

Content Loading 100

Overview and Module Objectives

Module Overview

This Content Loading module is designed to assist users who are responsible for providing catalogue information into GoCM.

Since the initial load of Supply Arrangements and Standing Offers is complete, the module starts by demonstrating the process for accepting data into GoCM. The processes for loading data are also included for future data loads.

The numerical menu bar above this text indicates which section of the module you are in.

- 1. Overview and Module Objectives
- 2. Step-by-Step process with screen shots
- 3. Review
- 4. Helpful Tips and Job Aids

While you can skip menu items, we recommend that you follow the natural progression of the module as it will help you better understand how to work in GoCM.

Objectives of this Module

This GoCM Content Loading module is designed to assist you in understanding the process for loading and accepting catalogue data into GoCM.

This module is designed to provide step-by-step assistance to Commodity Managers and other roles in completing this important task.

The objectives of this module are to allow users to:

• Accept loaded data

Additional information available to you includes:

• Completing templates

Step-by-Step Process with Screen Shots

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Accepting Loaded Data

To begin the process of accepting or rejecting catalogue data, you will receive an email from the service provider's content team. It will state the name of the catalogue and that it is awaiting your acceptance. You have to go into GoCM to continue the process.

Log into GoCM. Since you are identified as someone responsible for providing data into GoCM, you will notice an additional tab called *My Approvals* at the top of your GoCM screen. This is demonstrated below.

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Go to My Approvals, Approve Catalogue Entries.

In the *Edit Catalogues* section, you will notice many catalogues under the *Catalogue Overview* section. This area shows you all other Commodity Managers' catalogues.

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To ensure you only view your catalogues, you can select your catalogue and click *Add to Favorites*. The process allows you to easily find your catalogues. You may have to scroll down to the bottom of the page or browse through additional pages.

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Alternatively, you can copy and paste in the agreement number from the notification email into the Catalogue ID column, and click the *Filter* icon to narrow down the selection as demonstrated below.

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If you have multiple catalogues, you will only be able to select one catalogue at a time for this process.

Once you have identified your favourites, scroll back to the top of the screen.

Under *Find Catalogue*, search for the *Catalogue Type* that says *My Favorites* as demonstrated below. You can leave the *Last updated on* date selections blank if you wish. Click on *Start* to proceed with your search.

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Your search results have identified two catalogues under *My Favorites*. Under the *Acceptance Status* column, you will notice the status of the catalogues. Those identified as *Awaiting Acceptance* require your attention.

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Select the catalogue for which you need to change the status. Click on *Edit* to continue. You may need to scroll down to the bottom of the screen, as demonstrated below.

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You will enter the *Content* tab. If you go into the *Find Items* section, you can find the catalogue items that you want to review. Use the *Item ID / Item Name* field to find a specific item. Click *Start* to begin the search.

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Once you are satisfied with the content of your catalogue, you can proceed to the *Update Overview* tab to accept or reject the catalogue.

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In this section, you will notice three drill-down sections of information.

1 - *Acceptance Status*. This area lets you *Accept* or *Reject* the catalogue. Click on one of the buttons. To complete the process, *it is necessary to click on the*

'Save' button at the top of the screen. If you do not save the catalogue, your acceptance or rejection will not take effect.

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2 - **Upload Overview**. This area identifies the number of uploads since the last acceptance or rejection. It also identifies what has been modified within the catalogue itself.

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3 - **Details of Update**. As the name implies, this section provides details of the upload. The first tab – **Overview** provides a high level overview of catalogue content. The second tab – **Categories** identifies the categories to which the items in the catalogue belong. The third tab – **Items** provides the list of items in the catalogue.

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Completing Templates

The content template lists the approved catalogue characteristics that currently exist for GoCM catalogue content. Not all characteristics apply to all commodities. A notable distinction is that some characteristics used to describe goods are shared with services but also some are unique to goods such as supplier part number. The content template is enhanced over time, a current copy of the content template is available from:

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e-mail: rachelle.o'meara@pwgsc.gc.ca

When creating a template, characteristics that are not required can be either hidden or deleted. When completed templates are returned for validation and content processing, the GoCM Catalogue Assistant will ensure that template contents are copied correctly into the correct columns in the Assistant.

Excel is the principal means of gathering content information for the GoCM catalogue. The data must be entered into Excel in a particular manner and sequence in order that the GoCM catalogue will be properly populated. Furthermore, the construction of the Excel file becomes even more important when the Classification Level 1 data associated with an agreement must be viewable by a subset of departments/agencies and regions.

Review

Review

In this module you learned how to accept loaded data.

Additional training tips on GoCM Content Loading can be found in the next section *Helpful Tips and Other Job Aids*.

Helpful Tips and other Job Aids

Quick Links

• User Guide

FAQs

- How to Build Pricing Scales Using Multiple Rows?
- How to enter Multiple Rows into the Excel Spreadsheet?
- How to Enter Multiple Values in a Cell?