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Australia

The Global Language of Business

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Document Purpose

The purpose of this document is to provide users a guide on how to use Publisher. The user guide includes simple instructions and screenshots on how to execute various functions.

The document is intended for use by suppliers using Publisher to create/maintain product data in National Product Catalogue.

Document control

Document version and change history

Version	Date	Nature of change / comments	Editors
2.40	May 14th 2019	Updated Screenshots to reflect new Summary panel Updated section 1.1 to include option to download all item fields on one Excel worksheet	K.Lai
2.30	August 30th 2018	Updated Section 1.4 Upload Items from an Excel file. Included new section on how to download CSV Report	K.Lai
2.20	August 21st 2017	Updated screenshots with new Publisher Interface	K.Lai / A.Đinh
2.10	June 1st 2017	New features include: • New global search bar (user guide - Part 1) • Hit list download (user guide – Part 1) • New hierarchy navigation widget (user guide – Part 2) • Reset CIC status (user guide – Part 2)	K.Lai / A.Đinh
2.00	April 12th 2017	Updated user guide with new Publisher Interface	K.Lai / A.Đinh
1.00	n/a	Introducing the Publisher user guide	GS1 Australia

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Disclaimer

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1.0 IMPORT AND EXPORT ITEMS

The application allows you to carry out mass uploads and downloads of trade item data using Excel files. You can download item data, change it and then upload the data again. This is especially recommended for mass-updates. You can also download an Excel template that you can use to create new item data. The system supports 2007 (xlsx) formats.

The data can be released during the upload process. The file can contain single items or hierarchies.

1.1 Download your Data in Excel
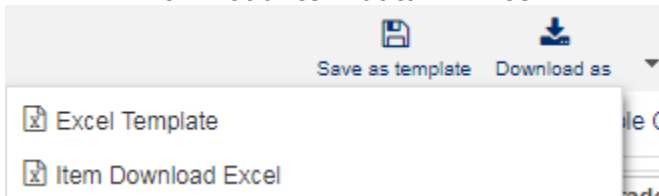
To export item data, proceed as follows:

- First, select the item(s) from the hit list
- Click the Download option in the hit list function bar

The Download function

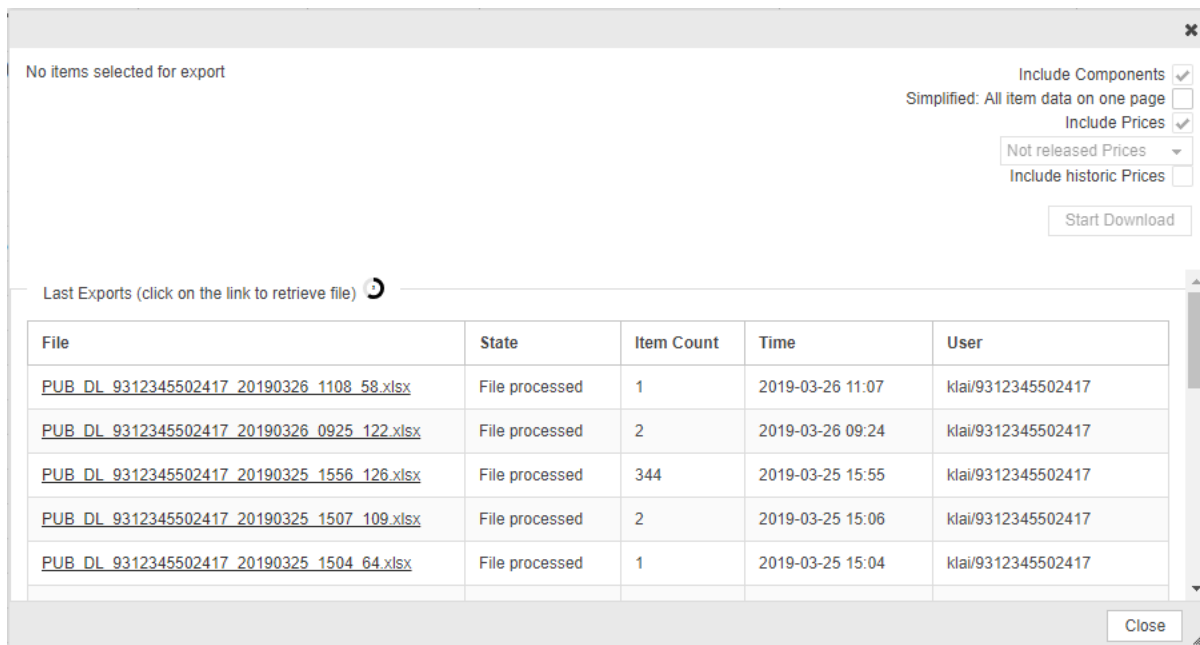The download menu offers you two different options.

- Download an empty Excel template (.xlsx format)
- Download item data in Excel

Download options

To download items in Excel select "Item Download Excel". For details on templates see the relevant chapter.

The download dialogue now opens which allows you to select the required export format – Excel 2007 (.xlsx) file. Please note that the appearance of the dialogue may differ depending on which browser you use.
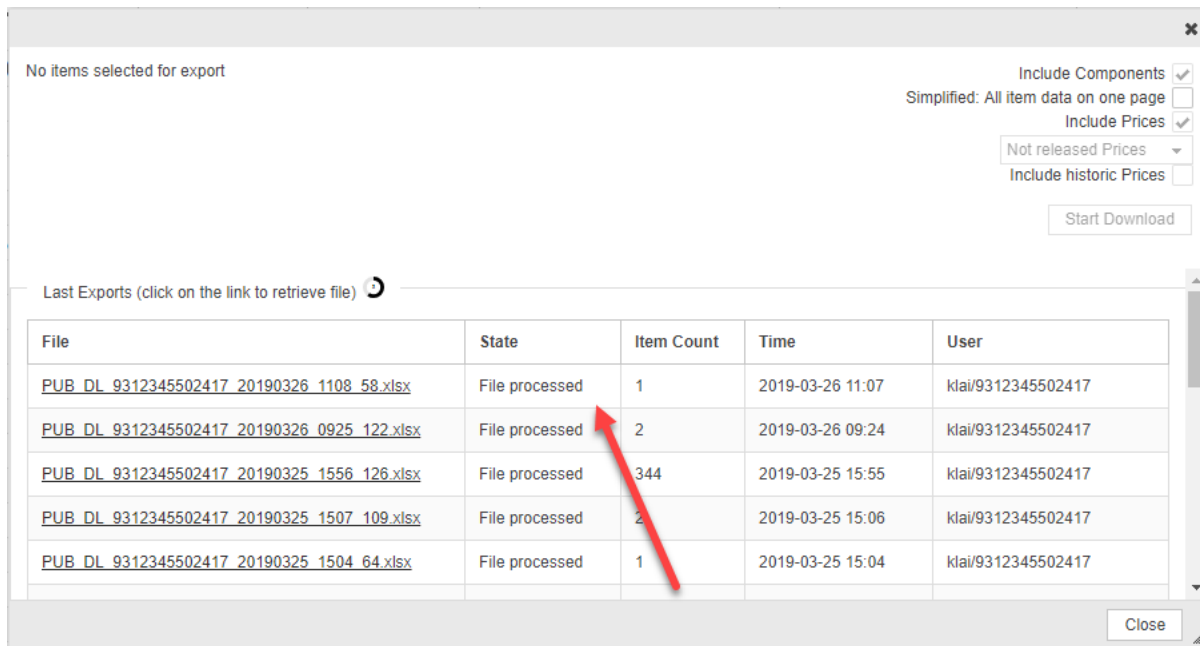
Download dialog

- Specify whether you wish to export just the selected item or its components as well.
- Specify whether you wish to export the prices. If so, you can also decide if you wish to include the historical price items in the export as well as released prices. Please note that the option "not released prices" may also include working versions.
- By default, an excel download have item data downloaded in several excel worksheets grouped by category within the file. If you want all item data to exist in just one Excel worksheet, select the option *Simplified: All item data on one page*.
- Then click the option *Start download*.
- The excel file will appear in the *Last download* area at the bottom. When the Column *State* shows 'Initialized' the export is still in progress. Depending on the number of selected items, it may take some time to process the Excel file. The download is prepared in the background. You can close the download window and continue with other tasks. If you open the download menu later you will notice that the Excel file has been created and has now the status "success" and can now be downloaded by clicking on the file name.
- The Excel file contains all selected items and - depending on the specifications you made previously - may also contain the corresponding components and all price items linked with the items and their components, including historical price items.

Due to the size restrictions (no more than 65536 lines are allowed) of Excel 97 we do not recommend using this format for mass exports. If you wish to export a large number of items, please use Excel 2007.

1.2   Download History (Last Downloads)

The bottom part of the Download dialog displays a list of the last downloads to be carried out. In addition to the file name and number of exported items, this area displays the time of the export and the user who triggered it as well as the amount of the items included in the download file. The *State* column tells you whether the export was successful.

File	State	Item Count	Time	User
PUB_DL_9312345502417_20190326_1108_58.xlsx	File processed	1	2019-03-26 11:07	klai/9312345502417
PUB_DL_9312345502417_20190326_0925_122.xlsx	File processed	2	2019-03-26 09:24	klai/9312345502417
PUB_DL_9312345502417_20190325_1556_126.xlsx	File processed	344	2019-03-25 15:55	klai/9312345502417
PUB_DL_9312345502417_20190325_1507_109.xlsx	File processed	2	2019-03-25 15:06	klai/9312345502417
PUB_DL_9312345502417_20190325_1504_64.xlsx	File processed	1	2019-03-25 15:04	klai/9312345502417

Download window

The most recent download is always displayed at the top of the list. If the maximum number of entries for the list is reached, the oldest entry is removed.

To download a copy of an Excel file generated during a previous download, proceed as follows:

- Open the *Download* dialog.
- Click the required file name in the download history.

A dialog box opens; it allows you to either open the file or save it to your computer. Please note that this dialogue may differ depending on your browser settings.

1.3   Download Excel Template

You can also download an empty Excel file which you can then use as a template for creating new items.

To export an empty Excel file, click on the download option and select the file format you wish to have the template (xlsx -Excel 2007).

Download Excel Template option

- A window opens which allows you to choose a download location for the export file here.
- The Excel file is created. Its structure is the same as the structure of an Excel export file, but this file is empty.
- The Excel template contains all attributes, both at Base Item and Packaging Item level.

1.4   Upload Items from an Excel File

When entering data for the Excel upload, it is of crucial to have the correct format in the Excel cells. Please see detailed information in chapter 'Restrictions and Format Regulations'. It is strongly recommended that you familiarise yourself with these rules before working with the Excel Interface.

Please note that the dialog window can differ slightly depending on the browser used and its language settings.
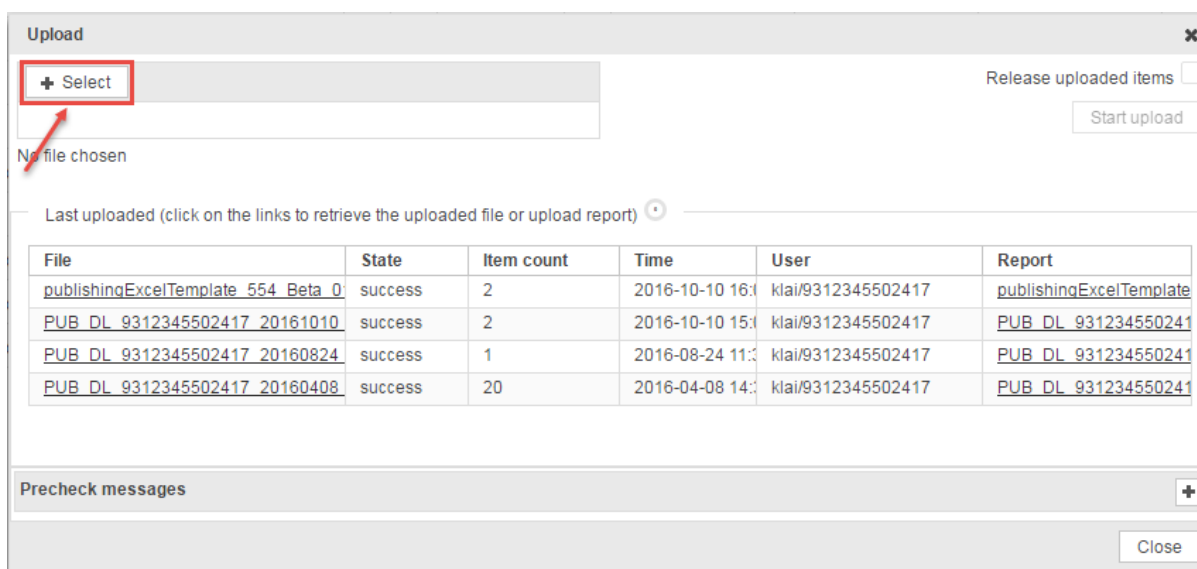
To import items using an Excel file, proceed as follows:

- Click the *Upload* option in the hit list function bar.

Upload option

- A dialog opens; you can select the prepared Excel file. To do so, click Choose file. This will open the browser.


Upload dialog

- Specify whether you want the uploaded items to be released automatically following the import. To do so, tick the checkbox "Release uploaded items".
- Click *Start upload*.
- Before importing the items into the system, the system carries out a *preliminary check* to make sure that the format of the Excel file is correct.
- Any errors in the file - such as wrong file format or incorrect format for data- will be listed under Precheck messages.
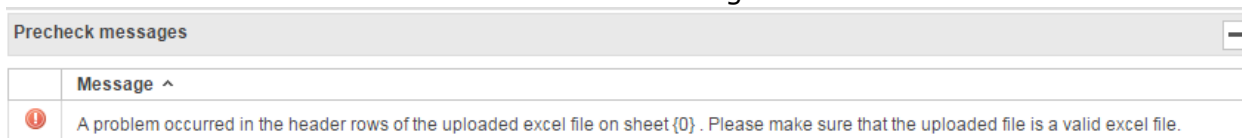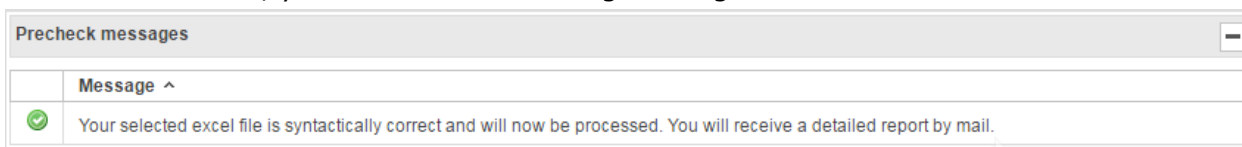

Precheck messages – errors

If the error is known by the system, the precheck message can also identify the cell within the Excel sheet that has caused the file to errpr. Navigate to the specific cell to fix the error and reupload.
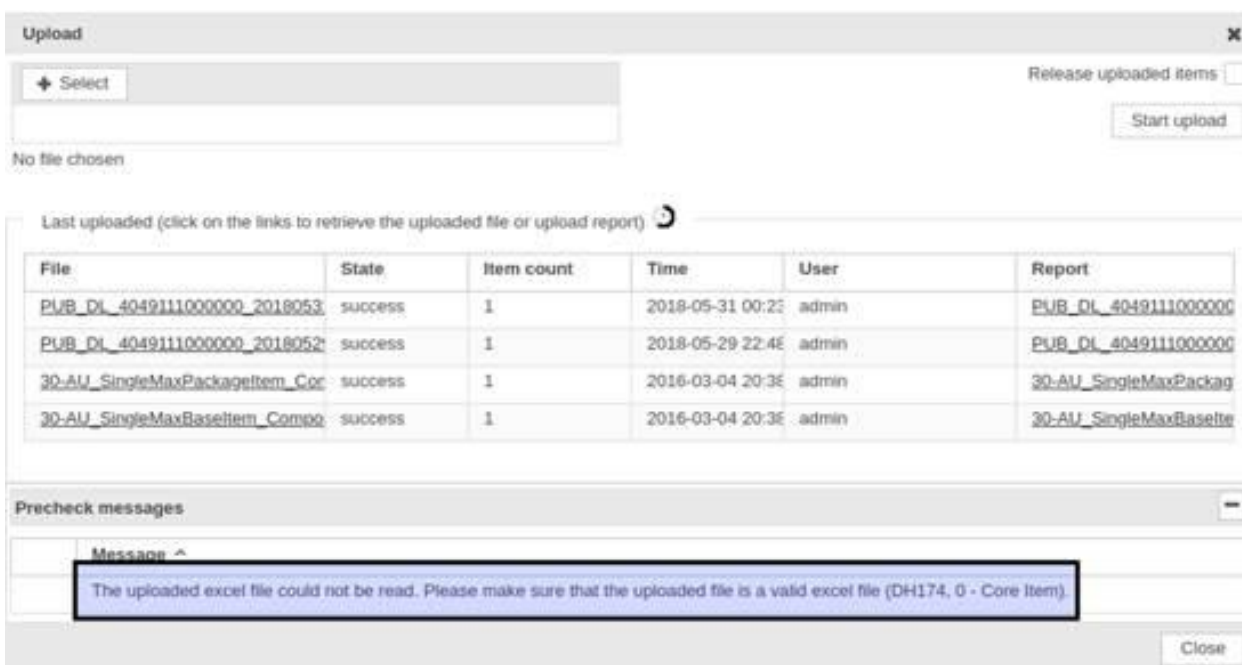
Precheck messages – identifies the cell causing the error.

Another common Excel error user can receive is **"The uploaded excel file could not be read. Please make sure that the uploaded file is a valid file"**. This could be related to cells in the Excel file containing '#N/A' or '#VALUE' values. In such scenario, the excel will not upload. Please carefully check the uploaded Excel file again. If you still cannot identify the error, please contact your NPC Customer Service Advisor for assistance.

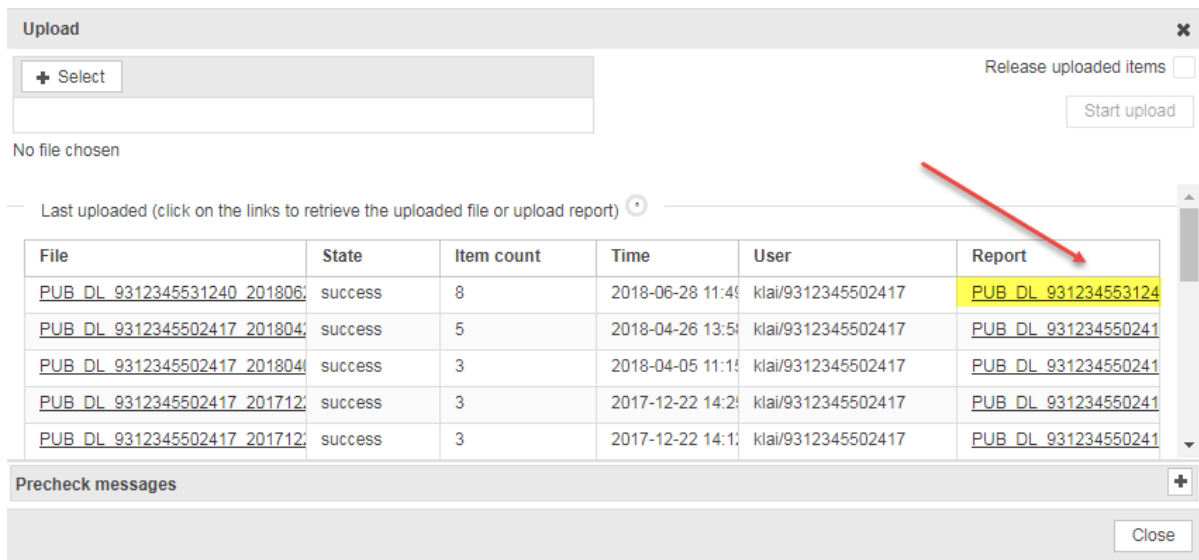If the file is correct, you will see the following message:

Precheck messages - success

A number of pre-checks are performed upon upload that check:

- whether the primary keys are included on each sheet
- whether the item is included on each sheet
- whether each attribute is defined only once in the document
- whether attributes unknown to the system are included in the file
- whether all required attributes are filled
- whether there are major hierarchy consistency violations

1.4.1 Upload Report

Following the import, an Upload Report is generated. This is also emailed to the user. To access the upload report, please click on the link in the column report and you will be able to open or save the report directly.

Downloading the Upload Report

This is an example of an Upload Report user will receive. There are 5 sections in the Upload report:

1. Validation result
2. Common Import Information
3. Item-Import
4. Price Import
5. Item-Publication (not used)

```
GTIN      GLN TM  PriceId Store Status   Operation  Validation Message  Level  Rule Id
0761210006850 9377770552417    036   SUCCEEDED  RELEASE If Variant(s) are provided, they must appear in the Trade Item Description. ERROR  020-009-010
0761210006850 9377770552417    036   SUCCEEDED  RELEASE If VARIANT(s) are provided, they would normally appear in the tradeItemDescription  WARN  020-009-001
0761210006850 9377770552417    036   SUCCEEDED  RELEASE Ordering Lead Time would normally be provided if GTIN is flagged as an Order Unit.  WARN  105-006-001
================================================================================
Common Import Information
----------------------------------
Import started at        : 2017-01-24T05:19:00
Import started by        : klai
Report-Filename          : UPLOAD_01.protocol.txt

Item-Import, Mode: STORE
----------------------------------
# items                  : 1
# errors                 : 1
# warnings               : 0
# updated                : 1
# unchanged              : 0

Item-Publications
----------------------------------
# of publications        : not available
# of successfully published: not available
# of not published       : not available
================================================================================
```

Upload Report

The Validation result of the report gives more detailed information about possible errors and/or warnings and indicates whether the item upload was stored successfully or not in the system. Below is a definition for each column in the Upload Report

Column	Definition
GTIN	The item(s) uploaded
GLN	The information provider's GLN
TM	The target market of the GTIN
Store (3 status)	SUCCEEDED: Item upload was successful FAILED: Item upload failed UNCHANGED: No changes to the item data updated
Operation (3 status)	VALIDATE: Item was validated RELEASE: Item was released UPDATE: Item record has been updated
Validation Message	Description of the validation message what is the error/warning
Level (2 status)	ERROR: A block error with the data. Data must be corrected before it can be sent to Data Recipient WARN: A warning only. Data can be still sent to Data Recipient, but it is suggested to be fixed.
Rule Id	A unique number identifying the validation rule or a system error number. If you see 'SYS', then this is a system generated error. It is not a GS1 AU/NZ data recipient identified requirement. The error must fixed and the error cannot be disabled.

Common Import Information lists the general data for the upload such as when it was started and the file name.

Import Info	Definition
Import started at	Time when the item upload was executed
Import started by	The user who executed the upload
Report-Filename	The name of the file uploaded

The Item-Import lists details about the item such as:

Item-Import	Definition
# items	Number of items uploaded in total
# errors	Number of items uploaded with errors
# warnings	Number of items uploaded with warnings
# updated	Number of items updated and stored into the Publisher UI
# unchanged	Number of items unchanged

If user is also uploading price, the Price-Import list details about the price:

Price-Import	Definition
# of prices	Number of prices uploaded in total
# of successful prices	Number of prices successfully stored
# of failed prices	Number of prices failed to store
# of unchanged prices	Number of prices unchanged

1.4.2 Upload History (Last Uploaded)

The bottom part of the *Upload* dialog shows the uploaded Excel files and corresponding upload reports for the last imports as links in a list. In addition to the file name and number of imported items for each upload, the import time and user who triggered the import are displayed. The *State* column tells you whether the import was successful.

The most recently imported file is always displayed at the top of the list. If the maximum number of entries for the list is reached, the oldest entry is removed.

1.4.3 Restrictions and Format Regulations

It is crucial that any file uploaded to the application complies with certain format rules; otherwise they will not be processed. The application will always create Excel files which fully comply with these rules (e.g. Excel template and Excel download file).

1.4.3.1 Excel Versions

The following Microsoft Excel formats are supported:

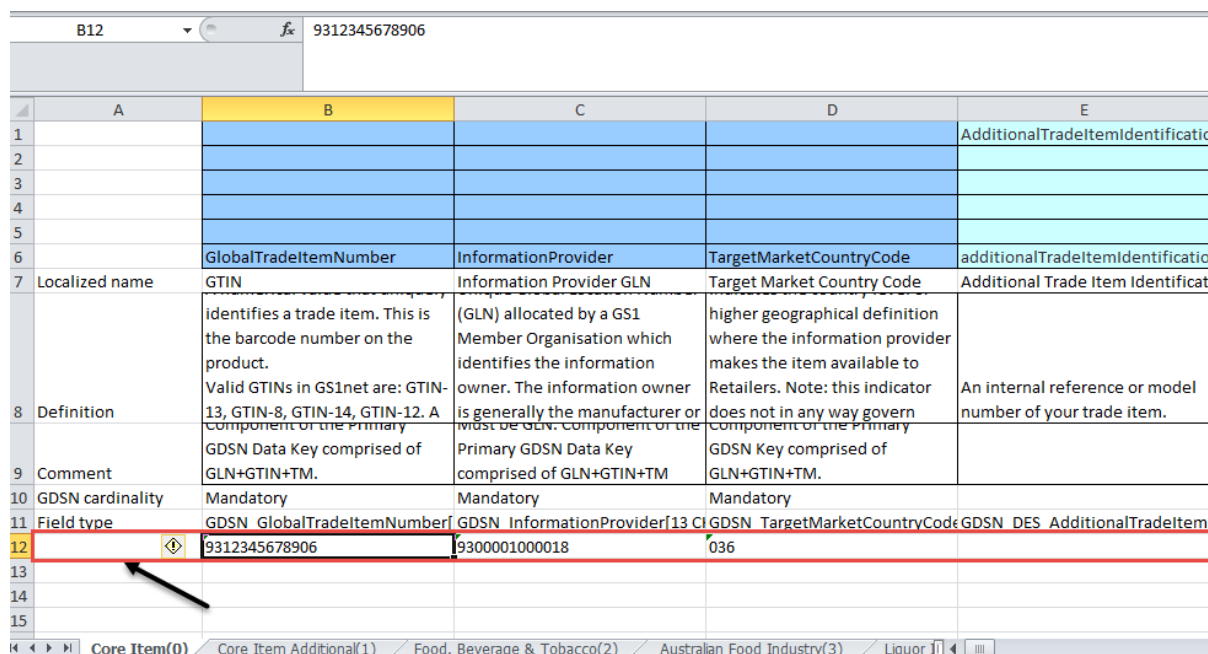- MS Excel 2007 (XLSX)
- MS Excel 2010 (XLSX)

There are no restrictions regarding rows and columns for Excel 2007

1.4.3.2 Format

When entering data for upload it is of crucial importance to ensure the correct format is selected for the Excel cells. Please do **not** split or merge cells within the Excel file.

Please use the format which is given in the Excel template in <u>the first row</u> (only the first row is formatted correctly due to technical restrictions in Excel). You can copy the row to keep the correct formatting.

When exporting an Excel file, all <u>populated rows</u> are formatted correctly as well. You can use this file as well to ensure an error free format.

First or populated rows formatted correctly

1.4.3.3   Rules for upload file

Please **only** use the Excel master template to upload item data. Uploading data using another file will result in a failure of the upload process. The following basic rules apply to all Excel files.

- The primary keys (GTIN, GLN, Target Market) <u>must</u> be repeated on EACH worksheet in columns B, C and D respectively.
- The values that are to be transmitted must be entered in row 12 and lower. There must be one row per GTIN. Due to size constraints in an empty template only row 12 is formatted correctly! Please make sure to format all following cells correctly. In an Excel download of data stored in the data pool only the rows containing values are formatted correctly for the same reason.
- The first column of the uploaded file must always remain empty. Any data entered in this column will interfere with the correct processing of the file.
- The uploaded values always overwrite the content already stored in the data pool. Transmitting an attribute with no value will result in the stored values being deleted from the data pool. A deletion of an attribute which was populated before means that the values in the new version in the data pool will be deleted
- Each extension is on a separate worksheet and named accordingly

Columns and/or worksheets that are not needed can be deleted from the file. However, it is absolutely mandatory that the structure of the data remains intact. E.g. a value and corresponding unit of measure must both be transmitted together. Any change to the structure of the file will result in an error.

1.4.4 Structure of an Excel file

A worksheet carrying trade item data has 11 fixed rows containing attribute information.

11 fixed rows

Do not make **any changes** to the data in the first eleven rows.

The first three lines are colour coded according to the cardinality of the respective attributes: Mandatory attributes or attribute groups = blue

GlobalTradeItemNumber	InformationProvider
GTIN	Information Provider GLN

Optional attributes or attribute groups = green

additionalTradeItemIdentificatio	additionalTradeItemIdentificatio
Additional Trade Item Identificat	Additional Trade Item Identificat

Dependent attributes or attribute groups = yellow

value	unitOfMeasure
Price Comparison Measurement	Price Comparison Measurement

The Excel template and the Excel download files contain different kinds of sheets.

Core Item(0)	Core Item Additional(1)	Food, Beverage & Tobacco(2)	Australian Food Industry(3)	Liquor Industry(4)	Healthcare
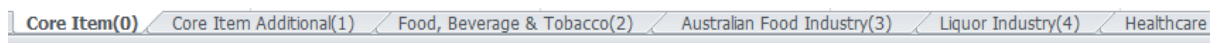
1.4.4.1   Trade Item Sheets

These sheets contain the actual trade item data. The data in the Excel file is organized in number of work sheets. The structure corresponds to the Graphic User Interface (GUI).

A trade item is uniquely identified by the combination of the GDSN attributes - Global Trade Item Number, Information Provider GLN, and Target Market Country Code. These three attributes must be included and populated on every sheet. There is one row per item in the sheet.

1.4.4.2   Price Item Sheet

Prices are uploaded from the sheet "Prices". Only prices can be uploaded in Excel. It is not possible to create price relationships or price conditions via Excel upload. A price item is uniquely identified by the combined primary key consisting of Price-ID, Information Provider, and Relationship-ID. The trade item to which the price belongs to is identified by the combined key consisting of Global Trade Item Number, Information Provider, and Target Market. There can be multiple price records for the same trade item.

1.4.4.3   Types of Attributes

Repeatable attributes

To upload repetitions of an attribute, please copy the entire column for the attribute and enter the next highest number in the square brackets []. The default value is "[0]" for the attribute. To create a repetition enter [1], [2] for the second repetition etc. The maximum number of repetitions is defined in the data structure. Please note that repetitions must always be transmitted together and in the correct order. Any change to the order of the repetitions or splitting them up in the Excel file will lead to an upload failure.

For example: two repetitions of Handling Instructions Code

Repeatable attributes

1.4.5 Upload Components

It is possible to add components via Excel Upload in one step.

To upload components please ensure the components are included in the Excel file as individual trade items, i.e. the primary key – GTIN, GLN and Target Market – are populated on each worksheet.

In addition, the worksheet Components must be populated.

Components tab in the Excel template

The columns headed Related Item [0] need to be populated to indicate the hierarchy

Related Item[0]	Related Item[0]
gtin	amount
GTIN of next lower item	Amount of next lower level items
-	-
-	-
Integer; 14	Number

Populating components

For column GTIN, enter the GTIN of the related item, i.e. the next lower level item. For amount, enter the amount of times this item is contained in the next higher item of the hierarchy. Please ensure that the data is entered in the correct row.

To add more than one relation for the same item, copy the columns and adjust the number in the brackets, i.e. for a second related item Related Item [1] etc.

|			Related Item[0]	Related Item[0]
GlobalTradeItemNumber	InformationProvider	TargetMarketCountryCode	gtin	amount
GTIN	Information Provider GLN	Target Market Country Code	GTIN of next lower item	Amount of next lower level item
identifies a trade item. This is the barcode number on the product. Valid GTINs in GS1net are: GTIN-13, GTIN-8, GTIN-14, GTIN-12. A	(GLN) allocated by a GS1 Member Organisation which identifies the information owner. The information owner is generally the manufacturer or	higher geographical definition where the information provider makes the item available to Retailers. Note: this indicator does not in any way govern		
Component of the Primary GDSN Data Key comprised of GLN+GTIN+TM.	Must be GLN. Component of the Primary GDSN Data Key comprised of GLN+GTIN+TM	Component of the Primary GDSN Key comprised of GLN+GTIN+TM.	-	-
Mandatory	Mandatory	Mandatory	-	-
GDSN_GlobalTradeItemNumber[	GDSN_InformationProvider[13 Cl	GDSN_TargetMarketCountryCode	Integer; 14	Number
09325345500550	9312345505470	036		
19325345500557	9312345505470	036	09325345500550	6
29325345500554	9312345505470	036	19325345500557	4

The Excel Template

Once the data is uploaded, the system is updated with the new trade items and components.

1.5 Download CSV report

You can download data from your catalogue into a CSV Report. It is customisable which allows you to select only the fields you require in the CSV Report.
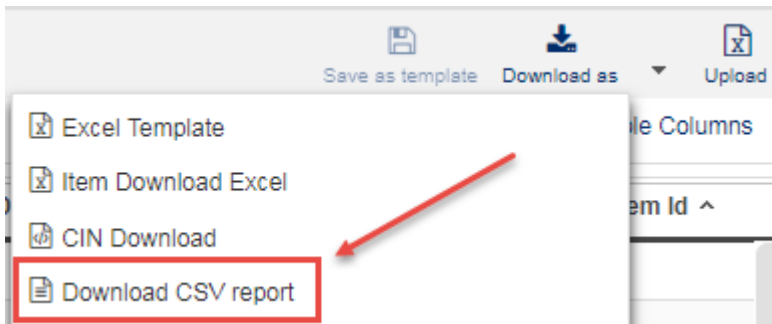
Download CSV report
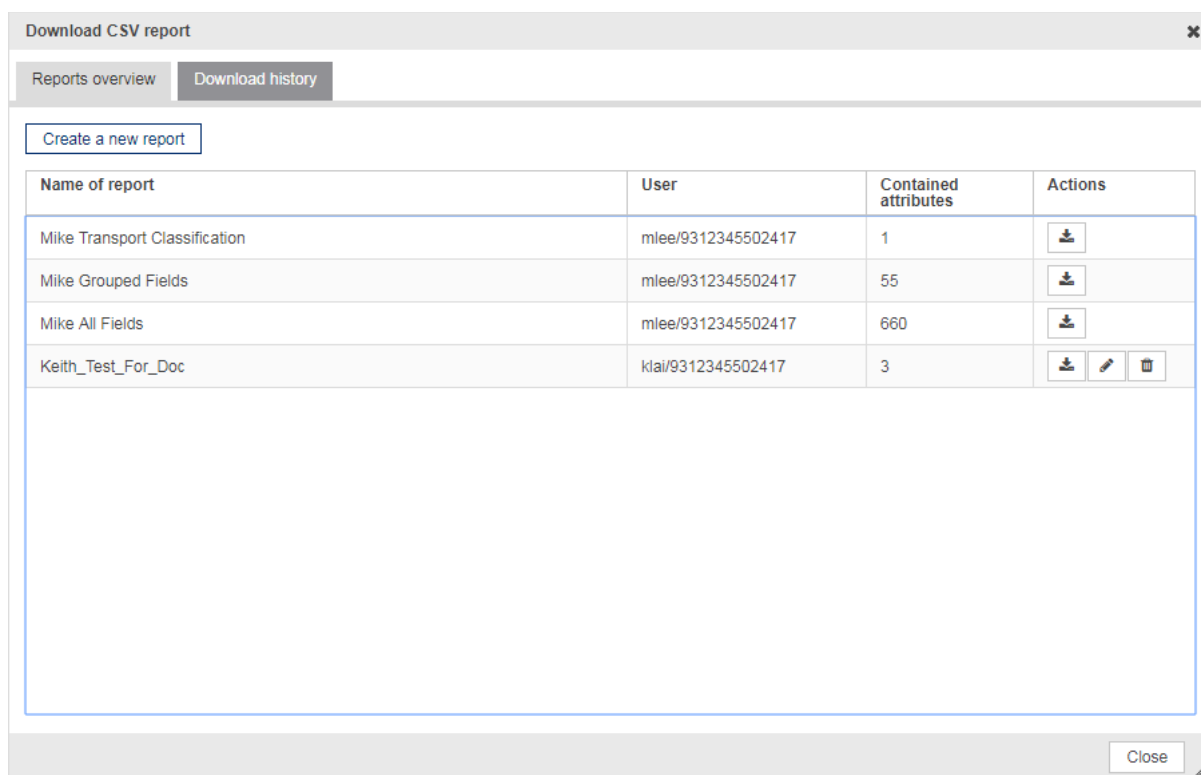
The CSV Report window

1.5.1 Create a new report

Before you can download a CSV Report, you must first create a report. This is a template which you can customise to the fields you want to see in the CSV Report. You can create many different templates depending on your need. To create a report, click on the 'Create a new report button':

Create a new report

- Insert a name for the report

- The left column consists of the attributes available. You can search for attributes using the search field just above the column.

- The right column will contain the list of attributes you selected to appear in the CSV Report.

CSV Report

- Select the available attributes from the left column and click the right arrow button to add to the right column

CSV Report

- Clicking the Add All button will move all available attributes to the right column. This means the CSV Report will contain all fields selected.

Selecting all fields

- Once you have selected the fields you require, click save.

- A new report will be created.

New Report Created

1.5.2 Column References

Some attributes are grouped together. This is based on the header name of the particular modules used in the Publisher UI. For example: Duty Fee Tax Information contains all tax related information.

Some attributes are grouped

If an attribute is part of a group, you cannot select the individual attributes to include in the CSV report. All attributes that are part of that group will be included as separate columns within the report

For example, searching for tax related attributes will only return one result, Duty Fee Tax Information. This is the header name of the module. By selecting Duty Fee Tax Information, it will include all tax related attributes in separate columns in your CSV Report.
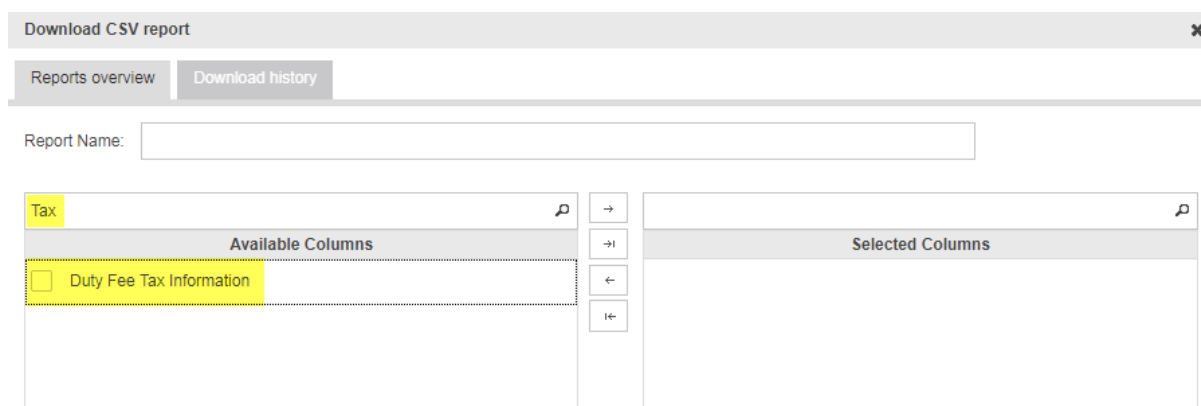
Searching for tax related attributes will return the Header group only

Publisher/Recipient Attribute name	CSV Report column selector
Duty Fee Tax Type Code	Duty Fee Tax Information
Duty Fee Tax Type Description	Duty Fee Tax Information
Duty Fee Tax Agency Code	Duty Fee Tax Information
Duty Fee Tax Rate	Duty Fee Tax Information
Duty Fee Tax Exempt Party Role Code	Duty Fee Tax Information

All tax attributes part of the group will be included

For the full list of attributes and modules available in the column, please refer to the CSV Report Column Reference document in the Publisher Training webpage.

1.5.3 Downloading a CSV item report

- From the Item Hit list, select the items you want to download into the CSV Report
- From the Download menu, select "Download CSV Report"
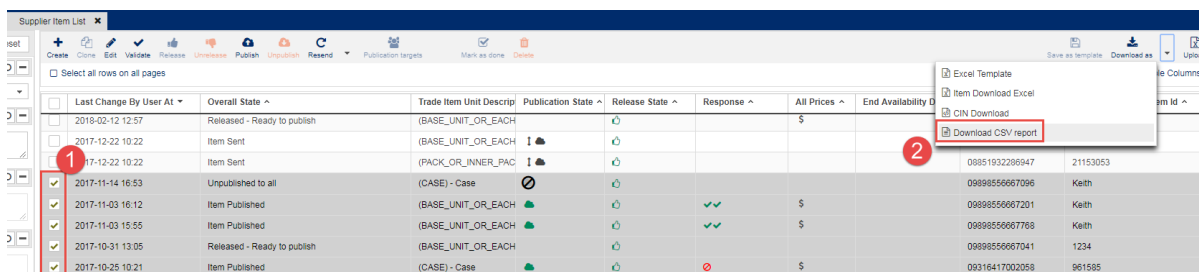
Select the item(s) to download into the CSV Report

- Click the download button from the Report created
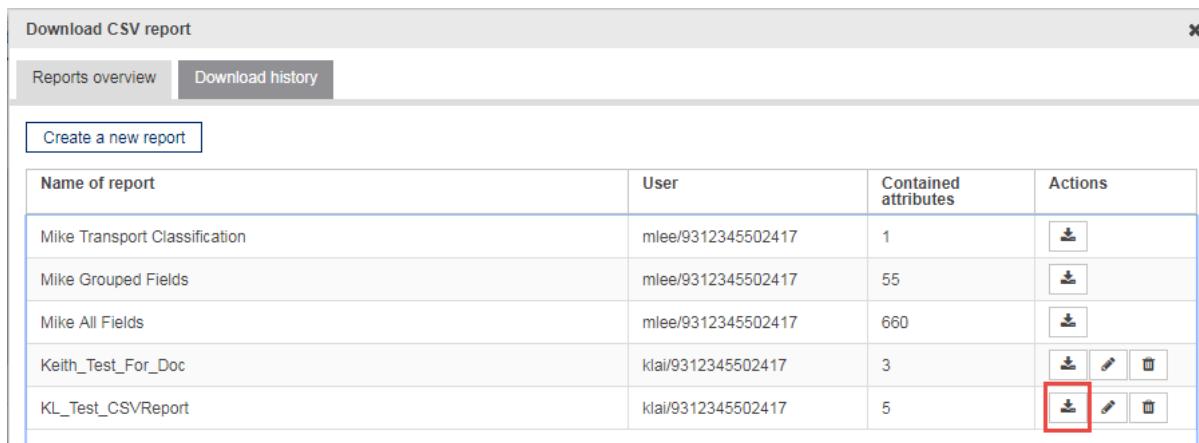
Download the CSV Report

- The download will begin showing an "Initialized" state in the Download history tab.
- When the download is complete, the status will change to "Success".
- Download and save the CSV Report by clicking on the filename.

Successful CSV Report download

- The CSV Report can be imported into Excel using it's import function.

- Click on the "Data" tab from the Excel menu and select "From Text/CSV" to import the data.

- Data imports successfully into a readable format

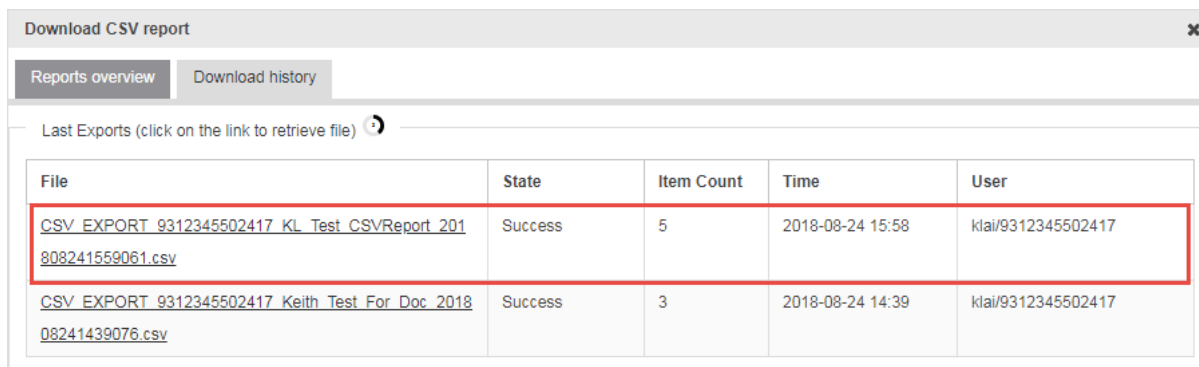| Column1	Column2	Column3	Column4
Trade Item Description/tradeItemDescription/tradeItemDescriptionValue[en]	GTIN	Additional Trade Item Identification/AdditionalTradeItemIdentification[0]/additionalTradeI	Additional Trade Item Identification/AdditionalTradeItemIden
Mike Hierarchy NoDespatch	09898556667041	1234	SUPPLIER_ASSIGNED
Mike Hierarchy NoDespatch	09898556667096	Keith	SUPPLIER_ASSIGNED
M ike H i e r a r c h y No Des patch	09898556667201	Keith	SUPPLIER_ASSIGNED
Mike Hierarchy NoDespatch	09898556667768	Keith	SUPPLIER_ASSIGNED
CANADIAN CLUB SPIRIT CANADIAN WHISKEY 20 YEAR OLD 750 ML GLASS CANADI	09316417002058	961585	SUPPLIER_ASSIGNED

CSV Report imported into Excel

2.0 RELEASE ITEMS

General information

An item must have the **Released** state (*Released ready to Publish*) in order to be able to be finally published to the data pool and to the business partner/s (see 'Publish items').

The release state indicates that the item data has been validated successfully and has reached a good quality state, i.e. mandatory data is complete, all data contents have the right format, and content interdependencies are observed and consistent throughout all hierarchies the item belongs to.

Before this minimum data quality has been achieved you are editing the **Working Version** of the item which is still incomplete. This also applies to hierarchy inconsistencies. If an item is part of a component hierarchy it can only be released if all the contained (smaller) components are released already. All its relations to other items in this hierarchy are validated, as well, i.e. all items of every hierarchy the item is a part of are validated together.

Please note: Every hierarchy must contain at least one orderable unit. Often a base item is not an orderable unit. A packaging item needs to be added before releasing the hierarchy. A hierarchy without an orderable unit will not be sent out by the system.

Releasing can be done either from the hit list or the item editor.

The release state can be revoked from the hit list, which may have to be necessary for physical deletion of an item (see 'Revoke the Release of an Item').

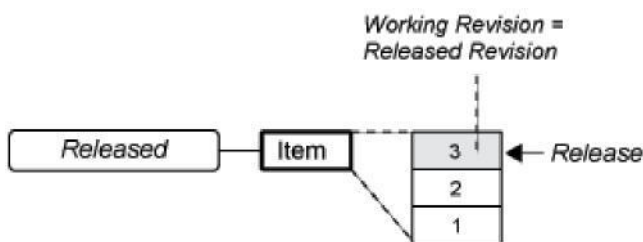## 2.1 Working Version and Released Version

Every time you save the item after creating or editing, the system adds a new version storing the current contents. The most recent version – that is the latest processing state - is called the **working revision**.

Only the **working revision** can be edited.
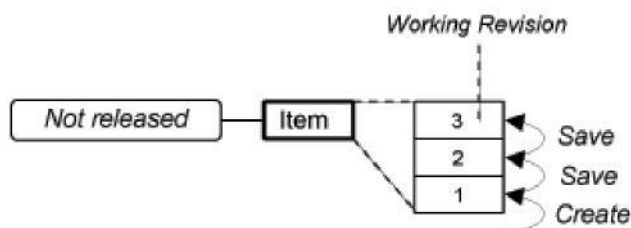
Newly created item that has been edited and saved twice

When validated successfully the working version can be **released to the data pool**, in order to be published later on.


Newly created and released item

Please note: There can be a maximum of one released version for every item. Depending on the working context, this can be the most recent version, in which case the working version and the released version are identical; however, it may also be one of the older versions; in the event you have changed and saved the released version - or even the published version – therefore creating a new working version (compare Overall state table)
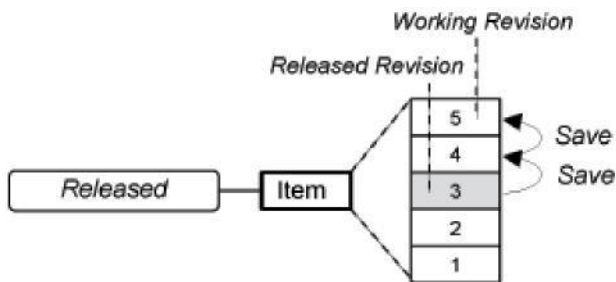
Released item that has been edited twice after release

When you release an item, the "Released" flag is automatically set for the working version. If an older version was released previously of this item, the "Released" flag is moved from the older version to the current working version.
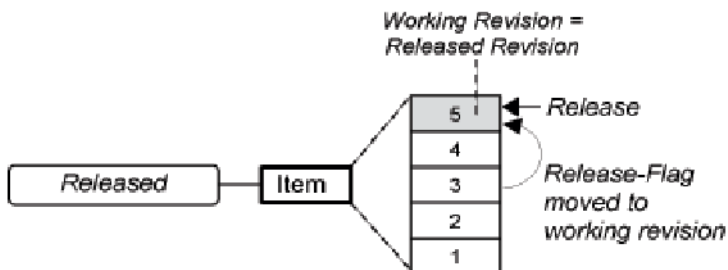
Newly released item

Summary: A working version can be of one of the following Overall item states:

- **Draft new item**: new item never released yet,

- **Draft Item update – pending release**: released item never published yet, edited and saved
- **Item update – pending release**: published item, which has been edited and saved again.

2.2   Release Items from the Hit List

You can release one or more items from the hit list.

- First, select the item/s from the hit list. Note, that selected non-related items may be released separately. If an error occurs that prevents releasing one of the items, the other items may still be released, if free of errors.
- Click the *Release* option in the hit list function bar.

Release option

- If the item/s belong to a hierarchy (or hierarchies) the user can determine whether only the item or the entire hierarchy is to be released.
- Selecting **'*Release Hierarchy'*** will release all items in the related hierarchies; the related items do not need to be selected separately. If an error occurs in any of the items the entire hierarchy will not be released.
- Selecting **'*Release Single Item'*** will release only the items you have selected. Please note that the items of all relating hierarchies are validated together. An error in any of those items will also prevent releasing the single item. Additionally, the selected item will not be able to be released if there is a validation rule that prevents the release of individual items in a hierarchy.
- The data is validated to make sure that it is complete, correctly formatted, and consistent. Errors will be displayed in the validation report.
- If everything is correct, the most recent version of every selected item is released.
- The items are given the processing status *Released – Ready to publish*.
- If an item was already published and later changed, releasing it will change the status from Item update-pending release back to item published.

Please note the following:

We recommend saving base items first and releasing them in a later stage e.g. when the whole item hierarchy has been created and saved. According to the GDSN standard, at least one of the components or the item itself must be an orderable unit. Releasing solely the base item leads to an error as far as this item is not an orderable unit.
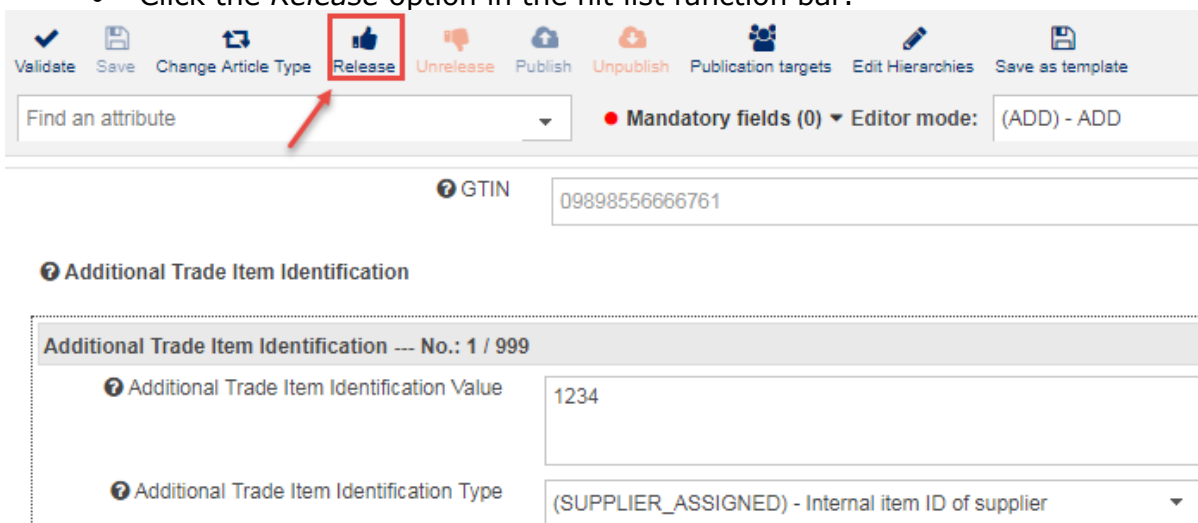
2.3 Release an Item from the Item Editor

You can release an item from the item editor.

- Select the item from the hit list
- Click the *Edit* option in the function bar or double click the item in the hit list

Edit option

- The item now opens in a separate tab.
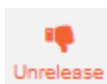- Click the *Release* option in the hit list function bar.

Release option

- Now select whether you wish to select only the item or the entire hierarchy.
- The item is released.

2.4 Revoke the Release of an Item

An item can be unreleased from the hit list or the item editor. Only items that are released but not published can be unreleased.

Unrelease option

To unrelease via the hit list, select the item(s) and click on the unrelease button. To unrelease from the item editor, choose the item and either click the edit button or double click the item. The item editor now opens.

Unreleasing will always happen from the upper packaging items down to the base units. The unrelease dialogue shows the hierarchy items that will be unreleased. If the selected item has parent items, the parent packaging items will also be unreleased:
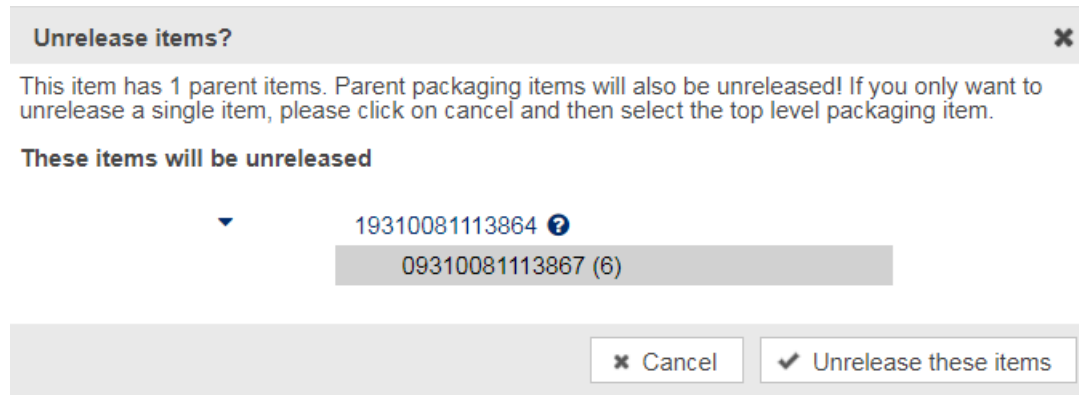
Unrelease dialog

The current item will be marked with a grey bar and all items in the hierarchy will be displayed in the dialogue to provide the user a clear understanding of which items will be affected by the unrelease option.

You will be asked whether you really want to proceed. If an item was released but not published, it will receive the status "Draft new item" after unreleasing. If you wish to unrelease an item that is already published, you have to revoke the publication first. Once the publication is revoked, it can be unreleased. The item will now receive the status Unpublished to all – Draft item.

3.0 PUBLISH ITEMS

General information

Item data must be published in order to be sent out to the Source Data Pool. Only from there it is available to the retailers, who have subscribed to this data.

To ensure quality, item data can only be published with status Released. But for publication, data is validated again to make sure that it is consistent throughout the hierarchy, and that a publication is not done to non-permitted recipients.

Errors are shown in the Validation Report underneath of the hit list or item details, and must be corrected before publishing can finally take place.

An item successfully published receives the overall item state Item Published. (Also see: 'Overall State, Release State and Publication State'). It is marked with the green cloud icon:

Item Published

In general, an item should be published only once. For changes or corrections to be sent later on, the new working version needs just to be released, but not published again.

Publishing hierarchies

If an item is part of a hierarchy, the publication must be done on the highest packaging or hierarchy level that is relevant to the respective retailer. Publication will then include all lower item levels contained. If the highest hierarchy level deviates for different retailers, the publication must be done on all these levels, i.e. more than once (see 'Publishing an Item as Part of a Hierarchy').

Unpublish

A published item can be unpublished to stop data delivery to the data pool and the respective recipients (see 'Unpublish Items').

If unpublished to all, the item receives the overall item state Unpublished to all, and is marked with the grey cloud icon:

Item unpublished

If the unpublished item is still part of another published hierarchy, it receives the overall item state Item unpublished to all – still sent, and is it is marked with the grey cloud with an arrow icon:

Item unpublished to all – still sent

3.1   Select Recipients

Publication can be done either from the hit list (see 'Publish Items from Hit List'), or from the item editor (see 'Publish an item from Item Details').

Both approaches use the same publication dialog to either choose or add the retailer/s or recipient/s (see 'Select Publication Targets').

Item data can be published here to a list of chosen retailers. Of course, it can still be published to additional retailers afterwards.

A list of business partners (possible recipients or publication targets) is defined for the supplier by administration and is then offered in the publication dialogue. This list could also have been accessed during item creation (see 'Possible Item Recipients'), in order to activate possibly retailer-specific validations right at the beginning of data maintenance. Possible recipients could have been added or deactivated, and this selection can now even further be adjusted here.

3.2   Publish Items from Hit List

Select the items you want to publish in the item hit list and click the *Publish* option in the hit list function bar.

Publish Option in the hit list function bar

This opens the publishing dialog to choose or add publication target. See 'Select Publication Targets' for detailed instructions. Please note: Only items that are already released can be published.

3.3   Publish an Item from Item Editor

Select the item from the hit list and open it by either double clicking on the entry or clicking the edit button.

Go to the function bar on the top, and click the blue Publish option.
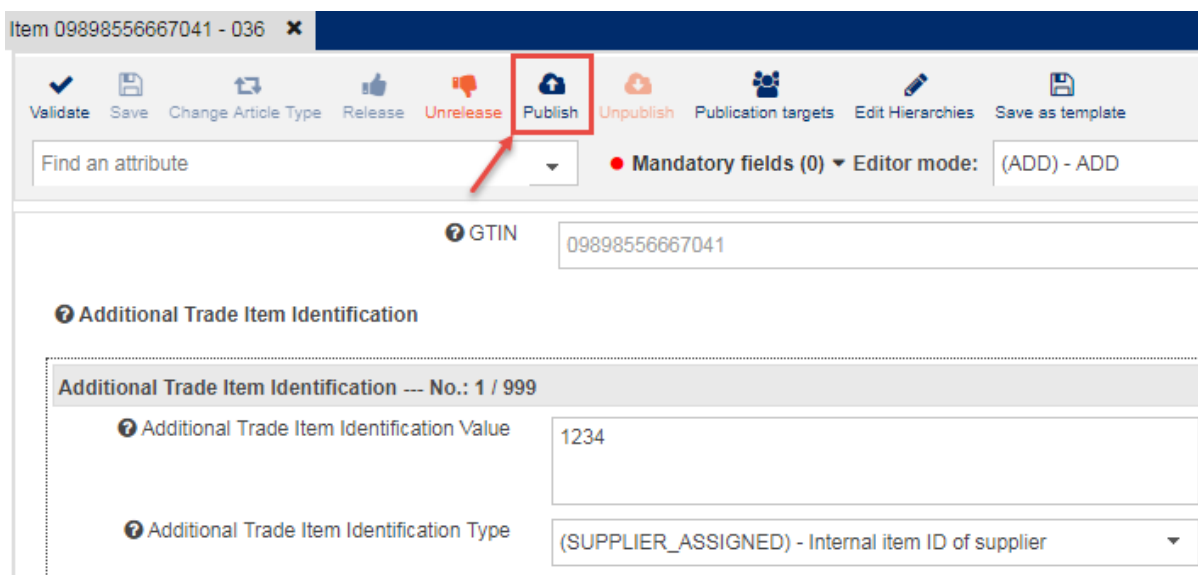
Item Details Editor with Publish Option on the top

This opens the publishing dialog Select publication targets. See 'Select Publication Targets' for detailed instructions.

3.4   Select Publication Targets

Clicking on *Publish* either in the hit list or item editor opens the publication dialog *Select Publication Targets*, where you either choose and/or add the recipient/s of the item. Publication targets can be added here for already published items:
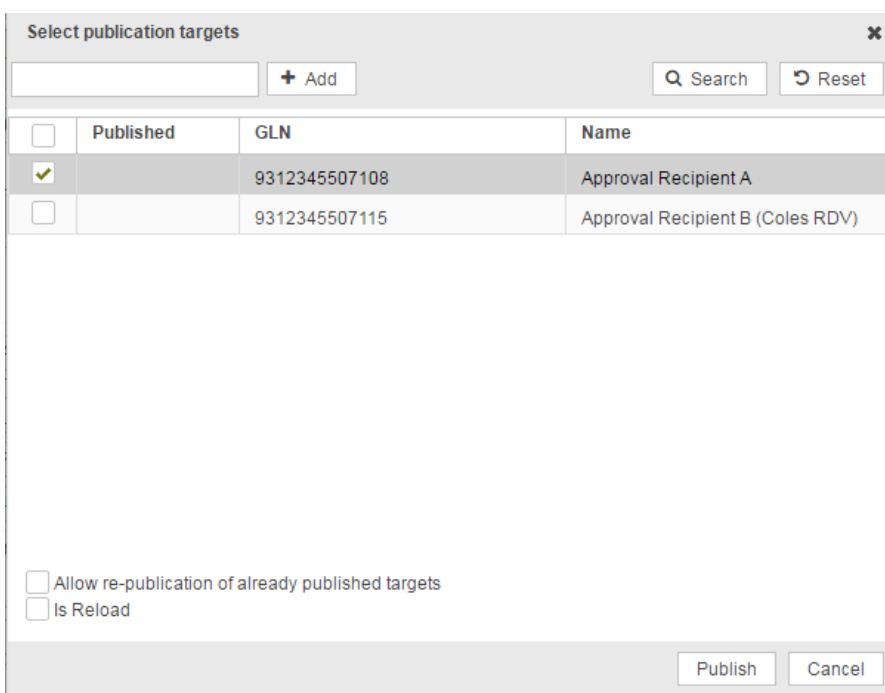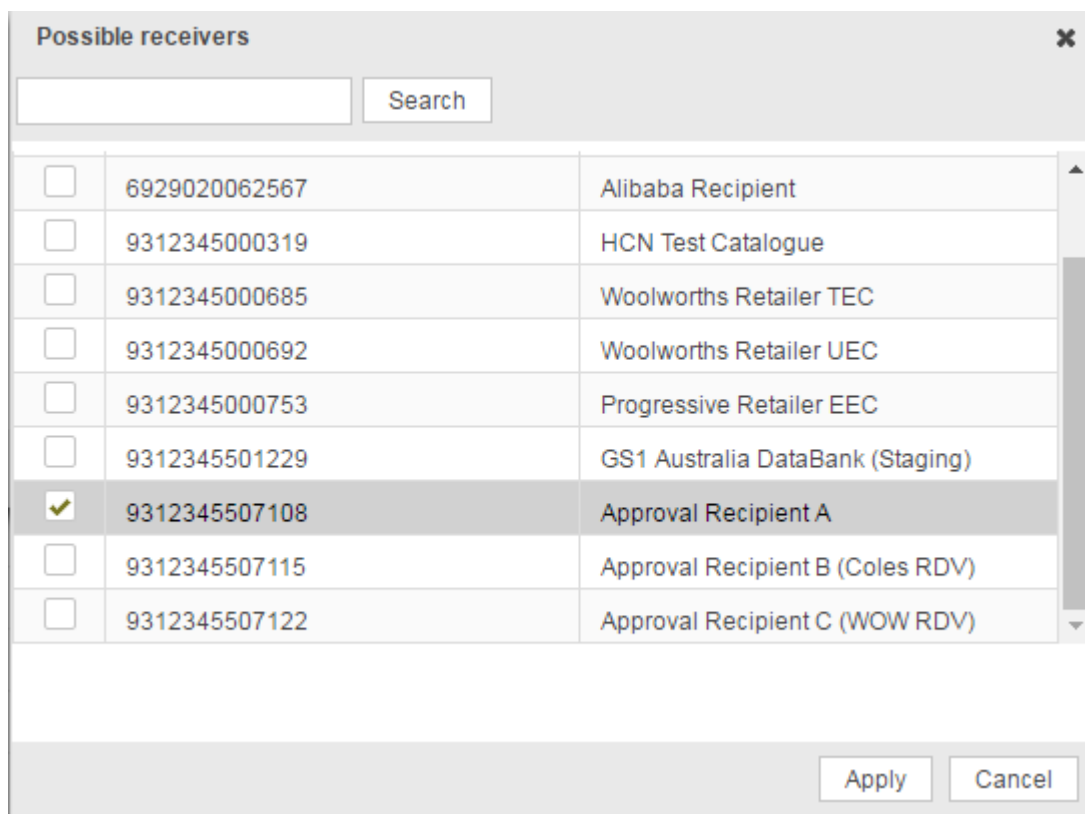

Selection list with retailers

Clicking ⟲ Reset here will remove the selected targets. Recipients not in the list yet can be added or searched for. To add recipients not yet known to the application, enter the GLN's in the entry field and click Add. You can only add one GLN at a time. The GLNs will then be added to the list below.

In case there is a list of possible data recipients pre-defined for your user account at item creation (in order to activate retailer-specific validations) (see 'Assign possible Recipients'), this list is offered in the *Select Publication Targets* dialog.

In order to select recipients from a long list of GLN use the Search button to open this list. We recommend restricting the list using search criterion entered in the search field on top. Select the recipients by flagging the check boxes in front.

Clicking *Apply* closes the search list and adds the selected publication targets - already flagged - to the list in the previous dialog.

Possible receivers		✖
	Search	
☐	6929020062567	Alibaba Recipient
☐	9312345000319	HCN Test Catalogue
☐	9312345000685	Woolworths Retailer TEC
☐	9312345000692	Woolworths Retailer UEC
☐	9312345000753	Progressive Retailer EEC
☐	9312345501229	GS1 Australia DataBank (Staging)
✔	9312345507108	Approval Recipient A
☐	9312345507115	Approval Recipient B (Coles RDV)
☐	9312345507122	Approval Recipient C (WOW RDV)
		Apply Cancel

Select the publication targets here by flagging the check boxes in front.

Back to the first page of the publication dialog you must now click the *Publish* button to initiate the publication process. If successful, the item receives the publication status *Item Published*.

3.5 Publishing an Item as Part of a Hierarchy

When a released item is part of a packaging hierarchy, it must not necessarily be published separately in order to be sent to the source data pool and from there to the retailers. In most cases it is not published itself, but sent out as a part of the hierarchy. The examples below clarify the status changes applied to items which are part of a hierarchy in which an item is published or unpublished.
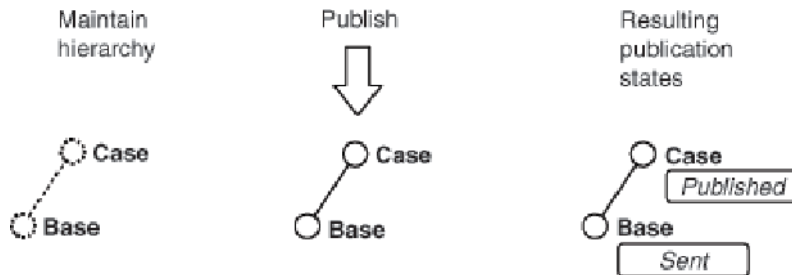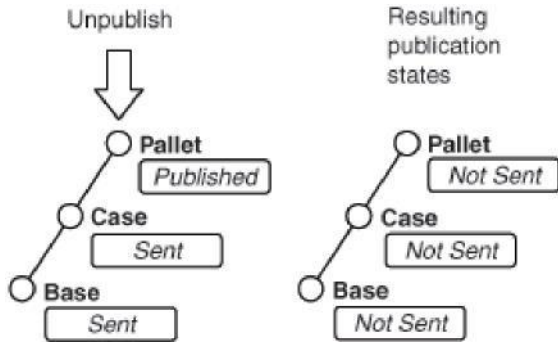

Editing and publishing of a simple hierarchy
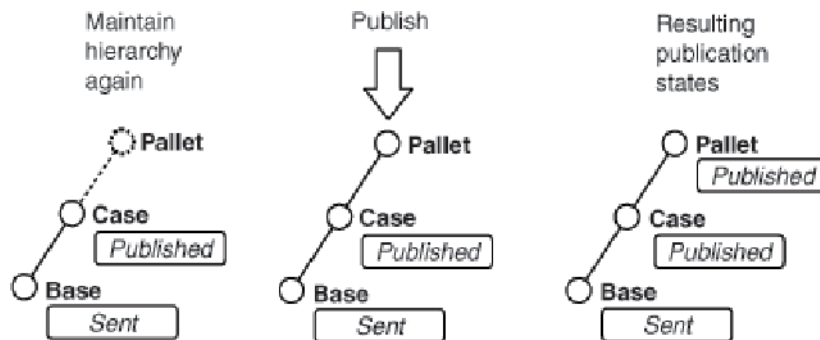
Enhancement of subsequent publishing of the simple hierarchy
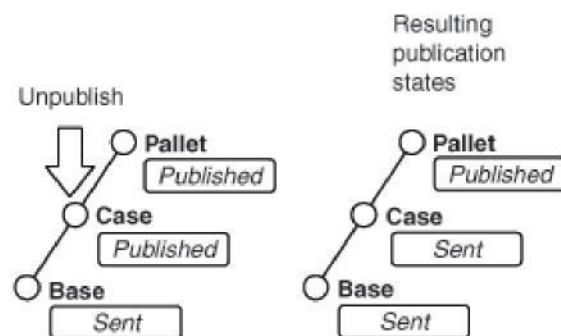
Revocation of publication of a part of the hierarchy

Revocation of publication of the entire hierarchy

3.6 Unpublish Items

If you want to revoke the publication of a published item (e.g. for a specific retailer - you can 'unpublish' it), you can unpublish it from the hit list or the item editor. If an item has been unpublished to all, it receives the overall item state 'Unpublished to all'.

Select the required items from the hit list and click the *Unpublish* option in the function bar:
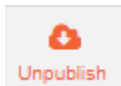
Unpublish option

From the Item Editor, the Publication Info widget will display the number and list of publications indicating the recipient GLN, recipient name, the publication date and the CIC status of every publication. In the item editor page, you can revoke the publication.

Click the Unpublish button from the function bar:
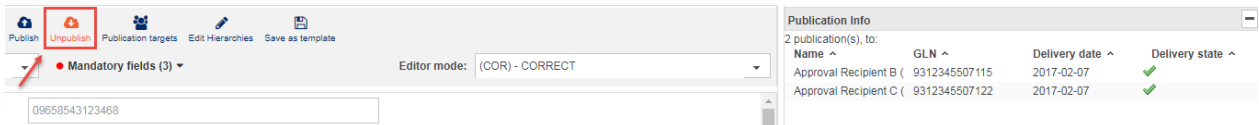
Publication Info Widget

Select all publication targets for which you wish to revoke the publication of the selected items. The list contains a list of the publication targets for all selected items. In the case of items that are selected but not published, this operation will simply be ignored.

Click *Unpublish* to complete the operation. Click *Cancel* to return to the hit list without revoking the publication.

✓	Published	GLN	Name
✓	1 of 1	9312345507115	Approval Recipient B (Coles RDV)
✓	1 of 1	9312345507122	Approval Recipient C (WOW RDV)

Select targets to unpublish from ✖

Unpublish   Cancel

Unpublication targets

The previously selected publication targets for the items are removed from the corresponding recipient lists.

4.0 TEMPLATE LIST

General Information

The Template List allows you to perform all functions related to template maintenance in one central area of the application. Templates can be very useful if your items have a lot of data in common. New items can be easily added using a template that contains predefined data that is already populated. The Template List has the same structure as the item hit list.
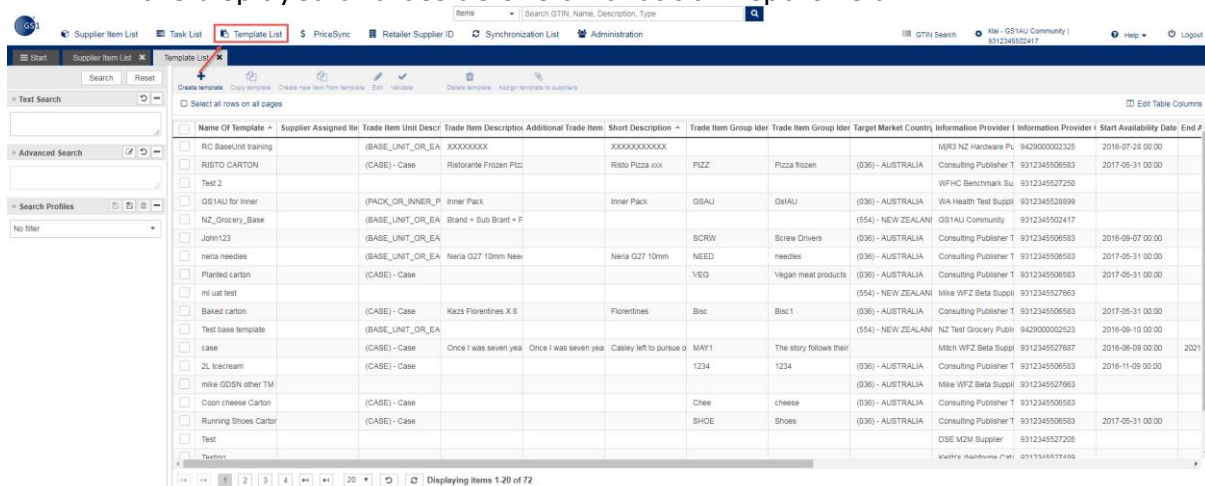
The following functions are available:

- Creating, copying and editing templates.
- A hit list displaying all templates with a template preview similar to the item hit list
- A validation report that validates the data filled in the template
- A Text Search and an Advanced Search

4.1 Structure of the Template List

The structure of the Template List is divided into 3 areas:

- The hit list, where all saved templates are displayed
- A search section, where the templates can be retrieved via a Text and an Advanced search with the option of saving search profiles
- A preview of the data populated in the template, where validation errors are displayed and beside this a validation report field
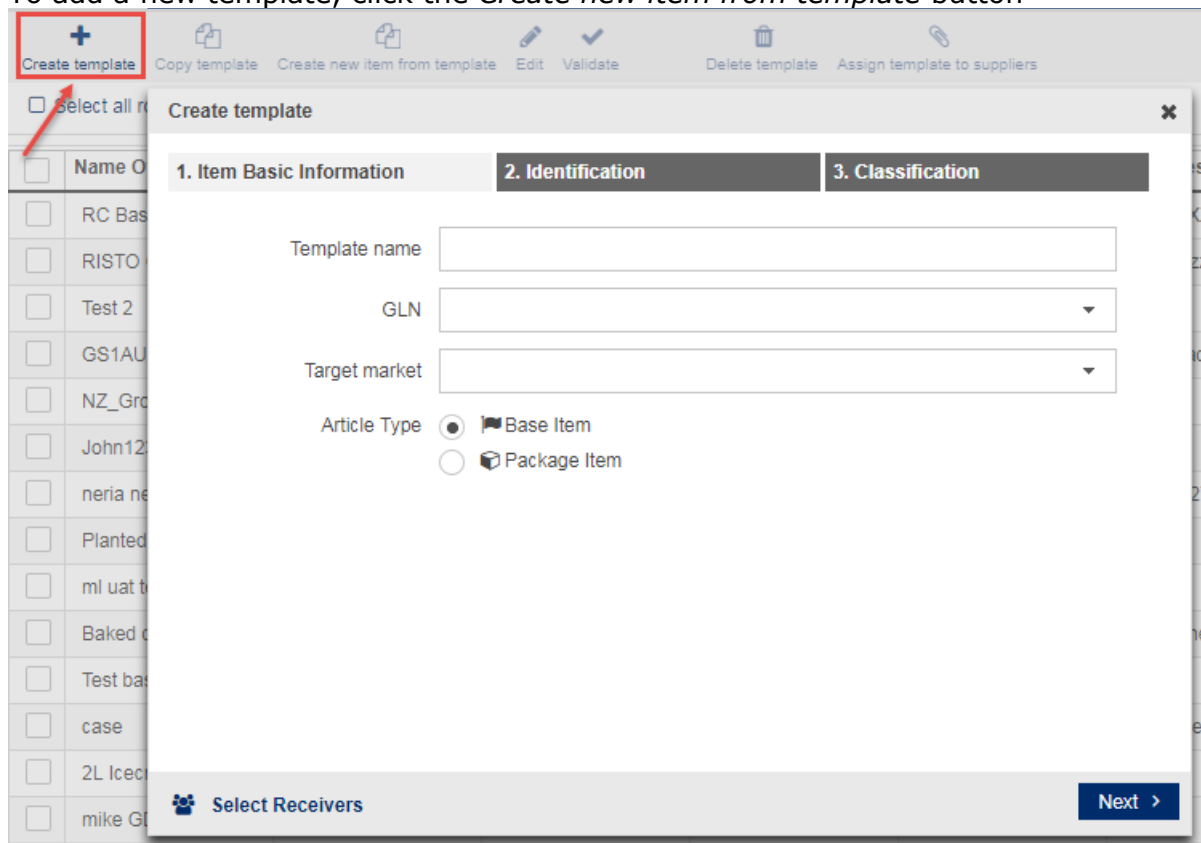

Template List

- Templates which are assigned to you by the community owner are marked with a lock symbol. Those templates can be used for new items, however the template itself cannot be altered.

	...	Supplier Assigned Item Id	Trade Item Hierarchy Level
☐	🔒	OTRS 0299796 KG	Each (Piece) / Base Unit (BASE_UN...
☐	🔒	001	Case (CASE)
☐	🔒	001	Each (Piece) / Base Unit (BASE_UN...
☐	🔒		
☐		123	Case (CASE)
☐		123	Each (Piece) / Base Unit (BASE_UN...

Templates locked

4.2   Create Template

To add a new template, click the *Create new item from template* button

Create Template dialog

- Indicate the template name
- The *Article Type* allows you to specify the nature of the item that the template will be used for. Similar to the creation of an item, indicate whether this is a template for packaging or for base items
- By clicking on *Create* the editor will open. When the template is saved for the first time, the data entered will be validated. Any further validation must be initiated manually.

- The template name must be populated in order to be able to save the template. All other missing data does not prevent the template from being saved. Stored templates are available for selection from the drop down menu; the user can correct the item data at a later stage.

4.3   Copy a Template

To copy a template, select a template in the hit list and click the *Copy Template* button in the function bar. Please note, that when highlighting more than one template, the *Copy* button is inactive.
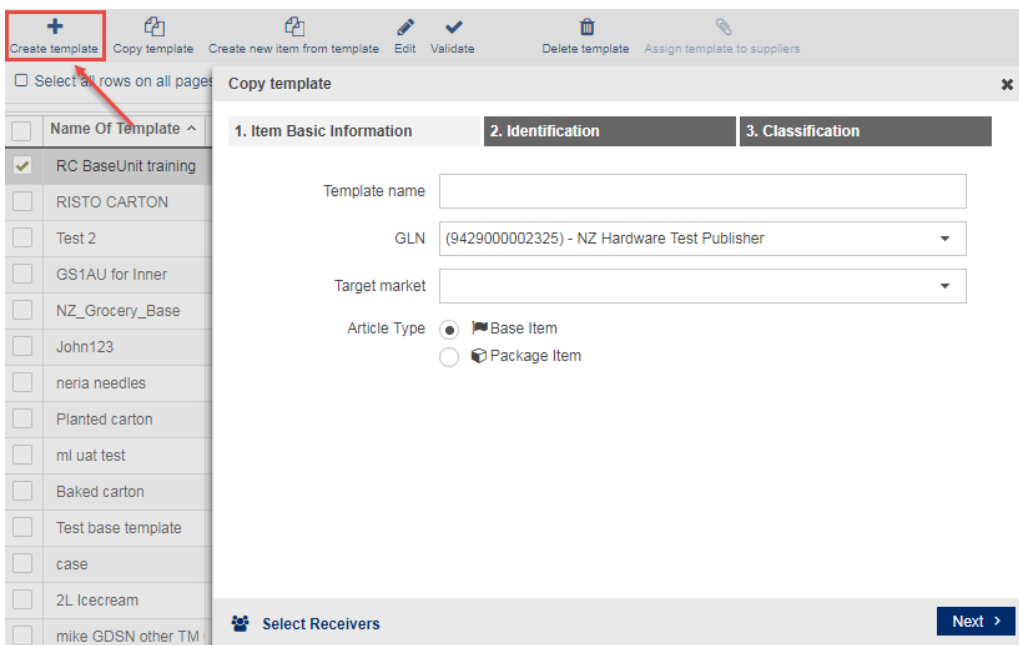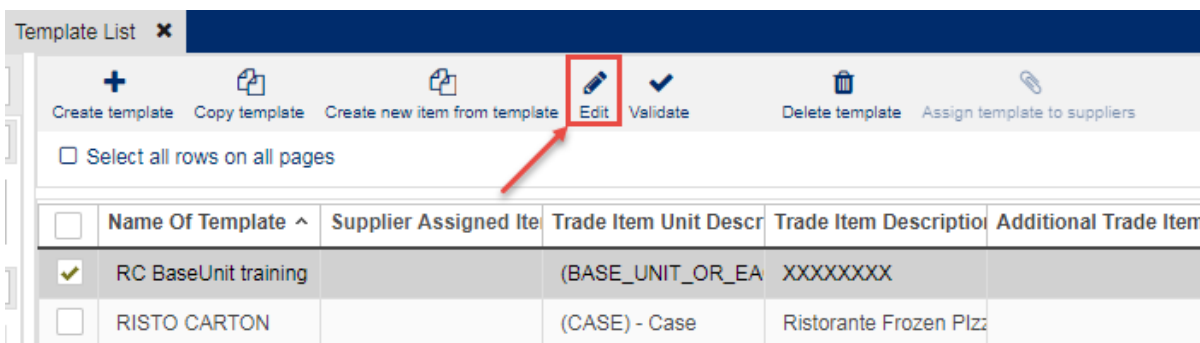

Copy Template dialog

The filled data in the copied template can now be modified in the Editor before saving the template.

4.4   Edit Template

Click the Edit option in the function bar to edit one or more templates

Edit Template

- Clicking the button directly leads to the Editor with the template.
- Edit the template and click save. The template will be validated automatically and an error report will be generated.

4.5   Save an existing item as a Template

There are two ways of saving an existing item as a Template.

If the item is already opened in the item editor, simply click the Save as template button. The template creation dialogues now opens, enter a template name and chose the article type.
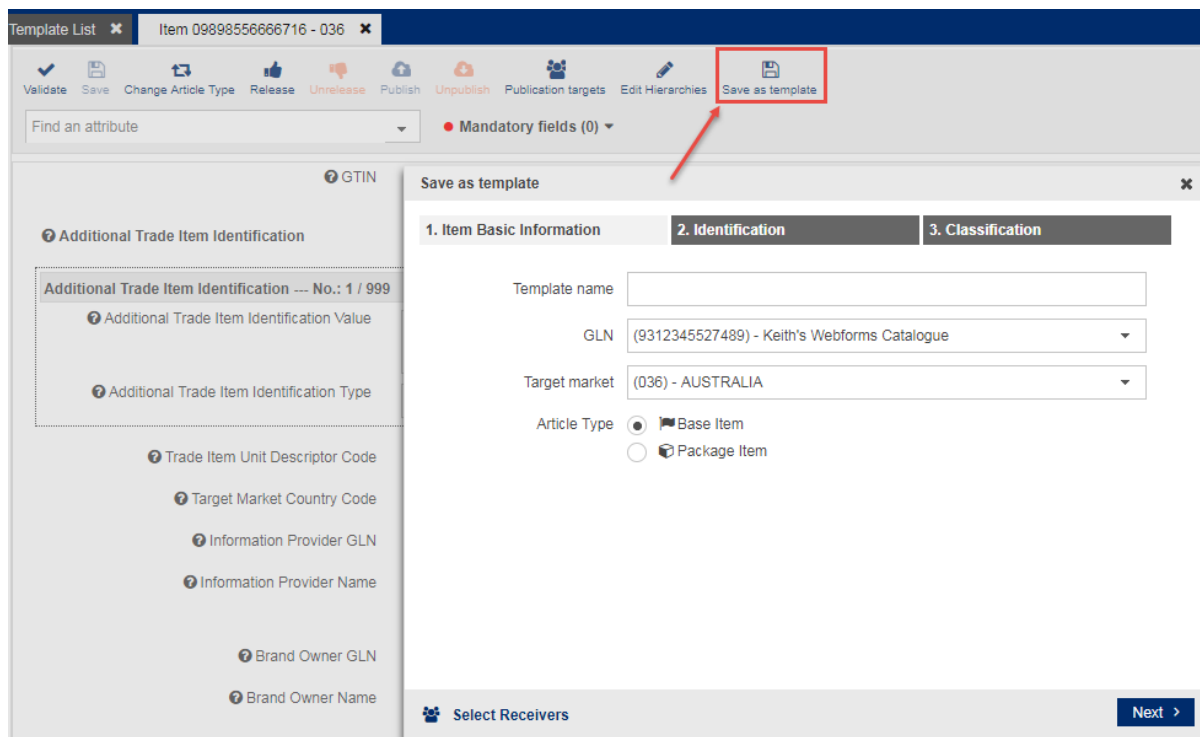
Save Template Dialog
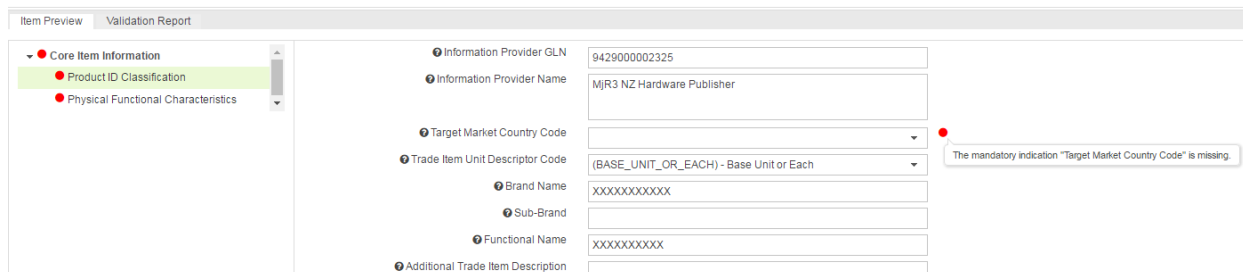
- To save an item as template from the hit list flag the item and click the Save as template button in the function bar. Please note that only a single item can be saved as template at a time.
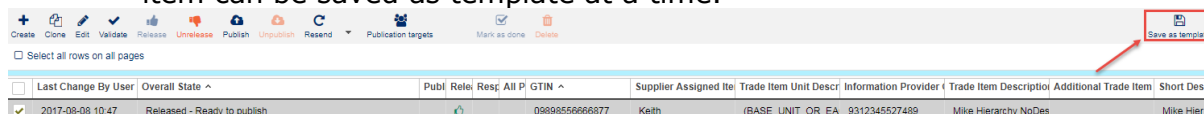
Save Template from hit list

4.6   Template Preview and Validation Report

The preview is meant to provide a quick overview and displays only a limited set of attributes. It is provided in a read-only mode. The data cannot be modified but validation errors are displayed.
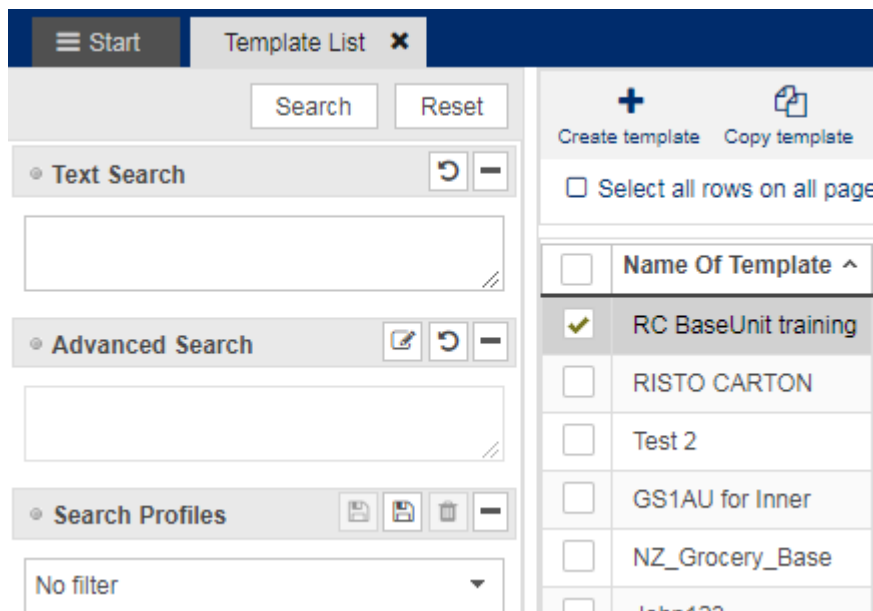
Preview with validation error in read-only mode

The Validation Report is displayed in a separate tab. The validation must be activated manually through the Validate button in the function bar. You can validate more than one template; the validation reports for all templates will be displayed together. The validation report is not saved. When clicking another item or another tab the report will disappear.

4.7   Searching for and finding Templates

The search section of the 'Template List' is located in the widget on the left-hand side. A Text Search and an Advanced Search is provided here to retrieve the templates. Searching and navigating with both search options is done the same way as the search works for items in the Supplier Item List. For details see section 'Find Items with the Text Search function' and 'Find Items with the Advanced Search Function'.

A Search Profile can be saved. The Search profile works the same way as in the item list.
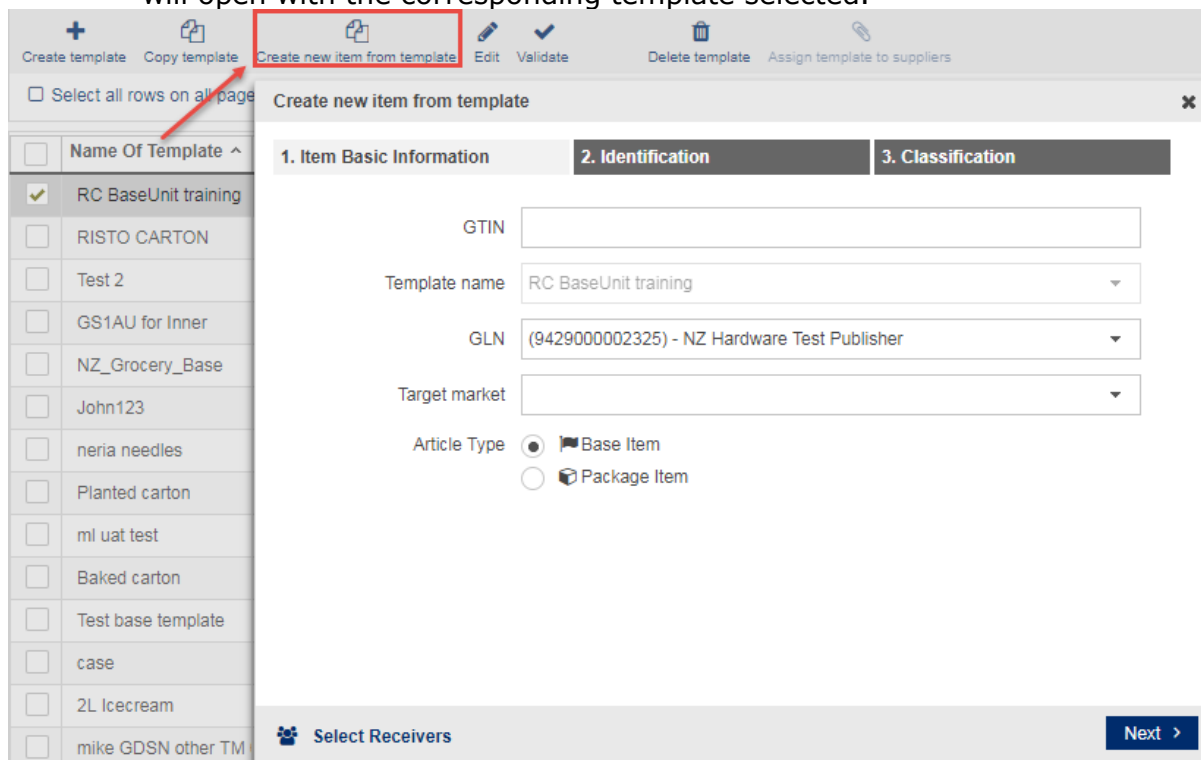
Search option widget

4.8   Create new item from Template

The template list function bar provides a functionality to create an item directly from a template.

- • Click the 'Create item from template' button and the 'Create Item' dialog will open with the corresponding template selected.
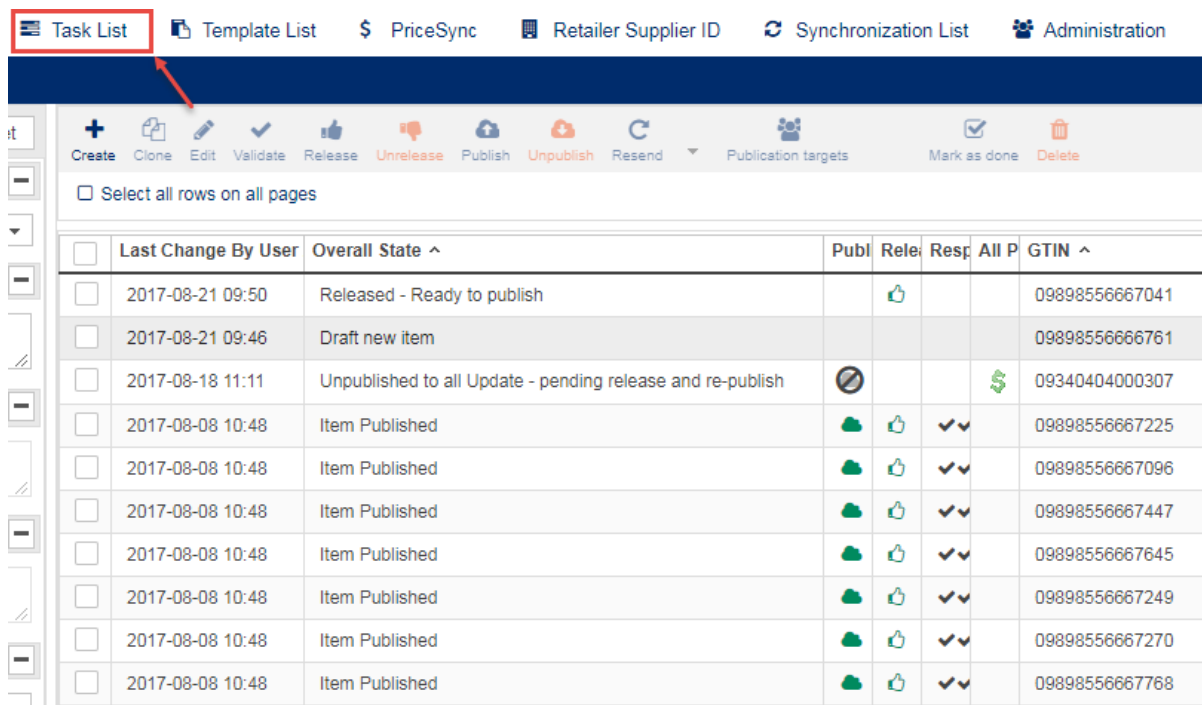

Create item from template

You can also create items from templates if you click on the Create button in the item list. Choose the template from the drop-down list. Templates assigned by the community owner are bold.

5.0 TASK LIST

The Task List provides a separate area for managing incoming tasks via Catalogue Item Confirmations. Items with a To Do state as a result of CICs with state REVIEW or GDSN Exceptions are listed here.

The handling of the Task List as well as the available functions is consistent with the Supplier Item List. The search section on the left-hand side and the function bar are identical. Please refer to the respective sections for further information.

Task List

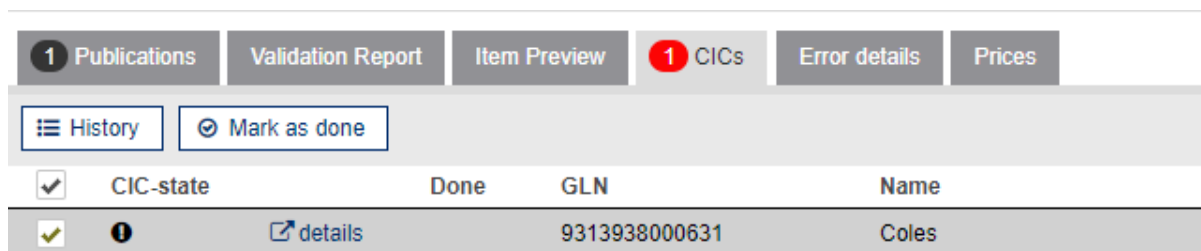## 5.1 Working on items with *To Do* Status

There are two different reasons why items appear in the Task List:

- A retailer's request for the review of a certain item. The feedback from the retailer will be handled through a CIC Review message which references an item and contains review details.
- A GDSN Exception sent by the source data pool is an immediate feedback if the publication failed.

The CIC Review is indicated with a 🔴 sign. For more information on the *Catalogue Item Confirmation* in general and its status please refer to section 'CIC State'.

The GDSN Exception, displayed with a ❶ sign, is displayed in the *CIC Summary* tab as well.

Please note that only items with either the To Do state CIC review or GDSN Exception are displayed here. Further information on the nature of the data that needs to be revised can be viewed in the *CICs* tab beneath the hit list.
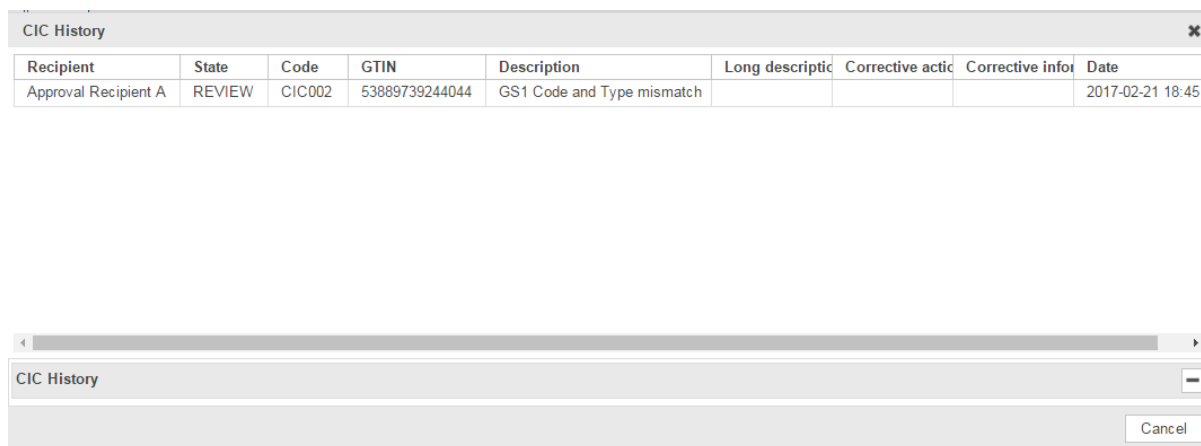

CICs Tab

When clicking on *"details"* a window opens, specifying the data that is not accepted by the recipient. Please note that this information is provided by the data recipient.
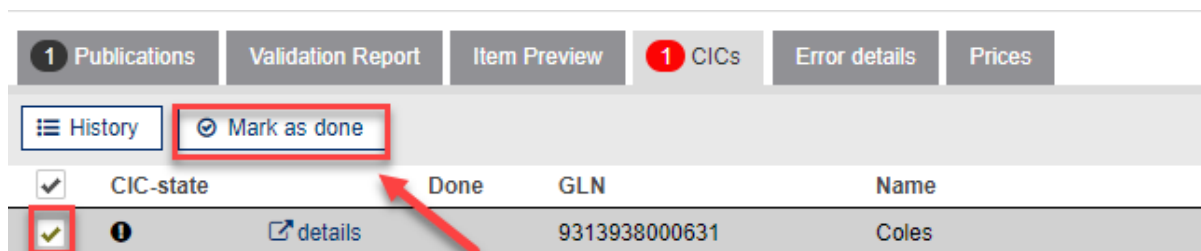

CIC History with corrective information from the recipient.

Select the item from the hit list and edit the affected data. Please see section 'Edit Items' for further details.

5.2 Close a *To Do* from Task List

The user can tick off the 'CIC REVIEW' entries and mark them as '*Done'*. This action does not depend on the status of the item, the user can mark the Review as done whether he has edited the item or not. This option is provided in the *CIC Summary* tab.

Select the CIC received from Recipient and click Mark as Done

The status 'GDSN exception received' is automatically reset as soon as messages have been sent again. As soon as either the CIC-status is marked as done or the item has been released again after the data was modified, it disappears from the task.