

# PIM TRAINING DOCUMENT

**USER: VENDOR**

Article Management



*Latest Version: R3 Upgrade September 2020*



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## PREFACE

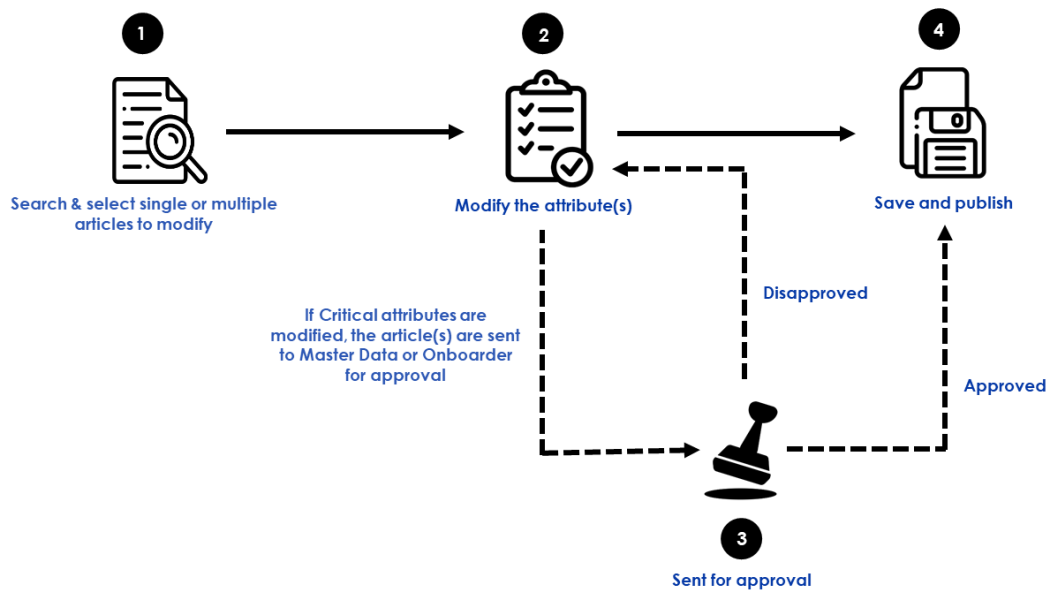
### Purpose

This document outlines how to manage articles using both the UI and Excel Template after they have been created.






**NOTE:** It's recommended to use the Excel Template when working with multiple articles.

### Before You Begin

Here's a step by step flow of the Article Management process:



Before you begin, please take note of the following:

- The  icon indicates that an action is required. The  icon is used to draw your attention to specific areas, however no action is required.
- If no action step is required and the information displayed is for your information only, a grey box will surround the text.
- For additional guidance in the UI, click on the information icon  .  
**TIP:** You will need to double click on the  for drop-down fields.
- Along the way, we will be providing tips such as the one above. To help you navigate these, we will *italicize* the text and begin the tip with the following icon  .

**\*NOTE: All article information in this manual is fictional and is used for training purposes only\***

## Login to PIM

1. Go to <https://indigobm.riversand.com/>
2. Enter your **Username** and **Password**
3. Press **'Enter'** or click on **'Log In'**

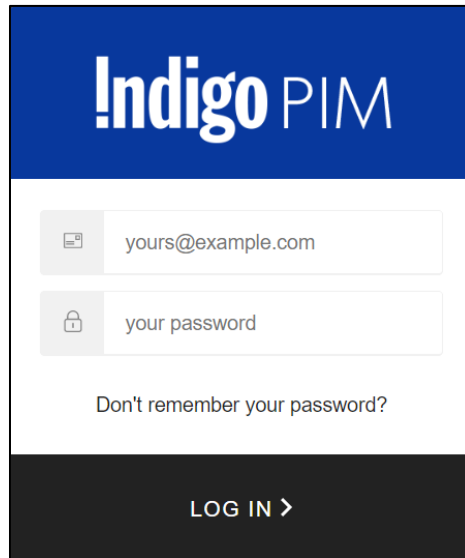


Fig. 1 Login Screen

After successful login you will be taken to the **Home** page

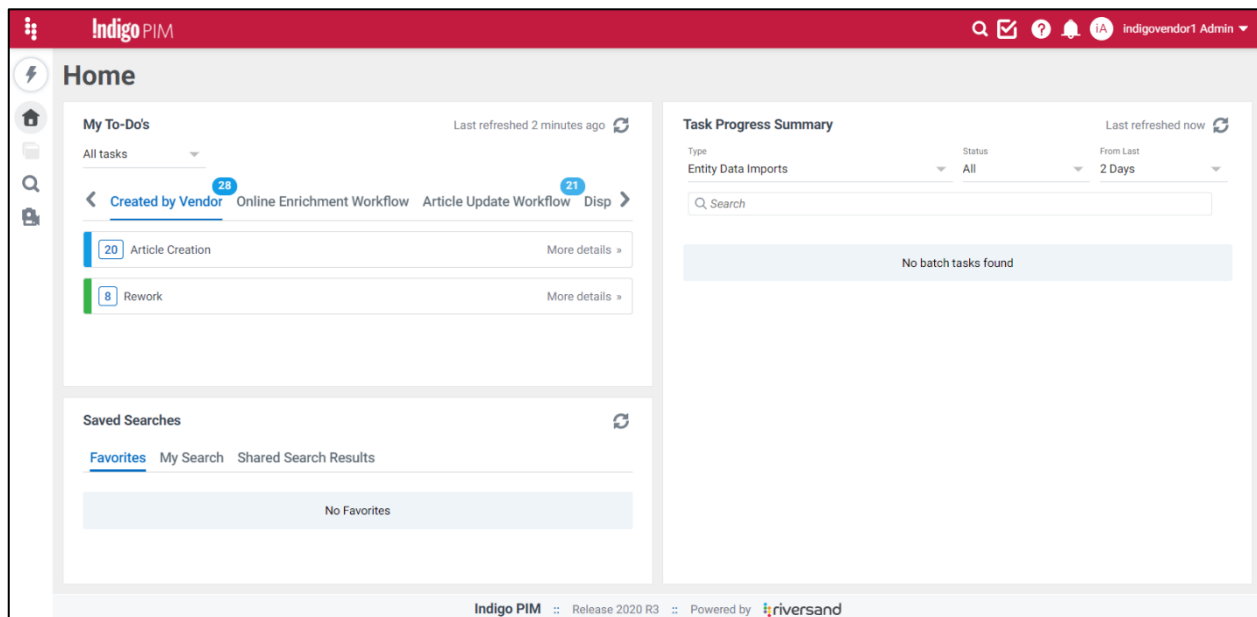






Fig. 2 Home

# ARTICLE MANAGEMENT USER INTERFACE

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## Modify a Single Article

1. Click on  then  Search Thing Domain or search for an article by clicking  and typing the UPC, Article Name, etc. in the search bar that appears  and pressing Enter. This will take you to the **Search Page**.

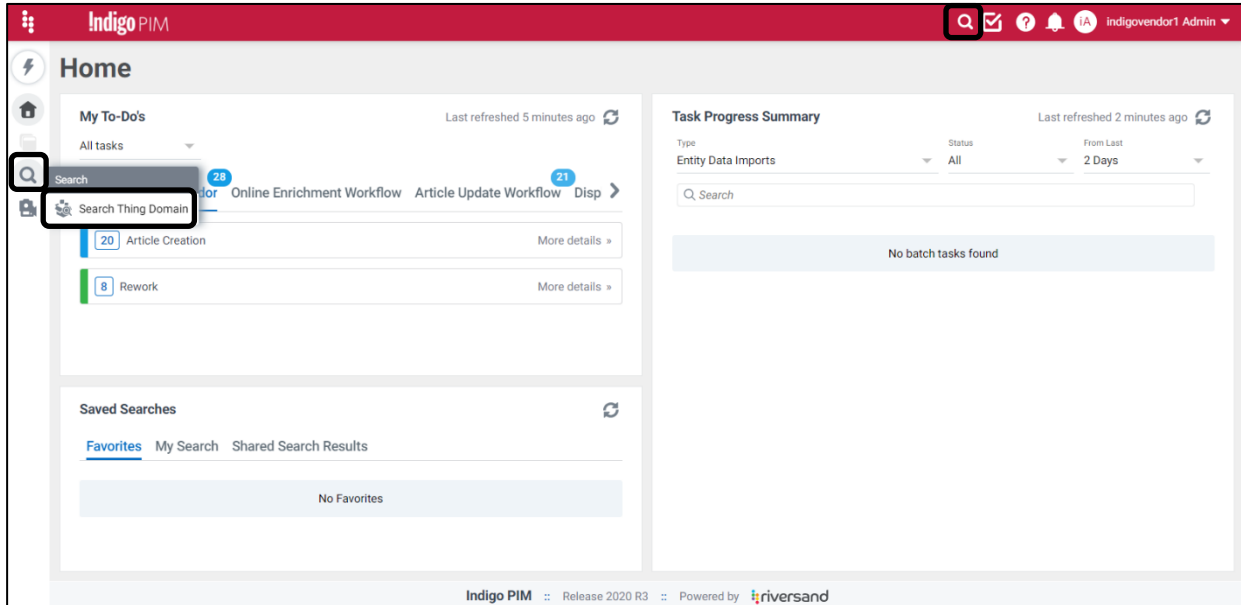


Fig. 3 Search

2. Click on the UPC or double click on any other field of the article to be modified. This will take you to the **Manage Article Page**.

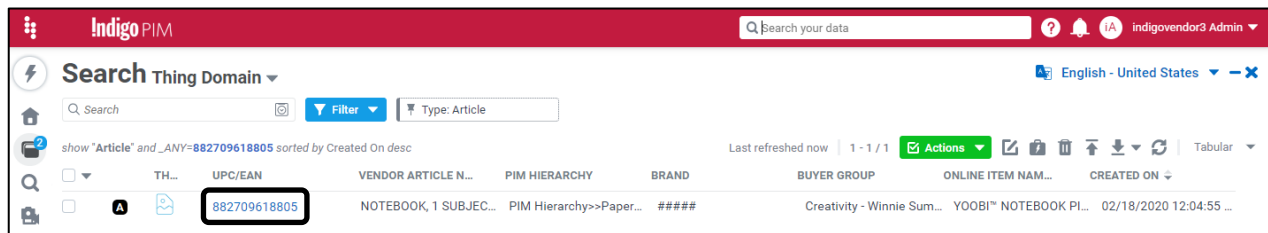


Fig. 4 Article Search

**NOTE:** The article can be at any stage of the workflow while you make changes. The 'Workflow' section on the right side of the Home page shows what stage the article is at in its lifecycle. This training document focuses on how to manage articles that have already been fully created (i.e. a PO has been cut).

- Find the attribute you'd like to update by clicking on the appropriate tab. In the example below, we are modifying **Online Product Description French - CA** so click on the **'Online'** tab.

**NOTE:** Refer to the Data Dictionary for guidance on locating and updating the attribute you're modifying

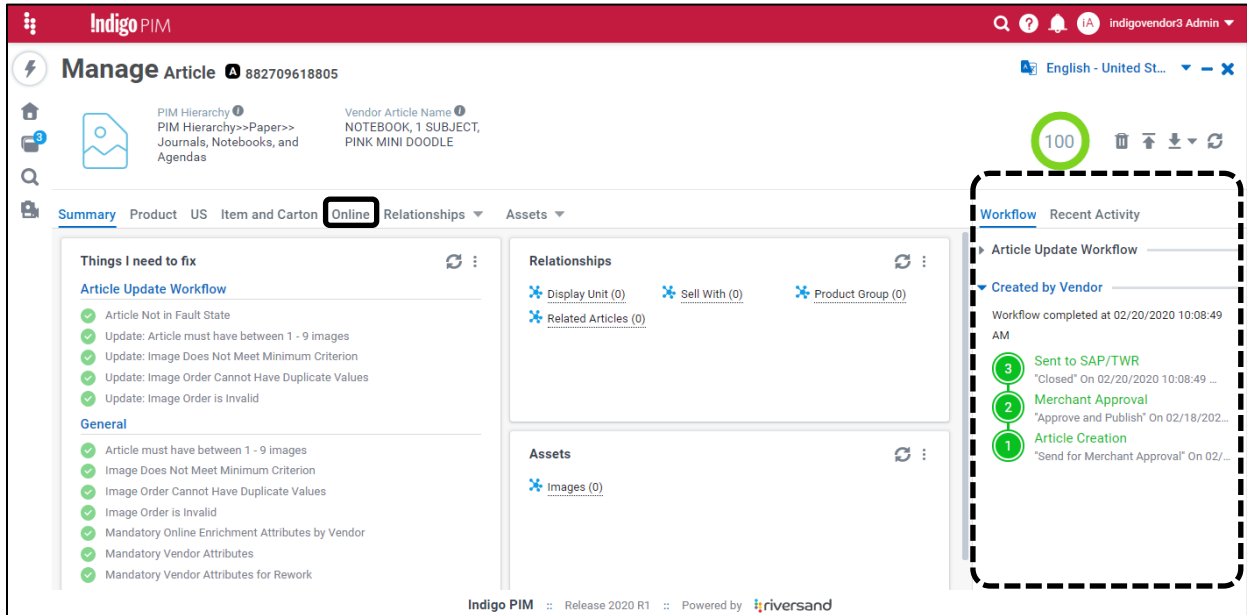


Fig. 5 Manage Article Page

- Click on  (edit) in the top righthand corner or next to the attribute you want to update

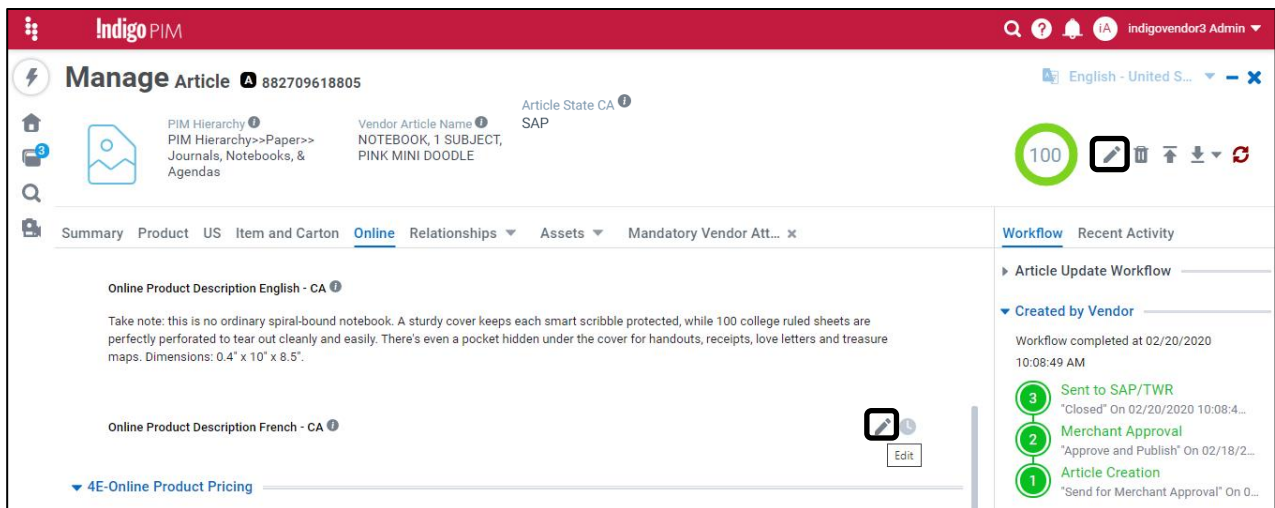


Fig. 6-1 Edit

5. Enter the updated value

6. Click on 

The following message will appear: 

7. Click  (refresh)

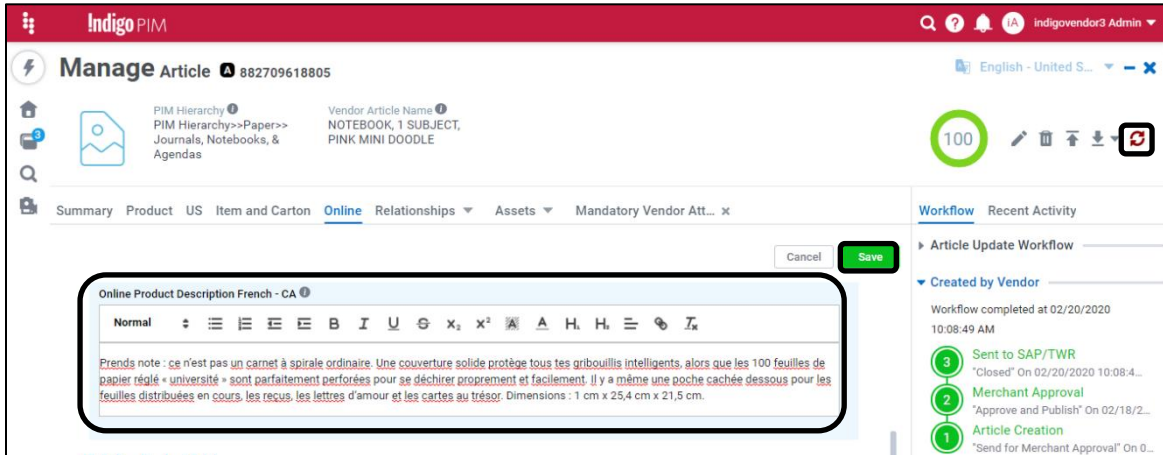



Fig. 6-2 Edit

8. Click on the **Summary** tab to make sure the **Article Update Workflow** business conditions have a ,

9. Under **Workflow**, click on 

The following message will appear: **Workflow action completed successfully**

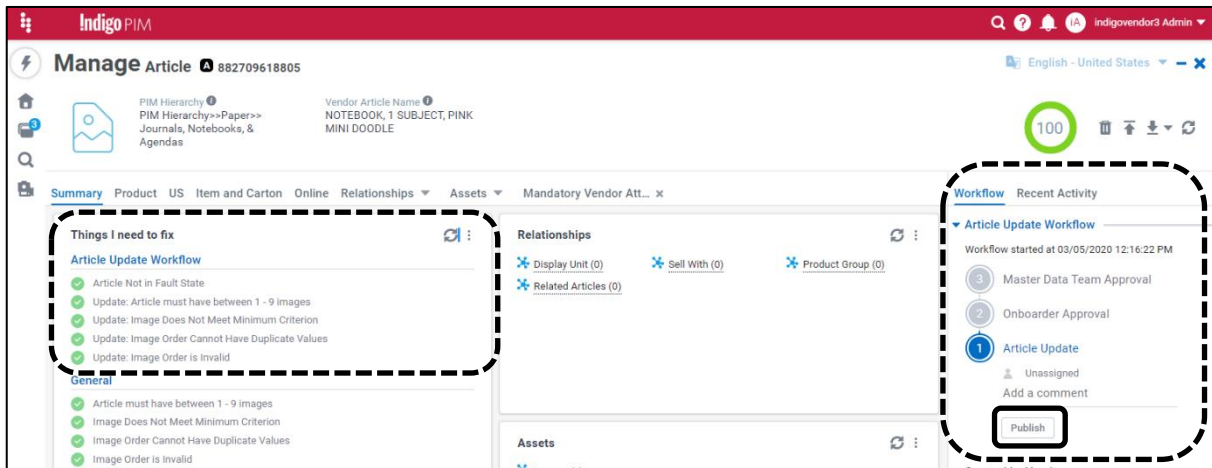


Fig. 7 Create and Publish

**NOTE:** If you are updating **critical attributes** the article will be sent to the Master Data or Onboarding teams for approval. For these, when you click on 'Publish' the 'Workflow' will show that the article is now waiting for **Master Data Team Approval** or **Onboarder Approval**. Refer to the Data Dictionary and Entry Guide for the list of critical attributes.

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**YOU HAVE SUCCESSFULLY MODIFIED A SINGLE ARTICLE USING THE USER INTERFACE**

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# Modify Multiple Articles

There are 2 cases where you can modify multiple articles:

- 1 The attribute(s) you are modifying can be changed to the same value. E.g. changing the **Brand** for several articles.
- 2 The attribute(s) you are modifying for several articles are being changed to different values. E.g. Modifying the **Dimensions**.

## 1 Same Value Modification

- 1. Click on  then  Search Thing Domain . This will take you to the **Search Page**.

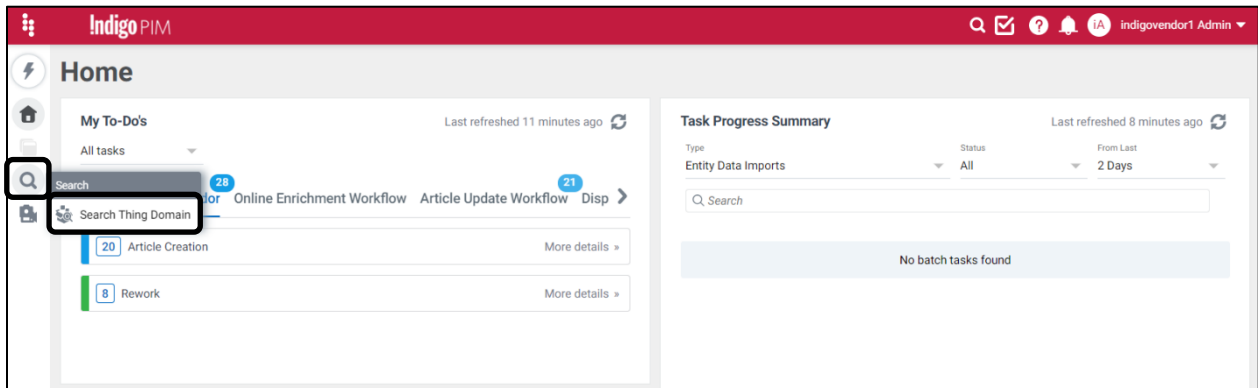


Fig. 8-1 Search

- 2. Search for the UPCs you want to edit by clicking on **Filter**, typing in **UPC**, selecting **UPC/EAN**, and then pasting in the UPC numbers and clicking on **Apply**.

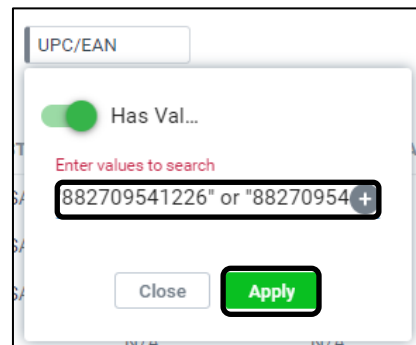



Fig. 8-2 Search

**NOTE:** Pasting in multiple UPCs from an Excel file will automatically create the correct formatting to search

3.  Select the articles you want to edit

 **TIP:** If you're editing less than 100 articles, you can select  the top box . This will select all, if there are less that 100.

 **TIP:** If you're editing more than 100 articles, you can click on the arrow , **Select All**, then **Apply**

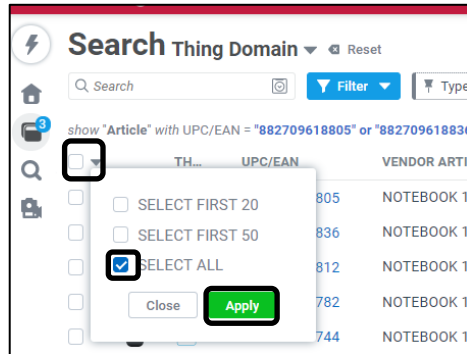


Fig. 9 Select All

4. Click on  (Bulk Edit)

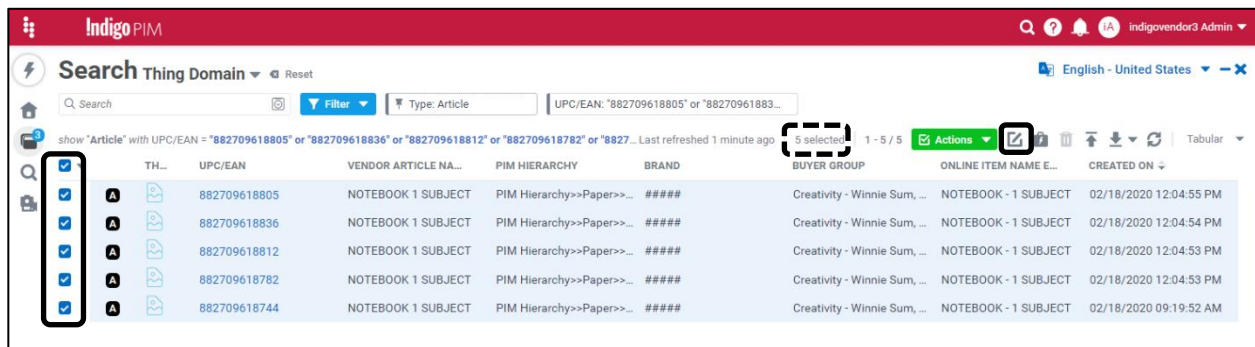


Fig. 10-1 Bulk Edit

5. In the **Name column**, type in the attribute(s) needed to make the modification(s)

6. Click  and  for each attribute you're looking to modify

**In this example, let's modify Brand.**

- Once all the attributes you want to bulk edit are in the **'Selected'** section of the screen, click on Next

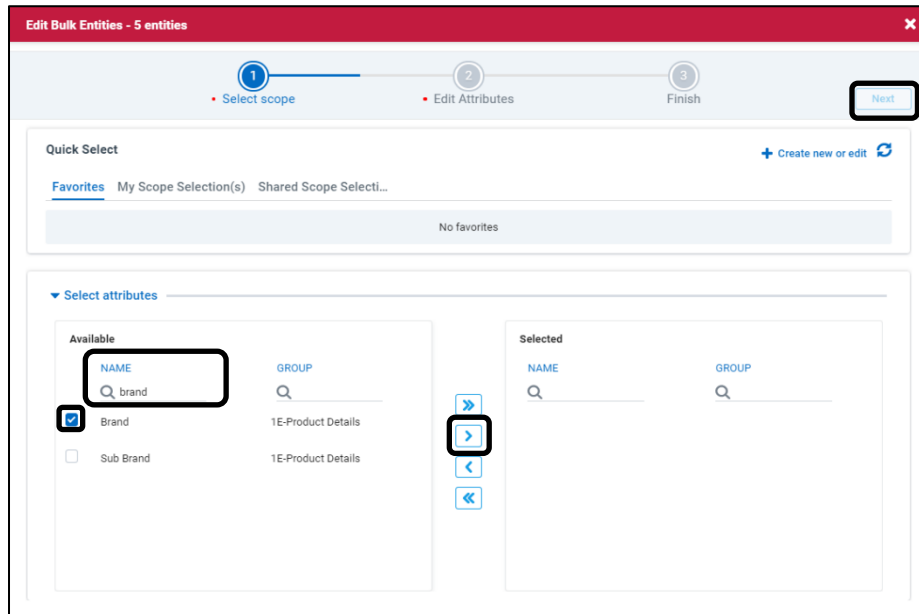


Fig. 10-2 Bulk Edit

- Change the attribute to the value that you want all the articles that you selected to have
- Click on Save

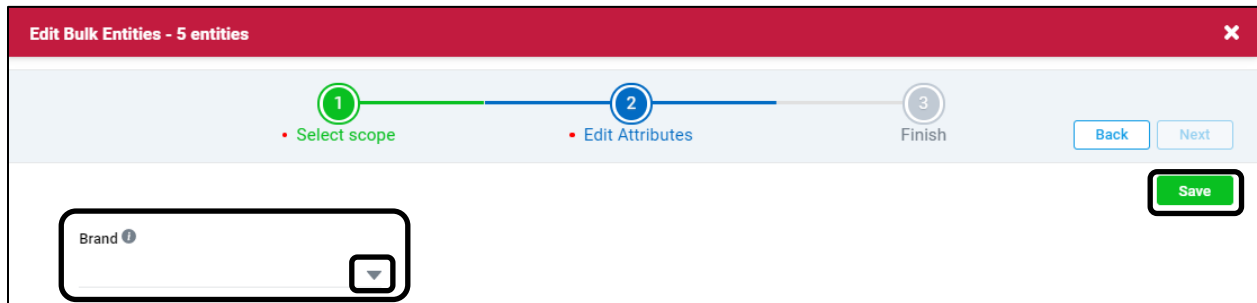


Fig. 10-3 Bulk Edit

- Click on **Show task details**

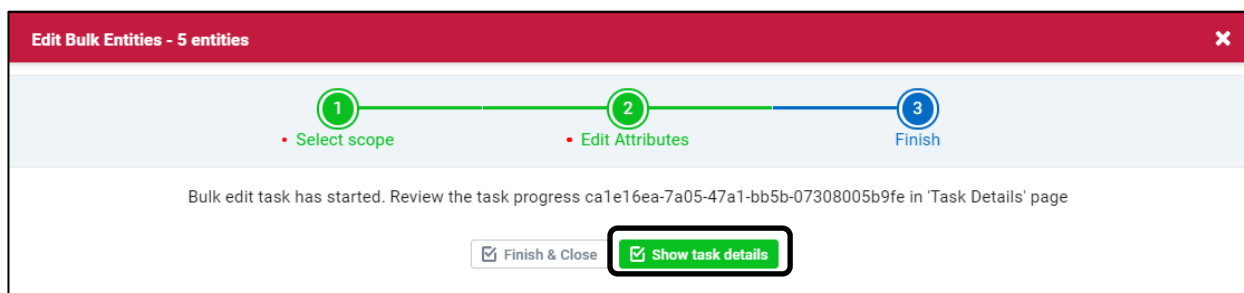



Fig 10-4 Bulk Edit

11. Click Refresh  until the Processing Details is 100% Success (green) and the Sub-details is 100% Update (orange)

**NOTE:** If Processing Details fully or partially appears red, indicating an error, click on the word 'Error' to investigate and make necessary changes

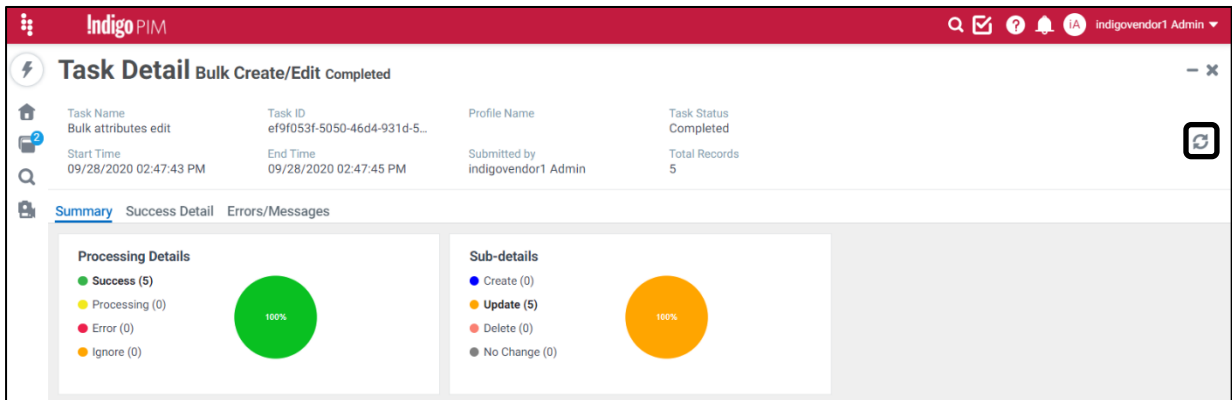


Fig. 10-5 Bulk Edit

12. To publish your changes, click on  to get back to **Home**

13. Click on  (refresh)

14. Click on the **Article Update Workflow** tab

15. Click on **More Details** under 'Article Update', then click on **Ready for transition**

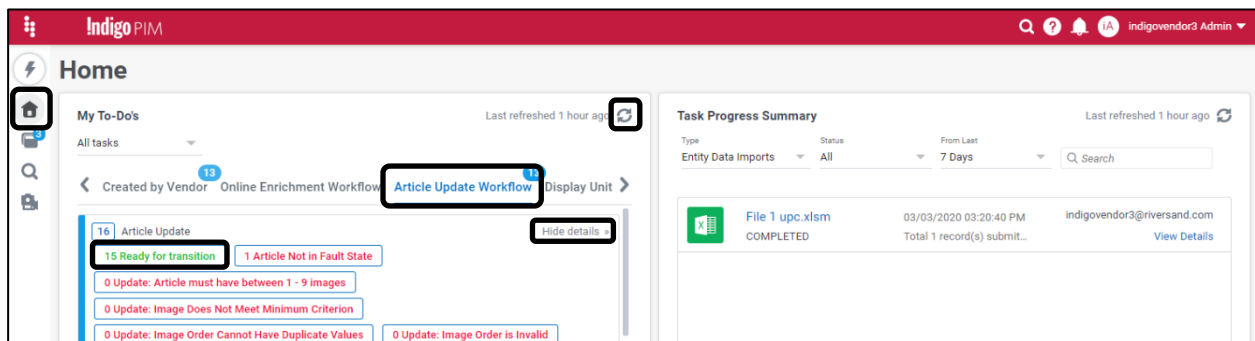


Fig. 11-1 Workflow Transition

16. Manually scroll and search for the UPCs you just updated or enter the UPC numbers in the search box

17. Select  the articles you just updated/want to publish

18. Click on **Actions**, then **Workflow Transition**

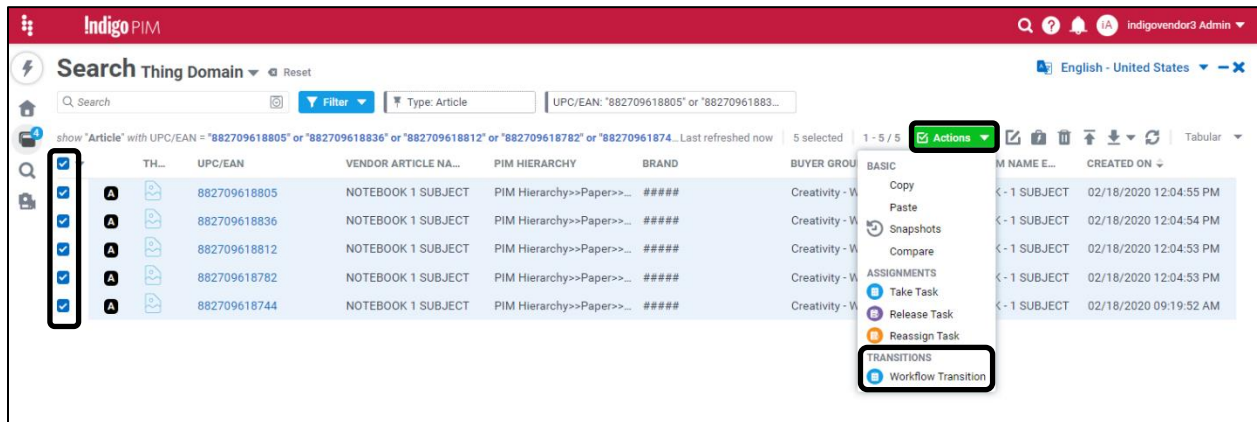


Fig. 11-2 Workflow Transition

19. Click on **Publish**

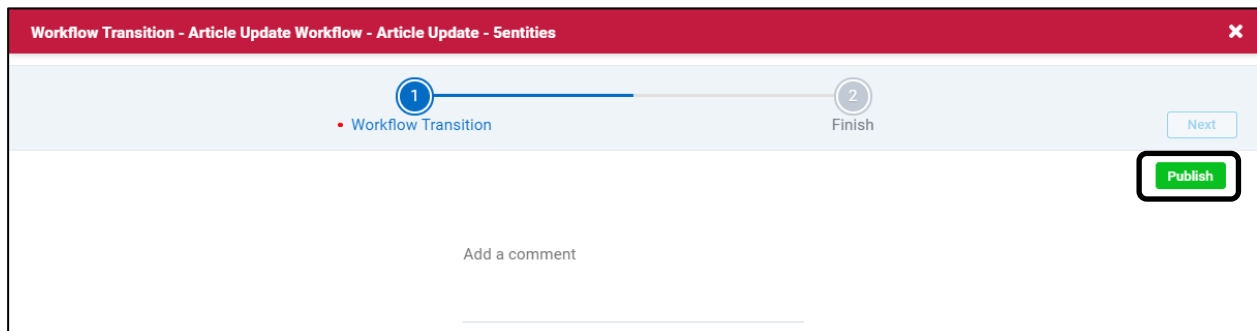


Fig. 12-1 Publish

20. Click on **Finish & Close**

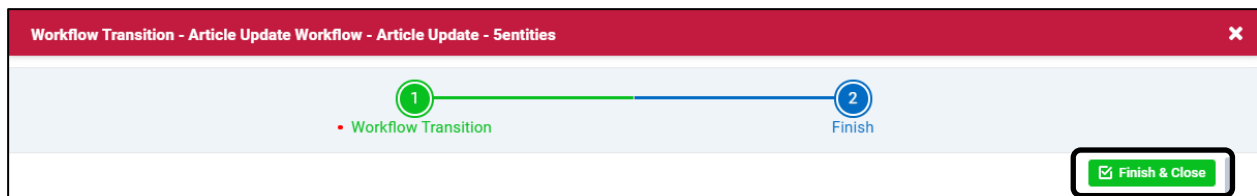


Fig. 12-2 Publish

**NOTE:** If some of the articles failed to publish due to some business criteria not being met, you will receive a failure message. For these articles, search for the UPC, correct the errored business condition and republish.

ID	MESSAGE	DETAILS
s4xPi1jzTgWIDDwvzHQgcQ	"Workflow" success	
gs9eyWg6Spmi28QDM_LtGA	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
n61zTj1AS-WmRz8GPDbHCA	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
hzOr22HBRn6MRsYJQwzW4A	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
4BCXEFaMTVqUymuvSDImJg	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update



Fig. 12-3 Publish

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**YOU HAVE SUCCESSFULLY MODIFIED MULTIPLE ARTICLES WITH THE SAME VALUE USING THE USER INTERFACE**

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## 2 Different Value Modification

1. Click on  then  Search Thing Domain This will take you to the **Search Page**.

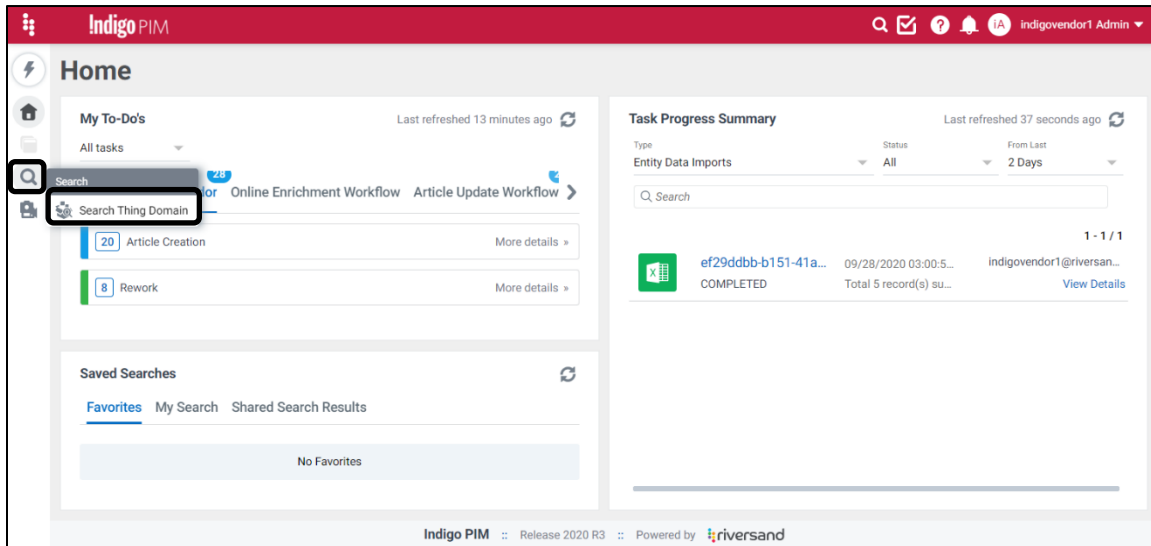


Fig. 13-1 Search

1. Search for the UPCs you want to edit by clicking on **Filter**, typing in **UPC**, selecting **UPC/EAN**, and then pasting in the UPC numbers and clicking on **Apply**.

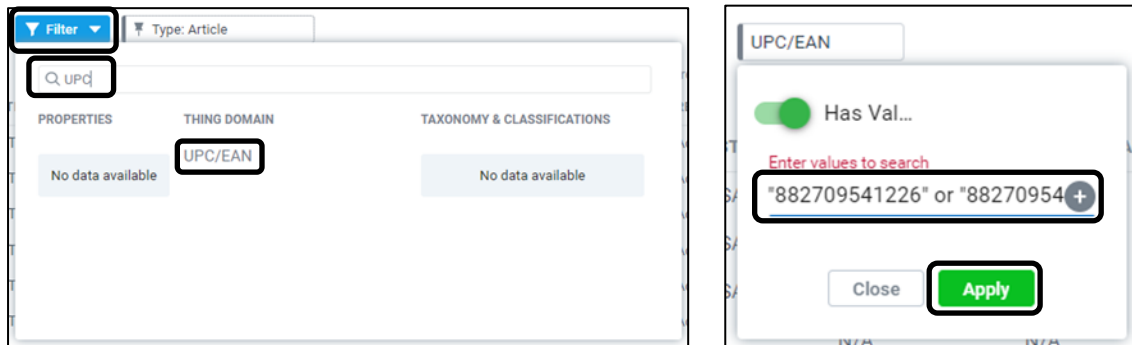


Fig. 13-2 Search

**NOTE:** Pasting in multiple UPCs from an Excel file will automatically create the correct formatting to search

2. Select  the first article you want to edit

3. Click on  (Quick Manage)

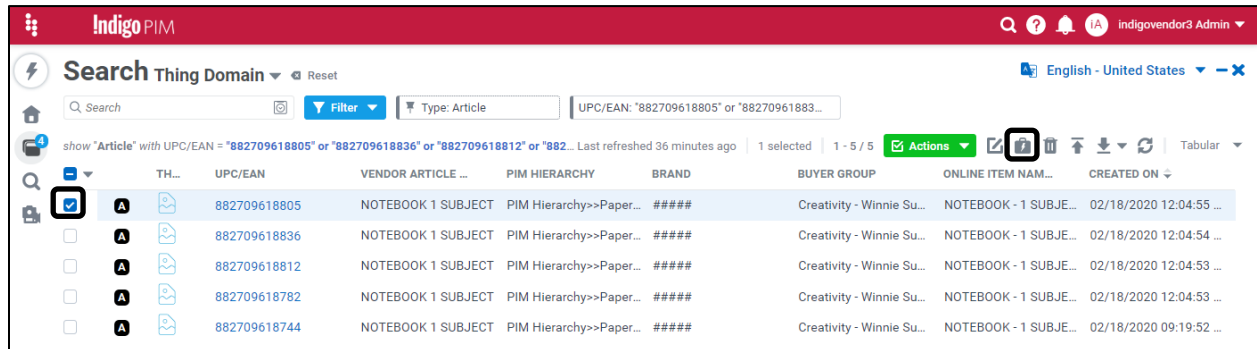


Fig. 14-1 Quick Manage

4. A right-side panel will open, showing a few attributes for the article. If the attribute you're looking to edit does not appear, click on the **Attributes** dropdown to find it.

Click on  (edit) and make the necessary edit(s).

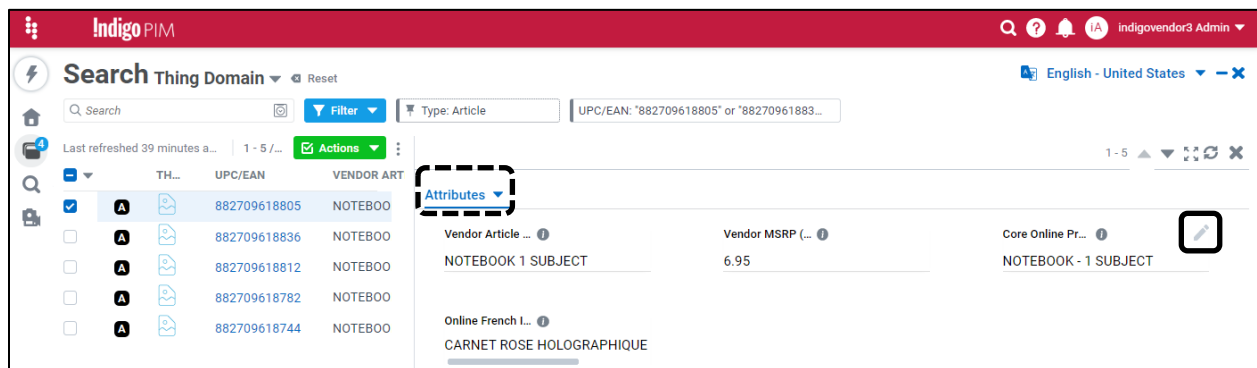
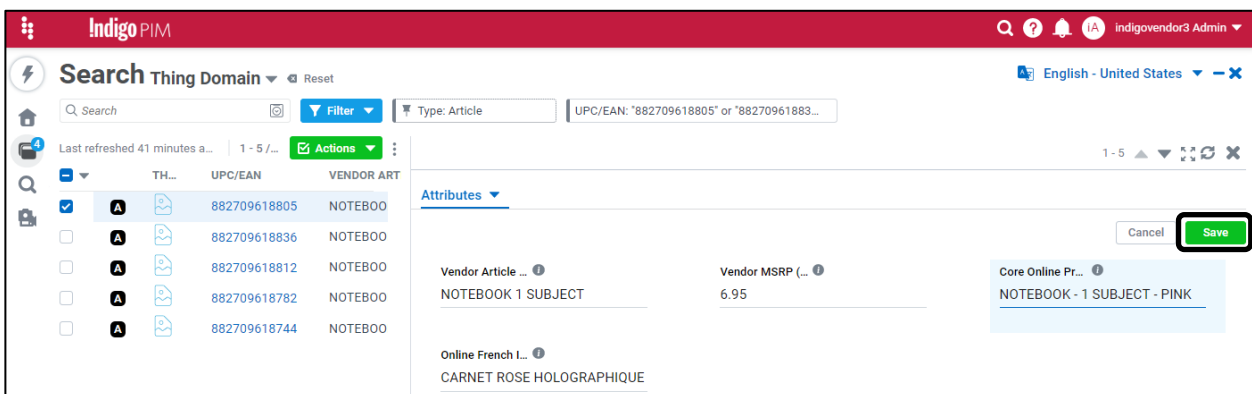



Fig. 14-2 Quick Manage

5. Click on 



6. Fig. 15-1 Save



7. Click on  to modify the next article

Repeat steps 5-7 for all the articles you want to modify.

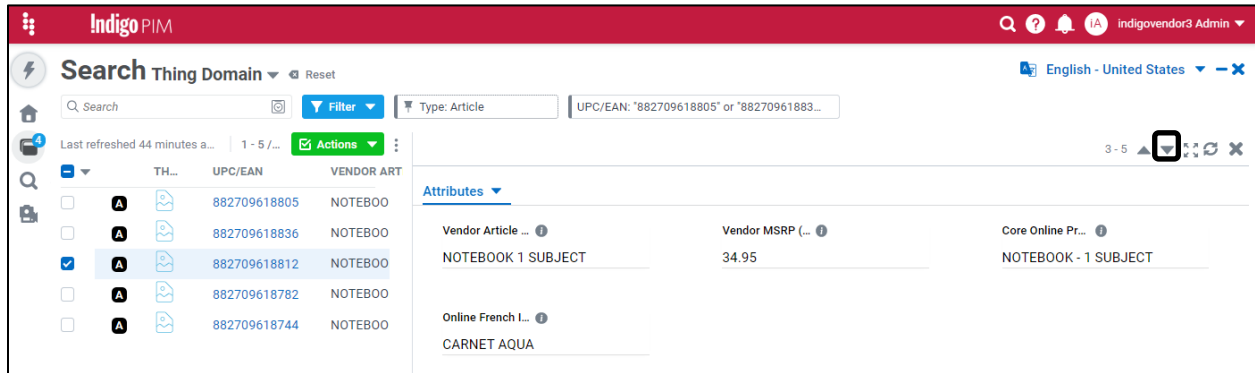


Fig. 15-2 Next Article

8. When you're ready to publish these modified articles, click on  to get back to **Home**

9. Click on  (refresh)

10. Click on the **Article Update Workflow** tab

11. Click on **More Details** under 'Article Update', then click on **Ready for transition**

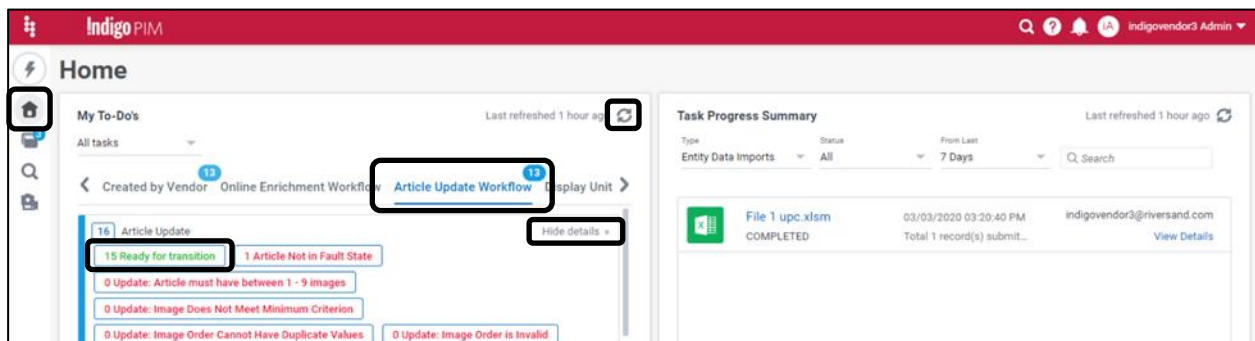


Fig. 16-1 Workflow Transition

21. Manually scroll and search for the UPCs you just updated or enter the UPC numbers in the search box

22. Select  the articles you just updated/want to publish

23. Click on **Actions**, then **Workflow Transition**

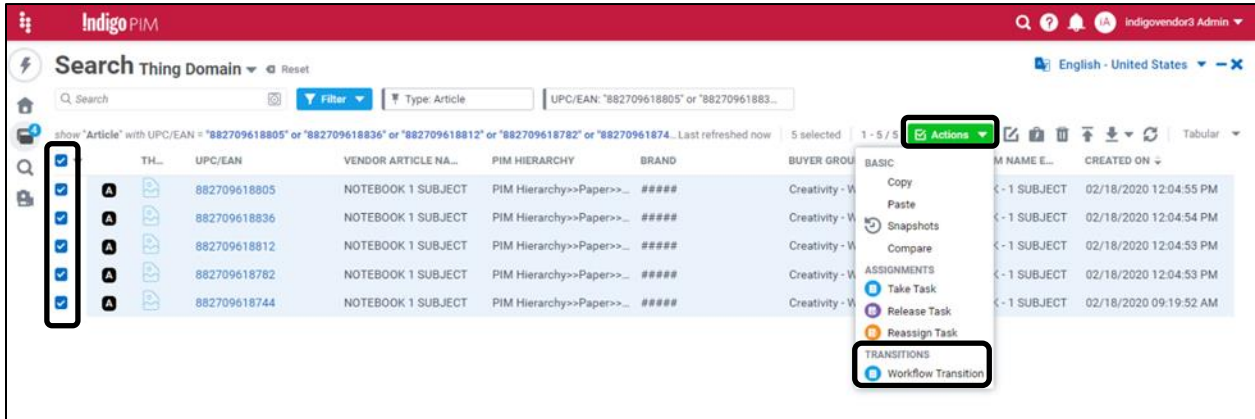


Fig. 16-2 Workflow Transition

24. Click on

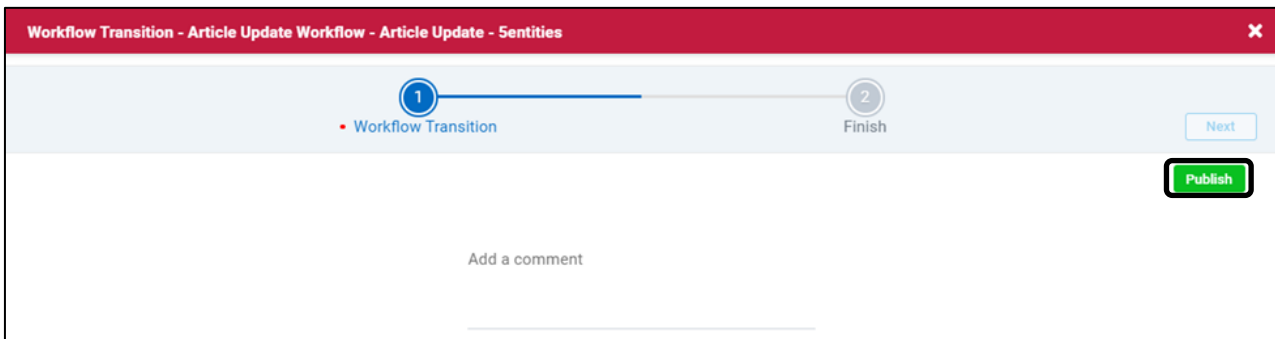


Fig. 17-1 Publish

25. Click on **Finish & Close**

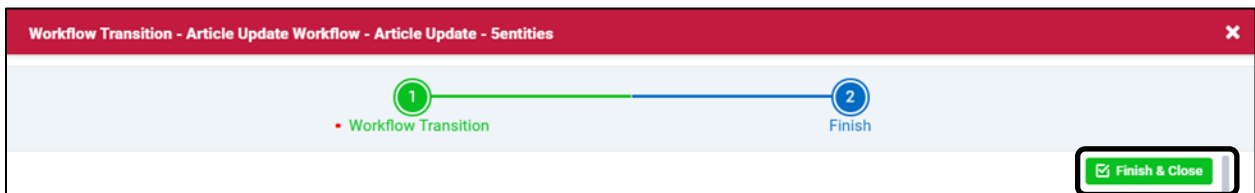


Fig. 17-2 Publish

**NOTE:** If some of the articles failed to publish, due to some business criteria not being met, you will receive a failure message. For these articles, search for the UPC, correct the errored business condition and republish.

ID	MESSAGE	DETAILS
s4xPi1jzTgWIDDwvzHQgcQ	"Workflow" success	
gs9eyWg6Spmi28QDM_LtGA	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
n61zTj1AS-WmRz8GPDbHCA	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
hzOr22HBRn6MRsYJQwzW4A	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update
4BCXEFaMTVqUymuvSDImJg	Workflow not successful due to failed business conditio...	Mandatory Attributes for Update

Fig. 17-3 Publish

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**YOU HAVE SUCCESSFULLY MODIFIED MULTIPLE ARTICLES WITH DIFFERENT VALUES USING THE USER INTERFACE**

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# ARTICLE MANAGEMENT EXCEL TEMPLATE

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## Modify Single or Multiple Articles

**NOTE:** Single and multiple article modifications using the Excel Template have the same set of instructions

### Let's take you through an example: Online Product Description English – CA

1. Click on  then  Search Thing Domain -- This will take you to the **Search Page**.

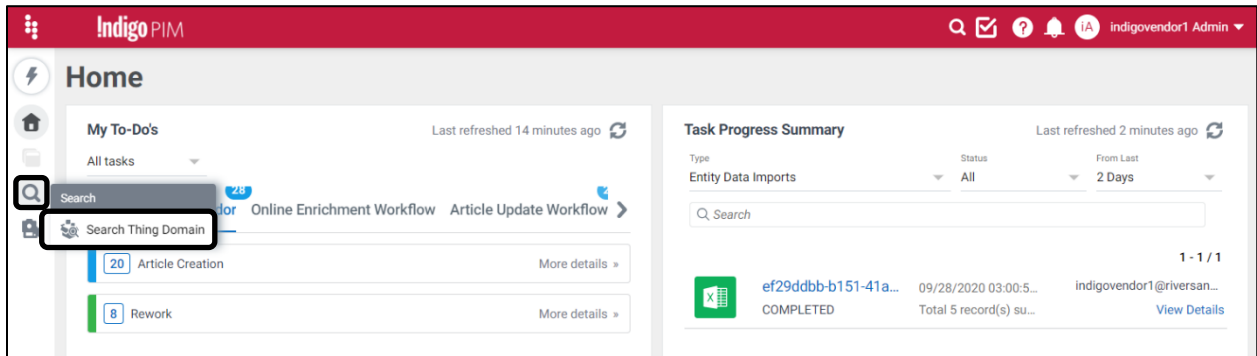


Fig. 18-1 Search

1. Search for the UPCs you want to edit by clicking on **Filter**, typing in **UPC**, selecting **UPC/EAN**, and then pasting in the UPC numbers and clicking on **Apply**.

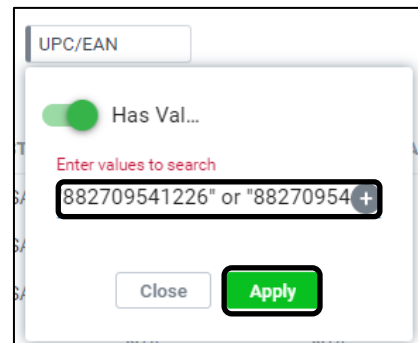



Fig. 18-2 Search

1.  Select the articles you want to edit

 **TIP:** If you're editing less than 100 articles, you can select  the top box . This will select all, if there are less than 100.

 **TIP:** If you're editing more than 100 articles, you can click on the arrow , **Select All**, then **Apply**

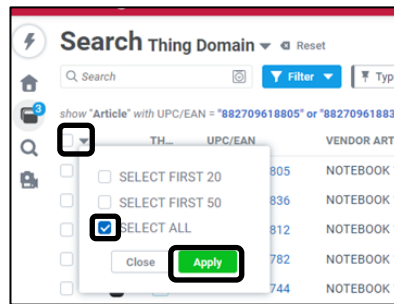


Fig. 19 Select All

2. Click on  and **Download in Excel**

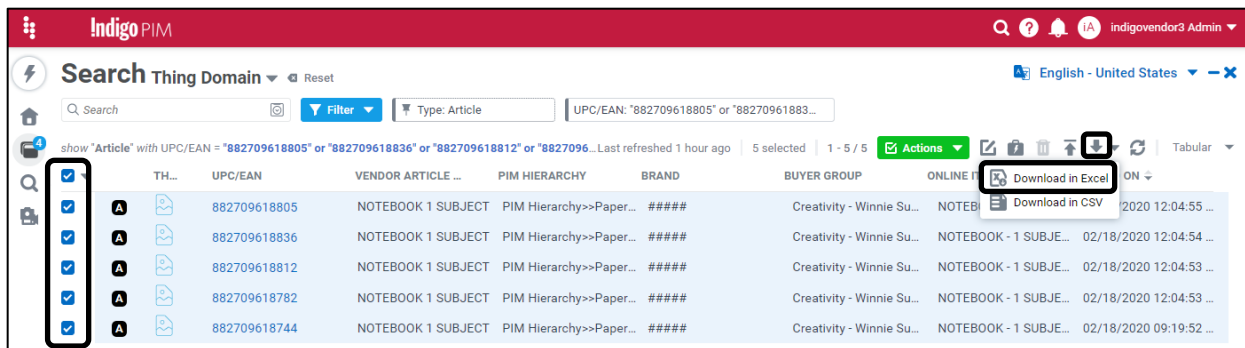





Fig. 20-1 Download

- In the **Name column**, type in the attributes needed to make the modification(s). For this example, type in: **Online Product Description English – CA** and **Vendor Article Name** in the Name column.
- Click  and  for each attribute you're looking to download
- Once all the attributes you want to download are in the 'Selected' section of the screen, click 

 **TIP:** The **Download All** option is not recommended. It's better to narrow down your search

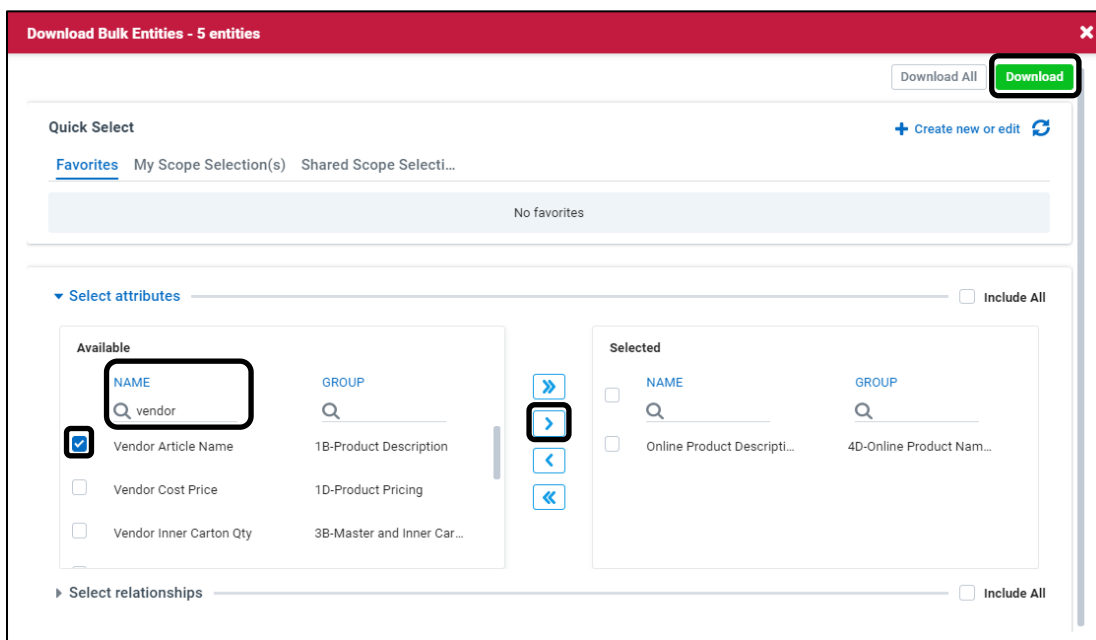


Fig. 20-2 Download

- Click on **Finish & Close** or **Show task details**

**NOTE:** If you click on *Finish & Close*, the excel template will automatically download when its ready. If you click on *Show task details*, click on the hyperlinked File Name to open the excel template.

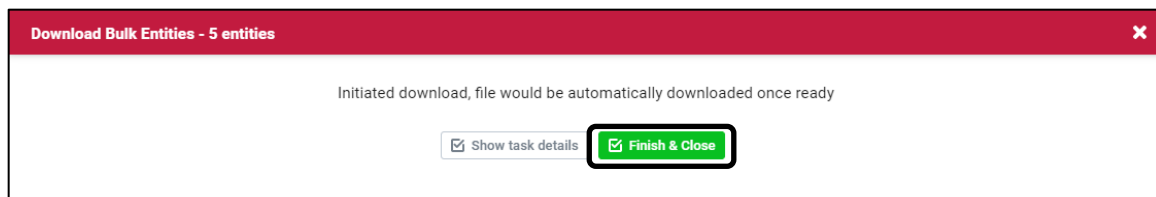


Fig. 20-3 Download

7. Open the downloaded template
8. Click on **Enable Editing** and **Enable Content**
9. Click on the **Entities** tab
10. Modify the applicable fields.

**NOTE:** Ensure the fields have correct formatting, as per the Data Dictionary

**NOTE:** For drop down fields, [NULL] shows as an option. Do not use this option.

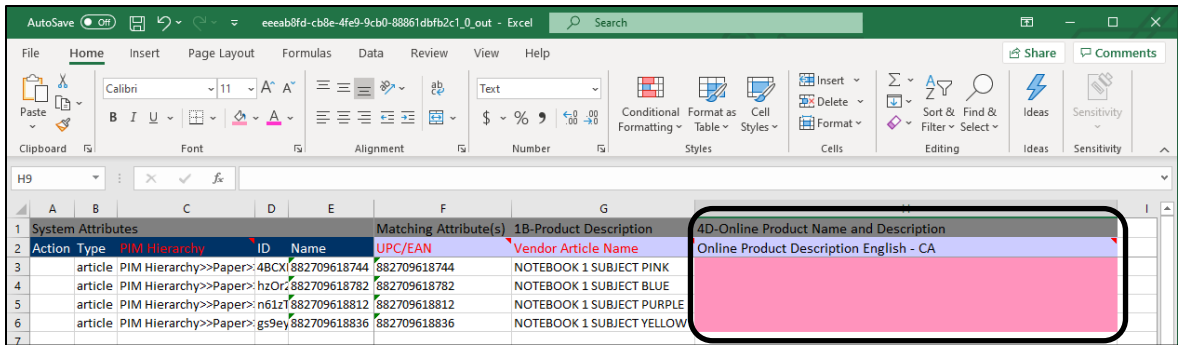


Fig. 21 Excel

11. **Save** the template in your folder of choice so its ready for upload
12. Click on  (upload)

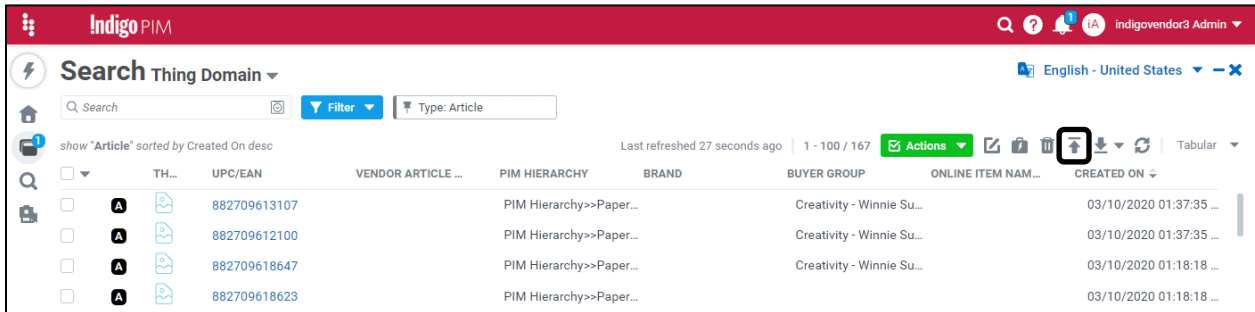


Fig. 22-1 Excel Upload



13. Click on **Upload File** or drag and drop the file.

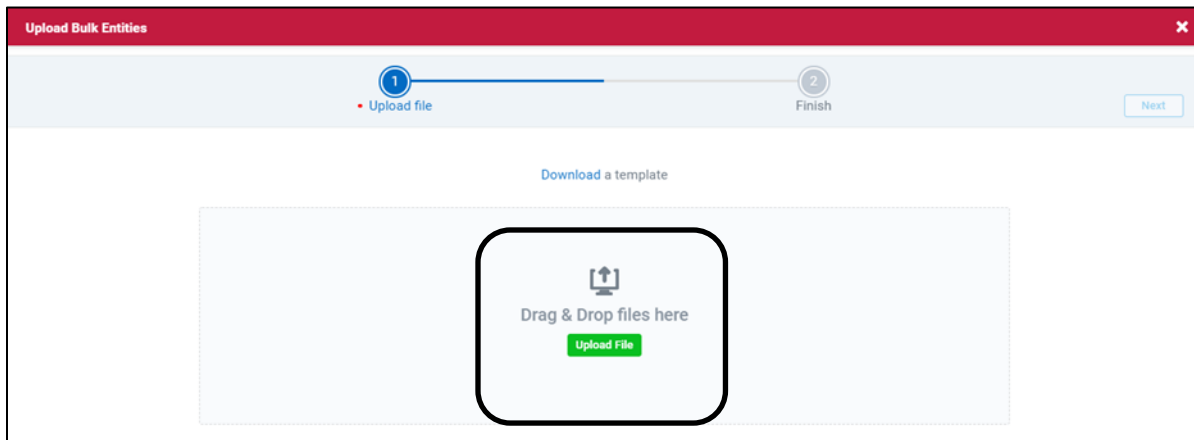


Fig. 22-2 Excel Upload

14. To check that the upload was successful, click on **Show task details**

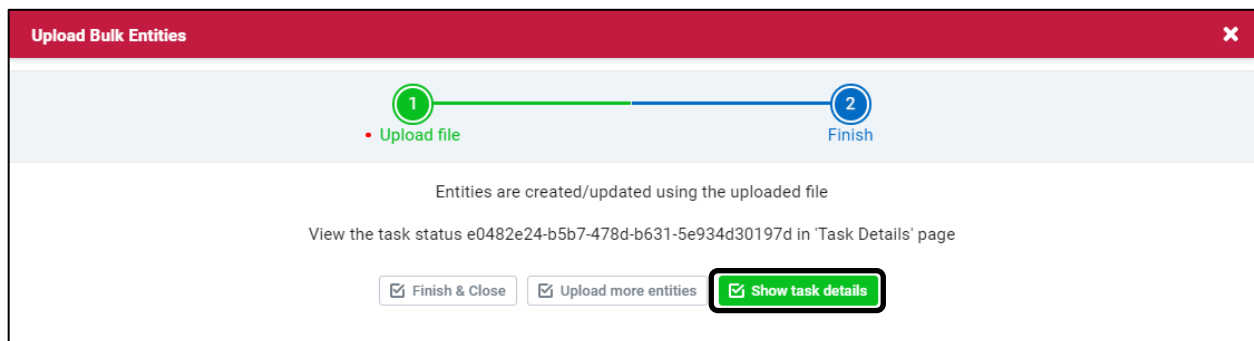


Fig. 22-3 Excel Upload

15. Click on Refresh . The **Processing Details** pie chart should be green, and the **Sub-details** pie chart should be orange.

**NOTE:** If Processing Details appears fully or partially red, indicating an error, click on the word 'error' to investigate and make necessary changes

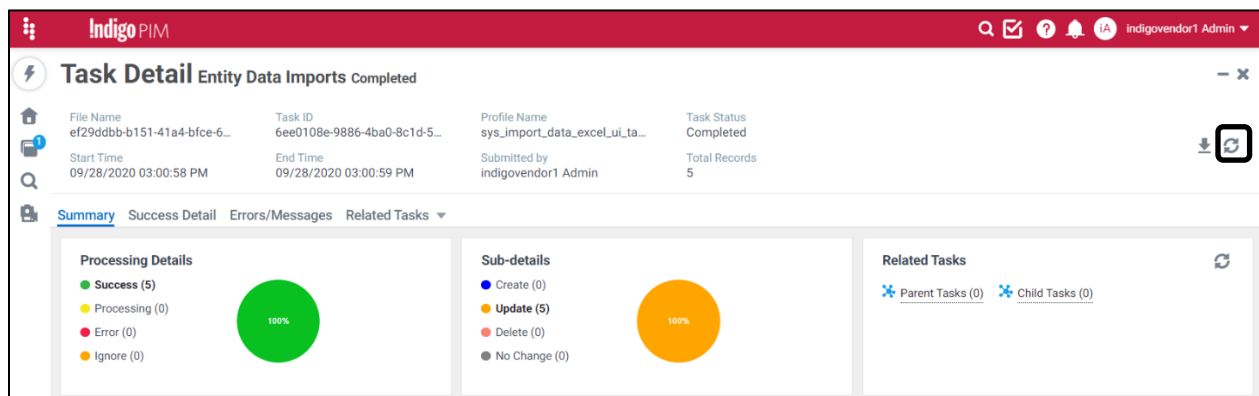



Fig. 23 Processing and Sub-details

16. To publish these modified articles, click on  to get back to **Home**

17. Click  (refresh)

18. Click on the **Article Update Workflow** tab

19. Click on **More Details** under 'Article Update', then click on **Ready for transition**

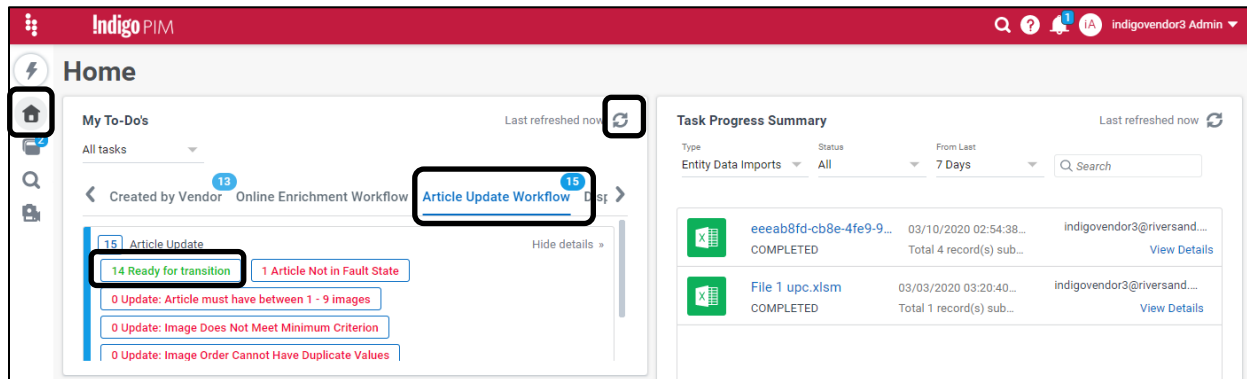


Fig. 24 Ready for transition

20. Manually scroll and search for the UPCs you just updated, **Filter**, or enter the UPC numbers in the search box

21. Select  the articles you just updated

22. Click on **Actions**, then **Workflow Transition**

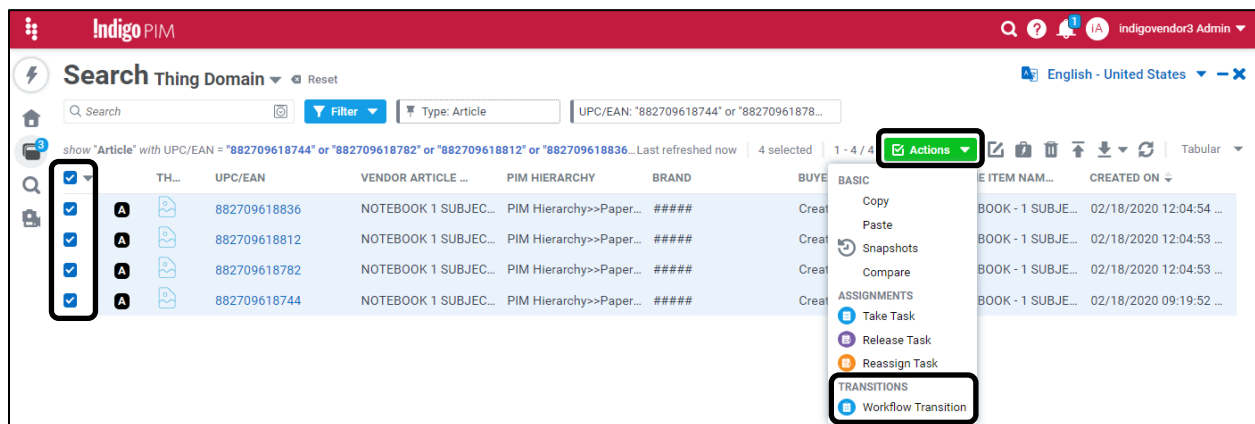


Fig. 25 Workflow Transition

23. Click on **Publish**

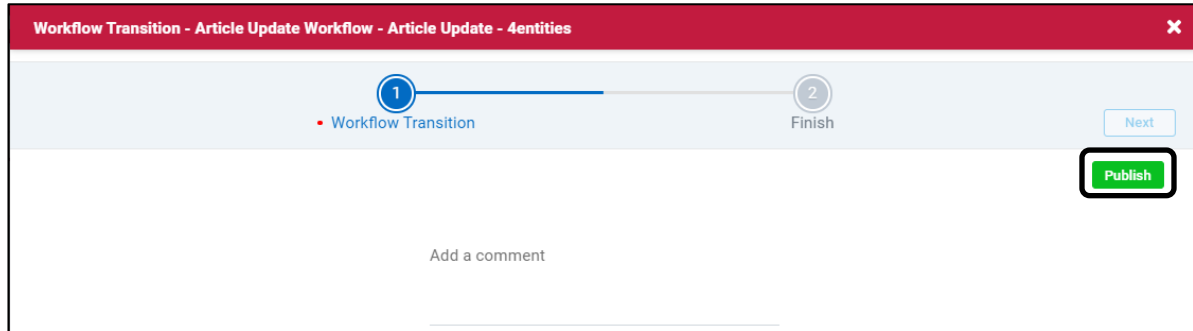


Fig. 26-1 Publish

24. Click on **Finish & Close**

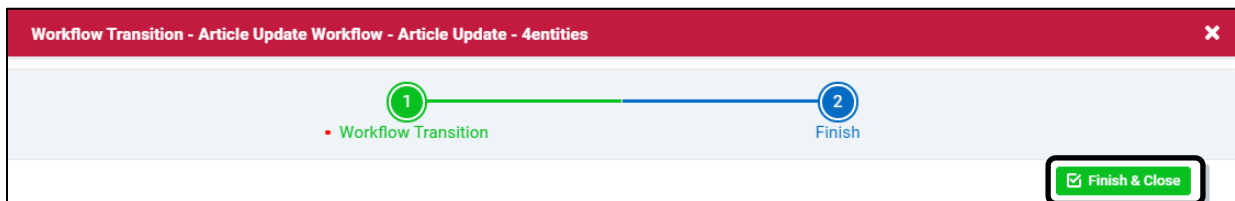


Fig. 26-2 Publish

**NOTE:** If some of the articles failed to publish, due to some business criteria not being met, you will receive a failure message. For these articles, search for the UPC, correct the errored business condition and republish.

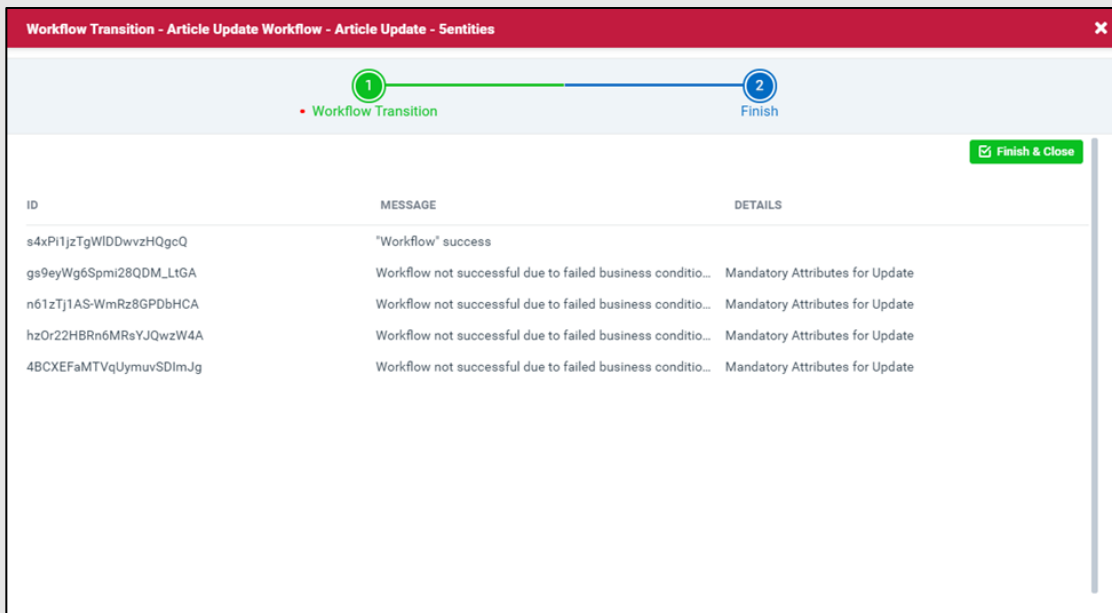


Fig. 26-3 Publish

**YOU HAVE SUCCESSFULLY MODIFIED AN ARTICLE OR ARTICLES USING THE EXCEL TEMPLATE**

# APPENDICES

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## Appendix 1: Updating Critical Attributes Sent Back for Rework

If you updated one of the critical attributes incorrectly, the Master Data or Onboarding team will send the article(s) back to you for rework. You will receive an email with the UPCs to rework.

1. On the **Home** page, click on the **Article Update Workflow**, then on **Article Update**

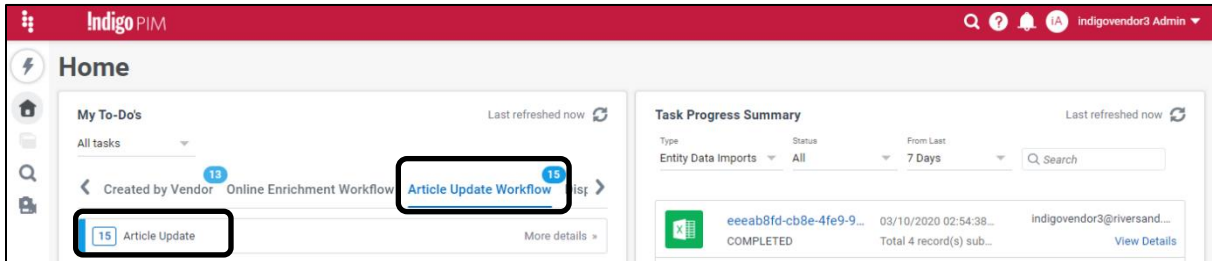



Fig. 27 Article Update

2. Copy and paste the UPC(s) sent from Master Data/Onboarders into the search bar
3. Make the necessary rework changes (these should be identified in the email you received).
  - If you're modifying a single article, click on the UPC or double click on any other field of the article to open the **Manage Article Page**. Follow the [Modify a Single Article](#) instructions on page 5.

 **TIP:** In the Workflow section, click on Master Data Team Approval or Onboarder Approval to view the comment on what to rework.

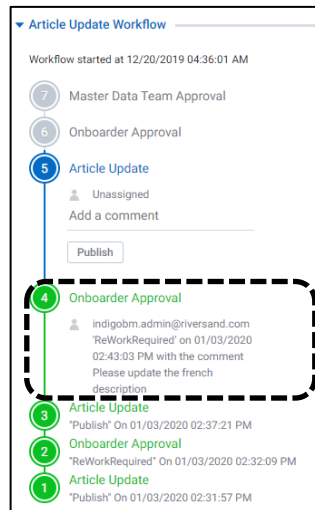


Fig. 28 Rework Comment

- If you're modifying multiple articles, follow the [Modify Multiple Articles](#) instructions on page 8.


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**YOU HAVE SUCCESSFULLY EDITED CRITICAL ATTRIBUTES SENT BACK FOR REWORK**

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## Appendix 2: Web Enrichment

**NOTE:** If you chose not to fully enrich your articles during the article creation phase, the Onboarder will send articles back to you that require online attributes. To add online attributes, follow the instructions below:

1. Click on  to get to **Home**
2. Click on **Online Enrichment Workflow**.  
Then, click on either of the following:
  - a. **Ready for transition** – Articles will appear here if you filled in all the vendor mandatory online attributes, but potentially with incorrect values
  - b. **Mandatory Online Enrichment Attributes by Vendor** – Articles will appear here if you have not filled in all the vendor mandatory online attributes
  - c. **Mandatory Vendor Attributes** – Articles will appear here if you have not filled in the vendor mandatory attributes

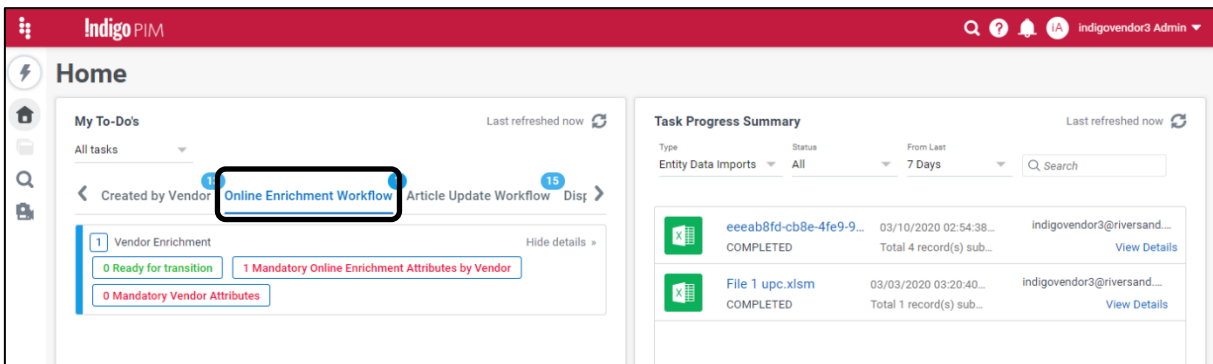



Fig. 29-1 Online Enrichment Workflow

3. If you're using the UI: click on the article and follow the [Modify a Single Article](#) instructions on page 5 to fill in the online attributes.

If you're using Excel: Select  the articles and follow the [Modify Single or Multiple Articles](#) instructions on page 20 to fill in the online attributes



**TIP:** Remember to use the *Data Dictionary* for guidance

**NOTE:** You'll notice that under the Online Enrichment Workflow, you need to click on **Send to Onboarder** (instead of 'Publish')

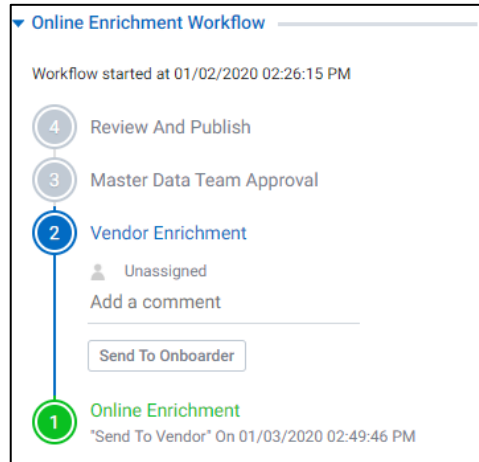


Fig. 29-2 Online Enrichment Workflow

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**YOU HAVE SUCCESSFULLY ENRICHED YOUR ARTICLE(S) FOR ONLINE**

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