PECOS P2P

Version 15.0

Catalogue Load
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Contents

1.   Introduction

1.1   About this Manual

This manual is designed for system administrators, to provide an overview of the Catalogue Load process and content for PECOS P2P.

Elcom provides a full hosting and loading service for catalogue content through the **loadcat** utility.

A catalogue is a list of items or products from a supplier (who can have more than one catalogue), including description, price, image filename, date range for availability, etc.

The file must be in .**csv** format and an Excel template is provided to assist with catalogue data creation and management. Additionally a **Content Management** feature in PECOS P2P enables the catalogue file to be uploaded, stored, version controlled and validated: reports generated for the identification of errors and price changes.

1.2   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 twenty 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 contract. For more information please contact http://www.elcom.com.

1.3   About PECOS

PECOS is a fully hosted 'cloud' solution that enables buying organisations of all sizes to automate their purchasing processes and leverage the benefits of eProcurement.

PECOS is not installed directly within your organisation but resides in a remote data centre: as a PECOS user, the system is simply available from anywhere within your organisation from any desktop running a standard a web browser as well as from iPad, iPhone, Blackberry or Android.

PECOS P2P is an easy to use and convenient application for ordering all maintenance, repair, and operations (MRO) items, goods and services your organisation needs to run its day-to-day business. PECOS P2P provides a full-circle P2P solution: from ordering via electronic catalogues, through approval routing, to delivery and financial settlement. A wealth of information is captured and reported to support purchasing professionals for more effective management of strategic suppliers.

At the heart of PECOS P2P is a best of breed workflow engine which manages transactions and approvals, and supports seamless interfaces into finance and ERP systems. Purchase information and General Ledgers can be updated in real time with easy reconciliation of commitments and spend at period end.

PECOS P2P works for suppliers too. Suppliers can receive orders by multiple channels - from eMail and Fax to direct electronic XML interface with a supplier's Sales Order Processing System. Invoices can be processed through PECOS P2P, or suppliers can submit electronic invoices directly for two or three-way matching and settlement.

1.3.1   Configuration and Business Rules

PECOS P2P will be configured and customised for your organisation so that your approval process follows your business rules.

- The access that each user has to data such as catalogues and account codes as well as access to read other users orders and requisitions is restricted by individual User Profiles maintained by your System Administrator.
- The format and content of Requisitions is automated. PECOS P2P will populate default data from user and supplier profiles to expedite the accurate completion of each order request. After selecting the items you wish to order, there may be no need to anything else other than click 'submit'!
- PECOS P2P will automatically route requisitions and order requests to the individuals and managers (approvers) your organisation specifies. This approval routing cannot be by-passed by a requisitioner.
- PECOS P2P can put time limits on approval steps and may contain 'escalations' to ensure that a document does not get stuck in the approval process.
- Purchase orders are automatically created and transmitted electronically to your suppliers after all the necessary approval steps have been completed.
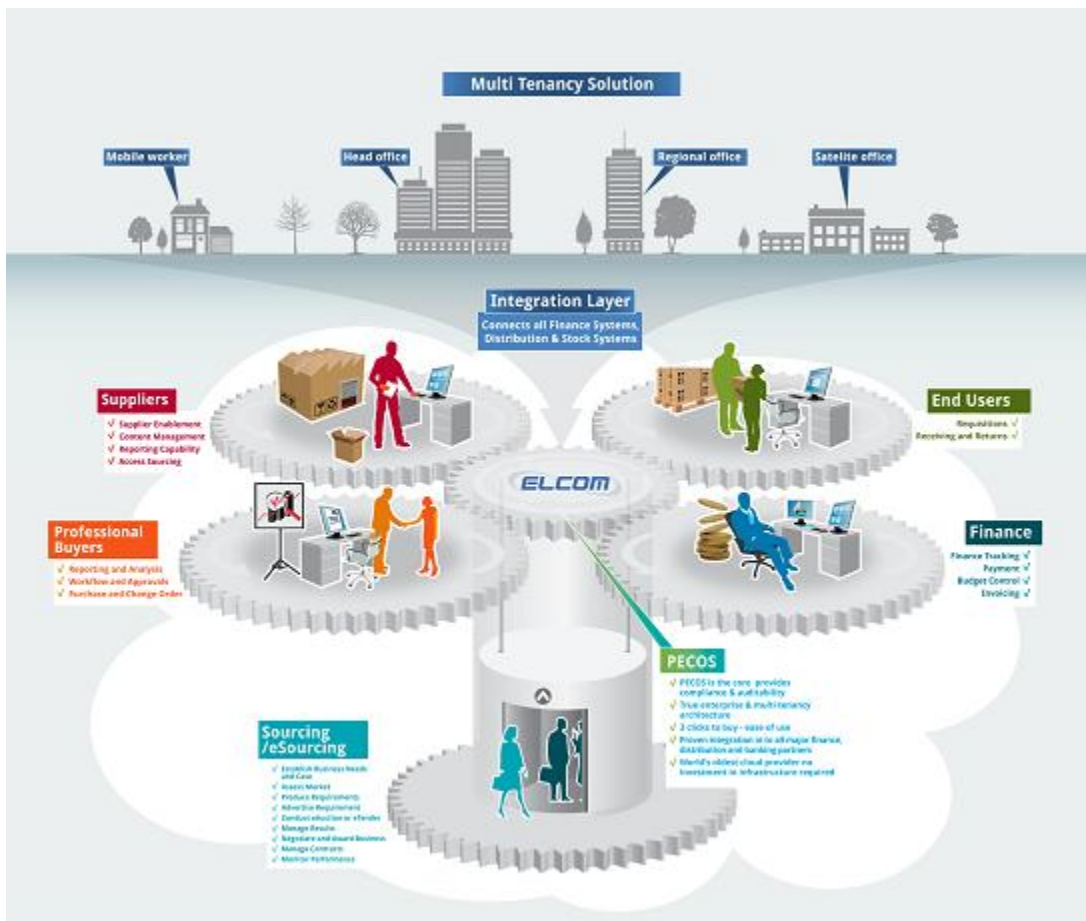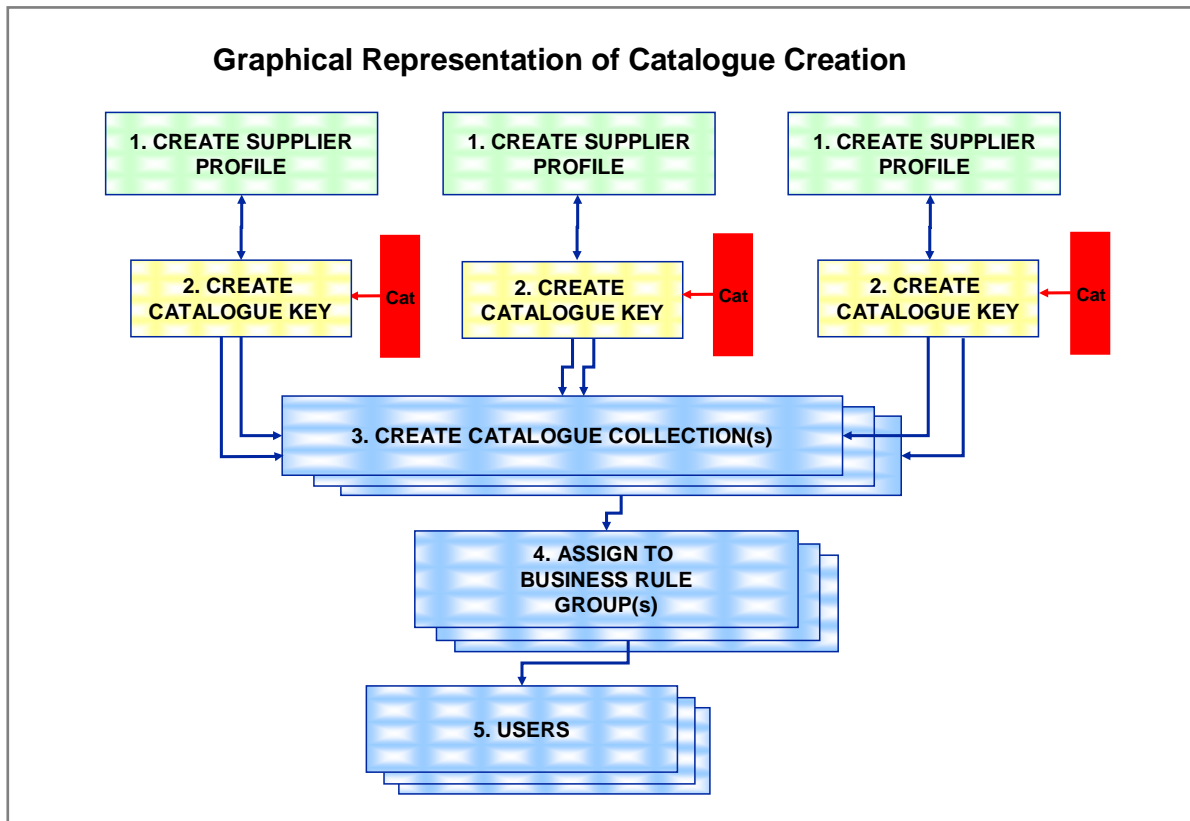
1.4   System Requirements

Details of required software, supported platforms and web browsers can be found in the current version of the **Supported Technology Guide for PECOS**.

Note that the recommended platform will greatly enhance performance. If you are in any doubt please speak to your local IT department.

2. Setup for Catalogue Load

A sequence of steps needs to be taken by the PECOS P2P administrator prior to the loading of a supplier catalogue.

Graphical Representation of Catalogue Creation

1. CREATE SUPPLIER PROFILE	1. CREATE SUPPLIER PROFILE	1. CREATE SUPPLIER PROFILE
2. CREATE CATALOGUE KEY ← Cat	2. CREATE CATALOGUE KEY ← Cat	2. CREATE CATALOGUE KEY ← Cat

3. CREATE CATALOGUE COLLECTION(s)

4. ASSIGN TO BUSINESS RULE GROUP(s)

5. USERS

Standard setup steps for loading a supplier catalogue

2.1 Supplier Setup

A supplier must exist in PECOS P2P before a catalogue can be loaded. Please ensure the supplier type is 'Catalogue Only' or 'Catalogue and Non-Catalogue'.

Supplier are created by navigation to Suppliers > Profile. Please refer to the PECOS P2P Administration Guide for further information on creating and managing suppliers.

2.2 Create a Catalogue Collection

Prior to creating a Catalogue Collection you will need to determine whether or not the catalogue you are loading can belong to an existing Catalogue Collection. If so, it is unnecessary to create a new Collection.

Catalogue Collections group related catalogues into logical groups, which are then available for assignment to Business Rule Groups and then to Users. Collections are generally commodity or departmentally arranged (eg "Catering" or "Office Supplies"). Please refer to the PECOS P2P Administration Guide for further information on creating and managing Catalogue Collections.

2.3 Create Catalogue Key

Each Catalogue must have a Catalogue Key. The Key is associated to a supplier and it is used to load the catalogue. The Catalogue Key (i.e. the unique catalogue id) is assigned to a catalogue collection. Please refer to the PECOS P2P Administration Guide for further information on creating and managing Catalogue Keys.

3. Submitting a Catalogue

3.1 Submit to the Service Desk

Catalogues should be submitted directly to the Elcom Service Desk by a system administrator with the appropriate access permissions. Connect to the Service Desk at http://servicedesk.elcom.com and login using your credentials. Select 'Catalogues' > 'Upload Catalogue' and then select which system the catalogue is to be loaded (Test or Production). Please refer to the latest *Customer Support and Service Desk Guides* for additional information.

3.2 Submit by eMail

When submitting a catalogue to the Service Desk is not practicable, catalogues can be submitted by eMail. Completed catalogues should be attached, as a properly formatted **.csv file** to an eMail and sent to: ipm_catalogs@elcom.com.

All catalogues must comply with the catalogue structure and contain all mandatory fields. If they fail to do so they will fail to upload and will be returned.

The following details MUST be included in the eMail:

- The exact **Site Name** where the catalogue is to be loaded.
- The **Catalogue Key.**
- The **type of load**: Update (append existing data) or Reload (replace existing data).

3.3 Load Results

Elcom support will reply to the sender of the catalogue after the catalogue has been loaded and attach a summary of the load results. The summary will advise the total number of items in the load file, the number of updated, failed and rejected items and where appropriate, a log of errors will also be attached.

3.4 Duplicate items

Duplicate items are not allowed and it is recommended that the catalogue is checked. The following formula can be used in excel to undertake such a check:

=IF(COUNTIF(P1:P1,P1)>1,"Duplicate","Unique")

Insert a column after column P (Item /Sku) and drag the formula down the entire column. Remember to remove the column before submitting for loading.

3.5 PECOS Catalogue Manager

The PECOS Catalogue Manager (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 management solution for PECOS P2P, eliminating all of the problems experienced when integrating to external, third party solutions.

The current release of the PCM solution enables any PECOS P2P procurement organisation to search for existing catalogues, upload content for full validation of fields and formats and publish the catalogue directly to their PECOS instance. 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.

4. Catalogue Load Format

The required delimited format (comma or other) for the **loadcat** file can be easily generated from Microsoft Access or Excel or from a custom program. If the delimiter appears in a column value, it must be surrounded by double-quotes (",").

5. Field Definitions

The following section describes all available fields which may be used for PECOS P2P catalogue loads.

5.1 Definitions Table

Definitions for the Catalogue Load fields are provided in the table below. A brief description of the field is given, along with examples of how to complete it where appropriate.

Key:

Data Type = Indicates the type of data allowed for the field:

- Text: Numbers and letters allowed.
- Date: UK format = DD/MM/YYY; US format = MM/DD/YYY
- Decimal: Any number up to 4 decimal places.(Note that only 2 decimal place will display)
- Integer: Any whole number is allowed.

Data Length = The MAXIMUM length for the field including spaces.

Req = Field is required and therefore mandatory.

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Transaction Type	Text	1	Y		Please type either A, C, or D. A = Add an item (this is the code that you will use to upload or replace a new or existing catalogue or if you are adding an item to an existing catalogue) C = Change an item (this will replace an existing item in an existing catalogue) D = Delete an item (this will delete an existing item in an existing catalogue) Please use upper case text in this column. **Do not mix transaction types** in a file. Note: There are 2 ways to manage catalogue loads: 1) Reload (ie replace) and 2) Update (ie Append).
DUNS Number	Text	20	N		This field is available for the input of a unique supplier identification number. Enter the supplier Dun & Bradstreet Number if known or alternatively, a telephone number or VAT Registration Number.
Catalogue Key Name	Text	35	Y		The customer will provide the key name. Note that if the Supplier is a non-catalogue supplier the program will append '_N' to the Key Name. Should you enter exactly 35 characters, the Key Name will be truncated in order to accommodate the '_N' (eg ABC (Key word for ABC Computers).
Level 1 Segment Code	Integer	4	Y/N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below).
Level 1 Description	Text	30	Y/N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below).
Level 2 Segment Code	Integer	4	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 2 Description	Text	30	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Level 3 Segment Code	Integer	4	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 3 Description	Text	30	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 4 Segment Code	Integer	4	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 4 Description	Text	30	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 5 Segment Code	Integer	4	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
Level 5 Description	Text	30	N		Commodity Code as dictated by the customer. If a unique coding system is in use, please leave the 'UNSPSC Code' column blank. This is only required if UNSPSC Code is not provided (see below). This level to be provided only if the previous level is defined.
UNSPSC Code	Text	10	Y/N		All items in the catalogue must be coded with a product classification code. There are 3 ways of accomplishing this: 1) Enter the UNSPSC Code directly here (recommended); 2) Enter the UNSPSC code as individual segments in fields 1 to 4 above (the program will concatenate the codes and insert them as one string) or 3) If a custom classification is used, enter the codes in fields 1 to 5 above (the program will generate a unique number to identify the classification for the item). If a unique coding system is inserted into fields 1 to 5 above, please leave this field blank: enter either a bespoke code in the above fields or a UNSPSC code here, not both. For more information on the UNSPSC version used please refer to your administrator.

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Manufacturer	Text	30	N		Manufacturer Name.
Item Number/SKU	Text	50	Y		Item Number or SKU code. Must be a unique number.
Item Description	Text	255	Y		The item description. Please avoid using commas in the description (unless encased in speech marks).
List Price	Decimal	22	Y/N	Cust. Price	Please do not input a currency symbol in this column. It is assumed that this is a currency field. If this field is left blank the Customer Price will be defaulted into this column. (e.g. 13751.2121)
Customer Price	Decimal	22	Y/N	List Price	Please do not input a currency symbol in this column. It is assumed that this is a currency field. If the Customer Price is the same as the List Price, please re-key the List Price in this column. (e.g. 29611.2987)
Discount	Integer	12	N	Discount	Customer discount expressed as a percentage. Please do not use the % sign. For example, for a 10% discount, key in 10. (e.g. List Price = 2.99 and the Discount = 10) The Customer Price will be 2.6910. This is rounded to a precision of 2 when displayed.
Unit of Measure	Text	6	Y		Unit of Measure (Uppercase). PECOS supports either ANSI x12 or UNDP Rec20 units of measure. Note: only one UOM schema will be used. Please check with the P2P administrator.
Minimum Quantity	Decimal	12	N	0	Use this column if there is a Minimum Order Quantity that must be ordered for this item. This is validated by each PECOS requisition.
Page Number	Text	4	N		If the item corresponds to a page in a paper catalogue, the page number can be referenced here.
Start Date	Date	Date	N	Created Date	Please input the beginning date of the pricing contract. If blank, the start date will become the created date. The Date Format should be entered the same as the Supplier Locale. Example (18th March): 18/03/2010 (UK, EMEA) or 03/18/2010 (US only).

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
End Date	Date	Date	N		Please input the end date of the pricing contract. If the end date is unknown and left blank the system will apply 365 days to the Date Effective Start. If you wish to have the item activated indefinitely we recommend entering a date of 2030. Example (18th March): 18/03/2030 (UK, EMEA) or 03/18/2030 (US).
Item Substitute	Text	20	N		This item will replace the selected Item Number when the item is not available.
Manufacturer Number	Text	50	N		Enter a Manufacturer Part Number.
Image 1	Text	255	N		Maps to Media1 (name of primary image file: gif, jpg or png) If you have an image, please enter the file name or URL in this column. The file name must include the file extension (eg 2p39.jpg). Note: When submitting a CD containing images for loading onto your site, please ensure a help desk call (quoting the catalogue details) is logged with Elcom Support for tracking purposes.
Image 2	Text	255	N		For Future Use. Leave Blank.
Text1	Text	255	N		For Future Use. Leave Blank.
Maximum Quantity	Decimal	12	N	0	Use this column if there is a Maximum Order Quantity for this item. This is validated by each PECOS requisition.
Audio	Text	255	N		For Future Use. Leave Blank.
Video	Text	255	N		For Future Use. Leave Blank.
URL	Text	255	N		Maps to an item specification button on the item detail page for catalogue searches. Enter a URL for a web site page which contains additional information for this item. Must begin with http://
Item Type	Text	20	N	regular	Allowed items: 'regular' = catalogue (DEFAULT) 'config' = configuration 'consolidate' = consolidate 'ddoc' = dynamic document 'po' = punchout

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Receipt Required	Text	1	N	N	Define if a receipt is required. Valid Values = 'N' (no) or 'Y' (yes). Default = 'N'
Receipt Tolerance	Integer	12	N		Enter a percentage to define the receipting tolerance (for over receipting) at item level. Please do not use the % sign: for example a 5% tolerance should be entered as 5.
Tax Information	Text	255	N		Enter Tax Information to appear in the Item Detail Screen.
Item User Field Count	Integer	12	N	0	Enter the **number** of Catalogue Item User Fields for which data is to be provided in the catalogue file. Each subsequent pair of columns must contain the user field key (in the first column) and user field value (in the second column). Columns must be added to the template as required: If 0, add no additional columns; if 1, add 2 columns; if 2, add 4 columns; if 3, add 6 columns etc. Not all items have to contain a key and value for each item user field defined in the template. In the example here, it is assumed that two item user fields are provided *for at least one item* in the catalogue load. If this is not the case the next 4 rows are not required.
Item User Field 1 Key	Text	30	Y/N		Enter the field **Key** for the **first** catalogue item user field to be provided in the load file. The field Key will be provided by the customer: if the key is inserted into the template, the value for the item must also be defined; if no value is to be defined for an item, the key must be removed. The field may be configured as mandatory, in which case the subsequent value will also be mandatory.
Item User Field 1 Value	Text	255	Y/N		Enter a field **Value** for the **first** catalogue item user field to be provided in the load file. If no value is to be provided for an item, leave this field blank and ensure that no key has been inserted into the previous field. If the previous User Field Key is mandatory, the value is also mandatory.
Item User Field 2 Key	Text	30	Y/N		Enter the field **Key** for the **second** catalogue item user field to be provided in the load file. The field Key will be provided by the customer: if the key is inserted into the template, the value for the item must also be defined; if no value is to be defined for an item, the key must be removed. The field may be configured as mandatory, in which case the subsequent value will also be mandatory.
Item User Field 2 Value	Text	255	Y/N		Enter a field **Value** for the **second** catalogue item user field to be provided in the load file. If no value is to be provided for an item, leave this field blank and ensure that no key has been inserted into the previous field. If the previous User Field Key is mandatory, the value is also mandatory.

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Contract ID	Text	50	N		Enter a Contract Reference or Identification.
GTIN	Text	14	N		Enter a GTIN (Global Trade Identification Number) or an alternate secondary item number or sku code. Note that this field is not currently validated specifically for a GS1 GTIN key but may contain any alternative product ID.
GHS Hazard	Text	5	N		Enter a UN GHS Hazard code number (The United Nations Globally Harmonized System of Classification and Labelling of Chemicals): GHS01 - Explosive GHS02 - Flammable GHS03 - Oxidising GHS04 - Compressed Gas GHS05 - Corrosive GHS06 - Toxic GHS07 - Irritant GHS08 - Health Hazard GHS09 - Environmentally Damaging Note that this field is validated against the hazard numbers.
UN TGD Hazard Code	Text	20	N		Enter a UN TDG Hazard code (United Nations regulation of Transportation of Dangerous Goods) or equivalent. Note that this field is not validated specifically for UN codes but may contain an alternative local, regional or national hazard indicator.
Control Regulation	Text	50	N		Enter details of any control regulation that is required (for example under COSHH legislation) or risk assessment requirements (e.g. Yes / No).
Lead Time	Decimal	15	N		Enter a lead time in **days**.
Long Description	Text	500	N		Enter a long description.
Preferred Item	Integer	2	N		Enter a valid preferred item indicator value (1 to 10).

Field Name	Data Type	Data Length	Req.	Default if Blank	Description
Unit of Measure Quantity	Integer	20	N		Enter a Unit of Measure Quantity (UOMQ) to define the quantity of one unit of measure when the unit of measure is not 'Each' (also known as Unit of Purchase).
Unit of Measure Quantity Unit	Text	6	Y/N		Enter the Unit of Measure Quantity Unit (also known as the Unit of Purchase Unit) to define the unit of one unit of measure quantity (UOMQ) when a unit of measure quantity is defined. **Note that this is Mandatory if Unit of Measure Quantity (UOMQ) is provided.** PECOS supports either ANSI x12 or UNDP Rec20 units of measure - only one UOM schema will be used. Please check with the P2P administrator.

5.2   Item User Defined Fields

When using Catalogue Item User Defined Fields the following rules will apply:

- If a user defined field is created as **Mandatory** in PECOS P2P, the field will be treated as mandatory in the catalogue and therefore the bulk load. If the field is therefore omitted from the load file, the item will be rejected.

- If a user defined field is created as **Mandatory with a default** in PECOS P2P, the field will be treated as mandatory in the catalogue but may be omitted from the bulk load file. If the field is therefore omitted from the load file, the item will load and inherit the default value.

- If a user defined field is created as **Optional** in PECOS P2P, the field will only be populated if it is defined and included in the catalogue bulk load.

- If a user defined field is created as **Optional with a default** in PECOS P2P, the field will only be populated if it is defined and included in the catalogue bulk load and the value included in the bulk load will override the default value. Where an optional field is defined in the bulk load but left empty (key and value) the item will load and inherit the default value.

- If the item user defined field has been created as an **Order** type field in PECOS P2P (rather than a Catalogue or 'Both' type field) and is included in the catalogue template, all items containing this field will be rejected. This field type is illegal for catalogue loads.

- **Key** and **Value** must be provided in pairs for each item in the catalogue. Where User Defined fields are optional and a value is available, both the key and value must be defined. If no value is available for an item both the key and value fields must be left empty.

6.   Level 2 PunchOut

PECOS P2P fully supports 'Level 2 PunchOut' or 'Item Level PunchOut' for External Marketplace suppliers who are able to provide a catalogue in support of their PunchOut site. The principal benefit of Item Level PunchOut is that a user is able to search a PunchOut supplier catalogue alongside all other hosted catalogue content from the Item Search screen. The buyer is therefore able to see both catalogue and PunchOut items in search results for comparison and informed purchasing decision making.

Supplier Prerequisites

a) The supplier must have PunchOut capabilities.

b) The supplier must support edit/inspect

c) A catalogue must be provided using the standard template. All items must have the Item Type of 'punchout'.

Setup Requirements - New Supplier

1   Create supplier profile and set the supplier type as 'Catalogue'.
2   Create a Catalogue Key in the usual way and assign it to Collections in the normal way.
3   Add the supplier catalogue (i.e. Catalogue Key) to an index group. This is an Elcom Support task and only needs to be done once prior to the first time loading of the PunchOut catalogue.
4   Upload catalogue using the standard PECOS P2P catalogue upload template. All items must be specified with item type of 'po' (column AI in the template) – all of the mandatory fields must be filled out as normal.
5   Index catalogue. This is a standard Elcom support task which runs automatically.
6   Change supplier type in the supplier profile to 'External Marketplace with Non-Catalogue'. Ensure PunchOut parameters are configured and the 'Supplier Allows Inspect/Edit' option is selected.

Setup Requirements - Existing Supplier

1   Change the supplier type in the supplier's profile from 'External Marketplace' to 'Catalogue'.
2   Add the supplier catalogue (i.e. Catalogue Key) to an index group. This is an Elcom Support task and only needs to be done once prior to the first time loading of the PunchOut catalogue.
3   Upload catalogue using the standard PECOS P2P catalogue upload template. All items must be specified with item type of 'po' (column AI in the template) – all of the mandatory fields must be filled out as normal.
4   Index catalogue. This is a standard Elcom support task which runs automatically.
5   Change the supplier type in supplier profile back from 'Catalogue' to 'External Marketplace with Non-Catalogue'. Ensure Punch Out parameters are configured and the 'Supplier Allows Inspect/Edit' option is selected.

   Note: Steps 1, 3, 4, 5 must be repeated each time a subsequent catalogue is reloaded for the existing supplier.

7.   UNSPSC Classification

All catalogue items must be classified using a product classification code. The classification code used in PECOS P2P is the UNSPSC code version 8.1201.

Today's buyers and suppliers demand faster fulfilment at a lower cost. Increasingly business is eBusiness and the need to approach procurement more strategically has never been greater. All of these combine to make fast, simple, accurate classification of goods and services imperative in the marketplace. A single coding convention that all companies and organisations can draw from enables everyone to effectively 'speak the same language' in order to speed-up and rationalise procurement processes.

7.1   Advantages of UNSPSC

By embedding UNSPSC classification standards into management systems - purchase orders, invoices, electronic documents, product catalogues, websites - all parties throughout the extended supply chain benefit. Here are some examples:

- Procurement can keep an eye on how much is spent buying what. This information is readily available to analyse the specifics in the buying process at the level of detail that most suits the business needs in a timely and precise manner.

- Users can vastly reduce the time it takes to find and source products by searching by commodity code.

- Marketing is able to get field data fast for market research, product development, and sales analysis, ultimately delivering to the organisation's bottom line, via customer satisfaction.

- Sales can monitor sales channels and distribution all the way to the shop floor or end user. They can gather market intelligence quickly via electronic platforms for accurate sales analysis. They can extend the reach of their products to customers by publishing e-catalogues, registering with search engines or third-party market places.

7.2   Structure

The UNSPSC is a hierarchical classification with **five** levels. These levels allow analysis by drilling down or rolling up to analyse expenditures. Each level in the hierarchy has its own unique two digit number.

XX **Segment** The logical aggregation of families for analytical purposes.

XX **Family** A commonly recognised group of inter-related commodity categories.

XX **Class** A group of commodities sharing common characteristics.

XX **Commodity** A group of substitutable products or services.

XX **Business Function** The function performed by an organisation in support of the commodity.

7.3   Coding Rules

In situations where there are either many uses or many sources for the same commodity, the classification reflects the dominant use of the commodity within the global marketplace. Dominant use varies over time and by country or region. Although the first version of the UNSPSC was developed in the USA and Norway, the intent of the development team was to reflect International usage of a commodity and not regional or industry-based applications.

As a first rule, a product or service is classified with others that serve or support a common function, purpose or task. These segments, families and classes of commodities are normally found in the same district, store or aisle. As a second rule, a product is classified with others made by a similar process and often manufactured by the same or a similar company. Finally, if the first two rules do not apply, then the material from which the product is made will help determine its classification.

UNSPSC code is continually being updated to reflect the myriad products and services on the market. Active participation by companies and trade groups will help keep commodity items and categories current. The code's evolution will be based on its many users, as they request and approve code additions or deletions.

7.4   More Information

The full listing of version 8.1201 UNSPSC can be found through search and download from the UNSPSC UNDP web site: http://www.unspsc.org

8.   Catalogue Template

A catalogue template is provided in the form of an excel spreadsheet to assist with the creation of catalogue files. Use of this spreadsheet is not mandatory but does provide a structured template with column header comments and data examples to assist with the creation of accurate catalogues. Columns should not be added or removed unless adding Item User Fields (see section 5.2 above). Please save the template using a logical naming convention and create supplier specific copies as required.

Once completed, all header and example data must be deleted and the file saved as a .csv before being submitted for loading.

Validated Template

The Field Definition table above defines the data type and length for each catalogue field. Failure to adhere to these requirements will result in load failures and therefore an additional template with validations is available to assist customers and suppliers who experience difficulties creating valid files. Please speak to your Customer Support or Client Services representative if you would like a copy of this template.

Validation is based on Excel's simple Data Validation settings and is not macro based. Validations for a column, cell or range of cells may be removed if required by selecting: 'Data > Validation > Clear All' from the menu bar:
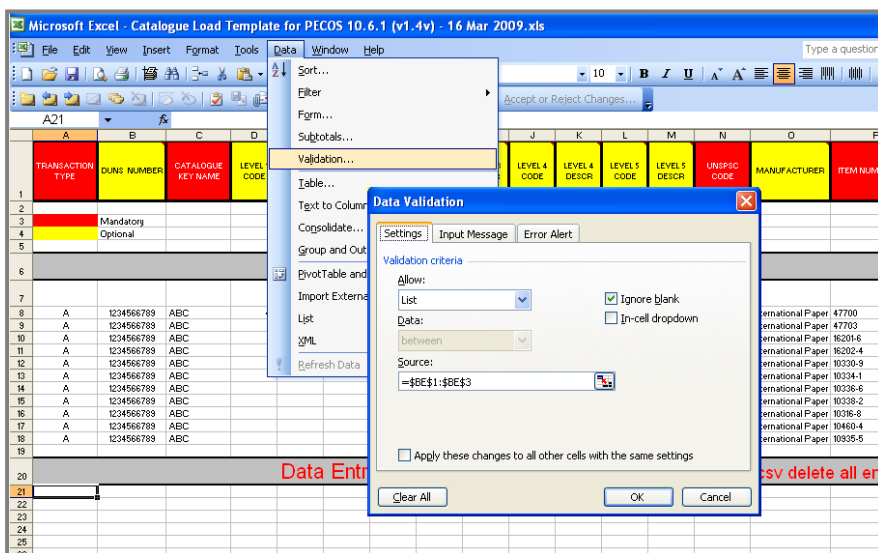
Please note that if copied data is pasted into Excel, validations will not work and will be automatically cleared.