

# Bulk Update Packaging Hierarchy



# User Login

## User Login

The screenshot shows a web browser window with the URL `auth.mdm.stibosystems.com/auth/realms/cvs-test/protocol/openid-connect/auth?response_type=code&client_id=Step&state=5cf8632f-1c7f-4661-9ebe-054a50667235&login=true&scope=openid&redirect_uri=https%3A%2F%2Fcvstest.scloud.stibo.com%2F...`. The page features a futuristic background with blue and orange light trails. The Stibo Systems logo is in the top right. The main content area has two login sections. The first section, 'STEP managed user log in', includes a prompt 'Please log in using the form', a 'Username' input field (marked with a red circle 2), a 'Password' input field, a 'Forgot STEP password' link, and a 'Log In' button (marked with a red circle 3). The second section, 'IDP managed user log in', includes a link for 'CVS Internal Colleagues - Click here'. A red circle 1 points to the browser's address bar. At the bottom, a small footer reads 'Powered by Stibo Systems | Copyright © 2021 Stibo Systems, Inc. All rights reserved.'

## Description / Steps

1. Enter URL for Stibo
2. Enter Username and password
3. Click on Log In button

# Advanced Search for Product

## Stibo Home Screen – Links Widget

The screenshot displays the Stibo Home Screen. On the left is a dark teal sidebar with the CVS Health logo and navigation links: Global Search, Tree, Supplier Search, Product Search, and Product Variant Search. The main content area is titled 'Welcome to the STEP Web UI'. At the top right, there is a 'Self-Help Menu' button and user information: WILLIAM'S TOYS(40196) • Danielle Hammond • English US • Main. The dashboard features several widgets. The 'Links' widget is highlighted with a red circle and the number '1'. It contains a list of links: 'Supplier self onboarding process guidelines', 'Link to CVSSuppliers.com', 'Advanced Search', 'Advanced Search For Product', 'Clone Product', 'Clone NFR Product', 'Import Smartsheet For Bulk Product Creation', and 'Import Smartsheet For Product Maintenance'. A second red circle with the number '2' points to the 'Advanced Search' link. Other widgets include 'New Supplier Onboarding', 'New Agent Onboarding', 'Supplier Maintenance', 'Clarification Workflow', 'Onboard new Product', 'Onboard a New NFR Product', 'Product Maintenance For S...', 'Product NFR Maintenance', 'Product Variant Creation', 'Product Variant Maintenance', 'Product Clarification', 'Bulk Creation Template Exp...', 'Bulk Creation Template for ...', and 'Manage Your Account'. The bottom of the sidebar contains 'User Settings' and 'System Settings' links, and the STIBO SYSTEMS logo.

## Description / Steps

Upon login the user will be in the Stibo home screen.

1. Go to the Links widget.
2. Click on Advanced Search for Product

# Search for Items to update

## Packaging Search

Advanced Search For Product

Self-Help Menu

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264

Search from List

269235  
545893  
273104

Number of pasted entries: 4

Linked Item Number

My Searches

☆ Active Item Search For Sup...  
☆ Asset Search  
☆ Packaging Search

Search Create collection Clear

Select all Update Item(s) Export Smartsheet Packaging Smartsheet Export Product Asset Metadata Export

ID	Name	CVS Item Number	Item Brand Type	Category Name	Sub Category Name	Segment Name
No existing records						

Selected items: 0

## Description / Steps

1. Click on **Packaging Search** (note the search screen will be blank until you click on **Packaging Search**)
2. Enter the list of item numbers that you wish to update into the **Search From List** box.
3. Click on **Search**.

## Tip

You can copy and paste from a column in excel into the search from list box or type in the item numbers one at a time, click on enter after each number.

# Search for Items to update

## Packaging Search

Advanced Search For Product

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Search from List  
269235  
545893  
273104  
Number of pasted entries: 4  
Linked Item Number

Search Create collection Clear

My Searches  
☆ Active Item Search For Sup...  
☆ Asset Search  
☆ Packaging Search

Select all Update Item Export Smartsheet Packaging Smartsheet Export Product Asset Metadata Export

ID	Name	CVS Item Number	Item Brand Type	Category Name	Sub Category Name	Segment Name
<input type="checkbox"/> Case_194129295	Case_194129295					
<input type="checkbox"/> Case_194129307	Case_194129307					
<input type="checkbox"/> Case_194393909	Case_194393909					
<input type="checkbox"/> Case_194654094	Case_194654094					
<input type="checkbox"/> Case_194804196	Case_194804196					
<input type="checkbox"/> InnerPack_194724308	InnerPack_194724308					
<input type="checkbox"/> InnerPack_194804195	InnerPack_194804195					
<input type="checkbox"/> Layer_194129296	Layer_194129296					
<input type="checkbox"/> Layer_194129308	Layer_194129308					
<input type="checkbox"/> Layer_194393910	Layer_194393910					
<input type="checkbox"/> Layer_194654095	Layer_194654095					
<input type="checkbox"/> Layer_194804197	Layer_194804197					
<input type="checkbox"/> Pallet_194129297	Pallet_194129297					
<input type="checkbox"/> Pallet_194129309	Pallet_194129309					
<input type="checkbox"/> Pallet_194393911	Pallet_194393911					
<input type="checkbox"/> Pallet_194654096	Pallet_194654096					

Selected items: 0

## Description / Steps

1. Click on Select All.

# Export Items to Update

## Export Smartsheet

Advanced Search For Product

Search from List  
269235  
545893  
273104  
Number of pasted entries: 4  
Linked Item Number

Search Create collection Clear

My Searches  
★ Active Item Search For Sup...  
★ Asset Search  
★ Packaging Search

Clear all ▶ Update Item(s) Export Smartsheet Packaging Smartsheet Export Product Asset Metadata Export

ID	Name	CVS Item Number	Item Brand Type	Category Name	Sub Category Name	Segment Name
✓ Case_194129295	Case_194129295					
✓ Case_194129307	Case_194129307					
✓ Case_194393909	Case_194393909					
✓ Case_194654094	Case_194654094					
✓ Case_194804196	Case_194804196					
✓ InnerPack_194724308	InnerPack_194724308					
✓ InnerPack_194804195	InnerPack_194804195					
✓ Layer_194129296	Layer_194129296					
✓ Layer_194129308	Layer_194129308					
✓ Layer_194393910	Layer_194393910					
✓ Layer_194654095	Layer_194654095					
✓ Layer_194804197	Layer_194804197					
✓ Pallet_194129297	Pallet_194129297					
✓ Pallet_194129309	Pallet_194129309					
✓ Pallet_194393911	Pallet_194393911					
✓ Pallet_194654096	Pallet_194654096					

Export Smartsheet

Choose Smartsheet Export Configuration

Product Packaging Supplier Maintenance Smartsheet Configuration

Cancel OK

Selected items: 17

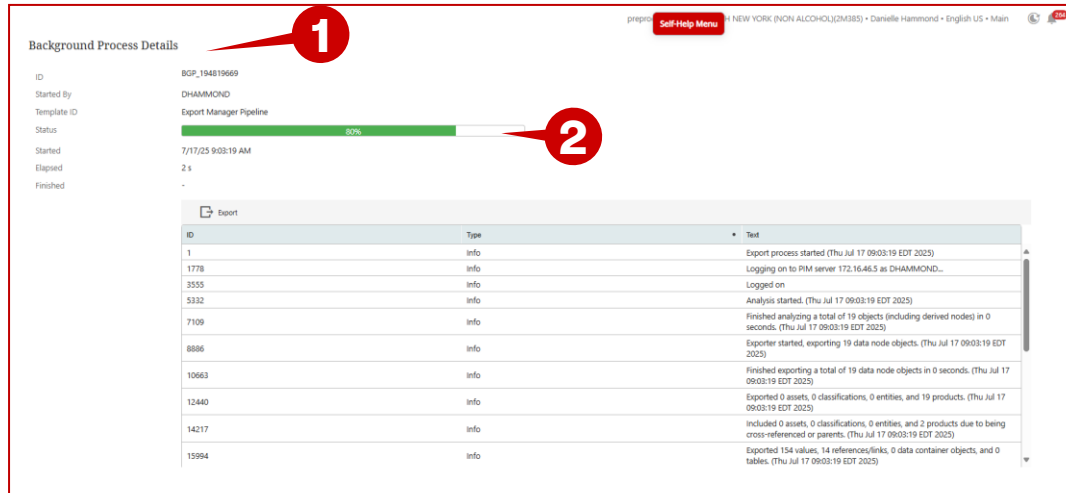
## Description / Steps

1. A check mark will appear beside each item.
2. Click on Packaging Smartsheet Export.
3. The Export Smartsheet dialog box will pop-up.
4. Click on OK

Select all

# Background Process

## Downloading Smartsheet



Background Process Details

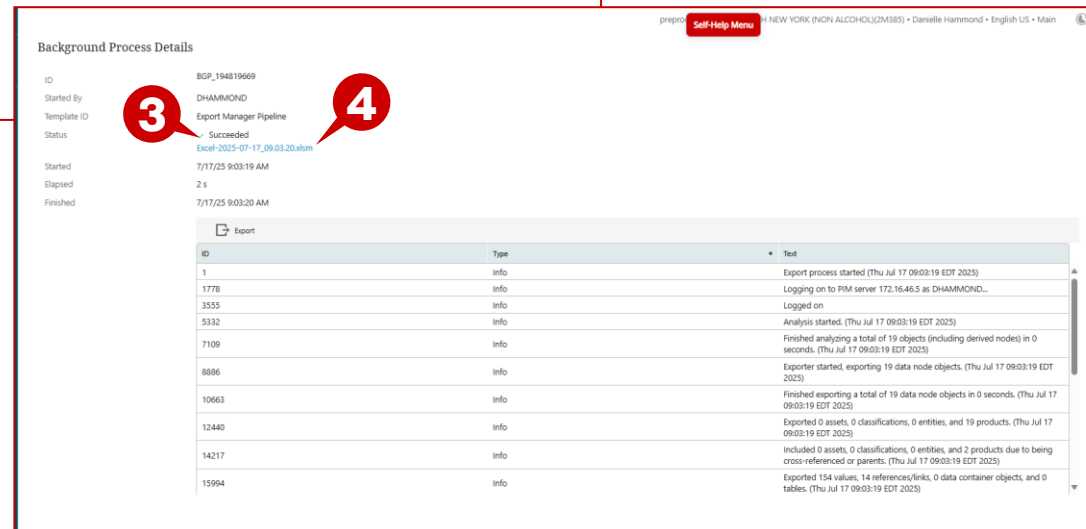
1

2

Export Manager Pipeline

60%

ID	Type	Text
1	Info	Export process started (Thu Jul 17 09:03:19 EDT 2025)
1778	Info	Logging on to PIM server 172.16.46.5 as DHAMMOND...
3555	Info	Logged on
5332	Info	Analysis started. (Thu Jul 17 09:03:19 EDT 2025)
7109	Info	Finished analyzing a total of 19 objects (including derived nodes) in 0 seconds. (Thu Jul 17 09:03:19 EDT 2025)
8886	Info	Exporter started, exporting 19 data node objects. (Thu Jul 17 09:03:19 EDT 2025)
10663	Info	Finished exporting a total of 19 data node objects in 0 seconds. (Thu Jul 17 09:03:19 EDT 2025)
12440	Info	Exported 0 assets, 0 classifications, 0 entities, and 19 products. (Thu Jul 17 09:03:19 EDT 2025)
14217	Info	Included 0 assets, 0 classifications, 0 entities, and 2 products due to being cross-referenced or parents. (Thu Jul 17 09:03:19 EDT 2025)
15994	Info	Exported 154 values, 14 references/links, 0 data container objects, and 0 tables. (Thu Jul 17 09:03:19 EDT 2025)



Background Process Details

3

4

Export Manager Pipeline

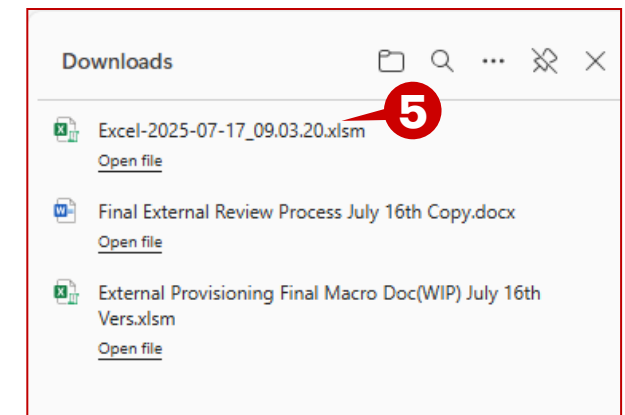
Succeeded

[Excel-2025-07-17\\_09.03.20.xlsx](#)

ID	Type	Text
1	Info	Export process started (Thu Jul 17 09:03:19 EDT 2025)
1778	Info	Logging on to PIM server 172.16.46.5 as DHAMMOND...
3555	Info	Logged on
5332	Info	Analysis started. (Thu Jul 17 09:03:19 EDT 2025)
7109	Info	Finished analyzing a total of 19 objects (including derived nodes) in 0 seconds. (Thu Jul 17 09:03:19 EDT 2025)
8886	Info	Exporter started, exporting 19 data node objects. (Thu Jul 17 09:03:19 EDT 2025)
10663	Info	Finished exporting a total of 19 data node objects in 0 seconds. (Thu Jul 17 09:03:19 EDT 2025)
12440	Info	Exported 0 assets, 0 classifications, 0 entities, and 19 products. (Thu Jul 17 09:03:19 EDT 2025)
14217	Info	Included 0 assets, 0 classifications, 0 entities, and 2 products due to being cross-referenced or parents. (Thu Jul 17 09:03:19 EDT 2025)
15994	Info	Exported 154 values, 14 references/links, 0 data container objects, and 0 tables. (Thu Jul 17 09:03:19 EDT 2025)

## Description / Steps

1. Background process screen will open.
2. The progress bar will show the progress of the creation of the smartsheet.
3. Once complete, the status will show succeeded.
4. Click on the blue hyperlink.
5. The downloads box will open in your browser.



Downloads

5

Excel-2025-07-17\_09.03.20.xlsxsm

[Open file](#)

Final External Review Process July 16th Copy.docx

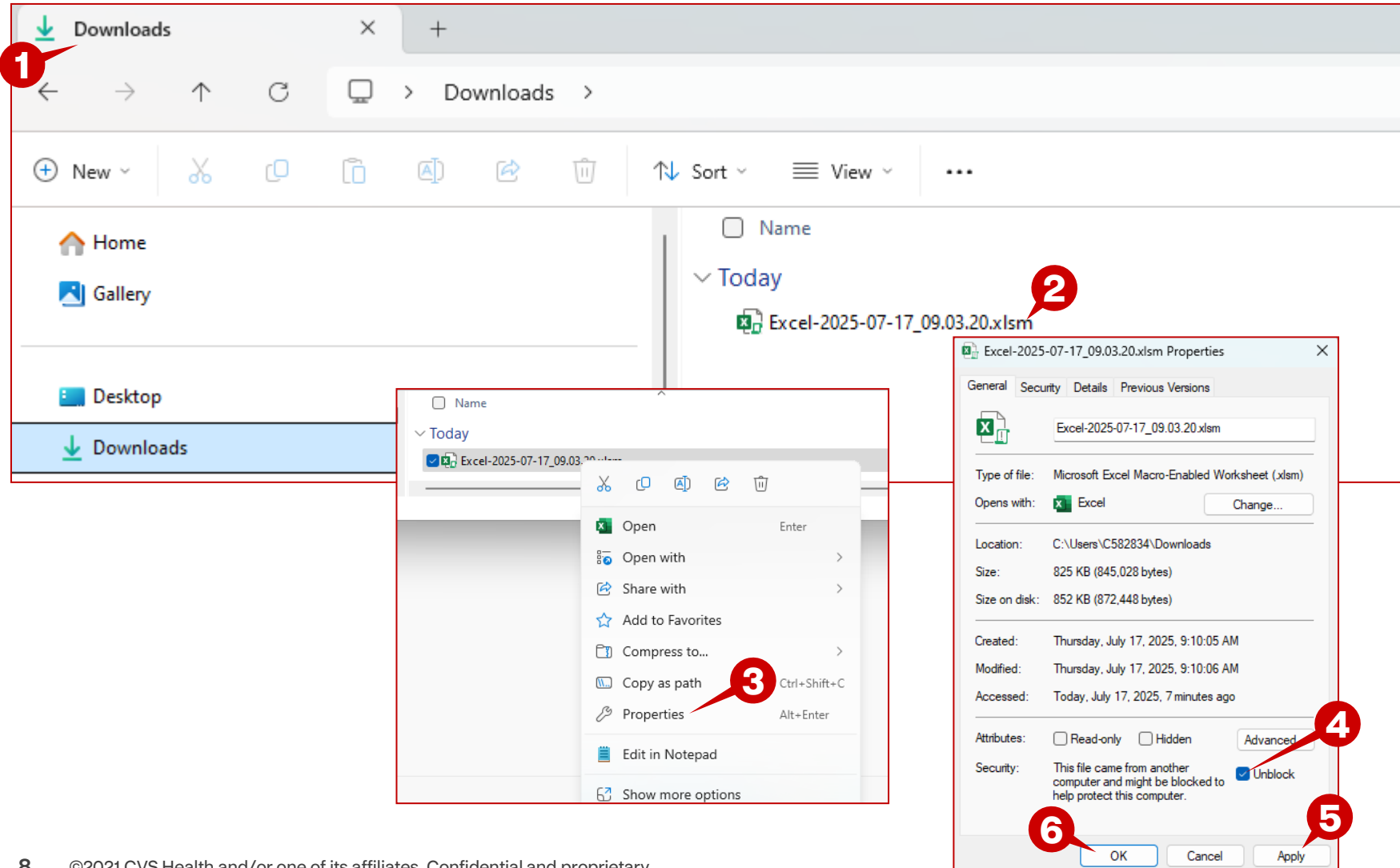
[Open file](#)

External Provisioning Final Macro Doc(WIP) July 16th Vers.xlsxsm

[Open file](#)

# Set Properties

## Unlock Macros



## Description / Steps

1. Go to your downloads folder.
2. Right-click on the file that you just downloaded.
3. Click on Properties.
4. Put a check in the Unblock box.
5. Click Apply.
6. Click OK.

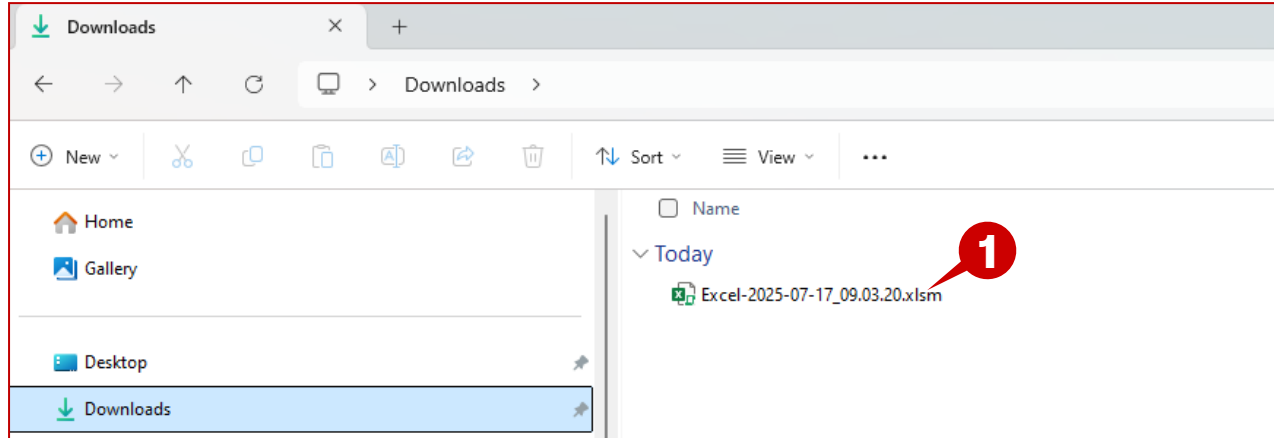
## Tip

*If you don't see the unblock on the properties box, no further action is needed.*



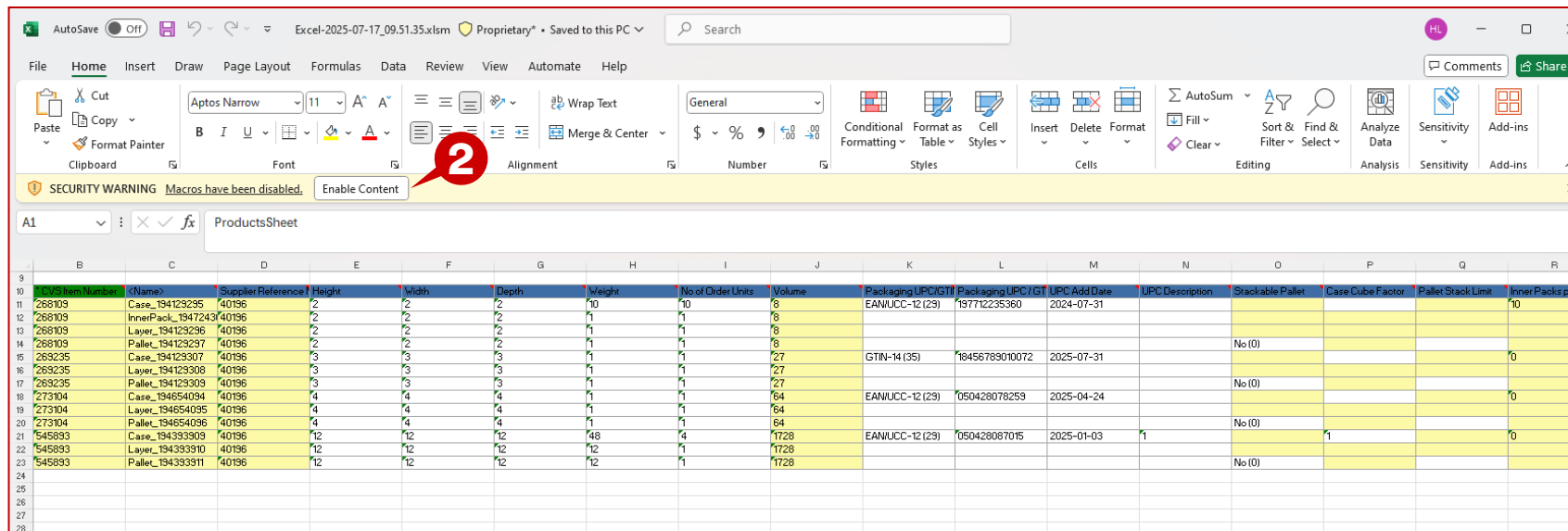
# Open File

## Enable Content



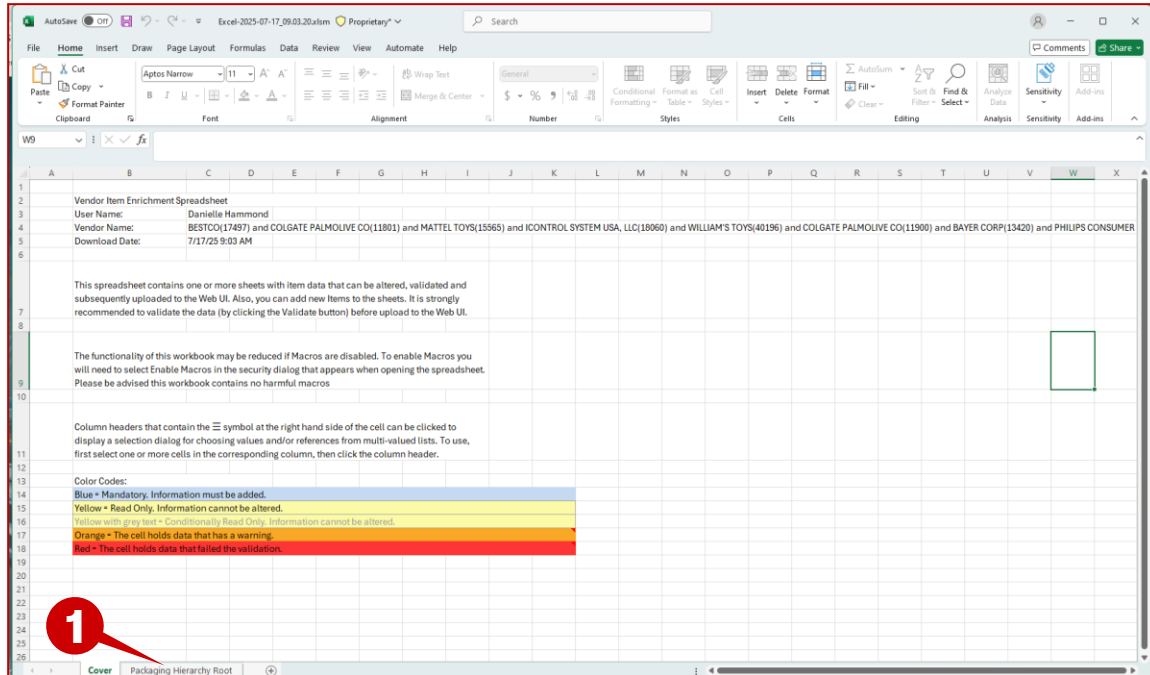
## Description / Steps

1. Open the file.
2. Click on Enable Content.



# Update Packaging Information

## Update/Save File



1

2

3

4

CVS Item Number	Name	Supplier Reference	Height	Width	Depth	Weight	No of Order Units	Volume	Packaging UPC/E	Packaging UPC / UPC Add Date	UPC Description	Stackable Pallet	Case Cube Factor	Pallet Stack Limit	Inner Packs per Case	Cases Per Pallet	Layers Per Pallet
268109	Case_194123295	40196	2	2	2	10	10	8	EANUCC-12 (29)	197712235360	2024-07-31				10		
268109	InnerPack_194123295	40196	2	2	2	1	1	8									
268109	Layer_194123295	40196	2	2	2	1	1	8									
268109	Pallet_194123297	40196	2	2	2	1	1	8				No (0)				0.1	1
263235	Case_194123307	40196	3	3	3	1	1	27	GTIN-14 (35)	18456789010072	2025-07-31				0		
263235	Layer_194123308	40196	3	3	3	1	1	27									
263235	Pallet_194123309	40196	3	3	3	1	1	27				No (0)				1	1
273104	Case_194540394	40196	4	4	4	1	1	64	EANUCC-12 (29)	050428078259	2025-04-24						
273104	Layer_194540395	40196	4	4	4	1	1	64									
273104	Pallet_194540396	40196	4	4	4	1	1	64				No (0)				1	1
545893	Case_194393309	40196	12	12	12	48	4	1728	EANUCC-12 (29)	050428087015	2025-01-03	1		1	0		
545893	Layer_194393310	40196	12	12	12	1	1	1728									
545893	Pallet_194393311	40196	12	12	12	1	1	1728				No (0)				0.25	1

## Description / Steps

1. Click on Packaging Hierarchy Root tab.
2. This is the Item Number.
3. This indicates the part of the packaging hierarchy to be updated.
4. Make your updates and save the file.

## Tip

Cells highlighted yellow cannot be changed.

## Validating the worksheet

Log In **3**

Done 6

4



1. Validate Smartsheet Contents box will display.
2. The login box will display and will open the browser window to the login page.
3. Enter your login credentials and login.
4. The message will display for you to close the window.
5. Click on Login, once you have closed the browser window.
6. The sheet will validate and display the Validation result. In our example there were no errors. Click on Done.
7. If there are errors, you will see the row with the error will display in red. Hover over the cell and the errors will be displayed. In this example, there is a UPC error and Product Type is mandatory and cannot be null.
8. Correct the errors and go through the validation process as outlined above. Although, you will not have to login again.

# Upload Smartsheet

## Links Widget

## Description / Steps

1. Go to the Links widget.
2. Scroll down in the widget.
3. Click on [Import Smartsheet for Packaging Metadata Update](#)
4. Click on [Choose File](#).
5. Select the file that you updated.
6. Click on [OK](#).

The screenshot shows the STEP Web UI interface. The top navigation bar includes a 'Self-Help Menu' button and user information. The main content area features several widgets: 'Welcome to the STEP Web UI', 'Links', 'New Supplier Onboarding', 'New Agent Onboarding', 'Supplier Maintenance', and 'Clarification Workflow'. The 'Links' widget is highlighted with a red circle and a number 1. A scroll bar in the 'Links' widget is highlighted with a red circle and a number 2. A red circle with a number 3 points to the link 'Bulk Import for Content Provider Product Creation'. A red circle with a number 4 points to the 'Choose File' button in the 'Import Smartsheet' dialog box. A red circle with a number 5 points to the file 'Excel-2025-07-17\_09.51.35.xlsm' in the file explorer. A red circle with a number 6 points to the 'OK' button in the 'Import Smartsheet' dialog box.

**Links**

- Supplier self onboarding process guidelines
- Link to CVSSuppliers.com
- Advanced Search
- Advanced Search For Product
- Clone Product
- Clone NFR Product
- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance

**Onboard new Product**

Create New Product	
Product Onboarding - In Progress	9
Products Sent Back By CA	0
Products Sent Back By DM	0
Products Awaiting Content Provider Data	2
Total	11

**Links**

- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance
- Product SOP Documents
- [Bulk Import for Content Provider Product Creation](#)
- Import Smartsheet for Packaging Metadata Update
- Advanced Search Screen for Asset
- Asset Enrichment Template

**Import Smartsheet**

Select Smartsheet file

Choose File No file chosen

☒ Import hidden rows

Cancel OK

Open

Downloads

Organize New folder

Desktop Downloads Documents

Today

- Excel-2025-07-17\_09.51.35.xlsm
- Excel-2025-07-17\_09.03.20.xlsm

**Import Smartsheet**

Select Smartsheet file

Choose File Excel-2025-07-17\_09.51.35.xlsm

☒ Import hidden rows

Cancel OK

# Request access to New Supplier Number

## Advanced Search

Welcome to the STEP Web UI

Creation of background process initiated [BGP\\_194819841](#) (Web UI Smartsheet Import)

**1**

**Links**

- Import Smartsheet For Bulk Product Creation
- Import Smartsheet For Product Maintenance
- Product SOP Documents
- Bulk Import for Content Provider Product Creation
- Import Smartsheet for Packaging Metadata Update
- Advanced Search Screen for Asset
- Asset Enrichment Template

**New Supplier Onboarding**

One Time Agent Verification	0
Supplier Self Onboarding	0
Total	0

**New Agent Onboarding**

One time Agent Verification	0
-----------------------------	---

**Supplier Maintenance**

Maintain Supplier Data	1
------------------------	---

**Clarification Workflow**

Review	1
--------	---

**Onboard new Product**

Create New Product	
Product Onboarding - In Progress	9
Products Sent Back By CA	0
Products Sent Back By DM	0
Products Awaiting Content Provider Data	2
Total	11

**Onboard a New NFR Product**

Create a New NFR Product

Product Onboarding - In Progress	0
Total	0

**Product Maintenance For Suppliers**

Product Maintenance

Sent Back

**Background Process Details**

ID	BGP_194819843
Started By	DHAMMOND
Template ID	Import Manager Pipeline
Status	⌚ Waiting
Started	N/A
Elapsed	3 s
Finished	-

**Bulk Creation Template Export**

All suppliers

Export

## Description / Steps

1. Pop-up box displays with background process, click on the blue hyperlink.
2. Review the status of the background process.
3. When it's completed, you will see succeeded in the status. If there are errors, you can scroll down to review the errors.

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**Background Process Details**

ID	BGP_194819843
Started By	DHAMMOND
Template ID	Import Manager Pipeline
Status	✓ Succeeded
Started	N/A
Elapsed	4 s
Finished	7/17/25 10:18:05 AM

**Export**

ID	Type	Text
3555	Info	Conversion started (Thu Jul 17 10:18:04 EDT 2025)
5332	Info	27 values will be excluded from import due to Smartsheet cells being read-only
7109	Info	Converted 13 objects (Thu Jul 17 10:18:04 EDT 2025)
8886	Info	Logged on
10663	Info	Mapping started (Thu Jul 17 10:18:04 EDT 2025)
12440	Info	Mapping completed (Thu Jul 17 10:18:04 EDT 2025)
14217	Info	Import Started
15994	Info	Logged On
17771	Info	Using import mode "domain"
19548	Info	Starting first import pass (creating system setup objects)
21325	Info	Starting second import pass (importing data)
23102	Info	Imported 0 new products, 0 new classifications, 0 new entities and 0 new assets.

**2**