



The Global Language of Business

# Data Recipient User Guide

For TrueSource™ Dashboard powered by ECCnet

*Version 2.8*



## Data Recipient User Guide

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## Introduction

TrueSource™ Dashboard is a standardized industry Data Excellence tool that provides visibility to the status of your product content across multiple business processes and trading partner requirements.

This guide describes functions that you can perform using TrueSource™ Dashboard powered by ECCnet.

Topics covered are:

- Log In
- Overview of the Workspace
- Search Products
- Using TrueSource™ Dashboard
- Sorting and Filtering a Table
- Extracting Report Details

## Log In

To log into TrueSource™ Dashboard, you require a valid email address and password. After you successfully subscribe to GS1 Canada and register for TrueSource™ Dashboard, you will receive instructions to complete the registration.

Steps:

1. To open the login page, go to <https://www.gs1ca.org/login.asp?>.
2. Enter your email address and password.

If you have forgotten your password, click Forgot Your Password and follow the instructions.

3. Click Login.

After you log into myGS1, your landing page appears.

If you have access to multiple companies or company divisions, you must select a company from the drop-down list.

After you have selected a company or company division, or if you have access to only one company, the myGS1 Home page appears.

The My Tools panel displays a link to each GS1 Canada tool to which your company is registered.

To open the Dashboard tool, click TrueSource™ Dashboard.

The Home page appears.

## Overview of the Workspace

The Home page for data recipients shows the page title Multiple Trading Partner Analysis by Business Process Management with pie chart reports for business processes across all trading partners.

When a trading partner is promoted to TrueSource™ Dashboard, your organization is measured on each business process that your trading partner supports. A business process is a collection of data from related key performance indicators that represent the performance of a specific service or business goal.

For a detailed description of how to use these reports, see “Using TrueSource™ Dashboard” ([page 9](#)).

## Other Workspace Areas

Besides the Home page, the following areas appear and remain visible while you are in TrueSource™ Dashboard:

- Option
- User Information
- myGS1
- Search bar
- Export
- Sidebar

### Select a Trading Partner

This field appears on the right side of the banner, to the left of Option ()

If you have access to a single company, that company name appears in this box.

If you are overseeing two or more companies, for example multiple branches or multiple franchise locations, you can click this box and choose a different company name.

For information about how you can get access to two or more companies,

### Option

In the upper right corner of the page, click Option () to view a drop-down menu with the following links:

- Contact Us
- Help Menu

## User Information

In the upper right corner of the page, click User Information () to view a drop-down menu with the following information:

- Your name
- Login email address
- User permission role

## Language Option

To display the user interface in another language, above User Information, click the language name.

## myGS1

Click this button to log out of the service and open the myGS1 page.

## Search Bar

At the top of the page, a search bar will help you quickly find a single product or a group of products.

The search bar is always visible and enabled.

1. To specify an attribute value to search, in All, select an attribute:
  - GLN
  - GTIN
  - Product Description

To search all three attributes, select All.

Note: If you are in the middle of a search and you change the search attribute, all search parameters are reset.

2. In the text box, specify a search pattern.

You can use alphanumeric characters to create a pattern. For example, if you are searching for a GTIN, enter a series of numbers.

To display all products in the system, click in the text box and do not add a pattern.

3. To take advantage of the search filter function, do the following:
  - a. In the text box enter a minimum of six digits or six characters.

A search-filter list of products matching the pattern appears below the text box as a drop-down.

For example, if you are searching for product from a specific Global Location Number (GLN), enter a minimum of six digits for that GLN in the text box. The

drop-down shows all GLNs that match the pattern along with the company name.

If you are searching GTINs, the six-digit pattern shows a list of all GTINs that match the pattern. The company name and the product name appear along with the GTIN.

- b. Select a matching item from the drop-down list.
- c. The Search Results table shows products that are related to the item that you selected in step (b).

For example, if you are searching for a specific GLN, by clicking one company name in the list, the search results table shows only those product for the selected company.

If you are searching GTINs, when you select a GTIN from the list, the search result table shows only the selected GTIN.

4. Click Search (  ).

All products that match the search pattern appear in the Search Results table.

### **Search Results Table**

Commands at the top of the search results table can help you view or scan the list of matching products in the list:

- To display more or fewer items on a single page, select the number of items to show.
- If the results list is multiple pages, use the page navigation controls to jump to the next, previous, first or last page.

The search results table shows a line for each GTIN.

To help find a specific product in the search results table, you can change how the table is displayed:

- To sort the table by a column, click the column header.
- To sort the table in reverse order, click the column header a second time.

In the search results table, GTINs are associated with a trading partner name. If a product is associated with multiple trading partners, a plus sign (+) appears to the left of the GTIN. To open a GTIN and view the list of trading partners, click the plus sign.

### **Export**

You can capture a screen shot of the current layout as a picture to either Microsoft Excel or PDF format.

To capture the screen shot, choose the format and click Export.

## Sidebar

There is a sidebar on the left side of the page that contains several icons. When you hover your mouse pointer over an icon, a list of link options appears on a slide-out panel.

The icons that appear in the sidebar are:

- Dashboard - Return to the Home page.
- Reports - Select a report from the slide-out panel.

## Using TrueSource™ Dashboard

When you log in to TrueSource™ Dashboard, you see business processes for all trading partners, also known as the Home page. To return to the Home page from anywhere in the application, in the sidebar, click Dashboard.

The Home page displays a number of pie charts that show business process engagement scores across all trading partners.

The visuals that appear in this view can include the following, depending on your trading partner relationship:

- New Item Setup – Engagement levels for all trading partners showing whether or not their GTINs are in ECCnet Registry. The GTIN Discrepancy button appears here.
- Pharmaceutical Content - Engagement levels for all trading partners showing the status of pharmaceutical content certification. Status levels are:
  - Certified - Percentage of products that have completed the certification process.
  - Not Certified - Percentage of products that are in the certification process and not yet complete.
  - Missing - Percentage of products in ECCnet and the brand owner is either not registered for pharmaceutical certification or products have not yet been introduced into the certification process.
- Planogram Content – Engagement levels for all trading partners showing whether or not they store a planogram image with GTIN data. The chart also shows the status of products in various stages of image and data capture, including: Completed; In Progress (products received and in the process of content capture); Scheduled (brand owner has completed scheduling as part of Content Capture Service Request). The chart links to lists of products in these stages.
- Marketing Content – Engagement levels for all trading partners showing whether or not they store a marketing image with GTIN data. The chart also shows the status of products in various stages of image and data capture, including: Completed; In Progress (products received and in the process of content capture);

Scheduled (brand owner has completed scheduling as part of Content Capture Service Request). The chart links to lists of products in these stages.

- Nutritional Content – Engagement levels for all trading partners showing whether or not they store nutrition information with case level GTIN data. The chart also shows the status of products in various stages of image and data capture, including: Certified; Not Certified; In Progress (products received and in the process of content capture); Scheduled (brand owner has completed scheduling as part of Content Capture Service Request). The chart links to lists of products in these stages.
- eCommerce Content - Showing engagement levels for products suitable for online commerce. All trading partners can see the status of products in various stages of image and data capture: Certified; Validated (awaiting certification); In Progress (products received and in the process of content capture); Scheduled (brand owner has completed scheduling as part of Content Capture Service Request). The chart links to lists of products in these stages.
- Foodservice Content-Nutrition - Engagement levels for all trading partners showing whether or not they store nutrition information with item level GTIN data.
- Foodservice Content-Marketing – Engagement levels for all trading partners showing whether or not they store marketing information with GTIN data.
- Foodservice Content-Images – Engagement levels for all trading partners showing whether or not they store a Foodservice image with GTIN data. The chart also shows the status of products in various stages of image and data capture, including: Image Available, Image in Progress, Image Scheduled, Image Not Available.
- ECCnet Recall - For data recipients, this chart shows how many of the brand owners you deal with are "Recall Ready". For data providers (brand owners), this is a gauge chart showing to what degree their company is "Recall Ready".

## Drilling Down

From the Home page, there are various ways to drill down for more information:

- GTIN Discrepancy - In the New Item Setup pie chart, click GTIN Discrepancy to view details of GTIN Discrepancy Report (GDR) tickets.
- KPI Detail Analysis – Select either a section of a business process pie chart or a graph legend entry to view all trading partners and total numbers of GTINs in that business process for each trading partner. You can drill down to details of GTINs associated with a single trading partner.
- Partner Aggregate Score Analysis - To view Partner Engagement score details for the selected business across all business processes, in the top right corner, next to View All Business Processes, click the percentage score.
- Partner Engagement Score Analysis – For each business process pie chart area, click the Partner Engagement score to view a bar graph that shows a compliance or engagement score for all trading partners. You can drill down to view GTINs for a single trading partner.
- Partner Aggregate Score Analysis – In Search by Trading Partner, choose Trading Partner Aggregate Score Analysis and click OK to display details of all business

process reports for all trading partners. You can drill down to view GTIN details for a single trading partner.

- GTIN Analysis by Trading Partner – In Search by Trading Partner, choose a single trading partner and click OK to display business process reports for GTINs listed with that partner. This is also referred to as the "Common View". Both data recipient and data provider see the same pie charts. You can drill down to view individual GTINs.

Each business process engagement chart has a Trends icon () . A separate Trends link on the right side of the page opens a chart that shows historical partner engagement scores for all business processes combined.

Click Trends to open a column chart with historical partner engagement scores for that business process. In the Trends view, each business process has a unique colour code. In the Trends view for all business processes, you can determine what business process you are viewing by its colour code.

To view the value of a bar, hover the mouse pointer over that bar. While the mouse is hovering, the bar colour changes to emphasize whether the value is below 50% () , 50 to 75% () or 76 to 100% () .

In the top left corner of any Trends chart, use the drop-down button to show historical scores for three months, six months or one year.

## GTIN Discrepancy

From the Home page, in the Master Data Management box, click GTIN Discrepancy. The GTIN Discrepancy (GDR) page appears showing the following:

- A bar chart
- A line chart
- A totals link

### Bar Chart

A bar chart shows the number of GTIN Discrepancy Report (GDR) tickets in various states.

- To view details of GDR tickets with a particular status, in the bar graph click the status name or the bar above the name. The table that appears shows all trading partners with GTINs in all states of the GDR process.
- When a number above zero appears in this table, you can click it to view details of each GDR ticket for the selected trading partner and the selected GDR status. This report also shows the problem type and the age of the GDR incident in days.

### **Line Chart**

A line graph in the same chart shows the average age of tickets in each status. To view the average number of days in each category, hover your mouse pointer over a point on the line graph.

### **Totals Link**

To view a table that shows all trading partners and all GDR ticket statuses, at the bottom of the GTIN Discrepancy (GDR) page click the Total GDR Tickets link.

To return to the Home page, in the sidebar, click Dashboard.

### **Drill Down**

In the GTIN Discrepancy bar graph, to view GTIN details for any GTIN Discrepancy Report (GDR) status, click a status name or the bar above the name. The table that appears shows all trading partners with GTINs in all states of the GDR process.

When a number above zero appears in this table, you can click it to view details of each GDR ticket for the selected trading partner and the selected GDR state. This report also shows the problem type and the age of the GDR incident in days.

### **KPI Detail Analysis**

From the Home page, click a section of a business process pie chart. The page that appears shows a table with all trading partners and total number of GTINs in various KPIs (Key Performance Indicators) for the selected business process.

To return to the Home page, in the sidebar, click Dashboard.

### **Drill Down**

In the trading partners table, to view GTIN details from a single trading partner, click the total value for that partner in the selected KPI column. The table that appears shows specific GTINs for the selected trading partner in the selected business process and for the selected KPI.

### **Partner Aggregate Score Analysis**

From the Home page, to view a bar-graph list of trading partners with a business process score total for each trading partner, in the top right corner, next to View All Business Processes, click the percentage score.

In the bar graph view, each bar chart line represents the engagement score that trading partner has received aggregated over all business processes.

To return to the Home page, in the sidebar, click Dashboard.

### **Drill Down**

In the trading partners bar graph page, to view GTIN details for a single trading partner, select the partner name. On the page that appears, the page title shows that you are viewing data from all business processes and displays the trading partner name.

In the drill down page, to view GTIN details for this partner and a specific business process, select the business process name from the drop-down list.

### **Partner Engagement Score Analysis**

From the Home page, choose a business process and click the Partner Engagement score. The page that appears shows a bar-graph list of trading partners with an individual business process score for each.

In the bar graph, each bar chart line represents the engagement score that trading partner has received for the selected business process.

To return to the Home page, in the sidebar, click Dashboard.

### **Drill Down**

In the trading partner bar graph page, to view GTIN details for a single trading partner, select the partner name. The page title that appears shows the name of the selected business process, the selected trading partner name and the name of the selected KPI.

In the drill down page, to view GTIN details for this partner and a different business process, in Select Business Process select the business process name.

### **GTIN Analysis by Trading Partner**

From the Home page, to analyze GTINs in business processes for a single trading partner, in Search by Trading Partner, select the name of a trading partner and click OK.

The view that appears is informally called the "Common View" because both you and your trading partner can open this view together and discuss opportunities around your trading relationship.

The GTIN Analysis page displays pie charts that show business process scores for the selected trading partner. The title that appears above the pie charts shows the trading partner name and the total engagement score for this trading partner.

From this view, you can drill down for information about specific GTINs for the selected trading partner. Do one of the following:

- **GTIN Discrepancy** - In the New Item Setup pie chart, click GTIN Discrepancy to view details of GTIN Discrepancy Report (GDR) tickets for the selected trading partner.
- **KPI Detail Analysis** - Each section of a business process pie chart contains Key Performance Indicator (KPI) data. Select either a graph legend entry or a section of a business process pie chart to view total number of GTINs in that KPI.
- **Partner Engagement Score Analysis** - Choose a business process and click the Partner Engagement score to view GTIN details for the selected business process.
- **All GTIN Analysis** - Click All GTINs to display all GTINs across all business processes. In the All GTINs page, to view GTIN details for this trading partner and a single business process, select a business process from the drop-down list.

To return to the Home page, in the sidebar, click Dashboard.

## Sidebar Reports

Hover the mouse pointer over the Report icon to see a list of reports.

Click the report name to view the report.

Descriptions below are examples of some of the reports that are available:

- **Trading Partner Management** - Showing all trading partners and a breakdown of all GTINs for each partner. Each breakdown shows their assortment of your products that are actively listed.
- **Total GTINs Exceptions** - Showing a list of GTINs with the publication/subscription process not complete. These GTINs might be missing specific data, as indicated in the report column headers. These products appear in business process pie charts under the "Missing" category. In this table, they are reported across all business processes and all trading partners.
- **Summary Score Across BPs** - This report shows a list of trading partners with scores for all business processes. Colours in this report help you identify where trading partners are engaging well and areas where there are opportunities for improvement.
- **Deleted/Discontinued Report** - This report shows a list of GTINs that have been either deleted or discontinued and helps you identify trading partners who still have them listed as active.
- **Not Complete/Compliant Report** - View GTINs that are either missing values in some required fields or containing values that do not pass ECCnet Registry validations. This report extracts data across all trading partners and all business processes in one report.

## Summary

Hover the mouse pointer over the Summary icon to see a list of reports.

Click the report name to view the report.

- Status - For the company that you represent as a logged in user, you can view a status report that includes the company Global Location Number.

## Sorting and Filtering a Table

When a table list appears, an arrow icon is displayed in a default column, showing that the table is sorted in ascending order by the values in that column. In some columns, to sort the list by a different column, click the column header. The list is sorted in ascending order by values in the selected column. To reverse the sort order, click the column header a second time.

To help find a GTIN or a trading partner in a list table, you can change the appearance of the list table in the following ways:

- Page Display – Show more or less information and browse through pages.
- Filters – View GTINs or trading partners that match a pattern in the column field.

### Page Display

The top of the table contains some page controls to help you find a specific product:

- Total number of items per page. To change the number of items visible on a single page, select a number from the drop-down list.
- Total Records. View the total number of records selected from the Summary panel.
- Page navigation buttons. With multiple pages of records, use the First ( « ), Last ( » ), Previous ( ◀ ) and Next ( ▶ ) buttons.

To sort the table contents in descending order by a column header, click the header. To sort in the opposite order, click the header a second time.

### Filters

To display a shorter list or to help find a specific GTIN or trading partner, use one or multiple filter fields that appear at the top of each column.



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