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Catalog administration guide for buyers

SAP Ariba Procurement solutions

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Topics about catalog manager interface

Catalog Manager workspace in SAP Ariba Procurement solutions

The **Catalog Manager** workspace in Ariba Administrator provides access to tasks for managing catalogs in SAP Ariba Procurement solutions.

Workspace Task	Specific Tasks	For More Information
Catalogs	Import, export, edit, and delete catalog files.	About Importing Catalogs [page 15] About Managing Catalogs [page 90]
Catalog Kits	Create, edit, and delete catalog kits.	About Displaying Kits [page 69]
Catalog Validation Rules	<ul style="list-style-type: none">View the list of global and supplier specific validation rules for catalog fields.Edit the existing rules or create new supplier-specific rules.	About Validation Rules [page 25]
Catalog Views	Create catalog views based on user permissions.	How to create catalog views [page 56]
Hierarchy Editor	Create, edit, and delete catalog hierarchies.	About the Catalog Hierarchy [page 46]
Relevance Ranking Designation	View and change the relevance ranking attributes and their order.	Setting Relevance Ranking [page 147]
Index Builder	Rebuild catalog indexes to publish content changes.	How to rebuild a catalog index [page 155]
Generated Subscriptions	View subscriptions generated for non-catalog and category-defined items.	How to view generated subscriptions [page 154]
Currency Map	Manage existing currency mappings or create new mappings.	About Currency Mappings [page 99]
Units of Measure Map	Manage existing Units of Measure mappings or create new mappings.	How to edit a unit of measure map [page 98]
Scheduled Tasks	Run and view the status of catalog related scheduled tasks	Scheduled Tasks [page 156]
Data Import/Export	Import and export catalog-related data. View details, errors, and the history of past data imports and exports.	How to run data import tasks [page 162]
Parameters	View catalog-related parameters and edit the values.	Parameters [page 159]
Type Definitions	Import, export, edit, delete, enable, and activate parametric types and supplemental attributes	Only Ariba Customer Support has access to the Type Definitions workspace.

Users belonging to the **Customer Catalog Manager** group can access all the tasks in the **Catalog Manager** workspace except the **Type Definitions** task.

Catalog Content Manager workspace

In sites enabled for managing catalogs using the content management system (CMS), an additional **Catalog Content Manager** workspace is displayed for managing catalogs. For more information see [Catalog Content Manager workspace \[page 103\]](#).

For more information about the content management system (CMS), see [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#).

Related Information

[How to open the Catalog Manager \[page 8\]](#)

[Administering catalogs \[page 8\]](#)

How to open the Catalog Manager

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Click **Catalog Manager**.
3. Click a link to open the related task.

Administering catalogs

In SAP Ariba Procurement solutions catalogs are administered by a customer users who belongs to the **Customer Catalog Manager** group. They can also be administered on behalf of customers by the Ariba catalog management team.

Catalog administration generally occurs in the following sequence:

1. Importing and validating catalogs.
For more information, see:
 - [About Importing Catalogs \[page 15\]](#)
 - [About Validating Catalog Data \[page 22\]](#)
 - [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#)
2. Analyzing, approving, and activating catalogs.
For more information, see [About Activating Catalog Items \[page 39\]](#).
3. Determining how catalog items are viewed by users.
For more information, see [Displaying Catalog Items to Users \[page 44\]](#).
4. Editing, deactivating, revalidating catalogs.
For more information, see [About Managing Catalogs \[page 90\]](#).

5. Determining how users search for items in catalogs.
For more information, see [Configuring Catalog Search \[page 145\]](#).
6. Performing additional tasks to manage catalog data.
For more information, see [Additional Ariba Administrator Tasks \[page 154\]](#).

Topics about importing catalogs

[Overview of importing catalogs \[page 10\]](#)

SAP Ariba Procurement solutions support catalog files in Catalog Interchange Format (CIF), commerce XML (cXML) format, Bundesverband Materialwirtschaft, Einkauf und Logistik e. V. catalog XML (BMEcat) format, and Microsoft Excel format.

[Incremental and multi-supplier CIF catalogs \[page 13\]](#)

When you import a catalog, you can load the entire file, reload new or changed items, or import a CIF catalog.

[Obtaining catalogs \[page 13\]](#)

There are three ways to obtain catalogs: Ariba Network subscriptions, local subscriptions, and contracts.

[Importing catalogs \[page 15\]](#)

When you subscribe to catalogs on Ariba Network, the catalogs are typically imported automatically. When you use local subscriptions, you need to import those catalogs manually.

[How to import supplier logos \[page 21\]](#)

You can import supplier logos to be displayed against each supplier on the **Catalog Home** page.

Overview of importing catalogs

SAP Ariba Procurement solutions support catalog files in Catalog Interchange Format (CIF), commerce XML (cXML) format, Bundesverband Materialwirtschaft, Einkauf und Logistik e. V. catalog XML (BMEcat) format, and Microsoft Excel format.

BMEcat and Excel catalogs are supported only in sites enabled for managing catalogs using the content management system (CMS). For complete information on catalog files and formats, see the *Catalog format reference* guide.

You obtain supplier catalogs from Ariba Network or another source and import them into your procurement solution from SAP Ariba.

You can also allow users to go directly to a supplier's site to select items, a process called punching out, or PunchOut. In this case, you still import some basic catalog information from the supplier.

You can also create an empty catalog subscription and add catalog items to it manually.

In general, to import a catalog and activate it so users can see its items, you take the following steps:

1. Prepare for import. In preparation for importing a catalog, you take one or more of the following steps. These steps require coordination with the supplier, but typically you only do these the first time you import a catalog. When you import updates to this a catalog, you skip to step 2.
 - **Add the supplier.** Pull the supplier data from an ERP or from the supplier's profile on Ariba Network. This method is preferable, and it is recommended that you always use the same method of adding suppliers to ensure that supplier data is properly synchronized.

i Note

You can add the supplier manually using the **Supplier Manager** workspace. If you choose this method, you create the common supplier first and then add the supplier to it.

- **Configure commodity maps.** Ensure that the domain-specific commodity codes used in the catalog are mapped to commodity codes in your configuration.
- **Import unit of measure and currency maps.** Set up units-of-measure mappings and currency mappings as needed and import them.
- **Add type definition.** Add parametric and supplemental attribute type definitions to your configuration to match those in the catalogs, and then load the definitions.

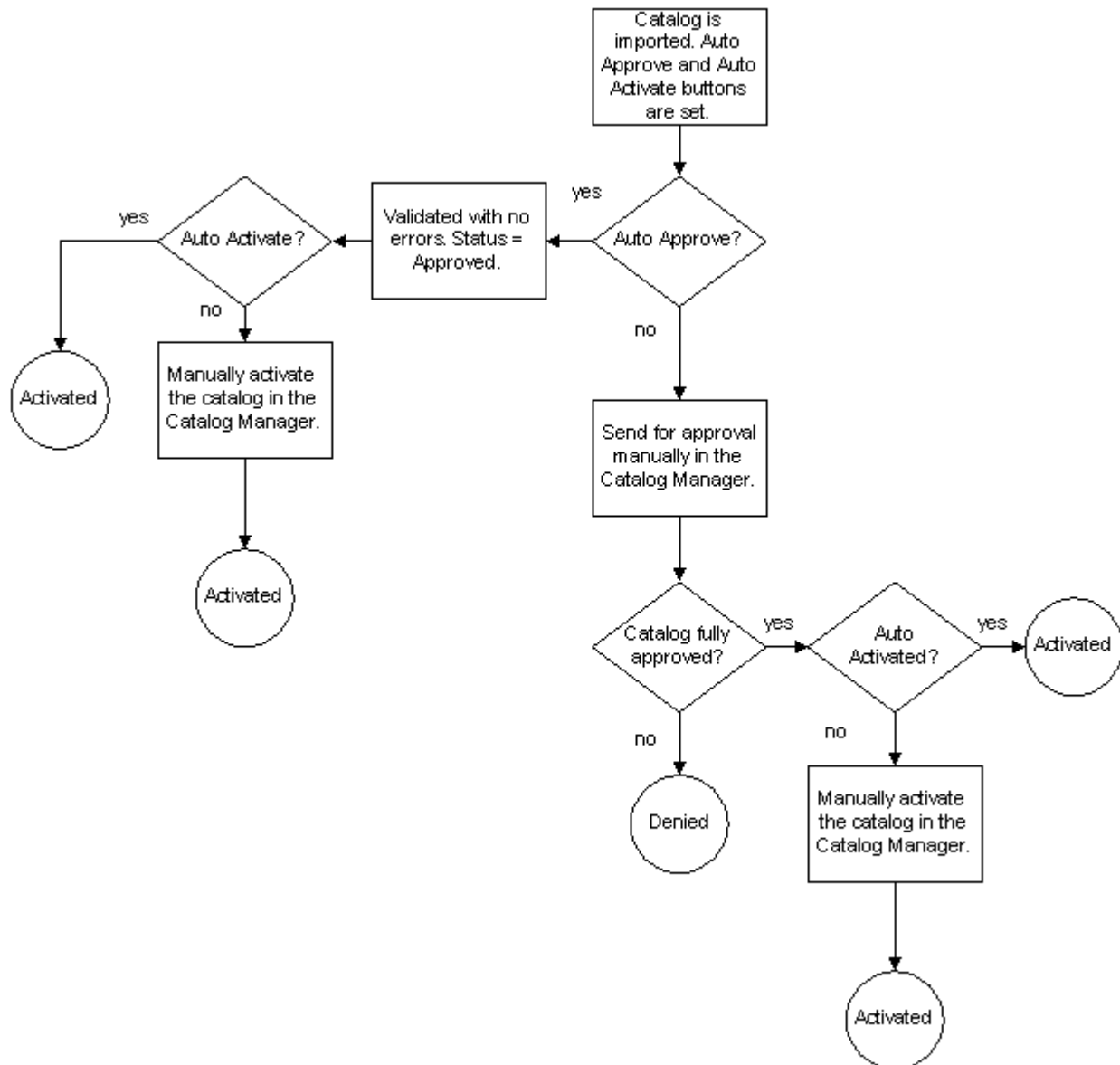
i Note

Contact your SAP Ariba Catalog Expert or SAP Ariba Customer Support for help in adding commodity codes and type definitions.

For more information on adding suppliers and units of measure in SAP Ariba Procurement solutions, see the *Common data import and administration guide*.

2. Import the catalog. You subscribe to the catalog on Ariba Network, or you receive the catalog directly from the supplier, such as on disk or CD. If you subscribed to a catalog on Ariba Network, it is imported automatically when the **Ariba Network Full Subscription Synchronization** scheduled task runs. If you received a catalog directly from the supplier, you import it manually, setting up a new subscription in the process or updating the catalog in an existing subscription.

The following diagram outlines the import, approval, validation, and activation processes.



In sites enabled for managing catalogs using the content management system (CMS), catalog validation occurs within the CMS.

For information about the workflow of catalog management processes using CMS, see [Workflow of managing catalogs using CMS \[page 101\]](#).

Incremental and multi-supplier CIF catalogs

When you import a catalog, you can load the entire file, reload new or changed items, or import a CIF catalog.

Incremental catalogs

When you import a catalog file, you can load the entire file, or just reload items that are new or have been changed. Loading all items is called full loading; loading only new or changed items is called incremental loading.

Incremental loading is potentially faster than full loading. Some parts of the process differ for full loads and incremental loads. The differences are noted in this document with the catalog processes. For specific information about incremental catalogs, see the *Catalog format reference*.

Multi-supplier CIF catalogs

A multi-supplier CIF catalog is a catalog file in CIF format that contains items from multiple suppliers. SAP Ariba Procurement solutions support the use of multi-supplier catalogs through manual import or via an Ariba Network catalog subscription.

Manually imported local catalogs can contain multiple suppliers if you set the catalog import option for allowing multi-supplier CIF.

Related Information

[Obtaining catalogs \[page 13\]](#)

[Importing catalogs \[page 15\]](#)

Obtaining catalogs

There are three ways to obtain catalogs: Ariba Network subscriptions, local subscriptions, and contracts.

- **Ariba Network subscriptions:** You can subscribe to catalogs on Ariba Network, and automatically download and import updates to those catalogs whenever the suppliers post updates. You can also receive e-mail notification of an updated catalog, and then download it manually from Ariba Network.
- **Local subscriptions:** You can obtain catalogs directly from a supplier, such as on disk or CD.
A local subscription is an import of a catalog retrieved directly from a supplier. Typically, you obtain the file on disk, CD, through e-mail, or by downloading it from a website, and then copying it to your computer.
With a local subscription, you can't schedule your SAP Ariba solution to download the updated catalog regularly.

- **Contracts:** If you are using Contract Compliance in your configuration, you can configure it to generate subscriptions for non-catalog items on contracts.
For more information on contract subscriptions, see the *Managing contract compliance*.

Typically, you create a combination of these subscription types depending on the catalog supplier and your configuration. Note that you can only obtain BMEcat catalogs as local subscriptions.

For information on contracts as they relate to SAP Ariba Procurement solutions, see the *Catalog user guide*.

Related Information

[How to set up Ariba Network subscriptions \[page 14\]](#)

How to set up Ariba Network subscriptions

Subscribing to catalogs on Ariba Network involves some initial setup in Ariba Network and in Ariba Administrator, but thereafter the process of obtaining catalogs is automatic.

Procedure

1. If you have not already done so, set up connectivity between your procurement solution from SAP Ariba and Ariba Network.

For more information, see *Common data import and administration guide*.

2. Log on to Ariba Network and subscribe to the catalogs you want to import on a regular schedule.

For instructions on setting up catalog subscriptions on Ariba Network, see the Ariba Network product documentation.

You are now ready to import the catalogs.

Related Information

[Importing catalogs \[page 15\]](#)

Importing catalogs

When you subscribe to catalogs on Ariba Network, the catalogs are typically imported automatically. When you use local subscriptions, you need to import those catalogs manually.

i Note

Try to import catalogs when fewer users are logged in to the system. If you update a catalog while a user has a requisition open, the requisition is not updated and could contain old items and prices when it is submitted.

If a catalog import fails, a notification email is sent to users who are members of the **Customer Catalog Manager** group. The notification indicates the subscription name, supplier name, and number of errors.

Importing Ariba Network catalogs

After you subscribe to a catalog on Ariba Network, you use the **Ariba Network Full Subscription Synchronization** scheduled task to synchronize with Ariba Network.

This process downloads, imports, and validates the new and updated catalogs to which you have subscribed.

Catalogs without errors are validated and are moved to the **Verified** status. As a member of the **Customer Catalog Manager** group, you send the verified catalogs for approval manually by clicking **Send for Approval**. On approval (by members of the **Catalog Approvers** group), the catalog is activated automatically.

After you have imported a catalog from Ariba Network, you can change the subscription options for skipping approval, for stopping before sending to approval, or activate automatically for all subsequent versions.

i Note

The first version of the catalog has to be sent for approval manually.

In the default configuration, the **Ariba Network Full Subscription Synchronization** scheduled task is set up to be run manually from Ariba Administrator. You can also set up the task to be run automatically at a specified time interval in hours in a given day.

During the **Ariba Network Full Subscription Synchronization** scheduled task, the system attempts to match a catalog subscription to a supplier as follows:

- Supplier information on the Ariba Network is matched to the NetworkID-Domain/Value information for the supplier organization (common supplier) in your system. After the initial match, catalog subscription updates use the NetworkID-Domain/Value.
- If no match is found, the subscription is not validated, and a **Catalog Import Failed** notification is sent to members of the **Customer Catalog Manager** group.
- The error associated with a failed match indicates an unspecified supplier. The error persists until you delete the subscription. You cannot reassign the subscription to another supplier or link it to an existing subscription.
- If a supplier uses a different subscription name than the one used previously, a new subscription is created, and data in the **Catalog Update Request** report is unreliable.
- If catalogs are imported from supplier location accounts associated with a supplier and supplier organization, the ANID of the supplier organization was used to validate the subscriptions.

In suite-integrated sites where SAP Ariba Procurement solutions are integrated with SAP Ariba Strategic Sourcing solutions for real-time synchronization of supplier data, if catalogs are imported from supplier location accounts associated with a supplier and supplier organization:

- the ANID of the supplier organization was used to validate the subscriptions
- the associated supplier location to supplier organization mapping information is retained in SAP Ariba Procurement solutions.

This ensures that all catalogs from different supplier subsidiary accounts are associated under the mapped supplier organization. It also ensures that users attempting to buy punchout items are directed to the correct punchout site

When importing supplier-related information in suite-integrated sites, SAP Ariba recommends the following:

- If all the supplier locations associated with the same supplier have the same Ariba Network ID, then specify the ANID for the supplier organization only.
- If all the supplier locations associated with the same supplier have unique Ariba Network IDs, then do not specify the ANID for the supplier organization.

Synchronizing incremental catalog subscriptions from Ariba Network

In the default configuration, the **Ariba Network Full Subscription Synchronization** scheduled task picks up only the latest versions of the catalogs uploaded on Ariba Network since the last run of the task. So, if multiple versions of a catalog (incremental or full) are uploaded between two consecutive runs of the task, only the data associated with the latest version is synchronized.

Your site can be configured so that the **Ariba Network Full Subscription Synchronization** scheduled task picks up all the versions published on Ariba Network since the last run of the task. If the latest catalog version is a full load, then the previous incremental versions are ignored by the task.

To use this feature, the `Application.Catalog.EnableANIncrementalSubscriptionSync` site configuration parameter must be enabled for your site. SAP Ariba sets this parameter for you. This feature is also applicable to sites enabled for managing catalogs using the content management system (CMS).

Related Information

[How to import local catalogs \[page 18\]](#)

How to manually synchronize in SAP Ariba Procurement solutions

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Select **Catalog Manager** > **Scheduled Tasks**.
3. Click **Run** for the **Ariba Network Full Subscription Synchronization** task.

Related Information

[How to synchronize catalogs per subscription \[page 17\]](#)

[How to import local catalogs \[page 18\]](#)

[How to import supplier logos \[page 21\]](#)

How to synchronize catalogs per subscription

The **Ariba Network Full Subscription Synchronization** scheduled task synchronizes the catalog data for all the available catalog subscriptions together. You can also choose to synchronize the catalog data per subscription.

Context

For example, if a supplier updates a catalog on Ariba Network, a member of the **Customer Catalog Manager** group can import the catalog to the SAP Ariba solution without having to run the **Ariba Network Full Subscription Synchronization** scheduled task or waiting for the task to run if it is configured to run automatically.

i Note

You can only synchronize catalogs that have been downloaded from Ariba Network.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Click a catalog subscription that you want to synchronize.
4. Click **Catalog Sync**.

The **Catalog Sync** button is enabled only if the **Ariba Network Full Subscription Synchronization** task has been run at least once either automatically or manually.

The **Ariba Network Subscription Sync Results** page displays the progress of the catalog sync. After the catalog synchronization is complete one of the following messages is displayed in the **Ariba Network Subscription Sync Results** page:

- Catalog synchronization is successful.
- No changes in subscription to synchronize.
- Ariba Network subscription for the catalog has been deleted. No new versions will be fetched.

i Note

You can also synchronize a catalog subscription from the **Catalog - View Errors -version** page by clicking the **Synchronize and Download Catalog from AN** icon.

Next Steps

If your Ariba Network catalog does not synchronize, check the following:

- Ensure that there is a relationship between your organization and the supplier on Ariba Network.
- Verify that catalog is published to your organization.
- Contact SAP Ariba Customer Support to verify that the Ariba Network ID and shared secret is correct.

Related Information

[How to import local catalogs \[page 18\]](#)

[How to import supplier logos \[page 21\]](#)

How to import local catalogs

If the catalog is a local subscription, you must import it manually. Before importing a catalog, ensure that a common supplier is defined for the supplier. If not, on import a warning is issued because the catalog's supplier organization ID does not match the common supplier you selected.

Prerequisites

If you plan to use BMEcat or Excel formatted catalogs, your site must be enabled for managing catalogs using the content management system (CMS). You will see the **File Format** pull-down menu only if CMS is enabled for your site.

Procedure

1. On the dashboard, click **Manage > Core Administration**.
2. Select **Catalog Manager > Catalogs**.
3. Click **Import New Catalog**.
4. Select your import options per the following table.

Options	Description
Select	Specify whether this is a new subscription or an updated catalog for an existing subscription.

Options	Description
Supplier	<p>Specify the supplier of the catalog.</p> <p>If you are importing a catalog containing partial items and you want users to specify the supplier name when ordering the items, select Unspecified for this option.</p>
Catalog Subscription Name	<p>Enter a descriptive name if this is a new subscription.</p> <p>If you are updating the catalog for an existing subscription, select the subscription name from the pull-down menu.</p> <p>Subscriptions using the same common supplier cannot have the same subscription name.</p>
Create an empty catalog	<p>Click Yes to create an empty catalog to which you can manually add items later.</p> <p>Click No if you do not want an empty catalog. Always select No when importing a BMEcat catalog, since you cannot manually add items to empty BMEcat catalogs after import.</p> <p>The following approval and activation options are not available when you choose Yes for this option. You must activate the catalog manually (and optionally, send it for approval) after you have added the items.</p> <p>This option is not available if you are importing a new catalog associated with an existing subscription.</p>
Skip Approval	<p>Click Yes to skip approval.</p> <p>Click No to require that the catalog be approved by the catalog approver before it can be activated.</p>
Stop Before Sending to Approval	<p>This option is displayed if you set the previous option to No.</p> <p>Click Yes to prevent the catalog from being sent for approval automatically so that you have a chance to verify it first.</p> <p>Click No to send it for approval automatically after it validates.</p>
Activate Automatically	<p>Click Yes to activate this catalog automatically if it contains no errors and is approved.</p> <p>Click No to require manual activation of the catalog.</p>
Allow Multi-Supplier CIF	<p>Click Yes if you are importing a CIF catalog that contains multiple suppliers.</p> <p>Click No if the catalog file contains only one supplier ID.</p> <p>This setting does not apply to BMEcat catalogs.</p>
Hide PunchOut Item Prices	<p>Click Yes to hide the PunchOut item prices.</p> <p>Click No if you want the PunchOut item prices to be displayed.</p> <p>This setting does not apply to BMEcat catalogs, which do not support PunchOut.</p>

Options	Description
Tier	<p>You can rank suppliers within the context of a specific catalog. The tier ranking levels are:</p> <p>Platinum</p> <p>Gold</p> <p>Silver</p> <p>None (default value; ranking is not required)</p> <p>This allows you to influence the relative position of that supplier in catalog search results for results that are ordered by relevance, and breaks ties among results that would otherwise have the same relevance. This can help purchasing managers position certain catalogs to direct purchases.</p> <p>The ultimate position of an item in search results depends on the user's initial query, so in some cases, an item with the ranking of None could be displayed before an item with the ranking of Gold.</p> <p>The ranking is per catalog, so the same supplier could have catalogs of different ranks.</p>
Relaxed Validation	<p>You can configure validation for PunchOut items so that errors regarding the Classification Code and Supplier URL attributes are skipped. Relaxing validation to skip errors creates a clean catalog that can be activated without any further work.</p> <p>To configure relaxed validation:</p> <ol style="list-style-type: none"> 1. Click Configure. 2. Click Skip Errors for each attribute. 3. Click OK. <p>This setting does not apply to BMEcat catalogs, which do not support PunchOut items.</p>
Schedule Price/Availability Update	Available after you select a supplier. You can choose to request the latest price and availability updates from suppliers at frequent intervals. Click Configure to configure the settings.
File Format	<p>This setting is only available if your site is enabled for managing catalogs using the content management system (CMS). Format options are:</p> <ul style="list-style-type: none"> ○ CIF ○ CXML ○ BMECAT12 ○ EXCEL
Catalog File	Click Select File , and then browse to the catalog file you want to import.
Optional Image file	<p>Click Select File, and then browse to the location of the image file that you want to import for the catalog.</p> <p>The maximum file size limit for CIF catalogs is 300 MB.</p>

5. Click **Import**.

How to import supplier logos

You can import supplier logos to be displayed against each supplier on the **Catalog Home** page.

Prerequisites

Images must be in JPEG, GIF, PNG, BMP, or TIFF format. They can have any filename, but they must have the appropriate filename extension. You map suppliers to images in the `SupplierLogos.csv` file by specifying the `Supplier ID` and the corresponding image file name. The file names and filename extension for images are case-sensitive. SAP Ariba Procurement solutions do not resize the original images that you provide. Ariba recommends that the image file size be less than 75 x 75 pixels.

Context

The logos are only displayed when users choose **Supplier > View All Suppliers** from the **Shop By** pane on the **Catalog Home** page. A sample, `SupplierLogos.csv` file is as follows:

```
Supplier ID, Image
sid508,508.bmp
sid498,Server.jpg
sid489,489.tif
sid466, logo.gif
```

You import supplier logos by importing a ZIP file that contains the image files and the `SupplierLogos.csv` file, or by importing the `SupplierLogos.csv` file and the image files individually.

Note

If you are reimporting supplier logos, ensure that your file contains images for all the previously loaded supplier logos too. The previously loaded images will not be displayed if you do not include them in the new file being imported.

Procedure

1. On the dashboard, click **Manage > Core Administration**.
2. Select **Catalog Manager > Catalogs**.
3. Click **Import Supplier Logo**.
4. Browse to the location of the ZIP file containing the images and the `SupplierLogos.csv` file and click **Import** to import the supplier logos.

Alternatively, import the `SupplierLogos.csv` file and the image files individually.

Topics about validating catalog data

[Validation phases \[page 22\]](#)

Catalog validation is the first step of a catalog import: whenever you start an import, catalog validation runs implicitly as the first phase. You can also validate CIF and cXML catalogs manually.

[Configuring validation and relaxed validation for PunchOut items \[page 33\]](#)

If the SAP Ariba solution detects an error during the validation process, it reports the error and stops the catalog from being promoted further. You can also skip certain errors by configuring the PunchOut catalog's validation so that errors on certain attributes are skipped.

[Reporting errors \[page 34\]](#)

You can print or e-mail errors, which is especially useful for reporting errors to the supplier, so that they can be fixed in the next version. You can specify which errors to display before you print or send the report. When you e-mail errors, only the first 2,000 errors are sent.

[Fixing syntax errors \[page 36\]](#)

If a CIF or cXML catalog file fails a syntax check, you must fix or delete the data in the catalog before you can continue.

Validation phases

Catalog validation is the first step of a catalog import: whenever you start an import, catalog validation runs implicitly as the first phase. You can also validate CIF and cXML catalogs manually.

In sites enabled for managing catalogs using the content management system (CMS), catalog validation occurs within the CMS. For more information, see [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#).

Validating catalog data includes three phases:

- Validating syntax
- Validating semantics
- Validating based on rules

In sites enabled for managing catalogs using the content management system (CMS), catalog validation occurs within the CMS. For more information, see [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#).

Related Information

[Syntax validation and syntax checks \[page 23\]](#)

[Semantic validation \[page 24\]](#)

[Validation rules \[page 25\]](#)

Syntax validation and syntax checks

A catalog item must be well-formed to be loaded into your SAP Ariba solution. A well-formed catalog item includes all required content in the correct format. For example, every catalog entry must have the correct number of fields, each field must have the correct data type in it, and so on.

If you're loading catalogs from Ariba Network, the syntactic validation is performed on Ariba Network. If you're using another method to load catalogs, validation is the first step of the import process.

The syntax checks that verify catalog files vary for CIF, cXML, and BMEcat files. For more information on the correct format for CIF, cXML, and BMEcat catalog files, see the *Catalog format reference*.

Syntax checks for CIF files and cXML files

Some syntax checks apply to both CIF and cXML files.

These include:

- **Field length:** Verifies that no field exceeds the maximum length for its field type. For information on maximum lengths for each field type, see the *Ariba Catalog Format Reference Guide*.
- **Required fields:** Verifies that all required fields are present.
- **Number formats:** Verifies that integers and decimals are formatted correctly.
- **Price fields:** Verifies that the format is correct and that there is a currency specified.
- **Parametric data:** Verifies that parametric data (if any) parses according to the specification and that there are no duplicate attribute names in the same parametric type. Note that attribute names that are identical except for case (such as Diameter and diameter) are considered duplicates.
- **Duplicate part IDs:** Verifies that if a catalog file has two items with the same supplier ID, supplier part ID, and supplier part auxiliary ID, those items are considered duplicates. Note that IDs are case sensitive. For example, IDs that are identical except for case (such as 45abc and 45aBc) are not considered duplicates.
- **Character set:** Verifies that the character set specified in the file is valid. If it is not valid, the application returns the following error:
XML parsing exception: java.io.UnsupportedEncodingException: 8821
where 8821 is the invalid character set code.

Syntax checks for BMEcat files

BMEcat catalogs are processed by a separate content management system (CMS) with its own validation engine.

The following syntax checks apply to BMEcat files:

- Compliance with the BMEcat 1.2 XML DTD
- Correct data type for all attribute and element values (for example, <QUANTITY_MIN> must be an integer)
- Start date before end date for items with date-specific pricing

An error for any of these syntax checks causes the file to fail validation. If a catalog fails validation, the catalog manager must fix any errors in the BMEcat XML and import it again. If a catalog file contains unsupported elements, attributes, or values, it does not fail validation. Unsupported elements, attributes, and values are ignored and are not imported as catalog data. Items that have a thumbnail image but no other images are also ignored.

In sites enabled for managing catalogs using the content management system (CMS), syntactic validation (of both locally imported and Ariba Network catalogs) is performed within the CMS. For more information, see [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#).

Semantic validation

Some validation errors are not errors in the catalog file, but errors in how the catalog integrates with the rest of your configuration. These are semantic validation errors. For example, if a catalog file references a unit of measure not defined in your configuration a semantic validation error occurs.

During this phase of validation, the SAP Ariba solution checks the following units and codes for each item:

- **Currency:** The item's currency must be valid for your configuration. Currencies are mapped types, which means that all incoming currencies go through a mapping to translate the incoming currency names into Ariba's standard currency terminology. A currency is not valid unless it meets the following criteria:
 - The currency code has a simple map entry.
 - The value the code is mapped to in the simple map has a corresponding Currency object.
 - The Currency object has a valid current conversion rate to the system currency.For information on currencies in SAP Ariba solutions, see the *Common data import and administration guide*.
- **Unit of measure:** The item's unit of measure must be valid for your configuration. If a catalog does not use your canonical units of measure, you must define a mapping file to be sure that the incoming terminology is interpreted correctly.
For information on unit of measure mappings in SAP Ariba solutions, see the *Common data import and administration guide*.
- **Commodity code:** The item must have at least one domain-specific commodity code that maps to a commodity code in the SAP Ariba solution. When one valid commodity code is found for the item, it is considered valid, even if other codes are invalid. The following validation rules apply:
 - Commodity codes must contain an even number of digits. For example, 12345 would be an invalid commodity code, while 123456 would be valid.
 - If an exact match is not found for a commodity code, the system recursively removes two digits and tries to find a match for the parent commodity code. For example, if you import 123456, and the system finds that it cannot find an exact match, it removes the last two digits and tries to find a match for the parent commodity, which would be 1234 in this example. If a match is found, the commodity code is deemed valid. If no match is found, the system removes two more digits and repeats the search for a match. This continues until only two digits remain. If no match is found for the final two digits, a validation error is thrown.For more information on mapping commodity codes in SAP Ariba solutions, see the *Common data import and administration guide*.
- **Supplier ID:** The item's supplier ID must match the organization ID of a common supplier in your configuration; otherwise, you are issued a warning. If you receive this type of error, often the common supplier exists in your configuration but the IDs are not set up properly.
For information about common suppliers and supplier organization IDs in SAP Ariba solutions, see the *Common data import and administration guide*.
SAP Ariba solutions also supports the import of multi-supplier CIF catalogs.

If a catalog file includes a currency, unit of measure, or commodity code that is not recognized, and you decide that the value in the catalog is wrong, you can fix the data in Ariba Administrator and revalidate the catalog. For instructions, see [About Fixing Syntax Errors \[page 36\]](#).

To fix problems with supplier identification, you can use the **Supplier Manager** workspace in Ariba Administrator to add a new common supplier, or to add a new supplier organization ID to an existing common supplier. It's also possible that the supplier was added to Ariba Network after the most recent run of the scheduled task **UpdateSupplierPendingItems**. This task manages pending requests to add new suppliers to the SAP Ariba solution, and makes updates if those suppliers have been added. The task runs once every weekday.

Validation rules

A validation rule is a set of constraints applied on catalog item field value.

The catalog files published by the suppliers contain data related to catalog items. Sometimes catalog data in the files might be missing or not relevant to buyer requirements. A buyer can define a set of validation rules for catalog fields to specify the catalog data they need from the supplier.

When creating a validation rule you can specify whether the value for a catalog field is mandatory or optional, and also specify the value that is expected in a catalog field. The set of values are determined by the type of the field (for example, string...). A catalog fails validation if a catalog field value on any line item fails to meet the constraints set in a validation rule.

i Note

Validation rules apply only to CIF and cXML catalogs. They do not apply to BMEcat catalogs.

If your site is configured to manage catalogs using the content management system (CMS), validation rules that are created from the ► **Catalog Manager** ► **Catalog Validation Rules** ► task are not applicable. For more information on validation using CMS, see [Topics about validating catalog data using the content management system \(CMS\) \[page 100\]](#).

For example, if a buyer requires that the supplier must always provide a value for the catalog field Green, then they specify that the field Green is a required field. If the buyer requires that the price of the catalog item must always be within a range, then they specify the expected range for the catalog field Price.

For a list of the constraints, see [About Working with Constraints \[page 29\]](#).

The buyer can edit the default global validation rules available in the SAP Ariba solution that are applicable to all suppliers or create supplier-specific validation rules for individual suppliers.

The validation rules take effect when catalogs are loaded in SAP Ariba solutions either locally or downloaded from Ariba Network when the **Ariba Network Full Subscription Synchronization** scheduled task is run.

i Note

Suppliers can punch in to the SAP Ariba solution to view or download the validation rules before publishing catalogs to the buyer on Ariba Network. A supplier cannot view the supplier-specific rules that are created for other suppliers.

Related Information

[About Global Validation Rules \[page 26\]](#)

[Modifying Validation Rules \[page 27\]](#)

[About Working with Constraints \[page 29\]](#)

[About Re-initializing the Validation Rules \[page 32\]](#)

Global and supplier-specific validation rules

Global validation rules are rules that are applicable to all the suppliers. Supplier-specific validation rules are rules that are applicable only to a particular supplier.

Global validation rules

The default rules available in the SAP Ariba solution are global validation rules. You can edit the global validation rules.

i Note

If a field is set as required, then the field and its value must be specified in the catalog file.

The following table lists the default global validation rules that are available in the SAP Ariba solution:

Field	Field Type	Required	Constraints	Enabled
Best Price/Top Item	Boolean	No		Yes
Classification Code (SPSC Code in the catalog CIF template)	String	Yes		Yes
Default Relevance	Number	No		Yes
Description	String	Yes		Yes
Effective Date	Date	No		Yes
Expiration Date	Date	No		Yes
Full Size Image	Boolean	No		Yes
Green	Boolean	No		Yes
Hazardous Materials	Boolean	No		Yes
In Kit Only	Boolean	No		Yes
Language	String	No		Yes
Lead Time	Number	No		Yes
Manufacturer Name	String	No		Yes
Manufacturer Part Id	String	No		Yes
Manufacturer URL	Boolean	No		Yes
Price	Number	Yes		Yes
Punchout Enabled	Boolean	No		Yes

Field	Field Type	Required	Constraints	Enabled
Punchout Level	String	No	In list [store, aisle, shelf, product]	Yes
Short Name	String	No		Yes
Supplier Part Auxiliary Id	String	No		Yes
Supplier Part Id	String	Yes		Yes
Supplier URL	Boolean	No		Yes
Territory Available	String	No		Yes
Thumbnail Image	Boolean	No		Yes
Unit of Measure	String	Yes		Yes

Supplier-specific validation rules

You create or edit supplier-specific rules for one supplier at a time. When a catalog field has both global and supplier-specific validation rules, the supplier-specific rules take precedence.

How to modify validation rules

You can modify global validation rules that are common to all suppliers or create supplier-specific validation rules for individual suppliers.

Prerequisites

Only users belonging to the **Customer Catalog Manager** group can modify or create validation rules.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Click **Catalog Manager**.
3. Click **Catalog Validation Rules**.
4. Locate the catalog field that you want to create a validation rule for or search for the field using the search filters. You can search using any one or a combination of the search fields.

For example, you can search for all the rules available for a particular supplier or search for all rules for a particular field. Click **Search Options** to display the available search fields.

5. Choose **Edit Rule** from the **Actions** dropdown menu for a catalog field.

i Note

To reset a validation rule to its default configuration based on the field definition, choose **Reset to Default**. A popup displays the default value that the field will be reset to. Click **OK** to confirm the reset.

6. Select an operator and a suitable value for a constraint. If no values are specified for a constraint, the constraint does not have an effect on the validation rule.

i Note

You can specify values for multiple constraints to make a valid combination. If you do not make a valid combination, an error message is displayed.

7. Click **Save** to save the validation rule.

Related Information

[How to create supplier-specific validation rules \[page 28\]](#)

How to create supplier-specific validation rules

You can create supplier-specific validation rules by editing global validation rules.

Procedure

1. Log in to the SAP Ariba solution as a **Customer Catalog Manager**.
2. On the dashboard, click ► **Manage** ► **Core Administration** ►.
3. Click **Catalog Manager**.
4. Click **Catalog Validation Rules**.
5. Locate the catalog field that you want to create a validation rule for or search for the field using the search filters.
6. Choose **Add Supplier Rule** from the **Actions** dropdown menu for a catalog field.

i Note

The **Add Supplier Rule** link is available only when editing global validation rules.

7. In the **Add Validation Rule** page select or search for the supplier from the **Supplier** dropdown menu. The list displays only those suppliers that do not have a validation rule for this field.
8. Click the **Apply to product level punchout items** check box if you want the validation rule to apply to the product level punchout items also.

9. Select an operator and a suitable value for a constraint. If no values are specified for a constraint, the constraint does not have an effect on the validation rule.

i Note

You can specify values for multiple constraints to make a valid combination. If you do not make a valid combination, an error message is displayed:

10. Click **Save** to save the validation rule.

Related Information

[How to delete or disable a supplier-specific validation rule \[page 29\]](#)

How to delete or disable a supplier-specific validation rule

You can delete or disable supplier-specific validation rules if you no longer need them. Disabling validation rules allows you to keep the rule for future use.

Procedure

1. On the **Catalog Validation Rules** page, locate the supplier-specific validation rule for a catalog field that you want to delete or disable.
2. Do one of the following:
 - To **delete** a supplier-specific validation rule, choose **Delete Rule** from the **Actions** dropdown menu for the catalog field to delete the validation rule.
 - To **disable** a supplier-specific validation rule, choose **Disable Rule** from the **Actions** dropdown menu for the catalog field to disable the validation rule.

To enable a validation rule that has been disabled, select **Enable Rule** from the **Actions** dropdown menu for the catalog field.

Working with constraints

When modifying a global validation rule, or creating or editing a supplier-specific validation rule, you specify values for an operator against a constraint. You can specify values for multiple constraints to make a valid combination.

For example, if you want to make the value for the **Expiration Date** field mandatory and the date to be after a particular date, do the following on the **Add Validation Rules** page:

- Select **Yes** for the operator **Equal to** for the constraint **Required**.

- Select **After** as the operator for the constraint **Date** and choose the particular date as its value.

If you do not specify a value for an operator against a constraint, the constraint has no effect on the validation rule. An error message displays if you specify values for multiple constraints that do not make a valid combination.

The following table lists the various constraints the available operators and the field types that the constraints are applicable to:

Constraint	Operators	Field Type	Description
Required	Equal to	Boolean	Specifies whether the value for the catalog field is mandatory or optional.
List	<ul style="list-style-type: none"> • In • Not in 	String	Specifies whether a catalog field value should belong to a list of values or not.
Number Range	<ul style="list-style-type: none"> • In • Not in 	Number	Specifies whether the value of the catalog field should be within a range of numbers or not.
Number	<ul style="list-style-type: none"> • Equal to • Not equal to • Greater than • Less than 	Number	Specifies the value that is expected in a catalog field based on the operators.
Date Range	<ul style="list-style-type: none"> • In • Not in 	Date	Specifies whether the value of the catalog field should be within a range of dates or not.
Date	<ul style="list-style-type: none"> • Equal to • Not equal to • After • Before 	Date	Specifies the date that is expected in a catalog field based on the operators.
String	<ul style="list-style-type: none"> • Equal to • Not equal to 	String	Specifies if a catalog field value should be a specified string or not.
Validate URL	Equal to	URL	Used to specify if a URL has to be validated or not.
Regular Expression	<ul style="list-style-type: none"> • Equal to • Not equal to 	String	Specifies whether a catalog field value should meet the conditions specified in the regular expression or not.

Note

The **Greater than or equal to** and **Less than or equal to** operators are not supported. Instead use the **Greater than** or **Less than** operators.

Using regular expressions

A regular expression (also referred to as regex or regexp) is a special text string for describing a search pattern. It provides a concise and flexible means for matching strings of text, such as particular characters, words, or patterns of characters.

When creating validation rules using the **Regular Expression** constraint, you choose the **Equal to** operator and then specify the regular expression string to match the field value. For example, if you want the **Description** field to always contain the word Computer, you specify the following regex string:

```
. *Computer. *
```

Note

If you do not want the **Description** field to contain the word Computer, you choose the **Not equal to** operator.

The following table lists a few examples of regular expressions:

Regular Expression	Description
4321.	The value of the field must start with 4321 followed by any character. Example: 4321, 43215, 43219
4321*	The value of the field must start with 4321 followed any number (zero or more) of characters same as the character prior to *. Example: 4321, 43211, 4321111
4321[0-9]{4}	The value of the field must start with 4321 followed by any four digits. Example: 43210000, 43217854, 43211471
4321[0-9]{4} 2411[0-9]{4} 1411[0-9]{4}	The value must start with 4321 or 2411 or 1411 followed by any four digits. Example: 43218956, 14117854, 24116985
\Acomputer.*	The value of the field must start with the word computer followed by any number of characters. Example: computer parts, computers, computer components, computer 123
. *computer. *	The value of the field must contain the word computer. Example: ACME computer, computer peripherals, New computer parts
. *recycle.* . *biodegradable.* . *non-toxic.*	The value must contain the strings recycle or biodegradable or non-toxic. Example: Recycled tissue paper, Non-toxic metal frame, Biodegradable plastic bag.
partID[0-9]{2}	The value of the field must start with partID followed by 2 digits. Example, partID01, partID74, partID99

Resetting, importing, and exporting validation rules

You reset validation rules to the default global validation rule set, or you can import and export validation rules in XML format.

Resetting validation rules

You can reset the validation rules in the SAP Ariba solution to the default global validation rule set by running the **Initialize Default Validation Rules** scheduled task.

For information on how to run the task, see [Initialize Default Validation Rules \[page 158\]](#).

i Note

Before you reset the validation rules to the default rule set, take a back-up of any validation rules that you may have edited or created previously as they cannot be retrieved after the task is run.

Importing and exporting validation rules

The customer catalog manager can import and export validation rules in the XML format. This is primarily used by the Ariba Customer Support team when migrating the validation rules from the test to the production site.

i Note

It is recommended that you do not edit the exported XML file and then import it as it may cause problems.

For more information, see [Exporting and Importing Validation Rules \[page 163\]](#).

Related Information

[Global and supplier-specific validation rules \[page 26\]](#)

Configuring validation and relaxed validation for PunchOut items

If the SAP Ariba solution detects an error during the validation process, it reports the error and stops the catalog from being promoted further. You can also skip certain errors by configuring the PunchOut catalog's validation so that errors on certain attributes are skipped.

Configuring validation

Some errors may be borderline errors, or errors that you might treat as errors or warnings. You specify how to handle these errors by setting parameters in Ariba Administrator.

The borderline errors are as follows:

- **Duplicate items:** If a catalog file has two items with the same Supplier ID, Supplier Part ID, and Supplier Part Auxiliary ID, those items are considered duplicates. By default, the SAP Ariba solution checks for duplicates, reporting them as errors and stopping the catalog at the validation stage if any are found.

i Note

Duplicates are detected only when you import the catalog; when you revalidate the catalog in Ariba Administrator, it does not detect duplicates.

- **Mismatched Supplier ID:** In most cases, the Supplier ID in the catalog file must match the ID of the subscription under which you are importing the catalog. If they do not match, you can have the import generate a warning and continue, or generate an error and stop the catalog at the validation stage. If the catalog is imported with the **Allow multi-supplier CIF** option enabled, no errors or warnings are generated when the Supplier ID of the subscription does not match the Supplier IDs in the catalog file.
- **Unknown supplier:** If the Supplier ID on the catalog is not mapped to a common supplier, an error is generated. Even if the catalog is imported with the **Allow multi-supplier CIF** option enabled, an error is generated if the Supplier ID is not in the SAP Ariba solution at all. However, if a catalog contains items marked as partial items, they can be missing the supplier field and the catalog will still pass validation. For more information about partial items, see [About Partial Catalog Items \[page 61\]](#).
- **Mismatched item count (CIF files only):** During validation, the itemcount field in the file header is compared with the number of items in the file. If the item count does not match the header value, you can have the application generate an error and stop the catalog at the validation stage, or generate a warning and continue.

Relaxed validation for PunchOut items

Relaxing validation to skip errors creates a clean catalog that can be activated without any further work.

To configure validation for PunchOut items in SAP Ariba solutions, use the **Relaxed Validation** option during import. For more information, see [Importing catalogs \[page 15\]](#).

To configure validation for PunchOut items, click **Configure** and choose the **Skip Errors** option on specific item attributes when manually importing a local catalog. For details, see the *Catalog format reference*.

To relax validation of catalogs downloaded from Ariba Network subscriptions, log in to your Ariba Network account and set the **Catalog Validation Preferences** in the **Configuration** section. For details, see the *Catalog format reference*.

For more information about PunchOut items, see [About Searching PunchOut Items \[page 145\]](#).

Reporting errors

You can print or e-mail errors, which is especially useful for reporting errors to the supplier, so that they can be fixed in the next version. You can specify which errors to display before you print or send the report. When you e-mail errors, only the first 2,000 errors are sent.

Note

Suppliers can punch in to the SAP Ariba solution to view, print, or email the validation errors.

How to view catalog validation errors

Prerequisites

You must be a member of the **Customer Catalog Manager** group to perform this task.

Procedure

1. Select **Manage > Core Administration**.
2. Click **Catalog Manager**.
3. Click **Catalogs**.

All the available catalogs are displayed. **Validation Error** displays in the **Status** column of catalog versions that fail validation.

4. To view the catalog that has failed validation, click the link in either the **Version**, **Status**, or **# of Items** column. The catalog errors page opens.
5. Click on the count in the **Occurrences** column for an error type to view only those errors, or click **List All** to view all the errors.

To view the each error per line item, choose **Detailed** from the **Error Display** dropdown menu.

6. On the **View Errors** page, click **Suggested Fixes** for each error.

How to select which validation errors to view

Prerequisites

This task assumes you are viewing catalog validation errors on the **View Errors** page.

Procedure

1. On the **View Errors** page, above the **Summary** table, locate **View Error Types** and click **Change**.
2. On the **Set Error Severity and Type View** page, specify the severities and error types you want to display, and then click **OK**.

Related Information

[How to view catalog validation errors \[page 34\]](#)

How to print catalog validation errors

Prerequisites

This task assumes you are viewing catalog validation errors on the **View Errors** page.

Procedure

1. On the **View Errors** page, select the errors you want to print.
2. Click **Print Errors**.
The error report appears in a new web browser.
3. Use your web browser's **Print** command to print the errors as you would any other document.
4. Close the second web browser when you have finished printing.

Related Information

[How to email catalog validation errors \[page 36\]](#)

[How to view catalog validation errors \[page 34\]](#)

How to email catalog validation errors

Prerequisites

This task assumes you are viewing catalog validation errors on the **View Errors** page.

Procedure

1. On the **View Errors** page, select the errors you want to send.
2. Click **Email Errors**.
3. The **Email Errors** page appears. The **From** field contains the e-mail address taken from the profile of the user name under which you logged in.
4. In the **To**, **CC**, and **BCC** fields, specify one or more e-mail addresses separated by spaces or commas as follows:
 - In the **To** field, specify the primary recipients of the report.
 - In the **CC** field, specify recipients who might be interested in seeing the report.
 - In the **BCC** field, specify recipients who should receive the report without other recipients seeing their email address or necessarily knowing they received it.
5. In the **Subject** field, keep the default subject or type another meaningful subject.
6. In the **Message** field, keep the default information or add additional information as needed.
7. To include the catalog file as an attachment, click the **CIF 3.0 Format** or **cXML 1.1 Format** check box, depending on the format in which you want to send the file. If the catalog file is a multi-supplier CIF, you cannot send it in cXML format.

If the catalog file is large, you might slow the performance on your mail server by attaching it to an e-mail. As a general rule, if a catalog file contains over 250 items, it is best to post the file on a central server and include the path or URL to that server in the **Message** field.

8. If you want to select additional errors, click **Add Errors**, and then repeat these steps.
9. When you are satisfied with the e-mail settings, click **Send**. When a page appears confirming that your email was sent, click **OK**.

Fixing syntax errors

If a CIF or cXML catalog file fails a syntax check, you must fix or delete the data in the catalog before you can continue.

Fixing and deleting items in a CIF or cXML catalog file is a temporary fix. If a BMEcat catalog file fails a syntax check, it is not imported, and you must fix the errors in the file before re-importing it.

You should inform the supplier of the changes and preferably obtain a corrected version of the catalog to avoid repeating the same errors in a later import.

For complete information about the correct syntax of catalog files, see the *Catalog format reference*.

How to fix data in a catalog file

You can fix a data error in a single item or in multiple items.

Prerequisites

This task assumes you are viewing catalog validation errors on the **View Errors** page. You can only perform it on errors in CIF and cXML catalogs. It is not available for BMEcat catalogs.

Procedure

1. Perform one of the following actions:
 - Fix an error in a single item: Below the **Summary** table on the **View Errors** page, set **Error Display** to **Detailed**, click the line item number, and then correct the error. You can also access individual line items from the **Catalog Home** page. Click the number of items for the version that contains the errors, click **Edit** next to the item you want to fix, and then correct the error.
 - Fix an error in multiple items: Set **Error Display** to **Summarized**, click the number of occurrences for the error you want to fix, and then correct the error.

For more information about editing catalog content, click **Help** on the page where you are viewing the errors and follow the instructions.

2. Revalidate the catalog.

Related Information

[How to revalidate catalogs \[page 94\]](#)

How to delete data with errors from the catalog file

As a temporary fix, you can delete data with errors from a CIF or cXML catalog file. You cannot delete items from a BMEcat catalog file.

Procedure

1. View the catalog errors. See [Viewing Catalog Validation Errors \[page 34\]](#).
2. Select the item or items to delete, and then click **Delete Items With Errors**.

When viewing errors on the **Error Summary** page, you must set the error display to **Detailed** to see individual items.

3. Revalidate the catalog.

Related Information

[How to revalidate catalogs \[page 94\]](#)

Activating catalog items and analyzing the catalog data

After the data in an incoming catalog has been validated and errors have been resolved, there are three additional steps that must be completed before data is available to users on SAP Ariba solution's product catalog.

Activating catalog items

The following three steps make catalog items available to users after it has been validated:

- Analyze the catalog to ensure it contains the correct items.
- Approve the catalog so the application can generate an approvable document, summarizing the new and updated catalog items, and submit the summary for approval.
- Activate the catalog so that users can see its items in the SAP Ariba solution's product catalog.

Depending on how you set up your subscription, if the catalog contains no errors, these steps can be bypassed and the catalog can be activated automatically without any user intervention.

Analyzing catalog data

Ariba Administrator allows you to [create a report \[page 40\]](#) that compares a new version of the catalog to any previous version of the catalog. The comparison report can be very useful in helping to decide whether to activate the new version

Approving catalog data

For each catalog that requires approval, the application generates a supplier data update (SDU)/catalog approval request document. The associated catalog is approved when catalog managers approve the catalog approval request document.

Sites enabled for managing catalogs using the content management system (CMS) can be configured such that, the items in a catalog can be divided into different sets, and different approvers can be assigned to [approve these different sets of items \[page 136\]](#). The catalog subscription is approved after all the associated catalog approval requests have been approved by the individual approvers in the CMS.

Your site can also be configured so that, the second-level approval of catalog subscriptions is not triggered after the associated catalog content document-level approval requests have been approved by approvers in the CMS.

[How to create a comparison report to analyze your catalog data \[page 40\]](#)

You can create a report that compares a new version of the catalog to any previous version of the catalog, which is useful in helping to decide whether to activate the new version.

[How to approve the catalog \[page 41\]](#)

After a catalog is validated, unless you specified **Skip Approval** for the subscription, the catalog must be approved before it can be activated.

[How to activate a catalog \[page 42\]](#)

After a catalog is approved, it must be activated to make it visible to users.

How to create a comparison report to analyze your catalog data

You can create a report that compares a new version of the catalog to any previous version of the catalog, which is useful in helping to decide whether to activate the new version.

Procedure

1. Do one of the following:
 - On the **Catalogs** page of the **Catalog Manager** workspace, choose the two versions of the catalog you want to compare, and then click **Compare Versions**.
 - If you are already viewing a version of the catalog, click the **Step 2. Analyze Data** link.
2. On the **Compare Versions** page:
 - a. From the **Select version to compare** list, select the version of the catalog you want to analyze (typically the newest version).
 - b. From the **Select version to compare against** list, select the version of the catalog against which you want to compare the version you selected in the previous step, or select **All active items** to compare the catalog against all activated catalog items in the subscription.

If this is a new catalog with no previous versions, the report compares the version to itself, so items are listed as unchanged.

3. Specify the price-change percentage of items you want to list as a separate group.
4. Click **Compare**.

The report appears on the **Comparison Results** page. The results should be taken in the context of which catalogs you compare and if they are incremental load or full load catalogs.
5. In the comparison summary, select the type of items you want to view in more detail, and then click **View** to see the comparison details appear below the comparison summary.
6. In the comparison details, to see the full information for a catalog item, click its link.

i Note

The complete information for the catalog item appears on the **View Comparison Item Details** page.

7. Click **Close** when you have finished viewing the item's details.
8. **Optional:** Do one of the following:
 - To e-mail this analysis, click **Email Report**, and then fill out the **Email Comparison Report** screen. Then click **Send**.

- To print this analysis, click **Print Report**, and then use your Web browser's print command (such as **File > Print**) to print the report that appears in a second Web browser.
- To export the report details in an Excel format, click **Export**.

The Excel Workbook file has the following sheets:

- Comparison Summary provides a count of the number of items in various categories
- New Catalog Items lists the new items that have been added in the latest version
- Updated Catalog Items lists the items that have been updated
- Deleted Catalog Items lists the items that have been deleted
- Items with Price increased list the items whose price has increased by more than 20%

Note that the items that have not changed are not listed.

9. When you have finished reviewing the report, click **Done** to return to the **Compare Versions** page where you can do another analysis, or click **Catalog Home**.

Related Information

[How to approve the catalog \[page 41\]](#)

How to approve the catalog

After a catalog is validated, unless you specified **Skip Approval** for the subscription, the catalog must be approved before it can be activated.

Prerequisites

You must be a member of the **Catalog Approvers** group in order to approve catalogs.

Context

A catalog needing approval enters the **Waiting for Approval** status and is either automatically or manually sent for approval. In SAP Ariba solutions, the catalog approval request is sent to the **To Do** pages of members of the **Catalog Approver** group. After a catalog is sent for approval request, it cannot be edited or withdrawn.

If an approval request is denied, a catalog reverts to **Verified** status. The catalog can no longer be submitted automatically for approval. The catalog must either be deleted, or the issue resolved that caused the approver to deny the request. When resolved, a catalog can be manually resubmitted for approval.

Procedure

1. On the dashboard, click **Manage > My To Do**.
2. Locate and select the catalog approval request, and click **Approve**.
3. Add additional approvers, comments, or attachments as necessary.
4. Click **Approve**.

Results

The catalog enters the **Approved** status and is ready for activation.

How to activate a catalog

After a catalog is approved, it must be activated to make it visible to users.

Context

During activation, the items in the catalog are added to the search index, and the status of each catalog that's being activated is shown as **Activating**. When the process is complete, the status changes to **Activated**. If the catalog is an incremental catalog, the status is **Activated + n**, where n is the number of incremental catalogs activated after the original catalog. Note that all catalog nodes must be running during catalog activation.

After a catalog is activated, you will need to deactivate it only if you no longer want to use the subscription, if you want to edit it in Ariba Administrator, or if you want to take the version offline to edit it manually. For more information about editing a catalog version, see , [“About Managing Catalogs.” \[page 39\]](#).

When you activate a new full-load version of a previously existing catalog, the currently-activated full-load version is deactivated automatically. Incremental-load catalogs activated in a subscription with an activated full-load catalog do not automatically deactivate the full-load catalog.

Contract subscriptions are deactivated automatically when the contract is closed and category-definition subscriptions are deactivated automatically when the category definition is deactivated.

If a supplier deletes or renames a subscription on Ariba Network, and you run `Ariba Network Full Subscription Synchronization` while that catalog is pending activation, the catalog is not activated. An e-mail notification is sent to the user belonging to the **Customer Catalog Manager** group.

When you activate a catalog, the catalog subscription to be published is queued to a batch of other subscriptions pending publication. Batches are published every two hours. If the subscription is set to **Activate Automatically**, that version is queued to the batch as soon as it is approved (or as soon as it is validated, if you specified **Skip Approval**).

A contract subscription is queued to the batch automatically when a contract is opened.

A procurement category definition subscription is queued to the batch automatically when a category definition is activated.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Select the catalog to activate.
4. Click **Activate**.

Topics about displaying Catalog Items to Users

[Product Catalog \[page 45\]](#)

The product catalog is a view of items in currently activated catalogs. You use various techniques to filter data and decide which catalog items to make visible to users.

[Catalog hierarchy \[page 46\]](#)

A catalog hierarchy is the set of product categories that you can browse. The catalog hierarchy is a mapping from product categories (the ones users see) to domain-specific commodity codes (used for efficient lookup of the products).

[Shopping by classification systems \[page 55\]](#)

SAP Ariba solutions can be configured to provide support for multiple product classification systems and enable users to shop for items based on the classification systems. Users can browse the hierarchy of each classification system and search for relevant items.

[Displaying icons \[page 55\]](#)

To direct your spend to certain items or suppliers, you can display icons with them as visual cues to users.

[How to create catalog views \[page 56\]](#)

The **Catalog Views** task in the **Catalog Manager** workspace allows you to restrict users' access to a catalog based on a set of constraints you define.

[Creating item constraints \[page 57\]](#)

Catalog managers can restrict user's access to individual items in a catalog by defining constraints based on extensible catalog fields that are mapped to master data fields.

[How to create item constraints \[page 59\]](#)

You can create catalog item constraints for different scenarios based on the master data fields available in the User, Requisition, Contract, and Invoice classes.

[Preferred catalog items and preferred suppliers for non-catalog items \[page 60\]](#)

You can direct your organization's spend towards certain catalog items by configuring them as preferred items. And you can direct spend towards certain suppliers when procuring non-catalog items by configuring them as the preferred suppliers for non-catalog items.

[Using additional catalog item attributes \[page 61\]](#)

Your SAP Ariba solution supports the use of additional ordering attributes on catalog items, including prompting users to fill in additional information, prompting users to choose fields before ordering, sending specified fields to the supplier, and allowing users to choose only certain values for each field.



[Displaying PunchOut items \[page 63\]](#)

PunchOut items are items users order directly from the supplier. Punching out means being redirected to the supplier website to order items.

[Displaying catalog kits and statuses \[page 69\]](#)

Catalog items can be grouped into **catalog kits**. Catalog kit statuses identify the current state of the kit.

[How to change visibility and order settings for catalog display lanes \[page 74\]](#)

You can configure catalog display lanes using the **Catalog Manager**  **Catalog Display Customization**  task. Display lanes are grouped catalog categories, such as **Favorites**, that users can view easily on the **Catalog Home** page.

[Catalog display lane for buyer-promoted items \[page 75\]](#)

In SAP Ariba solutions, you can increase the visibility of specific catalog items by displaying them on the catalog home page in a **Promoted Items** display lane on the **Catalog Home** page, enabling users to quickly find and order the items.

[Cataloging favorite items in a catalog \[page 79\]](#)

In SAP Ariba solution sites, buying organizations can choose how users set, view, and work with favorite items in the catalog: the original favorites feature or the enhanced favorites feature.

[Custom content on the catalog home page \[page 82\]](#)

SAP Ariba solution sites can be configured to enable customer catalog managers to add customized content to the **Note** pane on the **Catalog Home** page. Content can be published in multiple languages to ensure that users view content in their preferred language.

[Displaying catalog item descriptions as formatted text \[page 85\]](#)

Catalog item descriptions can be displayed as formatted text in the item details pages of the SAP Ariba solution. Formatting options such as bold and italic font styles, paragraphs, line breaks, and lists are supported in CIF, cXML, and BMEcat catalog files.

[How to configure the visibility settings of the item description in catalog search results \[page 86\]](#)

SAP Ariba solution sites can be configured to enable customer catalog managers to hide the item descriptions from being displayed in the catalog search results pages.

[Displaying inventory items \[page 87\]](#)

Inventory items are items in your catalog that contain additional inventory-related details of items in a warehouse. Users can reserve inventory items in the warehouse for withdrawal at a later date by creating reservation documents. Inventory items are applicable only to sites integrated with SAP ERP.

Product Catalog

The product catalog is a view of items in currently activated catalogs. You use various techniques to filter data and decide which catalog items to make visible to users.

Members of the **Customer Catalog Manager** group can configure the details of how the catalog and catalog items are displayed to users. Members of the **Customer Catalog Manager** group can configure the details of how the catalog and catalog items are displayed to users.

Catalog data is generic. However, not all items are visible to all users. Instead, the application filters the data to determine which items are visible.

To view catalog items, users must be assigned to a purchasing organization. If not, the default catalog filter displays only the results where the `commonsupplier = null`. Because catalog items have a common supplier, all catalog items would be filtered out.

For more information about common suppliers in SAP Ariba solutions, see the *Common data import and administration guide*.

Filtering catalog data

In the SAP Ariba Catalog solution, you can add additional filters to your configuration to further limit the catalog items that are visible to various users. For example, if a catalog includes a territory field, you could filter the catalog items based on this field.

In addition to filters, the SAP Ariba solution lets you restrict access to catalogs by implementing catalog views. Views restrict or grant access to entire catalogs based on user group membership. For more information, see [How to create catalog views \[page 56\]](#).

If active catalog items are not visible in the catalog and you verify that filtering is not affecting their visibility, check to ensure that duplicate common suppliers do not exist for the supplier of the items.

Catalog hierarchy

A catalog hierarchy is the set of product categories that you can browse. The catalog hierarchy is a mapping from product categories (the ones users see) to domain-specific commodity codes (used for efficient lookup of the products).

In the catalog home page, the catalog hierarchy appears as a list in the **Shop By Category** section and **All Categories** in the search bar.

You create a catalog hierarchy using the hierarchy editor. You set up the hierarchy like a directory tree: categories are organized into folders that you can expand and collapse.

To set up the catalog hierarchy, you choose the labels you want to have in the hierarchy, and then map those labels to domain-specific commodity codes to specify which products go in the categories. The catalog hierarchy does not have to cover all possible product categories, just those you want most visible. If a category is empty (for example, because a custom filter prevents the user from seeing any of the items in the category), it does not appear.

Those items that are not in a specific category are grouped under the **Uncategorized Items** category. This is a permanent category that appears even if you attempt to delete it from the catalog hierarchy.

Domain-specific commodity codes, which are used in catalogs, are maintained by standards organizations and describe items in fine detail, such as “fountain pens”. Partitioned commodity codes, which are used by ERPs and are displayed in SAP Ariba solutions, describe items in less detail, such as “pens”. Your SAP Ariba solution uses commodity codes to group both types of codes, mapping the domain-specific commodity codes from catalogs to the SAP Ariba solution commodity codes used for display and for pushing to ERPs.

Because catalogs depend on commodity codes in your configuration, you should never delete a commodity code unless you're certain that no domain-specific commodity codes or partitioned commodity codes map to it.

For more information about commodity codes in SAP Ariba solutions, see the *Common data import and administration guide*.

For help in changing the order in which the categories are displayed, contact Ariba Customer Support.

Troubleshooting catalog hierarchy problems

When items in a catalog are not visible in the hierarchy where you expect them, it can be for several reasons, each of which you can check.

- **Empty categories:** If no products match a given value, the catalog won't show that category at all. For example, if you have set up a category for "wrenches" but don't have any catalog items that match the appropriate commodity code, users never see the "wrenches" label in the product catalog.
- **Invalid or filtered Supplier Organization ID:** If you think an item is in the catalog but you can't see it, double-check its Supplier Organization ID. If the supplier is not defined in the same partition or site as the user, or belongs to a supplier that's filtered in some other way, the item won't appear in the catalog. (There are additional filters on suppliers for PeopleSoft and SAP builds; see the relevant integration guides for more information.)
- **Incorrect mappings:** Verify that the mappings for your commodity codes, units of measure, and currency are correct.
- **Incorrect custom filter:** Verify that any custom catalog filters you have created are not filtering more than you had intended.

How to open the hierarchy editor

To create or edit a catalog hierarchy, use the **Hierarchy Editor** task in the **Catalog Manager** workspace. From the **Hierarchy Editor** page, you can add, delete, and reorganize categories and codes.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Hierarchy Editor** ►.

How to import a hierarchy

SAP Ariba solutions enable you to import XML versions of existing hierarchies.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Hierarchy Editor** ►.
3. Click ► **File** ► **Other** ► **Import Hierarchy** ►.

4. Click **Browse**, navigate to and select the XML file you want to import, then click **Open**.
5. Click **Import** to display the imported hierarchy.

Related Information

[How to export a hierarchy \[page 48\]](#)

[How to open a hierarchy \[page 49\]](#)

[How to save a version of the hierarchy \[page 49\]](#)

How to export a hierarchy

SAP Ariba solutions enable you to export XML versions of existing hierarchies for reuse.

Prerequisites

This task assumes that you are viewing the catalog hierarchy you want to export on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Procedure

1. On the **Hierarchy Editor** page, click ► **File** ► **Other** ► **Export Hierarchy** ►.
2. [Save \[page 49\]](#) or [open \[page 49\]](#) the file.

Related Information

[How to open the hierarchy editor \[page 47\]](#)

[How to import a hierarchy \[page 47\]](#)

How to open a hierarchy

A catalog hierarchy exists as either a system version or a draft version. The system version is the hierarchy currently implemented for the catalog. The draft version is a hierarchy to which you are making changes, and is not currently implemented for the catalog.

Context

You can only open a version of the hierarchy that is not currently displayed in the hierarchy editor.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Hierarchy Editor** ►.
3. Click ► **File** ► **Open** ►, and select either **System Version** or **Draft Version**.

The **Draft Version** command is available only if you have previously saved a draft version of the hierarchy.

Results

The version you opened replaces the one originally displayed in the hierarchy editor.

How to save a version of the hierarchy

When you edit a hierarchy in the hierarchy editor, you can save it as a draft version (if you want to continue working on it later), or as a system version to replace the currently implemented hierarchy.

Prerequisites

This task assumes that you are viewing a catalog hierarchy via the **Hierarchy Editor** task in the **Catalog Manager** workspace.

Procedure

- Perform one of the following actions on the **Hierarchy Editor** page:
 - To save a draft of the hierarchy, click **File > Save As > Draft Version**.
 - To implement the version of the hierarchy for the catalog, click **File > Open > System Version**.

Related Information

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

How to move categories within the hierarchy

Categories define the structure of a hierarchy. You can move a category up and down the list, within its own level of the hierarchy.

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Context

The following types of categories can be structured as follows:

Child Leaf Folder Category	Created as a child of a category, it can be a parent to other categories.
Child Leaf Category	Created as a child of a category, it cannot be a parent to other categories.
Peer Folder Category	Created at the same level as another category, it can be a parent to other categories.
Peer Leaf Category	Created at the same level as another category, it cannot be a parent to other categories.

Procedure

1. On the **Hierarchy Editor** page, click the category to move.
2. Select **Move Up** or **Move Down** to move the category up or down by one position.

Related Information

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

How to translate category names

The `cataloghierarchy.xml` file includes the names for the categories in your product hierarchy. In a multilingual configuration, these names must be internationalized so that users see the catalog in the correct language. To translate the names, use the hierarchy editor.

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Context

Note that every item under a branch must have a unique value within a locale.

Procedure

1. On the **Hierarchy Editor** page, select a language from the **Language** dropdown menu.
The menu shows the most recent languages selected. Select **Search for more** to find additional languages.
2. Click a category name and select **Translate Category Name**.
3. Enter the translated string, and click **OK**.

Related Information

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

[How to view a hierarchy in a different language \[page 52\]](#)

[How to import a language translator file \[page 53\]](#)

How to view a hierarchy in a different language

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Procedure

On the **Hierarchy Editor** page select a language from the **Language** dropdown menu.

The menu shows the most recent languages selected. Select **Search for more** to find additional languages. If the desired language is not available, you can import the language translator file.

Results

If the hierarchy has been translated to that language, the category names are displayed accordingly. If the hierarchy has not been translated, the category names are displayed as **Translation needed**.

Related Information

[How to import a language translator file \[page 53\]](#)

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

How to import a language translator file

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Procedure

1. Click **File** > **Import Language Translator**.
2. Select a language from the **Language** dropdown menu.
3. Click **Browse**, navigate to and select the `ariba.category.hierarchy.csv` file you want to import, then click **Open**.
4. Click **Import**.

Results

When the file is imported, a **Successfully imported** message is displayed.

Related Information

[How to import a language translator file \[page 53\]](#)

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

How to copy and paste categories

You can copy and paste categories from one level of the hierarchy to another.

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Procedure

1. On the **Hierarchy Editor** page, click the category, then click **Copy**.
2. Click the hierarchy level at which you want to paste the category.
3. Perform one of the following actions:
 - To make the copy a child of the selected hierarchy level, select **Paste as Child**.
 - To make the copy a peer of the selected hierarchy level, select **Paste as Peer**.

Related Information

[How to open the hierarchy editor \[page 47\]](#)

[How to open a hierarchy \[page 49\]](#)

How to create a category

Prerequisites

This task assumes that you have a catalog hierarchy open on the **Hierarchy Editor** page in the **Catalog Manager** workspace.

Procedure

1. Click an existing category that you want to use at the starting point for your new category.

For example, to create a new category as the child of an existing category, click the category you want to use as the parent. To create a new category as the peer of an existing category, click a category at the level in the hierarchy at which you want the new category to appear.
2. Click the command for the type of category you want to create (**New Child Leaf Folder**, **New Child Leaf Category**, **New Peer Leaf Folder**, **New Peer Leaf Category**).
3. Enter a name for the folder or leaf.
4. If you are creating a leaf, select a code system and enter the appropriate code.

If there are multiple codes for a leaf, use comma-separated values.
5. Click **OK**.

Related Information

[How to copy and paste categories \[page 53\]](#)

Shopping by classification systems

SAP Ariba solutions can be configured to provide support for multiple product classification systems and enable users to shop for items based on the classification systems. Users can browse the hierarchy of each classification system and search for relevant items.

When your site is configured, a **Classification System** option is displayed in the **Shop By** section of the catalog home page to enable users to browse the hierarchy of each classification system and search for relevant items.

i Note

Multiple product classification systems can be specified in BMEcat catalogs only.

SAP Ariba solutions process the information related to multiple classification codes specified in the BMEcat catalog files and generate various catalog hierarchies based on each classification system. For more information about specifying multiple product classification systems in BMEcat catalogs, see *Catalog format reference* guide.

To enable this feature, have your Designated Support Contact (DSC) submit a Service Request (SR). An SAP Ariba Customer Support representative will follow up to complete the request.

Displaying icons

To direct your spend to certain items or suppliers, you can display icons with them as visual cues to users.

A catalog has multiple attributes and the icons depend on the value of the catalog attribute. Icons associated with items display in catalog search results, requisitions, shopping carts, and purchase orders.

The SAP Ariba solution has icons defined for a few attributes, such as Green, Women/Minority Owned Business Enterprise (WMBE), and supplier's subscription tier (Platinum, Gold or Silver). You can also contact SAP Ariba Customer Support to set user-defined icons.

Icons for boolean and enumeration types are supported. The icon file should be in a zip format containing GIF files. The GIF file name format for boolean attribute should be, `typename/attributename.gif` and for enumeration attribute the format should be `typename/attributename_enumerationvalue.gif` in lowercase. The icon file size should not be more than 4kb.

i Note

Contact SAP Ariba Customer Support to set user defined icons.

Icons can be set while loading a new type from the type definitions page. Contact SAP Ariba Customer Support to load type-definition files.

Related Information

[How to create catalog views \[page 56\]](#)

How to create catalog views

The **Catalog Views** task in the **Catalog Manager** workspace allows you to restrict users' access to a catalog based on a set of constraints you define.

Context

There are two approaches you can take to defining a catalog view:

- Start with everyone having access to the entire catalog and then narrow that access based on a set of criteria.
- Start with no one having access to the catalog and then broaden that access based on a set of criteria.

If you start with full access, you then restrict that access based on group or department membership (or both), and then on one or more of the following: supplier, catalog, and commodity code. For example, you can hide items from Supplier ABC from anyone who does not belong to the **IT Manager** group.

If you start with no access, you can then broaden that access based on group or department membership, and then on one or more of the following: supplier, catalog, and commodity code. For example, you can show only the catalog from Supplier ABC to members of the **IT Manager** group.

You can create multiple views as necessary.

Note

The constraints that you define aren't applicable to PunchOut catalog items.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Choose ► **Catalog Manager** ► **Catalog Views** ►.

The **Catalog Constraints** page opens.

3. Click **Add Constraint**.
4. In the **Group** field, choose a user group to be the target of the filter you add, for example, **Catalog Approver**.

You can also filter by a department (cost center).

5. Choose the filter type:
 - **Start with view nothing, show more catalog items to the qualified users:** The catalog you specify is the only catalog the selected user group will see.
 - **Start with view nothing, show more catalog items to the disqualified users:** The catalog you specify is the only catalog shown to user groups that you did not select. So, if you selected **Catalog Approver**, groups other than **Catalog Approver** will see only the specified catalog and no others.
 - **Start with view all, hide some catalog items from qualified users:** The catalog you specify is hidden from the selected user group.

- **Start with view all, hide some catalog items from disqualified users:** The catalog you specify will be hidden from users who are not in the selected user group.
- 6. Specify the catalog to be hidden or shown to the select user group. You can specify the catalog by supplier, catalog name, kit or commodity code, or a combination of those choices.
 - **Supplier:** Members of the group/department you specified in the previous step will be able to view items from this supplier. Anyone who does not belong to the group/department you specified will not be able to see items from this supplier.
 - **Catalog:** Members of the group/department you specified in the previous step will be able to view items from this catalog. Anyone who does not belong to the group/department you specified will not be able to see items from this catalog.
 - **Kit:** Members of the group/department you specified in the previous step will be able to view items from this catalog kit. Anyone who does not belong to the group/department you specified will not be able to see items from this catalog kit. Ensure that the members of the group/department you choose also have access to view the individual items in the catalog kit.
 - **Commodity Code:** Members of the group/department you specified in the previous step will be able to view items identified by this commodity code. Anyone who does not belong to the group/department you specified will not be able to see items identified by this commodity code.
- 7. Click **Add Constraint** to implement the constraint.

Related Information

[How to create item constraints \[page 59\]](#)

Creating item constraints

Catalog managers can restrict user's access to individual items in a catalog by defining constraints based on extensible catalog fields that are mapped to master data fields.

The constraints can be defined based on extensible catalog fields that are mapped to master data fields that act as the filtering entities. For example, constraints can be defined such that certain items in the catalog are displayed only to users associated with specific procurement units or company codes.

Different filters can be created to display a different set of catalog search results based on the business scenario. For example, the set of items that are displayed to a user when performing a catalog search in the context of a requisition may be different from the set of items that are displayed in the context of a contract. Different filtering constraints can be defined for the following different scenarios where catalog search is performed:

Scenario/Context	Description
Catalog home page search (outside the context of a requisition)	User performs catalog search directly from the Catalog dashboard and there are no items in the cart. If the cart contains items that had been added previously but not checked out, then the context is a requisition scenario.

Scenario/Context	Description
Requisition	<p>User in the process of creating a requisition from the Home dashboard clicks Create > Requisition and navigates to the catalog home page.</p> <p>User performs catalog search directly from the Catalog dashboard and there are one or more items in the cart that had been added previously but not checked out.</p>
Contract	A user in the process of adding items to a contract navigates from the contract creation page to the catalog search page.
Invoice	A user in the process of adding items to an invoice navigates from the invoice page to the catalog search page.

Note

When filtering catalog data, the catalog item constraints are applied after the existing catalog filters such as catalog views and supplier-based filters are applied.

Catalog managers can also configure the filtering entity(master data field) to be displayed in the **Shop By** section of the catalog home page to enable users to further filter the catalog search results. For example, consider a catalog item constraint based on the **Ship To** field as the filtering entity. When configured, the **Ship To** field is displayed in the **Shop By** section of the catalog home page and the list of values that are displayed for this field depend on the ship to locations that the user is associated with. The user can further filter the catalog search results based on the available ship to values.

The following master data fields are available to be selected as the filtering entities by default:

Class	Fields in Generic variant	Fields in SAP variant	Fields in PeopleSoft
User	ProcurementUnit	CompanyCode PurchaseOrg ProcurementUnit	BusinessUnit
Requisition	ProcurementUnit	CompanyCode PurchaseOrg ProcurementUnit	BusinessUnit
Contract	ProcurementUnit	CompanyCode PurchaseOrg	BusinessUnit
Invoice	ProcurementUnit	CompanyCode PurchaseOrg	BusinessUnit

Note

You can also specify other master data fields (including custom fields) as filtering entities when creating catalog item constraints. These fields must be of type text and must be configured to be available for selection as filtering entities. To configure the master data fields, please have your Designated Support Contact log a service request and an SAP Ariba Customer Support representative will follow up to complete the request.

You can override the catalog filtering defined by a constraint for a specific set of users. To do this, specify a valid **Universal Access Value** based on the filtering entity. For example, consider filtering constraints based on procurement units specifying that users belonging to Procurement Unit 100 can have access only to items that are mapped to Procurement Unit 100 and users belonging to Procurement Unit 200 can have access only to items that are mapped to Procurement Unit 200 . But if you specify 200 as the **Universal Access Value**, then users belonging to Procurement Unit 200 are not restricted from viewing catalog items mapped to other procurement units.

Related Information

[How to create item constraints \[page 59\]](#)

How to create item constraints

You can create catalog item constraints for different scenarios based on the master data fields available in the User, Requisition, Contract, and Invoice classes.

Context

SAP Ariba recommends that you take note of existing catalog filtering that is available in your site configuration provided by options such as catalog views and custom filter queries and any conflicts that may arise are taken into consideration.

When creating the catalog item constraints, you can also configure the master data field used as the filtering entity to be displayed in the **Shop By** section of the catalog home page.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalog Views** ►.
3. Click the **Add Item Constraint** tab.

The page displays the list of catalog item constraints if available.

4. Click **Add Constraint** to add a new catalog item constraint.
5. Select the class that you want the constraint to be based on. For example, select **Requisition** if you want to create a constraint based on the fields available in the requisition class.

The **Add Item Constraint** page displays the list of available fields that can be selected as the filtering entities. Custom fields that are configured to be selected as the filtering entities are also displayed.

6. Identify the field that you want to specify as the filtering entity and click **Select**.

i Note

If you want your filtering to be based on a requisition line item field, use the fields listed under the **SearchConstraintLineItem** class.

The **SearchConstraintLineItem** class is displayed only if one or more requisition line item fields have been configured to be available for selection as a filtering entities.

7. From the **Catalog Field** dropdown, select the catalog field that you want to map to the filtering entity.
8. Optionally, if you want to override the catalog filtering defined by a constraint, then specify a valid **Universal Access Value** based on the selected filtering entity.
9. To display the filtering entity in the **Shop By** section of the catalog search pages, select the **Display filter in catalog home page** checkbox.
10. Optionally, for constraints based on the **Requisition** class, select the **Default from User** checkbox if you want the master data value to be defaulted from the user data.
11. Click **Add Constraint** to save your changes and create the catalog item constraint.

Related Information

[Creating item constraints \[page 57\]](#)

Preferred catalog items and preferred suppliers for non-catalog items

You can direct your organization's spend towards certain catalog items by configuring them as preferred items. And you can direct spend towards certain suppliers when procuring non-catalog items by configuring them as the preferred suppliers for non-catalog items.

Preferred catalog items

Catalog items configured as preferred items can be identified with icons associated with them in catalog search results, requisitions, shopping carts, and purchase orders. Users can also use the **Filter By** section on the left side of the catalog search results page to narrow the search results to view preferred items only.

To configure catalog items as preferred items, you must set the `Is Preferred Item` field value to `true`. Additionally, you can configure the relevance ranking designations to display the preferred items higher up in the catalog search results.

i Note

You must contact your SAP Ariba representative to run the `PushAndIndexCatalogs` task to ensure that all the catalog data available in your site is pushed to the new catalog architecture and reindexed. This task needs to be run the first time you configure one or more catalog items as preferred items.

Preferred Suppliers for Non-Catalog Items

Configuring preferred suppliers for procuring non-catalog items involves mapping suppliers to commodity codes by running the `Import Preferred Suppliers` data import task that reads from the `PreferredSupplierMap.csv` file. In the SAP variant, SAP plants can also be used in combination with commodity codes for mapping.

When selecting a supplier for a non-catalog item, the **Preferred Supplier** column in the window listing available suppliers helps users identify the preferred suppliers. A value of **Yes** in the **Preferred Supplier** column indicates that the supplier is configured as a preferred supplier based on the selected commodity code.

i Note

The column is displayed only when selecting a supplier for a non-catalog item, and only if one or more suppliers are configured as preferred suppliers in your site.

Using additional catalog item attributes

Your SAP Ariba solution supports the use of additional ordering attributes on catalog items, including prompting users to fill in additional information, prompting users to choose fields before ordering, sending specified fields to the supplier, and allowing users to choose only certain values for each field.

Partial catalog items

SAP Ariba solutions support the use of partial catalog items. Partial items are regular catalog items imported with certain fields missing.

Partial items can be thought of as being in between fully specified static catalog items (loaded through supplier catalogs or generated through contracts and procurement category definitions) and non-catalog items in which every detail must be specified by the user. With partial items, users can search for and find items that already exist in the catalog and then fill in the missing information while purchasing. The use of partial items can increase spend capture, allow more accurate and detailed reporting, reduce the number of catalog items and streamline the

process of requisition approval. Partial items are also especially useful in ordering services or customizable products.

When users search for items, the returned list of results can contain fully specified catalog items and partial items. When a partial item is added to the shopping cart, users are prompted to fill in values for certain missing fields, therefore converting the partial item into a fully-specified item on the requisition.

To create a partial item, the `IsPartial` field must be specified for each item. The `IsPartial` field allows the partially-specified items to pass validation when imported. For more information about using `IsPartial` in catalog files, see the *Catalog format reference*.

Required For Ordering attribute

Use the `isRequiredForOrdering` type attribute property to increase order accuracy and obtain information from the user when an item is ordered.

When the `isRequiredForOrdering` attribute is specified, the user must fill out the value for the fields before the requisition can be submitted.

The required-for-ordering attribute also places the value on the purchase order that is sent to the supplier. Just because a catalog item is a partial item does not mean the information the user specifies will be sent to the supplier; the `isRequiredForOrdering` attribute must also be specified for the fields.

For more information about using `isRequiredForOrdering`, see the *Catalog format reference*.

Enumeration values

You can use enumeration values to increase order accuracy for partial items by specifying the allowable values for a specific field.

When enumeration values are implemented on a required field, a dropdown menu is displayed that contains values that the user must choose from when ordering an item.

When an enumerated field also has the type attribute `IsRequiredForOrdering` set to `true`, the chosen value is sent to the supplier on the order.

Providing enumeration values makes the order process easier for the user because the values are searchable in the product catalog.

Enumeration values also allow validation of the chosen value against the allowable values for the field.

Enumeration values are specified through the `EnumerationValue` element in type definition files. For more information about enumeration values, see the *Catalog format reference*.

Displaying PunchOut items

PunchOut items are items users order directly from the supplier. Punching out means being redirected to the supplier website to order items.

A PunchOut item looks like a regular item in the catalog, except that a small arrow appears in front of the item name, and the **Add to Cart** button is typically changed to **Buy from Supplier**. Supplier sites have different flows when it comes to adding punchout items, but all sites allow users to shop for items and return to the Ariba catalog.

When a user selects a PunchOut item, the supplier's site is displayed. The user then selects items and returns to the SAP Ariba solution, where the items appear in the user's requisition or shopping cart.

[Levels of PunchOut items and filtering PunchOut Catalog Data \[page 64\]](#)

PunchOut items in the product catalog can be configured at the storefront, aisle, shelf, or item level.

PunchOut items can also be filtered so that suppliers can send individual, product-level PunchOut catalogs to multiple organizations.

[How to access catalog filters \[page 65\]](#)

To set a filter on a catalog you have to select the catalog, and then add or select filters.

[How to add a filter \[page 65\]](#)

[Other Filter Tasks \[page 66\]](#)

You can perform a series of other tasks from the catalog filter tool, including deleting, copying, publishing, modifying, and deactivating filters.

[How to configure price and availability update requests for new catalogs \[page 67\]](#)

Configuring requests for price and availability update intervals requires that you import the new catalog.

[How to configure price and availability update requests for existing catalogs \[page 68\]](#)

Configuring requests for price and availability update interval for existing catalogs requires that you select the catalog to configure.

Related Information

[Levels of PunchOut items and filtering PunchOut Catalog Data \[page 64\]](#)

[How to access catalog filters \[page 65\]](#)

Levels of PunchOut items and filtering PunchOut Catalog Data

PunchOut items in the product catalog can be configured at the storefront, aisle, shelf, or item level. PunchOut items can also be filtered so that suppliers can send individual, product-level PunchOut catalogs to multiple organizations.

Levels of PunchOut items

Store-level punchout is sometimes referred to as Level 1 PunchOut; while aisle, shelf and item (product)-level punchout is sometimes referred to as Level 2 PunchOut. Items that have been configured at store-level punchout direct the users to a single page on the supplier's site and require an additional search for the item. Level 2 PunchOut configuration allows users to see aisle, shelf or item-level results that represent different granularity in item grouping. This can help the user narrow the search for an item, and save time in searching for the item.

Level 2 PunchOut helps to direct the purchase of an approved item or group of items. Purchasing managers can talk to suppliers to create product-level punchout catalogs that direct buyers to specific types of items (such as recycled toner cartridges in preference to non-recycled, for example). This adds the purchasing manager's control over spend management.

You specify the location of PunchOut items in your product catalog hierarchy just as you do with regular catalog items.

Filtering PunchOut catalog data

You can filter PunchOut catalog data so that a supplier can send individual, product-level PunchOut catalogs to multiple buying organizations with custom prices. Suppliers create generic, second level PunchOut catalogs, that then need to be filtered to display only specific items to users.

Catalogs can be filtered based on the following attributes:

- Commodity code
- Classification domain
- Manufacturer name
- Line item key

You can set multiple filters on a catalog and set priorities for each filter. A preview tool is available to see the catalog views after the filters have been applied.

Filters need to be manually published to become active. Publishing the filter only activates the filter and does not publish the catalog. Catalog filters are specific to a catalog subscription version and take effect once a subscription is rebuilt. Only active filters get copied over to a new catalog version.


Related Information

[Catalog hierarchy \[page 46\]](#)

How to access catalog filters

To set a filter on a catalog you have to select the catalog, and then add or select filters.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Click the version of the catalog for which you want to set a filter.
4. In the **Step 1. Clean the Data** section, click the **Filter Tool** icon .

Next Steps

You can create new filters for a catalog after you access the filter tool.

Related Information

[How to add a filter \[page 65\]](#)

How to add a filter

Prerequisites

Access the catalog filter tool.

Procedure

1. On the **Catalogs - Filter** page, click the **Add** button.

2. Enter the desired filter options, explained in the following table:

For this option...	Do this...
Type of Filter	Specify whether the filter needs to include or exclude the catalog items.
Priority	Enter a value to set the priority of the filter. When you have multiple filters, the filters are applied based on their priorities.
Comments	Enter a descriptive comment for the filter.
Filtered Attribute	Specify the attribute that you want the filter to be based on.
Operation	For the attribute value chosen in the Filtered Attribute chooser, specify whether the filtered results belong to the attribute value or not.
Values	Specify the values for the filtered attribute.

For example, to create a filter that displays only items from manufacturer ABC: Select **Include Items**, select **Manufacturer Name** as the filtered attribute, select **In** as the operation, and specify **ABC** in the values field.

Note

You can get the same results by selecting **Exclude Items** and the **Operation** as **Not In**.

3. Click **Save Filter**.

Results

Once the filter is created, its status is set to **Draft Activating**.

Related Information

[How to access catalog filters \[page 65\]](#)

[Other Filter Tasks \[page 66\]](#)

Other Filter Tasks

You can perform a series of other tasks from the catalog filter tool, including deleting, copying, publishing, modifying, and deactivating filters.

The following table lists and describes filter tasks.

Task	Description
Delete a filter	<p>Select a filter and click Delete.</p> <p>Only filters in Draft Activating or Deactive states can be deleted.</p>
Copy a filter	<p>Select a filter and click Copy.</p> <p>This action creates a copy of the selected filter. The new filter moves to the Draft Activating state. You can only copy one filter at a time.</p>
Publish a filter	<p>Select a filter and click Publish.</p> <p>Only filters in Draft Activating or Draft Deactivating states can be published. Publishing a filter in Draft Activating state activates the filter. Publishing a filter in Draft Deactivating state deactivates it.</p>
Modify a filter	<p>Select a filter and click Modify.</p> <p>Only a filter in Draft Activating state can be modified. To modify a filter in other states, make a copy of the filter and modify the new filter. You can only modify one filter at a time.</p> <div> <p>i Note</p> <p>Delete the original filter after you copy and modify a filter.</p> </div>
Deactivate a filter	Select a filter and click Deactivate . Only active filters can be deactivated.

Related Information

[How to access catalog filters \[page 65\]](#)

How to configure price and availability update requests for new catalogs

Configuring requests for price and availability update intervals requires that you import the new catalog.

Context

For some catalog items, the price, availability and lead time may change frequently. To counteract any potential issues, SAP Ariba solution allows you to request the latest price and availability updates from suppliers at frequent intervals.

When a user punches out to a supplier site from a product-level punchout catalog, the information in the supplier's site may be different from that in the product-level punchout catalog of the SAP Ariba solution.

You can configure the frequency at which the request needs to be sent to the supplier (for example, daily, weekly, and monthly) on the **Import New Catalog** page for new catalogs or the catalog summary page for existing catalogs.

i Note

You can see the buttons for configuring or requesting updates only for suppliers that support this functionality.

A request can be sent manually for each catalog subscription or for all subscriptions together. After each update, the catalog index runs.

i Note

You can request the price and availability updates for product-level punchout catalogs only.


Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Click **Import New Catalog**.
4. Locate the **Schedule Price/Availability Update** field, and click **Configure**.
5. Specify the frequency at which you want to synchronize the price and availability information for this catalog.
 - When you select **Weekly**, you can further specify the days of the week that the request needs to be sent.
 - If you select **Days** or **Hours**, specify the number of days or hours.
 - Select **Off** if you do not want to request updates.
6. Click **OK**.

How to configure price and availability update requests for existing catalogs

Configuring requests for price and availability update interval for existing catalogs requires that you select the catalog to configure.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Click on the version of the catalog.
4. Under **Step 1. Clean the Data**, click the **Summary tool** icon .

5. Locate the **Schedule Price/Availability Update** field, and click **Change**.
6. Specify the frequency at which you want to synchronize the price and availability information for this catalog.

When you select **Weekly**, you can further specify the days of the week that the request needs to be sent.
7. If you select **Custom**, specify the number of days.
8. Click **OK**.

Displaying catalog kits and statuses

Catalog items can be grouped into **catalog kits**. Catalog kit statuses identify the current state of the kit.

Displaying catalog kits

Catalog kits are items in the product catalog that are bundled together in a single unit. Catalog kits contain associated or related items and are created in the **Catalog Manager** workspace.

When ordering from the product catalog, users order the catalog kits as one item. If the individual items from a catalog kit are not marked as required items, the user can also view and delete the individual items before submitting the requisition. Each catalog kit is assigned its own ID, description, and supplier part # because the kit itself is an individual item in the product catalog.

When catalog items bundled in a kit become inactive, the items can no longer be ordered. Items become inactive if they are deactivated or if they contain a past expiration date. The **Refresh Kits From Catalog Items** scheduled task when run sends a notification message to users who belong to the **Customer Catalog Manager** group.

For more information about this scheduled task, see [Scheduled Tasks \[page 156\]](#).

Catalog kits cannot be loaded through a catalog file import. They must be created manually.

Some catalog items cannot be bundled into catalog kits, including:

- Existing kits
- BMEcat catalog items
- Non-catalog items
- Non-catalog items created by no-release contracts
- PunchOut items

BMEcat catalogs support associating an item with other mandatory items, which are added to the shopping cart together. Mandatory items function in the same way as catalog kits do, by grouping a set of items together, but they must be defined in the catalog file before import.

i Note

To make changes to an existing kit that cannot be edited, you must copy it to create a new version of the kit.

Catalog kit statuses

The following table lists the various statuses that are applied to catalog kits.

Status	Description
Creating	The catalog kit is being created. When the catalog kit is saved the status changes to Active .
Active	<p>The catalog kit has been activated. Kits are active after they are saved.</p> <p>Do not change the supplier and supplier part number or the new catalog kit will not be recognized as a new version of the original kit.</p>
Retired	A catalog kit with the same supplier and supplier part number has been activated. When a new version of a catalog kit (with the same supplier and supplier part number) is activated, the older version is automatically retired. The retired catalog kit continues to appear on the Catalog Kits page. Deleted kits do not appear on the Catalog Kits page.
Expired	The catalog kit is activated, but its expiration date has passed.

Related Information

[Searching for a Catalog Kit \[page 70\]](#)

[Editing Kits \[page 72\]](#)

How to search for a catalog kit

You can search for existing catalog kits using the ► **Catalog Manager** ► **Catalog Kits** ► task.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalog Kits** ►.
3. To change which filters are available, click **Add/Remove Search Filters**, select the filters to display, and click **OK**.
4. Enter or select a value for each filter that you want to use, and click **Search**.

Related Information

[How to create a new catalog kit \[page 71\]](#)

[How to edit kits \[page 72\]](#)

[How to copy a kit \[page 72\]](#)

[How to delete a kit \[page 73\]](#)

How to create a new catalog kit

You can create a new catalog kit from the ► **Catalog Manager** ► **Catalog Kits** ► task.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalog Kits** ►.
3. Click **Create New**.
4. On the **General** tab, supply the following information:

Option	Task
Short Description	Enter a short description of the kit.
Description (required)	Enter a comprehensive description of the kit.
Language	Select the language in which the kit is displayed.
Kit Part ID (required)	Enter a part ID for the kit.
Kit Aux. Part ID	Enter an auxiliary part ID for the kit.
Expiration Date	Select the expiration date for the kit.
Commodity Code (required)	Select the commodity code for the kit.
Unit of Measure	Select the unit of measure for the kit.
Tier	Select the tier of the kit.
Default Relevance	Select the default relevance for the kit.

5. On the **Kit Contents** tab, select a supplier for the items in the kit.
If you want the kit to contain items from multiple suppliers, leave **Kit Supplier** as **Unspecified**.
6. Click **Add Items** and select items from the product catalog.
7. Click the **Summary** tab.
8. View the total price of the catalog kit, and view or change the currency value.
9. In the **Kits Need Approval** field, select **Yes** to get the kit approved.
10. Click **Save**.

Related Information

[How to edit kits \[page 72\]](#)

[How to copy a kit \[page 72\]](#)

[How to delete a kit \[page 73\]](#)

How to edit kits

You can edit an existing catalog kit.

Procedure

1. Use the search filters to generate the list of kits you want to edit.
2. Click **Edit** for the kit you want to edit.
3. Use the **General** tab to edit the expiration date.
4. Use the **Kit Contents** tab to edit the items in the kit.
5. Check the checkbox for an item, then click **Copy** to copy the item.
6. Check the checkbox for an item, then click **Delete** to delete the item.
7. Click **Add Items** to open the catalog and add items to the kit.
8. Click **Save**.

Related Information

[How to search for a catalog kit \[page 70\]](#)

[How to copy a kit \[page 72\]](#)

[How to delete a kit \[page 73\]](#)

How to copy a kit

If you want to make changes to an existing catalog, you must first copy the kit.

Context

When you create a new, edited version of an existing kit, you need to use the same supplier and supplier part number. If you don't, the new kit will not be recognized as a copy of the original kit.

Procedure

1. Use the search filters to generate the list of kits you want to edit.
2. Click **Copy** for the kit you want to copy.
3. Make your changes using the same methods you used to create the kit.
4. Click **Save**.

Related Information

[How to search for a catalog kit \[page 70\]](#)

[How to create a new catalog kit \[page 71\]](#)

How to delete a kit

You can delete catalog kits that are no longer needed.

Procedure

1. Use the search filters to generate the list of kits you want to edit. For more information, see [Searching for a Catalog Kit \[page 70\]](#).
2. Check the checkbox for each kit you want to delete, then click **Delete**.
3. Click **OK**.

Related Information

[How to search for a catalog kit \[page 70\]](#)

How to change visibility and order settings for catalog display lanes

You can configure catalog display lanes using the ► **Catalog Manager** ► **Catalog Display Customization** ► task. Display lanes are grouped catalog categories, such as **Favorites**, that users can view easily on the **Catalog Home** page.

Prerequisites

The configuration parameter `Application.Catalog.DisplayLaneConfiguration` must be set to **Yes**. Members of the **Customer Administrator** group can set this parameter.

You must be a member of the **Customer Catalog Manager** group to configure catalog display lanes.

Context

When you configure display lanes, you determine which display lanes are available to users and which display lanes are hidden. You cannot hide all display lanes; you must keep at least one lane available. You can also set the order in which the lanes are displayed.

Note

If your SAP Ariba system is configured for multi-ERP support (multiple, integrated procurement or invoicing sites), the child sites inherit the configuration settings for display lanes from the parent site.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalog Display Customization** ►.
3. On the **Catalog Home Page** tab, in the **Display Lanes** section, click **Change**.
4. Perform any of the following actions:
 - In the **Visible** column, check the checkboxes for the display lanes that you want to make available to users.
 - In the **Display Order** column, for the visible display lanes, set the display order by selecting values from the dropdown menus. For example, to display the **Favorites** lane at the top of users' **Catalog Home** page and the **Recently Viewed Items** lane in the second position, select **1** for **Favorites** and **2** for **Recently Viewed Items**.
5. When you are finished configuring display lanes, click **Save**.

Results

The next time users access the **Catalog Home** page, the display lanes reflect the new settings.

Catalog display lane for buyer-promoted items

In SAP Ariba solutions, you can increase the visibility of specific catalog items by displaying them on the catalog home page in a **Promoted Items** display lane on the **Catalog Home** page, enabling users to quickly find and order the items.

Organizations can include any catalog items in the **Promoted Items** display lane, for example:

- Standard equipment
- Commonly purchased items
- Equipment and supplies for new employees

This feature is disabled by default. To enable it, have a member of the **Customer Administrator** group set the configuration parameter `Application.Catalog.PromotedItems` to Yes.

This feature has no effect on catalog searches, relevance, equivalent words, or tiers. It affects the **Promoted Items** display lane only.

Workflow for items in the Promoted Items display lane

1. SAP Ariba enables this feature for the site.
2. The next time users log in, the Promoted Items display lane appears at the top of their Catalog Home page. Until the catalog manager promotes items, the display lane shows the message **There are no promoted items**.
3. The catalog manager configures items to appear in the Promoted Items display lane, either by editing the catalog file and importing a new version, or by using the Edit Content tool to edit each item.
4. Once the new version of the catalog goes through the usual approval process, users see the promoted items in the Promoted Items display lane in the configured order the next time they go to the catalog home page. Users can add promoted items to the cart with a single click.

[Configuring promoted items \[page 76\]](#)

For catalog items, you can configure which items appear in the **Promoted Items** display lane and the order in which they appear. There is no limit to the number of items you can promote.

[How to promote catalog items \[page 78\]](#)

You can promote specific catalog items to appear in the **Promoted Items** display lane on the **Catalog Home** tab.

Related Information

[Configuring promoted items \[page 76\]](#)

Configuring promoted items

For catalog items, you can configure which items appear in the **Promoted Items** display lane and the order in which they appear. There is no limit to the number of items you can promote.

CIF catalog files support a field named `Promotion Rank`. The cXML file format supports an extrinsic element named `PromotionRank`. A **Promotion Rank** field is also available for items via the **Edit Content** tool in the **Catalog Manager** workspace of Ariba Administrator.

Note

Although this feature is for buyers to configure, suppliers are not prohibited from configuring promoted items in their catalog files. If you see unexpected results in the **Promoted Items** display lane, check the catalog files to see if suppliers have set `Promotion Rank` values, and override those values as needed.

The `Promotion Rank` field is applicable only on buyer sites that are configured to show the **Promoted Items** display lane. If the display lane is hidden, the `Promotion Rank` field has no effect.

This field has no effect on catalog searches, relevance, equivalent words, or tiers. It affects the **Promoted Items** display lane only.

The `Promotion Rank` field takes an integer value. The value defines two things:

- Whether the item appears in the **Promoted Items** display lane. A value of 1 or greater makes the item a promoted item. An empty or negative value or a value of 0 (zero) means the item is not a promoted item.
- Where the item is displayed among all the other promoted items. Promoted items are displayed in ascending order according to the integer values defined, beginning with 1. In the case of duplicate values, the items are considered to have the same promotion rank and are displayed together in random order.

For example, suppose you configure 12 items with promotion ranks as follows:

Item	Promotion Rank
A	1
B	1
C	1
D	0
E	2
F	4
G	3
H	5

Item	Promotion Rank
I	5
J	""
K	5

Using the configuration in the preceding table, the configured items appear in the **Promoted Items** display lane as follows:

- Items A, B, and C are displayed in the first row in random order.
- Items E, F, G are displayed in the second row in ascending order according to their integer values: E, G, F.
- Items H, I, and K are displayed next, in random order.
- Items D and J are not displayed.

Following is a CIF code example using Promotion Rank:

Sample Code

```
CIF_I_V3.0
LOADMODE: F
SUPPLIERID_DOMAIN: buyersystemid
COMMENTS: Generated on Tue Jun 30 11:29:49 PDT 2015
UNUOM: TRUE
CURRENCY: USD
CHARSET: UTF-8
FIELDNAMES: Supplier ID, Supplier Part ID, Manufacturer Part ID, Item
Description, SPSC Code, Unit Price, Unit of Measure, Lead Time, Manufacturer
Name, Supplier URL, Manufacturer URL, Market Price, Currency, PunchOut Enabled,
Supplier Part Auxiliary ID, Language, Parametric Name, Parametric Data,
Expiration Date, Effective Date, Classification Codes, Territory Available,
Short Name, IsPartial, IsInternalPartId, Delete, Image, Thumbnail, InKitOnly,
PunchoutLevel, DefaultRelevance, Price Unit Quantity, Price Unit, Unit
Conversion, Price Unit Quantity Description, Promotion Rank, hazardousmaterials,
green, bestprice
DATA
"sid496","NEWHEIRARCHYabc123","abc123","Adapter SUN Monitor 4-BNCF/
13W3M",,"44","EA","3","Hallmark Cables","config/SampleImages/
hallmark_cables.html","config/SampleImages/
hallmark_cables.html","44","USD","false",,"en_US",,,,,,"{UNSPSC=1410;}",,,,,,"false
",,,,,,,,,,2,,,
```

In cXML, promoted items are declared with the extrinsic tag within the ItemDetail element:

Sample Code

```
<Extrinsic name="PromotionRank">2</Extrinsic>
```

Related information

For information about catalog file formats, see the *Catalog format reference*.

For information about importing catalog files, see the *Catalog administration guide for buyers*.

Related Information

[How to promote catalog items \[page 78\]](#)

How to promote catalog items

You can promote specific catalog items to appear in the **Promoted Items** display lane on the **Catalog Home** tab.

Prerequisites

The configuration parameter `Application.Catalog.PromotedItems` must be set to Yes. Members of the **Customer Administrator** group can set this parameter.

You must be a member of the **Customer Catalog Manager** group.

Context

This procedure explains how to configure promoted items by editing the catalog CIF or cXML file. Alternatively, you can use the **Edit Content** tool available in the **Catalog Manager** workspace of Ariba Administrator.

Procedure

1. On the dashboard, click **Manage > Core Administration**.
2. Select **Catalog Manager > Catalogs**.
3. Find the catalog that contains the items you want to promote, and export the latest version to a CIF or cXML file.
4. Open the exported CIF or cXML file.
5. For each item that you want to promote:
 - If the file is a CIF file, enter an integer of 1 or greater in the `Promotion Rank` column. The exact integer determines the display order. Duplicate values are allowed.
 - If the file is a cXML file, enter the following in the `ItemDetail` element, where `n` is an integer of 1 or greater: `<Extrinsic name="PromotionRank">n</Extrinsic>`
6. Save the file.
7. In Ariba Administrator, import the file into your SAP Ariba solution.

Results

The next time users view the **Catalog Home** page, the **Promoted Items** display lane includes all the promoted items in the configured display order. The display lane shows two rows of items at a time (eight items). Users can expand it to show up to 10 rows (40 items) and can page through the remaining items.

Related Information

For information about catalog file formats, see the *Catalog format reference*.

For information about importing catalog files, see the *Catalog administration guide for buyers*.

Cataloging favorite items in a catalog

In SAP Ariba solution sites, buying organizations can choose how users set, view, and work with favorite items in the catalog: the original favorites feature or the enhanced favorites feature.

With the original favorites feature (which is enabled by default), the **Favorites** display lane requires users to put favorite items in specific folders, and users cannot add favorite items directly to the cart from the **Favorites** display lane.

The enhanced favorites feature makes catalog favorites more efficient to use. Users can add favorite items to the cart directly from the **Catalog Home** page, mark items as favorites with just one click, and manage their favorites more easily.

When the enhanced favorites feature is enabled, users of the SAP Ariba Catalog solution can save shopping cart items and quantities to a folder in **Favorites**. They can then add the contents of the entire favorite folder to their shopping cart directly from the **Catalog Home** page, which enables them to reorder the same set of items quickly without having to fill out item quantities each time. (Only catalog items are saved to the favorite folder; non-catalog and punchout items are not.)

The enhanced favorites feature is disabled by default. To enable it, have a member of the **Customer Administrator** group set the configuration parameter `Application.Catalog.EnhancedFavorites` to Yes.

Limitations

Users can share favorite folders but cannot share individual favorite items. When sharing, users must select the groups to which they want to grant access to the folder.

Users cannot manage multiple favorite folders at once or drag items from one folder to another.

Backward Compatibility

When the the enhanced favorites feature is enabled:

- Favorite items that were previously stored in the default favorite folder are listed as individual items in the **Favorites** display lane.
- Public favorite folders that had no group restrictions become shared folders that all existing groups can access.

[Changes to the User Interface with Enhanced Favorites \[page 80\]](#)

The enhanced favorites feature includes changes to item display within search results and the item details page, changes to the **Favorites** display lane, and a new way to manage favorites.

[Enhanced favorites user interface in SAP Ariba Catalog \[page 81\]](#)

When the enhanced favorites feature is enabled, SAP Ariba Catalog solution users see changes in the shopping cart page and the **Favorites** display lane.

Related Information

[Changes to the User Interface with Enhanced Favorites \[page 80\]](#)

[Enhanced favorites user interface in SAP Ariba Catalog \[page 81\]](#)

Changes to the User Interface with Enhanced Favorites

The enhanced favorites feature includes changes to item display within search results and the item details page, changes to the **Favorites** display lane, and a new way to manage favorites.

Changes to Item Listings in Catalog Search Results and Item Details

Originally, favorite items were indicated by an icon placed below the item description. The icon looked like a folder with a star in the middle.

When the enhanced favorites feature is enabled, a star icon ★ is placed before the **My Favorite Items** indicator.

When a user adds an item to **Favorites**, the **Add to Favorites** link changes to **My Favorite Items**, and an **Edit** link appears. Users can click the **Edit** link to move the item to a folder or to remove the item from **Favorites**.

Changes to the Favorites Display Lane

If the catalog includes item images, the image associated with a favorite folder is the image for the first item in the folder.

Favorite folders are indicated by a border around the image, whereas individual favorite items have no border around the image.



In the **Favorites** display lane, users can hover over a favorite and add the item or folder contents directly to the cart using the **Add to Cart** button in the pop-up window that is displayed.

For favorite folders, hovering over the folder displays the total number of items in the folder, lists the first five items, and enables the user to view or manage folder contents, in addition to displaying an **Add to Cart** button.

The **Favorites** display lane is no longer limited to 12 favorites. The new limit is 120.

Changes to Managing Favorites

Originally, users managed favorites via a **View and manage favorites icon** on the catalog toolbar. That icon is not available when the Enhancements to Catalog Favorites feature is enabled. Instead, users can hover over a favorite folder on the **Catalog Home** page and click the **Manage all** link in the pop-up window. A page displays all the items in the folder. Users can click an item link to see details about the item. The page for managing a folder also includes options for renaming and deleting the folder and for deleting items from the folder.

For users who belong to the **Customer Catalog Manager** group, the page for managing a folder includes options for sharing the folder with other groups (originally the **Public To** option), and allowing users in those groups to add and delete items.

When the Enhancements to Catalog Favorites feature is enabled, users cannot move items from one folder to another by dragging the items on the **Organize Favorites** page. To move an item between folders, the user edits the **My Favorite Items** setting for the item in either search results or detail view.

Enhanced favorites user interface in SAP Ariba Catalog

When the enhanced favorites feature is enabled, SAP Ariba Catalog solution users see changes in the shopping cart page and the **Favorites** display lane.

- The shopping cart page now includes a link to save cart contents to a folder in **Favorites**. If cart contents were already saved in a folder, the link indicates the most recent folder name.
- In the **Favorites** display lane on the **Catalog Home** page, folders created from shopping carts include an **Add to Cart** button, enabling users to add the folder contents to the current cart.

Limitations

- For partial items, the quantities are included in the favorite folder, but other partial item details are not.
- When users save cart contents to a favorite folder, non-catalog and punchout items are not included.
- For favorite folders created by saving cart contents, users cannot add items or modify item quantities directly in the folder. They can, however, make changes by adding the folder to a cart, editing the cart, and saving the changes back to the folder.

Custom content on the catalog home page

SAP Ariba solution sites can be configured to enable customer catalog managers to add customized content to the **Note** pane on the **Catalog Home** page. Content can be published in multiple languages to ensure that users view content in their preferred language.

This feature is disabled by default. To enable it, have your site's customer administrator set the self-service parameter `Application.Catalog.NoteContentConfiguration` self-service parameter to **Yes**.

Displaying custom content on the **Catalog Home** page allows catalog administrators to display internal news, announcements, and help content to users.

Note pane on the catalog home page

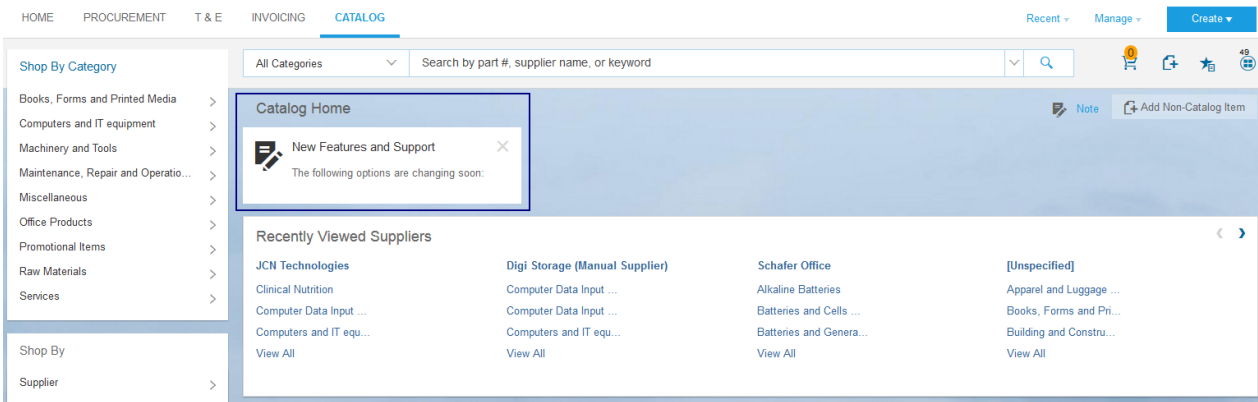
You can add headlines to content and use a Rich Text Format editor to customize text.

i Note

The Rich Text Format editor does not provide the ability to embed HTML links with text content. However, you can create text with HTML links in a Microsoft Word document and paste the content into the Rich Text Format editor in the SAP Ariba solution. The embedded HTML links render correctly when the note is published.

You can configure custom content to expire on a specific date, enabling you to control when the custom content no longer appears on the **Catalog Home** page. If you specify a date when the custom content will expire, SAP Ariba sends a reminder notification to the members of the **Customer Catalog Manager** group 24 hours before the content expires.

The following figure illustrates how users view custom content on the **Catalog Home** page. Clicking the **Note** link on the right side of the **Catalog Home** page collapses and expands the **Note** pane.

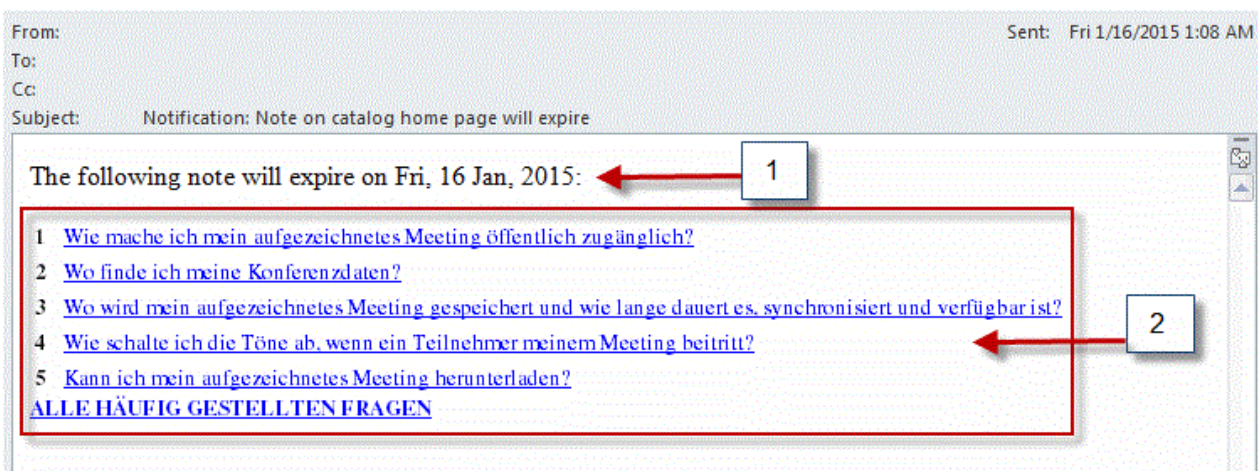


Users can choose to minimize and expand the **Note** pane and the Note pane will stay collapsed or expanded based on the user's choice during the session. If users minimized the Note pane, it will remain minimized in subsequent sessions unless new custom content is published. In that case, when users log in the next time, the **Note** pane is expanded to ensure that the new content is visible to all users.

Email notifications about custom content expiration

By default, SAP Ariba sends an email reminder to users of the **Customer Catalog Manager** group 24 hours before custom content on the **Catalog Home** page expires. Your customer administrator can change the default by setting the `Application.Catalog.NoteExpirationReminderDays` parameter to a value between 1 and 7 to give users more time to act.

The following graphic is an example of the expiration reminder message for content created with the Rich Text Format editor:



The expiration reminder message includes the following information:

1. The date the content expires
2. The content that is currently displayed on the **Catalog Home** page or the RSS URL

Related Information

[How to create or edit catalog home page custom content \[page 84\]](#)

How to create or edit catalog home page custom content

If you're a member of the **Customer Catalog Manager**, you can create or edit custom content on the catalog home page.

Prerequisites

The option to add or edit custom content is only available if your customer administrator has set the `Application.Catalog.NoteContentConfiguration` parameter to Yes.

You must be a member of the **Customer Catalog Manager** group.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
Ariba Administrator opens.
2. Select **Catalog Manager** > **Catalog Display Customization**.
The **Catalog Display Customization** page displays.
3. Click **Note** to expand the **Note** section.
4. Click **Add** to add new content or **Edit** to change existing content.
5. Choose one of the following options:
 - a. Click **Text** to use the Rich Text Format editor.
 - b. Click **RSS** to enter a URL for your RSS feed.
6. Choose a language from the **Language** dropdown menu to enter translated content for that language.
A list of the languages for which you enter translated content display in the **Saved Languages** field.
7. Enter a headline and create your content.
8. Enter the date on which you want your content to expire. You must enter a date that occurs in the future. Do not enter a date if you do not want the content to expire on a specific date.
9. Click **Save**.

Displaying catalog item descriptions as formatted text

Catalog item descriptions can be displayed as formatted text in the item details pages of the SAP Ariba solution. Formatting options such as bold and italic font styles, paragraphs, line breaks, and lists are supported in CIF, cXML, and BMEcat catalog files.

The following formatting options are supported:

- paragraphs
- line breaks
- boldface font
- italic font
- ordered list
- unordered list

The item descriptions are displayed as formatted text only in the item details and compare items pages in SAP Ariba solutions, and are displayed as plain text (without the HTML tags) in all other pages where catalog item descriptions are displayed. For example, in the catalog search results pages, and in purchase requisition and other related documents, the item descriptions are displayed as plain text.

This feature is applicable both to catalogs that are imported to SAP Ariba solutions locally, as well as catalogs that are downloaded from Ariba Network when the [Ariba Network Full Subscription Synchronization](#) scheduled task is run.

Catalog creators can use HTML tags to format the contents of the item description fields in catalog files. CIF, cXML, and BMEcat catalog file formats support the following HTML tags:

Formatting option	HTML tags	Description
Paragraph	<p></p>	Defines a paragraph.
Line breaks	 	Inserts a single line break.
Boldface font		Defines bold text.
Italic font	<i></i>	Defines italics text.
Ordered list		Defines an ordered list.
	<div>i Note Attributes are not supported.</div>	
Unordered list		Defines an unordered list.
	<div>i Note Attributes are not supported.</div>	

i Note

In cXML catalog files, the item description data must be enclosed within a CDATA section. For example, `<![CDATA[This is the description of the item.]]>`

Consider the following when creating your catalog files:

- All invalid and unsupported tags will be converted to and displayed as plain text in the user interface.
- SAP Ariba solutions ignore supported HTML tags when the catalog index is rebuilt, but the unsupported tags are indexed and will be displayed in catalog search results as normal text.
- Ensure that you add necessary spaces and punctuation to the item descriptions. No spaces are added when the HTML tags are stripped to display the descriptions as plain text in the catalog search results and other pages.
- The HTML tags are retained when catalogs are exported from SAP Ariba solutions.
- The HTML tags are also retained when catalog data is extracted in JSON format from SAP Ariba solutions.
- The HTML tags are also retained in all punchin request and response documents.

Related Information

[How to configure the visibility settings of the item description in catalog search results \[page 86\]](#)

How to configure the visibility settings of the item description in catalog search results

SAP Ariba solution sites can be configured to enable customer catalog managers to hide the item descriptions from being displayed in the catalog search results pages.

Prerequisites

Your site must be configured to enable configuration of catalog search options through the site configuration option `Application.Catalog.ExtensibleTypeAttributeConfiguration`, which SAP Ariba sets for you.

The configuration parameter `Application.Catalog.EnableDescriptionInSearch` must also be set to `Yes`.

You must be a member of the Customer Catalog Manager group to configure the visibility settings of the **Item Description** field in catalog search results

Context

This feature is disabled by default. To enable it, have your site's customer administrator set the self-service parameter `Application.Catalog.EnableDescriptionInSearchConfiguration` self-service parameter to **Yes**.

To use this feature, the `Application.Catalog.ExtensibleTypeAttributeConfiguration` site configuration parameter must be enabled for your site. SAP Ariba sets this parameter for you.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Select **Catalog Manager** > **Catalog Display Customization**.
3. On the **Fields** tab, find the **Description** field, and click **Edit**.
4. Uncheck the **Enabled** checkbox for the **In Search Results** property to hide the **Description** field from being displayed in the catalog search results page.

The field is enabled to be displayed by default.

5. Click **Save** to save your changes.

Displaying inventory items

Inventory items are items in your catalog that contain additional inventory-related details of items in a warehouse. Users can reserve inventory items in the warehouse for withdraw at a later date by creating reservation documents. Inventory items are applicable only to sites integrated with SAP ERP.

The SAP ERP system allows users to reserve inventory items in the warehouse for withdraw at a later date. Users can check the inventory details such as, the quantity of the stock available at plant level and storage-location levels before placing an order. Your site can be configured to import the inventory details of warehouse items from the SAP ERP systems and display these details to users in your site's catalog user interface.

CIF catalogs containing inventory items are created in the SAP ERP system after extracting data from Purchase Information records. The SAP Ariba Cloud Integration Gateway sends these catalogs to SAP Ariba Procurement solutions through the Ariba Network. The catalogs are downloaded to the SAP Ariba solution when the Ariba Network Full Subscription Synchronization scheduled task is run. They are then published after validation, approval, and activation. A scheduled task is run to fetch details of inventory items from the SAP ERP system (through the SAP Ariba Cloud Integration Gateway, add-on for SAP ERP) and synchronizes the data between the two systems.

Workflow of fetching inventory items from SAP ERP and displaying them in SAP Ariba Procurement solutions

The end-to-end workflow for checking the details of inventory items in SAP Ariba Procurement solutions and reserving them includes the flow of data between the SAP ERP system, SAP Ariba Cloud Integration Gateway, Ariba Network, and the SAP Ariba procurement solution.

Checking the details of inventory items in SAP Ariba Procurement solutions and reserving them involves the following high-level steps:

1. An SAP Ariba Customer Support representative performs the following tasks:
 - enables the Inventory Service for your site by setting a site configuration option.
 - sets a site configuration option for the SAP Ariba solution to identify the catalogs that contain inventory items.
 - sets a site configuration option for the SAP Ariba solution to support plant-based defaulting.
 - creates the following custom catalog fields (supplemental attributes) to enable inventory related information to be consumed and displayed in the catalog user interface:
 - **Plant**
 - **Storage Locations**
 - **Material Number**
 - **Material Group**
 - **Stock Identifier**
2. An administrator configures the SAP Ariba Cloud Integration Gateway to support checking the inventory details.
3. The administrator configures the SAP Ariba Cloud Integration Gateway to integrate catalog data from an SAP ERP system to Ariba Network seamlessly.
4. Catalogs containing inventory items are sent from the SAP ERP system to Ariba Network through the SAP Ariba Cloud Integration Gateway.
5. The catalogs are downloaded to the SAP Ariba solution when the **Ariba Network Full Subscription Synchronization** scheduled task is run. They are then published after validation, approval, and activation.
6. The **Upload MRO catalog to IMS** scheduled task that runs every 30 minutes, uploads the catalogs to the Inventory Service.
7. A scheduled job on the Inventory Service periodically checks the SAP ERP system (through the SAP Ariba Cloud Integration Gateway, add-on for SAP ERP) for the details of inventory items.
8. A user in the process of procuring an inventory item, searches the catalog. The quantity of stock available is displayed in the catalog search results page.
9. User clicks **Select** to view the inventory item details. The item details page displays the inventory details such as, **Plant**, **Storage Locations**, **Material Number**, **Material Group**, and **Stock Identifier** by default. These fields can also be configured to be displayed in the catalog search results pages.
10. User clicks **Specify quantity** to specify the required quantity. A pop up displays the various storage locations and the quantity of stock available in them.
11. User specifies the quantity to be reserved from each storage location individually and clicks **Add to cart** to add the items to the cart. The cart contents pop up menu displays the items from each storage location as a separate line item.
12. User clicks **Review Cart** to review the items added to the cart. The inventory items are displayed under the new **Inventory items** tab.

13. User submits the purchase requisition for approval.
14. After the purchase requisition is fully approved, one or more reservation documents are created.
The reservation documents are created by grouping the inventory items based on the accounting type and the date by which the items are needed.
15. The reservation request for inventory items is sent to SAP ERP to confirm the reservation.

Inventory items in the catalog user interface

- In the catalog search results and item details pages, the quantity of stock available of inventory items is displayed by default.
- Other inventory details such as, Material Number, Material Group, Plant, Storage Locations, and Stock Identifier are displayed by default in the catalog item details page. They can also be configured to be displayed in the catalog search results page.
- A new Specify quantity button is now displayed for inventory items in the item details page.
- When users click Specify quantity, a popup displays the various storage locations and the quantity of stock available in them.
- Users can specify the quantity that they want to reserve from each storage location individually, and click Add to cart to add the items to the cart.
- When users add items from multiple storage locations to the cart, the cart contents popup menu displays the items from each storage location as a separate line item.
- In the cart pages, inventory items are now displayed under a new Inventory items tab. Non-inventory items are displayed under the Catalog items tab.

Topics about Managing Catalogs

[How to deactivate a catalog \[page 90\]](#)

If you no longer want the items in a catalog to be visible to users, or if you need to edit an active catalog, you must deactivate that catalog in Ariba Administrator.

[Editing catalogs \[page 91\]](#)

In most cases, you should not edit a catalog directly. Instead, you should inform the supplier that there are errors and ask for an updated version of the catalog. However, if you need to activate the catalog immediately and it is a CIF or cXML catalog, you can edit it while you're waiting for the updated version.

[How to revalidate catalogs \[page 94\]](#)

When you import a catalog, either manually or automatically, the catalog is automatically validated. You can, however, revalidate a CIF or cXML catalog if it is not activated. This is particularly useful after you have edited the catalog.

[How to export catalogs \[page 95\]](#)

You can export a CIF or cXML catalog to a file so that you can edit the file in any text editor.

[Deleting catalogs \[page 96\]](#)

You can delete entire catalogs so that their items no longer appear in the catalog. You can also delete all versions of a catalog but leave the subscription intact, which is useful when you want to clear out previous versions.

[Adjusting mappings \[page 97\]](#)

During the validation and correction process, you may need to adjust the mappings for commodity codes, units of measure, and currency. The implementation staff initially defines these mappings with integration worksheets.

How to deactivate a catalog

If you no longer want the items in a catalog to be visible to users, or if you need to edit an active catalog, you must deactivate that catalog in Ariba Administrator.

Context

You cannot edit or add new items to a catalog that has the status of **Activated**.

When you deactivate a full catalog that has incremental updates, all the incremental catalogs are also deactivated. Similarly, when you deactivate an incremental catalog, the full-load catalog and all related incremental catalogs are deactivated as well.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.

Initially, all catalogs for the partition or site are displayed on the **Catalogs** page. You can optionally use the search filters to narrow the list.

3. Click the checkbox for the catalog you want to deactivate, then click **Deactivate**.

The **Deactivate Catalogs** page opens.

4. On the **Deactivate Catalogs** page, click **Deactivate**.

Results

When the status changes to **Deactivated**, all the items in the catalog are deactivated and no longer available for users to search or order.

Related Information

[How to add an item to a catalog \[page 92\]](#)

[How to delete or edit items from a catalog \[page 93\]](#)

Editing catalogs

In most cases, you should not edit a catalog directly. Instead, you should inform the supplier that there are errors and ask for an updated version of the catalog. However, if you need to activate the catalog immediately and it is a CIF or cXML catalog, you can edit it while you're waiting for the updated version.

Obtaining a corrected version helps you avoid the same errors in a later import of the catalog. Also, when a catalog is validated and has errors, Ariba Administrator allows you to view and edit or delete the items with the errors. For more information on fixing validation errors in catalogs, see [About Fixing Syntax Errors \[page 36\]](#).

i Note

You cannot edit or delete BMEcat catalog items in the **Catalog Manager** workspace. You must do so directly in the catalog file and re-import it as a new version.

You cannot edit catalogs that have been validated in the content management system (CMS) in the **Catalog Manager** workspace.

Catalog notification e-mails

When certain catalog events occur, notification messages are sent to the specified user.

The notification might require the user to take an action, or it might be an informational message only. This section introduces these notifications.

For complete information about notifications in SAP Ariba solutions, see the *Notifications reference guide*.

How to add an item to a catalog


You can create and add new items to an imported CIF or cXML catalog through the **Catalog Manager** workspace in Ariba Administrator. You cannot create and add new items to an imported BMEcat catalog.

Prerequisites








A catalog must be deactivated before you can add items to it. It must also be a CIF or cXML catalog; you cannot add items to BMEcat catalogs.

Context

You can also create an empty catalog subscription and add new catalog items to the catalog manually without downloading from a file.

After importing or creating a catalog, click the version to which you want to add an item, and then click the **Edit Content tool** icon . On the **View Content** page, click the **Add New Item** button to create a new item to add to the catalog version.

Procedure

1. On the dashboard, click  **Manage**  **Core Administration** .
2. Select  **Catalog Manager**  **Catalogs** .
3. In the **Catalog Subscription Name** column, click the link for the deactivated catalog to which you want to add an item.
4. In the **Version** column, click the link for the catalog version you want to modify.
5. Click the **Edit Content tool** icon .
6. Click **Add New Item**.
7. Click the **select** link.

A dialog box opens.

8. Click **Select** for the item you want to add (for example, Business Card), then click **OK**.
9. Review any default values, edit them as needed, and click **Save** when you are finished editing.

Whether a field is editable can change depending on the nature of the catalog. For example, in regular single-supplier catalogs, you cannot edit the supplier field. However, if you are adding a new item to a catalog imported as a multi-supplier CIF, you can edit the supplier field.

10. Enter appropriate values in any editable fields, then click **Save**.

To change or add values, click the **select** link for the field.

Some fields, like **Classification Code**, allow for multiple values (for example, multiple domain/value pairs). To add additional values to this type of field, click **Add Value** (in the row beneath), then enter the values as permitted by the field.

To delete a value from a field that allows multiple values, click **Delete Value**.

Results

When you save your changes, the catalog item is validated in the current version of the catalog. A new version of the catalog is not created when you add new items, but the addition is noted in the catalog's history. If the item you added contains errors, they are listed in the contents of the catalog. For example, if you give an item the same supplier ID, supplier part ID, and supplier part auxiliary ID as an item already in the catalog subscription, the new item is considered a duplicate and generates an error.

Related Information

[How to deactivate a catalog \[page 90\]](#)

How to delete or edit items from a catalog

When an item in a catalog is deactivated, you can delete or edit the item by opening the version it was deactivated in.

Prerequisites

A catalog must be deactivated before you can delete items from it. It must also be a CIF or cXML catalog; you cannot delete items from BMEcat catalogs.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. In the **Catalog Subscription Name** column, click the link for the deactivated catalog from which you want to delete an item.
4. In the **Version** column, click the link for the catalog version you want to modify.
5. Click the **Edit Content tool** icon ✎.
6. Click the checkbox for the item you want to modify and do one of the following:
 - Click **Delete** to delete the item.
 - Click **Edit** for the item you want to edit.
Enter appropriate values in any editable fields, then click **Save**.

To change or add values, click the **select** link.

Some fields, like **Classification Code**, allow for multiple values (for example, multiple domain/value pairs). To add additional values to this type of field, click **Add Value** (in the row beneath), then enter the values as permitted by the field.

To delete a value from a field that allows multiple values, click **Delete Value**.

If the item has a catalog item image associated with it and the image has recently been updated on a website or local file, click **Refresh** to replace the old image with the update one.

How to revalidate catalogs


When you import a catalog, either manually or automatically, the catalog is automatically validated. You can, however, revalidate a CIF or cXML catalog if it is not activated. This is particularly useful after you have edited the catalog.

Context

You cannot revalidate catalogs that have been validated previously in the content management system (CMS).

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. In the **Catalog Subscription Name** column, click the link for the deactivated catalog you want to revalidate.

4. In the **Version** column, click the link for the catalog version you want to revalidate.
5. Click the **Revalidate tool** icon .
6. Set the error-reporting options for punchout items.
7. Click **Revalidate**.

Results

The SAP Ariba solution revalidates the catalog. If there are errors or warnings when revalidation is complete, a link appears that you can click to view the errors and warnings.

Related Information

[How to export catalogs \[page 95\]](#)

How to export catalogs








You can export a CIF or cXML catalog to a file so that you can edit the file in any text editor.

Context

i Note

You cannot export BMEcat catalogs from the **Catalog Manager** workspace. However, you can export the associated catalog content document from the **Catalog Content Manager** workspace.

Procedure

1. On the dashboard, click  **Manage**  **Core Administration** .
2. Select  **Catalog Manager**  **Catalogs** .
3. In the **Catalog Subscription Name** column, click the link for the catalog you want to export.
4. In the **Version** column, click the link for the catalog version you want to export.
5. Click the **Export tool** icon .
6. Select the format in which you want to export the catalog.

7. Select the type of items you want to export.
8. Click **Export**.
The catalog is exported. You are prompted to open or save the file.

Deleting catalogs

You can delete entire catalogs so that their items no longer appear in the catalog. You can also delete all versions of a catalog but leave the subscription intact, which is useful when you want to clear out previous versions.

When you delete an Ariba Network subscription, you are deleting the copy that resides in the SAP Ariba solution, not the original subscription on the Ariba Network. The next time the **Ariba Network Full Subscription Synchronization** scheduled task runs, the subscription will appear in the SAP Ariba solution again. To permanently delete an Ariba Network subscription, you must delete it from both the Ariba Network and the SAP Ariba solution.

If you want to delete a subscription, all the catalogs in the subscription must be deactivated.

If you want to delete a version of a catalog, that version must be deactivated.

How to delete a subscription

Prerequisites

Before you can delete a subscription, you must deactivate all catalogs in the subscription.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalogs** ►.
3. Select the checkbox for the subscription you want to delete, and click **Delete Subscriptions**.

If you attempt to delete Ariba Network subscriptions, you receive a warning message, requiring you to confirm your intention.

How to delete a catalog version

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.

2. Select **Catalog Manager** > **Catalogs**.
3. Click the checkbox for the catalog version you want to delete, then click **Delete Versions**.

Next Steps

If you exported the latest version of the catalog, you can now reimport it, or you can import a new version provided by the supplier. If this is an Ariba Network subscription, the next version of the catalog will be imported automatically.

Adjusting mappings

During the validation and correction process, you may need to adjust the mappings for commodity codes, units of measure, and currency. The implementation staff initially defines these mappings with integration worksheets.



To adjust the mappings, you can:

- Edit the CSV file and run a data import task to reload it.
- Use a map tool in the **Catalog Manager** workspace.

If you edit the loaded data, you will lose those changes if the system administrator re-runs the integration. As the catalog manager, you should decide whether to maintain your mappings in the underlying CSV file or in Ariba Administrator.

In Ariba Administrator, you can access the mappings in two ways:

Open the **Catalog Manager** workspace, then click the link for the map you want (**Currency Map** or **Unit of Measure Map**).

If you are already viewing a version of a catalog, click the icon for the map you want (**Edit UOM map tool**  or **Edit Currency Map tool** .

For more information about commodity codes, units of measure, and currency maps in SAP Ariba solutions, see the *Common data import and administration guide*.

Related Information

[How to edit a unit of measure map \[page 98\]](#)

[Currency mappings \[page 99\]](#)

How to edit a unit of measure map

Your SAP Ariba solution uses mappings to associate standard abbreviations for units of measure to canonical representations you might be using. You can adjust units of measure for catalogs that use UNUOM for their units of measurement.

Context



UNUOM stands for United Nations Units of Measure. It is also called UNCEFACT, which stands for United Nations Centre for Trade Facilitation and Electronic Business. ANSI stands for American National Standards Institute.

Catalogs in cXML must use only UNUOM. Catalogs in CIF use ANSI by default, but can use UNUOM.

Note

SAP Ariba does not validate catalogs that use ANSI for their units of measurements.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Select **Catalog Manager** > **Catalogs**.
3. In the **Catalog Subscription Name** column, click the link for the catalog whose units of measure you want to edit.
4. In the **Version** column, click the link for the catalog version you want to edit.
5. Click the **Edit UOM (UNCEFACT) Map tool** icon .
6. If you want to delete mappings, use the search filters to display those in which you are interested:
 - a. Click **Add/Remove Search Filters** to set the filters used in the search.
 - b. Enter search criteria and click **Search** to display the results of the search, or click **List All** to list all the units-of-measure mappings in SAP Ariba solutions.
 - c. If available, click the **Table Options Menu** icon , located in the row above the column headers, to display commands that control the display of data in the table. For example, you can hide or show columns of data, group data, or export data to Excel.
 - d. Check the **Preferred** checkbox in a map entry if you want to specify which value is preferred in the case where there is more than one external value mapped to one internal value.
 - e. Check the checkbox for each mapping you want to delete, then click **Delete**.
7. If you want to create a new mapping, perform the following steps:
 - a. Click **Create New**.
 - b. Supply the following information:

Option	Task
Adapter Source	<p>Select an adapter source from the list.</p> <p>To add the new entry to the existing map, choose an existing file name. Note that when data import tasks are run that update map files, your edits to the map may be removed.</p> <p>To create a new entry outside of the existing map file, choose Manually Maintained. A manually maintained entry will not be affected by data import tasks that reload maps. Note that manually maintained entries will not be exported along with the existing map file when you export a map.</p>
External Value	<p>Enter an external value if you are using one.</p> <p>External values are sent to your company from outside sources and must be mapped to internal values that already exist in your SAP Ariba solution.</p>
Internal Unit of Measure	Select an internal unit of measure from the list.
Comment	Enter a comment.

c. Click **Save**.

8. If you want to export the map, perform the following steps:

- a. Navigate to ► **Catalog Manager** ► **Data Import/Export** ►.
- b. In the **Export** tab, locate **Unit of Measure Mapping** and click **Export**.


Related Information

[Currency mappings \[page 99\]](#)

Currency mappings

SAP Ariba solution uses currency mappings to associate standard abbreviations for currencies to canonical representations you might be using.

The process of editing a currency map is essentially the same as the process for editing a unit-of-measure map, with the following exceptions:

- Use the **Edit Currency Map tool**  instead of the **Edit UOM Map tool**.
- In the search filters, you select an internal currency rather than an internal unit of measure.
- When creating a new mapping, you specify an internal currency rather than an internal unit of measure.

Related Information

[How to edit a unit of measure map \[page 98\]](#)

Topics about validating catalog data using the content management system (CMS)

[Workflow of managing catalogs using CMS \[page 101\]](#)

The content management system (CMS) provides options to create catalog rules to validate, cleanse, and enrich the imported catalog data efficiently. It also provides reports to analyze the catalog content.

[Catalog Content Manager workspace \[page 103\]](#)

The **Catalog Content Manager** workspace in the **Ariba Administrator** provides access to tasks for catalog managers to manage the content of the imported catalogs.

[Deleting catalog content documents \[page 104\]](#)

Catalog managers can delete catalog content documents that are in Fatal Error, Validation Error, or Deactivated statuses manually, irrespective of the number of days that the documents are in these statuses.

[Downloading and republishing the original version of a content document \[page 105\]](#)

Catalog managers can download the original version of a content document that had not been processed by any of the available catalog content rules. And catalog managers can republish the original version of a content document even when latter versions of the content document are available.

[How to edit and revalidate a catalog content document \[page 106\]](#)

You can edit an imported catalog content document, edit the items to fix validation errors if any, and revalidate it.

[How to view the status and summary of an imported catalog content document \[page 106\]](#)

When you import a catalog, the available content rules are executed implicitly and you can view the status of the items in the catalog summary.

[Content rules and content rule formulas \[page 109\]](#)

You can define a set of content rules to validate, cleanse, and enrich the imported catalog data. And you can define the criteria and constraints of your catalog content rule using formulas.

[How to create and modify a lookup file \[page 121\]](#)

You create new lookups by importing lookup files, specifying the key and value columns, and mapping the column fields to catalog fields. You can also download previously imported lookup files, edit them as necessary and re-import them.

[Sample use cases and content rule examples \[page 123\]](#)

[How to view content comparison reports \[page 130\]](#)

You can compare the contents of a catalog version with the currently active version of that catalog.

[How to export catalog content documents \[page 131\]](#)

You can export catalog content documents in a CSV format. You can use the exported version to compare it with the original version of the catalog that you imported.

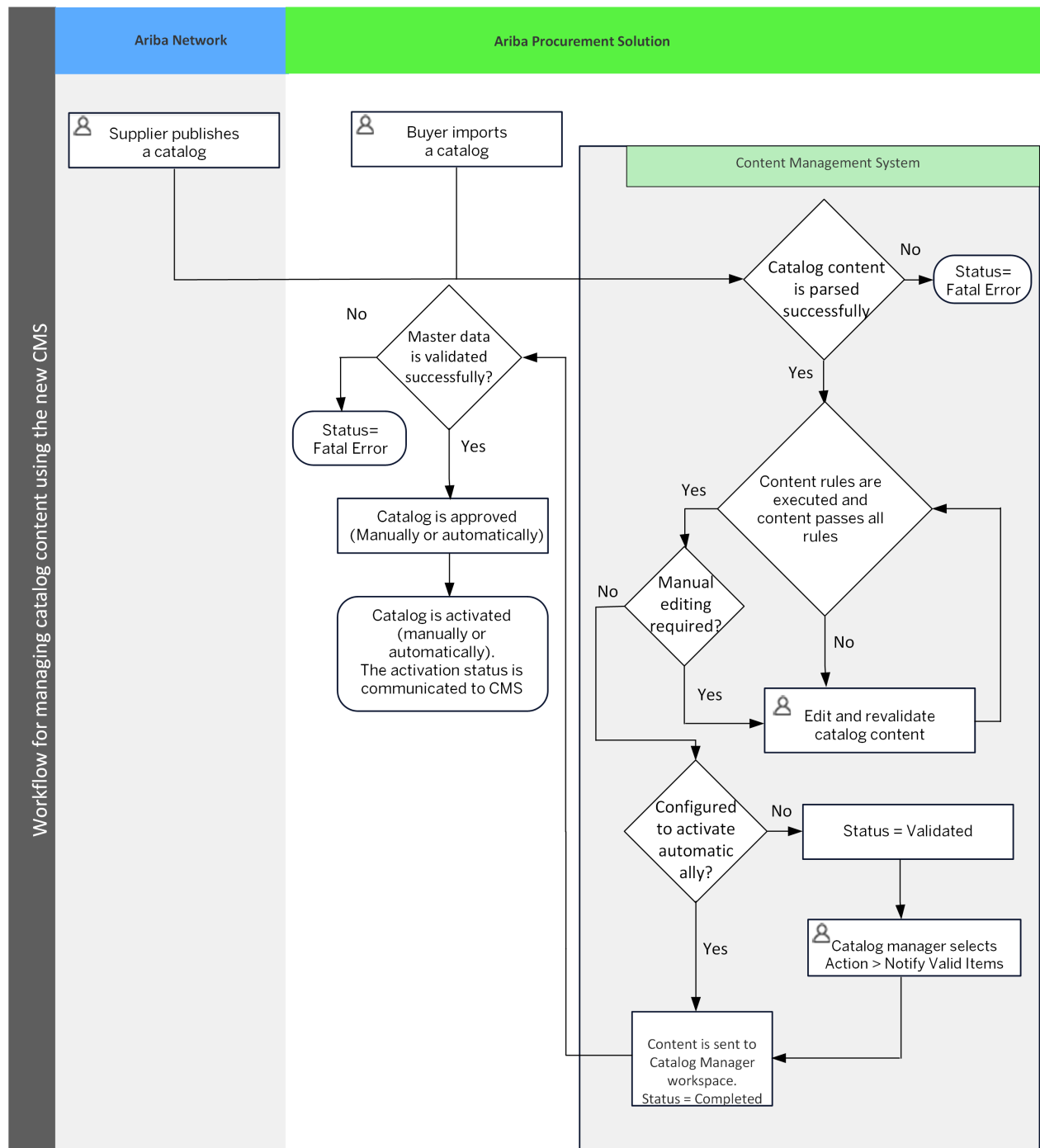
[How to view catalog content reports \[page 132\]](#)

You can use the available catalog content reports to analyze your imported catalog content.

Workflow of managing catalogs using CMS

The content management system (CMS) provides options to create catalog rules to validate, cleanse, and enrich the imported catalog data efficiently. It also provides reports to analyze the catalog content.

The following diagram illustrates the workflow of catalog content management using CMS:



Managing catalog content using the catalog content management system involves the following high-level steps:

1. An Ariba Customer Support representative enables this feature for your customer site.
2. A catalog manager creates validation, enrichment, and cleansing rules depending on the requirement from the **Catalog Content Manager** workspace.
The catalog manager can also import lookup files and create catalog rules based on lookup files.
3. Catalogs are loaded to SAP Ariba Procurement solutions in one of the following ways:
 - The catalog manager imports a catalog manually from the **Catalog Manager** workspace.
 - Supplier publishes a catalog on Ariba Network and the catalog is downloaded from Ariba Network when the **Ariba Network Full Subscription Synchronization** scheduled task is run.

i Note

To avoid time-out errors, large catalog files can be uploaded in a ZIP file format.

SAP Ariba Procurement solutions support the use of multi-supplier catalogs through manual import or via an Ariba Network catalog subscription.

4. A catalog content document is created and pushed to the content management system for cleansing, validation and enrichment.
The status of the catalog in the **Catalog Manager** workspace is updated to **New to Buyer**.
5. The catalog content document is processed in the following sequence:
 - Parsing: Syntax checks are applied to verify that all required content is in the correct format.
 - Cleansing: Catalog data that does not pass the defined cleansing rules is deleted.
 - Validation: Catalog data is validated based on the defined validation rules.
 - Enrichment: Catalog data is enriched based on the defined enrichment rules.
6. Catalog manager can view the status of the imported catalog content document in the **Content Documents** task in the **Catalog Content Manager** workspace.
Content documents that pass validation move to the **Validation** status while catalogs that fail validation move to the **Validation Failed** status.

i Note

Content documents that fail parsing are indicated by a **Fatal Error** status. Such content documents cannot be edited within the CMS and must be reimported after making the necessary changes.

7. The catalog manager can view the summary of the imported catalog content documents and edit the content of catalogs that failed validation.
8. Catalog manager can edit the error field values and revalidate the catalog content document.
Catalog managers can also edit validated content documents if required and revalidate them.
9. Validated content documents are then pushed to the **Catalog Manager** workspace for further validation, approval and activation in one of the following ways:
If during import, the **Activate Automatically** option is set to:
 - **Yes** - the content document is pushed to the **Catalog Manager** workspace automatically.
 - **No** - the catalog manager must push the content document to the **Catalog Manager** workspace manually by clicking **Notify valid items**.

The status of the catalog content documents changes to **Completed**. A catalog comparison report is also generated and an intermediary **Generating Comparison** status might be displayed.
10. The catalog in the **Catalog Manager** workspace is then validated against the master data.

i Note

You cannot edit the content of these catalogs using the **Edit Content** tool in the **Catalog Manager** workspace.

11. Depending on your configuration, catalog that pass validation are then approved and activated either manually or automatically.
12. The status of the activated catalogs is updated in the content management system.

Catalog Content Manager workspace

The **Catalog Content Manager** workspace in the **Ariba Administrator** provides access to tasks for catalog managers to manage the content of the imported catalogs.

Catalog content documents and content document statuses

In sites enabled for managing catalogs using the content management system (CMS), when a catalog is imported either locally from the **Catalog Manager** workspace or downloaded from Ariba Network, a content document is created and pushed to the CMS for cleansing, validation, and enrichment.

Content document statuses

In the **Content Documents** page, the **Status** column indicates the current state of the imported catalog.

The following table lists the various statuses that are applied to catalog content documents:

Status	Description
New	The content document is new to the content management system and is currently being parsed.
Parsed	Syntax checks have been applied to verify that all required content is in the correct format.
Fatal Error	The content document has failed parsing and the errors cannot be fixed within the CMS. Catalogs that are in this status cannot be edited within the content management system and must be reimported after making the necessary changes.
Validation Error	The content document has failed one or more content rules.
Revalidating	The content document is being revalidated against all the content rules.
Validated	The content document has passed all the content rules.

Status	Description
Completed	The content document has passed all validation and is pushed to the Catalog Manager workspace.
Generating Comparison	A comparison report of the imported version and its active version is being generated.
Activated	The content document has been approved and activated in the Catalog Manager workspace.
Deactivated	The content document has been deactivated in the Catalog Manager workspace.

Catalog content documents

The catalog content document is processed in the following sequence:

- Parsing: Syntax checks are applied to verify that all required content is in the correct format.
- Cleansing: Catalog data that does not pass the defined cleansing rules is deleted.
- Validation: Catalog data is validated based on the defined validation rules.
- Enrichment: Catalog data is enriched based on the defined enrichment rules.

After processing, validated content documents are pushed back to the **Catalog Manager** workspace and merged with the associated catalogs. The catalogs are then subject to further validation, approval, and activation.

Related Information

[How to view the status and summary of an imported catalog content document \[page 106\]](#)

[How to edit and revalidate a catalog content document \[page 106\]](#)

Deleting catalog content documents

Catalog managers can delete catalog content documents that are in Fatal Error, Validation Error, or Deactivated statuses manually, irrespective of the number of days that the documents are in these statuses.

They can navigate to ► **Catalog Content Manager** ► **Content Documents** ► page, and use the **Delete** option in the **Actions** menu to delete content documents.

i Note

Deleting a deactivated content document does not delete the associated catalog subscription version from the ► **Catalog Manager** ► **Catalogs** ► page.

Your site can also be configured such that catalog content documents that are in Fatal Error, Validation Error, or Deactivated statuses for more than 30 days are automatically deleted. However, content documents in Validation Error status that do not have at least two previous versions are not deleted automatically.

Deleting catalogs that are in the New to Buyer status

Catalog managers can delete catalogs that are in the **New to Buyer** status from the **Catalog Manager > Catalogs** page. These catalogs can be deleted only if there aren't any associated catalog content documents in the content management system (CMS), or if they are in New, Parsed, Fatal Error, Validation Error, Validated, Deactivated, or Completed statuses.

Note

When catalogs in the **New to Buyer** status are deleted, the associated catalog content documents in the content management system (CMS) are deleted.

Downloading and republishing the original version of a content document

Catalog managers can download the original version of a content document that had not been processed by any of the available catalog content rules. And catalog managers can republish the original version of a content document even when latter versions of the content document are available.

Downloading the original version

Catalog managers can navigate to **Catalog Content Manager > Content Documents** and use the **Download Original** option in the **Action** menu to download the original content document version.

They can also download the original version from the **Content Summary** page by clicking the **Download Original File** link.

Republishing the original version

When an original version of the catalog document is republished, the document is processed as per the current content rules and a new version is published. Any manual edits made previously to the content document are lost.

Catalog managers can navigate to **Catalog Content Manager > Content Documents** and use the **Republish** option in the **Action** menu to republish the original content document version.

How to edit and revalidate a catalog content document

You can edit an imported catalog content document, edit the items to fix validation errors if any, and revalidate it.

Procedure

1. In the **Ariba Administrator**, navigate to ► **Catalog Content Manager** ► **Content Documents** ► to view a list of the imported catalog content documents.
2. Locate the content document that you want to edit, click **Actions** and select **Edit Content**.

The page displays the list of items in the content document. Items that failed one or more content rule conditions are indicated by icons and the associated field values are displayed in red boxes.

3. You can use the options in the **See All Items** menu to narrow the list and view items that are in a particular status.

For example, click **See All Items** and select **See Enriched Items** to see only the list of items that have been enriched.

4. Click the value of the field that you want to edit, enter a new value and click **Ok**.

Your changes are automatically validated.

5. Optionally, click **Save** to save your changes.
6. Click **Revalidate** to run the rules again and revalidate the entire catalog content document.

How to view the status and summary of an imported catalog content document


When you import a catalog, the available content rules are executed implicitly and you can view the status of the items in the catalog summary.

Procedure

1. In the Ariba Administrator page, navigate to ► **Catalog Content Manager** ► **Content Documents** ►.

The page displays the list of imported catalog content documents sorted by ascending order of supplier and catalog names and by descending order of the last modified date. The status column indicates the status of the content document.

You can use the search bar to search for content documents by supplier or catalog names. Search is always performed on the entire list of content documents.

Content Documents							Enter a supplier or a catalog name 
<div> <div>25</div> <div>7</div> <div>14</div> <div>4</div> </div> <div> <div>All</div> <div>Activated</div> <div>Validated</div> <div>Error</div> </div>							
Supplier Name	Catalog Name	Version	Load Mode	Items	Status	Last Modified	Action
JCN Technolo...	OffSup234...	Version 2	Full	25	New	15 February...	Action
JCN Technolo...	OffSup234...	Version 1	Full	22	Validation Error	13 February...	Action
Apex Corpora...	Catalog_Apex...	Version 1	Full	100	Validated	25 January...	Action
Tridax, Inc.	Tridax_multi_...	Version 4	Full	74	Activated	23 January...	<div> View Summary Edit Content Notify Valid Items View Report View Comparison Download </div>
ABC Corp	Cat-ABC-432...	Version 2	Full	1234	Validation E...	14 January...	
Wayne Enter...	WYN-BRC-23...	Version 1	Full	94	Parsed	14 January...	
Stark Industr...	Robo_7865..	Version 5	Full	77	Fatal Error	07 January...	
Stark Industr...	Robo_7865..	Version 4	Full	25	Activated	11 January...	

- Click a status tile to view content documents in that particular status.

The following tiles are displayed to enable you to view a filtered list of content documents::

- **All** - lists all the content documents irrespective of their status
- **Activated** - lists the content documents that are in the **Activated** status
- **Validated** - lists the content documents that are in the **Validated** status
- **Error** - lists the content documents that are in the **Fatal Error** or **Validation Error** statuses

- Search for or locate the catalog that you imported, click **Actions** and select **View Summary**.

The page displays the total number of items that have been imported and the number of items that failed content rules, grouped by the following states: **Validation Error**, **Validation Warning**, **Cleansed**, and **Enriched**.

Expand each item status group to view the list of rules that caused failures and the item count per rule.

- Click an item status link to view the items that are in that particular status. For example, click the **Validation Error** link to view the list of items with validation errors.

Content Summary

Office-Sup-456 v4

Item Status	Item Count	Description
Imported	74	Items imported
▼ Validation Error (2)		Items with validation errors
SPID is a mandatory field.		7
Items from approved Manufacturers		
► Validation Warning (1)		Items with validation warnings
Enriched		Item enriched
Cleansed		Item cleansed
Cleansed Manually	2	Items cleansed manually

[Cancel](#)[Edit Content](#)

Related Information

[How to edit and revalidate a catalog content document \[page 106\]](#)

Content rules and content rule formulas

You can define a set of content rules to validate, cleanse, and enrich the imported catalog data. And you can define the criteria and constraints of your catalog content rule using formulas.

Content rules

You can define the following types of rules:

- Validation rules
- Cleansing rules
- Enrichment rules
- Approval rules

When creating a content rule, you specify whether the rule is applicable to catalogs items from all suppliers or only to items from a specific supplier.

Validation rules

A validation rule is a set of constraints applied on catalog item field value depending on your business requirements. When creating a validation rule you can specify whether the value for a catalog field is mandatory or optional, and also specify the value that is expected in a catalog field. A catalog fails validation if a catalog field value on any line item fails to meet the constraints set in a validation rule.

You can specify whether a validation failure must result in an error or a warning. For example, you can define a rule to display an error if the expiration date of an item is earlier than the current date. Or, you can define a rule to display a warning message if the lead time of an item is greater than a specific value.

Catalogs that failed validation with warnings can be moved to the next status even if the cause of the warnings is not addressed. However, catalogs that failed validation with errors must be fixed before they can be moved to the next status.

Cleansing rules

A cleansing rule is used to filter and delete items from the catalog that do not meet your requirements or standards. For example, you can define a rule to delete the items that have a Company Name that is not in a specific list of names. Or, you can define a rule to delete all items that have an expiry date that is earlier than a specific date.

Enrichment rules

An enrichment rule is used to update a catalog field value based on specific conditions. You can define enrichment rules to update, refine or populate a catalog field value based on the value of another catalog field value. For example, you can define a rule to update the value of the catalog field **Green** based on the **Commodity Code** field value of the item.

i Note

You cannot update key-value pair catalog fields such as, `Item Spec` and `RelatedItems`.

Approval rules

A catalog content approval rule is used to assign approvers to a different sets of items in a catalog based on an approver lookup. For example, you can define an approval rule to assign specific approvers to specific sets of items in a catalog.

For some example rules, see:

- [Cleansing rule to delete items from certain manufacturers \[page 124\]](#)
- [Validation rule to ensure Short Name is populated \[page 124\]](#)
- [Enrichment rule based on lookup file using wildcard \[page 125\]](#)
- [Enrichment rule based on a lookup file to enrich a custom catalog field \[page 127\]](#)

Content rule formulas

You can define the criteria and constraints of your catalog content rule using formulas. You can build a formula by adding one or more expressions using a combination of operators, functions, fields and lookup tables.

When creating formulas, the list of operators and functions that are available for selection depend on the selected field.

Formula operators and functions

You use operators and functions in combination with fields and lookups to create formulas. The following tables list the operators and functions that are available.

Table 1: Operators

Operator	Description
In	Evaluates if a value is in the list of values that follow this operator in the expression. Example: (manufacturername In Wayne, Stark, Tridax) evalutes whether the manufacturername value is in the list of specified values.
Not In	Evaluates if a value is not in the list of values that follow this operator in the expression.
Equals	Evaluates if two values are equivalent. Example: supplierpartauxiliaryid Equals supplierpartid evalutes whether the Supplier Part Auxiliary ID value is equal to the Supplier Part ID value.

Operator	Description
Not Equals	<p>Evaluates if two values are not equivalent.</p> <p>Example: <code>suppliername Not Equals manufacturername</code> evaluates whether the Supplier Name value is not equal to the Manufacturer Name value.</p>
Greater Than	<p>Evaluates if a value is greater than the value that follows this operator in the expression.</p> <p>Example: <code>leadtime Greater Than 5</code> evaluates whether the leadtime value is greater than 5.</p>
Greater Than OR Equal	<p>Evaluates if a value is greater than or equal to the value that follows this operator in the expression.</p> <p>Example: <code>leadtime Greater Than OR Equal 5</code> evaluates whether the leadtime value is greater than or equal to 5.</p>
Less Than	<p>Evaluates if a value is less than the value that follows this operator in the expression.</p> <p>Example: <code>leadtime Less Than 5</code> evaluates whether the leadtime value is less than 5.</p>
Less Than OR Equal	<p>Evaluates if a value is less than or equal to the value that follows this operator in the expression.</p> <p>Example: <code>leadtime Less Than OR Equal 5</code> evaluates whether the leadtime value is less than or equal to 5.</p>
Is Required	<p>Evaluates whether or not the value for a field is required.</p> <p>Example: <code>(buyerpartid Is Required True)</code> evaluates whether a value for <code>buyerpartid</code> is specified and returns <code>False</code> if the value is missing.</p>

Table 2: Functions

Function	Description
Text Functions	
CONCAT	<p>Combines two or more text strings.</p> <p>For example: <code>CONCAT (SUP)</code> fetches the specified field value and prefixes it with <code>SUP</code>.</p>
ISALLLOWERCASE	<p>Determines whether or not the characters in a specified text string are in lower case.</p>

Function	Description
ISALLUPPERCASE	Determines whether or not the characters in a specified text string are in upper case.
STARTSWITH	Determines whether text begins with specific characters and returns TRUE if it does or returns FALSE if it does not.
ENDSWITH	Determines whether text ends with specific characters and returns TRUE if it does or returns FALSE if it does not.
STRINGCOUNT	Returns the position of a string within a string of text represented as a number.
STRINGREPLACE	Replaces an existing text with a new text in a text string.
SUBSTRING	<p>Extracts and returns a specified number of characters from a string of text.</p> <p>For example: SUBSTRING (description , 0 , 20) extract and returns the first 20 characters of the item description field.</p>
LENGTH	<p>Returns the number of characters in a specified text string.</p> <p>For example: LENGTH (description) returns the total number of characters in the item description field.</p>
Date and Time Functions	
DAY	Determines the day in a date and returns the value in the form of a number between 1 and 31.
MONTH	Determines the month in a date and returns the value in the form of a number between 1 (January) and 12 (December).
YEAR	Determines the year in a date and returns the value as a four-digit number.
ADDDAYS	Adds the specified number of days to a selected date.
CURRENTDATE	Returns the current date as a date data type.
GETDATE	Returns the date value.
MINDATE	Compares two or more dates and returns the date that is the earliest.
MAXDATE	Compares two or more dates and returns the date that is the latest.

Function	Description
DATEINRANGE	Determines whether a date is within the specified range of dates.
DATENOTINRANGE	Determines whether a date is not within the specified range of dates.
Math Functions	
MIN	Returns the lowest number from a list of numbers.
MAX	Returns the highest number from a list of numbers.
NUMBERINRANGE	Determines whether a number is within the given range of numbers and returns <code>True</code> .
NUMBERNOTINRANGE	Determines whether a number is not within the given range of numbers and returns <code>True</code> .
NUMERICSUM	Calculates the sum of two numbers.
NUMERICDIFF	Calculates the difference between two numbers.
NUMERICPRODUCT	Calculates the product of two numbers.
NUMERICQUOTIENT	Calculates the quotient of two numbers.
GETDECIMALPRECISION	Determines the number of digits in a number.
ROUNDNUMERIC	Returns the nearest number to a number you specify, constraining the new number by a specified number of digits.
Logical Functions	
IN	Evaluates if a value is in the list of specified values.
NOTIN	Evaluates if a value is not in the list of specified values.
ISNUMERIC	Determines if a text value is a number.
REQUIRED	Determines whether or not a value is required.
PATTERNMATCH	Evaluates whether the data conforms to a specified pattern.

Function	Description
INLOOKUP	<p>Determines whether or not a value is in the list of values specified in a lookup file.</p> <p>Example: <code>INLOOKUP(file, field)</code> where <code>file</code> indicates the lookup file name and <code>field</code> indicates the catalog field name.</p> <p><code>(INLOOKUP(LookupFileName, classificationcode.O.value) Is Required TRUE)</code></p>
ENRICHFROMLOOKUP	<p>Updates a field value with a related value fetched from a lookup file.</p> <p>Example: <code>ENRICHFROMLOOKUP(file, field)</code> where <code>file</code> indicates the lookup file name and <code>field</code> indicates the catalog field to be updated.</p>
Other Functions	
VALUEFORDOMAIN	<p>Returns the value of the specified domain of a domain-value pair field.</p> <p>Example: <code>VALUEFORDOMAIN (Classification Code, UNSPSC)</code> where <code>Classification Code</code> indicates the domain-value field and <code>UNSPSC</code> indicates the domain, returns the UNSPSC classification code value</p>
ALLVALUESFORDOMAIN	<p>Returns all the values of the specified domain of a domain-value pair field.</p> <p>Example: <code>ALLVALUESFORDOMAIN (SpecialTreatmentClass, GHS)</code> where <code>SpecialTreatmentClass</code> indicates the domainvalue field and <code>GHS</code> indicates the domain, returns all the values of the GHS domain.</p>
GENERATEUNIQUEIDENTIFIER	<p>Generates a unique identifier with the specified number of characters.</p> <p>Example: <code>GENERATEUNIQUEIDENTIFIER (4)</code> returns a unique identifier consisting of four characters.</p>

How to create and modify content rules

You can create content rules to cleanse, validate, and enrich catalog content.

Prerequisites

Only users belonging to the Customer Catalog Manager group can create or modify content rules.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Navigate to **Catalog Content Manager** > **Content Rules**.
The page displays the list of previously created rules if available.
3. To create a new rule, click **New Rule** and the type of rule that you want to create. For example, click **Validation Rule** to create a validation rule.
To edit an existing rule, locate the rule from the list and select **Edit** from the **Action** menu.
4. Provide or edit the following information as required:

For this option...	Do this...
Name	Enter a descriptive name for the rule.
Supplier	Select All if you want the rule to be applicable to all supplier catalogs, or select a supplier from the list if you want to create a supplier-specific rule.
Description	Enter a description for the rule. This description is also used to be displayed as an error message when editing items. So, ensure that you enter a meaningful description.
Type	This option is displayed only when creating a validation rule. Select Error or Warning depending on the type of message that you want to be displayed when an item fails validation.
Record Type	Select a record type from the available choices.
Field	Select the catalog item field that you want to create the rule for.
Formula	Create a formula for the rule by adding one or more expressions depending on your business requirements. Click Add Expression to define the validation condition for your formula.

New Validation Rule: SPID is mandatory

Name: Active: ☒ ON

Supplier:

Description:

Type: ☒ Error ☐ Warning

Record Type:

Fields:

Formula:

supplierpartid

Fields
 Functions
 Literal
 Lookup

5. Click **Save** to save the content rule.

Related Information

[How to add and modify formulas \[page 116\]](#)

[How to export and import content rules \[page 119\]](#)

How to add and modify formulas

You create a formula for a rule by using various operators and functions depending on your business requirements.

Context

In the process of creating formula for a content rule, you add one or more expressions using a combination of operators, functions, fields and lookup files.

Procedure

1. Navigate to ► **Catalog Content Manager** ► **Content Rules** ►.
2. To create a new rule, click **New Rule** and the type of rule that you want to create. For example, click **Validation Rule** to create a validation rule.

To edit an existing rule, locate the rule from the list and select **Edit** from the **Action** menu.

3. Provide or edit relevant field values as required.
4. Click **Add Expression** to add a validation condition for your formula.

The catalog item field that you want to create the rule for is displayed by default. You can select a different field or a function depending on your requirements.

5. To select a different field or function, click the down arrow icon to the right of the field and select **FIELDS** or **FUNCTIONS** and the required field or function.
 - Click **FIELDS** to see a list of all the available catalog fields.
 - Click **FUNCTIONS** to see a list of all the available functions that can be used to build your formula.
 - Click **LITERAL** to enter the text required for your formula.
 - Click **LOOKUP** to see a list of all the available lookup files.

Field: **supplierpartid**

Formula: **{ supplierid Is Required }**

Add Expression

supplierpartid Is Required **Remove**

Fields
ADDDAYS
ADDVALUEFORDOMAIN
CONCAT
CURRENTDATE
DATEINRANGE
DATENOTINRANGE
DAY
ENDSWITH
ENRICHFROMLOOKUP
GENERATEUNIQUEIDENTIFIER

Functions
Literal
Lookup

Cancel **Save**

6. Select the required operators or the arguments for the function as per your rule requirements and complete the formula.

For more information on operators and functions, see [Content rules and content rule formulas \[page 109\]](#).

7. If you want to specify multiple validation conditions in your formula, add additional expressions as required.
8. To add another expression, click **Add Expression** and select either the **AND- All of the following** or **OR- Any of the following** logical operator depending on your requirement.

Formula: (Supplierid.0.value Equals sid509 **AND** LENGTH(buyerpartid) Equals 0)

AND – All of the following
Add Expression

AND – All of the following
OR – Any of the following

supplierid.0.value
Equals
sid509
Remove

LENGTH (buyerpartid)
Equals
0
Remove

9. To remove an expression, click **Remove**.
10. If you are creating an enrichment rule, an additional **Add** option with a down arrow icon is displayed to enable you to define your enrichment requirements.

You do not have to add any expressions, if you do not want to define a validation condition for your rule.

New Enrichment Rule: Populate Material Number

Name: Populate Material Number Active: ☒

Supplier: ALL

Description: Update Material Number based on SID and SPID

Record Type: catalogitem

Fields: materialnumber Add

Formula: (Add)

Add Expression

Add

Fields
Functions
Literal
Lookup

ADDDAYS
ADDVALUEFORDOMAIN
CONCAT
CURRENTDATE
DATEINRANGE
DATENOTINRANGE
DAY
ENDSWITH
ENRICHFROMLOOKUP
GENERATEUNIQUEIDENTIFIER

Cancel
Save

11. Click **Save** to save your formula and the content rule.

Related Information

[How to export and import content rules \[page 119\]](#)

How to export and import content rules

If you want to make changes to existing content rules or create new content rules, you can export the existing content rules in JSON (JavaScript Object Notation) file format, and import an updated JSON file with the required data.

Procedure

1. On the dashboard, click **Manage** **Core Administration**.
2. Navigate to **Catalog Content Manager** **Content Rules**.
The page displays the list of previously created content rules if available.
3. Click **Export** to export the existing rules in JSON format.
4. To import an updated content rules JSON file, click **Import**.
5. Click **Browse** to navigate to the location of the updated file and click **Import**.

Depending on the data in the updated file, existing content rules are updated and new rules are created.

Results

A sample exported content rules file in JSON format is as follows:

```
[
  {
    "ruleName": "Supplier ID validation",
    "fieldName": "supplierid.0.value",
    "supplierIds": "ALL",
    "ruleType": "Validation",
    "expression": "lAnd(cRequired(getStringField(\"supplierid.0.value\", item),
getBooleanParameter(\"True\")))",
    "jsonExpression": "{ \"type\": \"logicalOperator\", \"value\": \"AND\", \"operands\":
[ { \"type\": \"expression\", \"operator\": \"REQUIRED\", \"lhs\": { \"type\": \"field\",
\"value\": \"supplierid.0.value\", \"returnType\": \"string\" }, \"rhs\": { \"type\":
\"literal\", \"value\": \"True\", \"returnType\": \"boolean\" } } ] }",
    "actionExpression": null,
    "jsonActionExpression": "{ \"type\": \"literal\", \"value\": \"Add\", \"returnType\":
\"string\" }",
    "setOfFields": null,
    "isActive": true,
    "errorWarning": "Error",
    "description": "Supplier ID is a mandatory field.",
    "failureDescription": null,
    "recordType": "catalogitem",
    "mode": "basic",
```

```

    "lastModifiedTime": 1487060231042
  },
  {
    "ruleName": "Update EOM",
    "fieldName": "unitofmeasure.value",
    "supplierIds": "ALL",
    "ruleType": "Enrichment",
    "expression": "lAnd(cEquals(getStringField(\"unitofmeasure.value\", item),
getStringParameter(\"BOX\")))",
    "jsonExpression": "{\"type\": \"logicalOperator\", \"value\": \"AND\", \"operands\":
[ {\"type\": \"expression\", \"operator\": \"=\", \"lhs\": {\"type\": \"field\", \"value\":
\"unitofmeasure.value\", \"returnType\": \"string\"}, \"rhs\": {\"type\": \"literal\",
\"value\": \"BOX\", \"returnType\": \"string\"} ] } }",
    "actionExpression": "setField(\"unitofmeasure.value\", item,
String.valueOf(getStringParameter(\"CARTON\")))",
    "jsonActionExpression": "{\"type\": \"literal\", \"value\": \"CARTON\", \"returnType
\": \"string\"}",
    "setOfFields": null,
    "isActive": true,
    "errorWarning": null,
    "description": "Enrichment of the UOM value.",
    "failureDescription": null,
    "recordType": "catalogitem",
    "mode": "basic",
    "lastModifiedTime": 1487060872250
  }
]

```

How to rearrange the order in which content rule types are executed

You can configure the sequence in which catalog content rule types are executed. You can move rule types by dragging and dropping them to rearrange the order in which they are executed.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Navigate to **Catalog Content Manager** > **Content Rules**.

The **Content Rules** rules page displays the available rules.

3. Click **Reorder** and select **Rule Types**.

The **Reorder Content Rules Types** page displays the rule types and their execution order.

4. Select a rule type and drag it to the location that you want to move it to. When you drag a rule type, dotted guidelines show you where you can move it to.
5. Click **Done** to save your changes.

How to rearrange the order in which content rules are executed

You can configure the sequence in which catalog content rules are executed. Within each category of content rules, you can move rules by dragging and dropping them to rearrange the order in which they are executed.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Navigate to ► **Catalog Content Manager** ► **Content Rules** ►.
3. Click **Reorder** and select **Rules**.

The **Reorder Content Rules** page displays the available rules grouped by category.

4. Click a category tile to view the rules specific to that particular category.
5. Select a rule and drag it to the location that you want to move it to. When you drag a field, dotted guidelines show you where you can move the field to.

i Note

You can only move rules within the same category.

6. Click **Done** to save your changes.

How to create and modify a lookup file

You create new lookups by importing lookup files, specifying the key and value columns, and mapping the column fields to catalog fields. You can also download previously imported lookup files, edit them as necessary and re-import them.

Context

Lookup files enable you to specify additional information to validate, cleanse, or enrich your catalog data. You can create content rules based on lookup files to validate, cleanse, or enrich your catalog content. For example, you can create a validation rule to ensure that a particular catalog field value is in a list of values specified in the lookup file. Or, you can create an enrichment rule to update the value of a catalog field based on the values specified in the lookup files.

You import lookup files in CSV file format and can use any text editor to create the file.. Before you create the CSV file, you must plan which fields you want to specify as the **Key** (unique identifier) and which fields you want to specify as **Value** fields. **Key** fields are used to specify the unique identifiers and the **Value** fields contain the values to be returned. You must also plan which catalog fields you want to map to the fields in your lookup file.

If you have a text field that contains a comma, you must insert quotation marks around the field values. For example, "Tridax, Inc."

When creating the file, you must ensure that the combination of the **Key** field values for each line is unique.

A sample lookup file is as follows:

```
SupplierName,SupplierPartId,ManufacturerName
Blue Corp,AD15156,Hallmark Cables
Blue Corp,AD15157,Hallmark Cables
Blue Corp,AD15158,Hallmark Cables
Blue Corp,WS1234,Wayne & Stark
Blue Corp,GX8956,"Tridax, Inc."
```

For more information on lookup files, see the following use cases:

- [Enrichment rule based on a lookup file to enrich a custom catalog field \[page 127\]](#)
- [Enrichment rule based on lookup file using wildcard \[page 125\]](#)

Procedure

1. In the Ariba Administrator page navigate to ► **Catalog Content Manager** ► **Lookup Files** ►.

The page displays the list of previously imported lookup files if available.

To download an existing file, select **Download** from the **Action** menu.

2. To create a new lookup, click **New Lookup File**. To edit an existing Lookup, locate it from the list and select **Edit** from the **Action** menu.

3. If creating a new lookup, enter a name and, click **Browse** to browse to the location of the file to import.

The **Lookup Name** field is not editable when modifying an existing lookup.

4. Select a file and click **Import** to import it.

The mappings table is displayed with the lookup fields from the imported file.

5. Map each lookup field to a catalog field by selecting an appropriate field from the **Catalog Fields** column dropdown menu.

You cannot change the mappings or the lookup field type when modifying an existing lookup table.

6. For each field, specify whether the field is a **Key** or a **Value**.

You must specify at least one lookup field as a key.

Import Lookup

Lookup imported successfully

Lookup Name :

Lookup File : MatNumLookup.csv

Mappings :

Lookup Fields	Catalog Fields	Type
SupplierId	<input type="text" value="supplierid"/>	<input checked="" type="radio"/> Key <input type="radio"/> Value
SupplierPartId	<input type="text" value="supplierpartid"/>	<input checked="" type="radio"/> Key <input type="radio"/> Value
MaterialNumber	<input type="text" value="Please select a Field"/>	<input type="radio"/> Key <input checked="" type="radio"/> Value

materialnumber

- Click **Activate** to activate the lookup.

Sample use cases and content rule examples

[Cleansing rule to delete items from certain manufacturers \[page 124\]](#)

When a catalog manager wants to remove all items from a catalog that are from one or more specific manufacturers, they can create a cleansing rule to identify such items based on the **Manufacturer Name** and delete them.

[Validation rule to ensure Short Name is populated \[page 124\]](#)

If the **Short Name** field is required to be populated for all items in the catalog, the catalog manager can create a validation rule to display an error for those items where the short name is missing or is the same as the item description.

[Enrichment rule based on lookup file using wildcard \[page 125\]](#)

The catalog manager can update the **Region** field in the catalog with a list of values based on a combination of other field values such as **Supplier Name**, **Supplier Part ID**, and **Manufacturer Name** by creating an enrichment rule based on a lookup file.

[Enrichment rule based on a lookup file to enrich a custom catalog field \[page 127\]](#)

Catalog managers can update custom catalog fields with a list of values based on a combination of other catalog field values by creating an enrichment rule based on a lookup file.

Cleansing rule to delete items from certain manufacturers

When a catalog manager wants to remove all items from a catalog that are from one or more specific manufacturers, they can create a cleansing rule to identify such items based on the **Manufacturer Name** and delete them.

The following formulas can be used to define this rule:

- To identify items from one manufacturer: (manufacturername Equals Manufacturer1)
- To identify items from a list of manufacturers: (manufacturername In Manufacturer1, Manufacturer2, Manufacturer3)

Delete items from manufacturers

Name : Delete item from manufacturers

Active : ☒

Supplier : ALL

Description : Delete items from certain manufacturers

Record Type : catalogitem

Fields : manufacturername

Formula : (manufacturername In Wayne Corp, Stark Industries, Apex)

Add Expression

manufacturername In Wayne Corp, Stark Industries, Apex

Remove

Save

Cancel

Validation rule to ensure Short Name is populated

If the **Short Name** field is required to be populated for all items in the catalog, the catalog manager can create a validation rule to display an error for those items where the short name is missing or is the same as the item description.

The following formula can be defined to validate the **Short Name** field: (shortname is Required true)

New Validation Rule: Short Name is mandatory

Name:
Short Name is mandatory

Active:
ON

Supplier:
ALL

Description:
Short Name is a required field.

Type:
☒ Error
☐ Warning

Record Type:
catalogitem

Fields:
shortname

Formula:
(shortname Is Required true)

Add Expression

shortname
Is Required
true

Remove

Save
Cancel

Enrichment rule based on lookup file using wildcard

The catalog manager can update the **Region** field in the catalog with a list of values based on a combination of other field values such as **Supplier Name**, **Supplier Part ID**, and **Manufacturer Name** by creating an enrichment rule based on a lookup file.

Creating the lookup file and the enrichment rule involves the following high-level steps:

1. The catalog manager creates the lookup file with relevant data based on the business requirements. For example, consider the following file where the **Supplier Name**, **Supplier Part ID**, and **Manufacturer Name** fields are to be used as keys and the **Region** field as the value when creating the enrichment rule:

```
SupplierName,SupplierPartId,ManufacturerName,Region
Blue Corp,AD15156,Hallmark Cables,Region1
Blue Corp,AD15157,Hallmark Cables,Region2
Blue Corp,*,Hallmark Cables,"Region1,Region2,Region3"
Blue Corp,*,Wayne & Stark,"Region3, Region4"
Globex,*,*, "Region1,Region4"
```

Note

To specify more than one value for a **Value** field, separate the values with commas (,) and quote the entire field. For example, "value1, value2, value3".

You can use asterisk (*) as a value for **Key** fields to enable wildcard matching.

2. The catalog manager then imports the lookup file, maps the lookup fields to the relevant catalog fields, and specifies whether a lookup field is to be used as a **Key** or **Value**. In this example, **Supplier Name**, **Supplier Part ID**, and **Manufacturer Name** are marked as key fields and **Region** as the value field.

Import Lookup

Lookup imported successfully

Lookup Name :

Lookup File : RegionLookup.csv

Mappings :

Lookup Fields	Catalog Fields	Type
SupplierName	<input type="text" value="suppliename"/>	<input checked="" type="radio"/> Key <input type="radio"/> Value
SupplierPartId	<input type="text" value="supplierpartid"/>	<input checked="" type="radio"/> Key <input type="radio"/> Value
ManufacturerName	<input type="text" value="manufacturename"/>	<input checked="" type="radio"/> Key <input type="radio"/> Value
Region	<input type="text" value="Please select a Field"/>	<input type="radio"/> Key <input checked="" type="radio"/> Value

3. The catalog manager then creates an enrichment rule with a relevant formula based on the imported lookup file to update the **Region** field. To create the rule formula for this use case, the catalog manager clicks **Add**, selects the **ENRICHFROMLOOKUP** function and then selects the relevant lookup file and the field to be enriched as the arguments of the function. For example: `ENRICHFROMLOOKUP (LookupFile, Region)`

Formula : (Add)

ENRICHFROMLOOKUP ▾ (Region_Enrich ▾ , Region ▾)

4. When a catalog is imported, the catalog data is enriched based on the defined enrichment rule and the associated lookup file as follows:
- As per the first row in the lookup CSV file - The **Region** field value of items in the catalog where **Supplier Name** is Blue Corp, **Supplier Part ID** is AD15156, and **Manufacturer Name** is Hallmark Cables is updated to Region1.
 - As per the second row in the lookup CSV file - The **Region** field value of items in the catalog where **Supplier Name** is Blue Corp, **Supplier Part ID** is AD15157, and **Manufacturer Name** is Hallmark Cables is updated to Region2.

- As per the third row in the lookup CSV file - The **Region** field value of items in the catalog where **Supplier Name** is Blue Corp, **Supplier Part ID** is any value other than AD15156 or AD15157, and **Manufacturer Name** is Hallmark Cables is updated to Region1, Region2, Region3.
- As per the fourth row in the lookup CSV file - The **Region** field value of items in the catalog where **Supplier Name** is Blue Corp, **Supplier Part ID** is any value, and **Manufacturer Name** is Wayne & Stark is updated to Region3, Region4.
- As per the fifth row in the lookup CSV file - The **Region** field value of items in the catalog where **Supplier Name** is Globex is updated to Region1, Region4 irrespective of the **Supplier Part ID** and **Manufacturer Name** field values.

Enrichment rule based on a lookup file to enrich a custom catalog field

Catalog managers can update custom catalog fields with a list of values based on a combination of other catalog field values by creating an enrichment rule based on a lookup file.

Consider a business case scenario, where a catalog manager wants to update a custom catalog field, **Material Number** with a list of values based on a combination of other catalog field values such as **Supplier ID** and **Supplier Part ID**. To do this, the catalog manager can create an enrichment rule based on a lookup file.

Creating the lookup file and the enrichment rule involves the following high-level steps:

1. The catalog manager creates the lookup file with relevant data based on the business requirements. For example, consider the following file where the **Supplier ID** and **Supplier Part ID** fields are to be used as keys and the **Material Number** field as the value when creating the enrichment rule:

```
SupplierID,SupplierPartId,MaterialNumber
SID497,AD15156,MAT3241
SID497,AD15157,MAT4212
SID497,AD14155,MAT7863
```

2. The catalog manager then imports the lookup file, maps the lookup fields to the relevant catalog fields, and specifies whether a lookup field is to be used as a **Key** or **Value**. In this example, **Supplier ID** and **Supplier Part ID** are marked as key fields and **Material Number** as the value field.

Import Lookup

Lookup imported successfully

Lookup Name :

Mat_Num

Lookup File :

Choose File

MatNumLookup.csv

Import

Mappings :

Lookup Fields	Catalog Fields	Type
SupplierId	supplierid	<input checked="" type="radio"/> Key <input type="radio"/> Value
SupplierPartId	supplierpartid	<input checked="" type="radio"/> Key <input type="radio"/> Value
MaterialNumber	Please select a Field	<input type="radio"/> Key <input checked="" type="radio"/> Value

Q

mat

materialnumber

Activate

Cancel

- The catalog manager then creates an enrichment rule with a relevant formula based on the imported lookup file to update the **Material Number** field.

To create the rule formula for this use case, the catalog manager clicks **Add**, selects the **ENRICHFROMLOOKUP** function and then selects the relevant lookup file and the field to be enriched as the arguments of the function.

For example: `ENRICHFROMLOOKUP (LookupFile, materialnumber)`

New Enrichment Rule: Populate Material Number

Name: Active: ☒

Supplier:

Description:

Record Type:

Fields: Add

Formula: (Add)

Add Expression

Add ▼

Fields	ADDDAYS
Functions	ADDVALUEFORDOMAIN
Literal	CONCAT
Lookup	CURRENTDATE
	DATEINRANGE
	DATENOTINRANGE
	DAY
	ENDSWITH
	ENRICHFROMLOOKUP
	GENERATEUNIQUEIDENTIFIER

Cancel Save

4. When a catalog is imported, the catalog data is enriched based on the defined enrichment rule and the associated lookup file as follows:
- As per the first row in the lookup CSV file - The **Material Number** field value of items in the catalog where **Supplier ID** is SID497 and **Supplier Part ID** is AD15156 is updated to MAT3241.
 - As per the first row in the lookup CSV file - The **Material Number** field value of items in the catalog where **Supplier ID** is SID497 and **Supplier Part ID** is AD15157 is updated to MAT4212.
 - As per the first row in the lookup CSV file - The **Material Number** field value of items in the catalog where **Supplier ID** is SID497 and **Supplier Part ID** is AD14155 is updated to MAT7863.

How to view content comparison reports

You can compare the contents of a catalog version with the currently active version of that catalog.

Context

You can analyze the content of a new version of a catalog by comparing it with the currently active version of that catalog. You can compare any version of a catalog with its active version only. These reports can be helpful in deciding whether or not to activate the new version.

You can generate comparison reports only for versions that are in the **Validated** status.

The report displays the following item statuses:

- **Imported Items**
- **New Items**
- **Modified Items**
- **Unmodified Items**
- **Deleted Items**
- **Items with Modified Price**

You can click on each status to view a list of items in that particular status. When viewing items with modified price, you can also export the report in a CSV format.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Navigate to ► **Catalog Content Manager** ► **Content Documents** ►.

The page displays the list of imported catalog content documents.

3. Locate the content document and the version for which you want to view the comparison report for and click ► **Action** ► **View Comparison** ►.

The **View Comparison** link is available only for content documents that are in the **Validated** status and those that have a previous version that is active.

4. The **Content Comparison Report** page displays the various item statuses and the number of items in each state.
5. Click on an item status link to view the list of items in that status. For example, to view a list of all the modified items, click the **Modified Items** link in the **Item Status** column.

You can export the list of items with modified price in a CSV format by clicking **Export**.

6. When viewing the list of items in a particular status, you can use the options in the item status dropdown to see the list of items in other statuses.
7. To regenerate the comparison report again, click **Regenerate**.

How to export catalog content documents

You can export catalog content documents in a CSV format. You can use the exported version to compare it with the original version of the catalog that you imported.

Context

Only catalog content documents that are in the **Completed** or **Activated** statuses can be exported.

You cannot reimport the exported file.

Only the default catalog fields and their values are exported.

The following is an example of an exported catalog content document in a CSV format:

```
Item Number,Supplier Id,Supplier Name,Supplier URL,Supplier Part Id,Supplier Part
Auxiliary Id,Buyer Part Id,Manufacturer Part Id,Manufacturer Name,Manufacturer
Url,Description,Unit of Measure,Lead Time,Default
Relevance,Image,Thumbnail,Amount,Currency,Is Best Price,Conversion Factor,Price
Basis Quantity,Price Basis Description,Price Basis Quantity UOM,Punchout
Enabled,Language,Expiration Date,Effective Date,Classification Code,Territory
Available,Short Name,Ispartial,Is Preferred Item,In Kit Only,Green,Hazardous
Materials,Keywords,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
Thumbnails.Description,Auxiliary
Thumbnails.RelatedItemInfo.Type,AuxiliaryImages.Order,AuxiliaryImages.Source,Auxilia
ryImages.Purpose,AuxiliaryImages.Alternative,AuxiliaryImages.Description,AuxiliaryIm
ages.RelatedItemInfo.Type,Attachments.Order,Attachments.Source,Attachments.Purpose,A
ttachments.Alternative,Attachments.Description,Attachments.RelatedItemInfo.Type,Pric
eDetails.StartDate,PriceDetails.EndDate,PriceConfiguration.Amount,PriceConfiguration
.Currency,PriceConfiguration.Lower Bound,PriceConfiguration.Price
Factor,RelatedItemInfo.Quantity,RelatedItemInfo.RelatedItem
Key,RelatedItemInfo.Type,RelatedItemInfo.Reference Description,Quantity
Interval,Minimum Quantity
1,SID497,KlickShop Testlieferant DB AG,,2A1-00,,,,,"Expandable upto 64 GB.
Brilliant 6""",C62,21,,http://10.138.169.202:8888/myapp/main.jpeg,,
549,USD,FALSE,,,,,FALSE,deu,,,{UNSPSC=44111501;},DE,"SMARTPHONE,Android
v5(Lollipop)",FALSE,FALSE,FALSE,FALSE,FALSE,Mobile,,,,,0,http://
10.138.169.202:8888/myapp/main.jpeg,detail,Google Nexus main image,Google Nexus
main image,image/jpeg,5,http://10.138.169.202:8888/myapp/
nexus_guidebook.pdf,data sheet,Google Nexus User Manual,Google Nexus User
Manual,application/pdf,Wed Sep 30 11:30:00 PDT 2015,Thu Dec 29 10:30:00 PST
2016,549,USD,10,1,1,2A1-03,1,,5,10
1,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,SMARTPHONE,,,,,,,,,1,http://10.132.169.202:8888/
myapp/main.jpeg,detail,Google Nexus main image,Google Nexus main image,image/jpeg,
6,http://10.138.169.202:8888/myapp/nexus_manual.pdf,data_sheet,Google Nexus
Guidebook,Google Nexus Guidebook,application/pdf,Wed Sep 30 11:30:00 PDT 2015,Thu
Dec 29 10:30:00 PST 2016,340,USD,20,1,1,2A1-04,1,,
1,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,Nexus,,,,,,,,,2,http://10.138.169.202:8888/myapp/
moto_aux1.jpeg,detail,Google Nexus side left image,Google Nexus side left
image,image/jpeg,,,,,,Wed Sep 30 11:30:00 PDT 2015,Thu Dec 29 10:30:00 PST
2016,935,USD,30,1,1,2A1-01,32,,
1,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,Android,,,,,,,,,3,http://10.138.169.202:8888/
myapp/moto_aux2.jpeg,detail,Google Nexus side right image,Google Nexus side right
image,image/jpeg,,,,,,,,,,,,,1,2A1-0,32,,
1,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,Motorola,,,,,,,,,4,http://10.138.169.202:8888/
myapp/moto_aux3.jpeg,detail,Google Nexus backside image,Google Nexus backside
image,image/jpeg,,,,,,,,,,,,,,,,
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2,SID497,KlickShop Testlieferant DB AG,,2A1-01,,,,,Nexus Wireless Charger for
Nexus Smartphones/Tablets,C62,25,,,,89.9,USD,FALSE,,,,,FALSE,deu,,,
{UNSPSC=44111501;},DE,Nexus Wireless Charger for Nexus Smartphones/
Tablets,FALSE,FALSE,FALSE,FALSE,FALSE,Charger,,,,,,,,,,,,,Wed Sep 30 11:30:00
PDT 2015,Wed Dec 31 16:00:00 PST 1969,89.9,USD,1,1,,,,,1,10
2,,,,,,,,,,,,,,,,,,,,,,,,Nexus,,,,,,,,,,,,,,,,,,,,,,,,
2,,,,,,,,,,,,,,,,,,,,,,,,Wireless,,,,,,,,,,,,,,,,,,,,,,,,
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3,SID497,KlickShop Testlieferant DB AG,,2A1-02,,,,,"Motorola Micro USB Data Cable-
Compatible with Motorola Droid RARZ, RAZR Maxx, Droid 3, Droid
4",C62,14,,,,25,USD,FALSE,,,,,FALSE,deu,,,{UNSPSC=44111501;},DE,Motorola Micro USB
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3,,,,,,,,,,,,,,,,,,,,,,,,Cable,,,,,,,,,,,,,,,,,,,,,,,,
3,,,,,,,,,,,,,,,,,,,,,,,,Motorola,,,,,,,,,,,,,,,,,,,,,,,,
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4,SID497,KlickShop Testlieferant DB AG,,2A1-03,,,,,"Nexus 7 Case,Gold Slim-Fit
Smart Case Cover for Google",C62,14,,,,90,USD,FALSE,,,,,FALSE,deu,,,
{UNSPSC=44111501;},DE,"Nexus 7 Case,Gold Slim-Fit Smart Case Cover for Google
Nexus",FALSE,FALSE,FALSE,FALSE,FALSE,FALSE,Case,,,,,,,,,,,,,Wed Sep 30 11:30:00 PDT
2015,Wed Dec 31 16:00:00 PST 1969,90,USD,1,1,,,,,1,1
4,,,,,,,,,,,,,,,,,,,,,,,,Cover,,,,,,,,,,,,,,,,,,,,,,,,
4,,,,,,,,,,,,,,,,,,,,,,,,Motorola,,,,,,,,,,,,,,,,,,,,,,,,
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5,SID497,KlickShop Testlieferant DB AG,,2A1-04,,,,,"Nexus 7 Case,Gold Slim-Fit
Smart Case Cover for Google Nexus 7 2013 Tablet w/
Stand",C62,14,,,,80,USD,FALSE,,,,,FALSE,deu,,,{UNSPSC=44111501;},DE,"Nexus 7
Case,Gold Slim-Fit Smart Case Cover for Google
Nexus",FALSE,FALSE,FALSE,FALSE,FALSE,FALSE,Case,,,,,,,,,,,,,Wed Sep 30 11:30:00 PDT
2015,Wed Dec 31 16:00:00 PST 1969,80,USD,1,1,,,,,1,1
5,,,,,,,,,,,,,,,,,,,,,,,,Cover,,,,,,,,,,,,,,,,,,,,,,,,
5,,,,,,,,,,,,,,,,,,,,,,,,Motorola,,,,,,,,,,,,,,,,,,,,,,,,

```

Procedure

1. Navigate to ► **Catalog Content Manager** ► **Content Documents** ► to view a list of the imported catalogs.
2. Locate the catalog content document that you want to export, click **Actions** and select **Download**.

The catalog is downloaded in CSV format. You are prompted to open or save the file.

How to view catalog content reports

You can use the available catalog content reports to analyze your imported catalog content.

Context

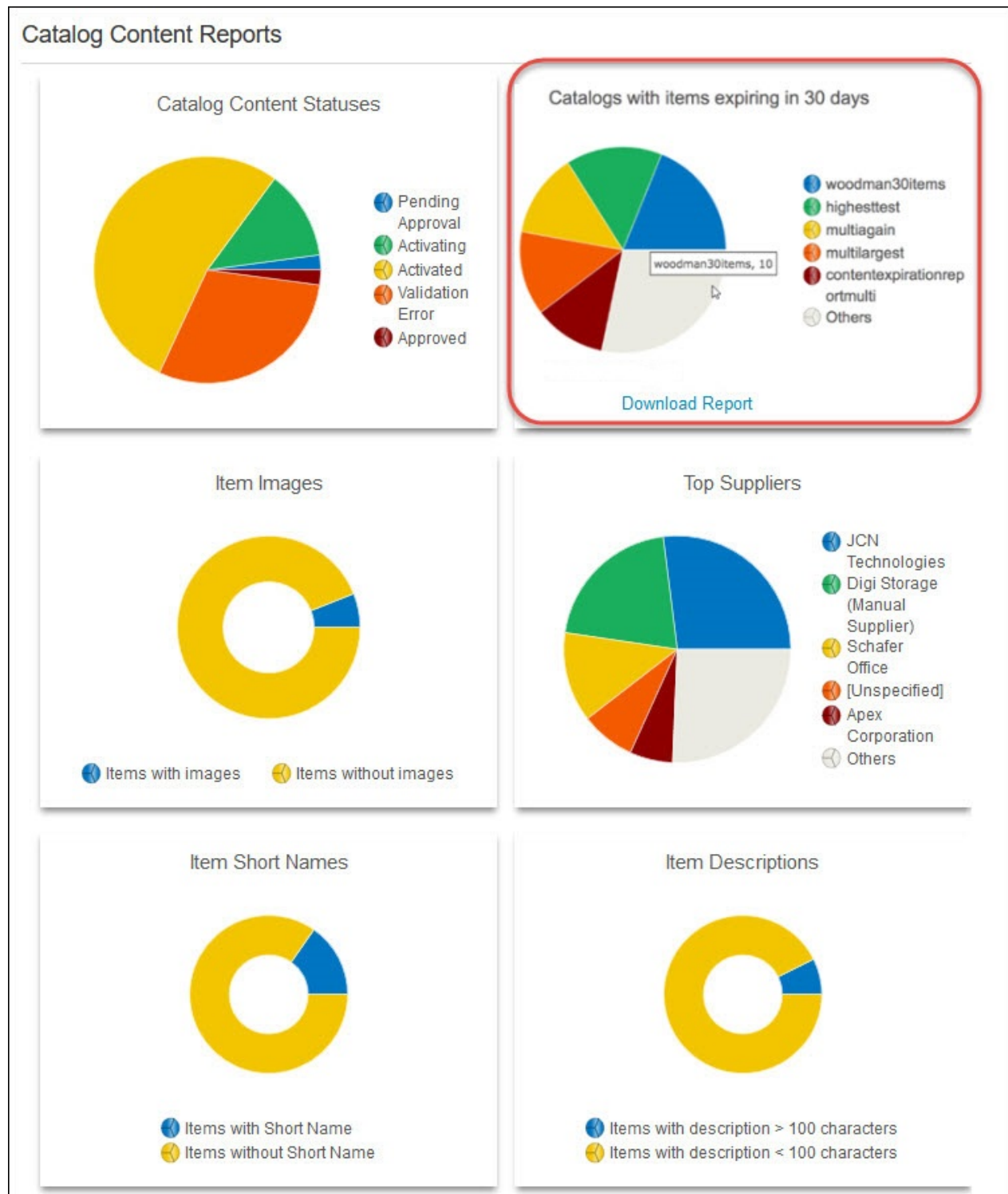
The default catalog content reports that are available allow you to analyze your catalog data. For example, you can view the number of catalogs that have been activated and the number of catalogs that have failed validation. The following reports are available:

- **Catalog Content Statuses:** represents the number of catalogs in various statuses.
- **Catalogs with items expiring in 30 days:** report the various catalogs that contain items that expire within the next 30 days.
- **Top Suppliers:** indicates the suppliers with the most number of items.
- **Item Images:** compares the number of items that have images and those that do not.
- **Item Short Names:** compares the number of items that have short names and those that do not.
- **Item Descriptions:** compares the number of items that have a description greater than 100 characters and those that have a description less than 100 characters

The **Catalogs with items expiring in 30 days** report is displayed as a pie chart with each slice indicating one catalog. A maximum of 6 catalogs are displayed as individual slices. If there are more than 6 catalogs, then the top five catalogs that contain the maximum number of expiring items are displayed as individual slices and the other catalogs are grouped and displayed as **Other** slice. You can view the name of the catalog and the number of items expiring when you hover the mouse pointer over a slice in the pie chart. Catalog managers can also download this report data in an Excel format by clicking the **Download Report** link.

To view the catalog content reports, navigate to ► **Catalog Content Manager** ► **Catalog Content Reports** ► in the **Ariba Administrator**.

A sample report is as follows:



Procedure

1. In the Ariba Administrator page navigate to ► **Catalog Content Manager** ► **Catalog Content Reports** ►.

The page displays the following pie chart reports:

- **Catalog Content Statuses**
 - **Catalogs with items expiring in 30 days**
 - **Top Suppliers**
 - **Item Short Names**
 - **Item Images**
 - **Item Descriptions**
2. To view the details of a particular sector of a chart, click the slice or the specific name in the chart legend.

Topics about approving subsets of items in a catalog

Approving subsets of items in a catalog

Sites enabled for managing catalogs using the content management system (CMS) can be configured such that, the items in a catalog can be divided into different sets, and different approvers can be assigned to approve these different sets of items.

Catalog Managers can define catalog content approval rules based on lookup files, to group the items in the catalog into separate sets, and assign an individual user (or a group) to each set as an approver. .

For example, the items in a catalog can be divided into different sets based on their classification codes. A separate catalog approval request is created for each set of items and assigned to a user (or a group) for approval. Users can delete individual items in the catalog approval request document by exporting the items in a CSV format, updating the **Cleanse** field value with **Yes** or **No** to approve or deny the item, and then importing the updated file. They can then approve or deny the entire document.

After all the associated catalog approval requests have been approved by the individual approvers in the CMS, the content document moves to the **Validated** status and a second-level approval of catalog subscriptions is triggered. If one or more catalog approval requests are denied, the content document moves to the **Approval Denied** status.

You site can also be configured such that, the second-level approval of catalog subscriptions is not triggered after the associated catalog content document-level approval requests have been approved by approvers in the CMS. When configured to skip the second-level approval, the catalog subscription is automatically approved after the content document-level approval requests have been approved by approvers in the CMS.

i Note

- Catalog approval requests pending action are not escalated
- Suppliers are not notified when a catalog is not approved
- Approval rules are not executed when you revalidate catalog content documents

Workflow of approving subsets of items in a catalog

Assigning approvers to subsets of items in a catalog involves the following high-level steps:

1. A catalog manager creates approval lookup files with relevant data based on the business requirements.
2. The catalog manager then imports the approval lookup files and maps the lookup fields to the relevant catalog fields.
3. The catalog manager then creates the required approval rules based on the approval lookups to assign approvers to the items in the catalog.
4. When a catalog is imported, an associated catalog content document is created and processed by the content management system (cms) based on the defined catalog content rules.

- The approval rules are triggered after the cleansing, validation, and enrichment rules are executed.
- Depending on the approval rule configurations, one or more catalog approval requests are created with subsets of items from the catalog content document and assigned to the relevant users or groups for approval. The content document moves to the **Waiting for Approval** status.
 - Users then access the catalog approval requests assigned to them from the **To Do** content item on the **Home** dashboards.
 - Users then delete individual items in the catalog approval request document if required and then approve or deny the entire document.
 - After all the associated catalog approval request documents have been approved, the content document moves to the **Validated** status. If one or more catalog approval requests are denied, the content document moves to the **Approval Denied** status.

How to create an approval lookup

Context

You create new approval lookups by importing approval lookup files, and mapping the column field to a relevant catalog field.

Approval lookup files enable you to specify the catalog field based on which the items are to be grouped into sets, and the approvers to be assigned for each set. You can create approval rules based on lookup files to assign approvers to the different sets of items in a catalog.

You import lookup files in CSV file format and can use any text editor to create the file. A sample approval lookup file is as follows:

```
ManufacturerPartID,Approver
26111701,adavis
26111702,jrice
26112904,Catalog Approvers
```

Note

If an approver that you specify in the lookup file is not available in the system, the **Catalog Approvers** group is assigned by default.

Procedure

- In the Ariba Administrator page navigate to ► **Catalog Content Manager** ► **Lookup Files** ►. The page displays the list of previously imported lookup files if available.
- Click **New Lookup File** and select **Approval Lookup**.

Lookup Files

9
All

9
Active

0
Failed

0
Parsing

	Lookup Name	Fields	Status	Type	Last Modified	
<input type="checkbox"/>	ApprovalLookup_Sup...	SupplierPartId, Appr...	Active	Approval	09 March 2018 11:10...	Action ▾
<input type="checkbox"/>	ApprovalLookup-Lea...	LeadTime, Approver	Active	Approval	07 March 2018 3:54 ...	Action ▾
<input type="checkbox"/>	ApprovalFlow_Large...	Price, Approver	Active	Approval	06 March 2018 4:36 ...	Action ▾
<input type="checkbox"/>	ApprovalLookup-Larg...	LeadTime, Approver	Active	Approval	06 March 2018 12:2...	Action ▾
<input type="checkbox"/>	DeleteGT_ApprovalFl...	SupplierId, Approver	Active	Approval	28 February 2018 12...	Action ▾
<input type="checkbox"/>	ApprovalLookup-Use...	SupplierPartId, Appr...	Active	Approval	23 February 2018 10...	Action ▾
<input type="checkbox"/>	ApprovalLookup-Pur...	SupplierPartId, Appr...	Active	Approval	16 February 2018 2:...	Action ▾

↳

Delete

Refresh

New Lookup File ▾

Standard Lookup

Approval Lookup

- Enter a lookup name and click **Browse** to browse to the location of the file to import.
- Select a file and click **Import** to import it.

The mappings table is displayed with the lookup field from the imported file.

- Map the lookup field to a catalog field by selecting an appropriate field from the **Catalog Fields** column pull-down menu.

Import Approval Lookup

Lookup imported successfully

Lookup Name:

Lookup File: approver_lookup.csv

Mappings:

Lookup Fields	Catalog Fields
SupplierID	<input type="text" value="supplierid"/>

- Click **Activate** to activate the lookup.

How to create a catalog content approval rule

Context

You create catalog content approval rules based on approval lookups to assign approvers to sets of items in a catalog. For example, you can define an approval rule to assign specific approvers to specific sets of items in a catalog.

Procedure

- In the Ariba Administrator page navigate to ► **Catalog Content Manager** ► **Content Rules** ►.

The page displays the list of previously created rules if available.

- Click **New Rule** and select **Approval Rule** to create a new approval rule.
- Enter a descriptive name for the rule.
- Click **Select All** if you want the rule to be applicable to all supplier catalogs, or click **Edit** and select the suppliers from the list that you want the rule to be applicable to.
- Enter a description for the rule.

6. Select the approval lookup file that this rule is to be based on from the **Approval Lookup** pull-down menu.
7. Click **Save** to save the approval rule.

About approving catalog approval requests

Based on the defined catalog content approval rules and the associated approver lookups, one or more catalog approval requests are created for each catalog and approvers are assigned . As an approver you can view the catalog approval requests that have been assigned to you in the **To Do** pages of your **Home** dashboard.

You can approve or deny the individual items in the catalog approval request document by exporting the items in a CSV format, updating the **Cleanse** field value with Yes or No to approve or deny the item, and then importing the updated file. A sample catalog approval request export file is as follows:

[illegible]

Thumbnails.Source,Auxiliary Thumbnails.Purpose,Auxiliary
 Thumbnails.Alternative,Auxiliary Thumbnails.Description,Auxiliary
 Thumbnails.Type,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
 Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
 Thumbnails.Description,Auxiliary Thumbnails.Type,Auxiliary
 Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary Thumbnails.Purpose,Auxiliary
 Thumbnails.Alternative,Auxiliary Thumbnails.Description,Auxiliary
 Thumbnails.Type,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
 Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
 Thumbnails.Description,Auxiliary Thumbnails.Type,Auxiliary
 Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary Thumbnails.Purpose,Auxiliary
 Thumbnails.Alternative,Auxiliary Thumbnails.Description,Auxiliary
 Thumbnails.Type,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
 Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
 Thumbnails.Description,Auxiliary Thumbnails.Type,Auxiliary
 Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary Thumbnails.Purpose,Auxiliary
 Thumbnails.Alternative,Auxiliary Thumbnails.Description,Auxiliary
 Thumbnails.Type,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
 Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
 Thumbnails.Description,Auxiliary Thumbnails.Type,Auxiliary
 Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary Thumbnails.Purpose,Auxiliary
 Thumbnails.Alternative,Auxiliary Thumbnails.Description,Auxiliary
 Thumbnails.Type,Auxiliary Thumbnails.Order,Auxiliary Thumbnails.Source,Auxiliary
 Thumbnails.Purpose,Auxiliary Thumbnails.Alternative,Auxiliary
 Thumbnails.Description,Auxiliary
 Thumbnails.Type,Attachments.Order,Attachments.Source,Attachments.Purpose,Attachments
 .Alternative,Attachments.Description,Attachments.Type,Attachments.Order,Attachments.
 Source,Attachments.Purpose,Attachments.Alternative,Attachments.Description,Attachmen
 ts.Type,Attachments.Order,Attachments.Source,Attachments.Purpose,Attachments.Alterna
 tive,Attachments.Description,Attachments.Type,Attachments.Order,Attachments.Source,A
 ttachments.Purpose,Attachments.Alternative,Attachments.Description,Attachments.Type,
 Attachments.Order,Attachments.Source,Attachments.Purpose,Attachments.Alternative,Att
 achments.Description,Attachments.Type,Attachments.Order,Attachments.Source,Attachmen
 ts.Purpose,Attachments.Alternative,Attachments.Description,Attachments.Type,Attachme
 nts.Order,Attachments.Source,Attachments.Purpose,Attachments.Alternative,Attachments
 .Description,Attachments.Type,Attachments.Order,Attachments.Source,Attachments.Purpo
 se,Attachments.Alternative,Attachments.Description,Attachments.Type,Attachments.Orde
 r,Attachments.Source,Attachments.Purpose,Attachments.Alternative,Attachments.Descrip
 tion,Attachments.Type,Attachments.Order,Attachments.Source,Attachments.Purpose,Attac
 hments.Alternative,Attachments.Description,Attachments.Type,Related Item
 Info.Quantity,Related Item Info.Related Item Key,Related Item Info.Type,Related
 Item Info.Reference Description,Related Item Info.Quantity,Related Item
 Info.Related Item Key,Related Item Info.Type,Related Item Info.Reference
 Description,Related Item Info.Quantity,Related Item Info.Related Item Key,Related
 Item Info.Type,Related Item Info.Reference Description,Related Item
 Info.Quantity,Related Item Info.Related Item Key,Related Item Info.Type,Related
 Item Info.Reference Description,Related Item Info.Quantity,Related Item
 Info.Related Item Key,Related Item Info.Type,Related Item Info.Reference
 Description,Related Item Info.Quantity,Related Item Info.Related Item Key,Related
 Item Info.Type,Related Item Info.Reference Description,Related Item
 Info.Quantity,Related Item Info.Related Item Key,Related Item Info.Type,Related
 Item Info.Reference Description,Related Item Info.Quantity,Related Item
 Info.Related Item Key,Related Item Info.Type,Related Item Info.Reference
 Description,Related Item Info.Quantity,Related Item Info.Related Item Key,Related
 Item Info.Type,Related Item Info.Reference Description,Related Item
 Info.Quantity,Related Item Info.Related Item Key,Related Item Info.Type,Related
 Item Info.Reference Description,Quantity Interval,Minimum Quantity,Buyer Part
 ID,Active Price,New Price,Percentage Difference,Amount Difference
 1,New, **Yes**, sid496,AD8513,AD1113,Adapter,,, ,
 4,USD,,
 {UNSPSC=43211800;},EA,3,Hallmark Cables,config/SampleImages/
 hallmark_cables.html,config/SampleImages/
 hallmark_cables.html,,,FALSE,FALSE,en_US,,,,FALSE,FALSE,FALSE,FALSE,FALSE,,,,,,,,,
 /
 /
 /
 /
 /
 2,PriceModified, **Yes**, sid496,AD4515H,AD4515H,Adapter Power Mac/Monitor HD15F/HDI45M,,,
 43.95,USD,,

```
{UNSPSC=43211800;},EA,3,Hallmark Cables,config/SampleImages/  
hallmark_cables.html,config/SampleImages/  
hallmark_cables.html,,FALSE,FALSE,en_US,,,FALSE,FALSE,FALSE,FALSE,FALSE,,,,,,,,,  
,,,,,  
,,,,,"{"amount":  
42.95,"currency":""USD""},"{"amount":43.95,"currency":""USD""},0.02,1  
3,PriceModified,Yes,sid496,AD25361,AD25361,Adapter DB25F/CN36F,,,  
7.85,USD,,,,,,,,,,,,,  
{UNSPSC=43211800;},EA,3,Hallmark Cables,config/SampleImages/  
hallmark_cables.html,config/SampleImages/  
hallmark_cables.html,,FALSE,FALSE,en_US,,,FALSE,FALSE,FALSE,FALSE,FALSE,,,,,,,,,  
,,,,,  
,,,,,"{"amount":  
7.95,"currency":""USD""},"{"amount":7.85,"currency":""USD""},-0.01,-0.1  
4,Unmodified,No,sid496,AD25362,AD25362,Adapter DB25F/CN36M,,,  
7.95,USD,,,,,,,,,,,,,  
{UNSPSC=43211800;},EA,3,Hallmark Cables,config/SampleImages/  
hallmark_cables.html,config/SampleImages/  
hallmark_cables.html,,FALSE,FALSE,en_US,,,FALSE,FALSE,FALSE,FALSE,FALSE,,,,,,,,,  
,,,,,  
,,,,,
```

You then review your changes and approve or deny the entire catalog approval request.

i Note

When you approve the catalog approval request, individual items that you had denied will be deleted.

When you approve the catalog approval request, individual items that you had denied will be deleted.

Approving a catalog approval request

Context

One or more catalog approval requests are created for each catalog, and approvers are assigned to these requests based on the catalog content approval rules and the associated approver lookups. The catalog approval request is sent to the **To Do** pages of the corresponding approvers.

Procedure

1. Locate the catalog approval request in the **To Do** content item on the **Home** dashboard.

Alternatively, on the dashboard, click **Manage** **My To Do** to view your list of To Do items.

2. Click the catalog approval request ID to open the document.

The page displays the details of the contents of the approval request.

The **Comparison Summary** section displays the number of items grouped by the following statuses:

- **New**

- **Modified**
- **Modified Price**
- **Unmodified**
- **Deleted**

You can click each status to view a list of items in that particular status.

SDU21
Status: **Submitted**

testExcelParamteric-9thMar v1

These are the details of the catalog approval request. You can approve or deny individual items by exporting the items to a CSV file and importing them after updating the Cleanse column with Yes or No. You can then approve or deny all the items in the catalog approval request by clicking Approve or Deny.

Approve
Deny
Import
Export

Comparison Summary

3

New

0

Modified

0

Modified Price

0

Unmodified

0

Deleted

Supplier Part ID	Supplier Part Auxiliar...	Supplier Name	Description	Price	Price Configuration	Cleansed
2772882	111		4-Line System ...	2.19 USD	[{"StartDate":14937084	Pending
2772967	222		Excel 97 for Du...	32 USD	[{"StartDate":0,"EndDa	Pending

3. Click **Export** to export the list of items in the catalog approval request in a CSV format.
4. Update the **Cleanse** column of each item in the exported CSV file with **Yes** or **No**, to approve or deny the item.
5. Click **Import**, browse to the location of the updated CSV file and import it.

You can also import large files in a ZIP or gzip file format.

After your file is imported and processed successfully, the **Cleansed** column in the **Comparison Summary** section displays the approval status of the individual items.

6. Click **Approve** or **Deny** to approve or deny your changes to all the items in the catalog approval request.

Viewing the approval history of a catalog content document

Context

As a catalog manager, you can view the approval history of all the catalog approval requests of a catalog content document.

Procedure

1. Navigate to ► **Catalog Content Manager** ► **Content Documents** ► to view a list of the imported catalogs.
2. Locate the catalog content document that you want to view the approval history of, click **Actions** and select **View Approval History**.

The Approval History page displays the list of catalog approval requests generated for the selected content document and their approval status.

Approval History

JCN-Approval v1

SDU	Items	Approver	Approved By	Status	Submitted On	
SDU86	3	adavis		Pending	20 February 2018 5:33 PM	Action▼
SDU87	1	jrice		Pending	20 February 2018 5:33 PM	Action▼

Approve

Deny

Cancel

3. To approve or deny catalog approval requests that are in the **Pending** status, click **Actions** and select **Approve** or **Deny**.

Topics about configuring catalog search

Searching PunchOut items

You can use item-level PunchOut items to enable PunchOut-item search.

PunchOut items are items in the catalog that allow you to go directly to a supplier's website to select items. You can use item-level PunchOut items to enable PunchOut-item search.

By providing PunchOut catalogs at the item level, you or your suppliers can include descriptive text for each PunchOut item in the catalog file. You can then search on that text in the catalog before punching out to the supplier's website. For example, you can use the search string "computer repair 2015" to see all of the computer repair books published in 2015. In this way, you can choose the specific item you want to purchase from the search results before punching out to the supplier website.

You can relax the validation of PunchOut item catalogs when importing them into Ariba Administrator.

For more information about the format of PunchOut catalogs, including sample code, see *Catalog format reference*.

Related Information

[Displaying PunchOut items \[page 63\]](#)

Searching BMEcat catalogs

Searches for items in BMEcat catalogs are based not only on item names and short descriptions, but also on keywords defined for each item in the imported BMEcat catalog file. You or your suppliers can provide keywords to direct search results to specific items.

Search configuration

SAP Ariba solution runs some processes, such as stemming, fuzzy matching, and phonetic spell checking, automatically during catalog searches. If any of these processes produce search results that you find too large or confusing, contact SAP Ariba Customer Support.

Adding equivalent words

To make catalog searches more flexible, you can create a list of synonyms for the words that appear in the item descriptions.

For example, if an item description uses the word `blk` instead of `black`, you can add an entry for `blk` that specifies `black` as an equivalent word. Then a search for `black` would find the item.

By default, equivalent words are reciprocal. Users who type `black` would find items containing `blk` in their descriptions, and users who type `blk` would find items containing `black` in their descriptions.

Synonyms must be mapped to a word in one of the following fields in the catalog item:

- Description
- Manufacturer Name
- ProcureItemType
- ShortName
- Supplier Name
- All type-attribute definitions whose `Type` element is: `ShortName`, `Name`, or `Description`. For information about type-attribute definitions, see the *Catalog format reference*.

To create the list of synonyms, you add equivalent words to `EquivalentWords.csv`, which has the following format:

```
UTF8
WordKey,Locale,Equivalent
blk,en_US,black
bk,en_US,black block
wht,en_US,white
```

The `WordKey` value defines the word that appears in the catalog item. The value must be a single word and in lower case. The `Locale` value specifies the locale where the equivalent word is valid. The value must match the locale of the CIF catalog file and must be in lower case. The `Equivalent` value is the word for which users can search to find the item that includes `WordKey` value. You can enter multiple words for the `Equivalent` value.

After adding the words, you save the file and run the `Import Equivalent Words` data import task. Additionally, you need to rebuild the index for the equivalent words to take effect with existing catalogs.

Related Information

[How to run data import tasks \[page 162\]](#)

Searching category names

By default, the names of the categories in the catalog hierarchy are searchable. All the items associated with the category are displayed when you search by the category name.

Configuring the display of search results

When you search, the results can be displayed in a variety of ways. You can group results by category (the default) or supplier. You can also sort the results with the **View By** menu.

By default, the **View By** menu allows you to sort the results by price, relevance (the default if the search uses the OR operator), best selling, or name. However, within each subset (category, supplier, price), the search results display in random order by default. You can also specify whether to view the details of the items or view just a summary (the default).

In addition to the preferences you can set, SAP Ariba solution changes how search results are displayed based on the number of items found, the number of categories or suppliers associated with those items, and whether you are viewing the results in detail view or summary view.

Contact SAP Ariba Customer Support for help in controlling the way the results are displayed.

How to set relevance ranking

You can control the order in which the catalog search results are displayed by assigning attributes or entities to catalog items. Ranks can be set to these attributes/entities to specify the order in which they are to be considered in sorting the catalog search results.

Context

The order in which the search results are displayed depends on the different attributes/entities included and their designated ranks.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Relevance Ranking Designation** ►.

The **Relevance Ranking Designation** page opens, displaying the included designations and their current ranks.

3. At the bottom of the **Current Designations** table, click **Change**.
4. Select the attributes that you choose to include and set their priorities.
5. Click **Save**.

Related Information

[How to add a new relevance ranking designations \[page 148\]](#)

How to add a new relevance ranking designations

You can create and add new ranking designations to suit your search needs.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Relevance Ranking Designation** ►.

The **Relevance Ranking Designation** page opens, displaying the included designations and their current ranks.

3. At the bottom of the **Current Designations** table, click **Change**.
4. Click **Add**.
5. Select an attribute from the dropdown menu and set a priority level.
6. Click **Add** to add it to the current list.
7. Click **Save**.

Configuring catalog search options and filters

In SAP Ariba solution sites, you can control the display of catalog search options and the filters used to refine catalog search results.

For supplemental catalog fields (extensible fields), catalog managers determine which fields are available as advanced search options, which fields are available as search result filters, and the order in which the fields are presented to users. (These properties are intrinsically set for out-of-the-box catalog fields.)

The following figures show examples of search options and the search result filters that users see.

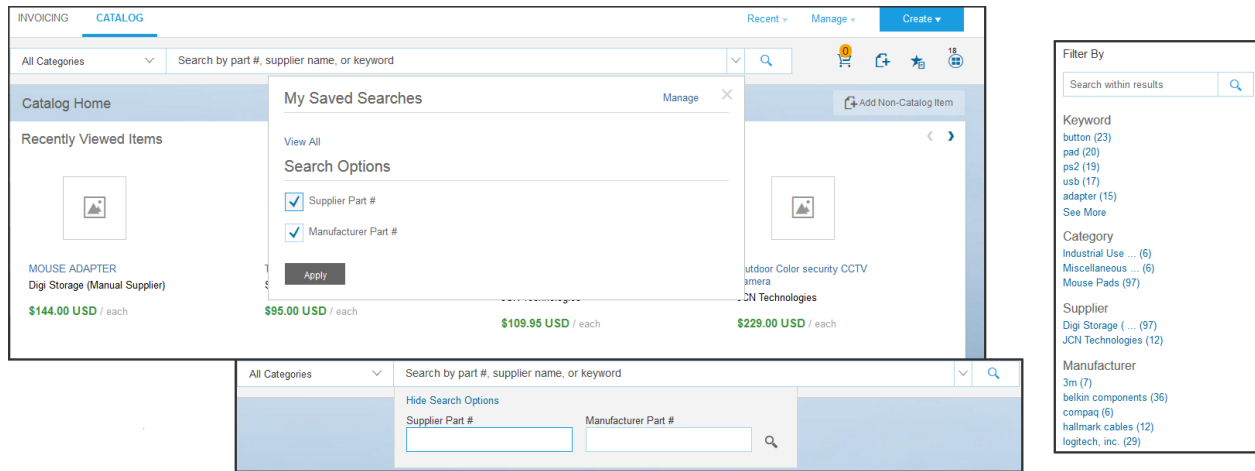


Figure 1: Examples of catalog search options and search result filters

When this feature is enabled, the **Catalog Manager** workspace in Ariba Administrator includes a page for configuring catalog search options and filters—the **Fields** tab, available through **Catalog Manager** > **Catalog Display Customization**.

When you edit a field on the **Fields** tab (by clicking the field's **Edit** button), the **Fields** tab changes to display a list of field properties that you can edit. Each extensible field has a predefined set of properties that can be configured. The property for including a field in catalog search options is called **Advanced Search Options**. The property for including a field in catalog search result filters is called **Refinable**.

Note

A field cannot be both a search option and a search result filter at the same time.

Related Information

[How to configure fields as catalog search options \[page 150\]](#)

[How to configure fields as catalog search result filters \[page 151\]](#)

[How to configure the default sort order of catalog search results \[page 152\]](#)

How to configure fields as catalog search options

Catalog managers can configure which extensible catalog fields are available to users as advanced search options and the order in which the fields are presented to users.

Prerequisites

Your site must be configured to enable configuration of catalog search options through the site configuration option `Application.Catalog.ExtensibleTypeAttributeConfiguration`, which SAP Ariba sets for you.

You must be a member of the **Customer Catalog Manager** group to configure catalog search options.

Procedure

1. On the command dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Catalog Display Customization** ►.
3. Find the **Advanced Search Option** attribute in the table, and select the checkbox in the **Enabled** column.

If the checkbox is not editable, check whether the **Refinable** property is disabled for the field. A field cannot be both a search option and a search result filter at the same time.
4. To determine the order in which search options are displayed, click the **Change Display Order** link in the **Action** column.

The **Edit Display Order** dialog box opens.

5. In the **Display Order** column, adjust the order by selecting a display order number from the dropdown menu for each field configured.

As you change the order numbers, the list is updated to reflect the new order.

6. Click **OK**, then click **Save**.

The SAP Ariba solution prompts you to confirm the changes.

7. Click **OK** to confirm the changes.

Results

The next time users go to the catalog, the search options are displayed as configured.

Related Information

[How to configure fields as catalog search options \[page 150\]](#)

[How to configure fields as catalog search result filters \[page 151\]](#)

[How to configure the default sort order of catalog search results \[page 152\]](#)

How to configure fields as catalog search result filters

Catalog managers can configure which extensible catalog fields are available to users as search result filters (in the **Filter By** section catalog search results) and the order in which the fields are presented to users.

Prerequisites





Your site must be configured to enable configuration of catalog search result filters through the site configuration option `Application.Catalog.ExtensibleTypeAttributeConfiguration`, which SAP Ariba sets for you.

You must be a member of the **Customer Catalog Manager** group to configure catalog search result filters.

Context

When you configure a field to be used as a search result filter by enabling the **Refinable** attribute, or when you disable this attribute, the catalog index is rebuilt to incorporate the changes. This can take a long time, depending on the size of your catalog.

Procedure

1. On the dashboard, click **Manage**  **Core Administration** .
2. Select **Catalog Manager**  **Catalog Display Customization** .
3. On the **Fields** tab, find the field you want to configure, and click **Edit**.
4. Find the **Refinable** attribute in the table, and select the checkbox in the **Enabled** column.

If the checkbox is not editable, check whether the **Advanced Search Option** property is disabled for the field. A field cannot be both a search option and a search result filter at the same time.
5. To determine the order in which search options are displayed, click the **Change Display Order** link in the **Action** column.

The **Edit Display Order** dialog box opens.
6. In the **Display Order** column, adjust the order by selecting a display order number from the dropdown menu for each field configured.
7. Click **OK**, then click **Save**.

The SAP Ariba solution prompts you to confirm the changes.

8. Click **OK** to confirm the changes.

Results

The next time users go to the catalog, the search result filters in the **Filter By** section are displayed as configured.

Related Information

[How to configure the default sort order of catalog search results \[page 152\]](#)

How to configure the default sort order of catalog search results

In SAP Ariba solution sites, you can change the default sort order for catalog search results. The default sort order is by relevance, which sorts items based on the best or most complete string match. You can change the default sort field to **Name**, **Price**, or **Best Selling**.

Prerequisites

Your site must be configured to enable configuration of catalog default sort order through the site configuration option `Application.Catalog.ExtensibleTypeAttributeConfiguration`, which SAP Ariba sets for you.

You must be a member of the **Customer Catalog Manager** group to configure catalog search result filters.

Procedure

1. On the dashboard, click **Manage** > **Core Administration**.
2. Select **Catalog Manager** > **Catalog Display Customization**.
3. On the **Fields** tab, search for any of the following sortable attributes:

Option	Description
Price	Sorts the items by price in ascending order. Catalog users can switch between ascending and descending order using the Sort by dropdown menu on the search results page.
Short Name	Sorts the items by name in ascending order. In the Sort by dropdown menu, this option is called Name . Users can switch between ascending and descending order.

Option	Description
Default Relevance	Sorts items by popularity. In the Sort by dropdown menu, this option is called Best Selling .

- Click the **Edit** button for the **Price**, **Short Name**, or **Default Relevance** field.
- Click the **Change Default Sort Order** link.

The **Edit Default Sort Order** dialog box opens, listing the sort options that users see in the **Sort by** dropdown menu.

- Select the field to use for the default sort order, and click **OK**.
- On the **Fields** tab, click **Save**.

A confirmation message appears.

- Review the changes, and click **OK** to save them.

Results

The next time users run a catalog search, the search results reflect the new default sort order.

Rebuilding the search index to improve search performance

The search index keeps track of all the catalog items, as well as mappings and other types of data. By keeping the index up to date, you ensure that users get accurate results when they search.

You can tune a search index for better overall performance by rebuilding the search index. Rebuild the search index whenever you do any of the following:

- Edit or add a valid mapping to the commodity code map that impacts a code in the catalog hierarchy or in an active catalog. If you delete or edit a code in such a way that results in an invalid mapping, rebuilding the index has no effect.
- Edit the catalog hierarchy.

To rebuild the index, use the **Catalog Manager > Index Builder** task in Ariba Administrator.

Rebuilding the index can take a long time depending on the size of your catalog, so you should only rebuild the index at night or when there are very few users logged in to the SAP Ariba solution. When the rebuild is complete, a status message is displayed on the **Index Builder** page.

Additional Ariba Administrator tasks

Additional Ariba Administrator tasks include working with generated subscriptions, building indexes, scheduling tasks, settings parameters, and imported and exporting data.

[How to view generated subscriptions \[page 154\]](#)

Subscriptions are generated when non-catalog items are defined in contracts through SAP Ariba Buying and Invoicing or SAP Ariba Invoice Management.

[How to rebuild a catalog index \[page 155\]](#)

Periodically rebuild a catalog's index to refresh item relevancy in searches. You must rebuild the index for each of your customers separately.

[Scheduled tasks \[page 156\]](#)

Scheduled tasks are processes that run on a regular basis, in the background. Most scheduled tasks are configured to run on a regular schedule, such as once every weekday starting at midnight.

[Parameters for search index, search results, and catalog imports \[page 159\]](#)

Your site can be configured to control the behavior of the search index, search results, and catalog imports by changing parameter values. Some parameters are available for self-service on the **Parameter** page of the **Catalog Manager**, but most parameters are set by SAP Ariba for your site.

[How to run data import tasks \[page 162\]](#)

You can run data import tasks, including **Import Catalog Views**, **Import Currency Mappings**, **Import Unit Of Measure Mappings**, and **Import Equivalent Words**. You can export validation rules.

[Exporting and importing validation rules \[page 163\]](#)

The customer catalog manager can export and import validation rules in the XML format. This is primarily used by the Ariba Customer Support team when migrating the validation rules from the test to the production site.

How to view generated subscriptions

Subscriptions are generated when non-catalog items are defined in contracts through SAP Ariba Buying and Invoicing or SAP Ariba Invoice Management.

Context

Subscriptions are activated when the related contract is approved and are deactivated when the related contract expires or is closed.

i Note





When a related contract is activated, the subscriptions to be published are queued in batches and are published every two hours. However, when a related contract is deactivated, the subscriptions are published immediately.

You use the ► **Catalog Manager** ► **Generated Subscriptions** ► task in Ariba Administrator to view information about generated subscriptions.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Generated Subscriptions** ►.
3. Use the search filters or click **List All** to display a list of generated subscriptions.
4. To compare different versions of a subscription, click the checkboxes for those versions, then click **Compare Versions**.
5. Select the newer generated subscription version in the **Select Version to Compare** chooser. This field is marked with **Currently viewed version** to indicate the newer version.
6. Select the activated version or an older deactivated version of the same subscription in the **Select Version to Compare Against** chooser.

If you selected subscriptions on the **Generated Subscriptions** page, the versions are already selected.

7. From the **Separately list items with** menu, select the method of price change, then enter the percent of change, for items you want to list separately in the comparison.
8. Click **Compare**.
9. To see errors associated with a subscription, to view the contents of a subscription, and to see summary and history information, click the link in the **Version** column. The **View Error tool**  is active by default.
 - To see which items are covered by the subscription, click the **View Content tool** .
 - To see a summary of the subscription, click the **Summary tool** .
 - To view the history associated with the subscription, click the **History tool** .

How to rebuild a catalog index

Periodically rebuild a catalog's index to refresh item relevancy in searches. You must rebuild the index for each of your customers separately.

Prerequisites

If a type definition file is enabled for a catalog, but not activated, activate the file before building the index.

Context

SAP Ariba solution records each time an item is ordered, and use this information to rate item relevance in search results. Therefore you should rebuild the index to refresh the relevancy.

Relevance for items is maintained even when a new version of a supplier catalog is imported. Highly popular items continue to be listed as highly popular items after loading a new catalog version.

You need to rebuild the index for each of your customers separately.

Procedure

1. On the dashboard, click **Manage > Core Administration**.
2. Select **Catalog Manager > Index Builder**.
3. Check the current system index status under **Catalog Publishing Requests Outstanding**.
Do not start a rebuild if there are already outstanding catalog publishing requests.
4. View the guidelines under **Start Next Index Rebuild** about when to rebuild the index or the state of the current rebuild.
5. If any catalogs contain previews, indicate whether you want to keep the previews intact with the **Keep previews** checkbox:

If you select the checkbox, all existing catalog previews are regenerated with updated information when the index is rebuilt.

If you do not select the checkbox, any existing catalog previews are deleted when the index is rebuilt.
6. Click **Rebuild**.

A progress bar appears, indicating that the index is being rebuilt. This process can take several hours.

Scheduled tasks

Scheduled tasks are processes that run on a regular basis, in the background. Most scheduled tasks are configured to run on a regular schedule, such as once every weekday starting at midnight.

Scheduled tasks for catalogs include:

- [Ariba Network Full Subscription Synchronization \[page 157\]](#)
- [Initialize Default Validation Rules \[page 158\]](#)
- [Generate Catalog Hierarchy from Commodity Codes \[page 158\]](#)
- [Generate Catalog Item Counts Based on Supplier for Reporting \[page 159\]](#)
- [Refresh Kits From Catalog Items \[page 159\]](#)
- [Update Price Availability Information for Catalogs \[page 159\]](#)

If you do not want to wait for a scheduled task to run at its regularly scheduled time, you can run it manually from Ariba Administrator.

How to manually run a scheduled task

You can opt to run a scheduled task manually at any time rather than waiting for it to run as scheduled.

Prerequisites

Before running any scheduled task, be aware of how it affects the system.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Scheduled Tasks** ►.
3. Search for the scheduled task you want to run, or click **List All** to see all tasks.
4. Click the **Run** button for the scheduled task, and click **OK** to confirm that you want to run the task.

The **Run** button is hidden while a scheduled task is running.

5. To update the scheduled task's status, click **Refresh Status**.

The status **Running** indicates a run is in progress.

Ariba Network Full Subscription Synchronization scheduled task

The **Ariba Network Full Subscription Synchronization** scheduled task synchronizes the catalog data for all available catalog subscriptions in the SAP Ariba solution with Ariba Network.

This task reads information about all available catalog subscriptions from Ariba Network and imports the catalogs to reflect that information in the SAP Ariba solution. This task is used when first setting up the SAP Ariba solution or integrating it with Ariba Network. After its initial run, use the **Ariba Network Full Subscription Synchronization** scheduled task to import product catalogs from Ariba Network.

You can configure the task to be run manually or automatically by the `Application.Catalog.AutoANSubscriptionSync` parameter value. If the value is set to **Yes**, the task runs automatically at an interval specified by the `Application.Catalog.AutoANSubscriptionSyncInterval` parameter value. If the value is set to **No**, a user belonging to the **Customer Catalog Manager** group must run the **Ariba Network Full Subscription Synchronization** scheduled task manually to download the catalogs from Ariba Network.

The `Application.Catalog.AutoANSubscriptionSyncInterval` parameter specifies the time interval in hours at which the **Ariba Network Full Subscription Synchronization** scheduled task runs automatically in a given day. For example, if the parameter value is set to 4, the task runs every four hours. You can specify any value between 2 and 12. Any values specified lower than 2 or higher than 12 are set as 2 and 12 respectively. The default value of this parameter is 12.

Initialize Default Validation Rules scheduled task

The **Initialize Default Validation Rules** scheduled task resets the validation rules in the SAP Ariba solution to the default global validation rule set.

How to load the default validation rule set

You can reset the default global validation rule set at any time. Resetting the default overwrites any rules you may have created or modified.

Prerequisites

If you have created or edited the catalog's current validation rule set, back up the current rule set before resetting the default validation rule set to preserve a copy of your customized rules.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Scheduled Tasks** ►.
3. Search for the task **Initialize Default Validation Rules** or click **List All**.
4. Click **Run** for the **Initialize Default Validation Rules** task, and click **OK** to confirm.

Generate Catalog Hierarchy from Commodity Codes scheduled task

The **Generate Catalog Hierarchy from Commodity Codes** scheduled task generates the catalog hierarchy based on the system commodity codes.

The catalog hierarchy is generated in the English (en_US) locale only, even if the locale configured for the site or the user's preferred locale is a non-english locale. Use the ► **Catalog Manager** ► **Hierarchy Editor** ► task to translate the names if required.

Generate Catalog Item Counts Based on Supplier for Reporting scheduled task

The scheduled task **Generate catalog item counts based on supplier for reporting** generates the count of catalog items based on supplier for reporting. This task is set to run every 7 days by default. You can configure the frequency of this task by the `GenerateReportingEntriesSchedule` parameter value.

Refresh Kits From Catalog Items scheduled task

The scheduled task **Refresh Kits From Catalog Items** checks catalog kits for price changes and inactive catalog items. The scheduled task updates the price of individual catalog items in a catalog kit, as well as the entire catalog kit price.

If there are inactive catalog items, the scheduled task sends a notification message to users who belong to the **Customer Catalog Manager** group. Catalog items can become inactive if they are deactivated or if they contain an expired expiration date.

In the default configuration, this scheduled task is set to run every weekday at 5 PM.

Update Price Availability Information for Catalogs scheduled task

The scheduled task **Update price availability information for catalogs** synchronizes price and availability information with the supplier for all catalogs.

Parameters for search index, search results, and catalog imports

Your site can be configured to control the behavior of the search index, search results, and catalog imports by changing parameter values. Some parameters are available for self-service on the **Parameter** page of the **Catalog Manager**, but most parameters are set by SAP Ariba for your site.

Catalog hierarchy

The `Application.Catalog.MinCategorySizeForCategoricView` parameter specifies whether the catalog search results are displayed as individual catalog items or grouped in categories, depending on the page size and the number of items in the catalogs. The value for this parameter is an integer.

When the value is set to less than or equal to zero, the categorical view is displayed.

When the value is set to greater than zero, say X, then:

- If the number of search results is greater than the page size, then the categorical view is displayed.
- If the number of search results is less than or equal to the page size and there are a minimum of two sub-categories that have at least X number of items, then the category view is displayed else the individual catalog items are displayed.

The default value of this parameter is 10.

Generate reporting entries schedule

The `Application.Catalog.GenerateReportingEntriesSchedule` parameter specifies the schedule in days for generating catalog reporting entries. The value is an integer.

The default value is 7 days. If set to 0 or less, the default value is applied.

Catalog use status

The `Application.Catalog.SendCatalogUseStatus` parameter triggers cXML notifications sent to suppliers when a user acts upon a catalog.

The parameter takes a Boolean value. When set to **Yes**, cXML notifications are sent to suppliers when a user activates, deactivates, or deletes a catalog. The default value is **Yes**.

Catalog subscription synchronization

Members of the Customer Catalog Manager or Customer Administrator group can schedule the **Ariba Network Full Subscription Synchronization** scheduled task by setting the the `Application.Catalog.AutoANSubscriptionSync` and `Application.Catalog.AutoANSubscriptionSyncInterval` parameters.

The `Application.Catalog.AutoANSubscriptionSync` configures the **Ariba Network Full Subscription Synchronization** scheduled task. This parameter boolean value determines whether or not the catalog subscriptions are downloaded from Ariba Network automatically at a interval specified by the `Application.Catalog.AutoANSubscriptionSyncInterval` parameter value or manually downloaded.

The default value for this parameter is **No**. If the value is set to **No**, a member of the **Customer Catalog Manager** group must run the **Ariba Network Full Subscription Synchronization** scheduled task manually to download the catalogs from Ariba Network.

The `Application.Catalog.AutoANSubscriptionSyncInterval` parameter specifies the time interval in hours at which the **Ariba Network Full Subscription Synchronization** task runs automatically in a given day. For example, if the parameter value is set to 4, the task runs every four hours. You can specify any value between 2 and 12. Any values specified lower than 2 or higher than 12 are set as 2 and 12 respectively. The default value of this parameter is 12.

For more information, see [How to configure the Ariba Network Full Subscription Synchronization scheduled task \[page 161\]](#).

Catalog image validation

The `Application.Catalog.ImageValidation.Download` parameter is used to configure whether the images and thumbnails have to be downloaded when the **Ariba Network Full Subscription Synchronization** scheduled task is run.

The default value for this parameter is **No**.

If the value is set to **Yes**, images and thumbnails are validated and downloaded as part of catalog validation when the **Ariba Network Full Subscription Synchronization** task is run.

Catalog item loader thread count

The `Application.Catalog.ItemLoader.ThreadCount` parameter is used to configure the number of concurrent threads used to import catalog items. If your CPU usage appears to be under-utilized, set this to a higher number. The default value is 4.

BMEcat catalog import

The `Application.Catalog.CMSEnabled` parameter specifies whether or not the content management system for catalog content is enabled. The content management system is required for importing BMEcat-format catalogs. The default value is **No**.

[How to configure the Ariba Network Full Subscription Synchronization scheduled task \[page 161\]](#)

How to configure the Ariba Network Full Subscription Synchronization scheduled task

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Select ► **Catalog Manager** ► **Parameters** ►.
3. Locate the `Application.Catalog.AutoANSubscriptionSync` parameter, and select **Yes** or **No**.
 - **Yes**: to run the task automatically at a specified interval in hours in a given day.
 - **No**: to run the task manually to synchronize the catalogs.

4. If you chose to run the **Ariba Network Full Subscription Synchronization** scheduled task automatically and want to specify the interval in hours, then enter a value between 2 and 12 as required for the `Application.Catalog.AutoANSubscriptionSyncInterval` parameter.
5. Click **Save** to save your changes.

How to run data import tasks

You can run data import tasks, including **Import Catalog Views**, **Import Currency Mappings**, **Import Unit Of Measure Mappings**, and **Import Equivalent Words**. You can export validation rules.

Context

The following table describes the data import tasks that you can run.

Data Import Task	Description	Data File
Import Catalog Views	Imports catalog views for SAP Ariba solutions.	<code>CustomCatalog.csv</code>
Import Currency Mappings	Imports the mappings between canonical currencies and the currencies in the system.	<code>CurrencyMap.csv</code>
Import Unit Of Measure Mapping	This task defines mappings for UNCEFACT (also called UNUOM) units of measure. It translates between canonical units of measure and the units of measure in a partition.	<code>UnitsOfMeasureMap.csv</code>
Import Equivalent Words	Defines a set of words that is handled as synonyms when the user sets up a catalog search.	<code>EquivalentWords.csv</code>

Procedure

1. Open the **Catalog Manager** workspace, then click the **Data Import/Export** task.
2. Click **Import** against a task.
3. Select an import operation and click **Browse** to select and enter the location of the data file.
4. Click **Run** to run the data import task.
5. Click **Refresh Status** to refresh the screen to show the current status.

Exporting and importing validation rules

The customer catalog manager can export and import validation rules in the XML format. This is primarily used by the Ariba Customer Support team when migrating the validation rules from the test to the production site.

You can export the catalog validation rules from the SAP Ariba solution in the XML format.

How to import validation rules

You can import the catalog validation rules to the SAP Ariba solution in an XML format.

Prerequisites

You must be a member of the **Customer Catalog Manager** group in order to import validation rules.

Procedure

1. On the dashboard, click ► **Manage** ► **Core Administration** ►.
2. Click **Catalog Manager**.
3. Click **Catalog Validation Rules**.
4. Click **Import Validation Rules**.
5. Browse to the location of the catalog validation rules file and click **Import**.




How to export validation rules

You export validation rules in XML format.

Prerequisites

You must be a member of the **Customer Catalog Manager** group in order to export validation rules.

Procedure

1. On the dashboard, click  **Manage**  **Core Administration** .
2. Click **Catalog Manager**.
3. Click **Catalog Validation Rules**.
4. Click **Export Validation Rules**.

Next Steps



SAP Ariba recommends that you do not edit the exported XML file and then import it as it may cause problems.

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