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Electronic Catalogs Platform Manual

Introduction

The aim of this manual is to explain the operation of the **Electronic Catalog Platform** developed by the Consorci de Serveis Universitaris de Catalunya (CSUC).

This platform is necessary for the presentation of offers by approved providers and for consultation, price comparison and subsequent processing of orders by affiliated entities. Users of Universities and Research Centers can access the data in real time, search freely in the Catalog and make comparisons and similarities in order to achieve the best possible conditions.

The contact details of the affiliated providers and those responsible for supporting the purchases, who are responsible for maintaining the platform and solving incidents, also appear.

Section 6 (Information) of the manual explains how to access the platform's manuals and video tutorials.

Data Loading and Search Workflow



Data upload and search workflow

First, the provider must upload their articles using the template provided by the CSUC. These articles are automatically uploaded to the Electronic Catalog database and would already be available for later consultation by users.

Users can search for the products in question and generate the corresponding ordersthrough their own purchase platforms.

1. Access to the Platform

Access to the Platform is done through the web address https://mlaboratori.csuc.cat/ using User and Password or Digital Certificate:





Access to the platform

You have a **Test Catalog** available, which can be accessed with the following credentials:

User: prov

Password: prov

Once the **Definitive Catalog** is available, those users who already have access to the previous version of the Platform will be able to access using either of the two methods described above.

New users must ask the managers of their center to register them or request access by email to the <u>platform</u> administrators:

Nerea Carrera: nerea.carrera@csuc.cat / 935516238

Reynaldo Martos: reynaldo.martos@csuc.cat / 935516217

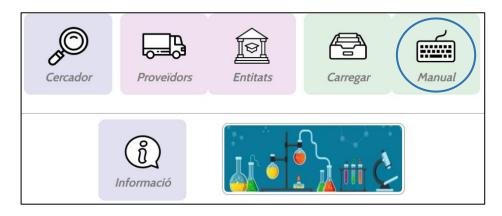
To access via SSL digital certificate, once the user has the certificate, they need to ask the administrators (mentioned above) to give them access. You will have to provide your NIF / NIE / ID.

2. Catalog loading system

2.1. Loading new products

To load a product, the provider has two possible options.

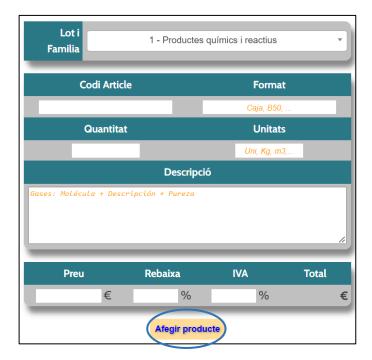
The first option is <u>manual insertion</u>, which is used to load articles one at a time. The provider goes to the "Manual" page of the main menu:



Manual loading



The next step is to fill in the following information and click on "Add product".



Manual data entry

Mandatory and non-mandatory fields are found in the <u>Electronic Catalog Template</u>. This template can be found on the "Information" page of the main menu and as an Annex to the contractor profile of the corresponding tender.





The second option is <u>intro via template</u>, which is a massive way to upload products. The provider must download the template, mentioned above, and fill it with their products.



Template example

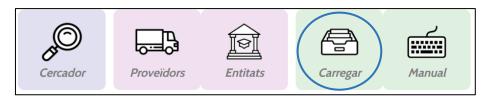


Templates have a tab with instructions to avoid problems while doing product uploads and which fields are required. <u>These fields and their mandatory nature may vary depending on the corresponding tender</u>. Example:

Instruccions Plantilla	Obligatori
Categoria	
Codi Article: Codi de l'article de la vostra empresa. Pot o no, coincidir amb el Codi del Fabricant.	Sí
Codi Fabricant: Codi de l'article que dona el fabricant.	Sí
Codi CAS, pels productes químics: No pot haver cap text, ha de ser un valor numèric.	Sí
Descripció de l'Article	Sí
Format de l'Article	Sí
Marca Comercial	Sí
IVA %: 0,00 / 0,10 / 0,21. No pot haver cap text, ha de ser un valor numèric.	Sí
Preu Final (Sense IVA): Descomptes, ports, taxes i altres tributs ja aplicats. No pot haver cap text, ha de ser un valor numèric.	Sí
URL de l'Article: Pàgina web de l'article, sigui a la vostra pròpia web o la del fabricant amb el http://davant.	No

Example of Template Instructions

Once the provider has made his catalog, he goes to the "Upload" page of the main menu:



Select the Excel file to upload and click on the upload icon:

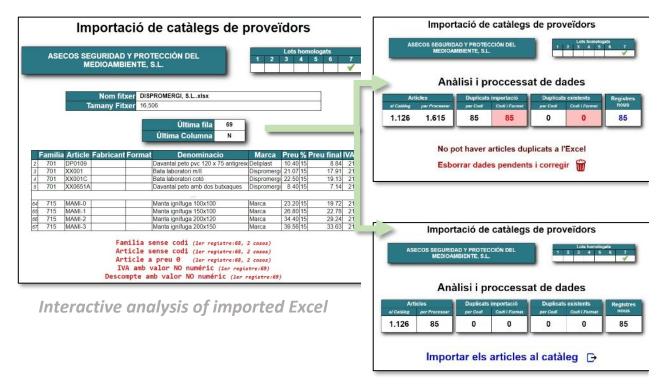


Upload via template

There cannot be duplicate products in the catalog.

Providers can register new products, update existing products and deregister obsolete ones at any time of the year.





- The catalog upload system supports both CSV and XLSX.
- Ability of the provider to upload the data file independently.
- Possibility of individual manual introduction of each product.
- Online processing (web) of XLS documents from providers, to make mass uploads.
- Management of articles by the administrator and the provider.
- Analysis of the content of the data file, with information on the incidents found.
- Processing with elimination of duplicates, conflicts, limitations, etc.

2.2. Modification of products

To modify a product, the provider has two possible options.

The first option the provider has to modify products is the <u>manual way</u> and is done by going to the "Searcher" page:

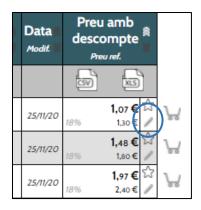


Manual modification

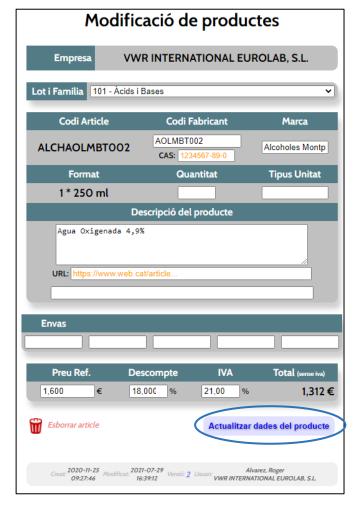
The provider searches for the product in question and ticks the pencil box. For example:







Then modify the product in question and update the product data:



Manual modification of products

The second option is <u>modification via template</u>. The provider goes to "Upload", loads the new Excel with the modified product and the data will be updated.





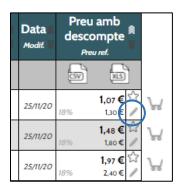
Massive modification

- Providers and administrators have the possibility to modify the product data from the product sheet.
- Providers can modify all fields except the item code and format.
- The system, when adding and modifying amounts, performs the calculation itself, to avoid discrepancies and variations of any kind.
- You can modify the products directly, without having to cancel them beforehand.

2.3. Removal of products

To remove a product, the provider also has two possible options.

The first option is the <u>manual way</u>. The provider must search for the product in question and check the pencil icon:



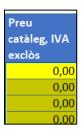
Then check the "Remove product" box:

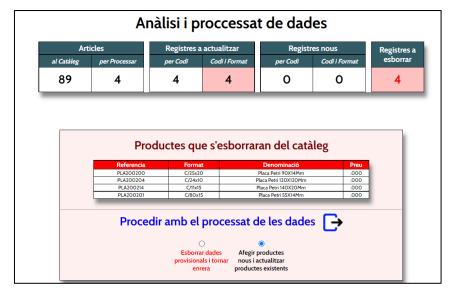


Manual removal of products

The second option is <u>deletion via template</u>. The provider must load the new Excel by putting a **price of 0 on the products he wants to remove** and they will be unregistered:







Removal of brands

To remove products of a specific brand, you <u>must search the catalog for the brand</u> in question. The provider must export the data:



To remove products of this brand, you will load the Excel by setting price 0 and they will be unsubscribed.

3. Product Finder

To search for a product, the provider must go to the "Search" page of the main menu:





Product finder

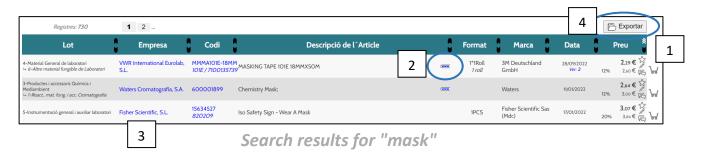
You must define your needs so that the Platform shows the available products that best suit them:



Provider finder home screen

- Search system with simultaneous multi-filtering capability. Once we have defined our needs through the filters, click on the magnifying glass to search.
- High search speed (maximum 0.01s), faster than in Excel or Access.
- The system is limited to the search for own products.
- Access to the original documentation from which the data has been extracted.
- Product search systems by "match" (exact search of complete words)
- To search for all words or codes that start the same, you can put an asterisk "*" or activate the Extended Search.

3.1. Search engine results





- Compact view, showing the offer data. These data may vary depending on the corresponding tender.
- Ascending and descending sorting system in the header of each column (1).
- Pagination of 100 products, with free scrolling and summary of found products.
- Direct links to the product website (www) (2).
- By clicking on the provider's name (3) you can access the provider's file, which provides more information, such as their website, order e-mail...
- Data export to CSV (up to 400,000 records) and Excel (up to 10,000 records) (4).

4. providers

By going to Providers from the main menu, the list of providers admitted to the tender appears, information on the conditions of sale of offers (<u>which will vary depending on the corresponding tender</u>), access to the contract and the number of uploaded articles that the providers have on the platform (clicking on Products (1)).

Providers can only see their data, but users can see everything.



Access to Providers



List of Providers

Clicking on the provider's name in blue (2) gives access to data such as the CIF, address, website, telephone, contact, e-mail, logo, etc.

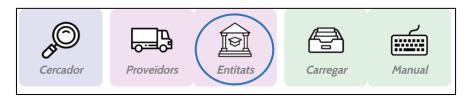




Company file with provider data

5. Entities

The platform has a portal of entities, from which it is possible to see the data of the entities affiliated to the corresponding tender and the categories to which they are affiliated.



Access to Entities

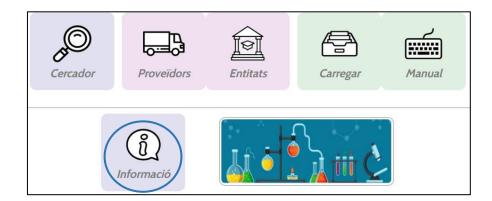
Under "Entities" in the main menu, you will find the following list with information on the corresponding entities, membership agreements and contracting profiles.



List of affiliated entities



6. Information



Access to Information

In Information you will find information about the corresponding tender, the providers manual and the details of the person in charge of the catalogue, who can be contacted, preferably by email, to resolve any doubts.

By clicking on the provider's manual, Unidisc is accessed, where you can find: the product import template, the manuals and video tutorials for operation, the manuals and video tutorials for possible errors while making uploads and the corresponding contest FAQs.



Information

7. User management

The platform has a user registration and manager in the system, where it is possible for **coordinating users** to create, delete and modify users of their entity. However, a **normal non-coordinator user** cannot do this.



By clicking on the User (top right), the following screen is reached:



Registration and user manager

By clicking on the "Select a User" box, it is possible to search for a specific user from the company itself, but not from other companies. All users are authorized to search and view the other users of their own entity.

By clicking on the "Personal" box, all users can manage their personal data, the catalog access system (digital certificate or password) and can view their accesses.



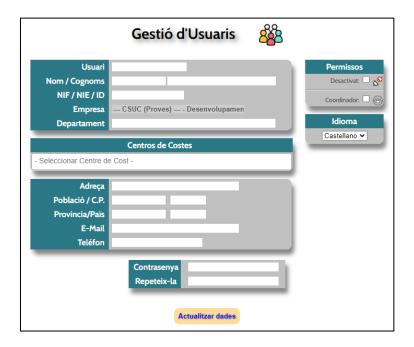
Manager of the user himself

It is possible to change the language of the platform. In order for it to be effective, you must log out after changing the language and log back in.

User coordinators are authorized to deactivate and delete users.

By clicking on the "Add user" box, coordinating users can create new users:





Add new users

The DNI, Mail and telephone are optional, but the rest of the data are mandatory. An appropriate password must be created.

8. Business management

By clicking on the Company (top left) (in this case CSUC Proves), you will reach the following screen:



Data manager of the company itself



All users are empowered to view their own entity's data.

The personal data of companies and entities that can be modified are those referring to: tax code, name, registered office, the contact of the person in charge of the entity, the data of the electronic invoice and the corresponding contact e-mails, among others