The Global Language of Business

TrueSource Data Pool

Data Source-Specific User Manual

Version 0.50, Draft/Approved, 2016.08.19.

Document Summary

Document Item	Current Value
Document Name	TrueSource – DS-Specific User Manual
Document Date	2016.08.19.
Document Version	0.50
Document Status	Draft/Approved
Document Description	This document describes the Data Source-specific user manual for TrueSource system.

Contributors

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Log of Changes

Release	Date of Change	Changed By	Summary of Change
0.1	30/03/2016	Tibor Gottdank	First Draft
0.2	31/03/2016	Tibor Gottdank	Changes in Chapter 3
0.21	31/03/2016	Tibor Gottdank	Minor changes
0.22	31/03/2016	Tibor Gottdank	Minor changes
0.23	01/04/2016	Tibor Gottdank	Minor changes
0.24	04/04/2016	Tibor Gottdank and Lena Poulsen	Minor changes
0.25	05/04/2016	Tibor Gottdank and Lena Poulsen	Minor changes
0.26	07/04/2016	Tibor Gottdank and Lena Poulsen	Minor changes
0.3	18/04/2016	Tibor Gottdank	More changes within the whole text
0.31	26/04/2016	Tibor Gottdank	Minor changes
0.32	02/05/2016	Tibor Gottdank	Minor changes
0.33	05/05/2016	Tibor Gottdank	Image update
0.34	09/05/2016	Tibor Gottdank and Lena Poulsen	Image update and minor corrections
0.35	09/05/2016	Lena Poulsen	Minor changes
0.4	11/05/2016	Tibor Gottdank	Changes in images and in chapter
0.41	12/05/2016	Tibor Gottdank	Changes in chapter 3
0.42	13/05/2016	Tibor Gottdank	Minor changes
0.43	17/05/2016	Tibor Gottdank	Changes in chapter 3
0.44	23/05/2016	Tibor Gottdank	Changes in document header
0.50	18/08/2016	Tibor Gottdank	Screenshot update

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Table of Contents

1 Introduction

1.1 Purpose of Document

This manual describes the use of TrueSource platform for the Data Source (DS) users[1].

The document structure is divided into the following main sections:

- First section provides general information about the goal of this manual.
- Second section gives detailed description about the usage of user interface
- Third section contains the Appendix with Glossary and List of Figures.

1.2 Document Conventions

This document structure is partially based on the specification standard of Rational Unified Process (RUP) methodology.

The following typographical conventions are used throughout the document:

- `Monospace` type is used to denote programming language, UML, and XML identifiers, as well as for the text of XML documents.
- *Italic* type is used to denote menu name and other names of user interface objects.

This document uses several abbreviations which long forms are located in Appendix.

1.3 Target Audience

The audience of this specification includes all assigned TrueSource subscribers whose role is DS in the GDSN-specific process.

[1] There are two parts of the user manual of TrueSource Data Pool: one manual is for DS users and one manual is for DR users. DR represents the demand side data. It can be a company that receives product information from a DS.

2 Overview

A DR (retailer, hospital, distributor, wholesaler, foodservice operator, group purchasing organization, government etc.) role is in the GDSN process to receive product information from DS.

Every DS-user of a TrueSource platform can use three main functions captured the three main tasks of a DS-user:

- Create/edit/validate/publish product **items**
- Receive and read **messages** sent by DR about you the acceptance of product item
- Receive and read **subscriptions** related to product items

These three main activities are representing by three main navigation menus in the DS-specific user interface TrueSource platform: *Items*, *Messages*, and *Subscriptions* (Fig. 2-1)[2]. Therefore, this user manual organized around these three main menus.

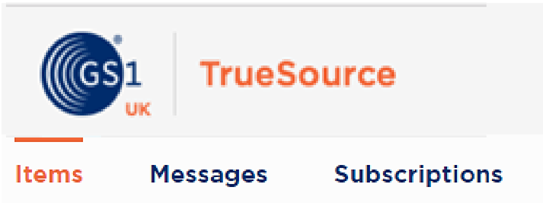


Fig. 2-1

Note: A DS-user of TrueSource platform can be **Editor** or **Viewer** or **Company administrator**. The first two roles are set by the Company administrator or Superadmin, while the Company administrator role is set by the Superadmin. Editor has full access to items, messages and subscriptions. Viewer can view items, messages and subscriptions. Company administrator has full access to items, messages and subscriptions. He/she can view, create and edit DS-company users and edit company information. If you have a company administrator role, then you can use a further function/menu (*User Management*) to manage the users of your company (Fig. 2-2). For more details about the role of a DS company administrator, see section 3.4.2.

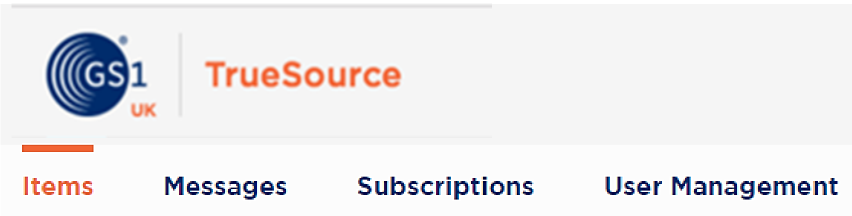


Fig. 2-2

[2] The DR-specific user interface contains the menus Received Items, Subscriptions and Marketplace. If a DR-user has administrator role then you can use the menu Users as well. For more information read the *TrueSource Data Pool – Data Recipient-Specific User Manual*.

Note: Beyond this documentation, you will find another form of information: online *Help* at every place within TrueSource service website where it is necessary. You can access the content of the *Help* by clicking the corresponding *Help* label (Fig. 2-3).

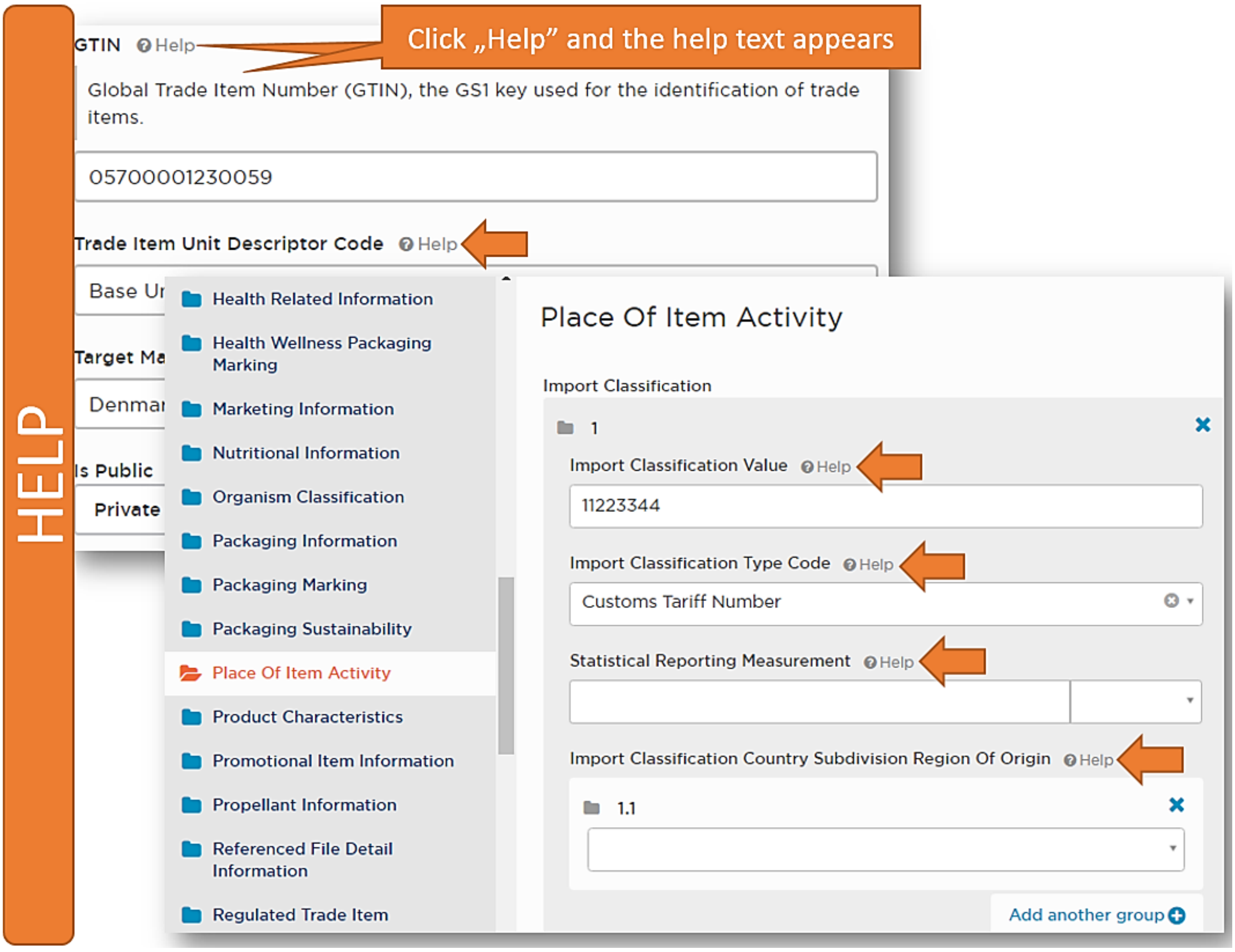


Fig. 2-3

3 Details of User Interface

3.1 Menu Items

The DS-specific user interface has three main functions, but the most important and most essential window is the *Items* window, which you rich after *Log in* and Company type selection (Fig. 3-1).

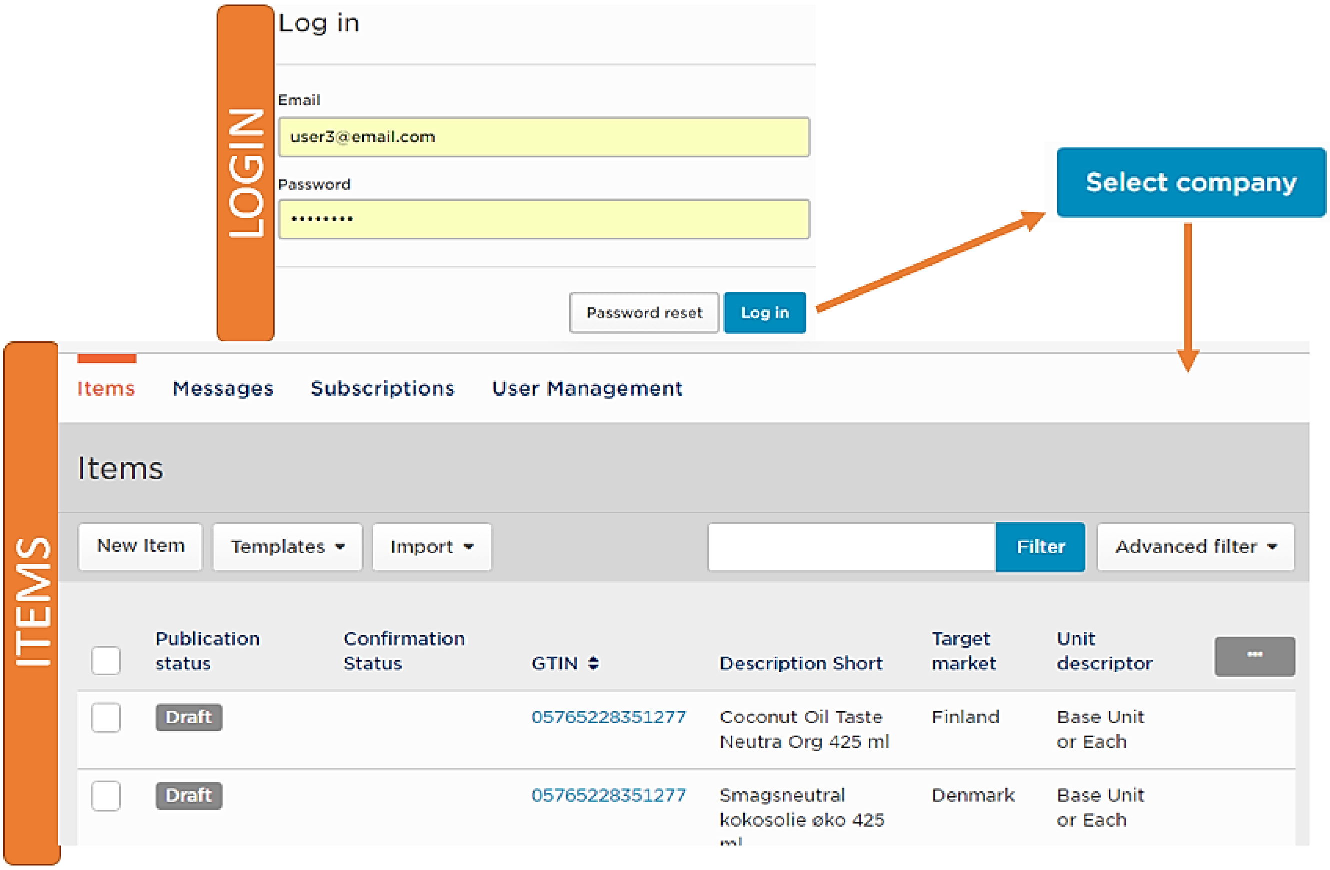


Fig. 3-1

The *Items* list always contains the next six columns (Fig. 3-1) which you can't remove from the list:

- *Publication status*
- *Confirmation status (CIC status)*[3]
- *GTIN*
- *Description Short*
- *Target market*
- *Unit descriptor*

Note: For more information about these properties see next subsections of 3.1

If you need to reset your password for login, then follow the next steps:

[3] The whole list of CIC Statuses see in Appendix.

1. Click *Password reset* button and
2. Enter your email where you will receive instructions from administrator on how to reset your password (Fig. 3-2**Error! Reference source not found.**).

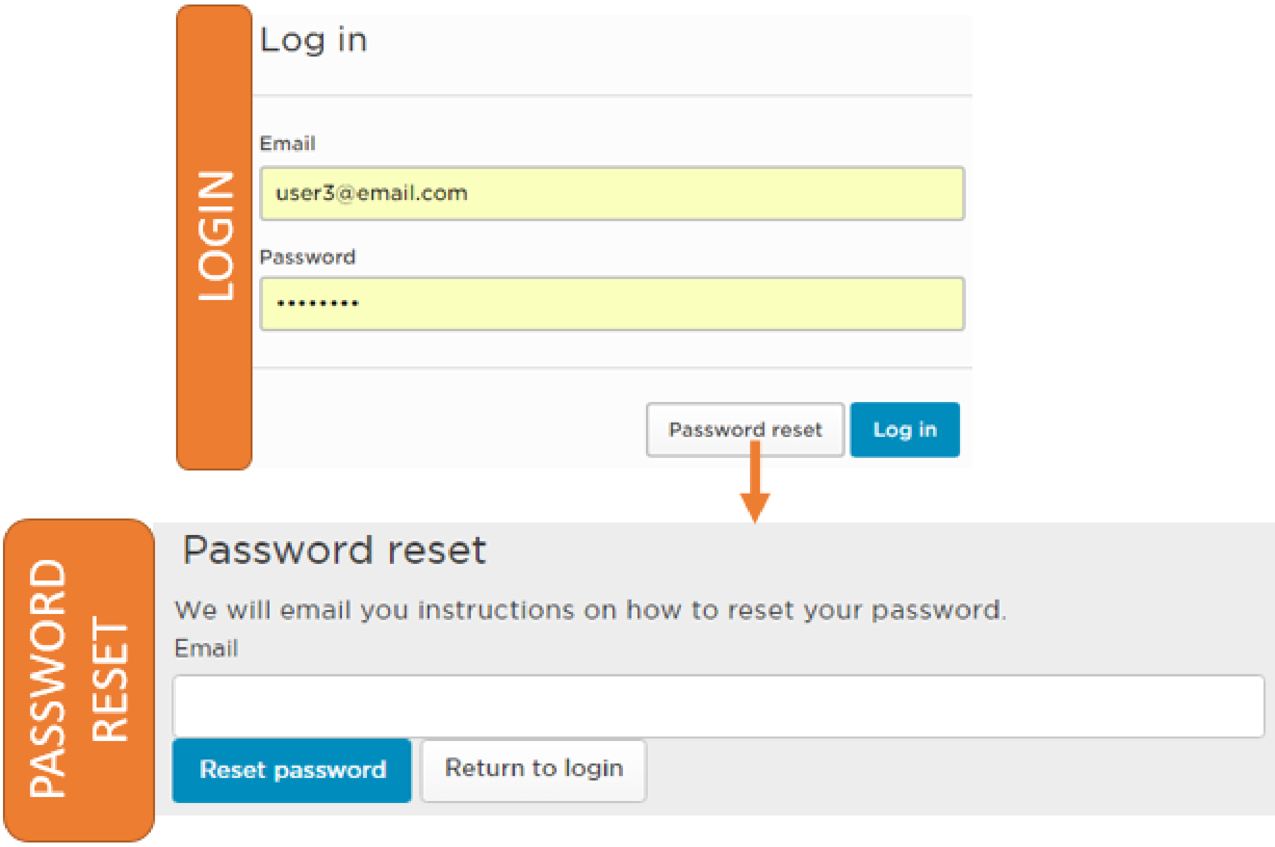


Fig. 3-2

The role of *Templates* is to support and simplify the item creation. You can create a new template to a new item by the *Templates/New template* function or you can use the *Template/New item from template* function if you want to create an item from an available item template.

In the former case you actually create a new item data which can be the draft of other items (Fig. 3-3).

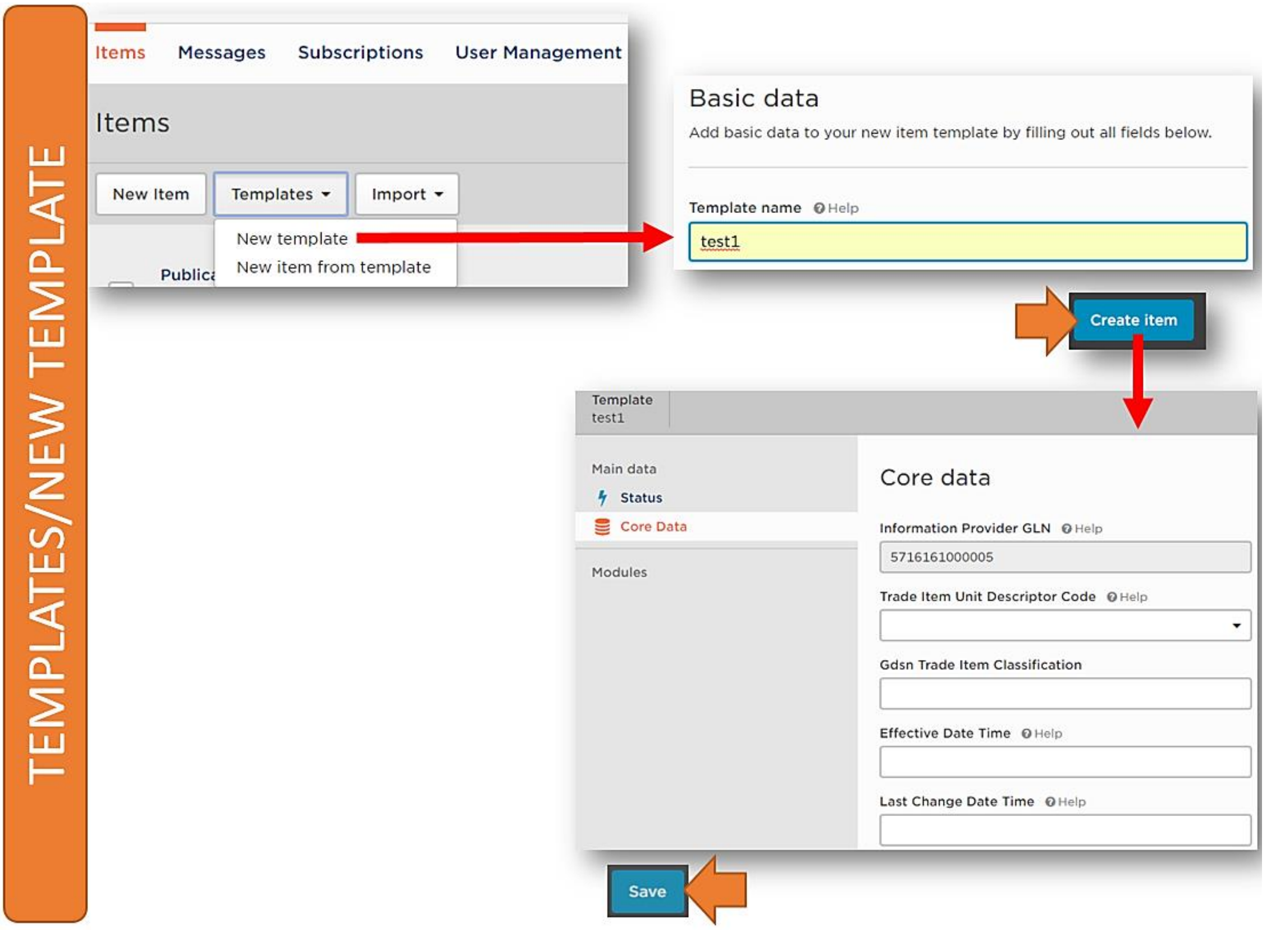


Fig. 3-3

In the latter case you can select a template from an available template list and then you add the necessary item-specific data for template (Fig. 3-4).

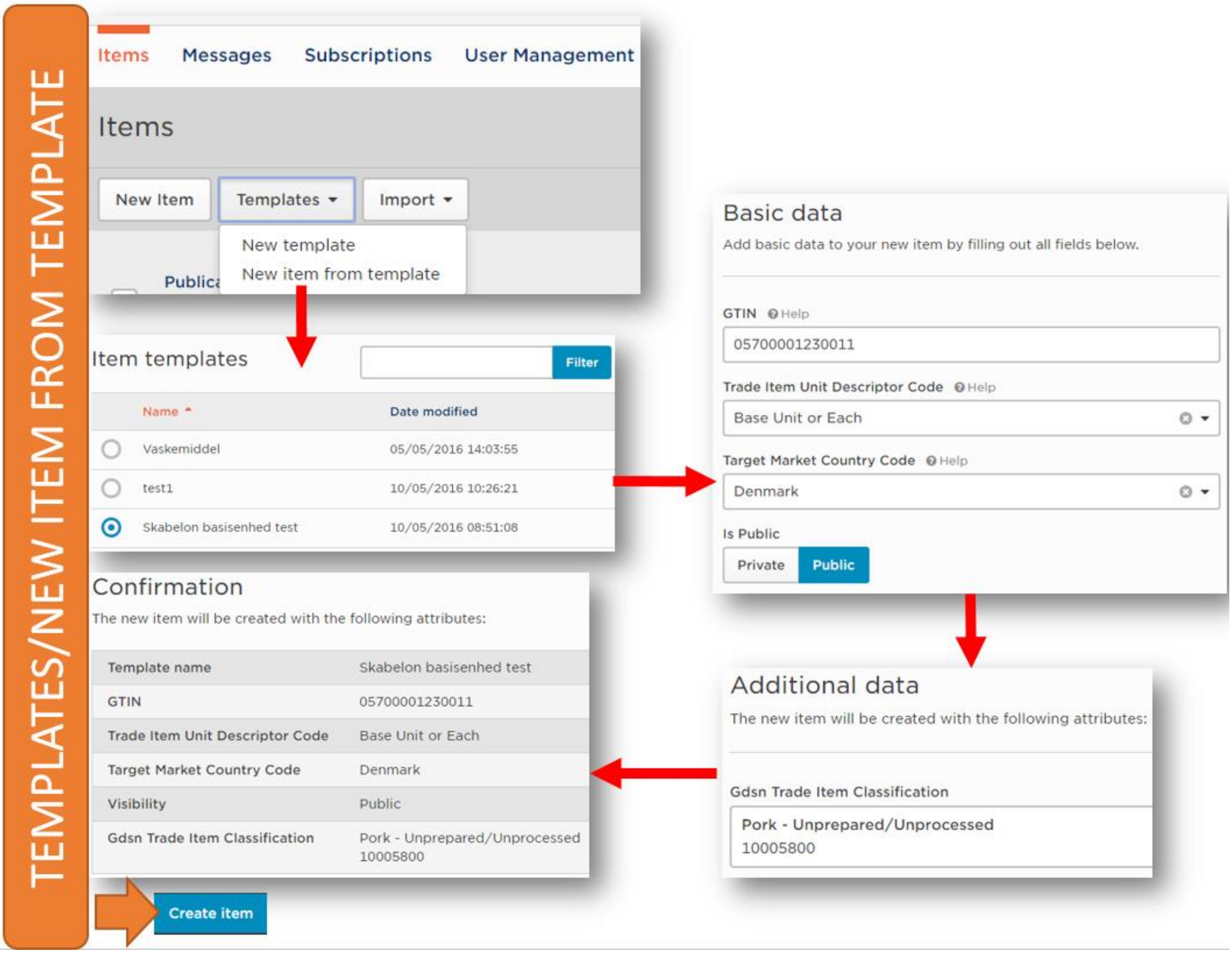


Fig. 3-4

The *Import/Import from Excel* function is to upload item data from Excel file. After file import, a new draft item is created (Fig. 3-5).

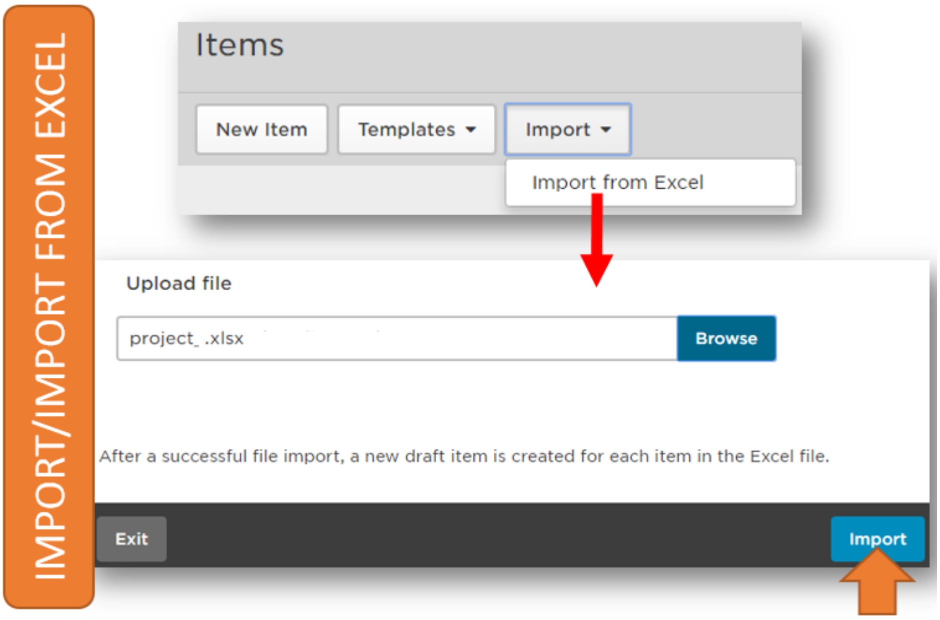


Fig. 3-5

3.1.1 Sort, Filter and Search

In the *Items* window, you will see the ordered list of your created items. Here you can search and sort your items.

You can sort by column displacement (clicking left mouse button) or sorting of column values (clicking the column title). Additionally, you can add further columns (e.g., Functional name, DR, GPC code, date, brand name) to the item table (Fig. 3-6).

Warning: The maximum number of columns to display is 10. The default not changeable columns are coloured grey in the list.

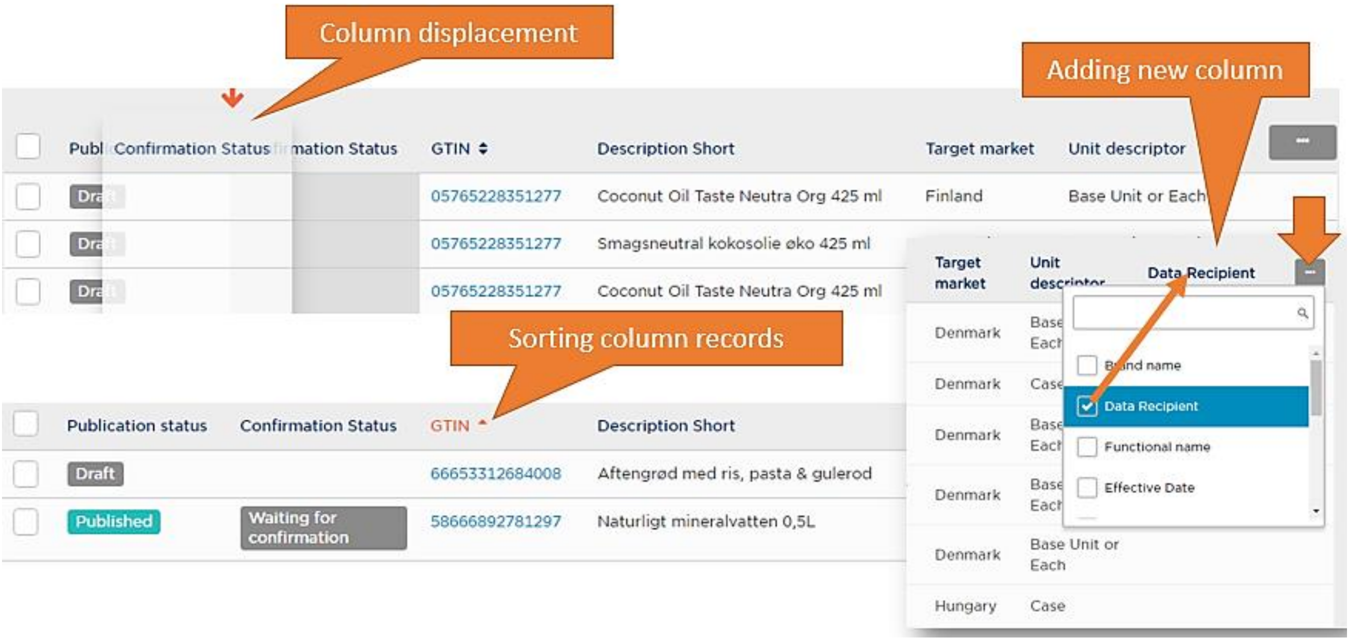


Fig. 3-6

Note: The *Publication status* may have three different values in the Items list: Live (when a child to a parent is published), Draft (when item is already created in a level but not published) and Published.

The search function has two main parts:

- **Simple search** function by the use of a text field: you can search by typing the corresponding text or number (GTIN, description, internal item ID of supplier, brand name or functional name) and then clicking *Filter List* button (Fig. 3-7).

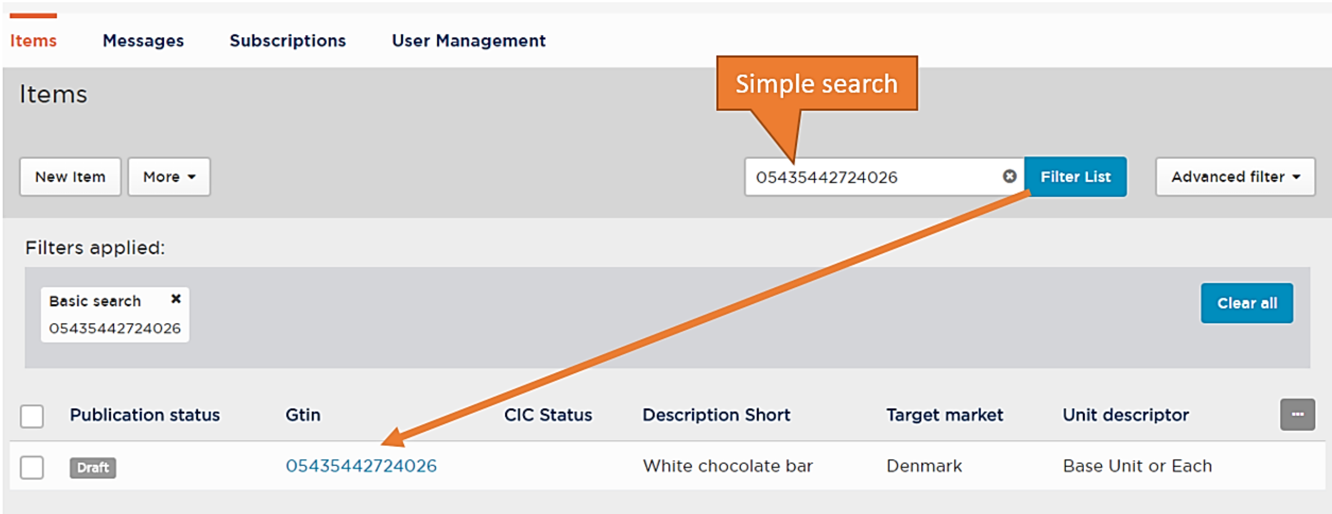


Fig. 3-7

- **Advanced search** function by the use of *Advanced filter* function: you can use multiple conditions (GTIN, description etc.) for searching as well as you can add further filters from the available filter list of *Add a filter* box (Fig. 3-8). Here you can save your filter setting by *Save preset* button or you can use an already saved setting by uploading a setting (*Load preset* button).

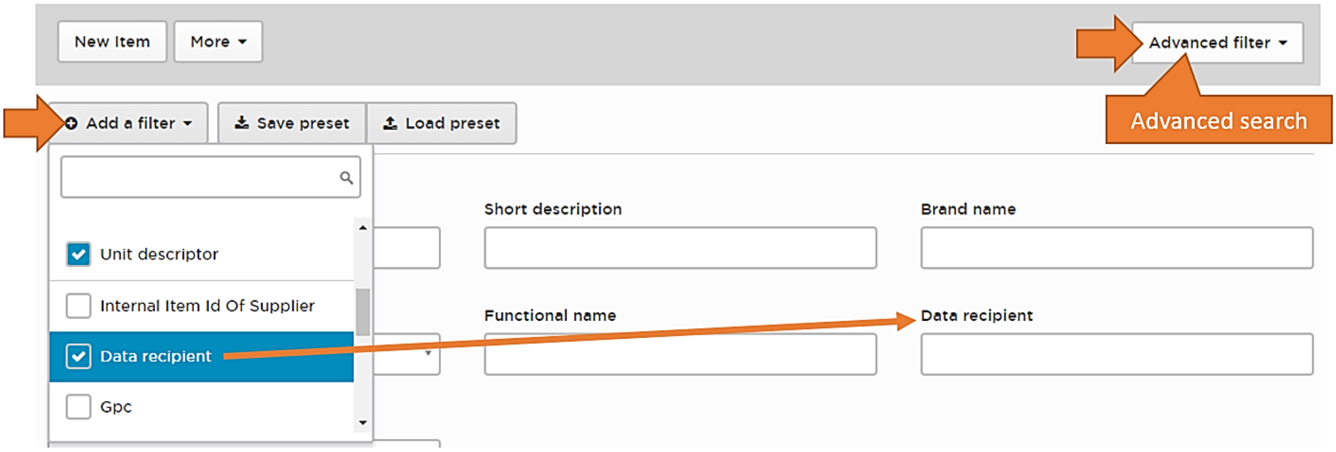


Fig. 3-8

Warning: Always save before leaving a module!

- **Filter saving and loading** (Fig. 3-9): You can save and load filter setting in the *Items* page by the *Save preset* function. Follow the process:
    1. Add name to your setting, set the range of users (only for you/for company). Save your setting.
    2. The *Preset saved* message appears and the new set filter is available from the *Load preset* button.

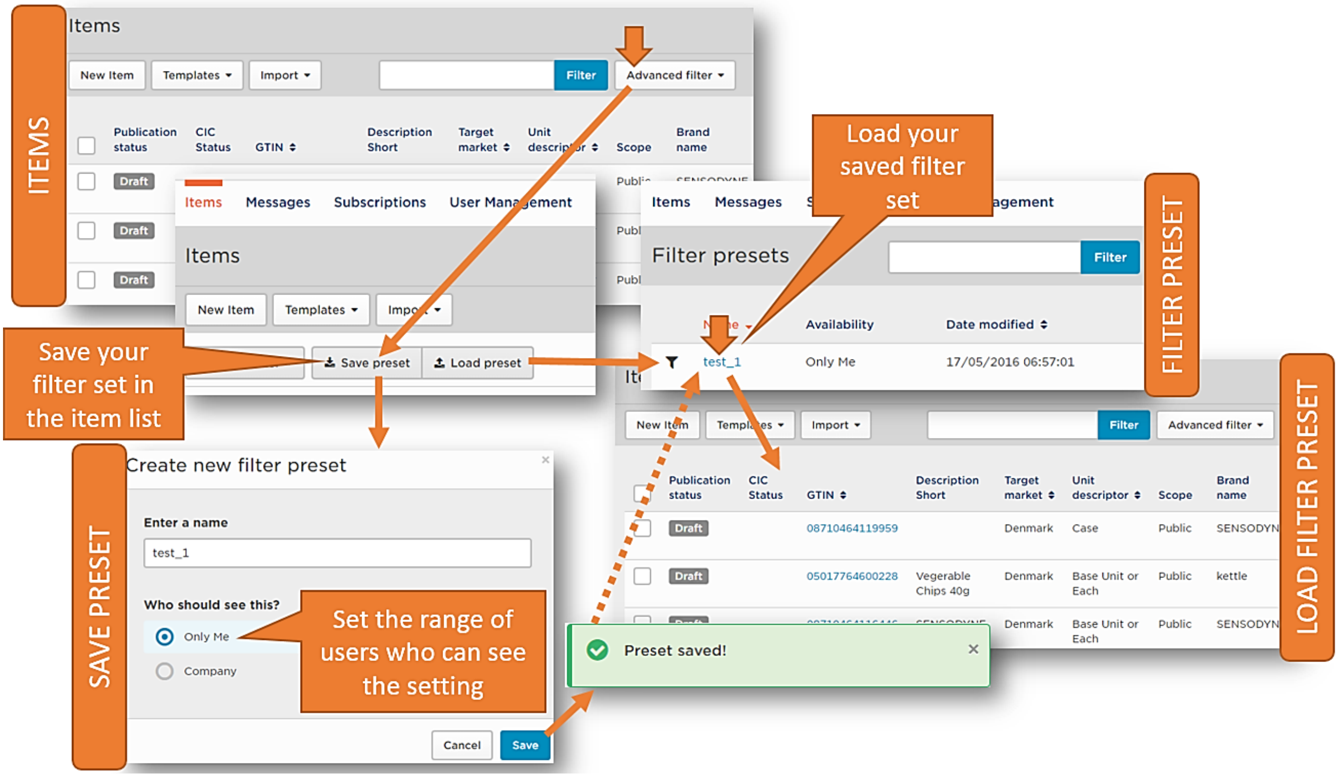


Fig. 3-9

In order to perform operations with more items, select multiple items by marking more check boxes at the beginning of item rows. If you want to select every item from the list, mark the check box at the top of the table (Fig. 3-10).

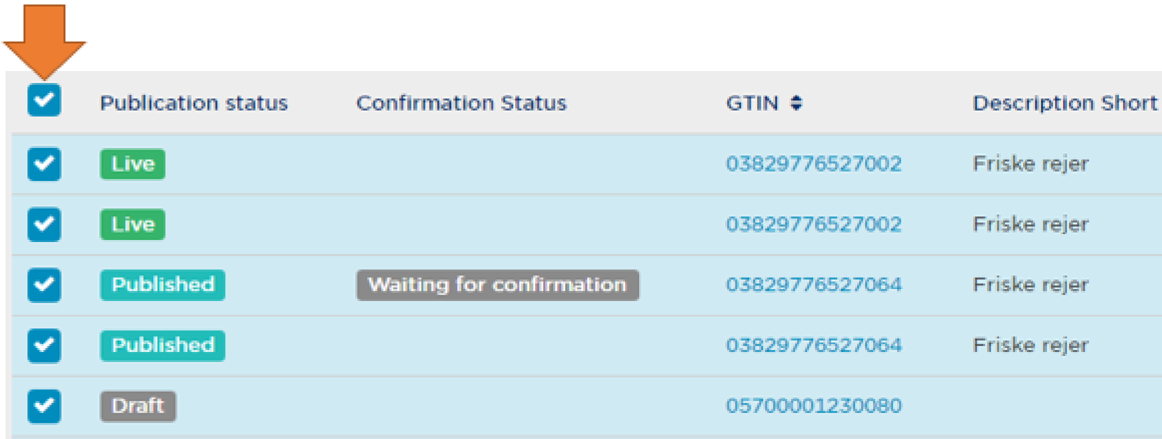


Fig. 3-10

3.1.2 Actions

Additional functions can be accessed by the *Actions* button appearing when you put your mouse arrow at the end of an item row in the *Items* list.

The *Actions* contains the following functions (Fig. 3-11):

- *View* to review the details of the selected item in the *Item Editor* (This option is not available in the case of *Draft* status.)
- *Edit* to edit the selected item data in *Draft* mode in the *Item Editor*
- *Withdraw* to confirm the unpublishing of item data. After clicking *Unpublish* button, the published item will be deleted and its contents will be copied into a newly created draft mode. (The *Delete* option is available instead of *Withdraw* in the case of *Draft* status.)
- *New template from selected:* Template creation from the selected item data.
- Export the selected item data in three different file formats:
  - *Export to Excel*
  - *Export to XML* (This option is not available in the case of *Draft* status.)
  - *Export to PDF*

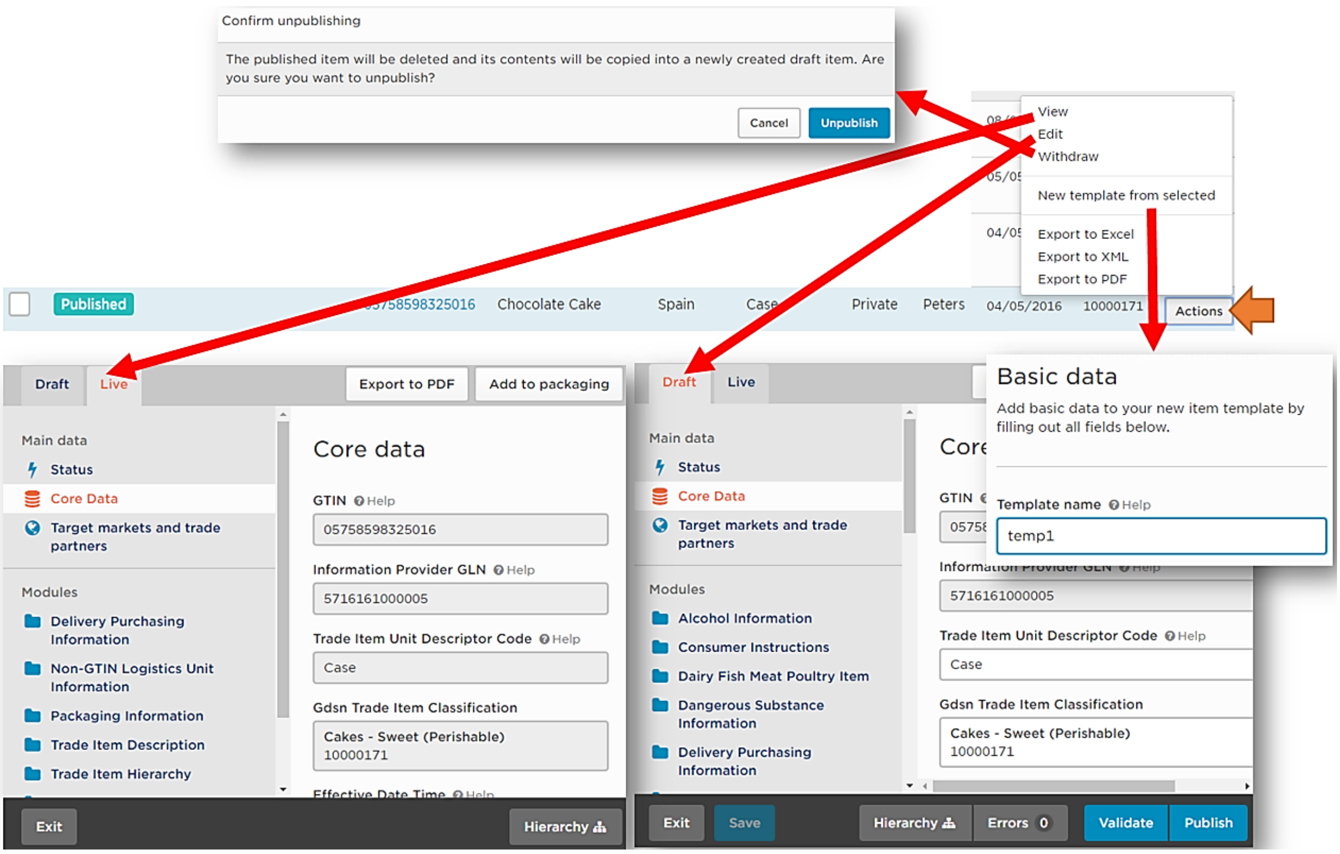


Fig. 3-11

3.1.3 Create Item

One of the most important functions in *Items* window is the item creation.

The item creation process contains the following steps:

1. Click *New Item* button in upper left corner. The *Basic Data* window appears (Fig. 3-12).

   Fill the following:

   - *GTIN* number of your product
   - *Trade Item Unit Descriptor Code* to define the GTIN hierarchy level (the *Base Unit or Each* is the basic level) of your item
   - *Target Market* country of your product
   - *Visibility*: You need to decide the visibility level of your product item:
     - Select *Public* for global visibility – in this case, all DRs can subscribe the product.
     - Select *Private* for only a defined DR – in this case, only the selected DR can subscribe for this product.

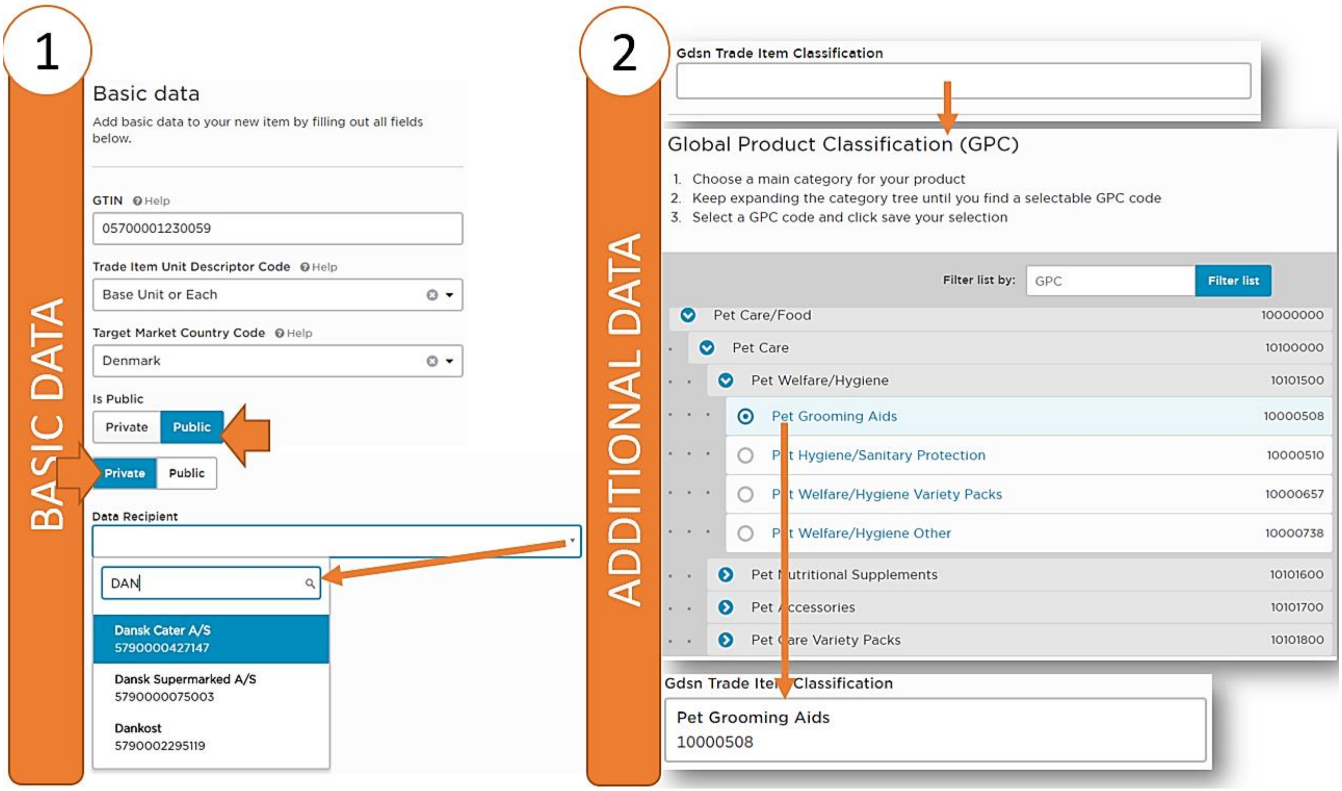


Fig. 3-12

2. Click *Next*. The *Additional Data* window appears. Type GPC number of your item or select it from the hierarchy list. (Every GPC number is within a four-level hierarchy.) Save it (Fig. 3-12).

3. Click *Next*. The *Confirmation* window appears (Fig. 3-13). Here you get a summary about your defined item.

Note: At this point, the item is not yet created. Click *Create* button for actual item creation or go *Back* if you want to change something.

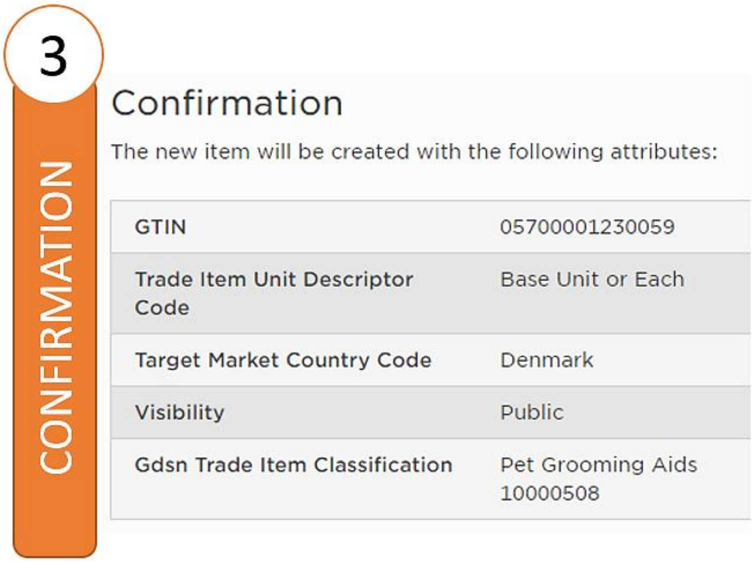


Fig. 3-13

4. Click *Create*. The *Item Editor* window appears (Fig. 3-14) in *Draft* mode. Here you find every information about your created item. At the upper side of the page, you will find details about GTIN hierarchy level (e.g., *Base Unit or Each*), target market (e.g., *Denmark*), the item visibility from the trade partner (e.g., *Public*), Description Short (e.g. *Friske rejer*), Internal Item ID Of Supplier (e.g. *12345X*) and the status of GS1 Trade Exact (e.g. *Not inspected*).

   The left side of the page shows the submenus of the *Main data* menu: *Status*, *Core Data* and *Target markets and trade partners*. When you select one submenu from the left, the details related to the selected submenu appears in the right side.

   The use of the *Modules* menu helps you to find item information easier, if created item is too complex to view in one (in this case the created item is a base item with simple structure thus the *Modules* menu is empty). The modules contain categorized information of an item (e.g., information about certification, packaging, delivery, marketing etc.). You can add additional data to your item by *Modules* as well.

Warning: Always save before leaving a module!

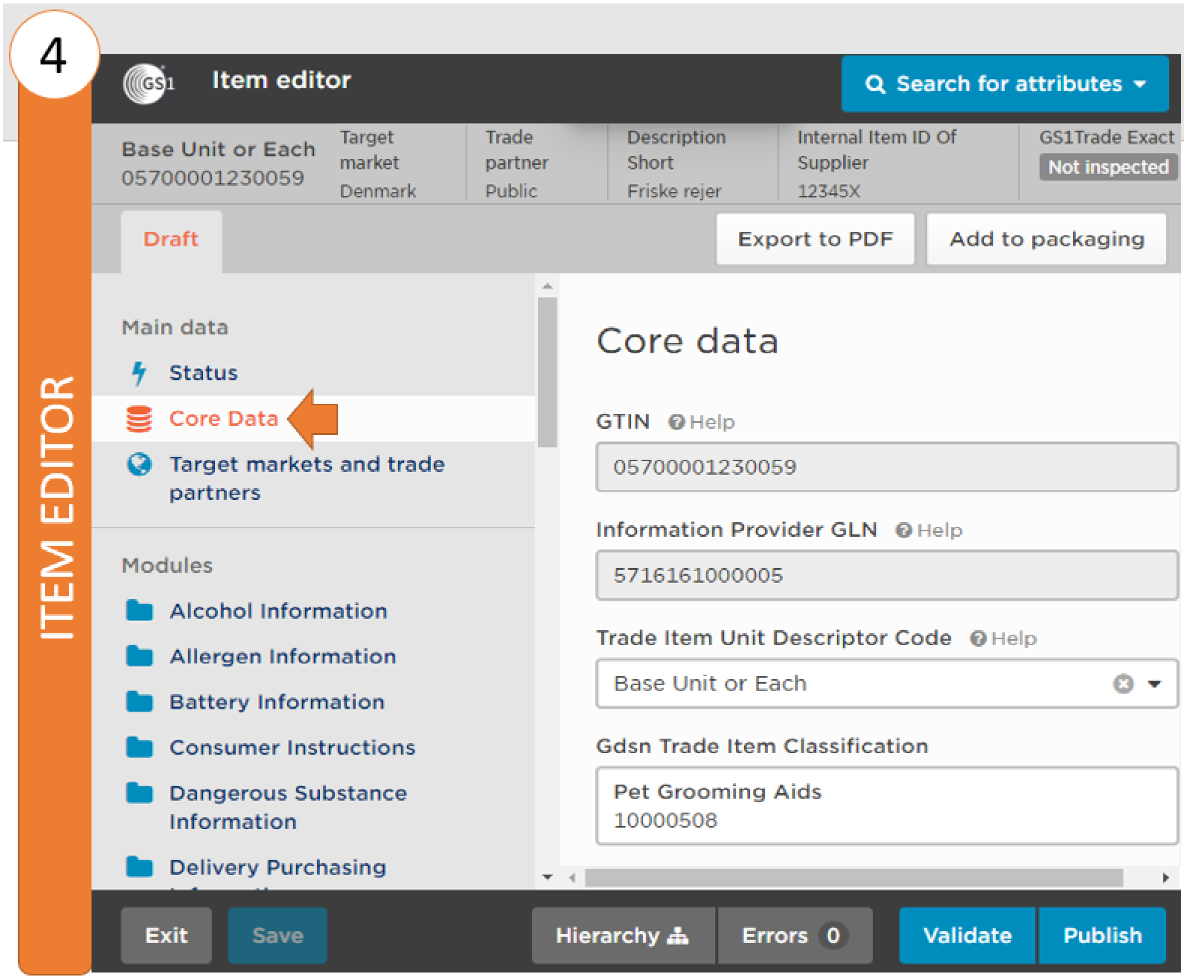


Fig. 3-14

5. When all data are set properly, click the *Validate* button to validate your created item (otherwise, you can change item data or you can exit by *Exit* button). If you don't have any errors after clicking *Validation* (in this case, the label of *Error* button shows a "0" on bottom right) the validation is successful. You get a message about that (Fig. 3-15).

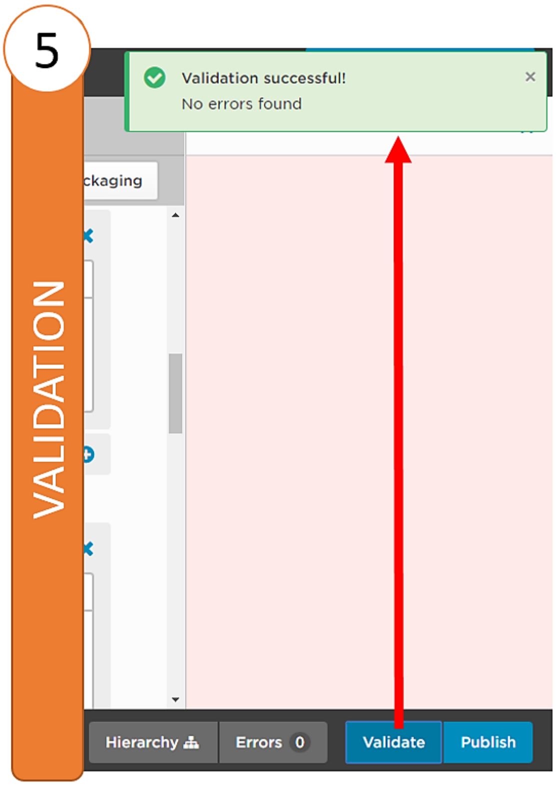


Fig. 3-15

Note: If you get some errors after clicking *Validation*, click *Error* button and the error messages appears on the right side. If you select an error item from the right, then you find the exact place within item data – marked by red colour – where you need to correct (Fig. 3-16).

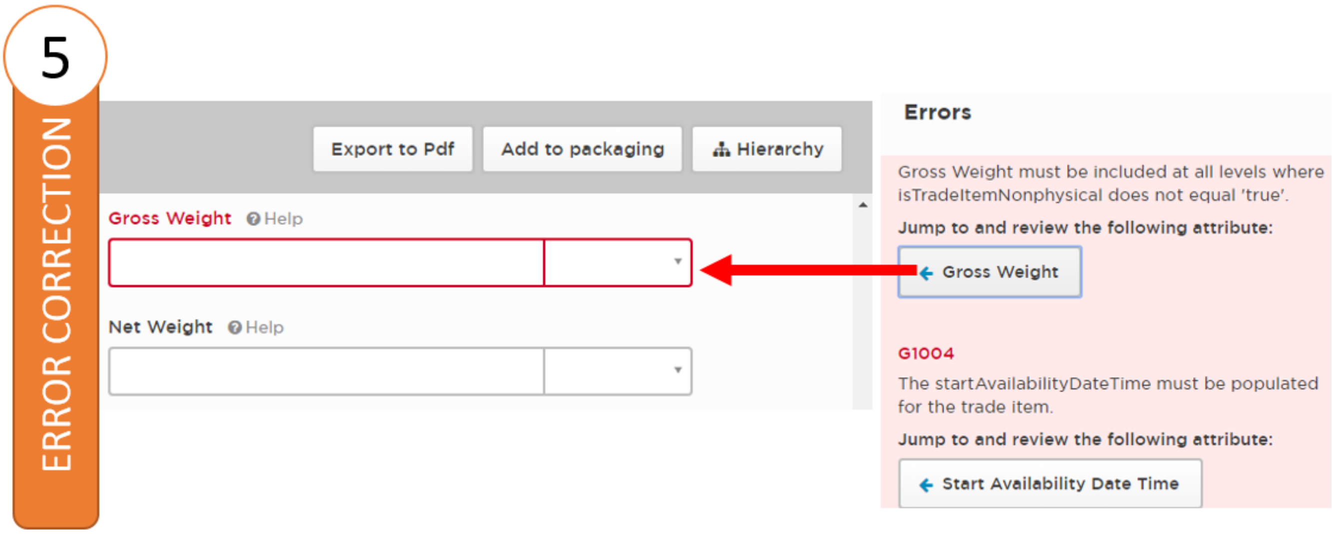


Fig. 3-16

6. Final step is to publish your item (Fig. 3-17): Click *Publish* button, the publishing item data together with hierarchy information appears. Click *Publish* button again (or click *Exit without saving* to jump from publishing process). The publishing process is finished and the new *Published* item will appear in the *Items* list.

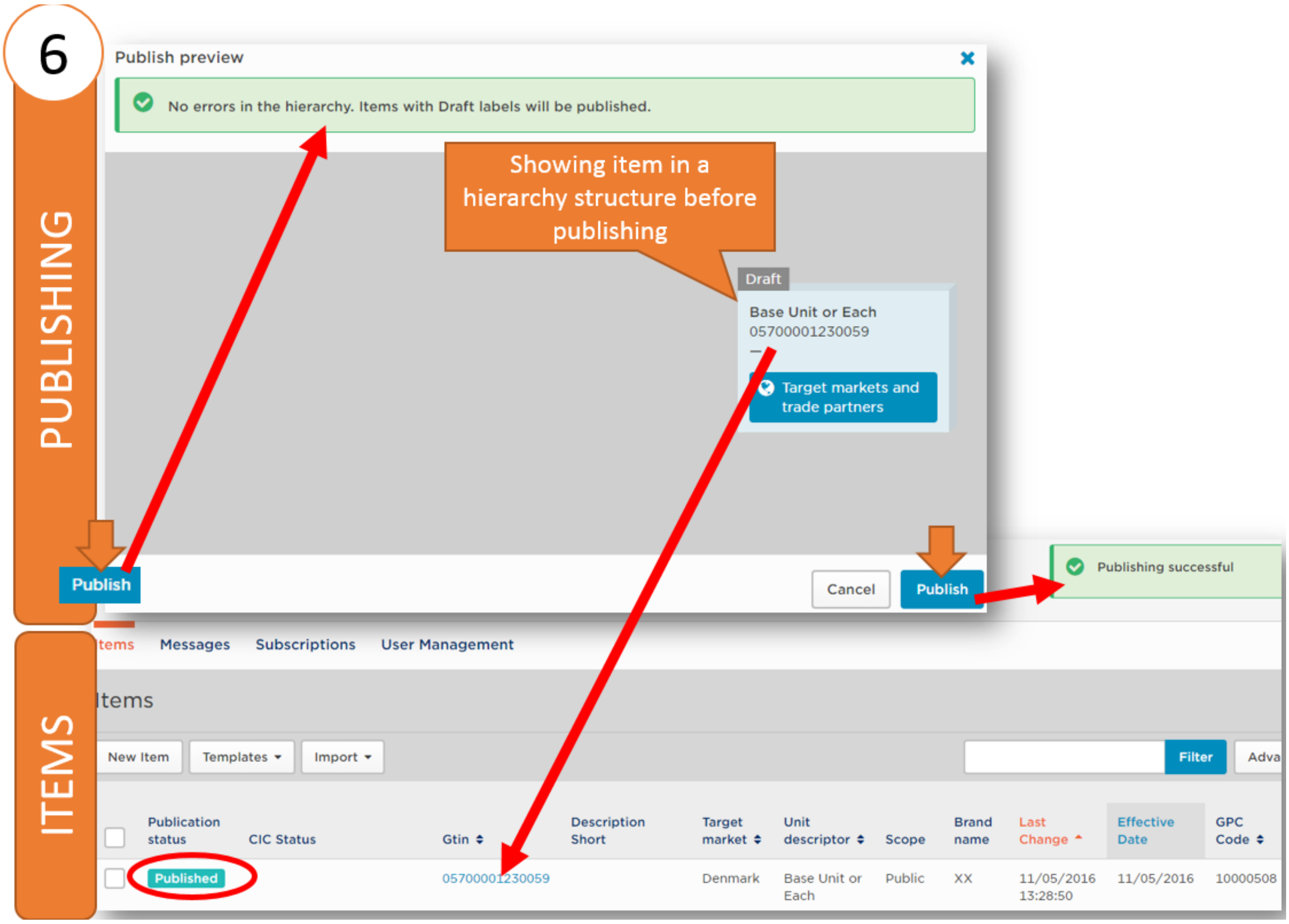


Fig. 3-17

Note: For more functions of *Item Editor* see 0.

3.1.4 Edit Item

If you need to change your item open *Item Editor*. Select your item by clicking the GTIN value of item in *Items* window and the *Core Data* page of *Item Editor* appears (Fig. 3-18).

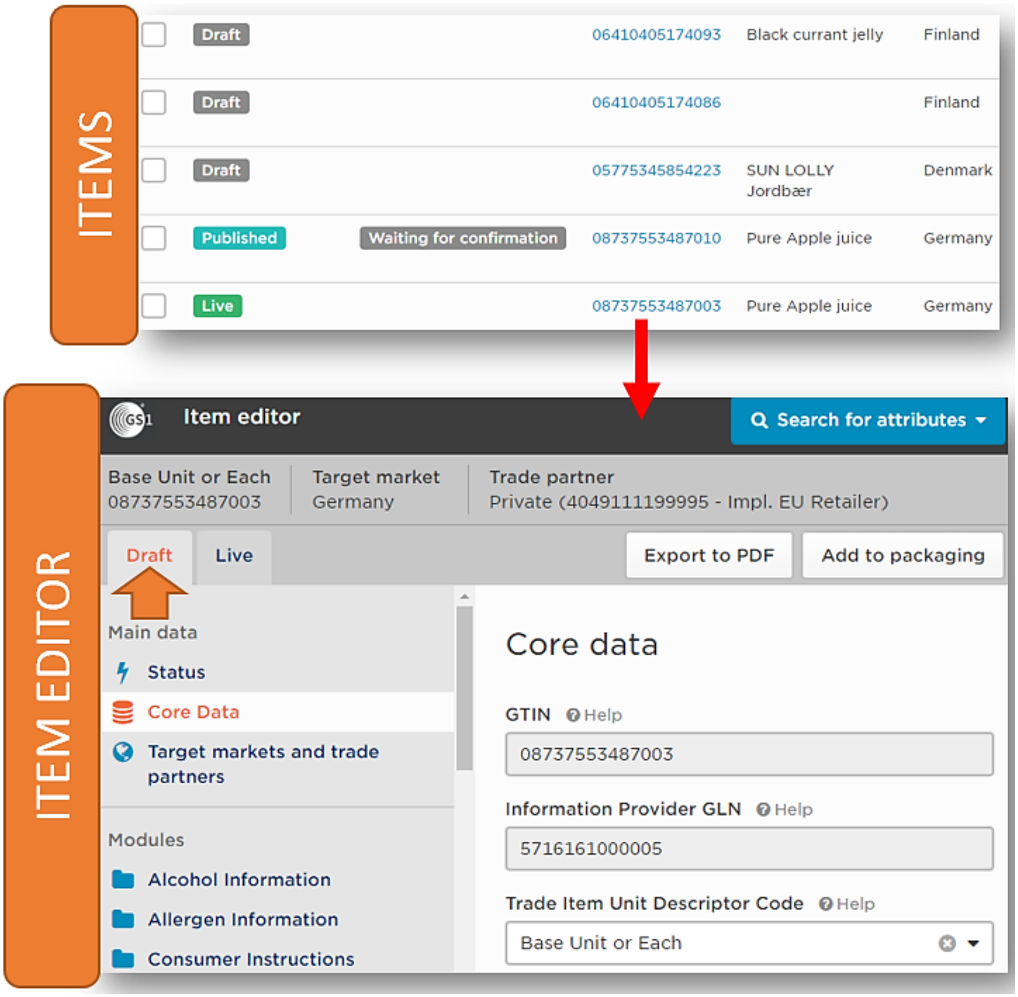


Fig. 3-18

Note: You can only edit item data in *Draft* mode.

The following information you find and the following operations you can perform in *Item Editor (*Fig. 3-19 and Fig. 3-20*)*:

- **Information about *Current item***: The defined *Trade Item Unit Descriptor Code* for setting GTIN hierarchy level (Base Unit or Each defines the base level of hierarchy).
- **Information about *Core data* of current item:** The defined data with GTIN, GLN, GCP numbers as well as hierarchy level (*Trade Item Unit Descriptor Code*).
- **Information about *Target markets and trade partners*:** You can add/change trade partner related to your item by clicking *Add trade partner* button (Fig. 3-19). As mentioned, you can set the visibility (public or private) of your item by this function. You can also add/change target market (a country) by clicking *Add target market* button (Fig. 3-19).

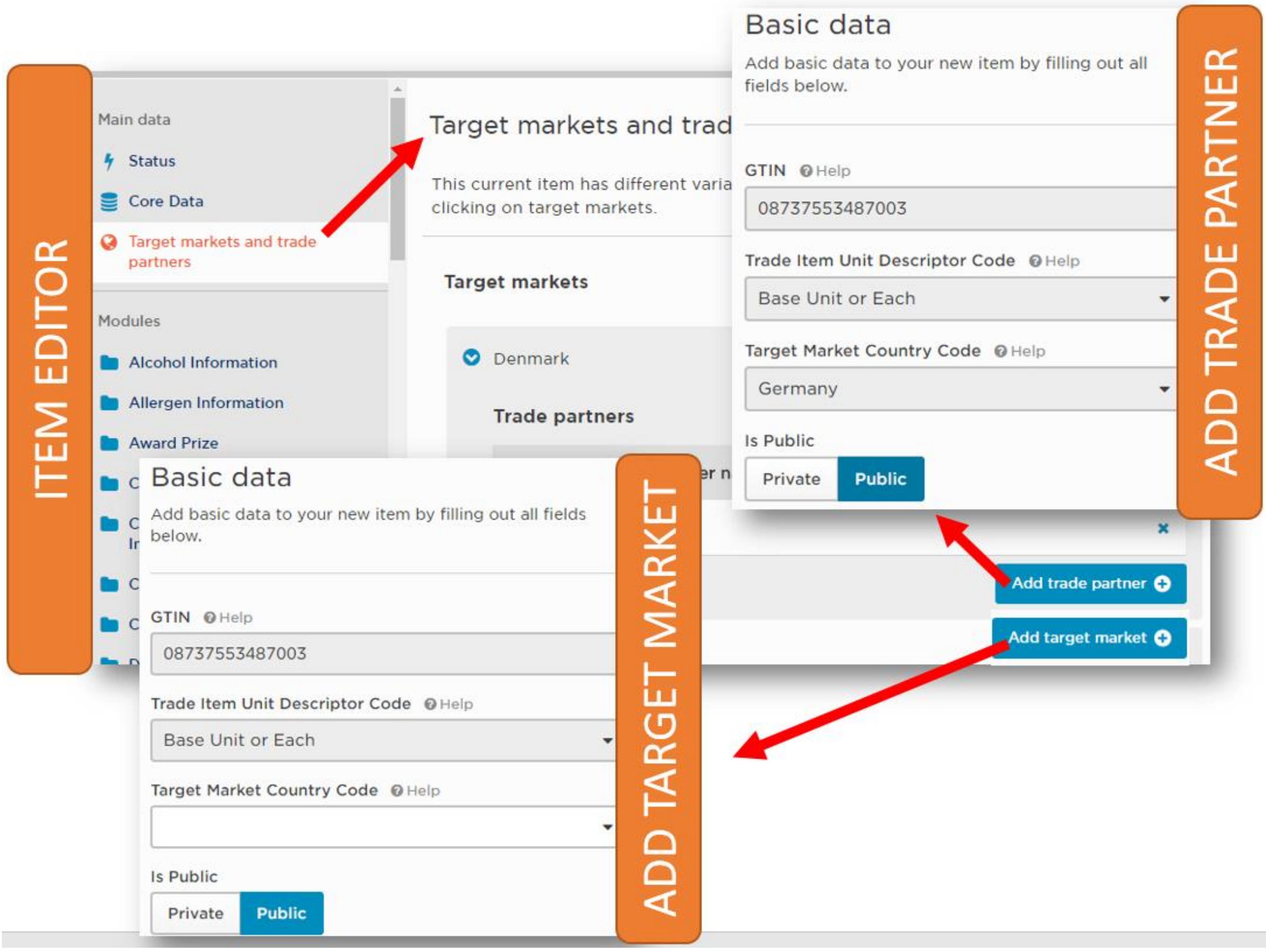


Fig. 3-19

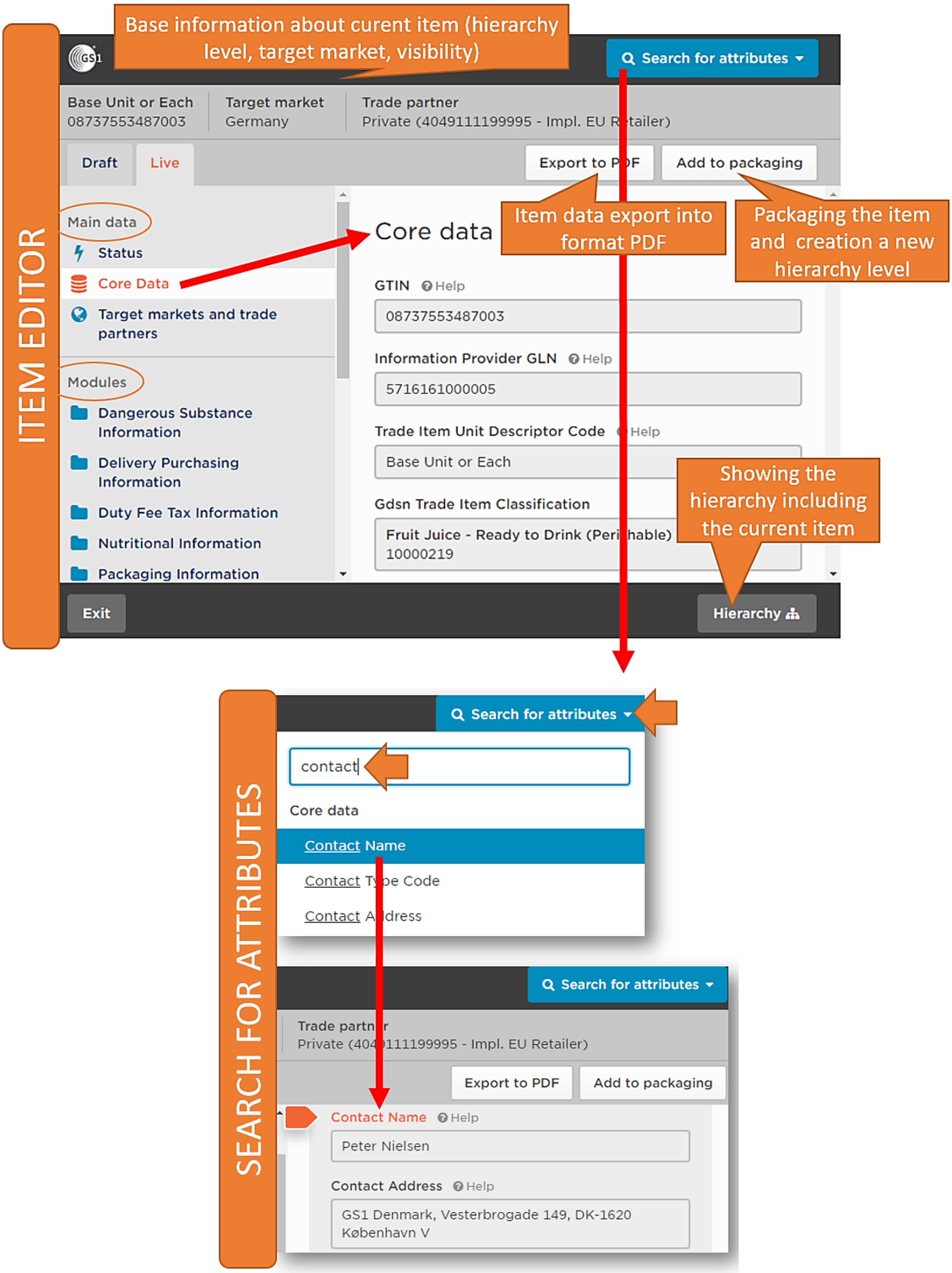


Fig. 3-20

- **Export item data:** You can export your item data into a PDF file by clicking *Export to Pdf* button (Fig. 3-20).
- **Search for attributes:** In order to simple search of an item in the *Item Editor*, you can use the *Search for attributes* function in the in upper right corner of the page (Fig. 3-20).

- **Information categorized by *Modules*:** Every piece of item information is organized into specific *Modules* for easier navigation and simpler searching. You can add further information and useful description by the use of *Modules* as well (Fig. 3-21).

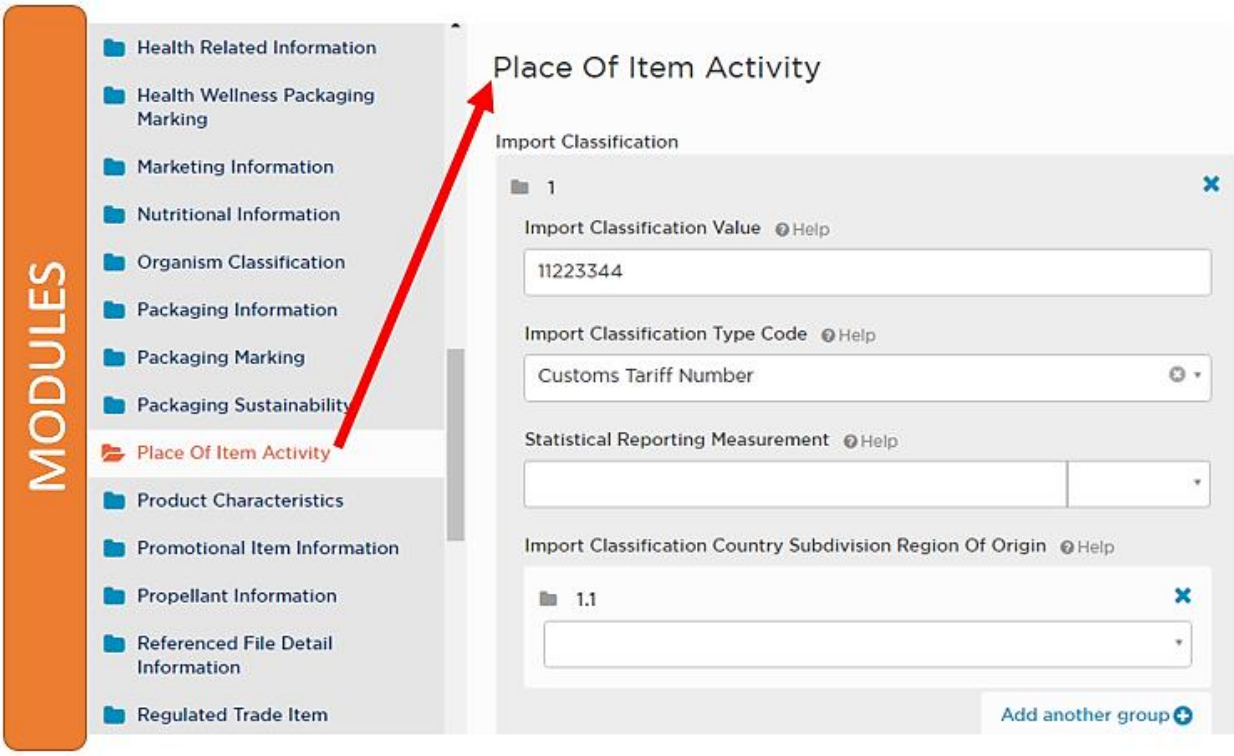


Fig. 3-21

- **Adding a new top level to hierarchy:** You can use *Add to packaging* button to add a new top level to your hierarchy that means a new packaging level. In this case you need to add a new basic item data (with GTIN, Trade Item Unit Descriptor Code and visibility data) capturing the current item as a new hierarchy level. (Fig. 3-22 demonstrates the process of level adding to hierarchy – in this example the *Case*-type item is added *to* the *Base Unit*-type item in the hierarchy.

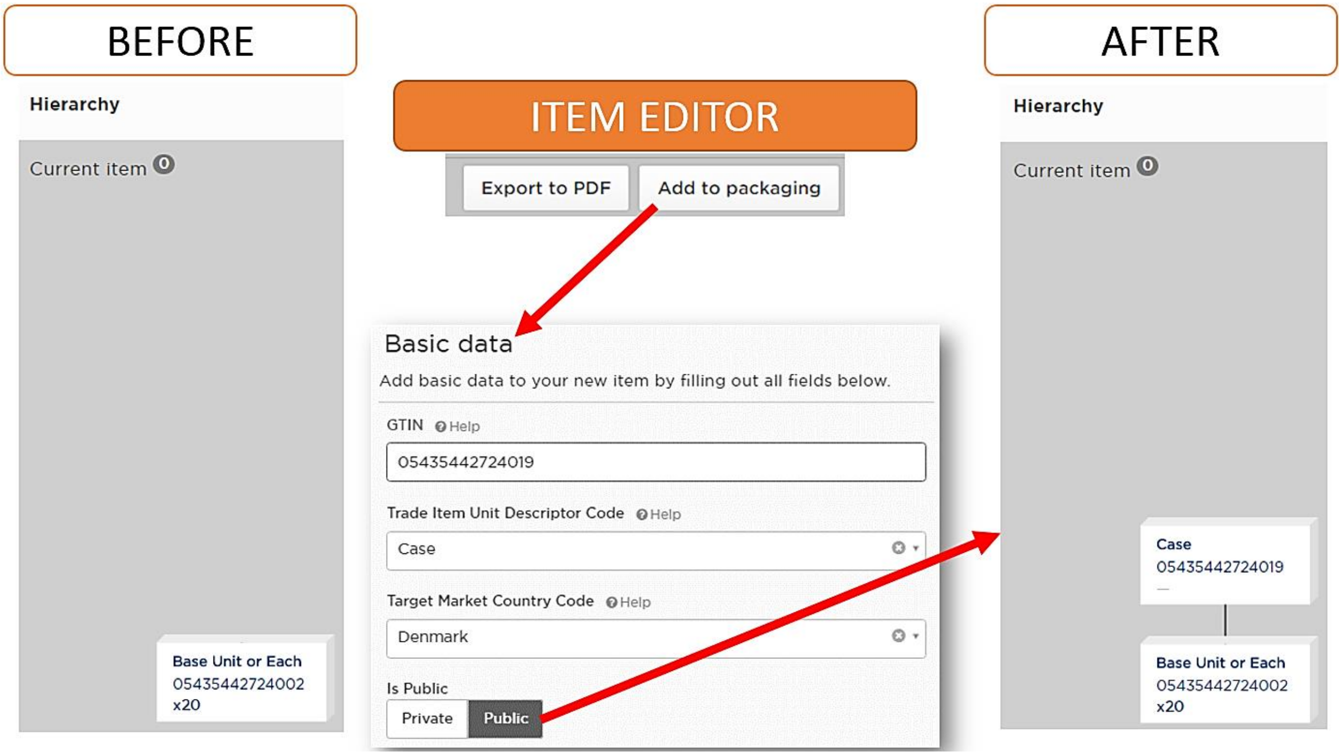


Fig. 3-22

- **Information about *Hierarchy***: You can get a picture about GTIN levels related to your item and about the exact place of your item within this hierarchy by clicking *Hierarchy* button (Fig. 3-23). The top level item data you find in *Item Editor* page but if you want to access the data of other lower levels – which represents other item packaging levels – select the corresponding code from the hierarchy tree.

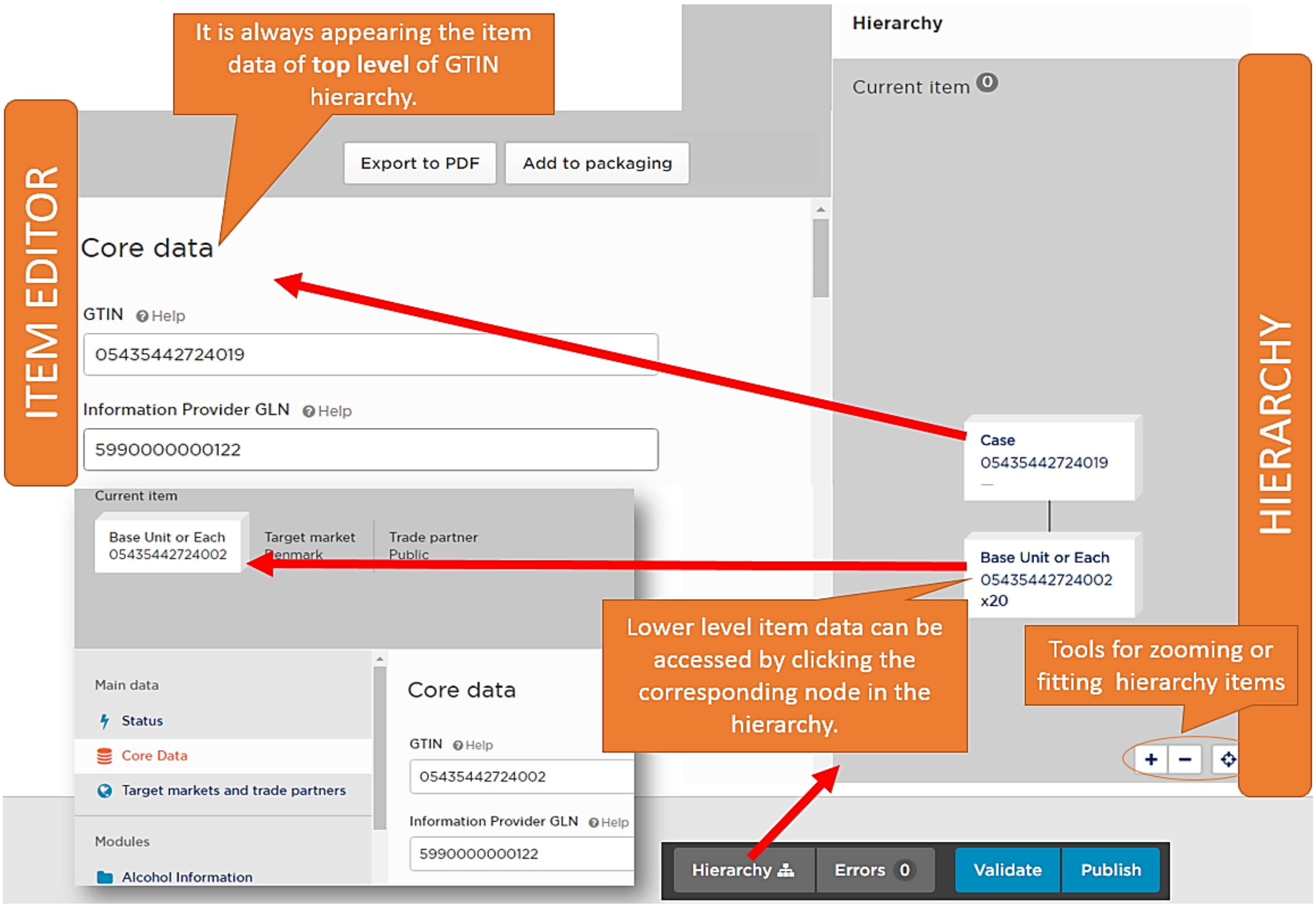


Fig. 3-23

- **Exit/Save/Validate/Publish:** Use the buttons in the toolbar to save your items (Fig. 3-24), you can save your item settings (*Save* button), exit from Item Editor (*Exit* button) or validate your item (*Validate* button). You need to get a "0" in the label of *Error* button after clicking *Validate* (otherwise correct data errors or fill empty fields). Finally, use *Publish* button to publish your item data for defined customers (for public or for a defined DR). After publishing, the new published item appears in the first row of your *Items* list with the value *Published* in the *Publication status* column.

Fig. 3-24

- **Setting status dates**: You can set the *Cancel Date Time* and *Discontinue Date Time* in the *Main data/Status* submenu (Fig. 3-25). *Cancel Date Time* is used for items which have never nor will ever be manufactured. *Discontinue Date Time* is equal to the last production expiry date of a trade item.

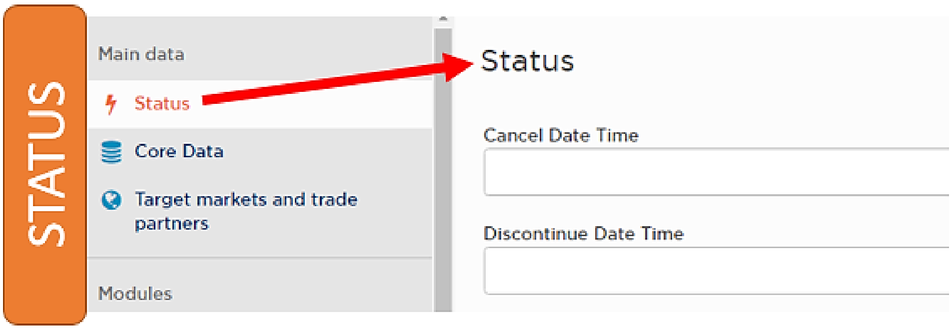


Fig. 3-25

3.2 Menu Messages

You can read the messages received from DR in the *Messages* window, which you can reach by selecting menu *Messages* (Fig. 3-26).

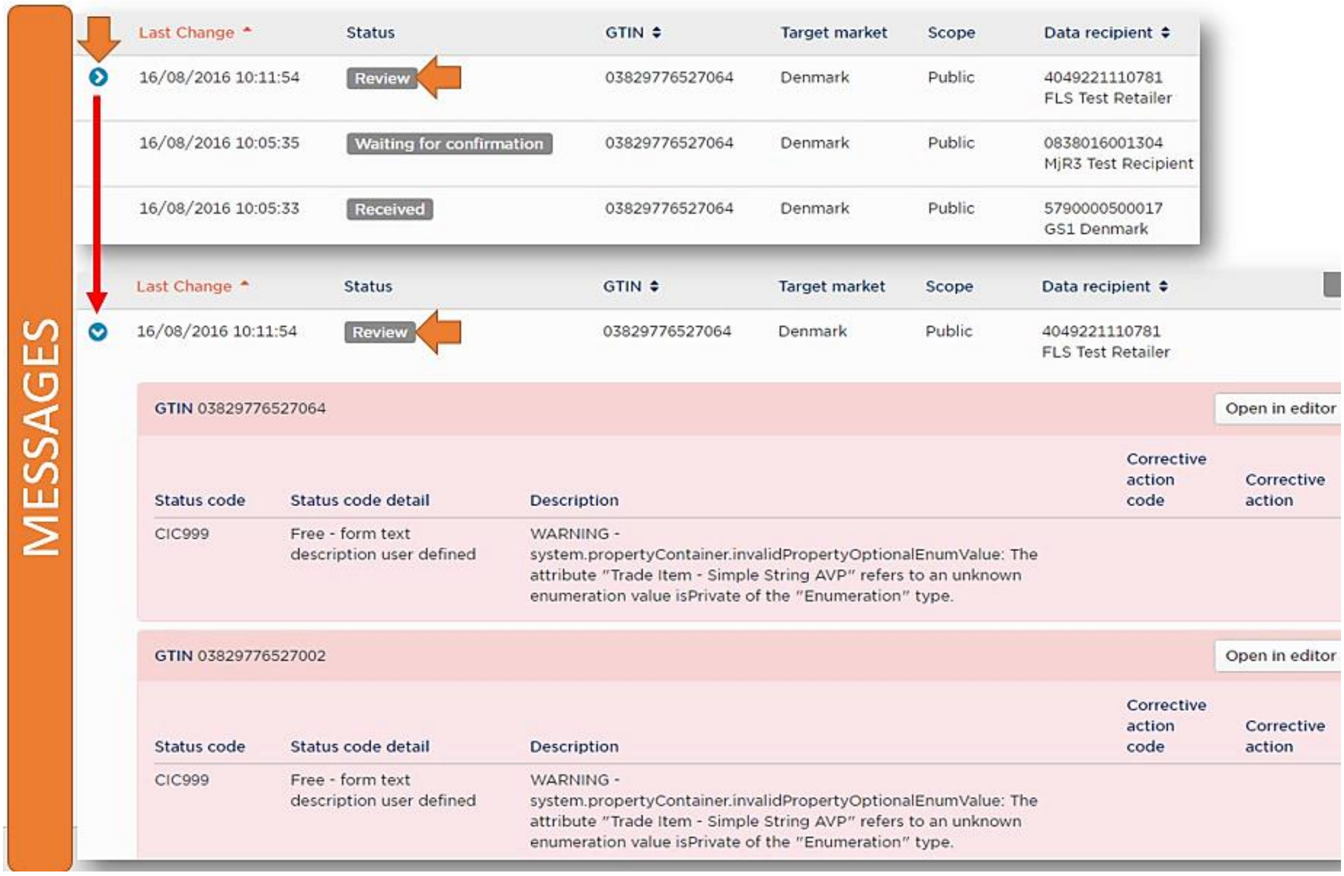


Fig. 3-26

Messages window contains all relevant information about acceptance of your published item. Every message has the following values:

- *Last Change* of received message
- The acceptance *Status*[4] of your published item - there are five different statuses:
    - *Received*: Data has been received by the DR but no business decision has been made on the data.
    - *Waiting for confirmation (Pending)*: Waiting for confirmation in accordance to your published item.
    - *Rejected*: Data will no longer be synchronised or updates will no longer be provided.
    - *Synchronised*: Data are integrated and added to the synchronisation list.
    - *Review*: The DR has received discrepant data without synchronisation.
- *GTIN* value of item: It identifies your item related to message.
- *Target market*: Target market of your item
- *Scope* of the item (*Public* or *Private*)
- GLN number of *Data recipient*

You can access further information about your item confirmation status. This information can be accessed by clicking on where this icon is available. This additional information contains the (CIC)

[4] The status name is corresponding to the GDSN standard.

Status code, Status code detail, Description and *Corrective action code* and *action* description to clarify the current state of confirmation. You can read this information not only in *Messages* list but in an editor by clicking *Open in editor* button.

The messages are searchable and filterable by the same way as in *Items* window.

The *Messages* list can be sorted by date (date of *Last Change*).

Warning: You can't edit messages and you can't answer messages in *Messages* window. *Messages* menu is only for reading messages.

3.3 Menu Subscriptions

The *Subscriptions* menu – in the case of DS-user – provides a list of items subscribed by the DR. When you select an item from the list by clicking the corresponding GTIN of an item, you get the subscription(s) related to the selected item (Fig. 3-27).

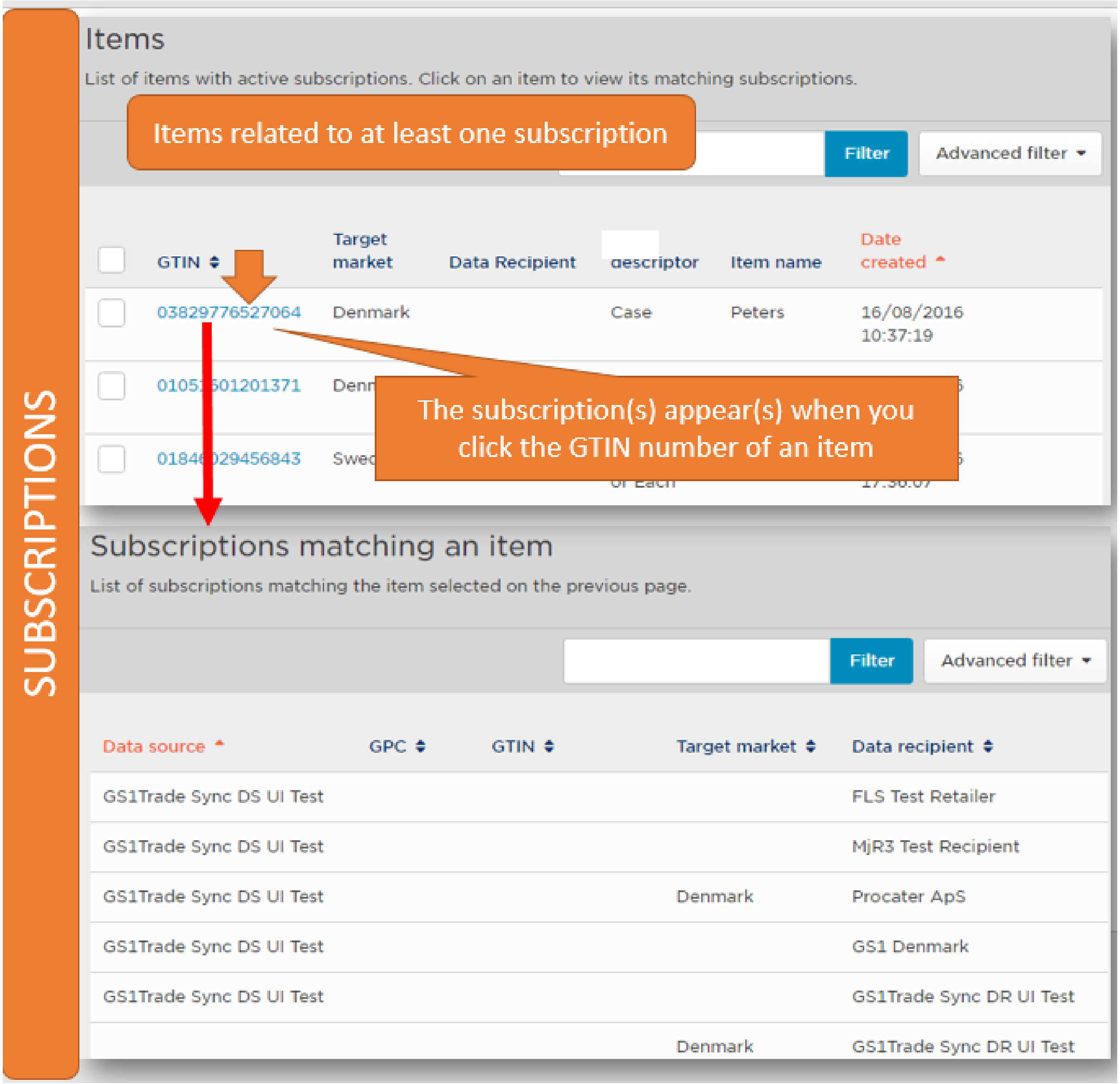


Fig. 3-27

You can use the *Actions* button in the case of *Subscriptions* as well (Fig. 3-28). You can view subscriptions and export in various file formats.

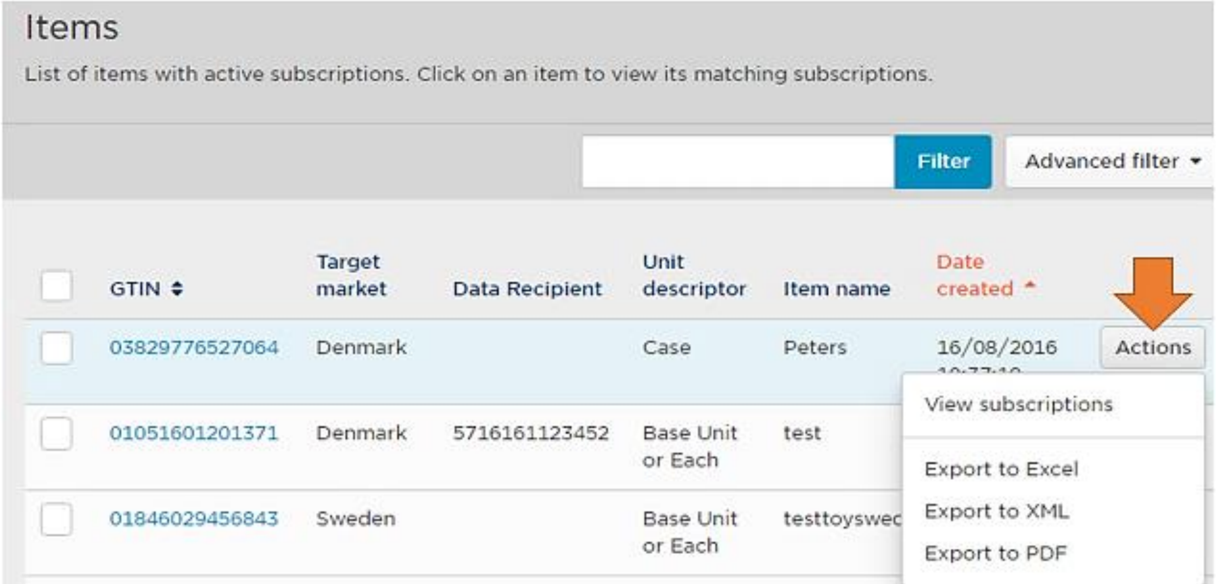


Fig. 3-28

3.4 Administration

3.4.1 Profile Settings

Every DS-user can administrate his/her own profile settings by clicking on your user name and select *User Settings* in upper right corner page (Fig. 3-29).

Here, among others, you can change your password, your email address and the language (Danish, English and Hungarian are available).

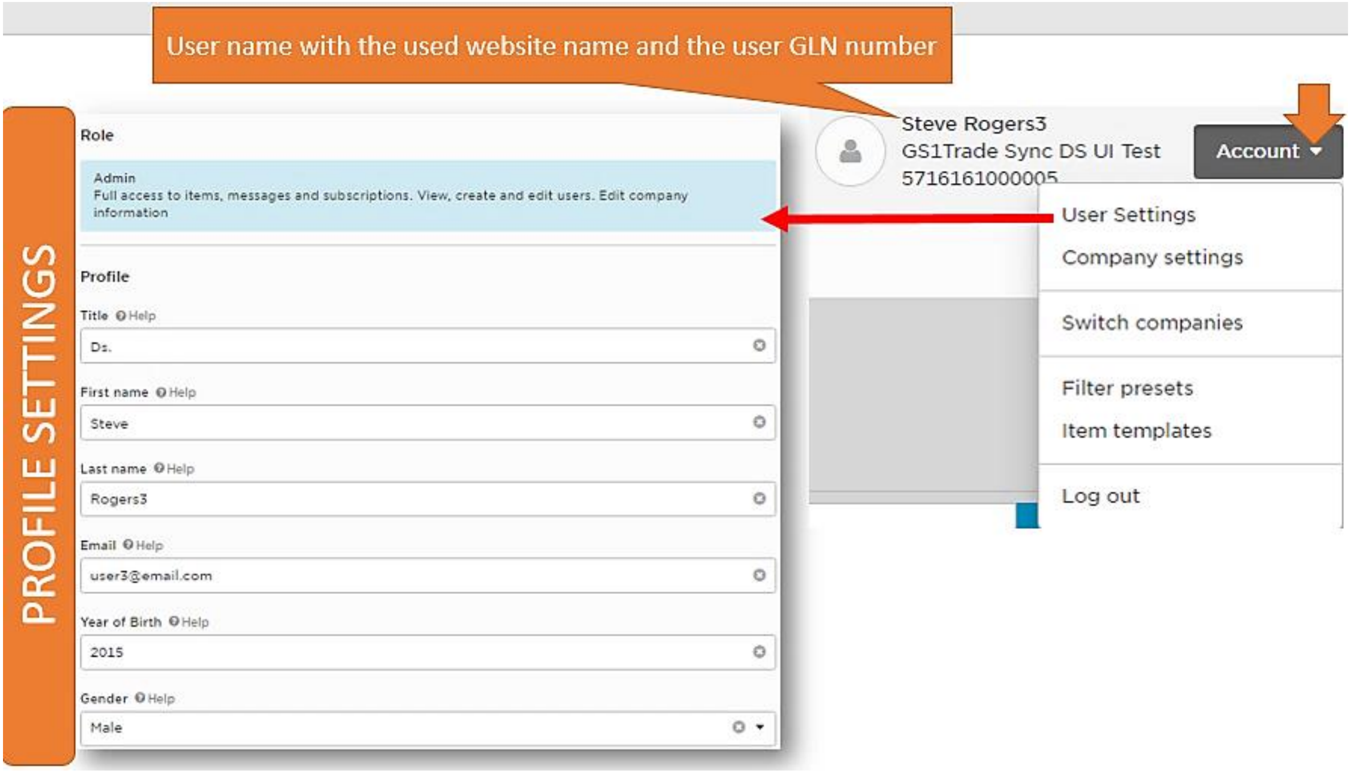


Fig. 3-29

When you click on your user name, you can perform additional operations beside user settings (Fig. 3-30, Fig. 3-33 and Fig. 3-32):

- Edit/Save company information and interface communication type by *Company settings* submenu.

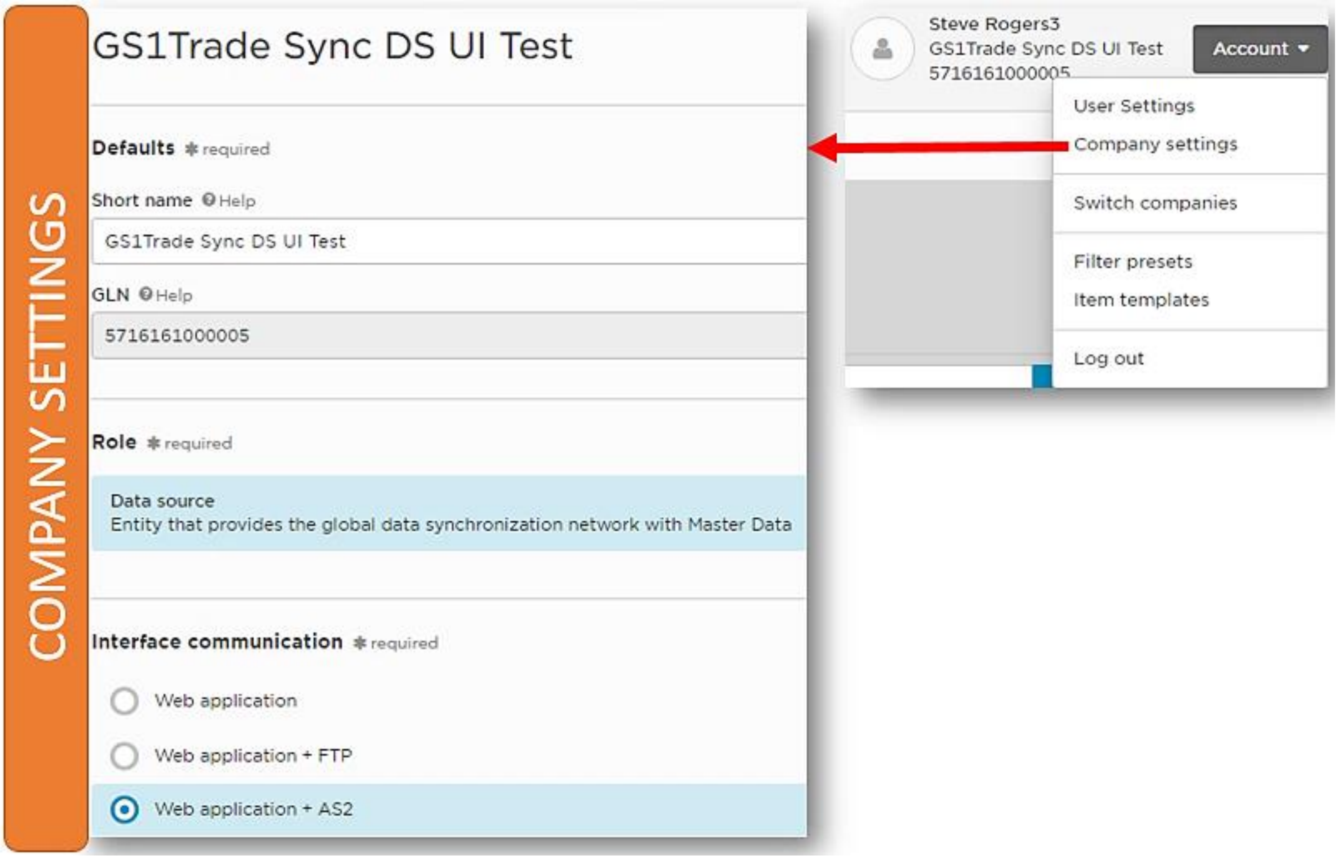


Fig. 3-30

- Switch to another company if you need by *Switch companies* submenu

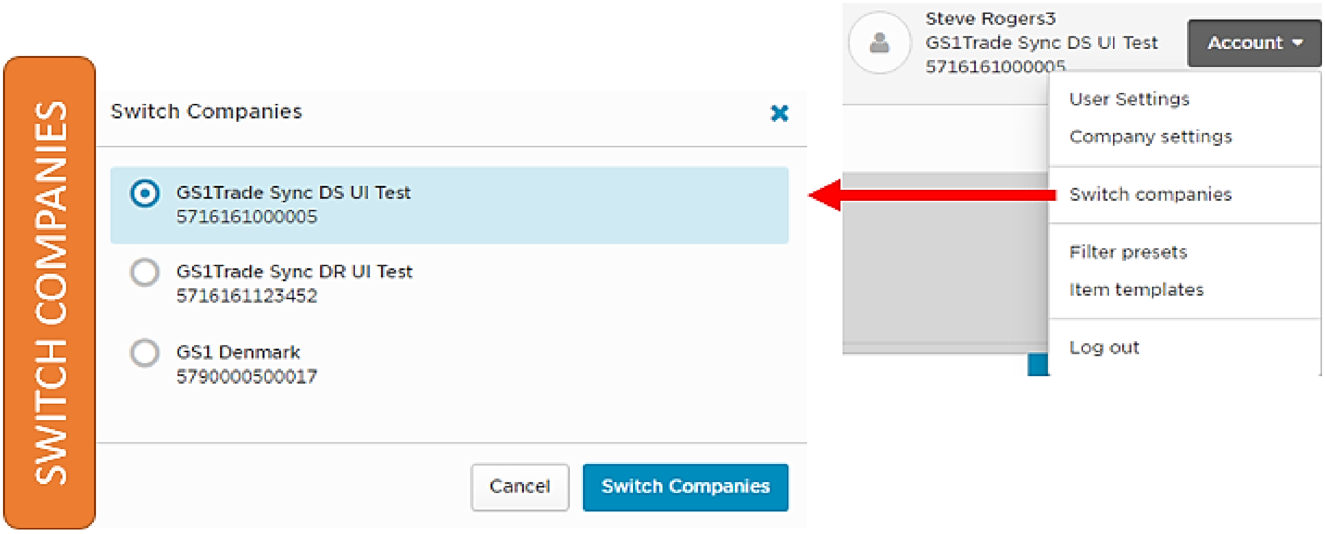


Fig. 3-31

- Open/Delete your already set filter by *Filter presets* submenu
- Edit/Delete an item template from your already created item templates by *Item templates* submenu. The *Item template* is a useful tool to create and edit item data structure saved for later usage of user.
- You can log out through *Log out* submenu.

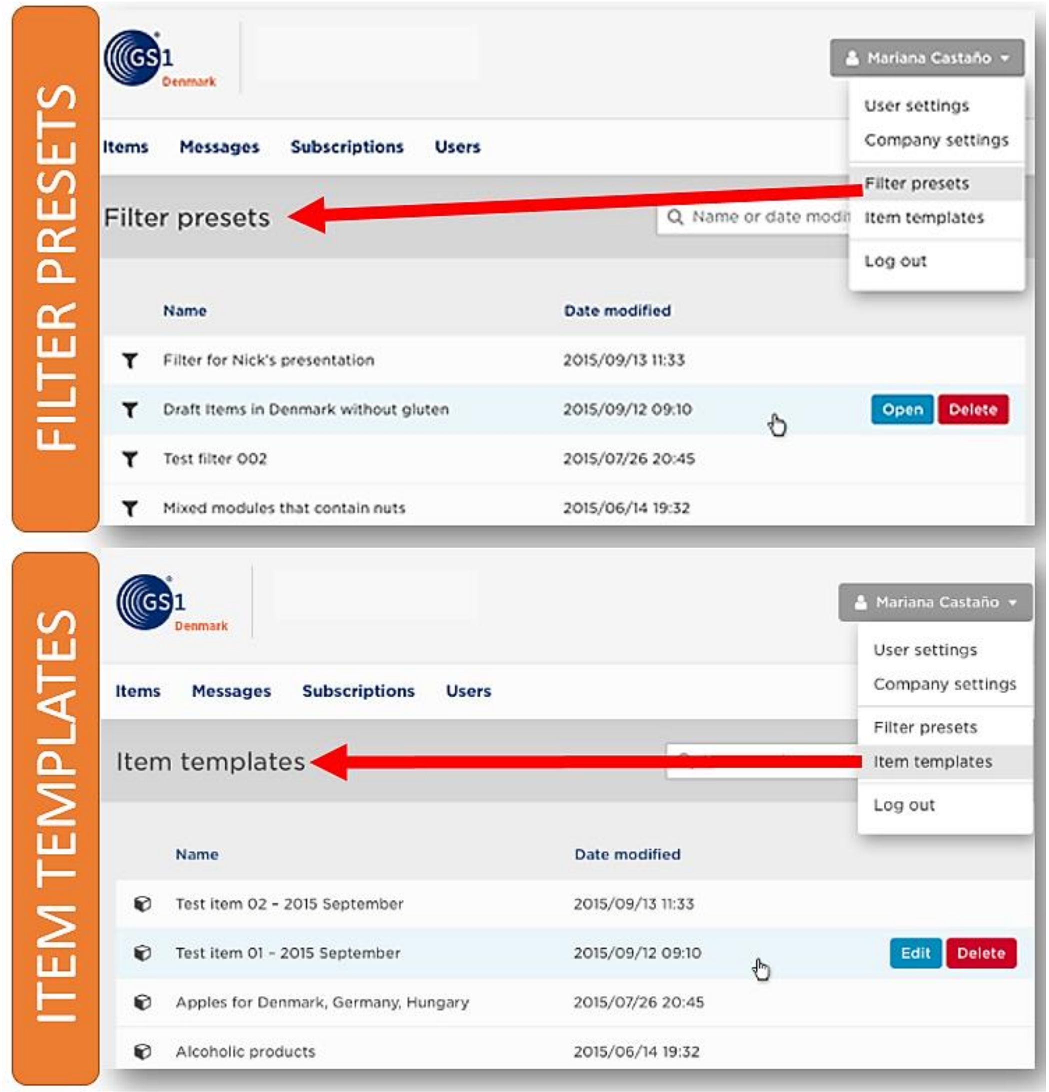
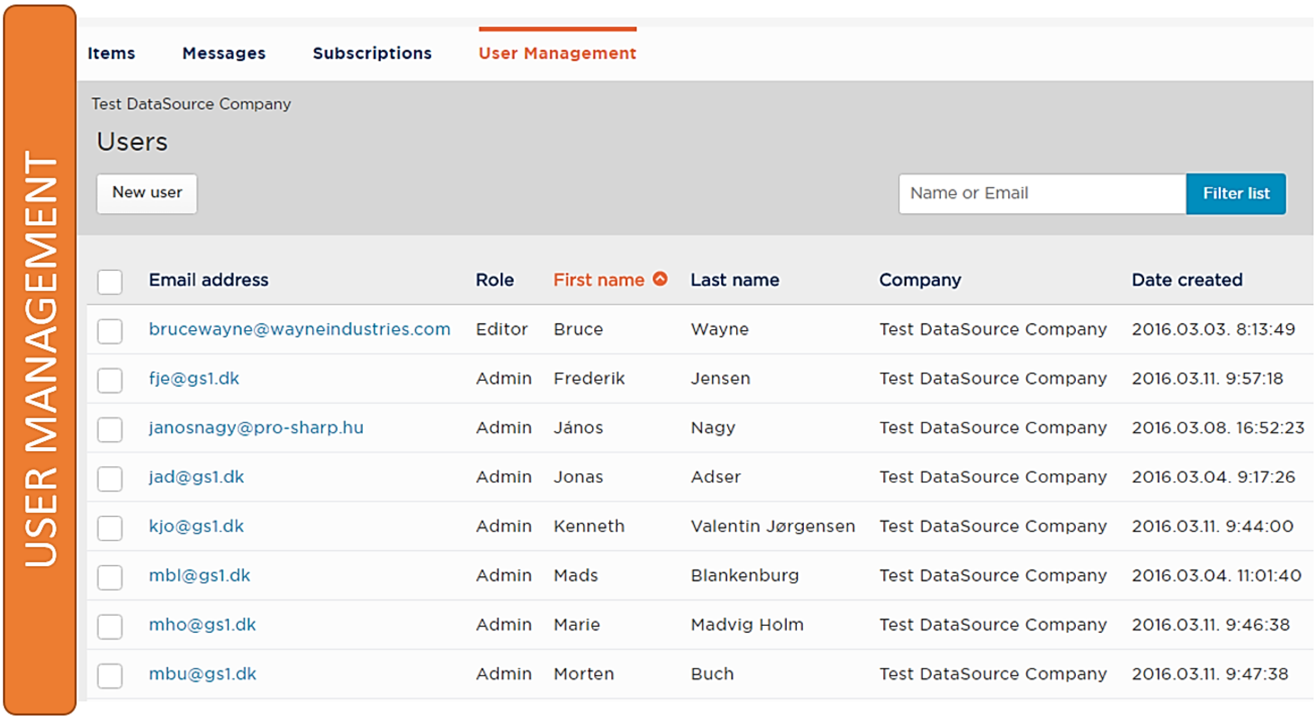


Fig. 3-32

3.4.2 The Role of a Company Administrator

A company administrator has full access to items, messages and subscriptions. He/she can view, create and edit DS-company users and edit company information. A DS-user with company administrator role can perform through menu *User Management* the administration tasks (Fig. 3-33).



Email address	Role	First name	Last name	Company	Date created
brucewayne@wayneindustries.com	Editor	Bruce	Wayne	Test DataSource Company	2016.03.03. 8:13:49
fje@gs1.dk	Admin	Frederik	Jensen	Test DataSource Company	2016.03.11. 9:57:18
janosnagy@pro-sharp.hu	Admin	János	Nagy	Test DataSource Company	2016.03.08. 16:52:23
jad@gs1.dk	Admin	Jonas	Adser	Test DataSource Company	2016.03.04. 9:17:26
kjo@gs1.dk	Admin	Kenneth	Valentin Jørgensen	Test DataSource Company	2016.03.11. 9:44:00
mbl@gs1.dk	Admin	Mads	Blankenburg	Test DataSource Company	2016.03.04. 11:01:40
mho@gs1.dk	Admin	Marie	Madvig Holm	Test DataSource Company	2016.03.11. 9:46:38
mbu@gs1.dk	Admin	Morten	Buch	Test DataSource Company	2016.03.11. 9:47:38

Fig. 3-33

Next set of functions captures a DS-company administrator work:

- **Adding new user** (Fig. 3-34): You can add new user to your company by clicking *New user* in *User Management* window. In the appearing window you need to set the role (Admin or Editor or Viewer[5]) of the new user. Next fields in the window are related to necessary personal user information (name, contact data, language setting). Save the settings by clicking *Save changes* button.

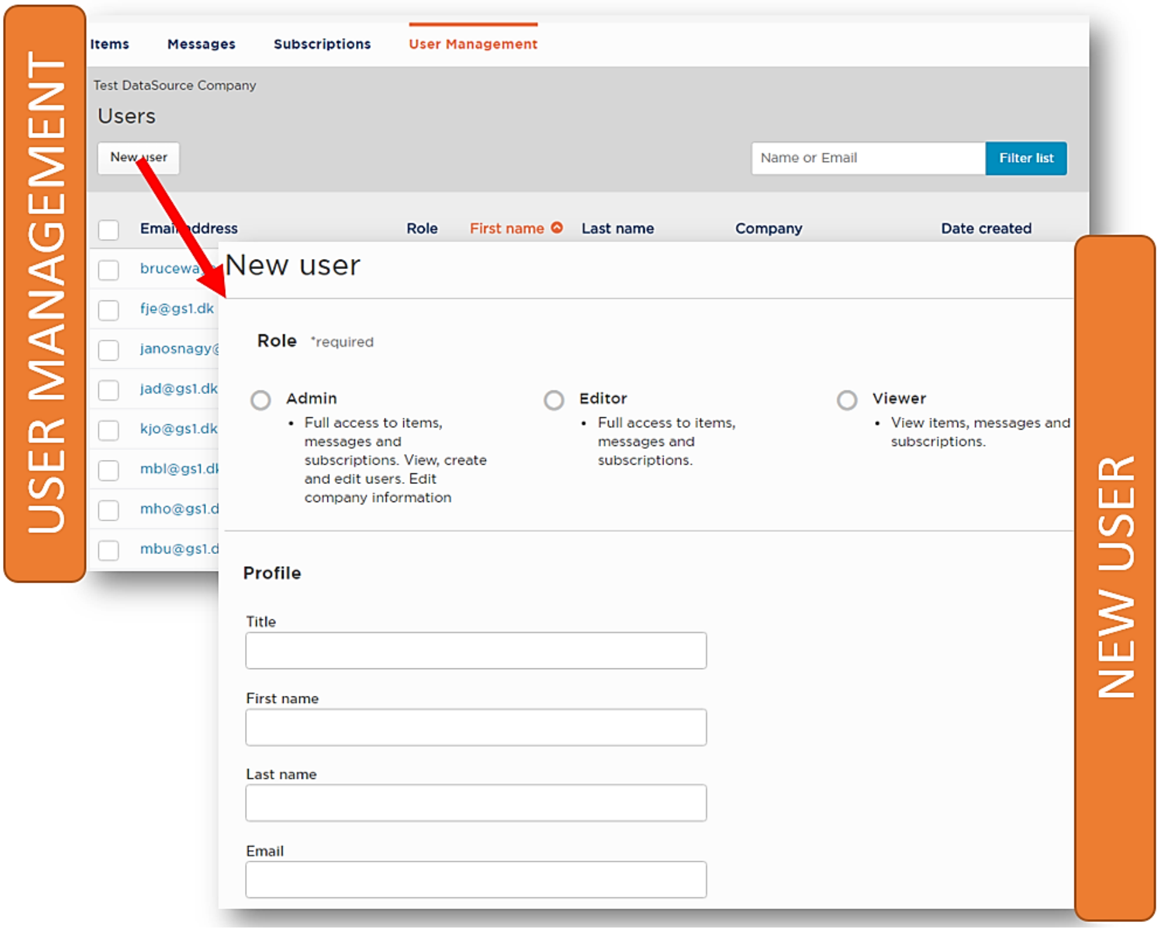


Fig. 3-34

[5] See details about user roles in Section 2.

- **Delete a user** (Fig. 3-35): If you want to delete a user, select it from *Users* list and then click *Delete* button or use *Actions/Delete* function. Finally, confirm it.

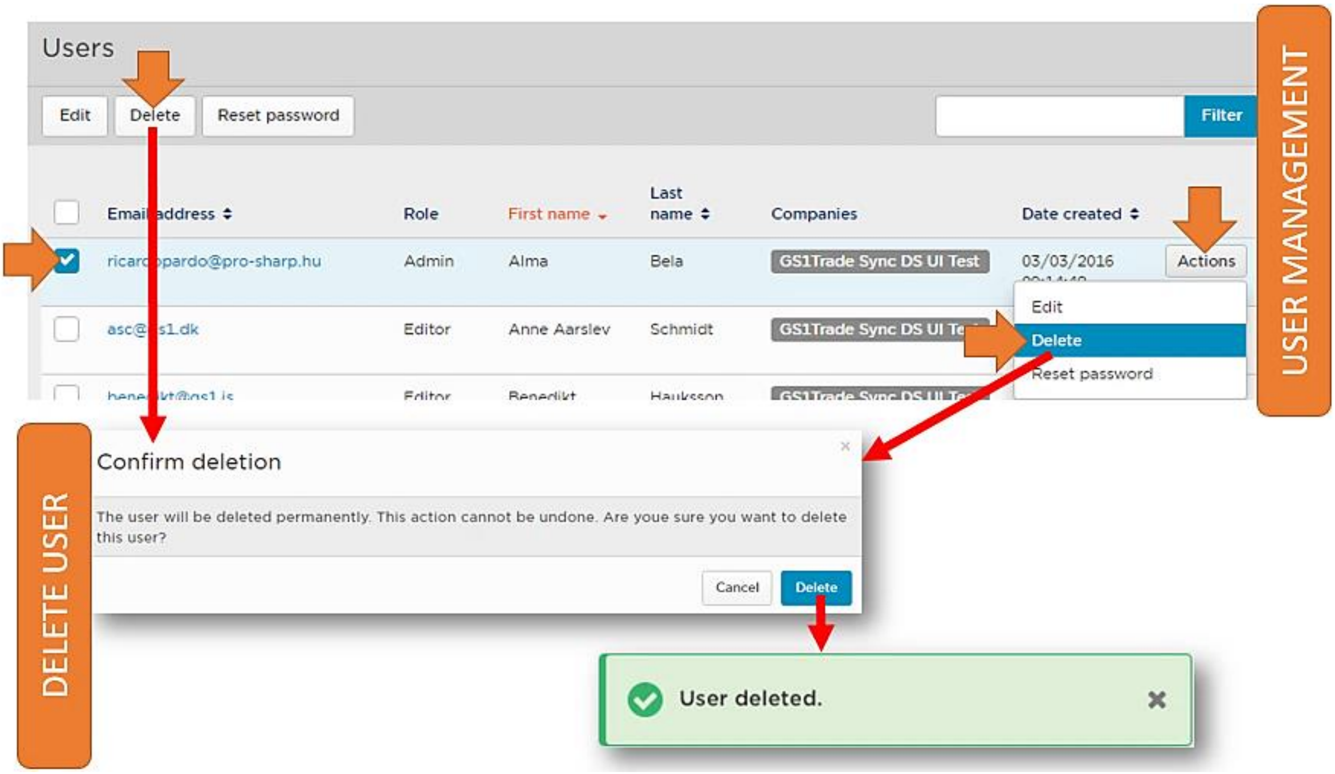


Fig. 3-35

- **Edit a user** (Fig. 3-36): You can edit the already created user data by the clicking *Edit* button or by using *Actions/Edit*. Save the changes by clicking *Save changes* button.

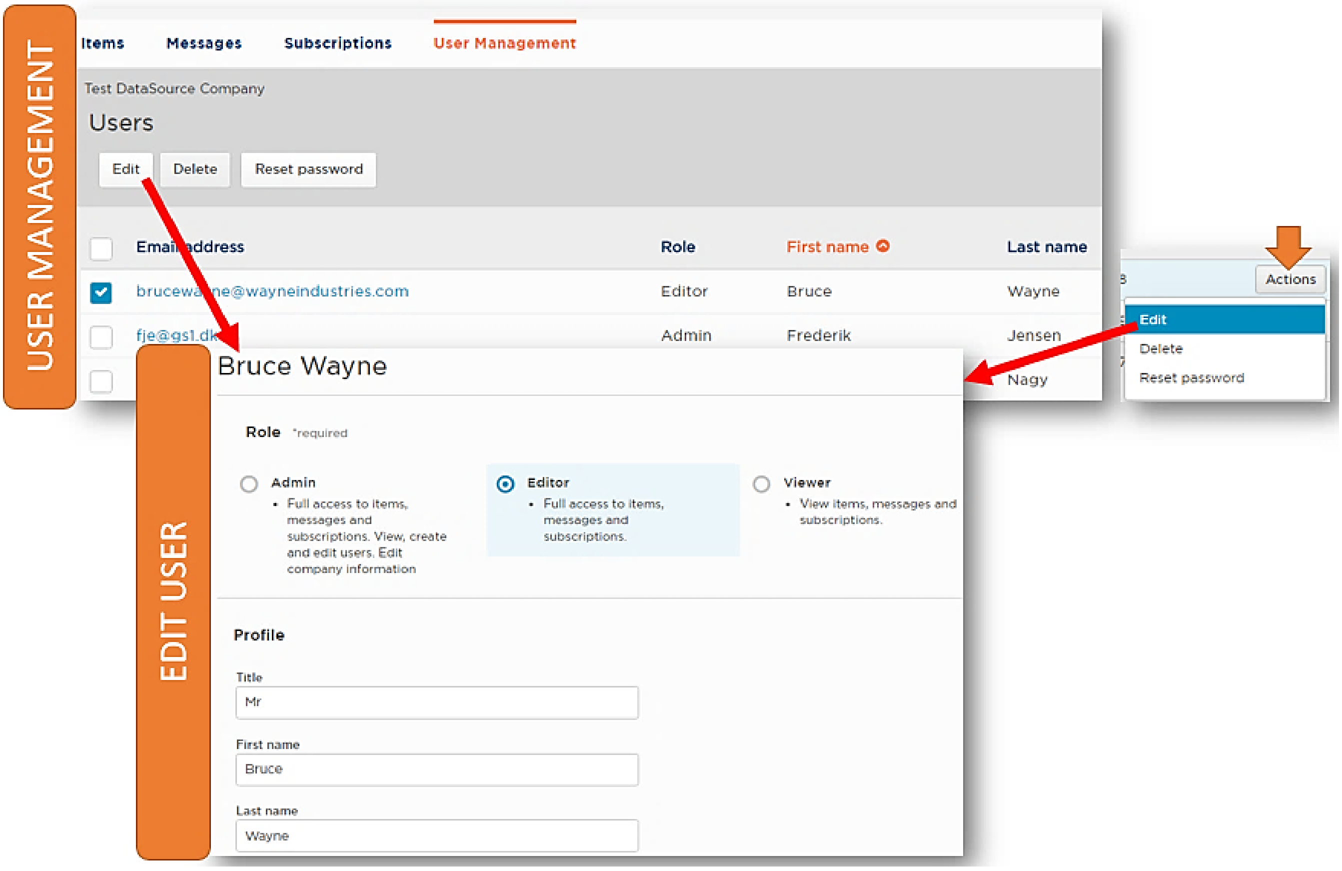


Fig. 3-36

- **Reset password** (Fig. 3-37): When a password reset is necessary for a user, select the corresponding user, click *Reset password* button or use *Actions/Reset password* and then click *Send email* button to send an email with instructions on how to reset the password the user.

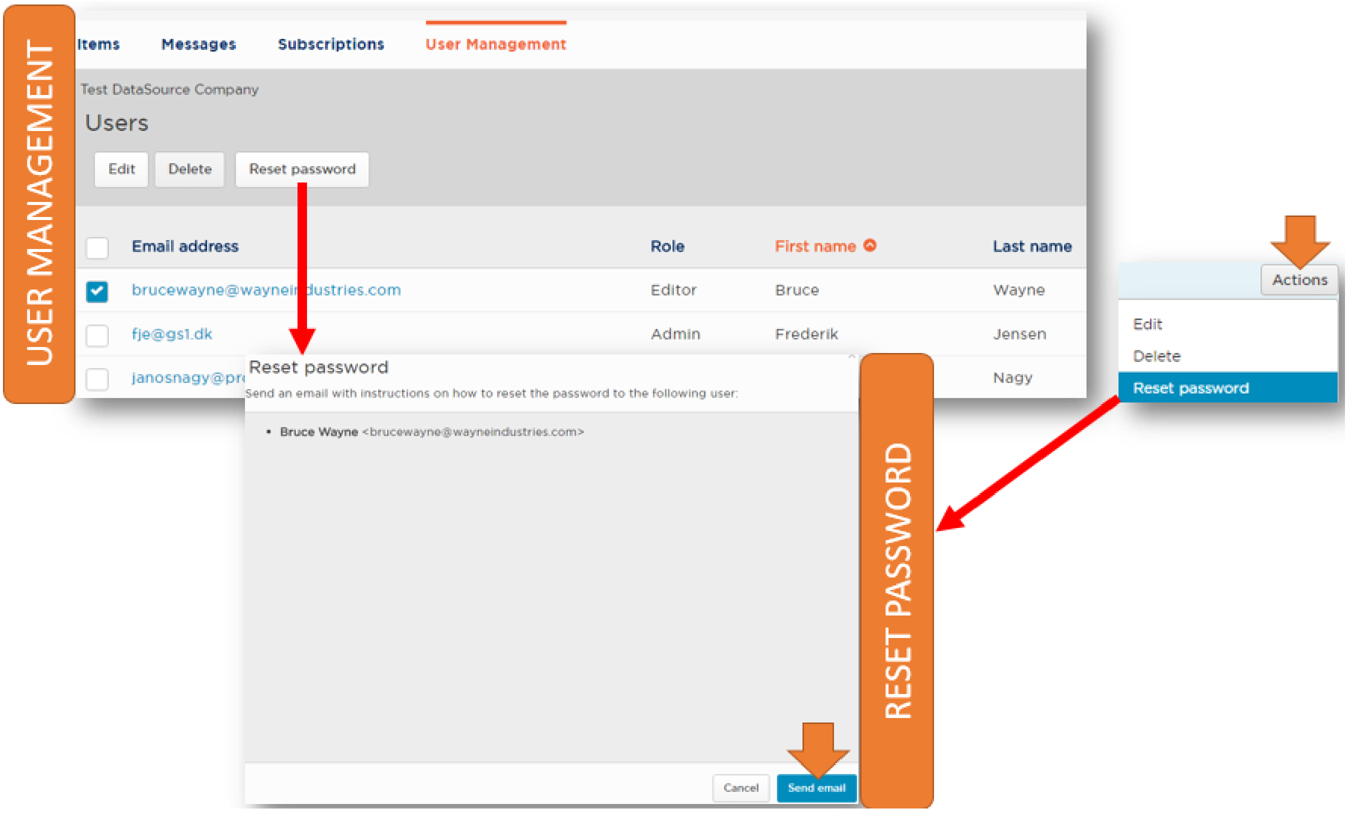


Fig. 3-37

4 Appendix

4.1 CIC Statuses

CIC Status	*Definition*
Accepted	*Has been received by the Data Recipient, but no business decision has been made on the data.*
Rejected	*Data will no longer be synchronised or updates will no longer be provided.*
Synchronised	*Data is integrated, in synch.*
Review	*The Request to the DS to review their data and take action (applies to adds and changes/correct) because the DR has received discrepant data which the cannot synchronise.*

4.2 Abbreviation

Abbreviation	*Term*
CIC	*Catalogue Item Confirmation*
DR	*Data Recipient*
DS	*Data Source*
GDSN	*Global Data Synchronisation Network*
GLN	*Global Location Number*
GPC	*Global Product Code*

4.3 Glossary

Data Recipient (DR) – It represents the demand side data. It can be a company that receives product information from a data source. This "company" could be a retailer, hospital, distributor, wholesaler, foodservice operator, group purchasing organization, government, etc.

Data Source (DS) – It represents the supply side data. It can be a company (supplier, manufacturer, distributor etc.) that enters product information into GDSN-based synchronisation systems that are sent to DRs.

Global Location Number (GLN) – It can be used by companies to identify their locations, giving them complete flexibility to identify any type or level of location required.

Global Product Code (GPC) – It classifies products by grouping them into categories based on their essential properties as well as their relationships to other products. GPC offers a universal set of standards for everything from a car to a litre of milk.

4.4 List of Figures