



# PECOS Catalogue Manager

Version 1.0



## User Guide

December 2011

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Document Owner: Product Management  
Creation Date: 28<sup>th</sup> July 2011  
Last Updated: 1<sup>st</sup> December 2011

Document Version: 1.3  
Product Version: 1.0.15

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# 1 Introduction

## 1.1 About Elcom

Elcom Systems is a trading company of Elcom International Inc., a leading global provider of remotely-hosted automated procurement and electronic marketplace systems with over fifteen years experience in electronic commerce. Elcom offers the most cost-effective remotely-hosted eProcurement solution available today and with clients in the US and UK, provides purchasing solutions for the world's largest public sector eProcurement service. For more information please contact <http://www.elcom.com>.

## 1.2 About PECOS Catalogue Manager

Elcom's PECOS Catalogue Management (PCM) sub-system is provided to compliment the PECOS P2P eProcurement process for the provision and management of catalogue data. It is a separately licensed application, designed to operate as a fully integrated catalogue content management solution for PECOS, eliminating all of the problems experienced when integrating to external, third party solutions.

The current release of the PCM solution enables any PECOS procurement organisation to search for existing catalogues and upload catalogue content for full validation of fields, formats and extended content. A detailed error report is generated for all validation failures and is downloadable in Excel format. Users are also able to use the PCM as a content repository and run reports to compare the current catalogue to either a contract or previous version.

## 1.3 About this Document

This document is provided as a user guide for all buying organisation administrators accessing the PECOS Catalogue Manager through the PECOS administration portal and describes the functionality found in the current release.

This document does not cover the PECOS setup and administration tasks that are required to provide integrated access to the PCM in detail. Users should refer to the appropriate PECOS manual.

## 1.4 Platform Support

Note that the recommended platform will greatly enhance performance.

### 1.4.1 Hardware Requirements

- **Minimum:** Pentium PC (100 MHz or higher) with 32 MB RAM.
- **Recommended:** Pentium III with 128 MB RAM.
- SVGA monitor capable of 1024 X 768 resolution.
- Modem or other device supporting 56 kbps or faster connection to the internet (Ethernet network interface card recommended).
- It is also expected that the hardware configuration recommended by each user's chosen browser version is used.

### 1.4.2 Software Requirements

- **Operating Platform:**  
MS Windows 98, NT, 2000, ME, or XP with TCP/IP configured. (Windows 95 is not recommended).
- **PC Windows Browser:**  
Elcom's policy is to support the most current version as well as the previous version of internet browsers. Microsoft Internet Explorer is required for PECOS administration.
  - **Minimum but not supported:** Microsoft Internet Explorer version 6.x
  - **Recommended and Supported:** Microsoft Internet Explorer versions 8.x or 9.xNote that when Internet Explorer 8.0 is used the latest JRE/JVM version must be installed.
- **Display Size:**  
Minimum and recommended: 1024 x 768 pixels / small fonts. 256 or greater colours and 32 bit colour quality is recommended.
- **Java:**  
MS JVM or Sun JVM is required and Java Applets must be enabled. The latest version of JRE/JVM is strongly recommended and available for free download from [www.java.com](http://www.java.com).

## 2 System Setup and Access

The PECOS Catalogue Management (PCM) system is fully integrated with PECOS and access is provided through the administration portal.

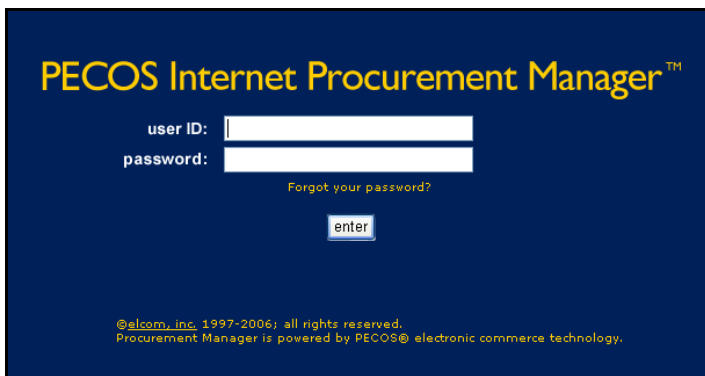
PECOS must be configured to allow access to the PCM and users must be appropriately enabled with administration privileges and be conversant with system administration tasks (please refer to the current PECOS Administration Guide).

The following section describes how to access PECOS. For more detail or a description of additional user tasks (e.g. managing passwords) please refer to one of the PECOS User or Administration Manuals.

### 2.1 Logging In

PECOS is a remotely hosted application which is accessed over the internet using a web browser.

- 1 To access PECOS, open a web browser and enter your system's URL in the address bar and press enter on your keyboard. **The URL will usually be in the format: "yourorganisation".pecosipm.com**
- 2 The PECOS **login page** will appear:



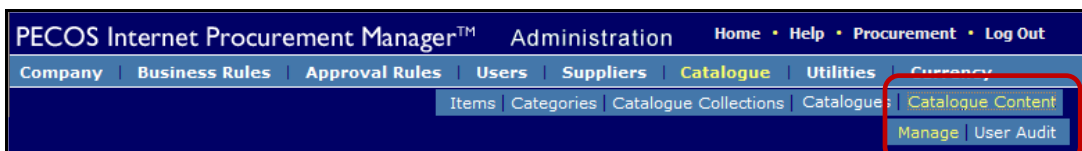
Login page

- 3 Type in your **User ID** and **Password** (case-sensitive fields) and click 'enter'.
- 4 The PECOS **Home Page** appears for the Procurement Module.
- 5 To access the PCM you must navigate to the **Administration Module**. Click on the 'Admin' link on the top menu bar. Only users who are defined as administrators will be able to see this Administration menu option.



Admin menu option

- 6 In the Administration area, navigate to the PCM system by following the main menu options: **Catalogue > Catalogue Content**.



PCM menu options

#### 2.1.1 JavaScript

If JVM is not installed or Java Applets are not enabled on your web browser (see 'Software Requirements' above) a warning message will be displayed on the login page. This issue will not prevent you logging in but it will adversely affect how some pages are displayed and how some features operate. It is recommended that the appropriate changes be made to your web browser settings.

## 2.2 Logging Out

For security reasons, you must log out whenever you have finished catalogue management tasks. **Never leave your computer unattended whilst being logged into the PECOS administration module or PCM system.**

To logout of PECOS click **Log Out** located on the top menu bar. The initial **Login Page** reappears when you have logged out successfully and you can then close down your browser window.

### 2.2.1 Time Outs

PECOS may also be configured to automatically log you out after a period of inactivity. This is a security feature that ensures that the application is not inadvertently left open whilst you are away from your computer. If you are timed out, PECOS does not lock your user id but any unsaved changes will be lost.

## 2.3 Data Setup

The PECOS Catalogue Manager has been developed to be fully integrated with Elcom's market leading P2P application, PECOS, which provides the management and authentication of catalogues, organisations and users. This section provides a brief overview of setup: more detailed information can be found in the PECOS Administration Manual.

### 2.3.1 User Setup

A user who is to manage catalogues in the PCM will do so through the PECOS administration subsystem and must therefore have the 'Administrator' role assigned. The administration task: 'Catalogue Content Management' must then be assigned to the user in the administrator security screen. No additional user setup is required since the PCM is fully integrated.

### 2.3.2 Supplier Setup

The supplier must be setup in PECOS. All suppliers configured as the Types: 'Catalogue Only' and 'Catalogue and Non-Catalogue' will be available for use in the PECOS Catalogue Manager. There is no additional supplier configuration required for the PCM since it is fully integrated.

### 2.3.3 Catalogue Setup

A Catalogue Key must be created in PECOS and assigned to a supplier in the usual way in order for the catalogue to be available in the PCM subsystem. A PCM administrator will be given access to catalogues based on their administrative organisation privilege (access is not linked to catalogue collection or Business Rule Group).

It is not necessary for a catalogue to be pre-loaded directly to PECOS or an index group to pre-exist, in order for a catalogue to be uploaded in the PCM.



### 3 Catalogue Search

The first step in managing a catalogue is to locate it using the catalogue search facility, found in the **Find Catalogue** screen which opens after selecting the 'Catalogue Content > Manage' menu option. Users are able to manage one catalogue at a time and must first make a selection before entering the content management screens. The PCM will search all catalogues in the database of the PECOS site to which it is integrated.

#### 3.1 Search

The **Find Catalogue** screen is the landing page after selecting the 'Manage' main menu option.

*Catalogue search options*

Enter text into one of the following search fields:

- **Supplier (starts with)** – Enter partial text to search for the name of a supplier. All catalogues found for all suppliers *that begin with* the entered text will be returned. The search is not case sensitive.

The supplier search is an intuitive field that will prompt you with matching results as criteria is entered. When displayed, select the supplier name to automatically populate the search field.

*Supplier search*

- **Catalogue Key (starts with)** – Enter partial text to search for a catalogue key. All catalogues that have a catalogue key *that begin with* the entered text will be returned. The search is not case sensitive.


The catalogue search is an intuitive field that will prompt you with matching results as criteria is entered. When displayed, select the catalogue key to automatically populate the search field.

*Catalogue search*

- **Catalogue Description (contains)** – Enter a partial value for the catalogue description. All catalogues *that contain* the entered text string within their description will be returned. The search is not case sensitive.

Text can be entered into more than one search field to create a search string (joined by 'or') in order to locate catalogues that separately match all the entered criteria.

To reset the search criteria click the 'Clear' button. This will not reset the search results: to reset the search results undertake a new search.

 To invoke a search for all catalogues that match your search criteria, click the 'Search' button. A new search will replace any existing search results.




### 3.2 Search Results

Catalogue details that match the search criteria are displayed in alphabetical order by supplier in the Catalogues table.

**Catalogue Content - Find Catalogue**

Supplier (starts with)  Catalogue Key (starts with)  Catalogue Description (contains)

**Catalogues**

Supplier ↕	Key ↕	Description ↕	Organisation ↕	Detail
Maidenhead Stationers Ltd	MW_MAIDSTAT	Maidenhead Stationers	Maidenhead College	
Maidenhead Stationers Ltd	MW_MAIDSTATCORE	Maidenhead Stationers Core List	Maidenhead College	
Watsons Waffles & Sons Ltd	MW_Wats Waffles	Wats Waffle Catalogue	Maidenhead College	

*Catalogue search results*

Search results can be sorted by clicking on a column header. Click once to sort in descending order and twice to sort in ascending order.

### 3.3 Manage Catalogue

Once the catalogue to be managed has been located, the next step is to navigate to the 'Manage Versions' options.



To open a catalogue and proceed to catalogue content processing tasks, click on the spyglass icon in the detail column of the search results table.

The **Manage Versions** screen will open where the following tasks can be undertaken:

- View catalogue history
- Run comparison reports
- Upload files to create:
  - a new catalogue version
  - validation reports for download
- Download a new catalogue version for publication
- View catalogue content management audit trail entries



## 4 Catalogue History

The **History** tab contains detailed version history for the selected catalogue and allows the user to run comparison reports for two selected versions.

### 4.1 Header

The top of the **Manage Versions** screen displays summary catalogue information (supplier, catalogue key and description) and status detail for the catalogue selected.

 Click the **Back** button to return to the **Find Catalogue** screen to undertake a new search.

**Version Status** will display the current status of any new catalogue version under management:


- **A new version has not been initiated** – a file has not yet been uploaded to initiate a new catalogue version.
- **Validated** – a new version has been initiated: a valid catalogue file has been uploaded and is available to be published as the new current catalogue.
- **Validation Failed** – a new version has been initiated: an invalid catalogue file has been initiated and cannot be published (the file must be reloaded or cancelled).

### 4.2 View History

The history table lists the current and all previously published (i.e. superseded) catalogue versions.

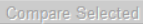
**Catalogue Content - Manage Versions**

Supplier: Maidenhead Stationers Ltd      Catalogue Key: MW\_MAIDSTAT      Description: Maidenhead Stationers

 Version Status: Validated

History    **New Version**    Publish    Audit Trail

Hold Ctrl key and click to select any two versions to compare.



Version No.	Status	Publication Date	Version Description	More Information
4	Current	06-Sep-2011 09:37 BST	Winter Catalogue	<a href="#">Comments</a> <a href="#">Export catalogue file</a> 8 items.
3	Superseded	17-May-2011 13:54 BST	Summer Catalogue	<a href="#">Comments</a> <a href="#">Export catalogue file</a> 8 items.
2	Superseded	10-Feb-2011 12:25 BST	Spring Catalogue	<a href="#">Comments</a> <a href="#">Export catalogue file</a> 8 items.
1	Superseded	10-Feb-2011 12:02 BST	Spring Catalogue	<a href="#">Comments</a> <a href="#">Export catalogue file</a> 8 items. Reference Version

*Catalogue version history*

The History table contains the following columns:

**Version No.** – the catalogue version number, assigned automatically when a new catalogue is published. When a new version has been initiated, a version number will not be assigned until publication and the catalogue will not appear in the History Table.

**Status** – the catalogue status assigned and updated automatically when a catalogue is published. Statuses are described in detail in the section below.

**Publication Date** – the date and time the version was published.

**Version Description** – the catalogue version description, entered when the catalogue file was initially uploaded.

**More Information** – additional information relating to the version and may include:

- Publication comments - click the [Comments](#) link to view.
- [Export catalogue file](#) link – click to download the catalogue file.
- Item count – indication of the number of items contained in the catalogue file.
- Reference Version – If the catalogue was published as a reference version a note will display.

### 4.3 Statuses

A catalogue version will be assigned one of the following statuses.

- **Current:** The last published and therefore current version of the catalogue. There can only be one current catalogue.
- **Superseded:** A previously published catalogue version (i.e. a superseded current catalogue). There can be many superseded catalogues.
- **Validated:** A catalogue file has been uploaded and a new version is in progress: the file is valid (i.e. does not contain any errors) and is available for publication. A validated catalogue can still be replaced by uploading a new file or it can be cancelled.

Details of the valid initiated new version and a link to download the file can be found in the Audit Trail.

- **Validation Failed:** A catalogue file has been uploaded and a new version is in progress: the file is invalid (i.e. contains errors) and cannot therefore be published. An invalid catalogue must be either replaced by uploading a new file or it can be cancelled.

Details of the invalid initiated new version and a link to download an error report can be found in the Audit Trail.

### 4.4 Compare Versions

A comparison report for content and price changes can be run in the history tab between any published (i.e. current or superseded) catalogue versions.

Note that valid new versions that have been initiated can be compared to the current or reference version (when available) in the New Version tab.

To run a comparison report between two catalogue versions:

- 1 Select any **two** versions by clicking and highlighting the rows in the history table:
  - a) Click the row of the first version to be included in the comparison (click anywhere in the row)
  - b) Hold down the 'Ctrl' (Control) key
  - c) Click in the row of the second version to be included in the comparison (click anywhere in the row)
- 2 With two catalogue versions selected the 'Compare Selected' button will become available.

Note. If only one row or more than two rows is selected, the button will remain greyed out and a comparison report cannot be run.

**Catalogue Content - Manage Versions**

Supplier: Maidenhead Stationers Ltd      Catalogue Key: MW\_MAIDSTAT      Description: Maidenhead Stationers

   Version Status: A new version has not been initiated

History    **New Version**    Publish    Audit Trail

Hold Ctrl key and click to select any two versions to compare.

Version No.	Status	Publication Date	Version Description	More Information
5	Current	16-Sep-2011	New Contract Prices	
4	Superseded	06-Sep-2011	Winter Catalogue	<a href="#">Comments</a>
3	Superseded	17-May-2011	Summer Catalogue	
2	Superseded	10-Feb-2011	Spring Catalogue	<a href="#">Comments</a>
1	Superseded	10-Feb-2011	Spring Catalogue	<a href="#">Comments</a> Reference Version

*Compare selected versions*

- 3 Click the 'Compare Selected' button.
- 4 The comparison reports will generate.
- 5 Two reports will display for download:

- Price Changes – lists all items with changed price information
- Content Changes – lists all items that have any other changed detail (i.e. non price related)

**Catalogue Content - Manage Versions**

Supplier: Maidenhead Stationers Ltd      Catalogue Key: MW\_MAIDSTAT      Description: Maidenhead Stationers

[Back](#)    Version Status: A new version has not been initiated

History    **New Version**    Publish    Audit Trail

Hold Ctrl key and click to select any two versions to compare.

[Compare Selected](#)    [Price Changes](#)    [Content Changes](#)

Version No.	Status	Publication Date	Version Description	More Information
5	Current	16-Sep-2011	New Contract Prices	
4	Superseded	06-Sep-2011	Winter Catalogue	<a href="#">Comments</a>
3	Superseded	17-May-2011	Summer Catalogue	
2	Superseded	10-Feb-2011	Spring Catalogue	<a href="#">Comments</a>
1	Superseded	10-Feb-2011	Spring Catalogue	<a href="#">Comments</a> Reference Version

Comparison reports completed

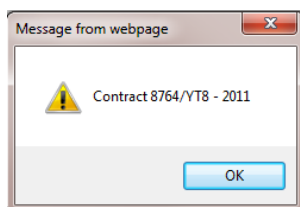
6 Click on one of the report links to open or download and save as an Excel spreadsheet.

Refer to section 7 below for additional information and a detailed description of the content of the comparison reports.

#### 4.5 More Information

The More Information column contains additional information about the published catalogue file.

- A [Comments](#) link will display to open a pop up window containing the comments entered when the catalogue was published.



After reading the comments, click 'OK' to close the pop up window.

- An [Export catalogue file](#) link will display to download a copy of the published catalogue file. A 'File Download' window will open where catalogue export file can be opened or saved.
- If the catalogue was published as a reference version file the text 'Reference Version' will appear.
- A numeric indicator (e.g. '8 items') will display the number of individual line items contained in the published catalogue.

#### 4.6 Previous Versions

The number of versions retained by the PECOS Catalogue Manager is configurable by your site administrator. The default is 4, including the current and superseded versions (including any reference version) but may be set higher. Version history will be automatically archived.

## 5 New Version

The **New Version** tab is where catalogue files are uploaded and automatically validated.

The user will remain in the context of a new version after the initial upload and until the version is either cancelled or published. The catalogue file must pass validation before it can be published but can be reloaded as many times as is necessary.

### 5.1 Header

The top of the **Manage Versions** screen displays summary catalogue information (supplier, catalogue key and description) and status detail for the catalogue selected.

 Click the **Back** button to return to the **Find Catalogue** screen to undertake a new search.

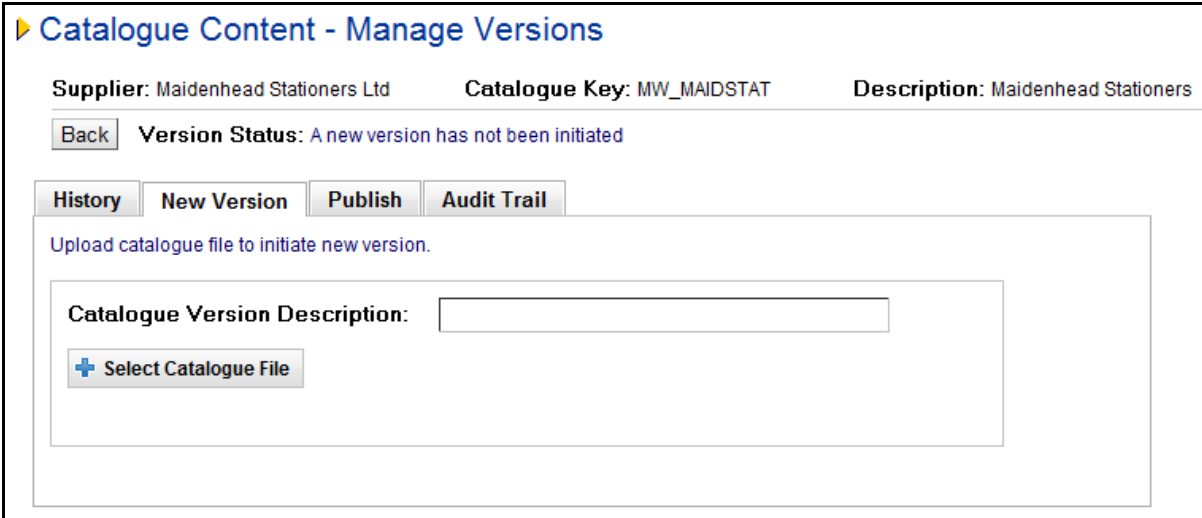
**Version Status** will display the current status of any new catalogue version under management:

- **A new version has not been initiated** – a file has not yet been uploaded to initiate a new catalogue version.
- **Validated** – a new version has been initiated: a valid catalogue file has been uploaded and is available to be published as the new current catalogue.
- **Validation Failed** – a new version has been initiated: an invalid catalogue file has been initiated and cannot be published (the file must be reloaded or cancelled).

### 5.2 Initial Upload

If a new catalogue version has not been initiated the Version Status in the header will display: '**A new version has not been initiated**'.

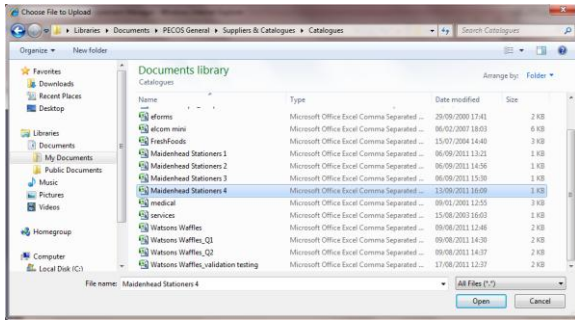
To initiate a new version of the catalogue, click on the New Version tab. The text: 'Upload catalogue file to initiate new version' will display at the top of the screen.



*New version tab - awaiting new version*

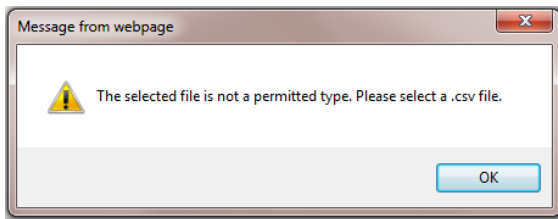
To initiate a new catalogue version follow these steps:

1. Enter a **description** for the new version that is to be uploaded in the 'Catalogue Version Description:' field. This should be provided for tracking and audit purposes (e.g. 'Summer Edition' or 'June Price Updates') and is mandatory.
2. Click on the **Select Catalogue File** button. In the file chooser pop up window, search and open the catalogue file to be uploaded.



Select a file for upload

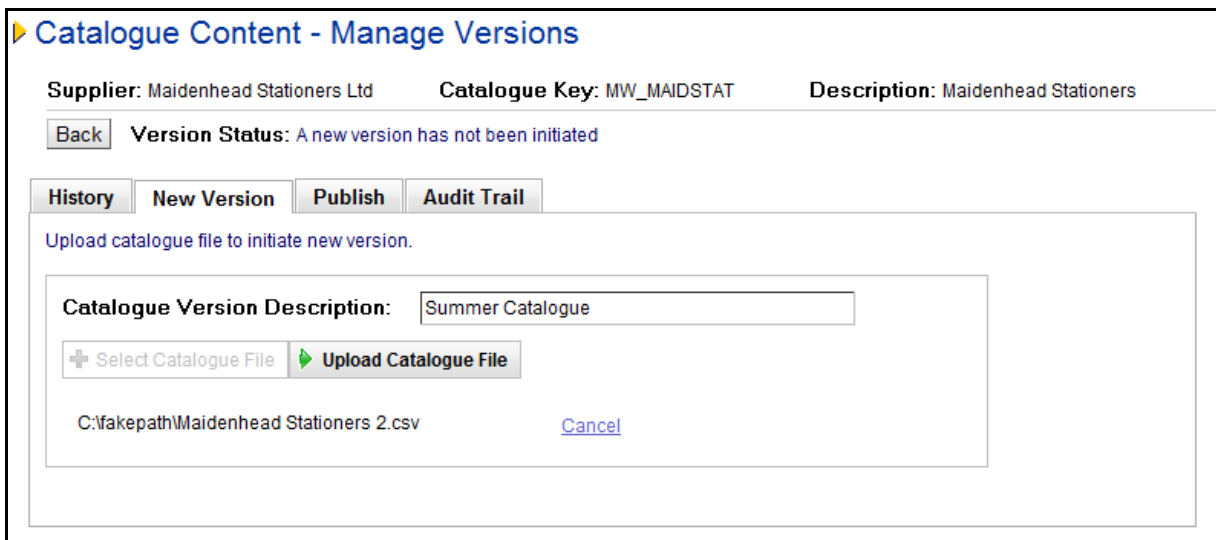
The selected file must be a .csv (comma separated values) file. If a differently formatted file is selected the following error message will display:



Invalid file type error

Click 'OK' and re-select a file that is correctly formatted (i.e. a csv).

- After choosing the file for upload an **Upload Catalogue File** button will become available and the name of the selected file will display.

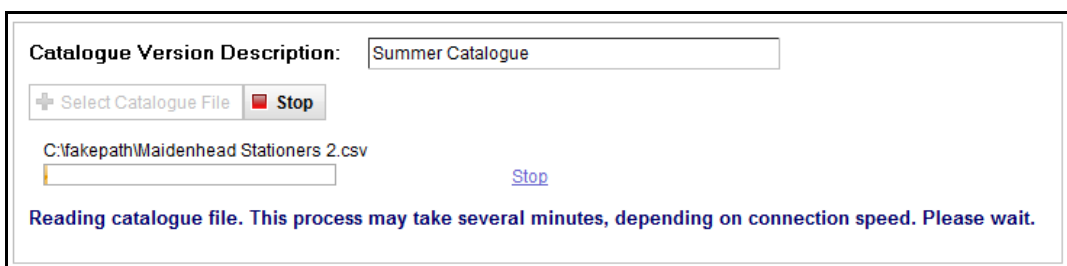


Upload initial catalogue file

To remove or replace the selected file prior to upload, click the **Cancel** link. The Select Catalogue File button will redisplay for you to select an alternate catalogue file for upload.

- Click the **Upload Catalogue File** button to proceed to upload the selected catalogue file.

A progress bar will display:



File upload progress

To cancel the upload before it completes, click the **Stop** button. The upload will be terminated and you will be able to select a new file for upload.

**5. Data will be automatically validated.**

A new version is now in progress and the uploaded file will be assigned a status depending upon the result of the validation process:

- 'Validated' – the file contains no errors and can be published as the current catalogue version. Alternatively, a file can be reloaded or it can be cancelled.
- 'Validation Failed' – the file contains errors and a valid file must be reloaded or the existing file must be cancelled.

**5.2.1 Validation**

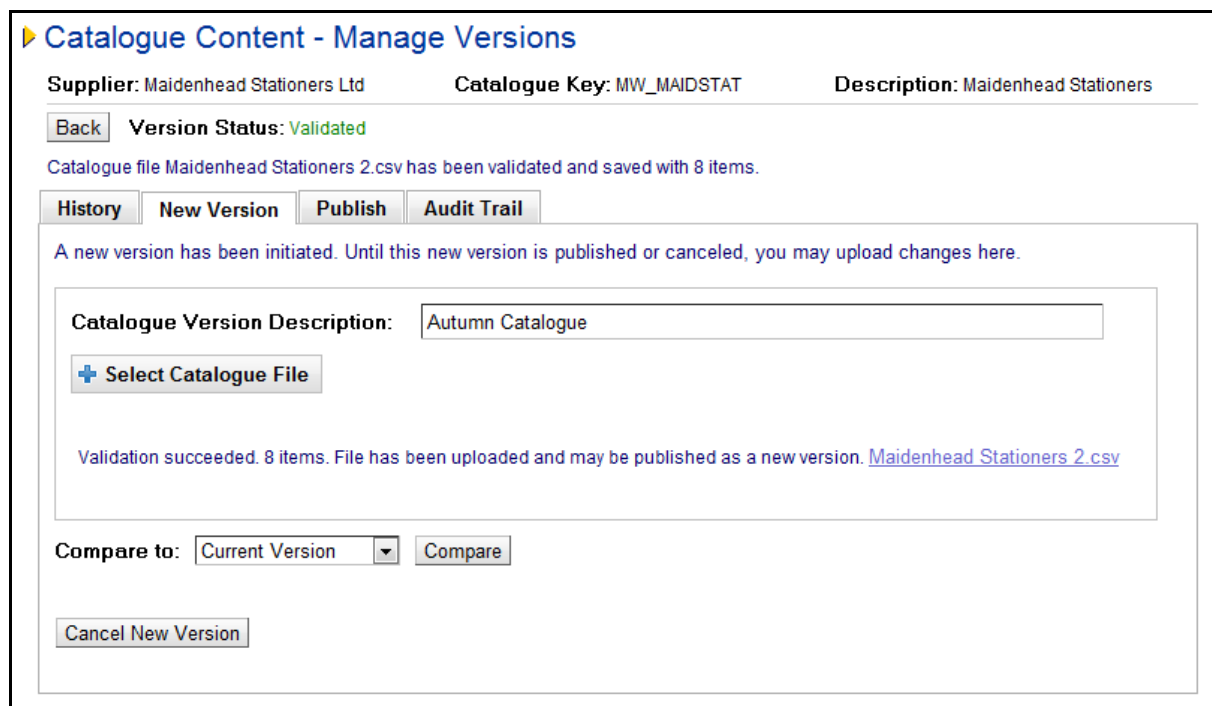
When a new version is initiated and a catalogue file uploaded, a validation process is run automatically and an appropriate status is assigned and displayed. (Additional information regarding the validation rule detail and validation report contents can be found in section 6 below.)

**5.2.1.1 Pass**

If the uploaded file **passes validation**, a new catalogue version is initiated and the file is committed to the database for reporting and comparison purposes.

A message will display at the top of the screen: "Catalogue file x has been validated and saved with y items" (where 'x' is the catalogue id and 'y' is the number of items in the file).

The status of the catalogue will display as 'Validated'.



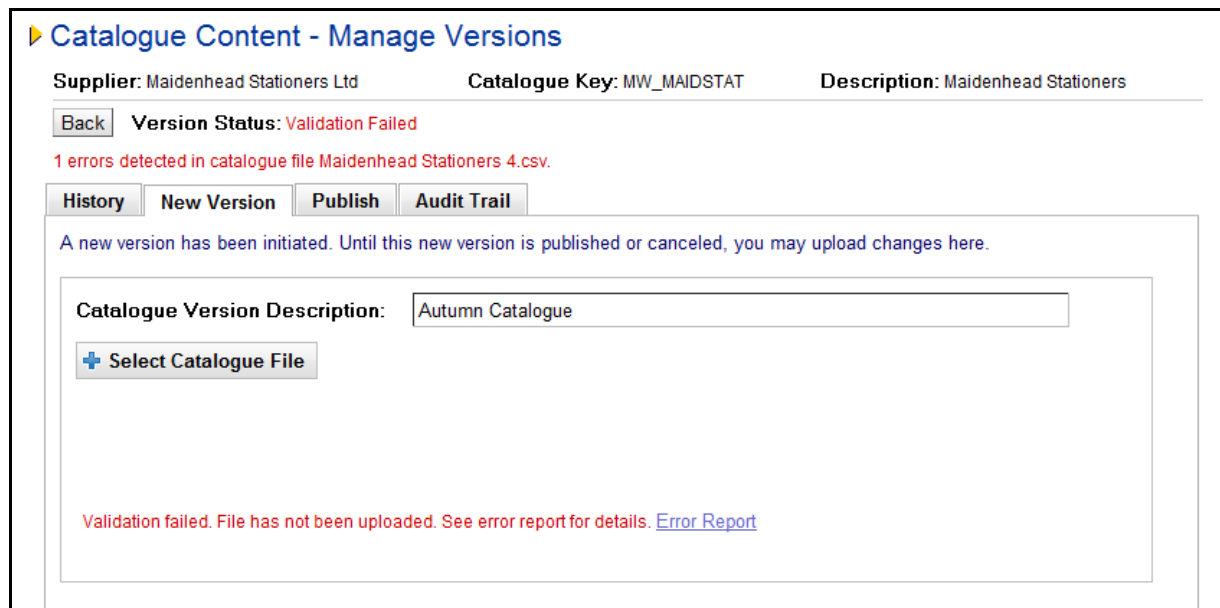
*Upload valid catalogue file*

A catalogue file that passes validation is available for publication (see section 8 below) but may also be optionally cancelled or re-loaded in the New Version tab.

**5.2.1.2 Fail**

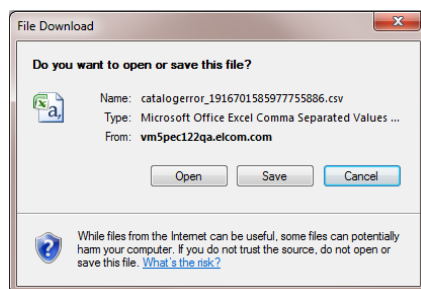
If the uploaded file **fails validation**, a message will appear at the top of the screen to advise the user how many errors were detected (x) in the uploaded file (y): "x errors detected in catalogue file y".

A new catalogue version is initiated with a status 'Validation Failed' but the file will not be committed to the database for reporting or comparison purposes. Comparison reports therefore cannot be run for files that fail validation.



*Upload invalid catalogue file*

Click on the [Error Report](#) link to download the validation failure report and follow the standard windows download instructions to open or save the file:



*Download error report*

Additional information about the validation process and an example of an error report is can be found in section 6 below.

A catalogue file that fails validation is not available for publication but must be either cancelled or re-loaded in the new version screen.

### 5.2.2 Audit Trail

After each upload an Audit Trail entry will be made which will include:

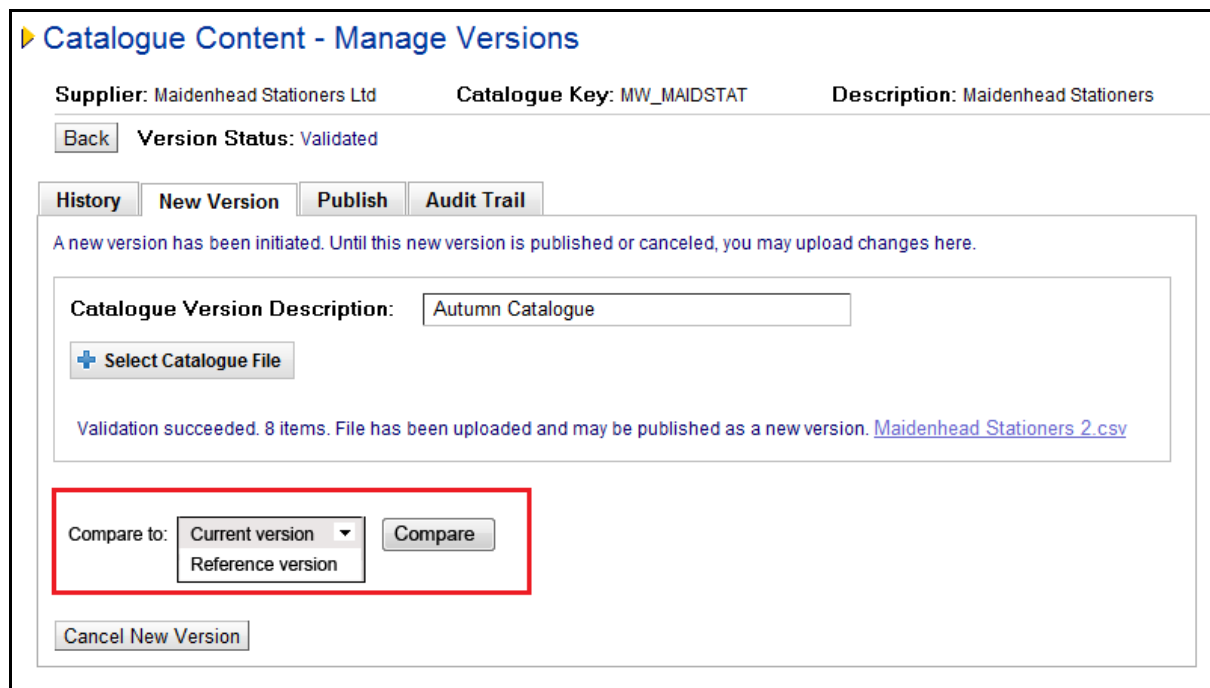
- Date and time of the upload.
- Whether the validation succeeded or failed.
- Catalogue Description
- No of items in the file (for successful loads)
- No of failed items (for failed loads)
- Link to download the catalogue file (for successful loads)
- Link to download the error report (for failed loads)

Any subsequent reloading of the catalogue file will replace the existing audit entry. Only one validation audit trail entry will therefore appear for each initiated catalogue.



### 5.3 Compare Version

After a file upload is completed, if it is a valid file, it is possible to run a **Comparison Report** to compare it to the current or the reference version of the catalogue (when available), prior to it being published.



*Compare a valid uploaded file*

1. In the **Compare to** drop down box, select one of the following options to compare the valid uploaded file to:
  - Current version – this option will only appear if a current version is available
  - Reference version – this option will only appear if there is a published reference version available

If the comparison drop down box does not display, there is neither a current nor reference version available for comparison.

2. Click the **Compare** button to initiate the comparison report.
3. The comparison reports will generate.
4. Two reports are available for download:
  - Price Changes
  - Content Changes
5. Click on one of the report links to either open or download and save the report as an Excel spreadsheet.

Comparisons will be recorded and saved in the **Audit Trail** where the reports will be available for download at a future date.

Refer to section 7 below for additional information and a detailed description of the content of the comparison reports.

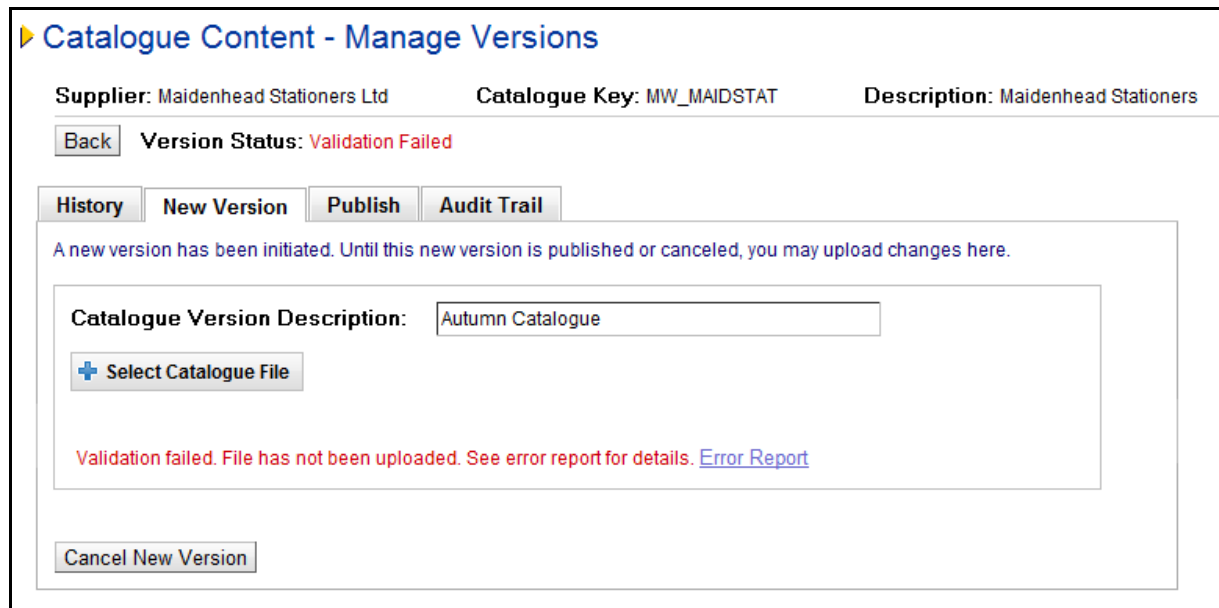
### 5.4 Reload New Version

After a new catalogue version has been initiated, whether it is valid or invalid, as long as the catalogue has not been published (i.e. a new version created), changes can be made by reloading the file.

Reloading a catalogue file will always **fully replace** (i.e. overwrite) the existing catalogue file.

Unless cancelling the new catalogue version, it will always be necessary to reload the file if the initial or previous load has failed validation. It is not possible to publish a catalogue that is not validated.

When selecting a catalogue in the Find Catalogue screen that is in progress (i.e. a new version has been uploaded) you will be taken directly to the **New Version** screen.

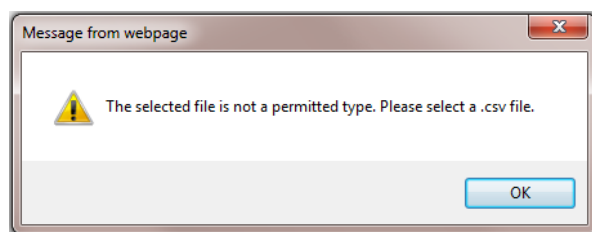


*Reload failed catalogue file*

The process for reloading a catalogue file is similar to that of loading an initial file. To reload a catalogue file follow these steps:

1. The catalogue version description field will display the description that was entered when the file was initially uploaded. The text can be optionally edited to change the description for the new catalogue file.
2. Click the **Select Catalogue File** button.
3. In the file chooser pop up window, search and open the catalogue file to be reloaded.

The selected file must be a .csv (comma separated values) file. If a differently formatted file is selected the following error message will display:



*Invalid file type error*

Click 'OK' and re-select a file that is correctly formatted (i.e. a csv).

4. After choosing the file for upload an **Upload Catalogue File** button will become available and the name of the selected file will display.  
To remove or replace the selected file click the **Cancel** link. The Select Catalogue File button will redisplay for you to select an alternate catalogue file for upload.
5. Click the **Upload Catalogue File** button to proceed to upload the selected catalogue file. A progress bar will display. To cancel the upload before it completes, click the **Stop** button.
6. Data will be **validated**.

The reloaded file will replace the original and will be assigned a status depending upon the result of the validation process:

- 'Validated' – the file contains no errors and can be published as the current catalogue version. Alternatively, a file can be reloaded or it can be cancelled.
- 'Validation Failed' – the file contains errors and a valid file must be reloaded or the existing file must be cancelled.

### 5.4.1 Validation

When a new version is reloaded the validation process is rerun automatically and an appropriate status is assigned. (Additional information regarding the validation rule detail and validation report contents can be found in section 6 below.)

#### 5.4.1.1 Pass

If the reloaded file **passes validation** the file is committed to the database for reporting and comparison purposes.

A message will display at the top of the screen: "Catalogue file x has been validated and saved with y items" (where 'x' is the catalogue id and 'y' is the number of items in the file).

The status of the catalogue will display as 'Validated'.

The screenshot shows the 'Catalogue Content - Manage Versions' page for 'Maidenhead Stationers Ltd' with key 'MW\_MAIDSTAT'. The 'Version Status' is 'Validated'. A message states: 'Catalogue file Maidenhead Stationers 2.csv has been validated and saved with 8 items.' The 'New Version' tab is active, showing a message: 'A new version has been initiated. Until this new version is published or canceled, you may upload changes here.' Below this, there is a text input for 'Catalogue Version Description' containing 'Autumn Catalogue', a '+ Select Catalogue File' button, and a validation success message: 'Validation succeeded. 8 items. File has been uploaded and may be published as a new version. Maidenhead Stationers 2.csv'. At the bottom, there is a 'Compare to:' dropdown set to 'Current Version' with a 'Compare' button, and a 'Cancel New Version' button.

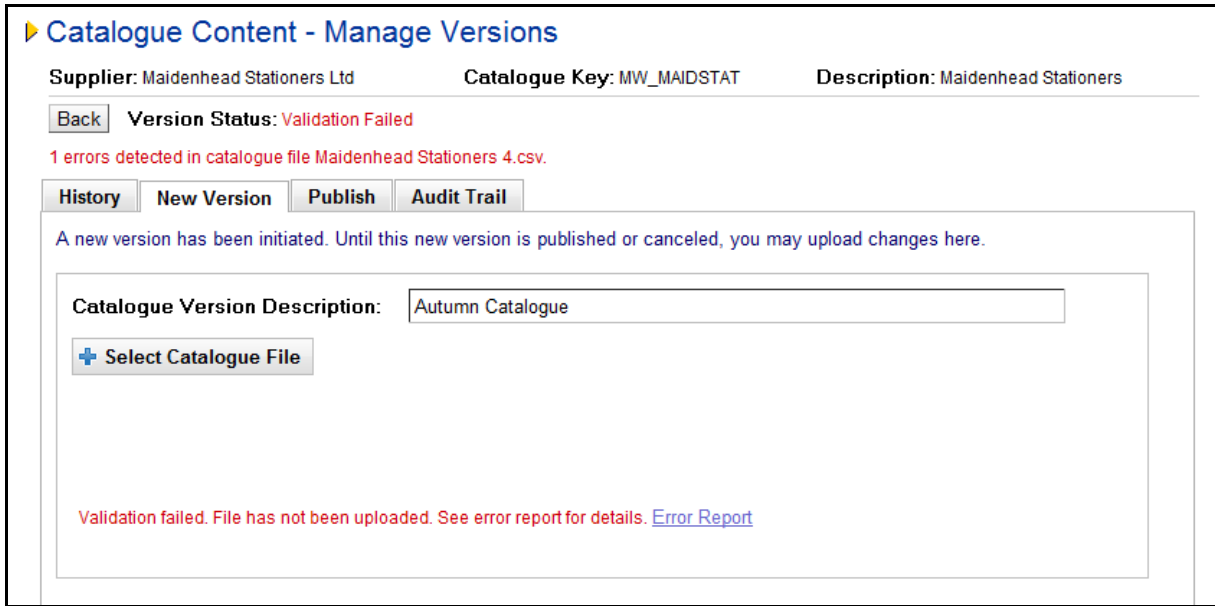
#### Upload valid catalogue file

A catalogue file that passes validation is available for publication (see section 8 below) but may also be optionally cancelled or re-loaded in the New Version tab.

#### 5.4.1.2 Fail

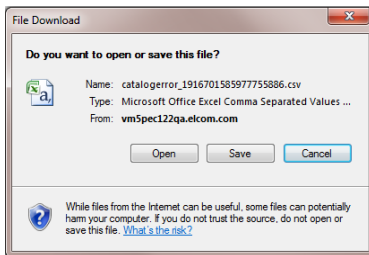
If the reloaded file **fails validation**, a message will appear at the top of the screen to advise the user how many errors were detected (x) in the uploaded file (y): "x errors detected in catalogue file y".

A new catalogue version remains initiated with a status 'Validation Failed' but the file will not be committed to the database for reporting or comparison purposes. Comparison reports therefore cannot be run for files that fail validation.



*Upload invalid catalogue file*

Click on the [Error Report](#) link to download the validation failure report and follow the standard windows download instructions to open or save the file:



*Download error report*

Additional information about the validation process and an example of an error report is can be found in section 6 below.

A catalogue file that fails validation is not available for publication but must be either cancelled or re-loaded in the new version screen.

### 5.4.2 Audit Trail

After each upload an Audit Trail entry will be made which will include:

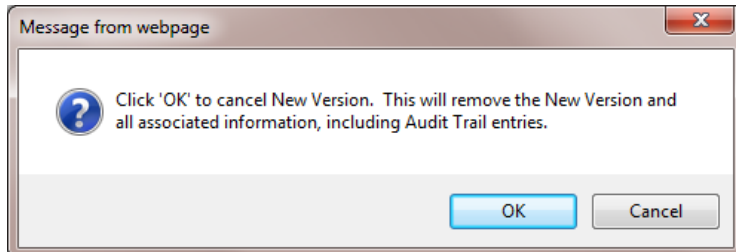
- Date and time of the upload.
- Whether the validation succeeded or failed.
- Catalogue Description
- No of items in the file (for successful loads)
- No of failed items (for failed loads)
- Link to download the catalogue file (for successful loads)
- Link to download the error report (for failed loads)

Any subsequent reloading of the catalogue file will replace the existing audit entry. Only one validation audit trail entry will therefore appear for each initiated catalogue.

## 5.5 Cancel New Version

After a new version has been initiated a **Cancel new version** button will appear in the New Version tab allowing the user to cancel and reset the catalogue upload process. Clicking this button will delete the current catalogue file, remove associated audit trail entries, remove the initiated version from the New Version tab and enable a new catalogue version to be initiated.

A warning message will display requiring confirmation of the cancellation. Click 'OK' to proceed.



*Cancellation warning message*

## 5.6 Concurrent Uploads

PCM supports uploading catalogues concurrently. After the first catalogue file has been selected and the upload started, return to the search screen to select your next catalogue. A subsequent catalogue file can be selected and uploaded, irrespective of whether previous file uploads have completed.

## 6 Validation

The upload process (for initial loads and reloads) will automatically validate the catalogue file for content and quality.

If the catalogue file **fails validation**, the new version is placed on a status of 'Validation Failed' and an error report is generated.

If the catalogue file **passes validation**, the new version is placed on a status of 'Validated' and no error report is generated.

### 6.1 Data Validation Rules

The following tests are performed automatically during data validation:

**Catalogue Format.** The file must be a comma separated values file (.csv).

**Catalogue Key.** The catalogue key in the upload file must match the catalogue key of the selected catalogue and it must reside in the PECOS database.

**Transaction Type.** The file must contain a valid transaction type (i.e. A, C or D).

**Mandatory Fields.** All fields marked as mandatory in the current standard PECOS catalogue template must be present in the upload file.

#### Field Formats:

- **Length.** All fields are checked to ensure that data does not exceed the maximum allowable length.
- **Type.** All fields are checked to ensure that the format of the data is correct (i.e. string, decimal or integer).
- **Date.** All dates must be in the correct format for the locale of the PECOS supplier.
- **Invalid Characters.** All fields are checked for invalid characters (e.g. non-ascii).

**Field Content.** Where fields require specific selectable values or content these are validated:

- **URL.** All url's are checked to ensure they are correctly formed with 'http'.
- **Flag Type.** All yes/no fields are checked to ensure they are correctly completed with 'Y' and 'N' indicators.
- **Item Type.** The item types are allowable values (i.e. 'regular', 'config', 'consolidate' or 'ddoc')
- **Min/Max.** Minimum and maximum order quantity fields are validated with each other.
- **Images.** All images are checked for a valid suffix (i.e. .gif or .jpg)

**UNSPSC Codes.** The UNSPSC product classification codes assigned to each item are validated against the current version loaded in PECOS.

**Unit of Measure Codes.** The units of measure assigned to each item are validated against those loaded in the current version of PECOS.

**Dates.** Item validity dates are checked to ensure that start date is before the end date.

**Duplicate Items.** The file is checked to ensure that there are no duplicate part numbers contained within it.

**Dynamic Options.** The following dynamic options are checked for the catalogue administrator's logged in organisation:

- **Decimal Quantities.** Unless set to 'True' the use of decimals in the item quantity field will return an error.
- **Override Insert Product Category Codes.** Unless the System Option (Insert Product Category Codes) is enabled for override and this Dynamic Option is set to 'True', adding ad-hoc UNSPSC Codes will return an error.

**User Defined Fields.** All user defined catalogue fields are validated against those that are configured for use for the catalogue administrator's organisation in PECOS. If any field is set to mandatory it will also be made mandatory for the catalogue upload.

## 6.2 Validation Reports

When an uploaded catalogue file fails validation, an **error report** is generated and made available for download:

- For the **current** initiated (i.e. New) version:
  - In the History table
  - In the Audit Trail
- For **previous** invalid file uploads, in the Audit Trail only.

	A	B	C	D	E	F	G
1	Error(s) for /ccm_smb/uploads/catalog_8151715527011361991.csv						
2							
3	Line Number	Part Number	Field Name	Column Index	Max Length	Value	Description
4	1	23671	transactionType	1	1	AA	Value exceeds maximum length 1
5	1	23671	transactionType	1	1	AA	Column value must be one of A, C or D.
6	4	23674	transactionType	1	1		Missing required field.
7	4	23674	transactionType	1	1		Column value must be one of A, C or D.
8	5	23675	unspcCode	14	10		Missing required field.
9	6		itemNumber	16	20		Missing required field.
10	6		customerPrice	19	13		Missing required field.
11	6		customerPrice	19	13		Column value can not be converted to Money type.
12	7	45562	customerPrice	19	13		Missing required field.
13	7	45562	customerPrice	19	13		Column value can not be converted to Money type.
14	8	45563	unspcCode	14	10		Missing required field.
15	8	45563	customerPrice	19	13		Missing required field.
16	8	45563	customerPrice	19	13		Column value can not be converted to Money type.
17	9	45564	catalogueKeyName	3	35		Missing required field.
18	9	45564	catalogueKeyName	3	35		Selected Catalog Key Name does not match value in uploaded CSV file.
19	10	45565	itemDescription	17	255		Missing required field.
20	10	45565	unitofMeasureCode	21	6		Missing required field.
21	11	45566	itemDescription	17	255		Missing required field.

*Validation error report*

The error report contains details of all of the errors, grouped and sorted by line number, and listed in rows (one error per row). The file contains the following columns:

- **Line Number.** The line in the original uploaded file, in which the failed item appears.
- **Part Number.** The item number (sku code) of the failed item. Note that this field may also be blank if it has been omitted.
- **Field Name.** The name of the catalogue field for which the item has failed validation.
- **Column Number.** The column in which the failed catalogue field name appears.
- **Maximum Field Length.** The maximum field length of the failed catalogue field.
- **Value.** The failed value which appears in the failed catalogue field. Note that this field may also be blank if a mandatory field has been omitted.
- **Description.** The failure reason. These are described in detail below.

## 6.3 Validation Failures

The following **validation failure descriptions** may appear in a validation report:

**Missing required field.** The field is mandatory but contains no value.

**Value exceeds maximum length {x}** (where x is the number of allowed characters). The value entered is longer than the permitted number of characters for this field.

**Column value cannot be converted to money type.** The value in this field is the wrong data type (i.e. string, decimal or integer).

**Column value is not an integer.** The value in this field is the wrong data type (i.e. it is a string or decimal) and must be an integer.

**Decimal quantities not allowed.** The value in this field is the wrong data type (i.e. it is a decimal) and must be a string or an integer.

**Invalid decimal number.** The value in this field is the wrong data type (i.e. it is a string or an integer) and must be a decimal.

**Selected Catalogue Key Name does not match value in uploaded CSV file.** The catalogue key in the uploaded file is different from the catalogue key of the selected catalogue.



**Column value must be one of A, C or D.** The value entered is not allowed and must match one of the values indicated.

**Duplicate part number.** This line contains an item with the same part number as a previous line in the file.

**A date in the input file could not be parsed.** The date is invalid and must be in the format dd/mm/yyyy or mm/dd/yyyy, depending on locale of supplier.

**End Date occurs before Start Date.** The item validity dates are inaccurate: the end date predates the start date.

**URL must begin with http.** The supplier url field has been incorrectly formatted and must begin with http://

**Column value must be either 'N' or 'Y'.** This field has a missing or incorrect flag type and must match with one of the values indicated.

**This field is case sensitive Column value must be one of 'regular', 'config', 'consolidate' or 'ddoc'.** The item type field contains an illegal value which must be one of the fixed values indicated.

**Quantity is not valid.** This field contains an invalid quantity.

**Minimum quantity exceeds maximum quantity.** The minimum order quantity cannot be greater than the maximum order quantity.

**Could not validate Unit Of Measure code.** The unit of measure code is not a valid code that is loaded into your instance of PECOS.

**The Custom Price and discount are missing One of them is required.** The price fields are incomplete. Either the customer price or the discount field must be completed.

**The item number has character(s) that are not allowed.** This field contains an invalid sku code containing at least one invalid character.

**Definition of user field not found.** The user defined field definition cannot be found in PECOS.

**Missing user field value.** This field is a user defined field and must contain a value.

**Missing mandatory user field: {0}.** There are mandatory user defined fields which must be provided. The bracketed number indicates the number of fields.

**Missing user field key.** This field is a user defined field and must contain a key.

**Item user field is not valid for catalogues.** This field is not a catalogue type item user defined field.

**Item user field has predefined options This value is not a predefined option.** This field is a user defined field and must contain a value that has been predefined.

**Image must end with gif or jpg.** This image field has an incorrect or missing suffix.

**Error parsing UNSPSC code.** This UNSPSC field contains an invalid code

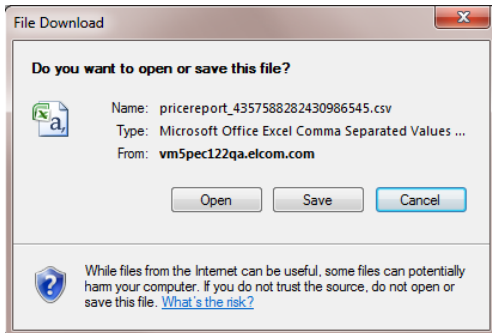
**Unknown error.** The system was unable to load this value due to an undefined reason. Please contact your local support representative.

## 7 Comparison Reports

Comparison reports can be run from either the History or New Version tabs and are available for download in the Audit Trail. The relevant sections above, describe in detail how comparison reports are generated.

### 7.1 Price Changes

To open or save the price changes comparison report click on the [Price Changes](#) link. A file download window will open:



Price changes comparison report file download

- Click 'Open' to open the report directly in a MS Excel window as a .csv file.
- Click 'Save' to open a directory window to save the report in your chosen folder.
- Click 'Cancel' to close the file download window.

#### 7.1.1 Contents

The price changes report contains differences between the **List Price** and **Customer Price** detail only. One changed item is listed per row and if there is no change to an item, it will not appear in the comparison report.

The report header will confirm which catalogue files are being compared:

- The first is the **source catalogue** (which the target catalogue is being compared to) and represents the price '**Before**' (in our example below this is the 'Contract Prices' catalogue).
- The second is the **target catalogue** (which is being compared to the source catalogue) and represents the price '**After**' (in our example below this is the 'Spring Catalogue').

	A	B	C	D	E	F	G	H	I
1	Report run on 19-Sep-2011 08:48:55 comparing Contract Prices with Spring Catalogue								
2			List Price			Customer Price			
3	SKU	Prod Name	Price Before	Price After	Difference	Price Before	Price After	Difference	
4	Clean 1	Contract cleaning service				£17.00	£20.00	17.65%	
5	Clean 2	Employee discounted car valet service				£8.00	£10.00	25%	
6	Cons 1	Consulting Services				£390.00	£400.00	2.56%	
7	Install 1	Desktop PC configuration, build and installation to desk	£120.00	£100.00	-16.67%	£65.00	£50.00	-23.08%	
8	Install 2	Portable PC configuration, build and installation to desk	£70.00	£100.00	42.86%	£25.00	£50.00	100%	
9	Repair 1	24 hour response on-site PC repair				£55.00	£60.00	9.09%	
10	Repair 2	4 hour response on-site PC repair				£90.00	£100.00	11.11%	
11	Train 1	Computer Training	£0.00	£600.00	New	£0.00	£500.00	New	
12									

Price comparison report

The report contains the following columns:

**SKU** – This is the part number (from the target catalogue) that has been changed.

**Prod Name** – This is the description of the part (from the target catalogue) that has changed.

**Price Before** – This is the original price contained in the first selected or source catalogue (in our example the 'Contract Prices' catalogue).

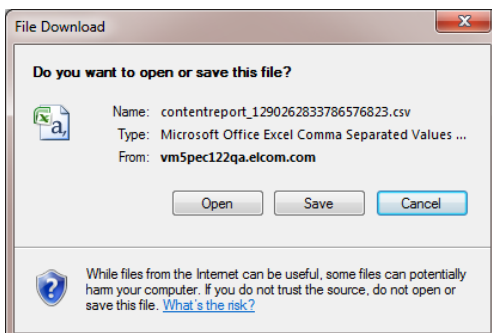
**Price After** – This is the new price contained in the second selected or target catalogue (in our example the 'Spring Catalogue')

**Difference** – This is difference between the before and after prices expressed as a percentage:

- A positive difference represents a price increase (i.e. the 'After' price in the target catalogue is greater than the 'Before' price in the source catalogue).
- A negative difference represents a price decrease (i.e. the 'After' price in the target catalogue is less than the 'Before' price in the source catalogue).
- 'New' represents a new item added to the target catalogue that did not have an original price. No difference can therefore be calculated.

## 7.2 Content Changes

To open or save the content changes comparison report click on the [Content changes](#) link. A file download window will open:



*Content changes comparison report file download*

- Click 'Open' to open the report directly in a MS Excel window as a .csv file.
- Click 'Save' to open a directory window to save the report in your chosen folder.
- Click 'Cancel' to close the file download window.

### 7.2.1 Contents

The content changes report contains differences between the selected catalogues *other than* to the List Price and Customer Price fields. All standard catalogue fields are displayed: changes to user defined catalogue fields are not included.

If there is no change to an item, it will not appear in the Content changes comparison report.

The report header will confirm which catalogue files are being compared:

- The first is the **source catalogue** (which the target catalogue is being compared to) and represents the item detail '**Before**' (in our example below this is the 'Spring Catalogue').
- The second is the **target catalogue** (which is being compared to the source catalogue) and represents the item detail '**After**' (in our example below this is the 'Winter Catalogue').

Additions and deletions will appear on a single row of the report but changes will be represented by two rows:

- **Changes:** the first row will contain the complete original detail from the source catalogue (the before position) and the second row will contain the detail of the changed fields only from the target catalogue (the after position).
- **Additions:** the full item detail contained in the new target catalogue will display.
- **Deletions:** the SKU code and product name from the original source catalogue only is displayed.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U		
1	Report run on 20-Sep-2011 11:17:45 comparing Spring Catalogue with Winter Catalogue																						
2	Type	SKU	Prod Name	Transaction Type	Supplier No	Catalogue Keyword	Le	Le	Le	Le	Le	Le	Le	Le	Le	Le	UNSPSC Code	Mat	Item	SKU	Desc	Discount	Unit of Mea
3	Change	Clean 2	Employee discounted car valet service	C	MAIDSTAT	MW_MAIDSTAT											91111801				Employee discounted car valet service	5	EA
4																	76111500				Employee discounted car valet silver service		BX
5	Add	Clean 3	Employee discounted car valet gold service	A	MAIDSTAT	MW_MAIDSTAT											91111801				Employee discounted car valet gold service	40	EA
6	Change	Cons 1	Consulting Services	C	MAIDSTAT	MW_MAIDSTAT											81111809				Consulting Services	400	EA
7																						50	
8	Change	Repair 1	24 hour response on-site PC repair	C	MAIDSTAT	MW_MAIDSTAT											81111811				24 hour response on-site PC repair	60	EA
9																						48	EA
10	Change	Repair 2	4 hour response on-site PC repair	C	MAIDSTAT	MW_MAIDSTAT											81111811				4 hour response on-site PC repair	100	EA
11																	81111809						
12	Delete	Train 1	Computer Training																				
13																							

*Content comparison report*

The report contains the following columns:

**Type** – This is the description of the change and will display one of the following values:

- **Change:** The item has at least one changed value
- **Add:** The item (i.e. the SKU) did not exist in the original source catalogue and has been added to the target catalogue.
- **Delete:** The item (i.e. the SKU) existed in the original source catalogue but has been removed in the target catalogue.

**SKU** - This is the part number (from the target catalogue) that has been changed.

**Prod Name** - This is the description of the part (from the target catalogue) that has changed.

**Transaction Type** – This field is the transaction type required by the PECOS loadcat program and will display the value that would appear in the catalogue file: A (Add), C (Change) or D (Delete).

**Supplier Number** – This is the supplier key from the supplier profile in PECOS.

**Catalogue Keyword** – This is the catalogue keyword associated to the catalogue in PECOS

The remaining fields represent those that are found in the standard PECOS catalogue template, and are listed in the same order, beginning with the level 1 bespoke commodity code.

## 8 Publish

The **Publish** tab is where a validated new version is published as the new current version of the catalogue. If the file uploaded for the new version fails validation it will not be possible to publish this until it has passed validation (i.e. a valid file has been reloaded).

### 8.1 Header

The top of the **Manage Versions** screen displays summary catalogue information (supplier, catalogue key and description) and status detail for the catalogue selected.

 Click the **Back** button to return to the **Find Catalogue** screen to undertake a new search.

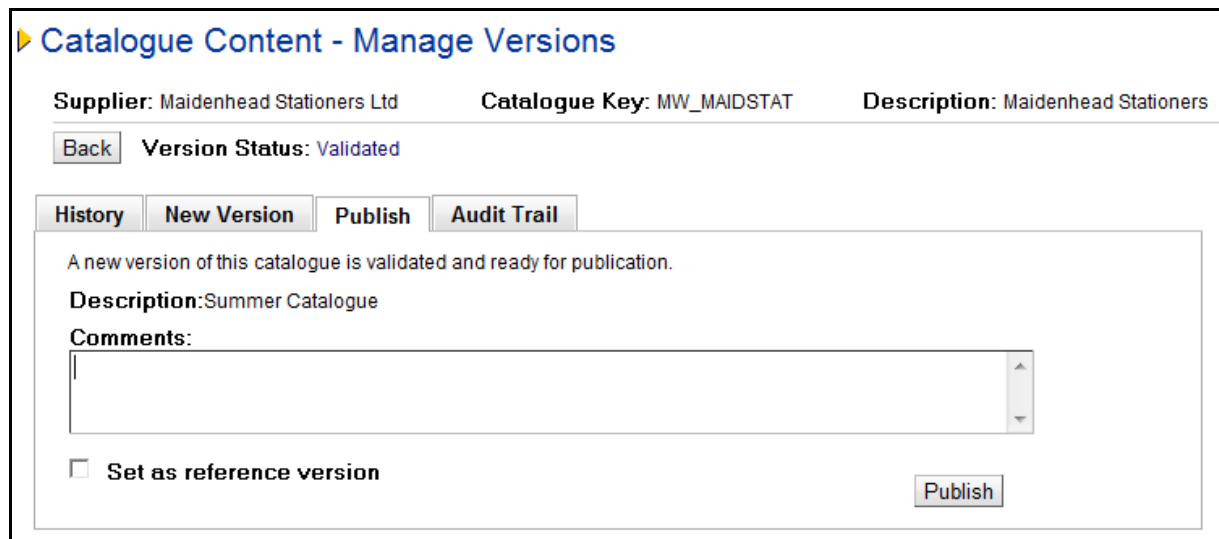
**Version Status** will display the current status of any new catalogue version under management:

- **A new version has not been initiated** – a file has not yet been uploaded to initiate a new catalogue version.
- **Validated** – a new version has been initiated: a valid catalogue file has been uploaded and is available to be published as the new current catalogue.
- **Validation Failed** – a new version has been initiated: an invalid catalogue file has been initiated and cannot be published (the file must be reloaded or cancelled).

### 8.2 Publication Process


The publication process in the PCM has the following affect when the new validated version is published:

- The published version becomes the current catalogue and is given the status 'Current'.
- A new version number is automatically and sequentially assigned to the published version.
- The catalogue appears in the History table.
- The existing current catalogue version changes status to 'Superseded'.
- The published version becomes available for export.
- The new version status is reset to 'A new version has not been initiated'.



**Catalogue Content - Manage Versions**

Supplier: Maidenhead Stationers Ltd      Catalogue Key: MW\_MAIDSTAT      Description: Maidenhead Stationers


 Version Status: Validated

History    New Version    Publish    Audit Trail

A new version of this catalogue is validated and ready for publication.

Description: Summer Catalogue

Comments:

Set as reference version      

*Publish valid catalogue*

To publish the new version, follow these steps:

1. Enter publication **Comments** in the 'Comments' text box. These comments are mandatory and will appear in the 'More Information' column of the History table and Audit Trail.
2. Click the **publish** button.
  - A new sequential version number is assigned.
  - The new version is published as the current catalogue with a status of 'Current'.

- The previous version that was 'Current' will be replaced and will have its status changed to 'Superseded'.
3. A **File Download** window will open for you to Open or Save the catalogue as a .csv file.  
If the File Download window does not open automatically (due to restrictions imposed by your browser settings), click on the link provided.  
An 'Export catalogue file' link is also made available in the Audit Trail.
  4. The downloaded catalogue file is in the correct format for loading directly into PECOS and can now be submitted into any additionally required business process and then transmitted for loading to PECOS in the usual way.

### 8.3 Invalid New Versions

If a new version is not validated (i.e. has the status of 'Validation Failed') or has not been initiated, it will not be possible to publish a catalogue. The Publish tab will:

- Display the text: "A new version of this catalogue is not available for publication"
- The Description will be non-editable
- The 'Publish' button, reference version check box and comments area will all be greyed out.

The screenshot shows the 'Catalogue Content - Manage Versions' page for 'Maidenhead Stationers Ltd' with Catalogue Key 'MW\_MAIDSTAT'. The 'Version Status' is 'Validation Failed'. The 'Description' is 'Maidenhead Stationers'. The 'History' tab is active, showing a message: 'A new version of this catalogue is not available for publication.' Below this, the 'Description' is 'Winter Catalogue' and there is a 'Comments' text box. A 'Set as reference version' checkbox is present and unchecked. The 'Publish' button is greyed out.

*Publish invalid catalogue*

### 8.4 Reference Version

A catalogue can be set as a reference version for reporting purposes. For example, a catalogue containing contract or list prices could be uploaded purely for the purposes of running comparison reports.

Having a reference version is not mandatory but only one reference version can exist. Any subsequent publication of a new version that is set as a reference version will replace any existing reference version.

To publish a catalogue as a reference version follow these steps:

1. Enter publication **Comments** in the 'Comments' text box. These comments are mandatory and will appear in the 'More Information' column of the History tab and the Audit Trail.
2. Check the '**Set as reference version**' box.
3. Click the **Publish** button.
4. Click on the 'Download' link to download the catalogue.

The catalogue version and status will be treated the same as all other published catalogues but will in addition be labelled as the 'Reference Version' in the Catalogue History table.

## 9 Catalogue Audit Trail

The **Audit Trail** tab is where the user is able to view all of the transaction history for the selected catalogue.

The audit table is automatically updated each time an auditable catalogue management transaction takes place (e.g. catalogue upload or publication event).

▶ **Catalogue Content - Manage Versions**

Supplier: Maidenhead Stationers Ltd      Catalogue Key: MW\_MAIDSTAT      Description: Maidenhead Stationers

[Back](#)    Version Status: A new version has not been initiated

History    **New Version**    Publish    **Audit Trail**

Showing all entries.    [Show recent only](#)

Date	Action	User	More Information
19/09/2011 12:29 EDT	Published	Mike Watson	Version 3 published Summer Catalogue. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 12:21 EDT	Validation Succeeded	Mike Watson	8 total items Summer Catalogue. <a href="#">Maidenhead Stationers 2.csv</a>
19/09/2011 08:57 EDT	Published	Mike Watson	Version 2 published Spring Catalogue. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 08:48 EDT	Compared	Mike Watson	Version Spring Catalogue compared with version Contract Prices. <a href="#">Price changes</a> <a href="#">Content changes</a>
19/09/2011 08:31 EDT	Validation Succeeded	Mike Watson	8 total items Spring Catalogue. <a href="#">Maidenhead Stationers 1.csv</a>
19/09/2011 07:28 EDT	Published	Mike Watson	Version 1 published as reference version Contract Prices. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 07:28 EDT	Validation Succeeded	Mike Watson	8 total items Contract Prices. <a href="#">Maidenhead Stationers_2011 Contract Prices.csv</a>

Catalogue audit trail table

### 9.1 Header

The top of the **Manage Versions** screen displays summary catalogue information (supplier, catalogue key and description) and status detail for the catalogue selected.

[Back](#) Click the **Back** button to return to the **Find Catalogue** screen to undertake a new search.

**Version Status** will display the current status of any new catalogue version under management:

- **A new version has not been initiated** – a file has not yet been uploaded to initiate a new catalogue version.
- **Validated** – a new version has been initiated: a valid catalogue file has been uploaded and is available to be published as the new current catalogue.
- **Validation Failed** – a new version has been initiated: an invalid catalogue file has been initiated and cannot be published (the file must be reloaded or cancelled).

### 9.2 Audit Detail

The default view only displays audit details of the audit transactions for the **'Current'** catalogue version and any **'New'** version: valid or invalid (i.e. up to two catalogue versions).

[Show all](#) To display all audit transaction detail (i.e. to include all superseded catalogue versions) click the 'Show all' button. The audit table will be extended and may require scrolling.

[Show recent only](#) To hide the extended audit transaction detail and redisplay the default view, click the 'Show recent only' button.

### 9.3 Table Contents

Each row in the audit table contains one transaction with the following detail:

**Date** - The date and time of the transaction

**Action** - One of the following actions will be associated to the transaction:



- **Validation Succeeded** – the uploaded file passed validation
- **Validation Failed** – the uploaded file failed validation
- **Compared** – a comparison report was run
- **Published** – a catalogue version was published

**User** - The name of the user who undertook the transaction

**More Information** - The detail displayed in this column will depend on the audit action:

- **Compared:**
  - Catalogue Version Description of the two catalogues compared
  - Link to download comparison reports (click to open or save file)
- **Published:**
  - Version number published
  - Catalogue Version Description
  - Link to export the catalogue file (click to open or save file)
  - Link to display the publication comments (click to display)
- **Validation Succeeded:**
  - Total number of items in the catalogue file
  - Catalogue Version Description
  - Link to download the original catalogue file (click to open or save file)
- **Validation Failed:**
  - Total number of items in the catalogue file
  - Catalogue Version Description
  - Link to download the error report

## 10 User Audit Trail

The **User Audit** option is separate from the Content Management options and is found by navigating the PECOS main menu: Catalogue > Catalogue Content > User Audit.

The purpose of the **User Audit Trail** is to provide a detailed search of all transactions across all catalogues that have been undertaken by the logged in user. The user is able, for example, to search all published catalogues for a single supplier.

The screenshot shows the 'User Audit Trail' interface. At the top, it displays 'User Name: Mike Watson'. Below this are three search filters: 'Supplier (starts with)' with an empty text box, 'Catalogue Key (starts with)' with an empty text box, and 'Action' with a dropdown menu set to 'All'. A 'Date' section includes radio buttons for 'Today' (selected) and 'Date Range', followed by 'from' and 'to' date pickers with 'clear date' buttons. 'Clear' and 'Search' buttons are on the right. Below the filters is a table with columns: 'Date', 'Supplier', 'Catalogue Key', 'Action', and 'More Information'. The table is currently empty, showing 'No Data'.

User audit screen - blank

The user for whom audit transactions will be searched is displayed at the top of the page. This is the name of the logged in PECOS user and cannot be changed. Only transactions associated to this user will be searched and displayed.

### 10.1 Search

A number of options are available to refine the audit transaction search. The default setting will search all actions for all supplier catalogues for the date of 'Today'. Multiple options may be selected to logically target transactional criteria and limit the search results.

**Supplier** - Enter partial text to refine the search for the name of a supplier. All catalogue transactions found for all suppliers *that begin with* the entered text will be returned. The search is not case sensitive.

The supplier search is an intuitive field that will prompt you with matching results as criteria is entered. When displayed, optionally select a supplier name to automatically populate the search field. This will limit the transaction search for the selected supplier only.

The screenshot shows the 'Supplier (starts with)' search field with the text 'Wat' entered. A dropdown menu is open, displaying a list of suppliers: 'WATERMILL COACHES LTD', 'Water Coolers Scotland Ltd', 'Waterlow Legal and Regulatory', 'Waters UK Ltd', 'Waterstone's Booksellers Ltd.', 'Watlow Ltd', and 'Watsons Waffles & Sons Ltd'. The last option is highlighted in blue.

Supplier search

**Catalogue Key** - Enter partial text to search for a catalogue key. All catalogue transactions associated to the catalogue key *that begin with* the entered text will be returned. The search is not case sensitive.

The catalogue search is an intuitive field that will prompt you with matching results as criteria is entered. When displayed, optionally select a catalogue key to automatically populate the search field. This will limit the transaction search for the selected catalogue key only.


The screenshot shows the 'Catalogue Key (starts with)' search field with the text 'm' entered. A dropdown menu is open, displaying a list of catalogue keys: 'MW\_MAIIDSTAT', 'MW\_MAIIDSTATCORE', 'MW\_Wats Waffles', and 'McAdams'. The third option is highlighted in blue.


Catalogue search


**Action** – The default is ‘All’ but the search results can be refined by selecting one of the following action codes from the drop down box:

- **Compared** – This will limit the search results only to instances of the running of comparison reports.
- **Published** – This will limit the search results only to the publication of new versions.
- **Validation Succeeded** – this will limit the search results only to instances when a valid catalogue file was loaded.
- **Validation Failed** – this will limit the search results only to instances when an invalid catalogue file was loaded.

**Date** – Select one of the following options to refine the search by date:



- **Today** (default) – Only transactions undertaken today will be displayed
-  **Date Range** – Select the radio button and enter a start and end range either by overtyping the default date displayed (in the format dd/mm/yyyy) or by using the pop up date pickers.

 After entering search options, click the search button to find all catalogue transactions that match the entered criteria.

 To reset all search options back to their default setting, click the ‘Clear’ button.

## 10.2 Transaction Detail

All transactions that match the search criteria entered, for the logged in user, will be returned in the audit transaction table.

User Audit Trail				
User Name: Mike Watson				
Supplier: Maidenhead		Catalogue Key:		Action: All
Date: <input type="radio"/> Today <input checked="" type="radio"/> Date Range		19/09/2011  to 20/09/2011 		<input type="button" value="Clear"/> <input type="button" value="Search"/>
Date	Supplier	Catalogue Key	Action	More Information
19/09/2011 12:29 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Published	Version 3 published Summer Catalogue. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 12:21 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Validation Succeeded	8 total items Summer Catalogue. <a href="#">Maidenhead Stationers 2.csv</a>
19/09/2011 08:57 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Published	Version 2 published Spring Catalogue. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 08:48 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Compared	Version Spring Catalogue compared with version Contract Prices. <a href="#">Price changes</a> <a href="#">Content changes</a>
19/09/2011 08:31 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Validation Succeeded	8 total items Spring Catalogue. <a href="#">Maidenhead Stationers 1.csv</a>
19/09/2011 07:28 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Published	Version 1 published as reference version Contract Prices. <a href="#">Export catalog file</a> <a href="#">Comments</a>
19/09/2011 07:28 EDT	Maidenhead Stationers Ltd	MW_MAIDSTAT	Validation Succeeded	8 total items Contract Prices. <a href="#">Maidenhead Stationers 2011 Contract Prices.csv</a>

User audit screen – results displayed

Transactions are listed, one per row with the following detail:

**Date** – The transaction date, time and time zone

**Supplier** – The name of the supplier to whom the transaction is associated

**Catalogue Key** – The catalogue key to which the transaction is associated

**Action** – The transaction action code (see above)

**More Information** – The detail displayed in this column will depend on the audit action:

- **Compared:**
  - Catalogue Version Description of the two catalogues compared

- Link to download comparison reports (click to open or save file)
- **Published:**
  - Version number published
  - Catalogue Version Description
  - Link to export the catalogue file (click to open or save file)
  - Link to display the publication comments (click to display)
- **Validation Succeeded:**
  - Total number of items in the catalogue file
  - Catalogue Version Description
  - Link to download the original catalogue file (click to open or save file)
- **Validation Failed:**
  - Total number of items in the catalogue file
  - Catalogue Version Description
  - Link to download the error report (click to open or save file)

Clicking on a column header will sort the audit detail table alternately in descending and then ascending order to enable the user to more easily locate a specific transaction.