

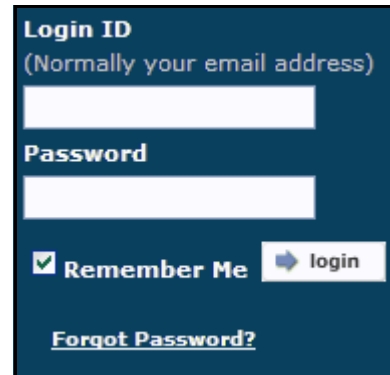
LOGGING IN TO KETERA SUPPLIER CONTENT MANAGEMENT

1. Type **http://www.ketera.com** in your Internet browser's address field.
2. Click **Customer Login**.
3. Type your **Login ID** and **Password**.

NOTE: Login IDs and Passwords are case-sensitive.

4. Click **Login**.

NOTE: Use the Login Id and password your Account Administrator sent to login to KSCM for the first time. If you enter an incorrect password more than thrice, your account will get locked. To unlock your account and reset the password, click the Forgot Password? link and provide the necessary details.



Login ID
(Normally your email address)

Password

 Remember Me
[Forgot Password?](#)

CHANGING YOUR PASSWORD

1. Click **Change Password** Link.
2. In the popup screen, enter your new password.
3. Re-enter the password to confirm it and click **Save**.

[Change Password](#) | [Help](#) | [Logout](#)

Welcome **lfl@ketera.com**

Go to

NOTE: The password must contain at least 8 characters consisting of both letters and numbers and changed at least once every 90 days.

USING CONTENT MANAGEMENT

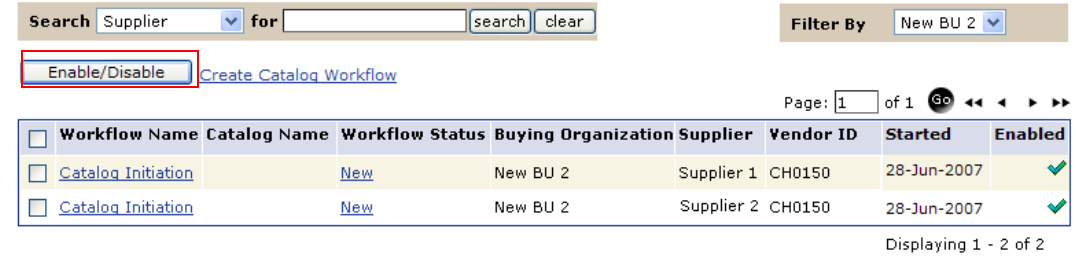
The top navigation tabs can be selected to change the information that is displayed in the main portion of the screen. The following navigation tabs are available:

- **My Ketera** lists the top 5 tasks. You can navigate to the entire list by clicking the Tasks tab.
- **Tasks** allows you to access and complete the tasks assigned to you.
- **Catalogs** allows you to upload, view, or modify catalog contents.
- **Workflow** for initiating catalog or refreshing catalogs workflows.

The top navigation link, **Logout**, ends your Content Management session.

CREATING A CATALOG WORKFLOW

1. Mouse-over the **Workflow** tab, select Catalog from the drop-down menu. The Workflow list page appears.
2. Click **Create Catalog Workflow**.



Search for

Filter By

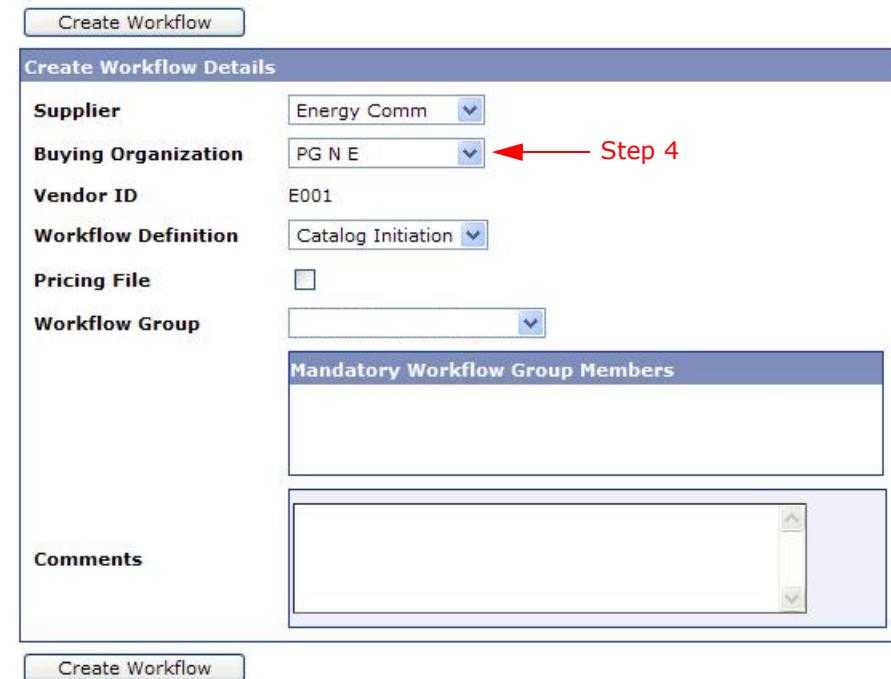
[Create Catalog Workflow](#)

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<input type="checkbox"/>	Workflow Name	Catalog Name	Workflow Status	Buying Organization	Supplier	Vendor ID	Started	Enabled
<input type="checkbox"/>	Catalog Initiation		New	New BU 2	Supplier 1	CH0150	28-Jun-2007	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Catalog Initiation		New	New BU 2	Supplier 2	CH0150	28-Jun-2007	<input checked="" type="checkbox"/>

Displaying 1 - 2 of 2

3. Select a **Supplier** from the drop-down list.
4. Select the **Buying Organization** from the drop-down list for whom you want to initiate a Workflow.



Create Workflow Details

Supplier

Buying Organization ← **Step 4**

Vendor ID

Workflow Definition

Pricing File

Workflow Group

Mandatory Workflow Group Members

Comments

5. In the **Workflow Definition** field choose "**Catalog Initiation**" from the drop-down menu if you want to request a new catalog or "**Catalog Refresh**" to update an existing catalog.
6. Check the check box next to Pricing File if you are requesting a catalog with plant or region specific pricing. (See the "PSP Catalog" Quick Reference Guide for additional information on creating a plant/region specific catalog).
7. Select a **Workflow Group** from the drop-down list. The **Workflow Group Members** box displays default members of a workflow group.
8. Use the drop-down lists to select the **Commodity Code Assigner** and **Supplier User** for the workflow. If you want to select members for optional tasks, click the + sign on the Optional Workflow Group Members and assign users for the tasks.

When creating a workflow, you can add optional steps to review the 'Upload Catalog' or the 'Rationalize Content' tasks of the workflow. The designated catalog reviewer can review the catalog and either approve it to move it to the next step of the workflow, or send in back to the previous step for suggested modifications. The reviewer could be either from the buyer or the supplier organization and configured through the Optional Workflow Group Members section. In case, the Content Rationalization task is skipped, the Workflow does not go through the Content Review task.

NOTE: The default Catalog Approver is the Primary Approver. If you select another user as the Catalog Approver, the system designates the selected user as the Secondary Approver. The catalog will then be routed to the Primary Approver after it is approved by secondary approver. To change the Primary Approver refer to step 2a in the section titled 'Associating a Supplier and Business Unit'.

9. Enter any suitable comments.
10. Click **Create Workflow**.
11. To edit workflow group members on this page, click the **Edit Workflow Group Members** link. In the popup screen, use the drop down lists to assign new members and click **Update Workflow**.

UPLOADING A CATALOG

1. Click **My Ketera** or the **Tasks** tab.
The tasks assigned to you are listed.
2. Click the appropriate **Upload Catalog** task name.

Task	Catalog Name	Buying Organization	Vendor ID	Status	Assigned To	Start Date	Due Date	Reassign
Upload Catalog		Chevron		OVERDUE	dlenac@chevron123.com	18-Jul-2007	26-Jul-2007	

Displaying 1 - 1 of 1

The Task Detail page appears.

Task Details

Task Upload Catalog
Task Description The catalog needs to be uploaded.
Buying Organization Ketera **Supplier** Test Supplier
DUNS **Vendor ID**
Start Date 18-Jul-2007 **End Date** 26-Jul-2007
Effective Date ← **Step 3**
Sample Catalog [KSCM_Catalog_Upload_Template_4.0.xls](#) ← **Step 4**
Catalog Name ← **Step 7**
Select Catalog ← **Step 8**


Comments

Comments	Supplementary File	User	Created Date	Task
Reassigned Task		santhosh kumar	20-Jul-2007	Upload Catalog - Task Reassigned
		Content Admin	18-Jul-2007	Create Workflow

3. In the **Effective date** field, use the calendar to select the date on which this catalog must be published (if required). If a date is not provided, the catalog will be published upon catalog approval.
4. For new catalogs, click the **Sample Catalog** link to download a copy of the catalog template.
5. Open the catalog template and build the catalog using the template.
6. For catalog updates, click the **Catalog File** link to download a copy of the most recent catalog. Once you have downloaded the file, open it and make the changes. Save it to the relevant location. Proceed to Step 8.
7. If this is a new catalog, enter a name in the **Catalog Name** text box following the naming convention of <Supplier Name_Catalog ID>.
8. Click **Browse** at the **Select Catalog** field, navigate to the relevant location, and select the catalog to upload.
9. Review the task details and enter suitable comments. Comments entered by other users responsible for previous tasks appear on this page. You can also browse for file and attach it to the comments section. Attached files will be uploaded as a supplementary file and can be referenced from the comments section.

NOTE: If you only want to add comments to this task, enter the comments in the comments field and click Add Comments.

- In case the catalog is erroneous and needs to be corrected, you can send the catalog to the previous step. To send the catalog to the previous step, click **Send Back**.
- Click **Complete** Task. The catalog contents are validated. If no errors are found, you will be taken back to the Tasks page and the task was completed successfully.
If any errors are identified, you will see a message link in red at the top of the screen.

This catalog has validation errors. Please click here to view details 

Complete Task Reassign Add Comments Send Back

Task Details


Task Upload Catalog

Task Description The catalog needs to be uploaded.

Buying Organization Ketera **Supplier** Test Supplier

DUNS **Vendor ID**

Start Date 18-Jul-2007 **End Date** 26-Jul-2007

Effective Date 

Sample Catalog [KSCM_Catalog_Upload_Template_4.0.xls](#)

Catalog Name

Select Catalog Browse...

Comments

Comments	Supplementary File	User	Created Date	Task
Reassigned Task		santhosh kumar	20-Jul-2007	Upload Catalog - Task Reassigned
		Content Admin	18-Jul-2007	Create Workflow

Browse...

Complete Task Reassign Add Comments Send Back

- Click this link to view the error details. To successfully complete the task you must correct the errors in the catalog, and then repeat steps 8 through 11.

NOTE: If the upload catalog task generates more than 50 errors, you can download the errors in the form of a .txt file.

REASSIGNING A TASK

NOTE: Only owners of a task and users with access to perform the task can reassign a task.

To reassign a task:

- In the **Task Details** page, click **Reassign**.
- In the Reassign Task popup that appears, use the **Assign To** drop-down list to select the name of the user you want to reassign this task to.
- Add suitable comments and click **Assign**.

Task Details

Task Upload Catalog

Task Description The catalog needs to be uploaded.

Buying Organization New BU 1 **Supplier** New Supplier 1

DUNS C00000009 **Vendor ID** CH0150

Start Date 15-Nov-2006 **End Date** 22-Nov-2006

Assign To* **Comments**

Assign Close

DELEGATING TASKS

- Click **My Ketera**.
- Click the **Delegation Details** link at the bottom of the page.

The page lists the details of the users who have delegated authority to you in the **Delegations to Me** section and the details of the users you have delegated authority to in the **My Delegations** section.

Displaying 1 - 1 of 1

Page: of 1 Go « »

My Delegations						
Select	User Name	Email Address	Phone	Start Date	End Date	Notification
<input type="checkbox"/>	Supplier Admin	supadmin@test.com		30-Jul-2007	31-Jul-2007	<input type="checkbox"/>

Remove Delegation

[Add Delegation](#)

Displaying 1 - 1 of 1



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Delegations To Me						
User Name	Email Address	Phone	Start Date	End Date	Notification	
Administrator	admin@test.com	558587858	30-Jul-2007	31-Jul-2007	<input type="checkbox"/>	<input type="checkbox"/>



Save Notification

- To delegate your authority, click **Add Delegation**. The **Create Delegation** page appears.

Create Delegation

User Name  

Email ID **Phone Number**

Start Date  **End Date** 

Delegate Tasks Close

- Click the **Search** icon at the **User Name** field and select the user(s) to whom you want to delegate your tasks.
The Email-id and the Phone Number of the selected user are displayed.

5. Click the **Calendar** icon at the **End Date** field to select the date up to which the selected user(s) will be performing your tasks.
6. Click **Delegate Tasks**.
The tasks are delegated to the selected user(s) and listed in the Delegation Details page under the My Delegations section.

NOTE: To delegate tasks to multiple users, repeat steps 5 through 7 by selecting the same start dates and end dates.

In the Delegations To Me section of the Delegation Details page, if the **Notification** checkbox is selected, you will receive an e-mail notification informing you each time there is a new task assigned to the user who has delegated their authority to you.

SEARCHING FOR A CATALOG

1. Click the **Catalogs** tab.
2. Select the category on which you want to base your search: Catalog, Supplier, Vendor ID, Status.



3. Correspondingly enter, in part or whole, your search text.
4. Click **Search**.

CHECKING THE STATUS OF A CATALOG

1. Click the **Catalogs** tab.
2. Search for the Catalog.
3. When you have located your catalog, click the link in the **Status** column to view the status details.

The highlighted row indicates the current workflow status.

Workflow Stage	Workflow Status	Description
1.	New	Workflow is new.
2.	Catalog Uploaded	The catalog has been submitted.
3.	Catalog Upload Reviewed	The catalog has been reviewed and accepted.
4.	Content Rationalized	The content has been rationalized.
5.	Content Rationalize Reviewed	The Content Rationalize has been reviewed and accepted.
6.	Assigned Commodity Code	The catalog has been assigned with commodity code.
7.	Buyer Approved Secondary (Optional)	The catalog has been secondary approver approved.
8.	Buyer Approved	The catalog has been buyer approved.
9.	Pushed To Production	The catalog has been pushed to production.

HOW TO CONTACT US

For any assistance in configuring and using this application, you may contact your Ketera Supplier Representative or send an email to customerservice@ketera.com.