OptiCat, LLC.
Software User's Guide

Our Mission

At OptiCat, it is our mission to be "the" go-to-source for industry-wide, high value, data related programs benefiting aftermarket suppliers and their customers .... The Industry Strategic Advantage"

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OnBoard

Overview

OptiCat's purpose is to provide a turn-key, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to their distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. OptiCat's primary business strategy is a "self-service" technology model that enables industry partners to share valuable information via OptiCat Technology Suite. OptiCat is exclusively a technology provider.

To gain access to OptiCat OnBoard, browse to this URL:

www.opticatnetwork.com/OnBoard

Originally, OnBoard was designed based on the plug-in Silverlight. Unfortunately, the most common browsers have now disabled this plug-in. We have redesigned OnBoard to work across all platforms: Firefox, Chrome, Safari & Microsoft Edge.

*An Important Note: OnBoard and OnDemand will be supported in all platforms except for IE.

Logging In

- Sign in from the landing page.
- Enter username and password, provided to you by OptiCat's support team.
- If you forget your username or password, use provided links to enter the email or username originally linked to your account, reset links will then be sent.

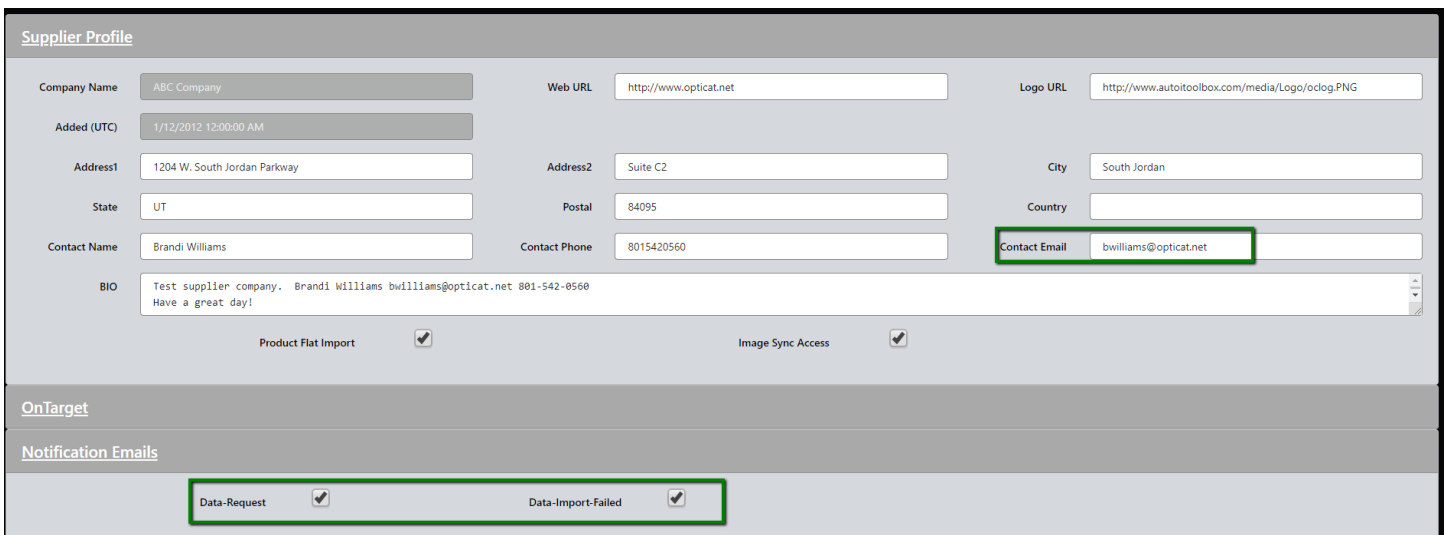# *Managing Your Account*

- Click on Configure.
- Click on the Supplier drop down.

- In the Supplier Profile dropdown: you can update Contact Info, Web Info, and Company BIO. If the Company Name needs to be modified, please contact OptiCat.
- OnTarget settings: Show what features are available to your account. These setting are adjusted by OptiCat Admin only, please contact us if you have any questions.
- Notification Email settings are for the contact manager.

- Data-Request: When box is checked it turns on the notification that lets the contact manager know the receiver would like access to the product line.
- Data-Import-Failed: When box is checked it turns on the notification letting the contact manager know a file has failed validation

Managing Users

- Click on your username next to your company name
- Click on Manage Account
- Here you can delete users and/or create new users if your role is Manager.
- Managers can email a password reset link here.
- To delete a user, simply select user in the drop-down menu and click **_Delete._**
- To create a new user, click the drop down next to your name and click on **_Create New._**
- Create a new username, enter the full name & email address. Choose if they will have user or manager rights.
  - Note: the difference between User rights and Manger rights is a "manager" can create, delete, and manage users.
- Choose Email Notification Options. You can be notified when a receiver requests access to your product lines as well as when an import has failed.
- To change your password 'Click the 'Email a password reset link'. Once a password reset link has been used, that email will now be verified, and a manager can update password from this screen.
- Click **_Save._**

Product Lines

Creating a new product line:

- Click on **_Product Lines_**
- You do not need to click on 'Create New' if this is your 1st Product Line created.
- To create a new Product Line: Click the drop down next to Product Line, then (create new…). Enter Product Line name. (i.e. "Manufacturer Brakes ACES", "Manufacturer Suspension PIES", or "Manufacturer Filter Images" etc.)
- Do not include any date format in the Product Line name.
- Enter your Brand AAIA ID. This is not required to save Product Line but is HIGHLY recommended as it is visible from the OnDemand Portal.
- Manager Name, Phone, & Email will default automatically from the Administrator settings. If you would like a product line to be assigned to a different contact, you can update new contact information that in this screen.
- Channel Partners prefer product line by file type, for example: ACES, PIES, and Images should all be in separate product lines. This way a receiver of your data is not forced to get images and ACES if they are only needing PIES. There is no limit to how many product lines you create.
- **Private Label:** Takes visibility away from all receivers, enabling you to control who sees that this product line is available. This is a great option for receivers who require their own unique files.
- **Auto Publish:** When selected, this automatically sends new data that you upload to receivers that you have previously given permission to, that have your product line 'In Library' status.
- **In OnLine Catalog:** This will determine if your data is visible in the OnLine Web Catalog www.opticatonline.com
- **ACES ID Validation:** If this option is set to Mandatory via the drop down, every ACES record will be validated during the import process, even if the record has been set as "Validate = NO"
- **In Web Services:** Makes data available for Channel Partners using Web Services.
- Click **_Save_** if any changes have been made.

Importing Data:

- Select the 'Upload Files' tab, then click + Add File(s), or Browse.
- Next, select the file you'd like to upload – zipped files are preferred but not required. OnBoard will allow a filename (the file you're importing) of up to 255 characters.
- If this is your first upload for a new product line, you'll need to enter a Product Name, i.e.: OptiCat PIES
  - **NOTE: The Product Name should not include any dates,** so that when you import a new release to that file you can use the same name by selecting it in the drop-down menu.
- Select a Type, such as ACES, PIES, PIES Flat or Other.
- "Other" is for any file that doesn't need to be validated. For example: Images, Word Documents, PDFs, Drawings, Videos, etc.
- Zip Files may not contain additional Zip Files.

- o **If the zip file contains more than one file you will get this error.** We can't validate multiple Aces or Pies zipped together.
- o You may upload multiple files at the same time in separate product files:

- **Optional:** You can add a Comment prior to upload. There is a comment box, enter text here and then when file is saved, the text will be included with data delivery in a .txt file along with the data – i.e. "This is file 1 of 2 for the 3rd quarter update".

- *Save*
- Once uploaded, you will be redirected to the 'Imported Files' tab, and if ACES/PIES type was selected validation will begin. The upload process copies the file from your local machine into a private work space on the OptiCat server.

Replacing a file:

- When doing your update for the product line, you will add the file(s) as directed above, but now, in the 'Replace?' box, use the drop down to select the product file you will be replacing. This will overwrite (replace) the old file so that receivers will only have access to the most current data.

- You can still update the product name. For Example: I am replacing OptiCat PIES 3rd Quarter and have entered a new Product Name of OptiCat PIES 4th Quarter.
- Select Type: ACES, PIES, Other
- Click Save.

Imported Files (Files imported to OnBoard)

- This is where you'll see the status of the import & validation. After the file has been loaded to the OptiCat server, OnBoard automatically begins the process of validating each record within the file. This validation process is based on the AAIA ACES XSD (VCDB) or the PIES XSD (PCDB) delivery specifications.
- Current XSD Version is posted in OnBoard in the Upload File Tab.

- You can see the progress in % Complete Column.
- Once validation is finished, the status will change to Complete or Failed.
- If Auto-publish is checked, the original file will be delivered to receivers whether the status is Complete or Failed.
- Click on the blue circle with the plus sign after the import is completed to view any warnings or errors that may occur:

- Any Warnings/Errors/Schema Errors would be listed under 'Import Messages'
- Warnings and errors are determined by ACES/PIES Delivery Specification provided by AAIA
- Warnings = Optional Field
- Errors = Required Field
- Data with warnings will pass through into the OptiCat Web Catalog, Data with errors will not.
- The parts with warnings will not be imported into the OptiCat data repository, however, since OptiCat forwards the exact file submitted by the supplier to the receiver, they will not be modified or dropped by OptiCat.
- If Auto-publish is not checked, once the import status changes to Complete or Failed, click the blue Publish button up in the top left. This should only be done if this is an established product line and you've already given permission access to receiver(s).
    o Clicking Publish delivers data to the Receivers you have already approved that have 'In Library' status.

Receivers

Once you've imported your file, you can choose the Receivers whom you want to have visibility or have access to your data.

- Status: **"Need Authorization"** means that receiver has no access to data.
- Status: **"Access Requested"** means receiver has requested access to the data, but you have not given it.
- Status: **"Access Authorized"** means that you have given the receiver access, but the receiver has not moved to their data library yet.
- Status: **"In Library"** means that you have given the receiver access to this product line and they have moved it from the DIO Repository to their Data Library. They now have the ability to download manually at anytime. They will also receive new data you publish to this product line. The receiver will be notified by email when you publish new data to this product line.
- Status: **"On Hold"** means that the receiver is not ready to move to their library.
- Status: **"UnWanted"** means you have given a receiver access, but they do not want the data at this time.
- You can use the Filter bar to search by permissions at any time:

- You can make changes to receiver access at any time.
- When a receiver requests access to your product line via OnDemand, you will receive an email and can decide to give access or not.
  - If you uncheck visibility, this will send an email to the receiver letting them know that you've denied access.
- You can Copy, export a CSV, TSV, PSV, or print the receiver status using the buttons at the bottom of the page.
  - This feature is also available in the delivery log tab.

If you click the plus sign in the blue circle to the left of the receiver, it will let you know who has changed the permission status of the product line:

- **Manage**: When you see a receiver with the Manage option, this means they do not manage their own account, delivery is managed by you. If you give access and save the status will go to 'In Library'. Then you will click the manage button an enter credentials that were given to you for the delivery, either FTP or email.

<u>Reports</u>:
- Go to Configure > Receiver Lines Report

- This will allow you to see the status of every product line for every receiver.
  - You can expand the view using the drop down
  - You may search by receiver, product line or status
  - Easily see which receivers are supplier managed
  - You can export as a CSV, TSV, PSV, or print directly from this screen

Product Center:

OnDemand

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To gain access to OptiCat OnDemand, browse to this URL:

http://www.opticatnetwork.com/OnDemand/

Logging in

- Click Sign-In.
- Enter Username & Password, provided to you by OptiCat's support team.

Manage Account:

- Click the down arrow next to your username, then select 'Manage Account'.
- In this screen, managers can create new users and request a reset password link for users, and everyone can update their email preferences:
  - o ***"Delivery Failure"*** Will let you know if we are unable to deliver data to you for any reason
  - o ***"Data Authorization"*** Will let you know that a supplier has given you access to their product lines and it is now time to move it to 'In Library'

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o **_"Data Updated"_** Will let you know that a supplier has updated their data. This is recommended if you are receiving data via FTP; as it will notify you that new data is waiting for you.

Updating Receiver Profile:

- Click the down arrow next to Settings, then click 'Receiver'.
- You can update your company information here at any time.
- If The company name needs to be changed, please contact OptiCat.
- BIO located near the bottom of the page is very important. The text here will be included in Automated Data Request emails that are sent to suppliers. This is also what the supplier will see under your company name in their Receivers Tab. It's a good idea to include information about your company and what you are doing with the supplier's data.
- Always click the blue 'Save' button next to Receiver Setup.

FTP Settings:

- Click on the 'FTP Defaults' drop down:

- This for a default or general FTP that all product lines direct to. If you have subfolders that you want to direct certain product lines data to, we will address that later in the documentation.
- Enter FTP host address and make sure to include Ftp://

- Enter the FTP Username
- Enter the FTP Password
- Always click the blue 'Save' button next to Receiver Setup.

Export Options:

- Here you will find all options that you can select when receiving data via OptiCat.
  - **Files Unzipped** *Files will be delivered unzipped.*
  - **ACES or PIES Originals** *Files will be delivered in original supplier provided format.*
  - **Require BrandAAIAID** *If the ACES file does not include the BrandAAIAID then the file will not be delivered.*
  - **Flats by files** *will convert the XML to a .txt file that you may open in excel as Tab Delimited. Please note that Flat Files exclude Attributes, Interchanges, Digital Assets, etc. To get all PIES segments, please use a Custom Template.*
  - **Custom Templates Enabled** *Allows you to create your own custom PIES template that you'll be shown later in this guide.*
  - **XML 6.5 by product line** *exports PIES version 6.5.*
  - **XML 6.6 by product line** *exports PIES version 6.6.*
  - **XML 6.7 by product line** *exports PIES version 6.7.*
  - **XML 7.0 by product line** *exports PIES version 7.0.*
  - **Require GTIN** *Will only deliver parts with GTIN; it will delete parts without GTIN in the custom file delivered.*
  - **Fix Brand Labels by BrandAAIAID** *Adds Brand Label to the item in PIES from the B20 field.*
  - **AWDA 6.3 by files**
  - **AWDA 6.3 by product line**
  - **AWDA 6.4 by files**

- o **AWDA 6.4 by product line**
- o **AWDA 6.5 by files**
- o **AWDA 6.5 by product line**
- o **AWDA include Header** *the export will include the header*
- o **Other Originals** *Images, Videos, PDFS and unvalidated data will be delivered in the original supplier provided format.*
- If you choose any of the options above, you will receive the data in this format until you change it back.
- Always click the blue 'Save' button next to Receiver Setup.

OnTarget:
- These settings will allow you to get reports from OnTarget, if the supplier is providing them.

Notification Emails:
- o *"Data Authorization"* Will let the company manager know that a supplier has given you access to their product lines and it is now time to move it to 'In Library'
- o *"Data Updated"* Will let the company manager know that a supplier has updated their data. This is recommended if you are receiving data via FTP; as it will notify you that new data is waiting for you.

Image Sync Options:

- Here you can set your format preferences for Image Sync:
  - o We currently offer conversions to: .png, .jpg, .jpeg, .tif, .tiff, .eps, .gif, .bmp
  - o You can set image sizing requirements to a specific height and width
  - o Image renaming allows you to have images renamed by one of the following: File Name, Part Number, BrandAAIAID, or UPC.
- Always click the blue 'Save' button next to Receiver Setup.

Custom PIES Templates:

- Click the down arrow next to Settings, then click 'Templates':
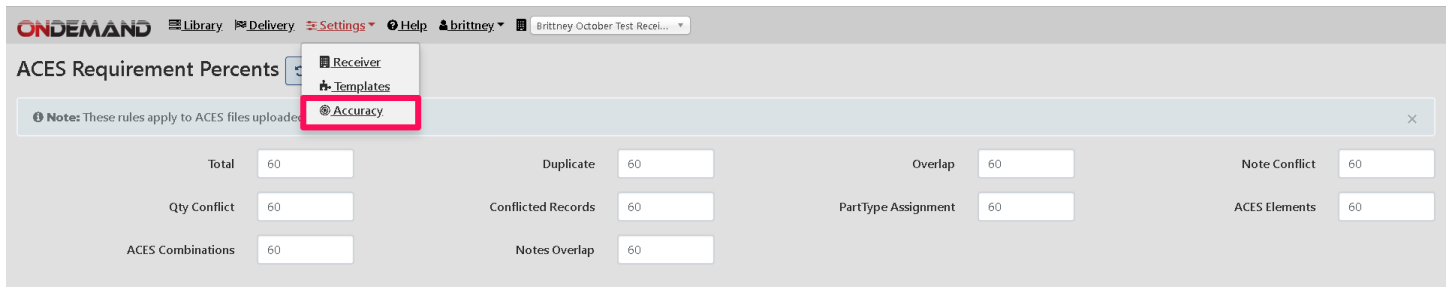
- This is a great option if you don't need an entire PIES file and are only looking for certain fields.
    - If you select all available fields for a flat file, we will export the following with Digital Assets:

- Use the drop down and select 'create new…'.
- Name your template.
- Choose the Type of file you'd like to receive:
    - Can be PIES Flat (.txt file) that you can open in excel as tab delimited.
    - Can be PIES xml versions 6.5, 6.6, 6.7, 7.0, or 7.1.
- Check 'Active'.
    - Note, this will remain active until you uncheck it.
- Select Interchanges, Headers or Descriptive Headers if you would like to receive them.
- Scroll through and select which available fields you would like to include.
    - You may select many fields at once by holding the Ctrl key + clicking on them.
    - Once they are in the Receiving fields section, you can change the order by clicking the up and down arrows under 'Order'.
    - You can use the search bar to find specific fields.
- Always click the blue 'Save' button at the top of the page.

Managing ACES Requirements:

- Click the down arrow next to Settings, then click 'Accuracy'.
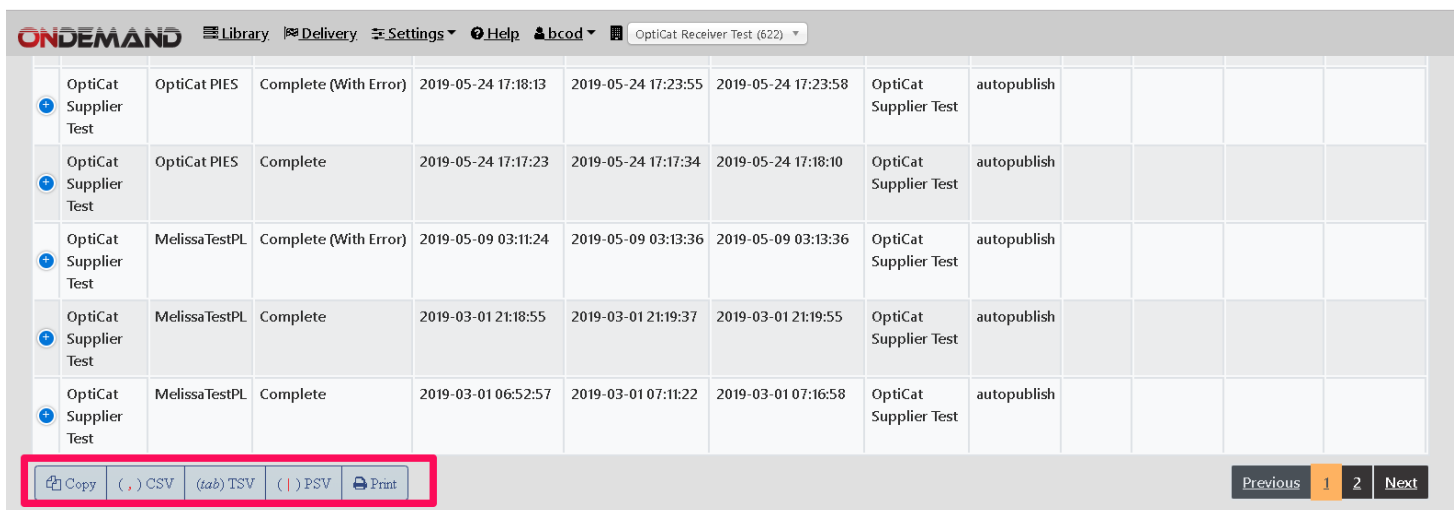
- Specify the accuracy of ACES files that will be delivered to you. This will only apply if the Supplier is using OnTarget to validate and deliver the data to you.
- This will be applied to ACES files only.
  - o This defaults to 60% accuracy

Delivery Report:

- Click on the Delivery tab:

- This section will always give you the status of your exports and let you know if we ever have any issues delivering data. This section will let you know which company initiated the download, the delivery status, requested date, start date, and completion date.
  - o If you encounter a complete (With Error) status, click the blue circle with a + sign next to the product line and you'll see details as to why the error was thrown.
  - o You can copy, export a CSV, TSV, PSV, or print this page using the buttons at the bottom of the screen.

Your Data Library:

- Click on Library.

- This section will always filter by the product lines that have already been moved to 'In Library' status.
    o These are the product lines that are ready to be downloaded at any time.
    o You can remove In Library filter to view all by clicking the X next to In Library.
- If you select a product line then click deliver, the data will go to your dedicated ftp site you have set up in the admin section.
    o Note: if there is not an FTP set up, it will attempt to transfer via email; however, it may not be able to be delivered via email if the file size is too large.
    o If or when a Supplier sets a product line up as "Auto Publish", and they have already given you access to that product line & you've moved it to 'In Library', when they import any new data it will automatically push through to your default delivery destination and if it is pushed to an FTP you will receive an automated email notification from OptiCat letting you know it's waiting for you.

- Click on the Filter bar:

- You can filter by the following:
    o **Need Authorization-** *This means you have not requested to access this product line.*
    o **Access Requested**-*This means you have requested access to the product line, but the supplier has not yet given you permission.*

- **Note:** The Supplier Manager's contact information is provided so that you can reach out to them with questions or if you are waiting on them to grant permission. If you do not see all the contact information, click on the blue plus sign to view.
  - **Access Authorized-** *This means that the supplier has given you permission to access the data and you need to move it to 'In Library' in order to download.*
  - **In Library-** *This means you can download the data and will receive any future updates from the supplier, if they use auto-publish or manually publish.*
  - **Receiver Holding-***This means that you do not want data to be automatically delivered to you at this time.*
    - You may deliver data to yourself while it is in 'Receiver Holding' status. Just highlight the product line by clicking, then select the 'deliver' box.
  - **Receiver Unwanted-***This means that you no longer want the data.*
- You may also search by Supplier Name, Product Line Name, Validation, Manager Name, Phone or Email:

- You can use the arrows next to Supplier to filter from A-Z or Z-A.
- By clicking on the blue circle with the + next to the supplier name, you can see Files with product name and product line permission history:

- In order to request access to a product line, simply click on the product line(s), and click Request Access:

- o This will send an email to the supplier letting them know that you have initiated the handshake.
- o If the supplier agrees to grant access, you will receive an email notification (as long as that preference is set) letting you know you now have access to the product line- completing the handshake.
- o Once authorization is granted, the status changes to 'Access Authorized'. From there you will need to move the product line to your data library:
- o If you have not heard back from a supplier and are still waiting on access to their product lines, you may re-request the data by clicking on the product line and then selecting the request access button again.

- Filter by 'Access Authorized.
- Select product lines.
- Click 'Put in Library (Subscribe)'.
- You may now filter by 'In Library':

- Click on the product lines you want to download, then click Deliver.
  - **Note:** this will deliver to your default FTP or email destination. If you want it to be directed elsewhere, click on a single product line, then click 'Configure Delivery':

- This will allow you to update the delivery preferences for the selected product line(s) only.
  - **Note:** this is where you would enter subfolder information.
  - **Example:** ftp://brittneyFTP/PIES

- After you've entered the destination, always click the blue 'Save' button at the top of the page.
- This is also where you set up your Image Sync destination for applicable Image Sync lines:

- You can copy, export a CSV, TSV, PSV, or print your library and product line status's using the buttons at the bottom of the page:

Library (DIO Data Repository) ⟳ Refresh

Please select the Product Line(s) for options.

👁 | 10 ▼ | 🔍 Search... | ▼ In Library ✕ | | Previous | 1 | Next

	Supplier	Product Line	Status	Publish	Destination	Image Sync	Created (UTC)	Updated (UTC)	Validation	AAIA	Manager	📞 Phone
⊕	OptiCat Supplier Test	Brittney ISS Test	In Library	auto-deliver	default	active	2019-06-05 13:56:03	2019-06-05 14:19:11	OnTarget		Aaron Turpin	(801) 631-1775
⊕	OptiCat Supplier Test	MelissaTestPL	In Library	auto-deliver	imagesync	active	2019-01-25 11:35:09	2019-06-06 22:02:20	OnTarget		Melissa Douthit	(801) 631-1775
⊕	OptiCat Supplier Test	No AutoPublish Test	In Library	click-deliver	default	-	2019-06-05 14:50:09	2019-06-05 14:51:35	OnTarget		Aaron Turpin	(801) 631-1775
⊕	OptiCat Supplier Test	OptiCat PIES	In Library	auto-deliver	bchristensen@opticat.net	-	2018-12-06 20:54:38	2019-05-24 17:18:13	OnTarget		Brittney Christensen	(801) 542-0560

📋 Copy | (,) CSV | (tab) TSV | (|) PSV | 🖨 Print

Previous | 1 | Next

ISS Lite (Image Sync Service):

OptiCat saw the need to simplify how to send and receive images in a more efficient way. Previously a supplier would upload a ".zip" file with all images. Then, if there were any changes made to that file, a new ".zip" file needed to be reloaded, even if the file had only changed by 1image. Image Sync Service (ISS) simplifies how this works. OptiCat takes the supplier's image folder and unzips the images that are then hosted in our FTP. Receivers then set up individual subfolders on their ftp that are dedicated to each line that they want set up for Image Sync. Receivers then do an initial sync to their subfolder to receive all images unzipped. The next time there is an update in accordance with the receiver's sync preferences, we only add the net changes. The receiver is notified of any images that the supplier removed.

ISS Lite vs ISS Regular:

- ISS Regular
    - You store the images on your ftp and OptiCat will add/subtract net changes
    - This requires a large ftp storage space
- ISS Lite
    - You remove the images from your ftp after a sync and store them elsewhere.
    - OptiCat only adds new images and emails you about any deletes.

Features & Facts:

- The initial sync typically takes a longer time than updates, depending on how big the file is. Our ISS feature will save all of the images to your designated FTP folder. The syncs from then on will vary on how many changes were done to that original master file.
- File conversion takes about 1 second per file (per our latest testing).
- ISS allows resizing of the images. The desired width or height can be selected, and the original aspect ratio will be preserved. We recommend a selection of width: 1500 in accordance with the Autocare best practices.
- ISS allows file renaming; this is limited to the data included in the PIES file. All of these settings can be accessed by going to OnDemand>Admin>Manage Image Sync Settings.
- If destination folder does not exist on your FTP server then our system can only create it for you if permissions are allowed.

ISS Setup:

To determine if a product line is available for Image Sync, you will want to look for the 'Available' status:

1. Click on the product line so that it is highlighted orange, then click 'configure delivery'.
2. This will bring you to the 'Data Delivery Preferences' screen
    a. Select 'Image Sync Only' in the Delivery Method dropdown.
    b. Check 'Enabled'.
3. Select a frequency that the sync will run.
    a. Monthly, Quarterly, or Annually.
4. Input your FTP Address, username and password.
    a. Check applicable box(es) that your ftp requires
        i. Use SSL, Use Passive, FTP Exact Directory
5. Check 'Sync Now'. The initial sync will begin.

Full Refresh:

Please contact OptiCat for a full refresh of images.

OnTarget

Overview

    OptiCat's purpose is to provide a turn-keyed, SaaS (Software as a Service) technology suite that enables automotive aftermarket manufacturers to deliver important product data to its distribution channel partners in a one-step (do-it-once), validated (do-it-right) and pervasive (do-it-everywhere) way. OptiCat's primary business strategy is a "self-service" technology model that enables industry partners to share valuable information, via OptiCat Technology Suite. OptiCat is exclusively a technology provider.

To gain access to OnTarget, browse to this URL:

http://www.opticatnetwork.com/OnTarget

You may have to allow access for the download. If your firewall prevents this, please contact OptiCat support.

Logging in

You will log in with your current OnBoard credentials.

Upon installation, current VCDB/PCDB tables will be loaded. VCDB/PCDB dates are displayed in the lower left hand corner, next to Export Results.

Select File:

If you will be uploading the file to OnBoard, you will need to select the Product Line and the Product File Name. If the Product line is new you will need to first import the file into OnBoard

You can choose to run the file against the current VCDB/PCDB or use the File VCDB/PCDB date.

Select discrepancy types you would like.

The first time you run a file, you can skip adding the previous file, and just select continue. Browse to the file you would like to run.

Validation will run, click show detais to see progress.

When Validation is complete, click on View results.
If there was a previous file loaded then you can choose File Comparison Now. If this is the first time then click exit to view results.

In the screen above when you hover over a discrepancy type, a brief definition will appear.

Duplicates: Apps that contain entirely duplicate elements.
Overlaps: Apps with the same part type that both cover the same vehicles in the VCDB and have the same or NO notes.

Overlap w/Notes: Apps with the same part type that both cover the same vehicles in the VCDB but have DIFFERENT notes

Note Conflicts: Apps which hare all elements,but have different notes.

Quantity Conflicts: Apps which share all elements,but have different quantities.

Conflicted Records: Apps that share all elements but have different part numbers.

PartType Assignments: Apps with the same part number, but different part types.

Invalid ACES Elements: Apps which cover No vehicle in the VCDB.

Invalid Combinations: Apps with an element value that does not appear in the VCDB.

N/R Records: Apps that contain an element with an ID of N/R.

When done viewing click exit to go to the actual results.

You can view the app from this page by clicking in the field for Discrepancy Type.
If there was a comparison, app from both files would be shown here.
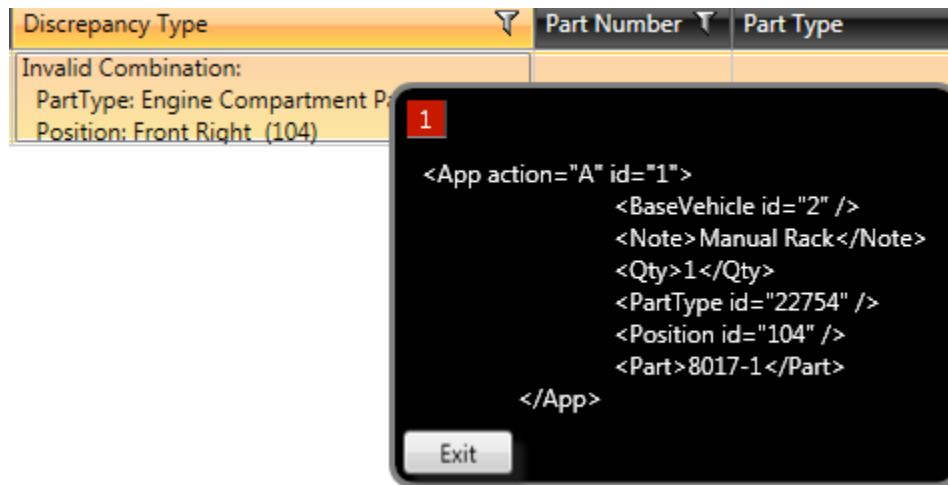
If you would like to export these results in .csv format, you can by selecting export results in the lower right-hand corner.

File Comparison:

Select File. Again, if you are importing this file to OnBoard Select the Product Line and Product File. Select VCDB/PCDB Version. Choose Discrepancies. Then in Previous file select the file you would like to compare to the new one being imported & then choose the additional discrepancies. Continue, to browse to new file.

OnBoard Product Line: OnTarget Test

OnBoard Product File:

VCDB Version:	PCDB Version:
◉ Current VCDB	◉ Current PCDB
● File VCDB	● File PCDB

Find Discrepancy Types:
☑ Duplicates
☑ Overlaps
☑ Overlaps w/Notes
☑ Note Conflicts
☑ Quantity Conflicts
☑ Conflicted Records
☑ Part-Type Assignments
☑ Verify ACES Element Values
☑ Verify ACES Combinations
☑ Validate = No
☑ N/R Records

Previous File: OnTarget_FileCompare_One.xml
☑ Find New/Deleted Apps
☑ Find New/Deleted BaseVehicles
☑ Find New/Deleted Parts
☑ Find New/Deleted Part Types
☑ Find New/Deleted Part/Type Combinations
☑ Find Potential Changes

Utilities:
☑ Build Part-Type/Position List

Cancel   Continue

After file is selected, validation will begin. You can then view the results for the now current file.

File Results

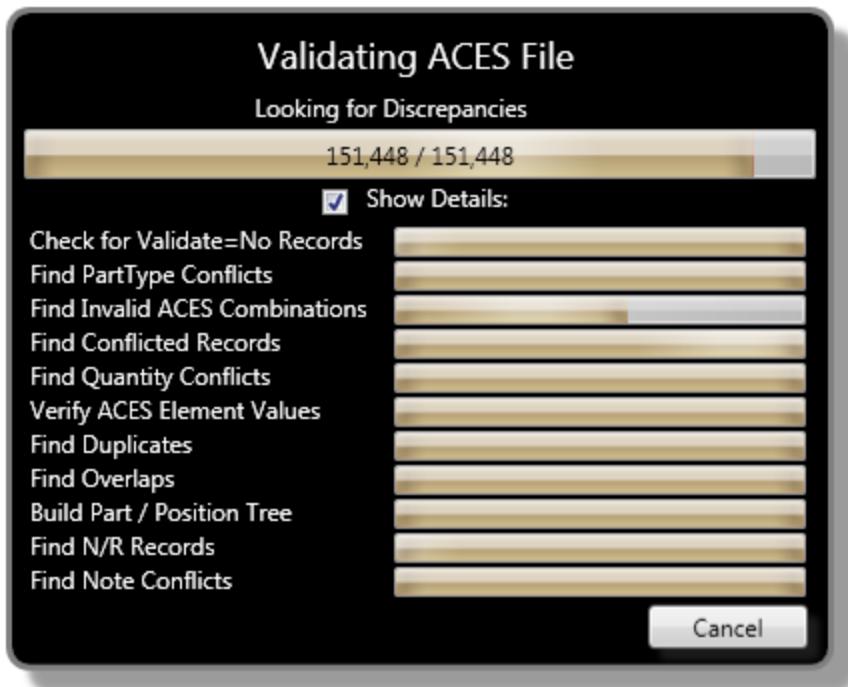| Discrepancy Type	Count	Accuracy
Total Applications:	4	
Current File Discrepancies:	1	75 %
Duplicates:	0	100 %
Overlaps:	0	100 %
Overlap w/Notes:	0	100 %
Note Conflicts:	0	100 %
Quantity Conflicts:	0	100 %
Conflicted Records:	0	100 %
PartType Assignments:	0	100 %
Invalid ACES Elements:	0	100 %
Invalid Combinations:	1	75 %
Validate = No:	0	100 %
N/R Records:	0	100 %

Export To OnBoard   Parts/Positions   File Comparison   Exit

Click File Comparison

File Results

	Count	% Change	Distinct List
Total Applications:	4	-	BaseVehicle BaseVehicle ID Count
Comparison Differences:	15	-	
New Apps:	3	75 %	
Deleted Apps:	3	75 %	
New BaseVehicles:	0	0 %	
Deleted BaseVehicles:	0	0 %	
New Parts:	1	25 %	
Deleted Parts:	1	25 %	
New Part Types:	1	25 %	
Deleted Part Types:	1	25 %	
New Part/Type Combos:	2	50 %	
Deleted Part/Type Combos:	2	50 %	
Potential Changes:	1	25 %	

Discrepancy View   Export List   Exit

New Apps: An app that did not appear in the previous file.
Deleted Apps: An app that appeared in the previous file, but not in this one.
New Base Vehicles: An App with a BaseVehicle which did not appear in the previous file.
Deleted Base Vehicles: An App with a BaseVehicle which appeared in the previous file, but not in this one.
New Parts: An App for a part which did not appear in the previous file.
Deleted Parts: An App for a part which appeared in the previous file, but not this one.
New Part Types: An App with a part type which did not appear in the previous file.

Deleted Part Types: An App with a part type which appeared in the previous file, but not in this one.
New Part/Type Combos: An App with a Part/PartType combination which did not appear in the previous file.
Deleted Part/Type Combos: An App with a Part/PartType combination which appeared in the previous file, but not this one.
Potential Changes: Build a list of Apps that appear to be changes.

Research:
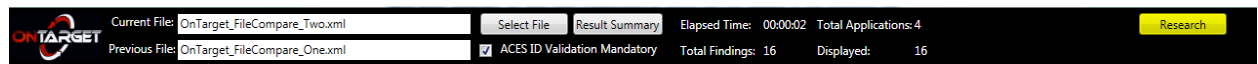
With the research tool you have the ability to select an ACES or PIES file & search with in the file or, if you do not select a file you can get the Base Vehicle ID.
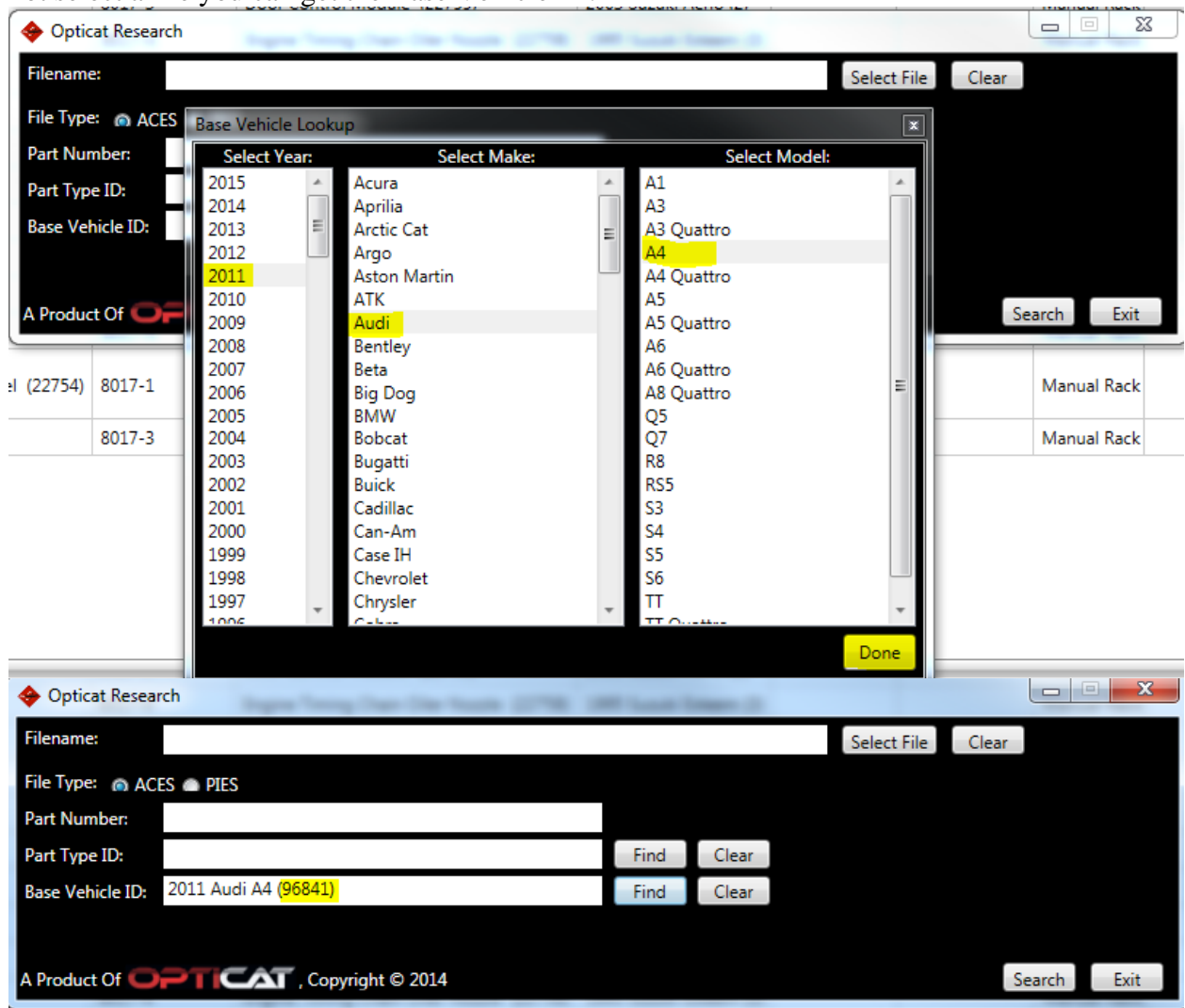
Assessments:

To deliver Assessments & Net Changes you will need to click on Export to OnBoard.
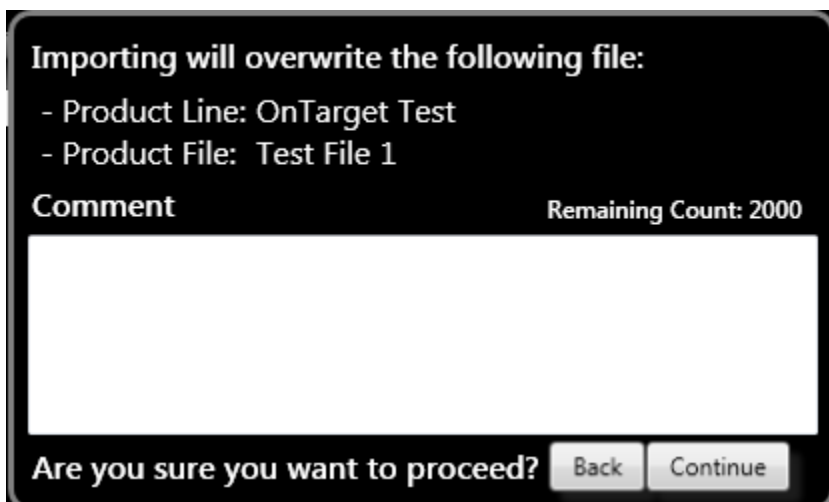
Approve Each Assessment
- Accept and make a comment if you would like.
- If you do not accept the assessment note, it will show False in the report instead of True.
- Right click to save comments all the way down, also you can right click in the accept column to select all the way down the list.
- When you select continue, be sure the Product Line & Product File are the correct location you want the file to be uploaded to in OnBoard.
- Feel free to add comments (sent as a text document)

- Continue.

Your file will now be loaded into OnBoard.

If your product line is marked Auto-Publish it will automatically be sent to your Receivers with the In Library status.

Private Label Generation:

The feature was implemented to help clients sell parts under their own code/part number. This feature is in OnTarget, when you choose a PIES file and export it to OnBoard OnTarget will give you the option to include a mapping file.

Steps to follow:

1. Load Master ACES/PIES file to OnBoard, note Product Line
2. Create a new PRIVATE Product Line (use name in mapping file)
3. Open OnTarget, select master file to noted Product Line
4. Validate
5. Export to OnBoard
6. Provide Private Label Map

You may select to change your header values for new generated file.

7. Save & Continue, this will export it to OnBoard

You can create your private label or mapping file in Excel. The process to generate private labels are simple but rules do apply.

Current Private Label Generation rules:

1. The following header values will be considered part columns:
   a. Part
   b. Part number
   c. Part #
2. Spaces and case are disregarded, so "Part Number", "part number", and "Partnumber" would all work.

3. One column containing JUST one of the values from point 1 must be present and will be considered the "source" part number.

4. Any other column will be parsed using the following format "<company name> part number"
   a. Example: TestCompany part number
5. A file will be created for each of the columns from point 4.
6. When uploading the file, we will look for a product line with the name of the company and the term "ACES" or "PIES" in it.
   a. Example: A product line named "TestCompany – ACES" would match the item from example 4
7. When a product line is found, we will look for the following product file:
   a. A product file of type ACES
   b. A product file of type OTHER, and with ACES in its name.
8. If multiple matches are made for either product line or product file, a match will not be made.

	A	B	C	D	E
1	PartNumber	TestCompany partnumber			
2	1340000	BW102			
3	1340001	BW105			
4	1330001	BW106			
5	1340004	BW111			
6	1340005	BW112			
7					
8					

On Target Header determination:

For example, let's say these are the headers:

"MM Part, Part number, bowers part#"

	A	B	C	D	E
1	MM Part	Part Number	Bowers part#		
2	MM102	1340000	BW102		
3	MM105	1340001	BW105		
4	MM106	1330001	BW106		
5	MM111	1340004	BW111		
6	MM112	1340005	BW112		
7					
8					

OnTarget will determine the following:

1. Column 2 (Part Number) is the source column and has part numbers matching the source ACES/PIES file (original xml).
2. We need 2 generate 2 documents, one for the receiver "MM", and one for the receiver "bowers"
3. Upon uploading the files, the following would happen:
   a. OnTarget will look for a product line with a name containing MM and ACES/PIES, depending on the file.
      i. Upon finding it, it will look for 1 product file of type ACES or of type Other with ACES in its name.
   b. OnTarget will look for a product line with a name containing bowers and ACES/PIES
      i. Upon finding it, it will look for 1 product file of type ACES or of type Other with ACES in its name.
4. OnTarget will then report back what determinations were made.

New Features:

We have added the ability to change BrandAAIAID, Brand and BrandID as of now, we will add more eventually or if requested by clients.

	A	B	C	D	E
1	MM Part	Part Number	Bowers part#	MM brandaaiaid	
2	MM102	1340000	BW102	GL505	
3	MM105	1340001	BW105	GL506	
4	MM106	1330001	BW106	GL507	
5	MM111	1340004	BW111	GL508	
6	MM112	1340005	BW112	GL509	
7					
8					

The same rules apply to the new columns; you can revisit these rules here.

Subsets:

Not Published yet.

PIES Enhanced Validation in OnTarget

- PIES ENHANCED VALIDATION
  - Performs schema validation
  - Validates the PIES filename
- ITEM SEGMENT
  - Validates part number length
  - Validates part number characters
  - Validates Hazardous Material Code
  - Validates Part Terminology in relation to zeros
 - Validates Quantity Per Application Qualifier

- DESCRIPTION SEGMENT
  - Validates mandatory description codes
  - Checks for invalid description codes
  - Checks for invalid description data
- EXPI, DIGITAL ASSETS AND PRICING SEGMENT
  - Validates MSR and MSD in EXPI when Hazardous Material Code is Y
  - Validates mandatory EXPI codes
  - Validates Non-palletized codes
  - Checks for invalid EXPI codes
  - Checks for core in EXPI with CRG and ZZ1 price types
  - Validates price UOMs
  - Validates price types
  - Checks for mandatory price types
  - Validates digital asset filenames
  - Checks for mandatory digital asset fields
  - Validates digital asset data
  - Validates primary digital asset type fields
  - Validates front orientation view
  - Validates asset dimensions
  - Validates orientation view if file is non-image
  - Validates file extension
- PRODUCT ATTRIBUTE SEGMENT
  - Validates mandatory attribute ids
  - Validates AAP_UDA_33 data.
  - Checks for invalid product attribute values
- PACKAGE SEGMENT
  - Check valid UOM codes
  - Verifies package level GTIN for EA
  - Verifies package GTIN or bar code characters
  - Validates GTIN characters
  - Validates dimensions UOM
  - Validates weight UOM
  - Validates mandatory and unique EA
  - Validates inner pack and case
  - Validates cubic volume and cubic weight against EA
- PART INTERCHANGE SEGMENT
  - Validates maintenance type
- TRAILER SEGMENT
  - Verifies correct item count

Common Warnings

- The 'Transfer Date' element is invalid or the 'Effective Date' element is in valid. The proper format is yyyy-mm-dd (a dash not slashes).
- The element 'Header' has invalid child element 'PcdbVersionDate'. List of possible elements expected: 'QdbVersionDate'. Anytime you see the word "Child" it is indicating that the items are not in the proper

sequence. Swap the pcdbVersionDate with the QdbVersionDate. Also, even if you do not use the QdbVersion date it should be populated with something.

ISS – Image Sync Service:
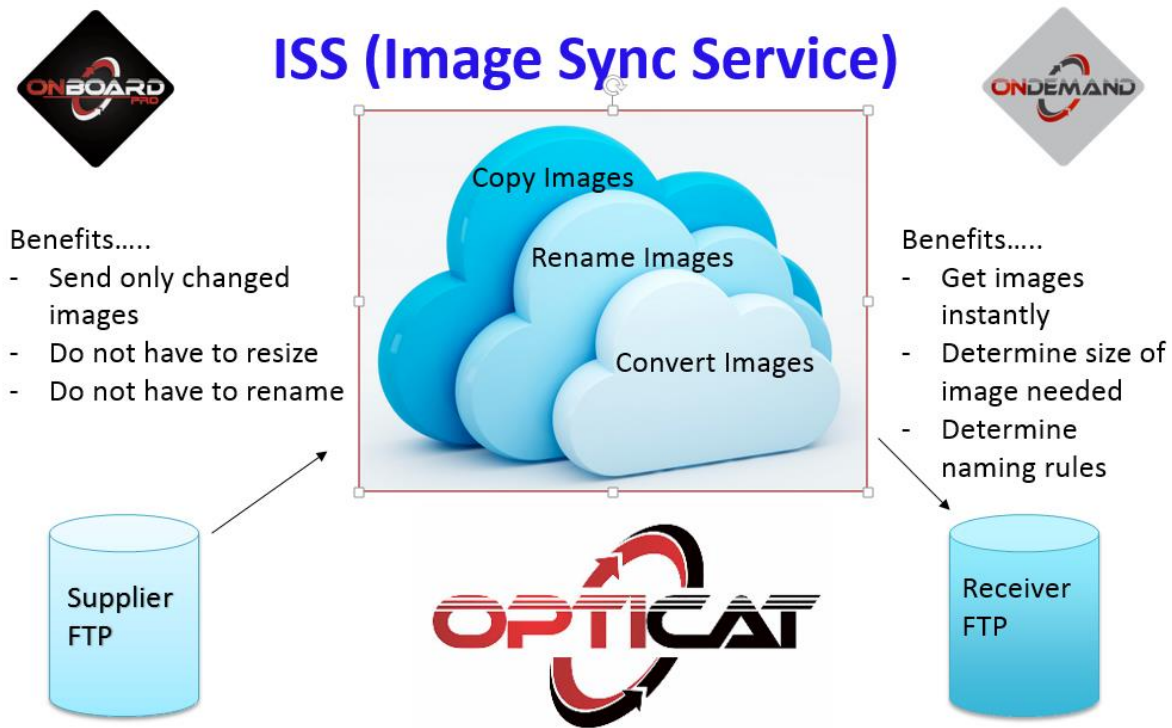
Assessments:

OnTarget Pro Assessment

Adds XML

Net Change
Data Optional

```
</App>
<App action="A" id="2">
    <BaseVehicle id="3803"/>
    <FuelType id="6"/>
    <BedLength id="16"/>
    <Note>25 Gallon</Note>
    <Qty>1</Qty>
    <PartType id="6268"/>
    <Part>FLGM23B</Part>
</App>
```

Deletes XML

```
<App action="D" id="1">
    <BaseVehicle id="3046"/>
    <FuelType id="6"/>
    <BedLength id="15"/>
    <Note>25 Gallon</Note>
    <Qty>1</Qty>
    <PartType id="6268"/>
    <Part>FLGM23B</Part>
</App>
```

This feature is now available.

ACES File Comparison:

OnTarget Pro ACES File Comparison

- Supplier's are be able to avoid the risk of accidently delivering data where hundreds of applications have been mistakenly dropped
- Designed to build trust between you and your receivers

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Help you Sell More Parts!

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The OptiCat Promise: "We will make data work for you, by helping you shape the future of your data technology!"

Supplier Tests
Data Until Clean
and Accurate

Communicating
with OptiCat Data
Repository

OC Data
Repository;
Hosting
Customer
& Supplier
Data

Customers

Data is Ready

OnTarget Pro Features & Benefits

- Enhanced ACES Validation
  - Clean Data
- ACES File Comparison Including:
  Dropped and Added Parts and Vehicles
  - Assessment Process
  - Reduced Assessment Time
  - No Lost Data
- Receiver Requirements
  - Passes Receiver Validation

OnBoard Pro Features & Benefits

- Data Validation and Authorized
  Distribution
  - Consistency & Security
  - Accuracy
- Efficient Data Delivery Including
  OnMail
  - Speed to Market
- Product Information and PIES
  Conversion
  - Data Delivery Flexibility

OnDemand Features & Benefits

- Data Receiver Management
  - Fast, Efficient Data Delivery
- PIES & AWDA Exports & Conversions
  - Custom Receiver Fields, Formats &
Rules
  - Specified ACES File Quality
  - Eliminate Custom Content Delivery
  - Customer Data Rules and Validation

OnLine Features & Benefits

- Supplier approved OnLine
  Parts Research Catalog visible
  to market in "near real time"
  - Freshest Data
  - Clean Data
  - All the Data
- Web Services