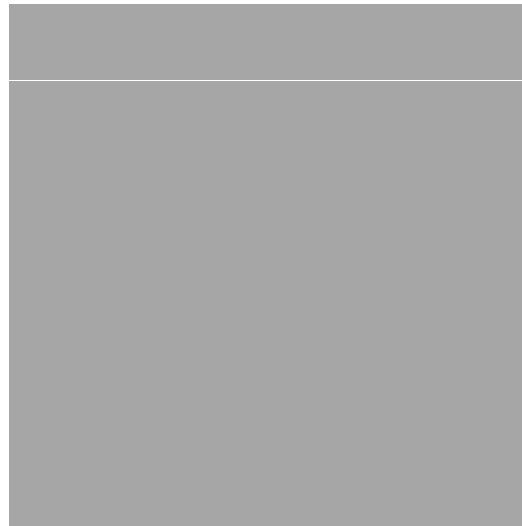
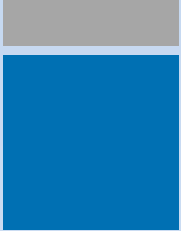


March 2012 Regional User Group

Hosted Catalogue Management Process



sciQuest.



Agenda

Catalogue Management Tool (CMT)

- How to Create CMT - Content (New, Updates, Deletes, Discontinue)
- How to Create CMT - Customer Pricing (New, Updates, Deletes)

SciQuest Supplier Portal

- How to Load CMT - Content
- How to Load CMT - Customer Pricing

SciQuest Content Management Best Practices

Content Management - CMT

Content Management Tool (CMT) - Easy-to-use Excel Spreadsheet which contains the suppliers product Catalogue content and their customer price data

	A	B	C	D	E	F	G	H	I	J
1	Supplier ID:12420675	Supplier Network Services Demo Supplier								
2	Category	UNSPSC	Part Number	Product Description	Product Size	Packaging UOM	Manufacturer Name	Manufacturer Part Number	Is Radioactive?	Is Minor Radioactive?
9	Genomic DNA Purification K	41105504	40059	Wizard Genomic DNA Purificat	100 isolations x 300microL	EA				
10	Genomic DNA Purification K	41105504	40060	Wizard Genomic DNA Purificat	500 isolations x 300microL	EA				
11	RT-PCR Kits	41106313	40061	Access RT-PCR System	100 reactions	EA				
12	RT-PCR Kits	41106313	40062	Access RT-PCR Introductory Sys	20 reactions	EA				
13	RT-PCR Kits	41106313	40063	Access RT-PCR System	500 reactions	EA				
14	Nucleic Acid Purification Kit	41105512	40064	Wizard SV Wash Solution	186ml	EA				
15	Nucleic Acid Purification Kit	41105512	40065	Wizard SV 96 Wash Solution	370ml	EA				
16	Plasmid Purification Kits	41105512	40066	Wizard Plus SV Minipreps DNA	50 preps	EA				
17	DNA Cleanup Kit Componen	41105514	40067	Vacuum Adapters	20 each	EA				
18	Nucleic Acid Purification Kit	41105512	40068	Wizard Plus SV Minipreps DNA	50 preps	EA				
19	PCR Cloning Kits	41106615	40069	pGEM-T Easy Vector System I	20 reactions	EA				

Content is shared across supplier's entire customer base

Price is specific to each customer

Excel file which is then split to into 2 .txt files to load via the Portal

1. Content.txt
2. Prices.txt

	A	B	C	D	E	F	G
1	Supplier ID:12420675	Supplier Network Services Demo Supplier					
2	Part Number	CorporateList	CorporateList	CorporateList	Customer 1	Customer 2	Customer 3
3		USD	EUR	GBP	USD	GBP	GBP
10	40059	102	29	11	1001	9998	9998
11	40060	100	395.78	11	1001	9998	9998
12	40061	100	395.78	11	1001	9998	9998
13	40062	100	395.78	11	1001	9998	9998
14	40063	109	395.78	1373	1001	9998	9998
15	40064	100	395.78	11	1001	9998	9998
16	40065	100	395.78	11	1001	9998	9998
17	40066	100	395.78	11	1001	9998	9998
18	40067	100	395.78	11	1001	9998	9998

CMT – How to complete Content

Category is a required field for all products

- **Non-scientific products** – a valid UNSPSC code can be used instead of providing category, the application will map to a category during the file “validation” step
- **Scientific products** – require both UNSPSC code and category

Categories serve many important roles in SciQuest procurement applications:

- End users find it easier to navigate to intended products in search results
- Customers can adjust the visibility of catalogs using categories
- Customers routinely use categories in workflow as well as spend analysis

	A	B	C	D	E	F	G
1	Supplier ID:12420675		Supplier Network Services Demo Supplier				
2	Category	UNSPSC	Part Number	Product Description	Product Size	Packaging UOM	M
9	Genomic DNA Purification Kits	41105504	40059	Wizard Genomic DNA Purification	100 isolations x 300microL	EA	
10	Genomic DNA Purification Kits	41105504	40060	Wizard Genomic DNA Purification	500 isolations x 300microL	EA	
11	RT-PCR Kits	41106313	40061	Access RT-PCR System	100 reactions	EA	
12	RT-PCR Kits	41106313	40062	Access RT-PCR Introductory Sys	20 reactions	EA	
13	RT-PCR Kits	41106313	40063	Access RT-PCR System	500 reactions	EA	
14	Nucleic Acid Purification Kit Components	41105512	40064	Wizard SV Wash Solution	186ml	EA	

CMT – How to complete Content

Requires 3 supporting documents to complete the Content tab of the CMT.

- CMT_Categories and Attributes

	A	B	C	D	E
1	Hierarchy Level 1	Hierarchy Level 2	Category Name	UNSPSC	Vertical
1798	Molecular Biology	Molecular Biology Kits	Genomic DNA Purification Kits	41105504	Lab Supplies

	A	B	C	D	E	F
1	Supplier ID:12420675	Supplier Network Services Demo Supplier				
2	Category	UNSPSC	Part Number	Product Description	Product Size	Packaging UOM
9	Genomic DNA Purification Kits	41105504	40059	Wizard Genomic DNA Purification	100 isolations x 300microL	EA
10	Genomic DNA Purification Kits	41105504	40060	Wizard Genomic DNA Purification	500 isolations x 300microL	EA
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12	RT-PCR Kits	41106313	40062	Access RT-PCR Introductory Sys	20 reactions	EA
13	RT-PCR Kits	41106313	40063	Access RT-PCR System	500 reactions	EA
14	Nucleic Acid Purification Kit Components	41105512	40064	Wizard SV Wash Solution	186ml	EA

- CMT_Reference_Packaging UOM and Product Size Guidelines
- CMT_Instructions and User Guide – documents whole process

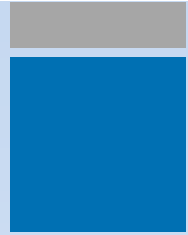
CMT – How to complete Content - UOM

- Packaging **UOM** and Product Size are important attributes that tell a user how much of a product is being offered and how is it configured
 - E.g. Packaging UOM = '12/PK', Product Size = '100mL' indicates that this item is being sold as a pack of twelve containers, each container having 100mL of product
- Specific values in “Packaging UOM and Product Size Guidelines” document
- If not mapped to SciQuest standard values:
 - Packaging UOM – Defaults to “EA”
 - Product Size – Defaults to “<blank>”
- Critical information for:
 - Comparing like products
 - Assessing detailed unit cost

Num	Part Number	Description	UOM	Product Size
1	Var_01	Methanol, ACS (Four bottles, each with 1L product)	4/PK	1L
2	Var_02	Methanol, ACS (Four bottles, each with 1L product)	PK	4X1L
3	Var_03	Methanol, ACS (Four bottles, each with 1L product)	PK	4L

When this data is loaded, it will appear in search results as;

Catalog # ▲	Product Description ▲	UOM ▲	Product Size ▲
Var_01	Methanol, ACS (Four bottles, each with 1L product)	4/PK	1L
Var_02	Methanol, ACS (Four bottles, each with 1L product)	PK	
Var_03	Methanol, ACS (Four bottles, each with 1L product) 🌈	PK	4L



CMT – How to complete Content - Product Flags

- Product Flags (Y or N), examples:
 - Radioactive 
 - Hazardous 
 - Recyclable 
- Additional details may be provided
 - Hazardous: Multiple detailed attributes, most common are
 - Health Hazards (list of values)
 - Physical Hazards (list of values)
- Customers Use Product Flags
 - Product views and user views
 - Workflow and approval routing

CMT – How to complete Customer Price

Content must be Validated / Imported / Syndicated before the Price can be added.

If the supplier attempts to load the price before the content, the system will generate an error.

	A	B	C	D	E	F	G
1	Supplier ID:12420675		Supplier Network Services Demo Supplier				
2	Category	UNSPSC	Part Number	Product Description	Product Size	Packaging UOM	M
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14	Nucleic Acid Purification Kit Components	41105512	40064	Wizard SV Wash Solution	186ml	EA	

Ready | CMT_12420675_20090909 | 100%

	A	B	C	D	E	F	G
1	Supplier ID:12420675		Supplier Network Services Demo Supplier				
2	Part Number	CorporateList	CorporateList	CorporateList	Customer 1	Customer 2	Customer 3
3		USD	EUR	GBP	USD	GBP	GBP
10	40059	102	29	11	1001	9998	9998
11	40060	100	395.78	11	1001	9998	9998
12	40061	100	395.78	11	1001	9998	9998
13	40062	100	395.78	11	1001	9998	9998
14	40063	109	395.78	1373	1001	9998	9998
15	40064	100	395.78	11	1001	9998	9998
16	40065	100	395.78	11	1001	9998	9998
17	40066	100	395.78	11	1001	9998	9998
18	40067	100	395.78	11	1001	9998	9998

Ready | Price_12420675_20090909 | 100%

CMT – Steps to load the Content

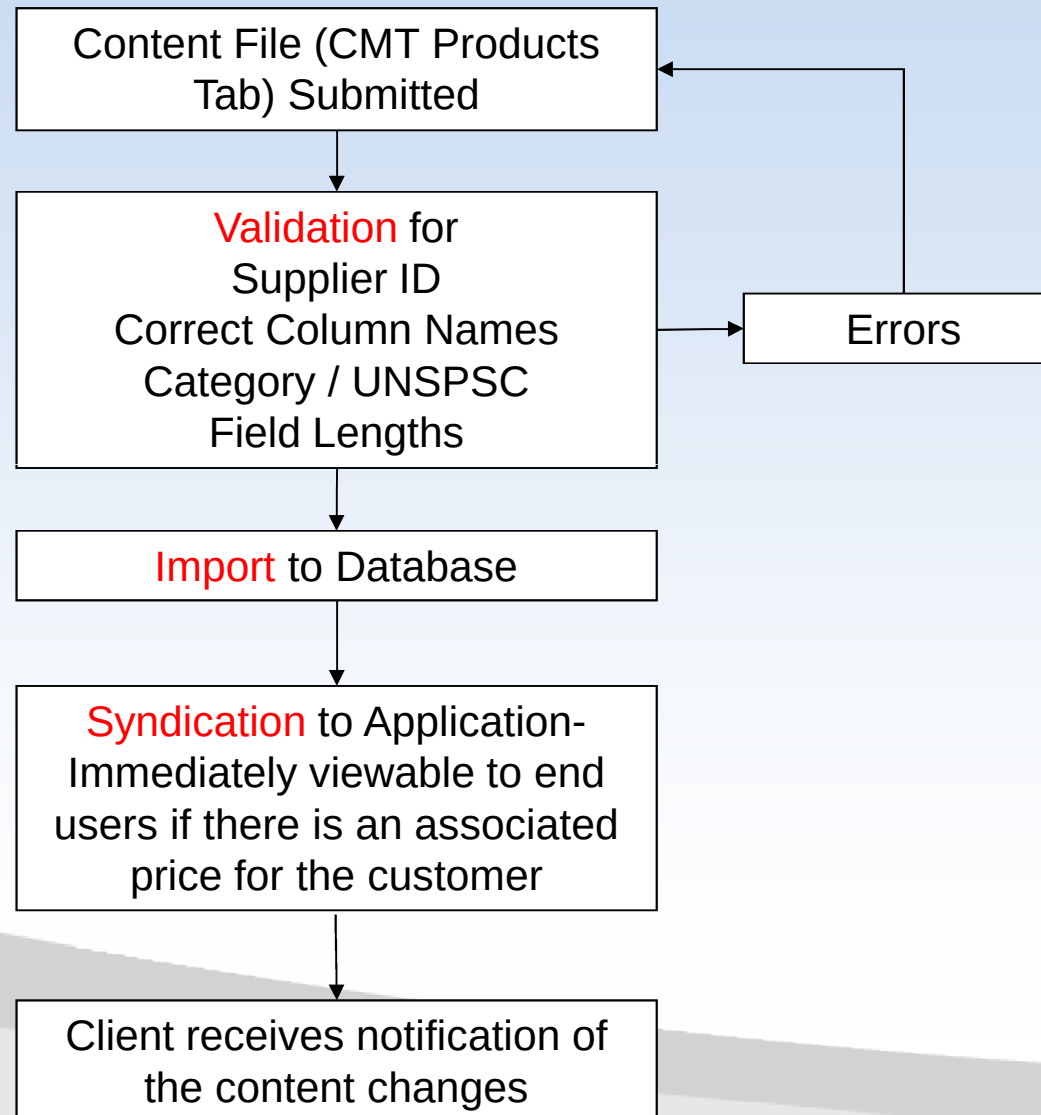
Loading the CMT – the steps required by the supplier

- Content (Validate, Import/Syndicate)
 - Update/Add
 - Replace All - Discontinue
 - Replace All - Delete
 - Reactivate

SciQuest
Supplier
Portal

The screenshot shows the 'Data File Submission' form in the SciQuest Supplier Portal. The top navigation bar includes 'history', 'item/price' (highlighted), 'profile', 'user mgt.', and 'reports'. Below this is a secondary bar with 'submit data' (highlighted), 'items', 'price sets', 'extracts', 'configuration', 'uom setup', and 'attribute search'. The form itself has a 'Supplier/Catalog' dropdown, a 'Submission Type' dropdown (currently showing 'Prices - Update/Add'), and a 'File Name (Maximum file size is 30Mb)' field. Below these is a 'Description (Shown to Buyer):' text area and an 'Internal Note' field. A list of submission options is visible on the right, including 'Prices - Update/Add', 'Prices - Replace All', 'Content - Update/Add', 'Content - Replace All (Discontinue items not in file)', 'Content - Replace All (Delete items not in file)', 'Content - Discontinue', 'Content - Delete', 'Content - Reactivate', 'Misc - Images', 'Misc - Change Part Numbers', and 'Misc - Chemical Structures'.

CMT – Steps to load the Content



CMT – Steps to load the Content

Reviewing Validation Step:

1. Correct any errors during the Validation Step
2. Re-submit the corrected file
3. Once Validation step is 'complete', click to Import/Syndicate

home | profile | user mgt. | organization setup | **item/price** | sales orders | reports | more >>

dashboard | **search submissions** | submit data | items | price sets | extracts | configuration | uom setup | attribute search

Details | History

Details

Submission No. 571210 [edit...](#)

Supplier/Catalog Supplier Network Services Demo Supplier (12420675)

Submission Type Content - Update/Add

Categorize Content All Categories

Using

Submitter Donna Yeaw

Created by SQ ✓

Status

Submission Status Processing

Start Date 9/18/2009 9:30 AM

Submission Step Status

Validation Error [Close Submission...](#)

Import Not Planned

Syndication Not Planned

Validation Results

Type	Rows	File	Submission Link
Original Input	8	CMT_12420675_20090909 v3.txt (1k)	
Validation (All Rows)	8	SupplierValidation571210.zip (1k)	
Errors/Warnings	1/5	SupplierErrorsAndWarnings571210.zip (1k)	
Existing Products	7	SupplierExistingProducts571210.zip (1k)	Import...

Content Information

Est. New	Est. Updates	Est. Removes	Syndication Status	Syndication Status Date
0	7	0		

home | profile | user mgt. | organization setup | **item/price** | sales orders | reports | more >>

dashboard | **search submissions** | submit data | items | price sets | extracts | configuration | uom setup | attribute search

Details | History

Details

Submission No. 571516 [edit...](#)

Supplier/Catalog Supplier Network Services Demo Supplier (12420675)

Submission Type Content - Update/Add

Categorize Content All Categories

Using

Submitter Donna Yeaw

Created by SQ ✓

Status

Submission Status Processing

Start Date 9/18/2009 12:36 PM

Submission Step Status

Validation Complete [Import Original File...](#)

Import Not Planned

Syndication Not Planned

Validation Results

Type	Rows	File	Submission Link
Original Input	7	CMT_12420675_20090909 v3.txt (1k)	
Validation (All Rows)	7	SupplierValidation571516.zip (1k)	
Errors/Warnings	0/4	SupplierErrorsAndWarnings571516.zip (1k)	
Existing Products	7	SupplierExistingProducts571516.zip (1k)	

Content Information

Est. New	Est. Updates	Est. Removes	Syndication Status	Syndication Status Date
0	7	0		

Import Confirmation

Click "Import and Syndicate" to import and syndicate the Original Import File. Click "Import only" to import the file.

[Import and Syndicate](#) [Import only](#) [Cancel](#)

Most common error:

1. Given UN/SPSC and Category Name are not sufficient to categorize this object → add a category

CMT – Steps to load the Customer Price

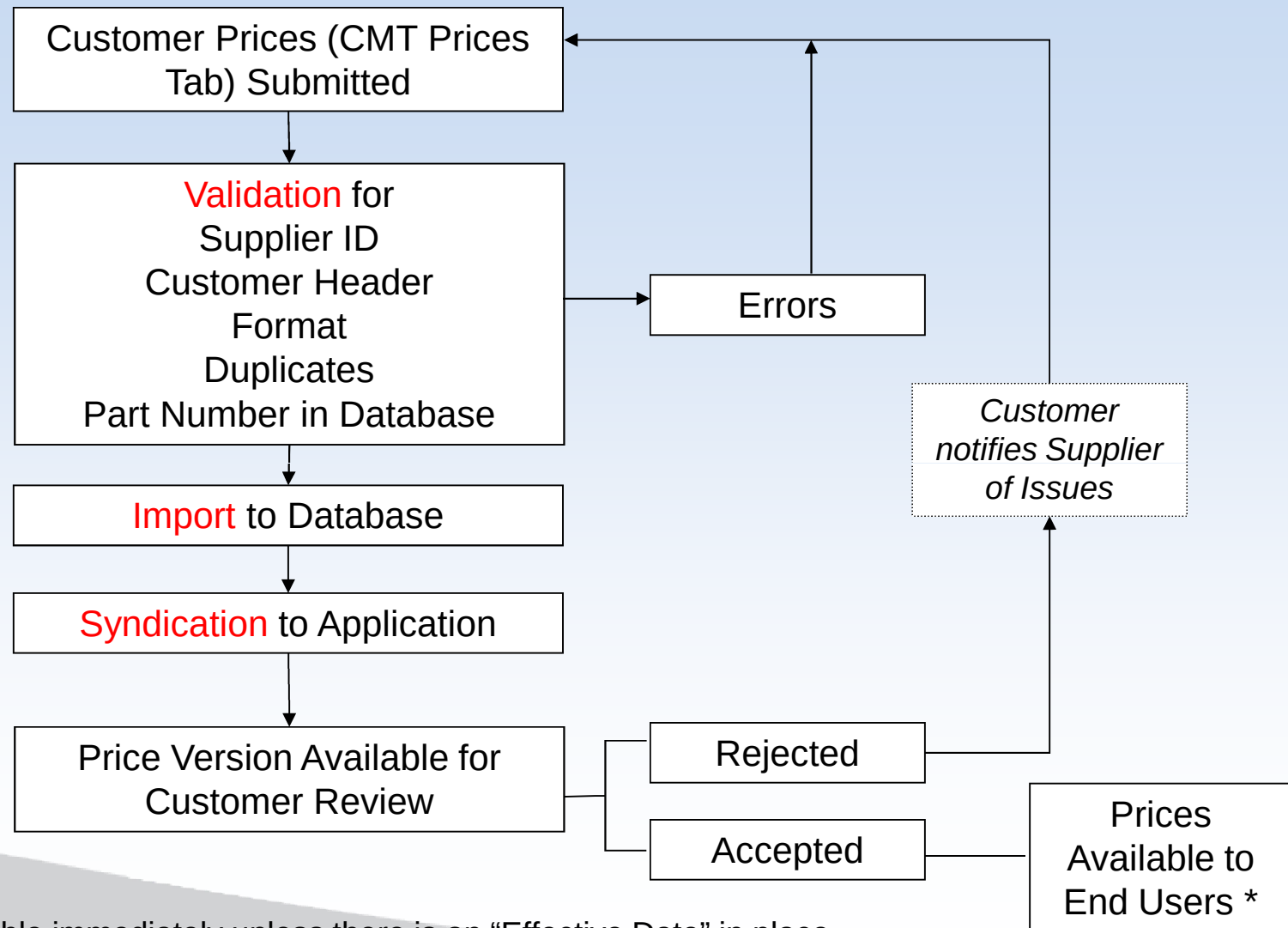
Loading the CMT – the steps required by the supplier

- Customer Prices (Validate, Import/Syndicate)
 - Update/Add
 - Replace All

SciQuest
Supplier
Portal

The screenshot shows the 'Data File Submission' form in the SciQuest Supplier Portal. The navigation bar at the top includes 'history', 'item/price' (highlighted), 'profile', 'user mgt.', and 'reports'. Below this, a secondary bar contains 'submit data' (highlighted), 'items', 'price sets', 'extracts', 'configuration', 'uom setup', and 'attribute search'. The main form area has a title 'Data File Submission'. On the left, there are fields for 'Supplier/Catalog', 'Submission Type' (highlighted with a red box and containing 'Prices Available Beginning'), 'File Name (Maximum file size is 30Mb)', 'Description (Shown to Buyer):', and 'Internal Note'. On the right, a dropdown menu is open, showing a list of submission types: 'Prices - Update/Add', 'Prices - Update/Add', 'Prices - Replace All', 'Content - Update/Add', a separator line, 'Content - Replace All (Discontinue items not in file)', 'Content - Replace All (Delete items not in file)', 'Content - Discontinue', 'Content - Delete', 'Content - Reactivate', 'Misc - Images', 'Misc - Change Part Numbers', and 'Misc - Chemical Structures'.

CMT – Steps to load the Customer Price



- Prices will be available immediately unless there is an “Effective Date” in place.
- Accept/Reject is done against the entire price file. There is no partial approval/rejection.

Content Management - Best Practices

Set Email Preferences within SciQuest Supplier Portal

The screenshot shows the 'User Settings' interface with the 'Email Preferences' tab selected. The page has a header with tabs: 'User Settings', 'Permissions', 'Sales Order Access', and 'History'. Below this is a sub-header with tabs: 'User Identification', 'Personal Settings', 'Roles', 'Email Preferences' (active), and 'Navigation Setup'. The main content area lists ten email notification options, each with a checkbox to its right. A yellow 'Save' button is located at the bottom right of the list.

Notification Type	Checkbox
User Registration pending approval	☐
Internal Order Fulfilled	☐
Price File Approved/Rejected/Live	☐
Submission Validation Complete	☐
Submission Validation Error	☐
Submission Import Complete	☐
Submission Import Error	☐
Submission Syndication Complete	☐
Submission Syndication Error	☐
Sales Order received from a customer	☐

Save