



Informatica MDM – Product 360

Supplier Portal – User manual, User

Version 10.1 (English)

Informatica PIM - Supplier Portal
Version 10.1
December 2020

© Copyright Informatica LLC 1993, 2020

This software and documentation are provided only under a separate license agreement containing restrictions on use and disclosure. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC.

A current list of Informatica trademarks is available on the web at
<https://www.informatica.com/trademarks.html>.

The information in this documentation is subject to change without notice. If you find any problems in this documentation, please report them to us in writing at Informatica LLC 2100 Seaport Blvd. Redwood City, CA 94063.

Informatica products are warranted according to the terms and conditions of the agreements under which they are provided.

INFORMATICA LLC PROVIDES THE INFORMATION IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT.

Table of Contents

1 Informatica MDM - Product 360 - Supplier Portal.....	4
1.1 Typographic conventions.....	4
1.2 Operating instructions.....	4
2 Dashboard.....	6
3 Timeline.....	7
3.1 Replying to messages.....	8
3.2 Sending messages.....	9
3.3 Filtering messages.....	10
3.4 Deleting messages.....	11
..4 Catalogs.....	12
4.1 Uploading catalog data.....	12
4.2 Uploading catalog data using PIM Media Manager	13
4.3 Viewing catalog details.....	15
4.4 Viewing the item list.....	16
4.5 Editing items.....	16
4.5.1 Uploading Media Documents to a Catalog.....	17
4.6 Viewing test run reports.....	18
4.7 Viewing import reports.....	19
..5 Organization management.....	21
5.1 Viewing and editing user details.....	22
5.2 Creating users.....	23
5.3 Recalling an invitation/deleting a user.....	23
5.4 Resending an invitation.....	24
5.5 Deactivating users.....	24
5.6 Activating users.....	25
5.7 Resetting a user's password.....	25
5.8 Removing users.....	26
..6 Editing personal settings.....	27
..7 Performance statistics.....	28
..8 Switch supplier context (Broker).....	29
...Index.....	30

1 Informatica MDM - Product 360 - Supplier Portal

The portal solution Informatica MDM - Product 360 - Supplier Portal from Informatica Corporation makes it easier to integrate your catalogs into your PIM organization's product management system. With a simple user interface similar to Facebook, you can communicate conveniently with your PIM organization. Messages can contain links and attachments. This means that it is possible to communicate using only the portal where everything is documented accordingly. This makes product launches much faster, particularly with extremely large assortments.

1.1 Typographic conventions


This documentation uses the following conventions:

1. Instructions are numbered step by step.
2. This is the second step in the instructions.
 - ⇒ System responses are indicated by an arrow.
 - Names of screen items appear in quotation marks: "User name".
 - Names of buttons are highlighted in color: **Delete**.
 - Paths, file names and console entries are shown in a different font to make the distinction clear immediately: C:\Program Files\.

Text markings at various points indicate special instructions, tips, or warnings, as the following examples show:

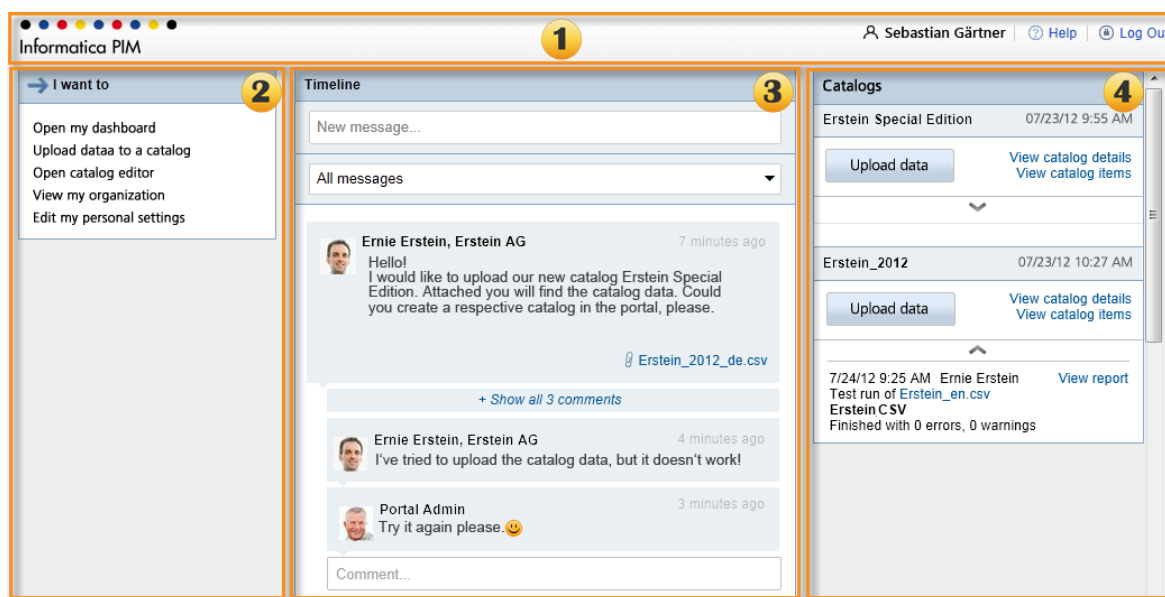
 **Note:** You will find information about special features here.

 **Tip:** You will find tips and assistance here.

 **Caution:** Warnings about sources of errors and how to avoid them appear here.

1.2 Operating instructions

In general, you see the program interface that your administrator assigned to you according to your user profile. This means that certain views or fields are shown or hidden, depending on your authorization. We will show you the standard configuration here.



The user interface

The program interface is divided into the following areas:

Area	Description
1	At the top is the header area . The header area provides information about the user name under which you are logged in and allows you to log out of the system. You can also call up the online help from the header area.
2	On the left is the menu area . Here, you can select which actions you want to perform.
3	In the center is the action area . Depending on which action you have selected in the menu area, this is where the corresponding information is displayed or where you can perform the selected action.
4	Your catalogs are listed under " Catalogs " ¹² on the right. From here, you can upload catalog data directly into the portal ¹² , display the catalog details ¹⁵ for the relevant catalog, and, depending on the configuration, edit the catalog items ¹⁶ . The most recent update operations are also displayed for each catalog.



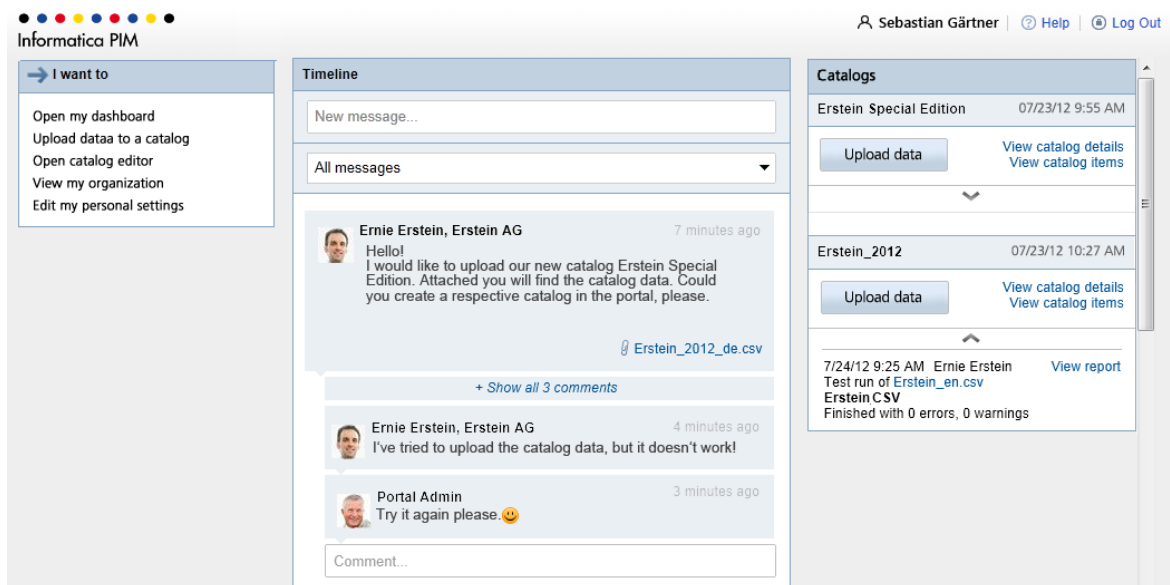
Note: The dashboard view is updated automatically.

2 Dashboard

The "dashboard" provides a central reference point. You can navigate to it at any time by clicking on **Open my dashboard** in the menu area.

The "[Timeline](#)"^[7] contains messages and system messages about the [progress of test runs](#), [import releases](#),^[18] and [import runs](#).^[19] From here, you can also communicate with the retailer's portal administrator.

Your catalogs are listed under "[Catalogs](#)"^[12] on the right. From here, you can [upload catalog data directly into the portal](#)^[12], display the [catalog details](#)^[15] for the relevant catalog, and, depending on the configuration, [view or edit the catalog items](#)^[16]. The most recent update operations are also displayed for each catalog.



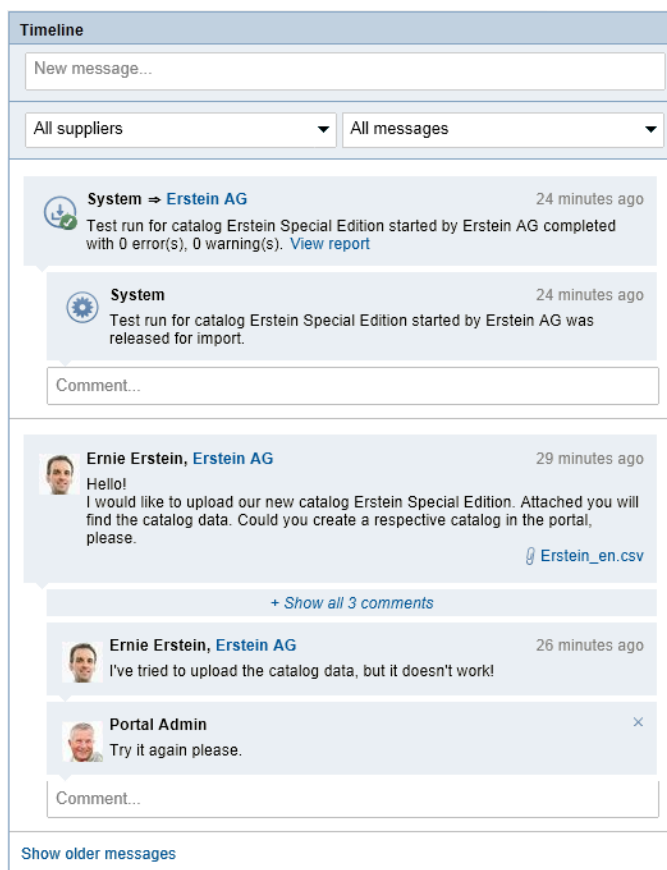
The screenshot displays the Informatica PIM dashboard. At the top left, the Informatica PIM logo is shown. Below it, a sidebar menu titled "I want to" lists several actions: "Open my dashboard", "Upload data to a catalog", "Open catalog editor", "View my organization", and "Edit my personal settings". The main content area is divided into two sections. The left section, titled "Timeline", features a "New message..." input field, a dropdown menu set to "All messages", and a list of messages. The first message is from "Ernie Erstein, Erstein AG" (7 minutes ago), stating he wants to upload a new catalog "Erstein Special Edition" and has attached a file "Erstein_2012_de.csv". Below this is a link to "Show all 3 comments". The second message is from "Ernie Erstein, Erstein AG" (4 minutes ago), reporting that an upload attempt failed. The third message is from "Portal Admin" (3 minutes ago), advising him to try again. A "Comment..." input field is at the bottom of the timeline. The right section, titled "Catalogs", lists two catalogs: "Erstein Special Edition" (updated 07/23/12 9:55 AM) and "Erstein_2012" (updated 07/23/12 10:27 AM). Each catalog has an "Upload data" button and links for "View catalog details" and "View catalog items". At the bottom of the catalogs section, a system message from "Ernie Erstein" (7/24/12 9:25 AM) reports a successful test run of "Erstein_en.csv" with 0 errors and 0 warnings, accompanied by a "View report" link. The top right of the dashboard shows the user's name "Sebastian Gärtner" and links for "Help" and "Log Out".

The "dashboard"

3 Timeline

The "Timeline" is located on the "[dashboard](#)"^[6] and is used as the central communication hub. This is where you will find messages and system messages about the [progress of test runs](#)^[18] and [import runs](#)^[19]. From here, you can communicate with the retailer's portal administrator by:

- [Replying to messages](#)^[8]
- [Sending messages to the portal administrator](#)^[9]



The "Timeline"

The "Timeline" displays messages, sorted by when they were received. Older messages are hidden and can be shown by clicking on **Show older messages** in the lower section of the Timeline.

You can also [filter](#)^[10] the messages by message type.

You can also [delete](#)^[11] messages after sending them.


The view is updated automatically. The system searches in the background for changes and displays these immediately.

In the case of system messages relating to the [progress of test runs, import releases](#)^[18], and [import runs](#)^[19], corresponding logs are also sent. You can view these by clicking on **Open result** in the relevant system message.

 **Tip:** You can also choose to receive [e-mail notification](#)²⁷ of the messages displayed in the "Timeline".

3.1 Replying to messages

This section describes how to reply to messages.


 **Note:** It is not possible to reply to messages that are sent to all suppliers.








Prerequisites


You have opened the "dashboard".

Procedure

Perform the following steps in order:

1. In the "Timeline", find the message you want to reply to.
2. Click in the input box below the message.
 A message editor opens.
3. Enter the required text for your reply. When entering the reply text, you can also use the following emoticons:

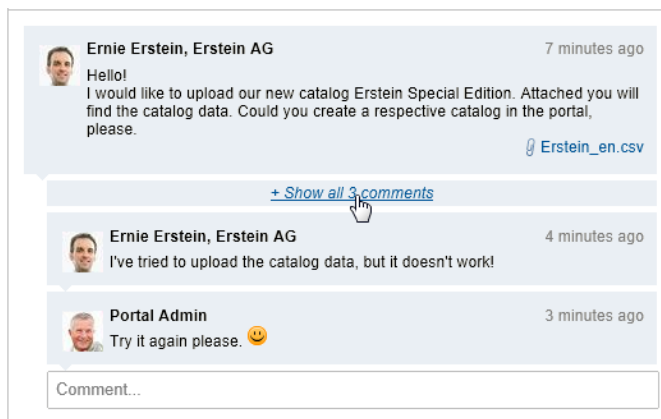
Emoticon	Character string to enter
	:) or :-)
	:(or :-(
	:P or :-P
	:D or :-D
	;) or ;-)
	:y:
	:n:

4. If you want to attach a file to your reply, click on **Attachment** and select the relevant file.
 A corresponding file attachment is generated. You can delete this by clicking on **Remove**.
5. Click on **Send**.



Result

The reply is sent to the portal administrator. The portal administrator can then reply to your message in turn.

You can still see the reply, which is appended to the original message. If this produces a long history of communication, the older replies are hidden. To view more replies, click on **Show all comments**. Click on **Hide comments** to restrict the display again.



Message with numerous replies

 **Tip:** Your personal avatar is shown next to your message. You can change this in your [personal settings](#)  ²⁷.

You can also [delete](#)  ¹¹ messages after sending them.

3.2 Sending messages

This section describes how to send messages.








Prerequisites

You have opened the "Dashboard".

Procedure

Perform the following steps in order:

1. Click in the top input box in the "Timeline".
⇒ A message editor opens.
2. Enter the required message text. When entering the message text, you can also use the following emoticons:

Emoticon	Character string to enter
	:) or :-)
	:(or :-(
	:P or :-P
	:D or :-D
	;) or ;-)
	:y:
	:n:



3. If you want to attach a file to your message, click on **Attachment** and select the relevant file.
⇒ A corresponding file attachment is generated. You can delete this by clicking on **Remove**.

4. Click on **Send**.

Result

The message is sent and can be viewed by the portal administrators and other users in your organization.

You can still see the message, which is added to the top of the "Timeline".

 **Tip:** Your personal avatar is shown next to your message. You can change this in your [personal settings](#) .

You can also [delete](#)  messages after sending them.

3.3 Filtering messages

The messages displayed in the "Timeline" can be filtered by the relevant message type. The following **message types** are distinguished:

Message type	Meaning
"All messages"	All messages
"User generated messages"	Messages sent by portal administrators or other users in your organization.
"Data upload messages"	Messages sent when uploading catalog data.

Prerequisites

You have opened the "Dashboard".

Procedure

Perform the following steps in order:

1. Click in the drop-down list in the upper section of the "Timeline".
2. Select the desired message types.
3. Click on **Apply**.

Result

The messages are filtered by the selected message types and displayed in the "Timeline". Under some circumstances, not all messages that meet the filter criterion may be visible, only the most recent. To view older messages, click on **Show older messages** in the lower section of the Timeline.

3.4 Deleting messages



You can also delete messages after sending them. This is described in this section.

Prerequisites

You have opened the "Dashboard".

Procedure


Perform the following steps in order:

1. In the "Timeline", find the message you want to delete.
2. Position the mouse pointer on this message.
 - ⇒ The  button is displayed next to the message on the top right-hand side.
3. Click on .
- ⇒ You are then prompted to confirm the action.
- 4.

Confirm with **Yes**.

- ⇒ The message is deleted.

4 Catalogs

The "Catalogs" area on the "[dashboard](#)"⁶ contains a list of your catalogs. If you click on , the most recent update operations for the relevant catalog are shown. From here, you can:

- [Upload catalog data directly to the portal](#)¹²
- [View the relevant catalog details](#)¹⁵
- [Display or edit the items in the relevant catalog, depending on the settings](#)¹⁶
- [View test run reports for the relevant catalog](#)¹⁸
- [View import reports for the relevant catalog](#)¹⁹

Catalogs	
Erstein Special Edition	07/23/12 9:55 AM
Upload data	View catalog details View catalog items
▼	
Erstein_2012	07/23/12 10:27 AM
Upload data	View catalog details View catalog items
▲	
7/24/12 9:25 AM Ernie Erstein View report Test run of Erstein_en.csv Erstein CSV Finished with 0 errors, 0 warnings	

The "Catalogs" area




Note: There is no need to explicitly save or update the dashboard view. These actions occur automatically.

4.1 Uploading catalog data

This section describes how to upload catalog data or media files for a catalog to the portal.

This operation is carried out in several stages:

1. First, you must select what is known as a **mapping**. The mapping defines the format in which the catalog data must exist (e.g. XML or CSV). The mapping is used to specify the assignment of the data fields for your catalog data to the data fields in the retailer's product management system.
2. You then upload the catalog data or images to the portal.
3. Before the data can be imported into the retailer's product management system, a **test run** is performed. This is used to identify any discrepancies in the data in advance. A [test run report](#)¹⁸ provides detailed information about the result, so that any errors can be corrected.
4. If the test run does not reveal any errors, the final step is to release the data for import into the product management system.

 **Tip:** The release for import can also be performed automatically by making the corresponding settings.

Prerequisites

The catalog to which you want to upload data must already exist in the portal or have been previously created by the portal administrator in the form of a blank catalog. The catalog data must be in a format for which an appropriate mapping (with the status "Active") exists.

Procedure

There are two ways to upload catalog data to the portal.

Using the ["dashboard"](#)⁶:


1. Find the relevant catalog under "Catalogs" and click on **Upload data**.
⇒ The dialog box for uploading catalog data opens in the action area.
2. Select the appropriate mapping and follow the instructions.

Using the [menu area](#)⁴:


1. Click on **Upload data to a catalog** in the menu area.
⇒ A dialog box for uploading catalog data opens in the action area.
2. First select the relevant catalog and then follow the instructions displayed in the action area.

Result

Once you have successfully completed all of the actions, the import is either performed automatically or the portal administrator is notified that the catalog data is ready for import, depending on the settings. In the latter case, the administrator must approve the import before initiating it manually. As soon as the import is complete, you are notified. An [import report](#)¹⁹ provides detailed information about the progress of the import.


 **Caution:** Until the import has been completed, you cannot upload any further catalog data for the same catalog.

4.2 Uploading catalog data using PIM Media Manager

 **Caution:** To use this method of compiling files for a catalog import, good knowledge of the WORKFLOW module of Product 360 Media Manager is necessary.

This section describes how to upload catalog or media data for a catalog to the portal, once it has been validated using an Product 360 Media Manager workflow and compiled accordingly.

This operation is carried out in several stages:

1. First, you must select what is known as a **mapping**. The mapping defines the format in which the catalog data must exist (e.g. XML or CSV). The mapping is used to specify the assignment of the data fields for your catalog data to the data fields in the retailer's product management system.
2. You then upload the catalog data or images to the portal.
3. Before the data can be imported into the retailer's product management system, a **test run** is performed. This is used to identify any discrepancies in the data in advance. A [test run report](#)  provides detailed information about the result, so that any errors can be corrected.
4. If the test run does not reveal any errors, the final step is to release the data for import into the product management system.



Tip: The release for import can also be performed automatically by making the corresponding settings.

Prerequisites

The catalog to which you want to upload data must already exist in the portal or have been previously created by the portal administrator in the form of a blank catalog. The catalog data must be in a format for which an appropriate mapping (with the status "Active") exists.

The Product 360 Media Manager workflow has correctly processed all instructions (checking for new assets for particular catalog, resolution, size and file format, and then saving in zipped form to a specific new directory created).

Procedure

There are two ways to upload catalog data to the portal.

Using the "[dashboard](#)" :

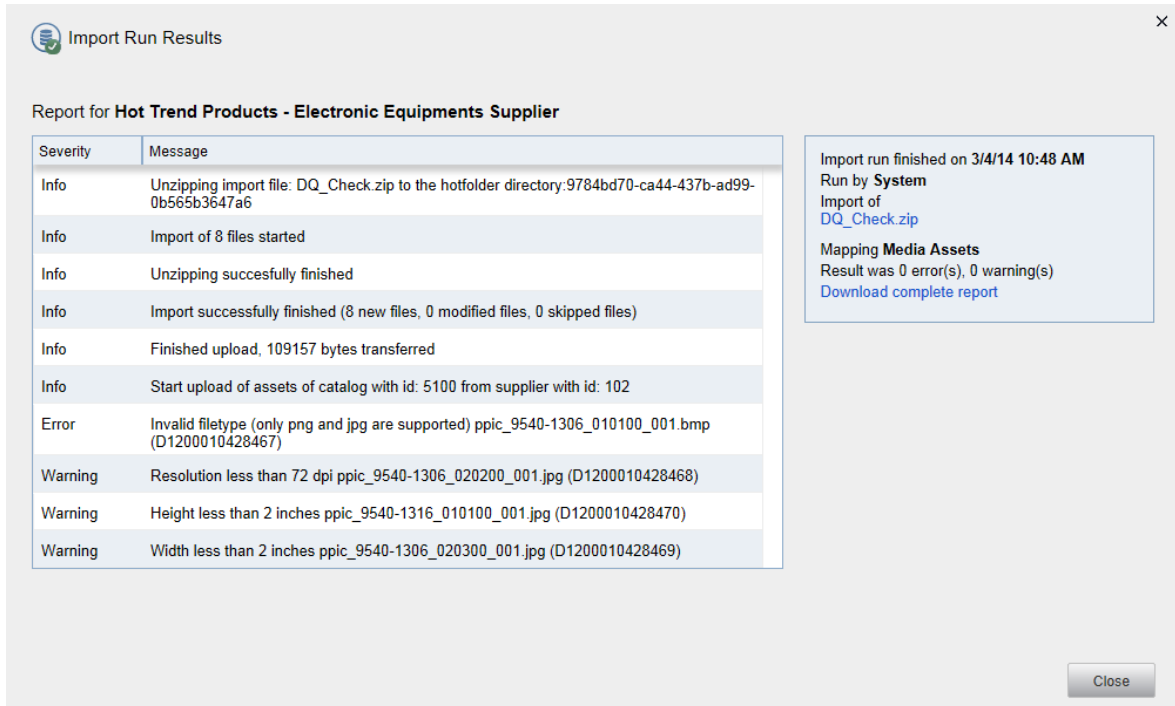
1. Find the relevant catalog under "Catalogs" and click on **Upload data**.
⇒ The dialog box for uploading catalog data opens in the action area.
2. Select the appropriate mapping and follow the instructions.

Using the [menu area](#) :

1. Click on **Upload data to a catalog** in the menu area.
⇒ A dialog box for uploading catalog data opens in the action area.
2. First select the relevant catalog and then follow the instructions displayed in the action area.

Result

Once you have successfully completed all of the actions, the import is either performed automatically or the portal administrator is notified that the catalog data is ready for import, depending on the settings. In the latter case, the administrator must approve the import before initiating it manually. As soon as the import is complete, you are notified. An [import report](#)¹⁹ provides detailed information about the progress of the import.



Import Run Results


Report for **Hot Trend Products - Electronic Equipments Supplier**

Severity	Message
Info	Unzipping import file: DQ_Check.zip to the hotfolder directory:9784bd70-ca44-437b-ad99-0b565b3647a6
Info	Import of 8 files started
Info	Unzipping successfully finished
Info	Import successfully finished (8 new files, 0 modified files, 0 skipped files)
Info	Finished upload, 109157 bytes transferred
Info	Start upload of assets of catalog with id: 5100 from supplier with id: 102
Error	Invalid filetype (only png and jpg are supported) ppic_9540-1306_010100_001.bmp (D1200010428467)
Warning	Resolution less than 72 dpi ppic_9540-1306_020200_001.jpg (D1200010428468)
Warning	Height less than 2 inches ppic_9540-1316_010100_001.jpg (D1200010428470)
Warning	Width less than 2 inches ppic_9540-1306_020300_001.jpg (D1200010428469)

Import run finished on 3/4/14 10:48 AM
Run by **System**
Import of
DQ_Check.zip
Mapping Media Assets
Result was 0 error(s), 0 warning(s)
[Download complete report](#)

Close

Import report with possible messages

 **Caution:** Until the import has been completed, you cannot upload any further catalog data for the same catalog.

4.3 Viewing catalog details

This section describes how to view catalog details.

Prerequisites

You have opened the "[dashboard](#)"⁶.

Procedure

Perform the following steps in order:

1. In the "Catalogs" area, find the catalog whose details you want to view.
2. Click on **View catalog details**.

Result

Clicking on **View catalog details** displays the selected catalog in the Product 360 Web, where they can be edited. Information on editing items can be found in the user manual for Product 360 Web.


4.4 Viewing the item list



Note: Depending on the configuration of Product 360 - Supplier Portal this functionality may not be available.

This section describes how to view the items in a catalog.

Prerequisites

You have opened the "[Dashboard](#) ".

Procedure

Perform the following steps in order:

1. Find the catalog for which you want to view the item list in the "Catalogs" area.
2. Click on **View catalog items**.

Result

The items in the catalog are displayed in the "Item List". In addition to the supplier item number, this lists the short description and the long description of the item. The data is initially displayed in the login language. You can also display it in other languages, if available, by selecting the relevant language from the drop-down list in the top right.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

You can refresh the display at any time by clicking on **Refresh** in the top right corner.

You can use the **Next** and **Back** buttons to scroll through the list.

4.5 Editing items



Note: Depending on how your Product 360 - Supplier Portal is configured, these functions may not be available.

You can edit the items in a catalog directly using an editor, depending on the settings. This is described in this section.

Prerequisites

You have opened the "[dashboard](#)". The portal administrator has configured the process for editing items accordingly.

Procedure

Perform the following steps in order:

1. In the "Catalogs" area, find the catalog whose items you want to edit.
2. Click on **Edit catalog items**.

Result

Clicking on **Edit catalog items** displays the items in the Product 360 Web, where they can be edited. Information on editing items can be found in the user manual for Product 360 Web.

4.5.1 Uploading Media Documents to a Catalog

Use multimedia documents to enhance the description of items. Use the dashboard area to upload multimedia documents to the items that you can access.



Note: You can use multimedia documents with the same file name for items that belong to different categories.

1. Click **Open my dashboard**.

The **Dashboard** area opens.

2. In the **Catalogs** area, under the required catalog, click the **Edit catalog items** link.

All the items that belong to the selected catalog appear in the **Item List**.

3. Select the item to which you want to upload the multimedia document.

The item details appear in the **Detail** view.

4. On the **Media** tab, click **Add Media Attachment** .

The **Add media attachment** dialog box appears.

5. Specify the type of the multimedia document that you plan to upload.
6. Specify the priority that indicates the number of multimedia documents you can upload.
7. Specify the language of the multimedia document.
8. To select the multimedia document, perform one of the following tasks:
 - If you know the document identifier number of an available multimedia document, specify the document identifier number, and click **OK**.
 - Click the **here** link.

On the Product 360 Web page, perform one of the following tasks:

- To attach an available multimedia document, select the required document from the **Item List**, click **Ok and close the browser**, and click **OK**.
- To upload a new multimedia document, perform the following tasks:

i. Click **Upload document** .

The **Upload document** dialog box appears.

ii. Browse to the multimedia document to upload and click **Start upload**.

iii. Click **Close**.

The uploaded multimedia document appears in the **Item List**.

iv. Select the multimedia document you uploaded, and click **Ok and close browser window**.

v. Click **OK**.

4.6 Viewing test run reports

While [uploading catalog data](#)¹² a **test run** is performed. A **test run report** is created. This provides detailed information about the progress of the test run. This section describes how to view these test run reports.

Prerequisites

A test run must have been performed.

Procedure

There are several ways to open and view test run reports. While uploading catalog data, the test run report is displayed in the action area immediately after the test run. You can open the test run report later using the "[Dashboard](#)"⁶:

1. On the "Dashboard", find the catalog for which you want to view the test run report in the "Catalogs" area.
2. Click on **View catalog details**.
 - ⇒ The "Catalog Details" are displayed.
3. Find the entry for the relevant test run in the "Update History" area.
4. Click on **View report**.

Result

The test run report is displayed. It provides information about who initiated the test run and when, what catalog data file is to be/has been imported, how many new items are to be created in the PIM organization's product management system and how many items are/were to be updated. In addition, it shows how many errors and warnings occurred during the test run.

If errors or warnings have occurred, you will find a list of these under "Details". Clicking on the relevant link in the "Message" column displays more detailed information about the relevant error or warning.

Clicking on **Open complete report** displays a detailed report about the progress of the test run, with details of all test run steps, errors and warnings. You can also download the report by clicking on **Download complete report**.

4.7 Viewing import reports

After completion of an import, an **import report** is produced. This provides detailed information about the progress of the import. This section describes how to view the import report for an import.

Prerequisites

The import for which you want to view the import report must be complete.

Procedure

There are several ways to open and view import reports. As soon as the import is complete, you will find a corresponding system message in the "[Timeline](#)"⁷:

1. Find the system message about completion of the import in the "Timeline".
2. Click on **Open result**.

You can also retrieve the import report from the "Catalogs" area:

1. On the "Dashboard", find the catalog for which you want to view the import report in the "Catalogs" area.
2. Click on **View catalog details**.
 - ⇒ The "Catalog Details" are displayed.
3. Find the entry for the relevant test run in the "Update History" area.
4. Click on **View report**.


Result

The import report is displayed. It provides information about who initiated the import and when, which catalog data file has been imported, how many new items have been created in the PIM organization's product management system and how many items have been updated. In addition, it shows how many errors and warnings occurred.

If errors or warnings have occurred, you will find a list of these under "Details". Clicking on the relevant link in the "Message" column displays more detailed information about the relevant error or warning.

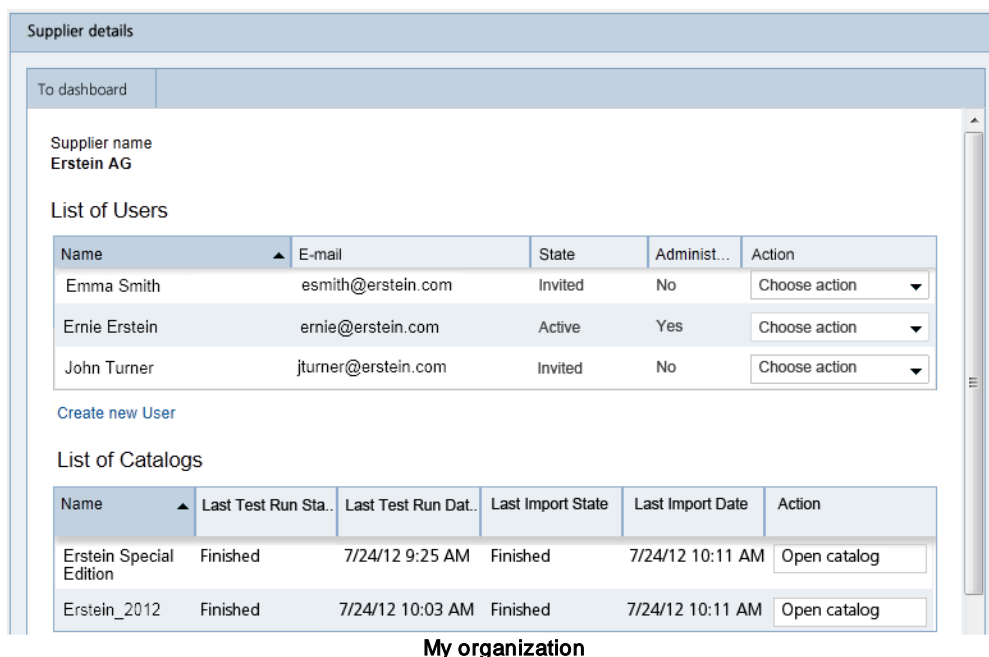
Clicking on **Open complete report** displays a detailed report on the progress of the import with details of all import steps, errors, and warnings. You can also download the report by clicking on **Download complete report**.

5 Organization management

 **Note:** This area is only available if you are an administrator for your organization.

As an administrator in your organization, you can invite other users from your organization to use the portal. These users can then log in to the portal, upload catalog data, read messages and system messages, and send messages.

You can get a quick overview of all registered users and catalogs in your organization by clicking on **View my organization** in the menu area. The details for your organization are then displayed.



Supplier details

To dashboard

Supplier name
Erstein AG

List of Users

Name	E-mail	State	Administ...	Action
Emma Smith	esmith@erstein.com	Invited	No	Choose action
Ernie Erstein	ernie@erstein.com	Active	Yes	Choose action
John Turner	jturner@erstein.com	Invited	No	Choose action

[Create new User](#)

List of Catalogs

Name	Last Test Run Sta..	Last Test Run Dat..	Last Import State	Last Import Date	Action
Erstein Special Edition	Finished	7/24/12 9:25 AM	Finished	7/24/12 10:11 AM	Open catalog
Erstein_2012	Finished	7/24/12 10:03 AM	Finished	7/24/12 10:11 AM	Open catalog

My organization

Under "Users", you will find a list of all users from your organization registered in the portal, along with their status and role in the portal. The **Status** of the user can have the following values:

Status	Meaning
"Active"	The user has active access to the portal and can perform actions there according to their rights.
"Invited"	The user has been created and invited by e-mail to connect to the portal and set his password. The user's portal access is not yet "Active", i.e. the user has not yet set his password.
"Deactivated"	The user's portal access has been deactivated ^[24] by the administrator. The user cannot log in to the portal.

You can sort the list alphabetically by the criteria shown in the columns. To do this, click on the title of the relevant column. The list is then sorted in ascending order of the entries in this column. Clicking on the column title again sorts the list in descending order.

Under "Catalogs", you will find all catalogs from your organization that are available in the portal.

From here, you can:

- [View and edit the details for a user](#) ²²
- [Create additional users and invite them to log in to the portal](#) ²³
- [Recall invitations and thus delete users](#) ²³
- [Resend invitations](#) ²⁴
- [Deactivate users](#) ²⁴
- [Activate users](#) ²⁵
- [Reset a user's password](#) ²⁵
- View the [details for a catalog](#) ¹⁵ by finding the relevant catalog under "Catalogs" and then selecting the "Open catalog" option in the "Action" column.

5.1 Viewing and editing user details

This section describes how to open and edit user details.

The "Supplier User Details" can be used to manage user data such as the name and e-mail address. This is also where you can view the status of the user. You can also specify which type of notifications are to be sent to the user by e-mail.

Prerequisites

You are an administrator in your organization and have opened "[organization management](#)" ²¹.

Procedure

Perform the following steps in order:

1. Under "Users", find the user whose details you want to view.
2. In the "Action" column, select the "Open supplier user" option.
 - ⇒ The "Supplier User Details" are displayed.
3. If necessary, edit the data in the input boxes.
4. Messages and system messages are displayed in the "Timeline" by default. In addition, these can be sent to the user by e-mail. Make this setting under "E-mail notification settings". A distinction is made between the following message types:

Message type	Meaning
"User generated messages"	Messages sent by portal administrators or other users in your organization.
"Test run complete"	Messages sent after completion of test runs.

Message type	Meaning
"Data released for import"	Messages sent when catalog data has been released for import.
"Import complete"	Messages sent after completion of imports.

5.

All editing changes are automatically saved when you exit this view.

5.2 Creating users

This section describes how to create additional users in your organization.

Prerequisites

You are an administrator in your organization and have opened "[organization management](#)"^[21].

Procedure

Perform the following steps in order:

1. Click on **Create new user**.
⇒ The "Create new user" dialog box opens.
2. Enter the first name, second name, and e-mail address of the new user.
3. Select the display language for the user using the drop-down list.
- 4.

All editing changes are automatically saved when you exit this view.

Result

The user is created with the specified data. The user is assigned the status "Invited" and invited by e-mail to connect to the portal and set a password.

⇒ **Note:** If you subsequently notice that you have created an access for the incorrect person or have entered the wrong e-mail address, you can [recall the invitation you have sent and thus delete the user](#)^[23].

5.3 Recalling an invitation/deleting a user

If you want to delete a user you have just created, for example because you have discovered that you have [created access](#)^[23] for the incorrect person or entered the wrong e-mail address, you can do this by recalling the invitation you have previously sent. This is described in this section.

Prerequisites

The relevant user must still have the status "Invited".

You are an administrator in your organization and have opened "[organization management](#)"²¹.

Procedure

Perform the following steps in order:

1. Find the user you want to delete or whose invitation you want to recall under "Users".
2. In the "Action" column, select the "Revoke invitation" option.
⇒ You are then prompted to confirm the action.
- 3.

Confirm with **Yes**.

Result

The invitation is recalled and the user is deleted.

5.4 Resending an invitation

If you have [created a user](#)²³ and thus invited them to log in to the portal, and they have not yet logged in to the portal after a long period, you can send another invitation to the user. This is described in this section.

Prerequisites

The relevant user must still have the status "Invited".

You are an administrator in your organization and have opened "[organization management](#)"²¹.

Procedure

Perform the following steps in order:

1. Find the user for which you want to resend the invitation under "Users".
2. In the "Action" column, select the "Resend invitation" option.
⇒ You are then prompted to confirm the action.
- 3.

Confirm with **Yes**.

Result

The invitation is resent to the supplier user.

5.5 Deactivating users

This section describes how to deactivate users.

Prerequisites

Only users with the status "Active" can be deactivated.

You are an administrator in your organization and have opened "[organization management](#)"²¹.

Procedure

Perform the following steps in order:

1. Under "Users", find the user you want to deactivate.
2. In the "Action" column, select the "Deactivate user" option.
⇒ You are then prompted to confirm the action.
- 3.

Confirm with **Yes**.

Result

The user is deactivated. This means that the user can no longer log in to the portal. The user's status changes to "Deactivated".

5.6 Activating users

This section describes how to reactivate users that have been deactivated.

Prerequisites

You can only activate users that have previously been deactivated, i.e. with the status "Deactivated".

You are an administrator in your organization and have opened "[organization management](#)"²¹.

Procedure

Perform the following steps in order:

1. Under "Users", find the user you want to reactivate.
2. In the "Action" column, select the "Reactivate user" option.
⇒ You are then prompted to confirm the action.
- 3.

Confirm with **Yes**.

Result


The user is reactivated. This means that the user can log in to the portal again. The user's status changes to "Active".

5.7 Resetting a user's password

This section describes how to reset a user's password.

Prerequisites

The password can only be reset for users with the status "Active".

You are an administrator in your organization and have opened "[organization management](#)" .

Procedure

Perform the following steps in order:

1. Find the user you want to reactivate under "Users".
2. In the "Action" column, select the "Reset password" option.
⇒ You are then prompted to confirm the action.
3.
Confirm with **Yes**.


Result

The user has been prompted by e-mail to connect to the portal and reset his password.

5.8 Removing users

This section describes how to remove a user, such as a supplier user, a broke user, or a supplier administrator. When you remove a user, the data and timeline messages of the user are permanently deleted.

Prerequisites

You are an administrator in your organization and have opened "[organization management](#)" .

You can remove a supplier user or a broke user. You can remove a supplier administrator only when you remove the supplier organization. To remove a supplier administrator, you must first switch the supplier administrator role to another user role.

Procedure

Perform the following steps in order:

1. Under "Users", find the user that you want to remove.
2. In the "Action" column, select the "Remove user" option.
⇒ You are then prompted to confirm the action.
3.
Confirm with **Yes**.

Result

You have removed the user.

6 Editing personal settings

Messages and system messages are displayed in the "Timeline" by default. In addition, you can make specific settings so that these messages are also sent to you by e-mail. This section describes how to make these settings and how you can change your personal data and your personal avatar. Your avatar is shown in the "Timeline" next to your messages and replies.

Procedure

Perform the following steps in order:

1. Click on **Edit my personal settings** in the menu area.
⇒ Your personal settings are displayed in the "Supplier User Details" dialog box.
2. Edit the data in the input boxes to make the relevant changes.
3. Under "E-mail notification settings", specify the type of notifications you want to receive by e-mail. A distinction is made between the following message types:

Message type	Meaning
"User generated messages"	Messages sent by portal administrators or other users in your organization.
"Test run complete"	Messages sent after completion of test runs.
"Data released for import"	Messages sent when catalog data has been released for import.
"Import complete"	Messages sent after completion of imports.

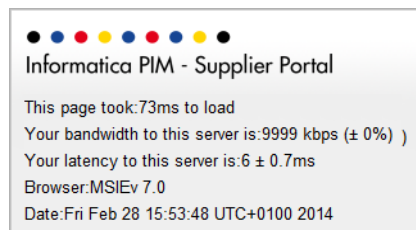
4. Click on **Change** to integrate an image or graphic as an avatar or to change the avatar, and select the file containing the relevant image. To remove an avatar that has already been embedded, click on **Remove**.
- 5.

All editing changes are automatically saved when you exit this view.

7 Performance statistics

To ensure optimum operation of Product 360 - Supplier Portal information of a technical nature is necessary. You can view a summary of the most important performance data by selecting **Help >**

Performance Statistics.



Performance statistics

A separate window containing the following information is opened:

- The time (in milliseconds) required to load the relevant page. This specifies the difference, which arises as a delay between two operations (sending and receiving data).
- The bandwidth is a measure of the capacity or transfer rate in digital data transmission. It is specified in the unit bits per second and represents the available **data volume per unit of time** ratio for digital data transmission.
- The latency is the time (in milliseconds) between an action (or an event) and the occurrence of a delayed reaction. If there is a latency time, the action is hidden and is only clear when the reaction occurs. Colloquially, reactions with a very short latency are said to occur in real time.
- Information about the browser used and the current date rounds off the statistics.

8 Switch supplier context (Broker)

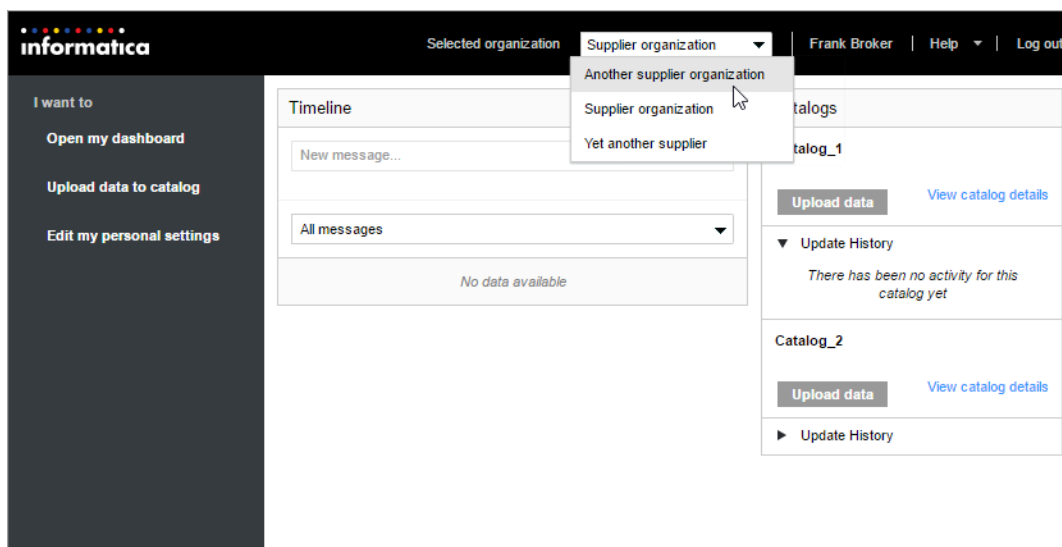
As a broker you have the possibility to maintain catalogs of different suppliers.

Procedure

Perform the following steps in order:

1. Sign in as a broker.
2. Find the supplier you want under "Selected organization".

⇒ You switched the organization.



Broker select organization

Index

- A -

Action area 4
Avatar 8, 9, 27

- B -

Bandwidth 28

- C -

Catalog
 Compile using Product 360 Media Manager workflow 13
 Edit items 16
 Upload 12, 13
 View details 15
 Viewing items 16
Catalog details 15
Catalogs 12

- D -

Dashboard 6

- H -

Header area 4

- I -

Import 19
Import reports 19
 Download 19
 View 19
Invitation
 Recall 23
 Resend 24
Item list 16

- L -

Latency 28

- M -

Mapping 12, 13
Menu area 4
Message type 10
Messages
 Filter 10
 Reply 8
 Send 9

Messages by e-mail 27

- O -

Operation 4
Organization management 21

- P -

Password
 Reset 25
Performance 28
Personal settings
 Edit 27

- S -

Status
 of user 21

- T -

Test run 12, 13, 18
Test run reports 18
 Download 18
 View 18
Timeline 7

- U -

User
 Activate 25
 Create 23
 Deactivate 24
 Delete 23
 Recalling invitation 23
 Resending invitations 24
 Reset password 25
 View and edit details 22
User details 22