



Profile 2
Catalogue with Updates

Version 1.0



NES PROFILE
Catalogue with Updates

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1 profile ID

urn:www.nesubl.eu:profiles:profile2:ver1.0

2 context

This profile applies to:

- all NES countries
- Customer and Supplier organisations of all sizes
- Customer and Supplier organisations in all sectors, public and private
- all types of goods and services

3 summary

Subject:

- Catalogue provision and update
- update of Item specification without updating Item pricing information
- update of Item pricing information without updating Item specification
- Catalogue acceptance and rejection

Exclusions:

- tendering

Requirements:

- the Catalogue may only apply to one Customer or all Customers
- the Catalogue must contain all information necessary for its use
- Catalogue acceptance and rejection applies to the whole document

Aims:

- systemised provision of Item and pricing information
- reduced errors in Ordering and Invoicing

4 description

This profile describes a process comprising an electronic Catalogue, Catalogue Item Specification Update and Catalogue Pricing Update. It allows a Supplier (or third party acting on a Supplier's behalf – Provider) to send a Customer (or third party acting on a Customer's behalf – Receiver) a Catalogue describing items (goods or services) available for purchase.



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This profile allows the Catalogue document to update an existing Catalogue by replacing entire Catalogue Lines. In this case, the Catalogue document will contain only the Catalogue Lines that are to be added, deleted and/or updated. To facilitate this usage, the Catalogue Line contains an action code describing how the recipient should process the Catalogue Line.

This profile specifically allows only item specifications (not prices) to be updated in isolation via a Catalogue Item Specification Update document and prices (not item specifications) to be updated in isolation via a Catalogue Pricing Update document.

If a contract between the Customer and the Supplier exists, its terms overrule those stated in the Catalogue.

Note: the update of an item specification and price requires a Catalogue document with an 'update' action code on the relevant Catalogue Line.

This process is intended to result in acceptance or rejection of the Catalogue or Catalogue update document in full by the use of a business level Application Response.

Documents included in this profile:

- Catalogue
- Catalogue Item Specification Update
- Catalogue Pricing Update
- Application Response

5 profile scenarios

1. accepted Catalogue
2. rejected Catalogue
3. accepted Catalogue Item Specification Update
4. rejected Catalogue Item Specification Update
5. accepted Catalogue Pricing Update
6. rejected Catalogue Pricing Update

6 business requirements

1. the Provider sends an electronic Catalogue or Catalogue update document that can be received and processed by the Receiver
2. the Catalogue or Catalogue update document must contain all information necessary for its use i.e. it shall not rely on the



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availability of external references such as a centralised repository of product information

3. the Catalogue or Catalogue update document must support:
 - integrity, authentication and auditing of information content
 - item price comparison
 - specification of:
 - item components
 - item accessories
 - required (additional) items
 - replacement items
 - complementary items
 - seasonal pricing of the same item by specifying different prices depending on specific validity periods
 - specification of the type of tax applicable to an item in a specific location
 - identification of items by specification of their attributes and dimensions
 - identification of item instances

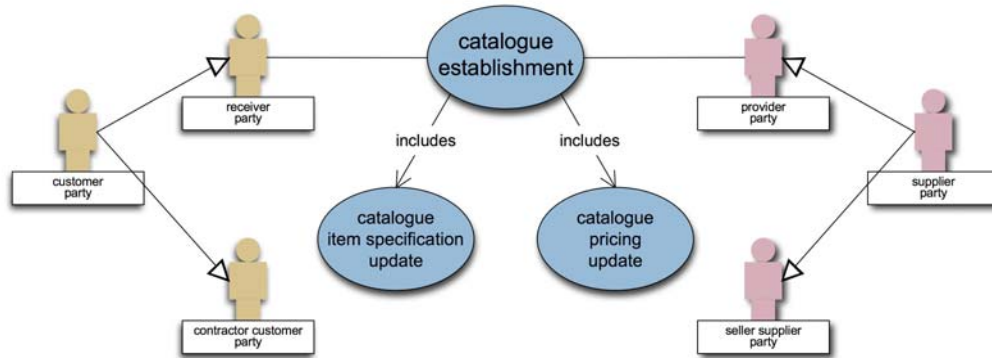
7 business benefits

aspect	beneficiary	benefit
systemised content	Customer	<ul style="list-style-type: none">• quick and easy comparison of items from different Suppliers• simple storage and automated maintenance of item information• correct identification and pricing of items in the Ordering process (reduced errors)
Customer relations	Supplier	<ul style="list-style-type: none">• provision of tailored item and price information.• correct identification and pricing of items in the Ordering process (reduced errors)

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8 use case diagram



9 actors involved in the process

party	role	comments
<i>Supplier</i>	Provider	The Party providing the Catalogue or Catalogue update document. The Provider Party can be the Supplier or a third party managing the Catalogue on the Supplier's behalf.
<i>Customer</i>	Receiver	The Party receiving the Catalogue or Catalogue update document. The Receiver Party can be the Customer or, for example, a portal or marketplace hosting or managing the Catalogue on the Customer's behalf.
Customer	Contractor	The Party responsible for the contract to which the Catalogue or Catalogue update document relates. If the Receiver Party is not the party eventually buying the items in the Catalogue, it is possible to specify Contractor Customer Party. If the Catalogue is not available to all Customers, a specific Contractor Customer Party must be specified at Catalogue document level only i.e. the Catalogue cannot apply to a group of Customers. Also known as Purchasing Manager.
Supplier	Seller	The Party responsible for handling Buyer services.



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9 actors involved in the process

party	role	comments
		<p>If the Provider Party is not the seller of the products, it is possible to specify Seller Supplier Party.</p> <p>The Seller Supplier Party may be specified at either Catalogue document level (single Supplier Catalogue) or at Catalogue Line level (multi Supplier Catalogue).</p> <p>The Seller Supplier Party is legally responsible for providing the goods and services to the Customer.</p> <p>Also known as Sales Point, Provider, Customer Manager.</p>



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10 process parameters

business rules

- | | |
|----------------|---|
| document level | <ol style="list-style-type: none">1. prices expressed in a Catalogue or Catalogue Pricing Update must apply to one specific Customer or to all Customers (a general Catalogue)2. a Catalogue without a stated validity period is assumed to have unlimited validity3. acceptance and rejection apply to the entire Catalogue (including additions, updates and deletions) or Catalogue update document |
| line level | <ol style="list-style-type: none">1. all Catalogue Lines must contain an item (goods or service) with an identifier2. all Catalogue Lines must contain an action code specifying whether the recipient should 'add', 'update' or 'delete' the Catalogue Line; on initial transmission, all Catalogue Lines should be set to 'add'3. Catalogue Update Lines must specify the Line in the original Catalogue that they refer to4. Catalogue Item Specification Update overwrites all item specification information on the relevant Catalogue Line5. Catalogue Pricing Update overwrites all price information on the relevant Catalogue Line6. all items must have an order unit and a price per unit (cannot be updated using Catalogue Item Specification Update)7. although items may be classified by a number of schemes, one of the item classifiers must be UN/SPSC for all items (cannot be updated using Catalogue Pricing Update). UNSPSC is the United Nations Standard Products and Services Code; a hierarchical classification system for goods and services managed by GS1 US, formerly the Uniform Code Council (UCC)8. hazardous item information must be provided if the item is indicated as being hazardous |



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Catalogue with Updates

exceptions

1. electronic tendering is out of scope of this profile
2. Catalogue negotiation, request and deletion processes are external
3. the Catalogue and Catalogue Pricing Update cannot be used to express different prices for a specific group of Customers
4. maintenance of historical information regarding updated and deleted items is out of scope of the Catalogue and Catalogue update documents

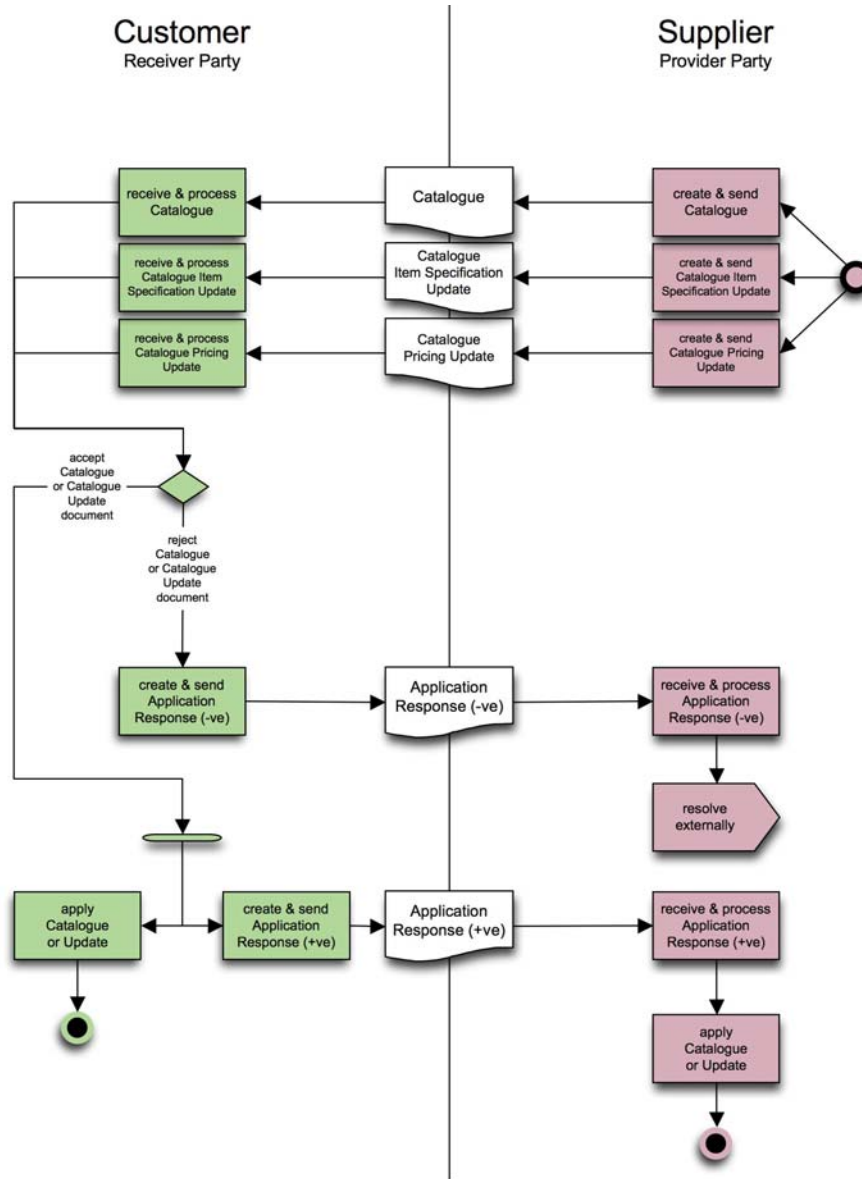
pre-conditions

1. the Provider and the Receiver have identified each other
2. a Catalogue must be in existence prior to use of Catalogue update documents
3. the Receiver has agreed to accept electronic Catalogues and Catalogue update documents that use the profile

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11 activity diagram



12 activity description

role/party	activity	description
Provider <i>Supplier</i>	create and send Catalogue	Provider Party creates and sends a Catalogue or Catalogue update document to Receiver Party.



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Receiver <i>Customer</i>	receive and process Catalogue	Receiver Party receives and processes the Catalogue or Catalogue update document.
Receiver <i>Customer</i>	accept or reject Catalogue	Receiver Party accepts or rejects the Catalogue or Catalogue update document in full.
Receiver <i>Customer</i>	accept Catalogue send Application Response	Business level acceptance results in Receiver's sending Provider a positive Application Response.
Receiver <i>Customer</i>	apply Catalogue	On sending a positive Application Response, Receiver applies the Catalogue or Catalogue update document (makes it available for trade).
Provider <i>Supplier</i>	receive and process Application Response	Provider Party receives and processes positive Application Response.
Provider <i>Supplier</i>	apply Catalogue	On receipt of a positive Application Response, Provider applies the Catalogue or Catalogue update document (makes it available for trade).
Receiver <i>Customer</i>	Reject Catalogue send Application Response	Business level rejection results in Receiver's sending Provider a negative Application Response.
Provider <i>Supplier</i>	receive and process Application Response	Provider Party receives and processes negative Application Response.
Provider <i>Supplier</i>	resolve externally	On receipt of a negative Application Response, Provider resorts to an external resolution process.

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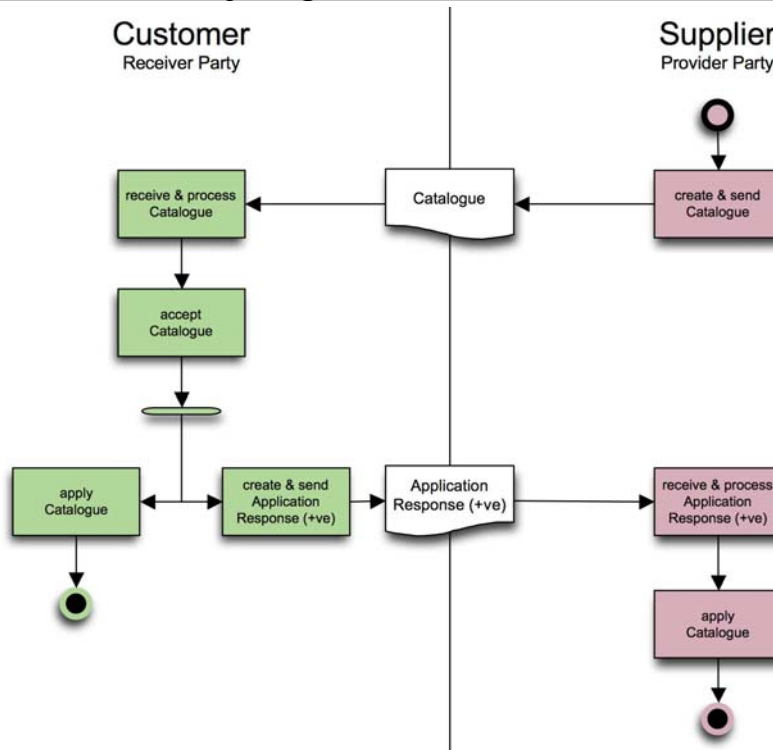
Catalogue with Updates

13 scenario 1

name accepted Catalogue

description In this scenario the Receiver accepts the Catalogue.

13.1 scenario 1 activity diagram



13.2 scenario 1 runtime business rules

1. the Receiver accepts the Catalogue in full and sends a positive Application Response to the Provider

13.3 scenario 1 post-conditions

1. the Catalogue is made available for trade by the Receiver and the Provider (Customer and Supplier)

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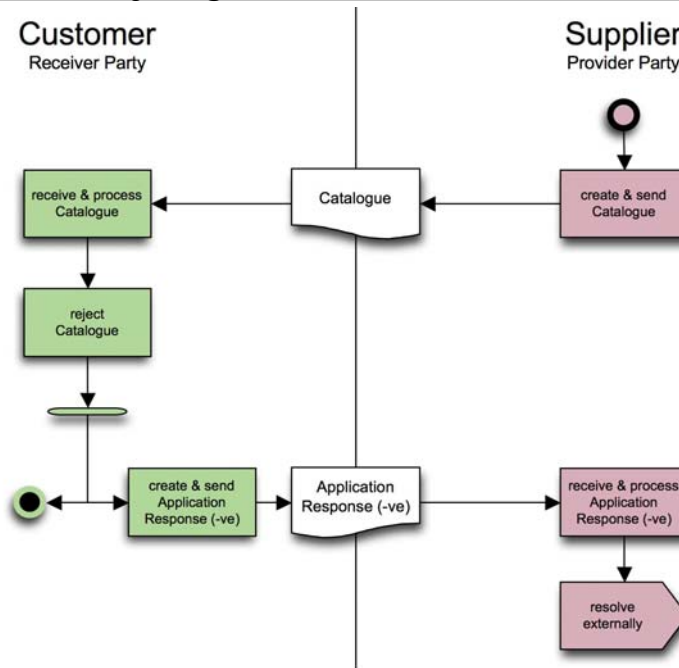
Catalogue with Updates

14 scenario 2

name rejected Catalogue

description In this scenario the Receiver rejects the Catalogue.

14.1 scenario 2 activity diagram



14.2 scenario 2 runtime business rules

1. the Receiver rejects the Catalogue in full and sends a negative Application Response to the Provider

14.3 scenario 2 post-conditions

1. the Catalogue is not made available for trade; resolution is external

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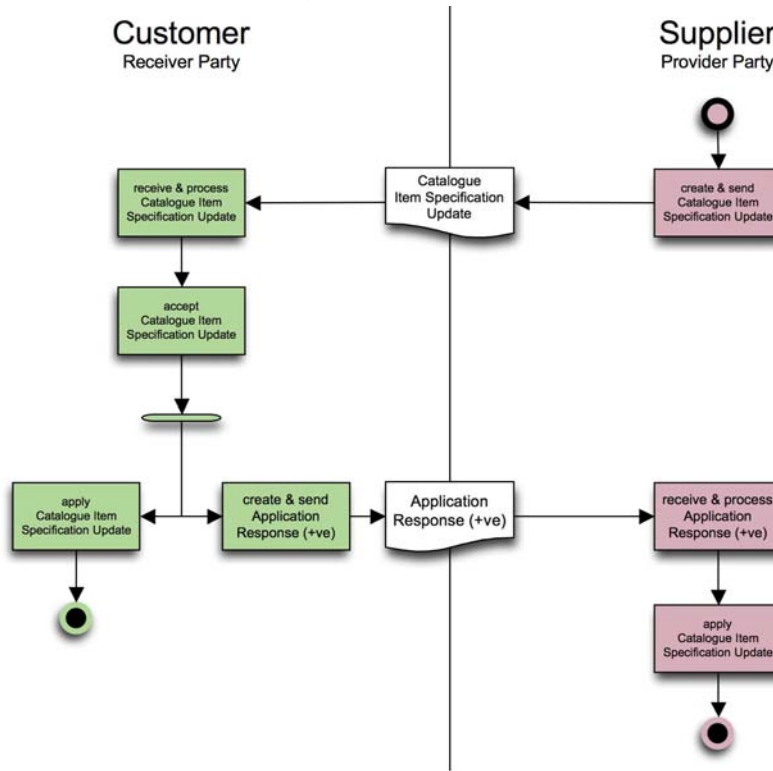
Catalogue with Updates

15 scenario 3

name accepted Catalogue Item Specification Update

description In this scenario the Receiver accepts the Catalogue Item Specification Update.

15.1 scenario 3 activity diagram



15.2 scenario 3 runtime business rules

1. the Receiver accepts the Catalogue Item Specification Update in full and sends a positive Application Response to the Provider

15.3 scenario 3 post-conditions

1. the updated Catalogue items are made available for trade by the Receiver and the Provider (Customer and Supplier)

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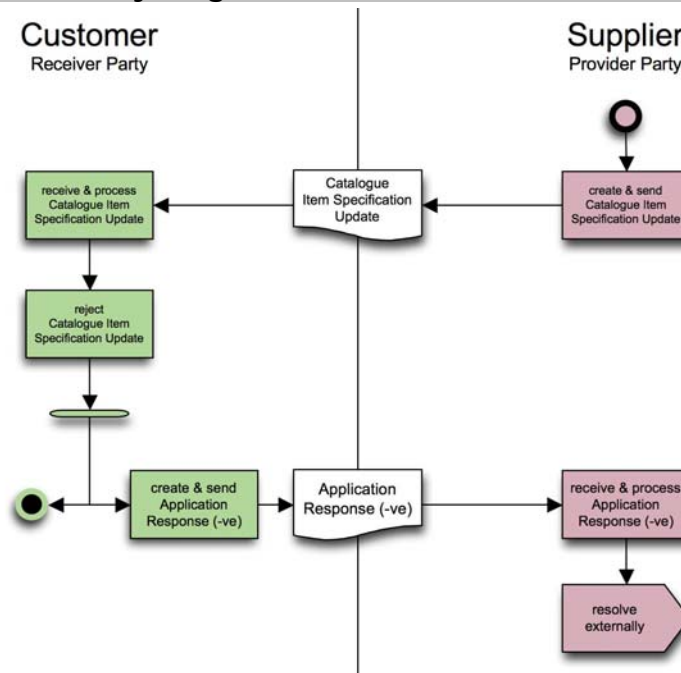
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16 scenario 4

name rejected Catalogue Item Specification Update

description In this scenario the Receiver rejects the Catalogue Item Specification Update.

16.1 scenario 4 activity diagram



16.2 scenario 4 runtime business rules

1. the Receiver rejects the Catalogue Item Specification Update in full and sends a negative Application Response to the Provider

16.3 scenario 4 post-conditions

1. the updated Catalogue Items are not made available for trade; resolution is external

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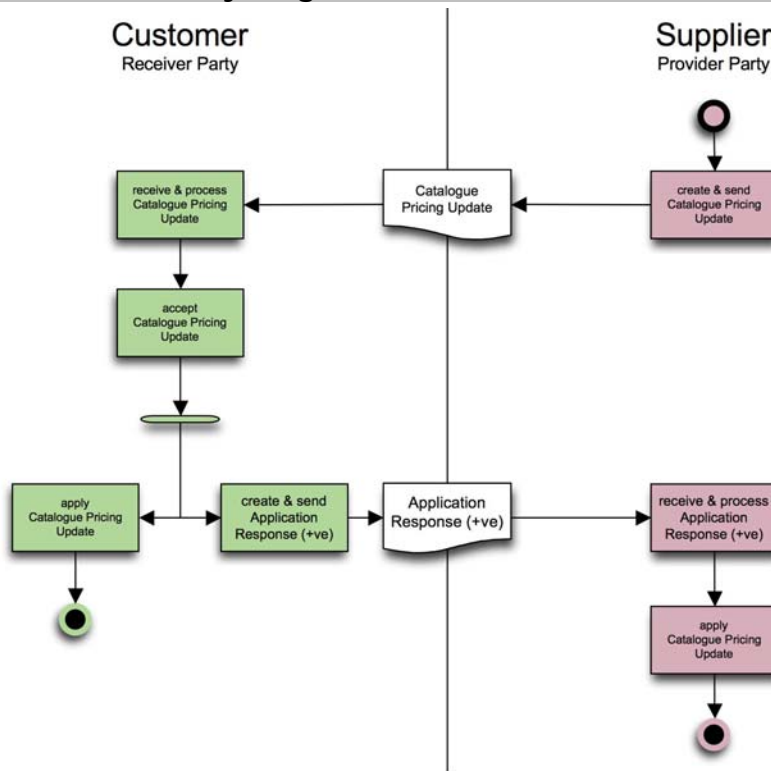
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17 scenario 5

name accepted Catalogue Pricing Update

description In this scenario the Receiver accepts the Catalogue Pricing Update.

17.1 scenario 5 activity diagram



17.2 scenario 5 runtime business rules

1. the Receiver accepts the Catalogue Pricing Update in full and sends a positive Application Response to the Provider

17.3 scenario 5 post-conditions

1. the updated Catalogue prices are made available for trade by the Receiver and the Provider (Customer and Supplier)

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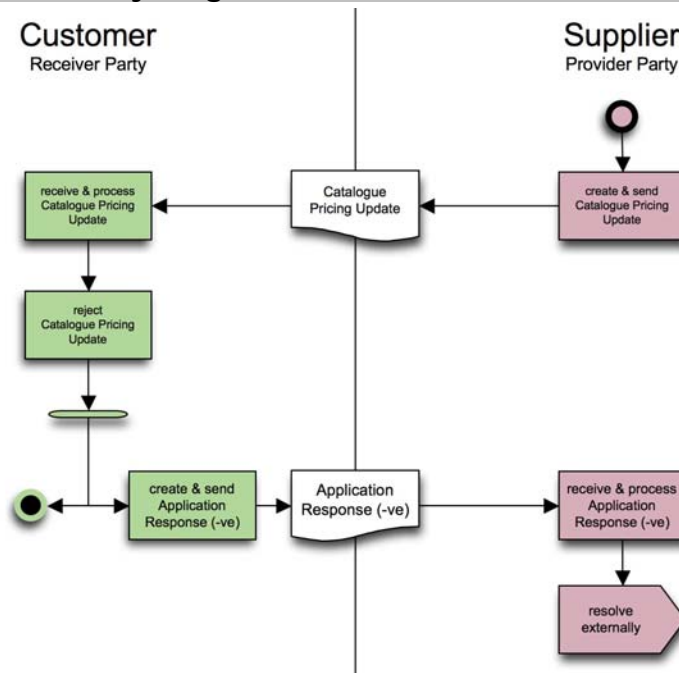
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18 scenario 6

name rejected Catalogue Pricing Update

description In this scenario the Receiver rejects the Catalogue Pricing Update.

18.1 scenario 6 activity diagram



18.2 scenario 6 runtime business rules

1. the Receiver rejects the Catalogue Pricing Update in full and sends a negative Application Response to the Provider

18.3 scenario 6 post-conditions

1. the updated Catalogue prices are not made available for trade; resolution is external