list-style-type: none"> ■ Error—Error has not been edited. ■ Maintained—Error has been edited.

5 Do one of the following:

- To view the details of an error, click its hyperlink in the Action column. The Error Processing (error detail) page opens. Go to Step 6.
- To delete errors individually or by error type, see ["Deleting Errors" on page 250](#).
- To revert errors individually or by error type, see ["Reverting Errors" on page 253](#).

6 View the Error Processing (error detail) page.

Transaction Date/Time: 10/28/2007 15:04:13
 Function Name: BulkLoadHierarchyAttributes
 Error Type: -21201
 Status: Error
 Updated by User Id:
 Last transaction Update/Time:
 Error Description: HIERARCHY.NODE_DESCRIPTION: "558test description too long haa haa haa" exceeds the maximum length of 25

Delete	Attribute Name	Value	UOM	Private Account ID
<input type="checkbox"/>	Target Account Number	125103335555		
<input type="checkbox"/>	Action	Add		
<input type="checkbox"/>	Selection Code and/or Product			
<input type="checkbox"/>	Selection Code or Product	558		
<input type="checkbox"/>	Selection Code Description	558test description too lon		

The table displays from left for each attribute in the function:

Delete	Check box to select the attribute for deletion from the function.
Attribute Name	The attribute name.
Value	Value of the attribute.
UOM	Unit of measure for the attribute (if applicable).
Private Account ID	Field for retailer number (if applicable) when attribute is private (for example, Unit Cost).

Error locations are indicated in red. Details about the error are displayed. See ["Correcting Errors" on page 250](#) for information about correcting errors.

Filtering the Error Documents List

You can use a filter to display a list of error documents based on the criteria you specify.

To filter the error documents list

- On the Error Processing (document list) page, enter the criteria for each of the options you want to filter by. You can filter on multiple options simultaneously.
 - Status** - Select a status from the drop-down list to display only results with the specified status:
 - Error**—Show only error documents where no errors in an error document have been edited.
 - EDI Error**—Show only error documents where an error was caused by a translation error.
 - Maintained**—Show only error documents where one or more errors in an error document have been edited, but the error document has not been resubmitted.
 - Pending Resubmit**—Show only error documents where an error document is pending resubmission.
 - Error - Resubmit**—Show only error documents where an error document was resubmitted and still contained an error.

- **Synchronous Resubmit**—Show only error documents where an error document has been resubmitted and is in progress.
 - **Read Status** - Select a status from the drop-down list to display only error documents with the specified Read/Unread status:
 - **Read**—Show only error documents that are displayed in plain typeface (they have been marked Read).
 - **Unread**—Show only error documents that are displayed in bold typeface (they have been marked Unread).
 - **Document Control Number** - Enter a partial or complete document control number to display only error documents that begin with those numbers.
- 2 Click **Filter**. The list that meets your criteria displays.
- Note:** To remove all filter criteria, click **Clear Filter**.

Viewing Translation Errors in an EDI Document

Translation errors can occur in the ST segment of an EDI document. Even though translation errors cannot be fixed and resubmitted using Error Processing (EP), EP can help you locate the problem by displaying a fragment of the EDI document that contains the error. You must fix all translation errors and resend the EDI document before Catalogue can fully process the file.

To view a translation error

- 1 Navigate to the Error Processing (document list) page to find the error document whose translation error you want to view. See “[Navigating Error Processing](#)” on page 240.

Tip: EDI documents containing translation errors are identified by a status of EDI Error. Filter the list to display only those error documents with EDI errors; from the Status drop-down list, select **EDI Error**. Click **Filter**.
- 2 Click the error document’s hyperlink in the Date/Time column. The Error Processing (document translation error) page opens.

Error Processing (document list) > Error Processing (document translation error)

Transaction Date/Time: [10/26/2007 15:36:38](#)
 Updated by User Id
 Last transaction Update/Time

EDI Translation details

Description	In Rule violation: LIN0401 = EO not found in list (EN, VC, VN, UP, SM, CM)
Character Position	
Document Control Number	160000010
Transaction Identifier	1610
LIN	LIN*1*VN*09172*EO*622356010894*CM*034*SM*10021*****

File Fragment

```
ISA*00* *01*BATCH *12*5103335555 *12*5103335555 *050307*1616*X*00401*160000010*0*P*: GS*SC*5103335555*5103335555*20071017*0933*11610*X*004010 ST*832*1610 BCT*RC*125103335555*001*****Intimate Apparel *102
LIN*1*VN*09172*EO*622356010894*CM*034*SM*10021
```

- 3 Use the information on this page to locate and correct the error in your EDI document.

- 4 Once you have corrected the error in your EDI document, delete this error document from EP. See ["Deleting Errors" on page 250.](#)
- 5 Resend your corrected EDI document.

Copying Error Processing Data to a Table

You can use the "Copy Data to Table" feature to copy to a table the details of errors that display on the Error Processing (document list) page. You can view the error processing data in the table or save the data to a CSV text file on your computer. With either method, you can copy the data from the table and paste it into another application.

Note: Be sure to set the required Internet Explorer options so you can successfully use this feature. See ["Setting Internet Explorer \(IE\) Options for Copy Data to Table" on page 98.](#)

If you do not set the IE options, you may experience inconsistent behavior when you use this feature. Sometimes the data table will appear and sometimes the page may flash momentarily, but there is no indication that your setting is not correct except that the table will not display.

The Copy Data to Table icon appears on the button bar on the Error Processing (document list) page.

To copy the error processing data

- 1 Click **Data Management > Error Processing**. The Error Processing (document list) page opens.

<input type="checkbox"/>	Date/Time	Document Control Number	Errors	Error Types	Status	Last Update Date/Time	Last Update User ID
<input type="checkbox"/>	10/26/2007 15:36:38	160000010:1610	1	1	EDI Error		
<input type="checkbox"/>	10/26/2007 15:04:13	000000067:8320067	3	3	Error		
<input type="checkbox"/>	10/26/2007 13:50:29	180000040:1840	1	1	Error		

- 2 Select the check boxes of the error documents whose data you want to copy (click again to deselect). To select all documents on a page, click the top check box to the left of the **Date/Time** column heading. Deselecting a specific error document deselects the top check box.

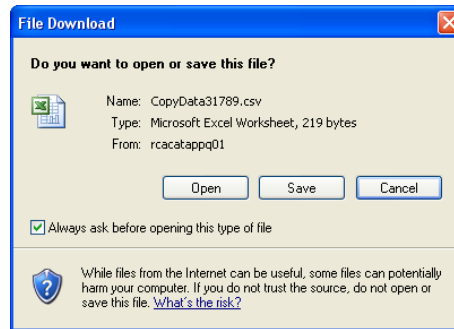
Note: You can copy one or more rows of data, up to a single page of errors at a time, with a limit of 20,000 total errors.

- 3 Click **Copy Data to Table**.

One of the following occurs:

- A table opens displaying the error processing data. Go to Step 5 (you can skip Step 4 unless the File Download dialog box opens).

- The File Download dialog box opens asking if you want to open the file or save it to your computer.



Note: The File Download dialog box will always open unless you deselect the **Always ask before opening this type of file** check box. This prevents the “Do you want to open or save this file” question from being asked every time you want to copy data to a table. Continue with Step 4.

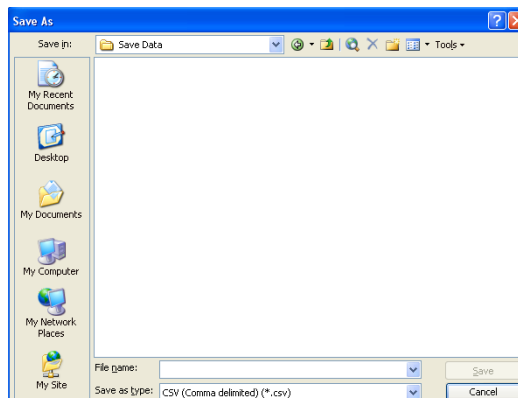
4 Do one of the following:

- **Open** - To display the error processing data in a table format, click **Open**. The table data displays.

Date/Time	Document Control Number	Error Type	Action	Selection Code	Product	GTIN	Details	Status
2014-02-06 13:48:20.0	902061348:1001:00000	-20532	Load item attributes	382	QTPPROD1	321295506021	ITEM.TEMPERATURE.TRANS	Error
2014-02-06 13:48:20.0	902061348:1001:00000	-20535	Load item attributes	382	QTPPROD1	321295106024	A uom is required for the "	Error
2014-02-06 13:48:20.0	902061348:1001:00000	-20533	Load item attributes	382	QTPPROD1	321295106028	818558 exceeds the maxim	Error
2014-02-06 13:48:20.0	902061348:1001:00000	-21900	Load item attributes	382	QTPPROD1	321295106020	Value does not match list o	Error

Go to Step 5.

- **Save** - To save the file as a CSV text file that you can open later in Microsoft Excel, click **Save**. The Save As dialog box opens.

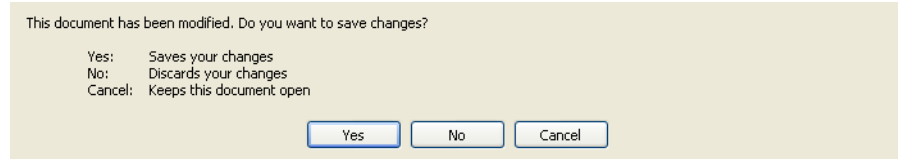


Do all of the following:

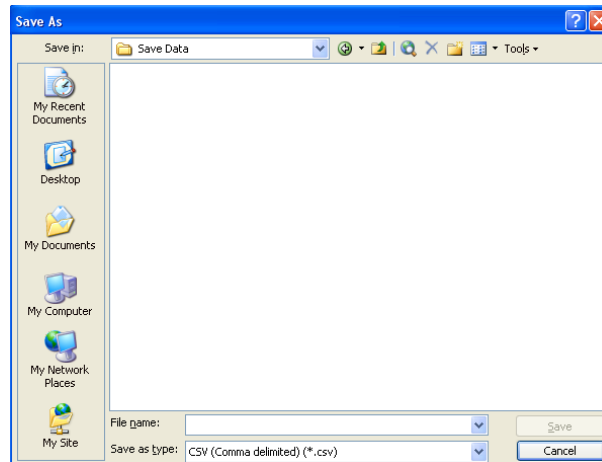
- Navigate to the location where you want to save the file.
- In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, ERRORS.csv
- Click **Save**. The file is saved to the location you selected.
- **Cancel** - To cancel your action, click **Cancel**.

- 5 Once the table is open, you can select rows and columns of error processing data to copy. When you want to close the table, click the X in the upper right corner of the window.

If you modified the table, a dialog box appears when you close the window and asks if you want to save your changes.



To save your changes, click **Yes**. The Save As dialog box opens.



Do all of the following:

- Navigate to the location where you want to save the file.
- In the **File name** box, enter a name for the file. The file name should have a .csv extension. For example, ERRORS.csv

Click **Save**. The file is saved to the location you selected.

Selecting Errors for Delete, Revert, or Edit

You can select an error document, an error type, or multiple errors to revert (to their previously submitted values) or delete. In addition, within an error document, you can select an error type or multiple errors to edit. The following sections describe how to select the errors before performing the appropriate action.

Selecting an Error Document

You can select an error document to delete or revert.

To select an error document

- 1 Navigate to the Error Processing (document list) page to find the error documents you want to delete or revert. See ["Navigating Error Processing" on page 240](#).

- 2 Select the check boxes of the error documents you want to delete or revert (click again to deselect). To select all documents on a page, click the top check box to the left of the **Date/Time** column heading.

Note: Deselecting a specific error document deselects the top check box.

- 3 Once you have selected the error document, do one of the following:

- Click **Delete**. See "Deleting Errors" on page 250.
- Click **Revert**. See "Reverting Errors" on page 253.

Selecting Specific Errors or Error Types

You can select an error type or specific errors to delete, edit, or revert.

To select an error or error type

- 1 Navigate to the Error Processing (error type list) page to find the error or error types you want to delete, edit, or revert. See "Navigating Error Processing" on page 240.
- 2 Select the check boxes of the errors or error types that you want to delete, revert, or edit (click again to deselect).
 - To select a specific error (listed in the Action column), select the check box in the Item column (to the left of the error).
 - To select all errors of a specific type (listed in the Error Type column), select the check box to the left of a specific error type.
 - To select all error types on a page, click the top check box to the left of the **Error Type** heading.

Note: Deselecting a specific error type or error deselects the top check box.

Error Processing (document list) > Error Processing (error type list)

Transaction Date/Time: 10/06/2007 14:51:39
 Errors: 3
 Updated by User Id: KIBBLES
 Last transaction Update/Time: 10/24/2007 08:51:07

<input type="checkbox"/>	Error Type	Count	Description
<input type="checkbox"/>	<input checked="" type="checkbox"/> -20808	1	Vendor cannot access another vendor's catalog
<input type="checkbox"/>	<input checked="" type="checkbox"/> -90029	2	Item already exists. If this item is not in your catalogue, it may already be owned by another manufacturer.

Item	Action	Selection Code	Product	GTIN	Details	Status
<input type="checkbox"/>	Load item attributes	001	QCM6250	674508430180	Item already exists. If this item is not in your catalogue, it may already be owned by another manufacturer.	Error
<input type="checkbox"/>	Load item attributes	001	QCM6250	674508430197	Item already exists. If this item is not in your catalogue, it may already be owned by another manufacturer.	Error

- 3 Once you have selected the errors, do one of the following:

- Click **Delete**. See "Deleting Errors" on page 250.
- Click **Revert**. See "Reverting Errors" on page 253.
- Click **Edit**. Do one of the following:
 - If you are correcting a single error, the Error Processing (error detail) page opens, See "Correcting Errors" on page 250.

- If you are editing more than one error, the Error Processing Group Edit page opens. See [“Using Group Edit to Correct Multiple Errors” on page 251](#).

Deleting Errors

You can delete an error document, groups of errors (by error type), or specific errors. You can also delete a specific attribute from a function.

Note: Any errors displayed in Error Processing are automatically purged from Catalogue after 60 days.

To delete an error document or errors

- 1 Select the error document or errors you want to delete. See [“Selecting Errors for Delete, Revert, or Edit” on page 248](#).

Note: You can not revert (recover) an error document that has been deleted.

- 2 Click **Delete**. A message asks you to confirm the deletion.
- 3 Click **OK**. The error document or errors are deleted.

To delete a specific attribute from a function

- 1 Find the function from which you want to delete an attribute by navigating to the Error Processing (error detail) page for that function. See [“Navigating Error Processing” on page 240](#).

Note: You can not revert (recover) an attribute that has been deleted.

- 2 In the Delete column, select the attribute you want to delete from the function.
- 3 Click **Delete**. A message asks you to confirm the deletion.
- 4 Click **OK**. The attribute is deleted.

Correcting Errors

The *OpenText Active Catalogue qXML Reference Guide*, which presents information about the document structures of qXML request and response documents, and the *OpenText Active Catalogue Attributes Guide* which presents information necessary for working with data attributes in qXML documents, may be helpful in correcting errors. Download these guides for assistance with rules, acceptable values, UOM lists, and so on.

Correcting a single error

To correct a single error

- 1 Find the error to correct by navigating to the Error Processing (error detail) page. See [“Navigating Error Processing” on page 240](#). Error locations are indicated in red. Details about the error are displayed.

Note: Although the function fails for the first error that the system encounters, additional fields may be highlighted indicating they are also in error. Fix all errors before resubmitting the error document. To apply the same

change to a selected group of errors, see [“Using Group Edit to Correct Multiple Errors” on page 251](#).

- 2 Enter a corrected value in the attribute containing the error or delete that attribute (see Step 3).
- 3 (Optional) To delete attributes from the function, click their check boxes in the Delete column (click again to deselect), then click **Save**.
- 4 After correcting the error, click **Save**. The error’s status will change to Maintained. To resubmit the corrected error, you must resubmit the error document that contained the error. See [“Resubmitting Error Documents” on page 254](#).

Note: If the resubmitted error document contains another error, the error document reappears in Error Processing as an unread document.

As you go through and change values, the information text changes from red to gray. For Private Accounts and unit of measure (UOM), if you provide a value which is not allowed, a warning message appears with a link. Click the link to delete the Private Account or UOM value.

Using Group Edit to Correct Multiple Errors

You can use group edit to apply the same change to a *selected group of errors*.

In most cases, it is preferable to edit the source data (for example, the item master) used to generate the batch file that you loaded into Catalogue. However, there may be instances where you need to temporarily fix data already pending at OpenText so that the data being sent to your trading partner is not delayed.

Group edit is not intended to be a full-featured edit facility. The full set of edits should be done in your item master. There are several actions that you *cannot* perform with group edit:

- You cannot add an attribute.
- You cannot delete an attribute.

The group edit feature has a revert capability that allows you to return an error document, groups of errors (by error type), or specific errors to the values they had when they were previously submitted (you cannot revert a deleted attribute). This capability is useful if you apply changes to a group of errors and do not see the results you expected. See [“Reverting Errors” on page 253](#).

To use group edit

- 1 Find the errors to correct by navigating to the Error Processing (error type list) page. See [“Navigating Error Processing” on page 240](#).
- 2 Select the errors. See [“Selecting Specific Errors or Error Types” on page 249](#).

3 Click **Edit**. The Error Processing Group Edit page opens.

4 Select one of the following edit options to apply to all of the errors you selected:

- **Set all Actions to** — changes all of the actions of the selected errors to the action you select from the drop-down list.
- **Replace action** — replaces the action you select from the first drop-down list with the action you select from the second drop-down list.
- **Search and replace** — searches for a combination of a value, a UOM, and/or an account number for the attribute you select from the drop-down list and replaces every occurrence with a new combination of a value, a UOM, and/or an account number.

5 Select the appropriate actions from the drop-down lists and/or type in the values you want to search for and replace. For examples, see [“Group Edit Examples” on page 252](#).

6 To apply these edits, click **Save**. A success message displays the number of rows that were changed.

7 Do one of the following:

- If you want to continue with additional edits for the selected group of errors, repeat Step 4.
- If you want to return to the list of errors to correct a new set of errors, click the **Back to error types** link under the success message.

Group Edit Examples

The following scenarios are examples of when you might use each of the group edit options.

Set all actions to

After reviewing a sample of the specific errors, you realize that your EDI map has generated a series of update actions for items that do not currently exist in Catalogue. You decide to set all actions (regardless of their current action) to add.

- 1 Select **Set all Actions to**.
- 2 From the drop-down list, select **Add**.

- 3 Click **Save**. A success message displays the number of rows that were changed.

Replace action

After reviewing a sample of the specific errors, you realize that all instances of particular action code need to be set to a different action code. You decide that all of the updates need to be adds while the deletes need to remain unchanged.

- 1 Select **Replace action**.
- 2 From the **Replace action** drop-down list, select **Update**.
- 3 From the **with action** drop-down list, select **Add**.
- 4 Click **Save**. A success message displays the number of rows that were changed.

Search and replace

After reviewing a sample of the specific errors, you realize that the same attribute value is in error across all functions within the error document.

In most cases, it is preferable to edit the source data (for example, the item master) used to generate the batch file that you load into Catalogue. However, there may be instances where you need to temporarily fix data already pending at OpenText so that the data being sent to your trading partner is not delayed.

For example, if the country code for the Country of Origin attribute is incorrect in your EDI map, you can change the current value within Error Processing.

- 1 Select **Search and replace**.
- 2 From the **Attribute** drop-down list, select **Country of Origin**.
- 3 Under Search for, select the **Value** check box and type the current incorrect value for the country code.
Note: Catalogue searches for the values shown in the check boxes *that are selected* (Value, UOM and Account).
- 4 Under Replace with, select the **Value** check box, and type the correct value for the country code.
Note: Catalogue values are replaced with the values shown for the check boxes *that are selected* (Value, UOM and Account).
- 5 Review the changes you are about to make.
- 6 Click **Save**. A success message displays the number of rows that were changed.

Reverting Errors

You can revert an entire error document, groups of errors (by error type), or specific errors to the values that were present when the error document was previously submitted. This capability is useful if you apply changes to a group of errors and do not see the results you expected (for example, you do a search and replace on an attribute's value and realize that you cannot proceed with the second phase of your edits).

To revert an error document or errors

- 1 Select the error document or errors you want to revert. See [“Selecting Errors for Delete, Revert, or Edit”](#) on page 248.

Note: Revert will not recover attributes that have been deleted.

- 2 Click **Revert**. A message asks you to confirm your action.

- 3 Click **OK**. The values of the errors return to the values that were present when the document was previously submitted.

Note: Revert has no effect on EDI errors since they cannot be edited using EP.

Resubmitting Error Documents

You can resubmit a corrected error only by resubmitting the error document that contains the error; therefore, be sure that all errors in an error document are corrected before resubmitting the document. A “Maintained” status means that one or more errors in the error document has been edited and saved.

Note: You cannot resubmit error documents that contain translation errors.

To resubmit error documents

- 1 Find the error documents to resubmit. See [“Navigating Error Processing”](#) on page 240.

- 2 Select the check boxes of the error documents you want to resubmit (click again to deselect). To select all error documents on a page, click the top check box to the left of the **Date/Time** heading.

Note: Deselecting a specific document deselects the top check box.

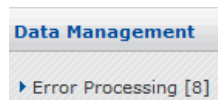
- 3 Click **Resubmit**. A message asks you to confirm your action.

- 4 Click **OK**. A message confirms the success or failure of the resubmission.

Note: An error document that contains other errors can be resubmitted successfully; however, if the resubmitted document contains another error, the error document reappears in Error Processing as an unread document.

Marking Error Documents as Read or Unread

The total number of unread errors is displayed in brackets on the navigation panel (**Data Management > Error Processing**).



On the Error Processing (document list) page, you can manage the list of documents by marking error documents as Read or Unread. The number of errors displayed in the brackets on the navigation panel updates dynamically as you read errors or mark errors as Read or Unread.

You can:

- Mark an error document **Read** to make its associated date and time plain typeface (that is, not bold). Bold typeface occurs automatically to error documents that are routed to Error Processing.
- Mark an error document **Unread** to make its associated date and time bold, as it appears before being read.

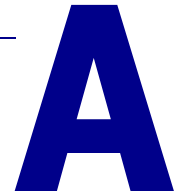
For example, one morning you may look at 50 error documents and make corrections for 48 of them. When you go to lunch, you can mark the two uncorrected error documents as **Unread** so they display in bold typeface, indicating that they have not been corrected.

Another example: Hundreds of error documents arrive displaying the same error description. You realize an attribute is unmapped in your system. You do not need to investigate the error for each item, so you can mark all of the error documents **Read** (that is, plain typeface) to indicate they do not need attention.

To mark an error document as Read or Unread

- 1** Click **Data Management > Error Processing**. The Error Processing (document list) page opens.
- 2** Select the check boxes of the error documents you want to mark as Read or Unread (click again to deselect). To select all documents on a page, click the top check box to the left of the **Date/Time** heading.
Note: Deselecting a specific error document deselects the top check box.
- 3** Click **Read** to display all selected documents in plain typeface, or **Unread** to display all selected documents in bold typeface.
Note: The total number of unread errors is displayed in brackets on the navigation panel (**Data Management > Error Processing**). The number updates dynamically as you read errors or mark errors as Read or Unread.

GTIN Number Structures



The following are the required number structures for GTIN types supported by OpenText Active Catalogue. GS1 (EAN/UCC) Company Prefix and Item or Case Reference identifiers can be of varying length, which is indicated in the diagrams below by arrows.

Note: GTIN Type must be upper case.

The following are the number structures for GTIN types supported by Catalogue.

Code	Description
EN	EAN/UCC-13 (13-digit European Article Number)
EO	EAN/UCC-8 (8-digit European Article Number)
UA	UPC/EAN Case Code
UK	EAN/UCC-14 (14-digit Shipping Container Code)
UP	UCC-12 (12-digit UPC Consumer Package Code)

EN: EAN/UCC-13 (European Article Number)

Primary GTIN type used outside of North America. Typically used for a consumer unit. This EAN is a 13-digit code that uniquely identifies a consumer unit. It uses Modulo-10 calculation.

Country Code Prefix	EAN.UCC Prefix →	Item Reference ←	Check Digit
N ₁ N ₂	N ₃ N ₄ N ₅ N ₆ N ₇ N ₈ N ₉ N ₁₀ N ₁₁ N ₁₂		N ₁₃

EO: EAN/UCC-8 (European Article Number)

Used outside of North America. Can be either a vendor- or consumer-sellable unit. This EAN is an 8-digit code used to identify a consumer unit. Assigned directly by the EAN Member Organization of that country for products that have limited barcode space. It uses Modulo-10 calculation.

Country Code Prefix	EAN.UCC-8 Prefix and Item Reference	Check Digit
N ₁ N ₂	N ₃ N ₄ N ₅ N ₆ N ₇	N ₈

UA: UPC/EAN Case Code

A UPC/EAN Case Code is a 12-digit code that identifies the manufacturer's shipping unit. It has no check-digit.

Note: Catalogue does not validate the 2-digit industry code and the 5-digit UCC Company Prefix code.

Number System Character	UCC Company Prefix	Case Code
N ₁ N ₂	N ₃ N ₄ N ₅ N ₆ N ₇	N ₈ N ₉ N ₁₀ N ₁₁ N ₁₂

UK: EAN/UCC-14 (Shipping Container Code)

Vendor sellable only. A EAN/UCC Shipping Container Code is a 14-digit code that uniquely identifies the manufacturer's shipping unit (case, module, or pallet), that is, the product and package quantity. Previously also known as SCC-14. It uses Modulo-10 calculation.

Packaging Indicator	Number System Character	EAN.UCC Prefix →	Case Reference ←	Check Digit
N ₁	N ₂ N ₃	N ₄ N ₅ N ₆ N ₇ N ₈ N ₉ N ₁₀ N ₁₁ N ₁₂ N ₁₃		N ₁₄

UP: UCC-12 (UPC Consumer Package Code)

Primary GTIN type used in North America. Typically used for a consumer unit. A UPC is a 12-digit Universal Product Code that uniquely identifies a consumer unit. It uses Modulo-10 calculation.

Number System Character	UCC Company Prefix →	Item Reference ←	Check Digit
N ₁	N ₂ N ₃ N ₄ N ₅ N ₆ N ₇ N ₈ N ₉ N ₁₀ N ₁₁		N ₁₂

For more information, visit the GS1 US website at:

http://www.gs1us.org/solutions_services/tools/check_digit_calculator

Container and Component GTIN Codes



This section defines the codes used with container and component GTINs in OpenText Active Catalogue. A GTIN's Prepack/Container Code indicates what type of container the GTIN is, or if the GTIN is a component. If the GTIN is a component, another code indicates the unit of measure of the quantity of the component in the container.

This section is organized as follows:

- ["Container/Component Designation Codes" on page 258.](#)
- ["Component Unit of Measure Codes" on page 259.](#)

Container/Component Designation Codes

Containers (for example, prepacks) and components are indicated by the following codes or descriptions in the **Prepack/Container Code** field and **Pack** column:

- **PP (prepack component)**—GTIN is a component of a container and sold only as part of a container.
 - Note:** A GTIN can be a component and not have PP designation if the GTIN can also be sold individually.
- **PU (prepack container)**—Assortment of GTINs; the components, but not the container, are consumer sellable.
- **PC (prepack container)**—Component quantities are subject to change.
- **SP (setpack container)**—GTINs are ordered as a group and sold to consumers either as a group or separately.
- **MP (multipack container)**—Consumer-sellable group of GTINs, usually the same GTIN.
- **IP (inner pack or pack)**—a logistical unit between case and each
- **CA (case or masterpack)**—may be contained in one or more DS, PL, or MX
- **DS (display shipper)**—may be contained in PL or MX
- **PL (pallet)**
- **MX (mixed module)**

Component Unit of Measure Codes

The following codes indicate the unit of measure (UOM) of the quantity of a component in a container. For example, a quantity of 1 and a UOM of GS indicates the container contains one gross of the component.

Code	Description
CA	Case
DZ	Dozen
EA	Each
GS	Gross
HC	Hundred Count
KT	Kit
PC	Piece
PR	Pair
ST	Set
TH	Thousand

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