

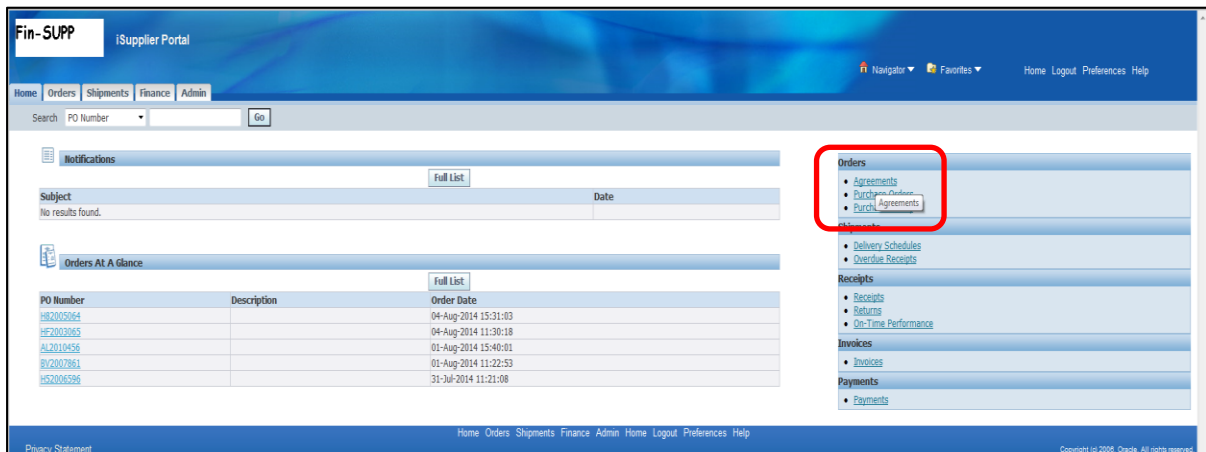
Reviewing, Creating & Uploading Catalogues via the iSupplier Portal

Obtaining your Catalogue Information

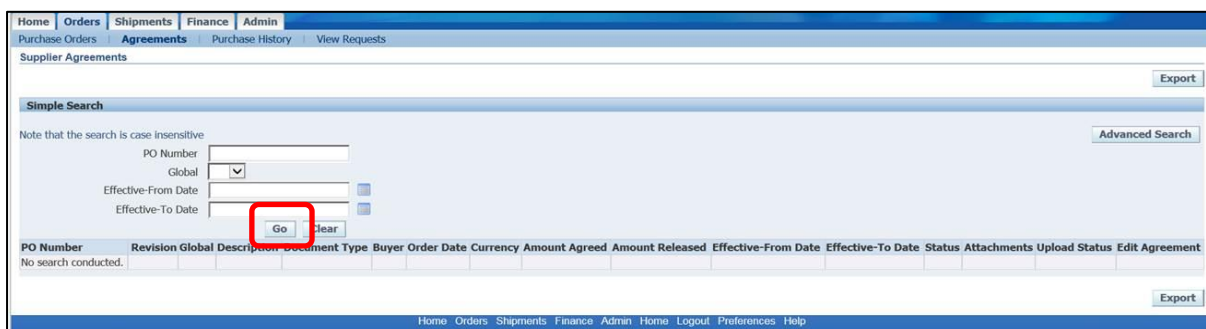
The University iSupplier portal is used for exporting and uploading hosted catalogues into the University's Oracle Financials system. The portal is accessed via the following link:

<http://www.admin.ox.ac.uk/finance/isupplier/>

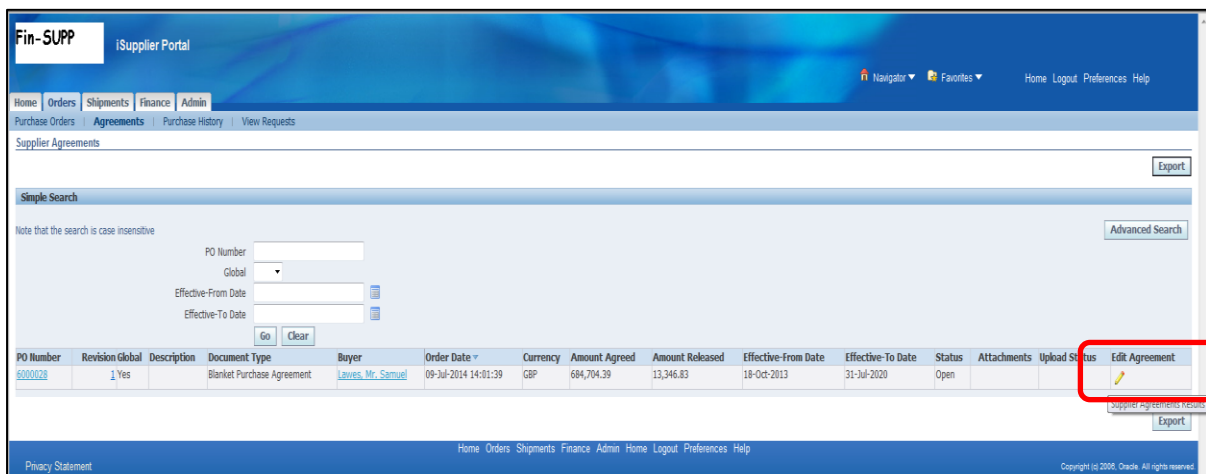
To export your catalogue from Oracle log into your iSupplier account and you will be taken to the Home tab, select 'Agreements' from the 'Orders' menu on the right hand menu:



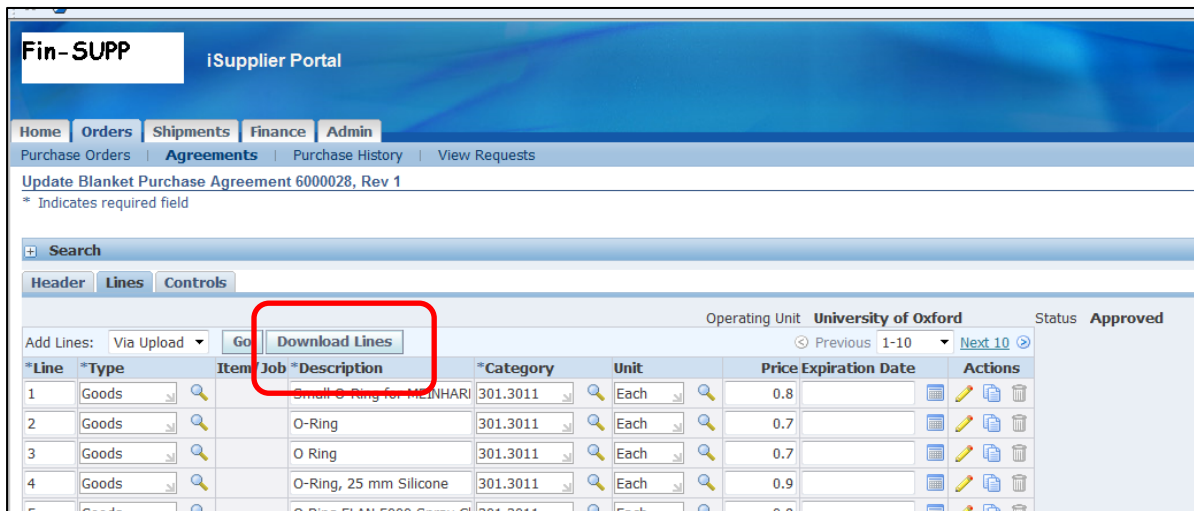
Select 'Go' and this will take you to the Agreement:



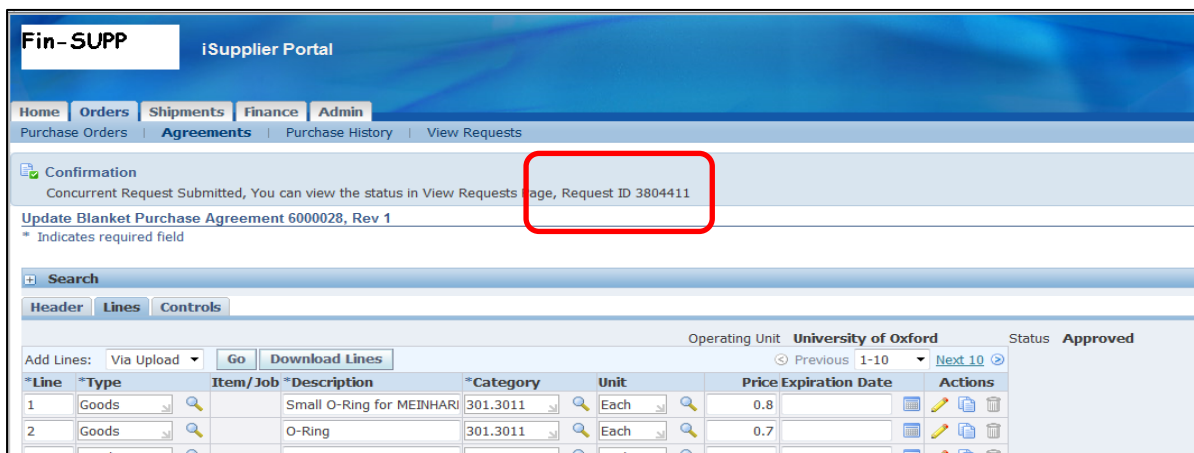
Select 'Edit Agreement':



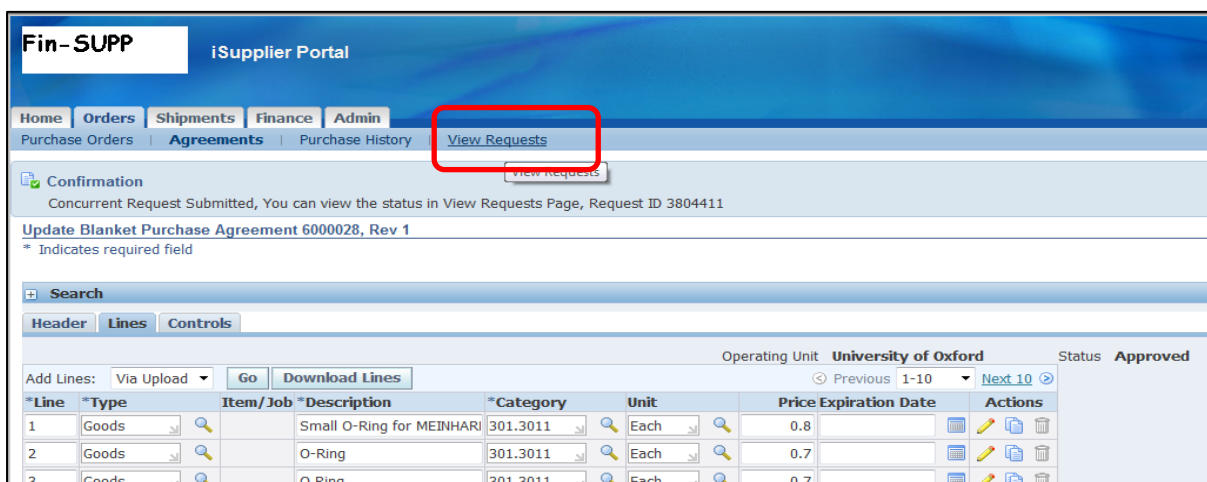
This will open the agreement, and from here select 'Download Lines':



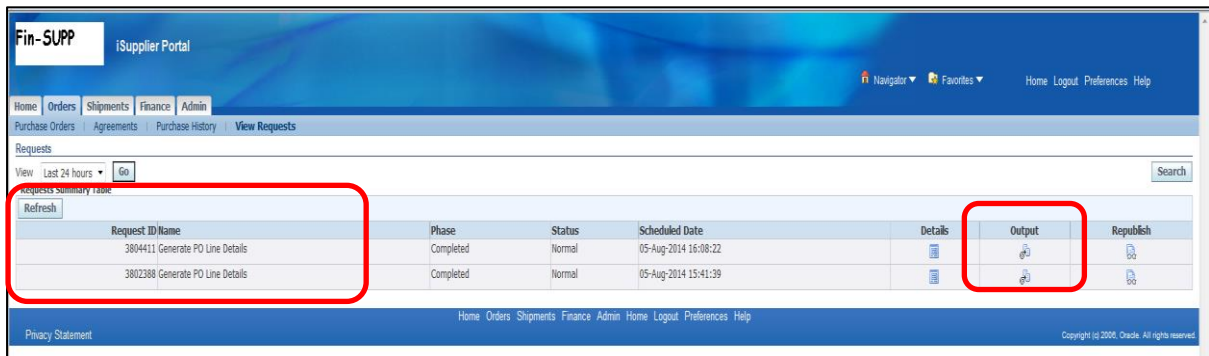
This will generate a Request ID:



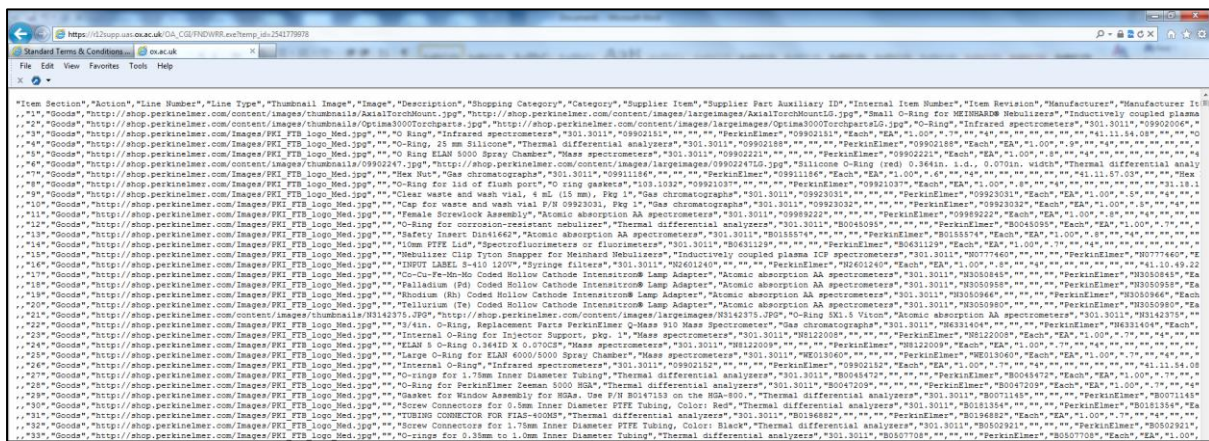
Click on 'View Requests':



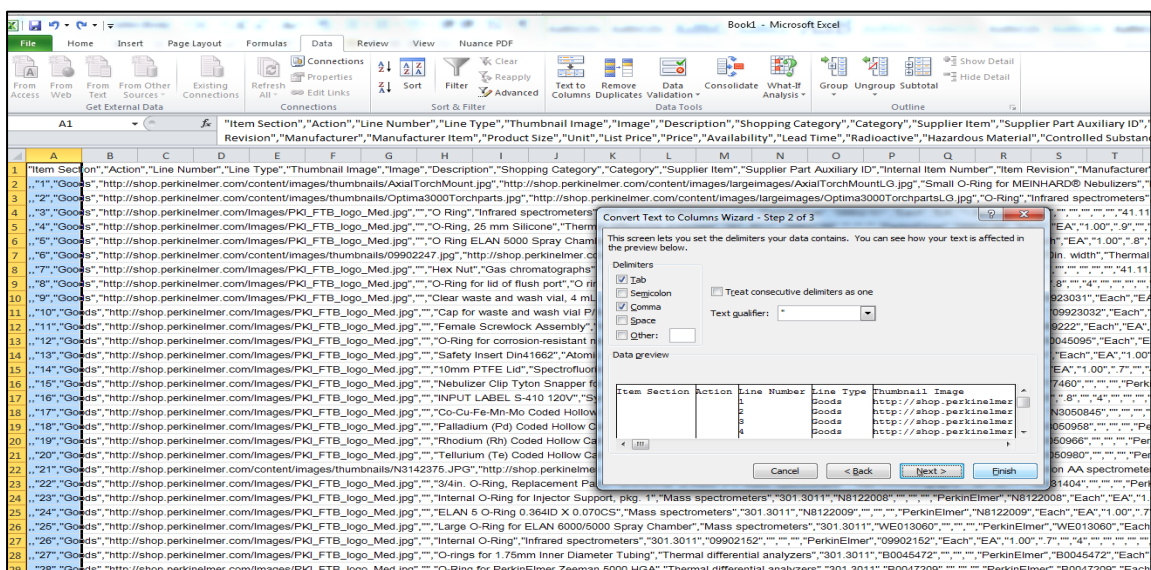
Search for the 'Request ID' generated – if this has not generated an output click 'Refresh' until it does so. Once an output has been generated, click on this and the catalogue will be exported as a text file:



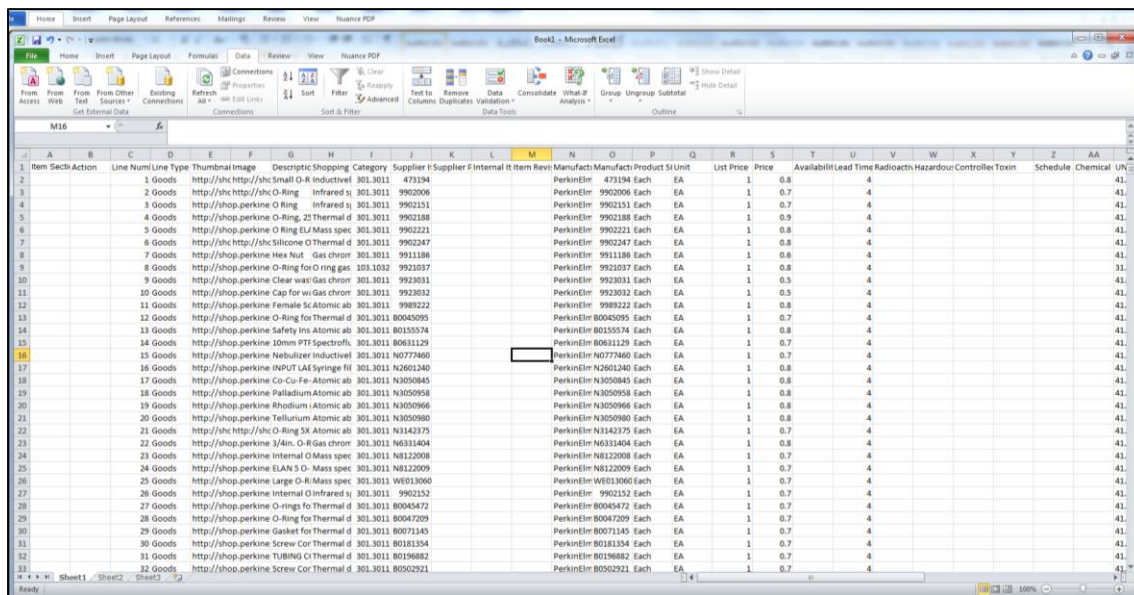
Once an output has been generated, click on this and the catalogue will be exported as a text file.



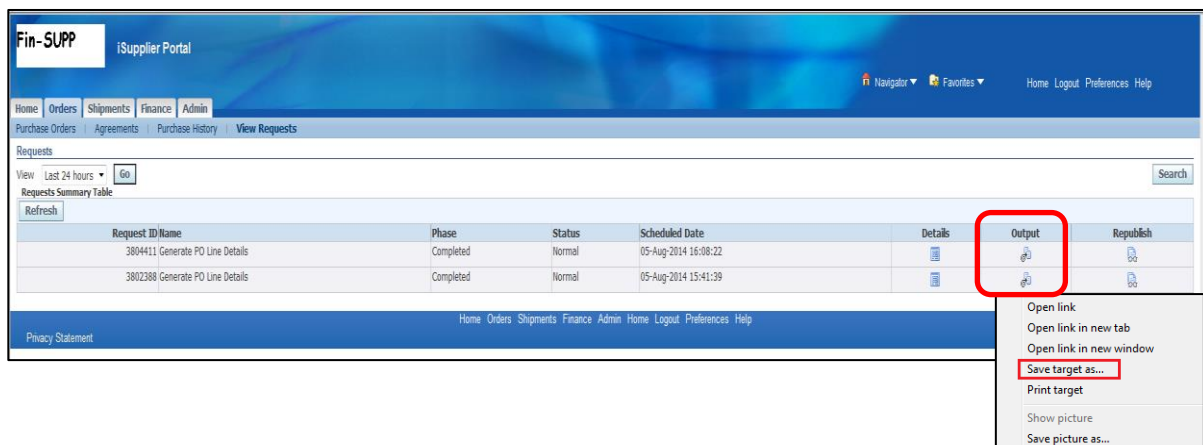
You can either copy this and paste it into Excel, or save the text file and open it in Excel, using the 'Text to Columns' tool in Excel with 'Tab' and 'Comma' as the Delimiters:



This will format the file in an appropriate way which will form the basis of your update file which you will import via iSupplier:



If the catalogue is large then it may time out before the output is generated. If this occurs you can 'right click' on the 'output' icon and select 'Save target as...' – this will give you the option to save the output as a text file without the concurrent programme having to run to generate the file:



Once saved repeat the steps outlined above to open the file in Excel in an appropriate format.

Creating / Updating Your Catalogue

Once you have exported your catalogue you need to create a file which will be used to upload amendments and additions to the catalogue. The export should always form the basis of the upload file as this represents the current file which is live in the system. However, the export will need the appropriate 'header' adding before it can be re-loaded into the system (the first 10 rows of the file):

1	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	#ENCODING	WINDOWS-1252															
2																	
3	Language Sect	EN-US															
4																	
5	Catalog Sectio	Title	Date	Source													
6																	
7																	
8	Header Sectio	Documer	Documer	Operatin	Supplier	Supplier	Site	Currency	Effective From	Effective To	Requesting Org	Purchasir	Purchasir	Enabled			
9		Hosted						GBP									
10																	
11	Item Section	Action	Line Num	Line Type	Thumbna	Image	Description	Shopping Categor	Category	Supplier Item	Supplier	Internal	Item Revi	Manufact	Manufact	Product S	Unit
12																	

This can be found in the catalogue Bulk Upload Template which is located on the [iSupplier log-in page](#). This template also contains tabs with current valid shopping categories and UOM to be used in uploads:

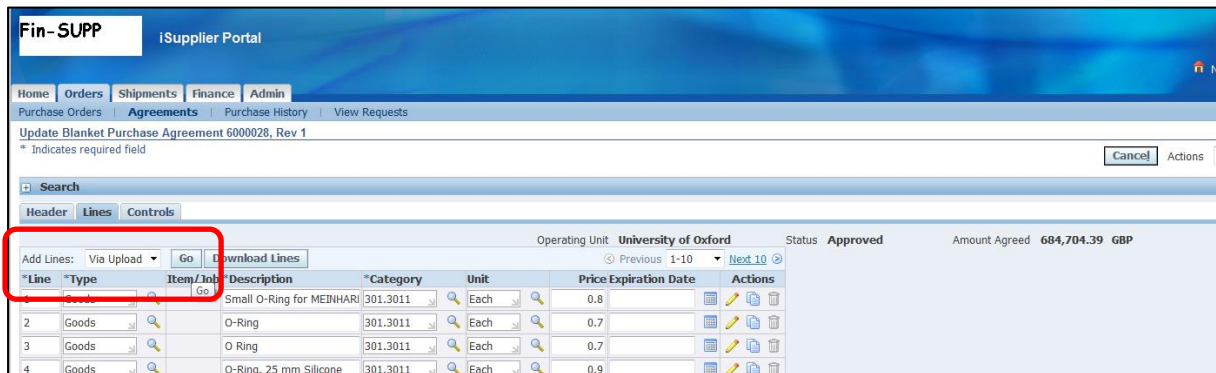
Please remember to use the Export as the basis of your update file, and ensure that you take account of the following:

- Add the Header to the import file.
- Retain the line structure of the file from the export – the system uses the line number and descriptors to identify lines that need updating.
- In the 'Action' column put 'SYNC' for all lines on the file.
- For obsolete lines end-date them in the 'Expiration Date' column in the following format YYYY-MM-DD.
- For new lines, add these at the bottom of the file completing the relevant information in the appropriate fields – the existing lines can be used as a template for this. The system will generate line numbers for these new lines when they are uploaded.
- Please ensure that valid shopping categories have been entered for all new lines (level 4 UNSPSC codes), and a valid 'Unit' has been used – a list of the valid codes can be found on the template.
- Please remove all data from the 'Category' column (ie P-Code) – the system will map these lines to the appropriate P-Code from the Shopping Category you allocate to the item.

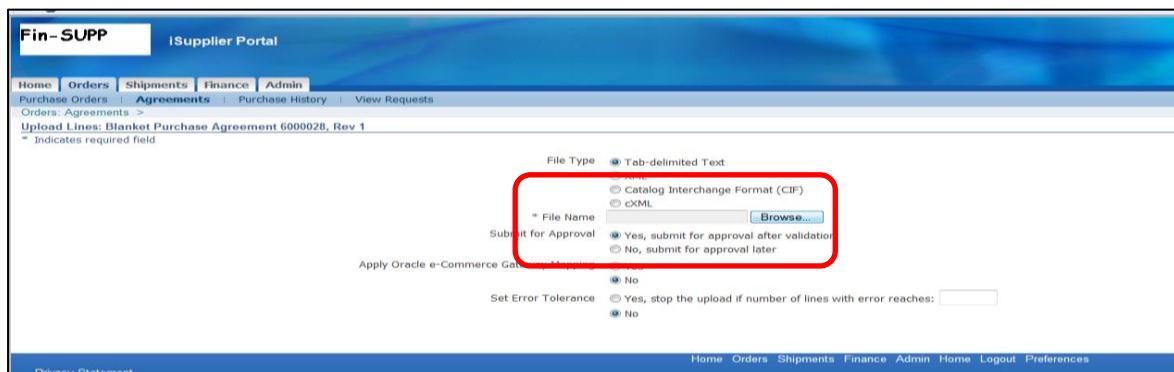
Once the file has been created it will need to be saved as a Text (Tab Delimited) file for the upload.

Uploading your Catalogue

To upload the file select 'Add Lines Via Upload' and 'Go':

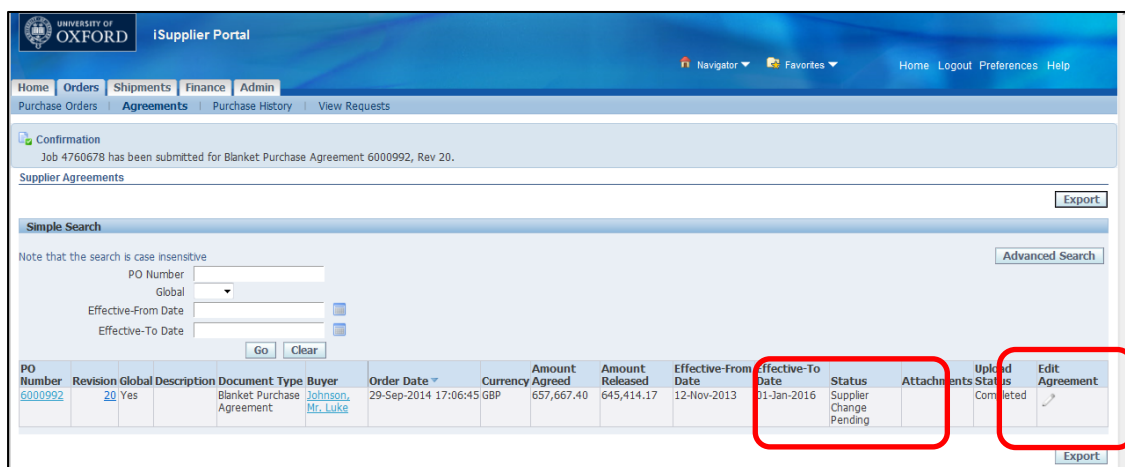


This will navigate you to the upload screen where you can Browse for your saved file:



Attach the file and select 'Submit' – this will import the file into the system where it can be reviewed by the appropriate Category Buyer in Central Purchasing at the University of Oxford.

If the load has been successful the 'Status' should be 'Supplier Change Pending' and the 'Edit Agreement' icon become inactive:



If these conditions are not met the load has failed and you will need to inform [Purchasing](#).