Catalog Content Management

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1. Introduction

The Catalog Content Management Tool (short: “CCMT”) is designed to ease the supplier’s experience when uploading or updating a catalog. The tool gives an overview of all catalogs which are under the suppliers responsibility and/or have been requested by the customer. For using the CCMT there is no separate registration necessary - the user only needs his existing JAGGAER DIRECT login and password.

1.1 Network requirements

The following network requirements have to be fulfilled (valid for all versions from 1.6):

- HTTPS (Port 443) to www.pool4tool.com (i.e. respective JAGGAER DIRECT system you are using and which was entered in “Settings” as the “Access URL”)
- SMTP on Port 587 to smtp.sendgrid.net (CCMT also works in case SMTP is not available, but no support e-mails can be sent then)

In case you want to use a WebProxy:

- HTTPS to your WebProxy for the selected port (Settings → Proxy → URL, Port)
- HTTPS (Port 443) from your WebProxy to www.pool4tool.com (i.e. the respective JAGGAER DIRECT system you are using and which was entered in “Settings” for “Access URL”)
- The WebProxy has to support HTTPS
2. Catalog Management Process

2.1 Catalog Invitation

If a buyer requests a new catalog/a new catalog version, the user receives a notification per email, which contains the following information:

- Name of the customer
- Name of the catalog
- Validation rules (see below 2.4.2)
- Link for the application download

Example:

---

Dear madam or sir,

Please provide the following catalog Kopierpapier.
The following fields are being listed as mandatory and include validation rules that are going to be checked when uploading the catalog:

<table>
<thead>
<tr>
<th>Field name</th>
<th>Validations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artikel nummer</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Kurzbeschreibung</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Beschreibung</td>
<td>mandatory true</td>
</tr>
<tr>
<td>eClass</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Order unit</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Anzahl Inhaltsseinheit der Bestell einheit</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Preis</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Netto</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Währung</td>
<td>mandatory true</td>
</tr>
<tr>
<td>Steuersatz</td>
<td>mandatory true</td>
</tr>
</tbody>
</table>

Please use the following link to download the Catalog Content Management application:


Thank you for your cooperation.

Best regards,
Paul Mörtscheler

This is an automatically generated email. Please do not reply.
2.2 Starting the application

Initially, the user has to download the application from https://www.pool4tool.com/ccmt/en.html. The application is packed in a .zip file which contains several files and folders. All files and sub-folders need to be unzipped and saved in a folder on your local hard-disk.

Please note: the „CCMT.exe“ needs to be started from the folder where it has been saved to - it is not possible to run the executable directly from the .zip file.

When the program is started, the user gets the following screen in which the JAGGAER DIRECT Username and Password must be entered:

The login information is the same as for the JAGGAER DIRECT supplier portal. There is a “remember me“ checkbox available, so that the user can save the user name and password for the next session.
2.2.1 Settings

After pressing the Settings button, a dialog opens where you can set the JAGGAER DIRECT system you like to work with and where you can configure the usage of a WebProxy.

Server:
- Access URL: URL of the JAGGAER DIRECT system you like to use. You can use this to access an inhouse or test system. In case the standard hosted JAGGAER DIRECT system is to be used, please enter “https://app.pool4tool.com/” as Access URL.
- Skip SSL Check: when checked, all certificate errors are being ignored

Proxy:
In case you like to use a WebProxy this can be set up here. In case the URL field is empty, no WebProxy will be used.
- URL: URL of the WebProxy, as IP address (e.g. 192.168.0.99) or host name (e.g. webproxy1.intern). No protocol prefix (e.g. https:// etc.) must be used.
- Port: Port of the WebProxy (e.g. 8080)
- User: Username to be used for accessing the WebProxy (can be empty in case the WebProxy doesn’t require a username/password)
- Password: Password to be used for the WebProxy (can be empty in case the WebProxy doesn’t require a username/password)
- Reset to Default: Removes the WebProxy configuration data

By pressing the OK button data will be saved.
2.3 Main page

After the user logged into the tool, the home screen of the application opens.

![Home Screen](image)

After the first login the selected language corresponds to the user default language set in JAGGAER DIRECT. The language can be changed at any time using “Settings”.

In the upper part of the page there are five buttons:

- Home: back to home screen
- Settings: language settings, refresh catalog list
- Log out: log out from application
- Excel: download the Excel template for catalog import
- i (Info button): opens tool documentation in new browser window

On the home screen the user can see all catalogs which have been requested by customers, as well as:
A catalog can have the following status:

- Empty: catalog is being requested for the first time
- Update: catalog was already uploaded and an updated version is requested
- Importing: catalog is being imported in tool
- Imported with errors: catalog was imported and errors were detected
- Imported with no errors: catalog was imported without errors
- Upload in progress: catalog is being uploaded to the application
- Approval in progress: catalog is currently being transferred to JAGGAER DIRECT
- Waiting for approval: catalog is in the staging area of the customer. As long as a catalog was not approved by the customer, the status stays as “Waiting for approval” and the supplier cannot upload a new catalog version.
- Approved: catalog was approved, the supplier can upload a new version
- Declined: catalog was declined, the supplier can upload a new version

The user can edit a catalog by using the pencil icon in the menu column. First the user sees the import area where the format of the catalog needs to be selected.

Depending on the selected format, the import of the catalog is subdivided into three (Excel) or two (BMECat) steps.

2.4 Step 1 - Select file(s)

2.4.1 Select catalog/pictures

The upload of catalog and pictures is done separately.

Depending on the format of the catalog file, the appropriate format needs to be selected from the dropdown menu - BMECat or Excel (BMECat 1.2 and 2005, xls and xlsx are supported). Afterwards the catalog file needs to be selected.
In case pictures/data sheets should be uploaded as well, the user can select a (picture) folder or a zip file next to “picture location” (Please note: only.zip format is supported. The following picture formats are supported: *.tif, *.jpeg, *.jpg, *.png.

If the selected catalog format is Excel, the Excel file has to have a column which contains the picture/data sheet file name. The system is now automatically mapping items with the corresponding picture/data sheet.
2.4.2 Validation rules

The buyer can define specific rules for the import which have to by applied in order to import a catalog. Example: which formats have to be respected, in which currency the catalog needs to be provided, etc.

These validation criteria are listed in the first step, as well as in the notificator, to make it clear for the user which rules need to be taken into account.

The compliance of the validation rules are checked by the system during the catalog import. In case the imported file does not follow the rules, the system shows an error for all failing items and the data cannot be imported, until the errors are corrected (e.g., buyer asks for eClass version 5.1 but the catalog has only version 4.1.).
As soon as the users selected all necessary files, it is possible to go to the next step. When choosing Excel as a format, the user needs to click on “Step 2: Excel Mapping”.

For format BMECat there is no Excel Mapping required, therefore the user goes directly to „Step 3: Import“.

### 2.5 Step 2 - Excel Mapping

The second step is only available if the chosen format is Excel. This step is used for mapping the columns from the file with the fields of the JAGGAER DIRECT database. Each title of the column listed in excel is displayed on the left side whereas the destination columns need to be selected from the dropdown list (second column) where the values are alphabetically sorted. The last column is showing the example of the value collected from the first row in excel, so that the user can be sure if the value is going to be correctly mapped.
This mapping needs to be done only once per catalog - if the user uploads a catalog which was already uploaded all fields will have the preselected value. This way a user will not have to map the fields each time when uploading the same catalog. However, a change of the preselected values is possible.

The following fields are available:

- Article name
- Buyer article number
- Buyer material group
- Category - if there is more than one (sub)category in the catalog, select “category” for each category
- Content unit
- Currency
- Data sheet - data sheets are imported like pictures
- Delivery time
- eClass
- European article number
- Feature name - for features, field name
- Feature value - for features, field value
- International article ID
- Long description
- Manufacturer article number
- Minimum order quantity
- Name of manufacturer
- Normal picture – please select for pictures
- Number of content unit per order unit
- Order unit
- Price
- Price quantity
- Quantity interval
- Scale price
- Scale quantity
- Short description
- Special treatment type – for special treatments, field type
- Special treatment value – for special treatments, field name
- Supplier article number – Please note: a supplier article number must be provided and mapped, otherwise the catalog cannot be imported
- Synonyms and keywords
- UNSPSC
- Value added tax

Once all fields are mapped, the user can move to “Step 3 - Import”.

2.6 Step 3 - Import

In the third step all data (catalog data as well as pictures) are finally checked and uploaded - it is the same for Excel and BMECat. Clicking on “Validate & Import” starts the importing process.

If the user did not select any picture(s), a warning message will be displayed:
This message should make the user aware of the fact that after confirming the import, images can only be added per item, which could be extremely exhausting (especially if a catalog has more than 100 articles).

After confirming the import process starts. In case the user clicks on “no”, the respective picture location should be selected and then the import begins.

A progress bar on the upper left side of the page shows the import progress as well as the needed time.

In case errors occur during the import, those errors are listed on the bottom of the page (in real time).

CCMT distinguishes two different error types:

**Error**: a mandatory field has no entry. The user cannot import the catalog until the mandatory field has a value.

**Warnings**: no pictures have been uploaded. This is just a hint which has no effect on the import

The status bar shows how many errors and warnings were detected, but the table shows only the first 1000 errors. The column “Status” shows, whether there is an error, a warning or both for this item. The list can be sorted by error type. By using „Export report” the list of all errors can be downloaded.

In order to correct errors/warning, the user has two possibilities:

- Correcting the error directly in his file and uploading the corrected version
Correcting directly in the tool item by item

To correct errors in the tool, the user just needs to double click on the error message. The item details will open and corrections can be done wherever needed.

As soon as the missing entry is added and saved, the error message disappears from the list.

Once all errors are corrected, the user can click on „catalog details“.

2.7 Catalog details - Overview

In the catalog details the user can see the whole catalog including the catalog structure. In this step the user can make some last changes, before the catalog is finally uploaded.
The left side shows the catalog structure. Next to it on the right all catalog items are displayed. By using the icons in the menu column the user can check, edit or delete the items.

By using the folder icon, the user can see the item details:
By using the pencil icon, the user can edit the item details:
By using the “X” icon, single items can be deleted:

To delete more than one item at a time, the user needs to select the checkbox of the items and click on the “Delete” button.

To mass edit items, the user needs to select the items and click on “Mass edit”.

2.8 Catalog Upload

Once all changes are done, the catalog can finally be uploaded.

As last step, the user needs to click on „Upload“, whereas the user will be routed back to the home screen.
Now the catalog upload process is finished. The application is now sending all the data to JAGGAER DIRECT and the status of the catalog changes. Once the catalog data arrived on the JAGGAER DIRECT server, the catalog will get the status “insync” and is visible for the buyer. Please note that this can take (a lot of) time, depending on the size of the catalog.

The import can be stopped by clicking on „cancel“. The user can start again via the home screen.
2.9 Online and offline modus
The Catalog Content Management Tool works online as well as offline. But to upload a catalog the tool must be connected to the internet (the import of the catalog works in offline mode). In case the user loses the internet connection during a catalog import, the data won’t be lost but saved. If the internet connection gets lost during the data upload to the JAGGAER DIRECT server, the upload automatically starts as soon as the connection is back.

2.10 Sending error reports
In case the SMTP related network requirements (see 1.1) are met, you can send an error report to our support – please do so when being asked. To do this, right click with your mouse on the JAGGAER DIRECT logo and select “Send Error Report”.

In case the resulting dialog box says “Mail is sent successfully” this worked.
3. Settings

3.1 Language
To change the Language, go to Settings → Language and choose your desired language.

3.2 Check for Updates
Select Settings → Check for Updates to check if an optional or mandatory update is available. If, it will be shown to you. Please follow the steps shown to proceed with the update.

3.3 Resetting the local database
In case you have problems with the local database used by CCMT, or in case our Support ask you to do this, you can reset the local database. When doing this, CCMT will be restarted with a clean and empty copy of the local database. You can start this by choosing Settings → Reset Local Database.
4. Updating CCMT

Updating CCMT to a newer version is an automated process where CCMT checks on start-up if an update is available and if so, will either start the automatic update process (in case of a mandatory update) or show a message that an optional update is available. Please click OK to proceed with a mandatory update and leave CCMT running until the update is finished and re-started.

In case of an optional update, this will be displayed in the status bar after start-up. To execute an optional update, choose Settings → Check for Updates and select Yes to proceed with the update.

4.1 Updating from version 1.6 (or older)

An automatic update from version 1.6 or older is not possible, and if started it will fail. Please download the latest version of CCMT and replace your existing version in this case.
5. Release Notes

5.1 Version 2.7.12.21
- Fixed issue with update window shown twice (#IN025437)
- Fixed several issues with missing checks in case of mandatory fields (#IN028172, #IN029460)
- Improved handling of scaled prices (#ZEN-40575)
- Fixed problems with automatic update procedure (#IN028797)
- Fixed problems with validation rules not being displayed (#IN029461)
- Improved selection and persistence of language settings (#IN028936)

5.2 Version 3.18.6.8
- Enhanced support e-mail, now also sending the catalog_ext.log file
- Fixed bug where dialog appeared twice in update process
- Change in version numbers to show two digits for the year (“3.18.6.8.”)
- Fixed bugs on catalog upload (#IN029898, #IN029952, #IN030330)
- Improved German and English text/translations
- Added check for scaled price and scaled quantity (#IN030593)
- Added automatic replacement of corrupt local database file with a clean and empty database. Possibility to initiate this manually as well (#ZEN-47755)
- Enhanced logging (#ZEN-47756)
- Changed branding to JAGGAER Direct (#ZEN-47759, #ZEN-47760)

5.1 Version 4.18.8.29
- New field „Article type“ with the values ‘Material’ and ‘Service’ (#ZEN-48157)
- New validation rule which checks if all currency fields have the same currency as the catalog (#ZEN-47226)
- New feature added which allows validation rules checking a data field against a table-designer table in the backend (#ZEN-49273)

5.2 Version 5.19.4.11
- The number of parallel threads used when uploading data to any other system than www.pool4tool.com and app.pool4tool.com has been reduced to 4.
- The warning messages about unknown or missing article types have been removed
- New language: Polish