

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 at the top right. The main content area has two sections: 'STEP managed user log in' and 'IDP managed user log in'. The 'STEP managed user log in' section includes a 'Please log in using the form' instruction, 'Username' and 'Password' input fields, a 'Forgot STEP password' link, and a 'Log In' button. The 'IDP managed user log in' section includes a link for 'CVS Internal Colleagues - Click here'. Red callout boxes with numbers 1, 2, and 3 point to the browser address bar, the 'Log In' button, and the 'Forgot STEP password' link, respectively.

1

STIBO SYSTEMS
MASTER DATA MANAGEMENT

STEP managed user log in
Please log in using the form

Username

Password

Forgot STEP password

Log In

IDP managed user log in
CVS Internal Colleagues - Click here

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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 at the top. Below the logo are search options: Global Search, Tree, Supplier Search, Product Search, and Product Variant Search. At the bottom of the sidebar are User Settings and System Settings, and the STIBO SYSTEMS MASTER DATA MANAGEMENT logo. The main content area is light gray and titled 'Welcome to the STEP Web UI'. In the top right corner, 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 'Manage Your Account' widget shows the user's name 'DANIELLE HAMMOND' and email 'lyn.hammond@cvshealth.com', with a 'User Details' link and a 'Logout' button. The bottom of the dashboard has an 'Export' button for each of the three bulk creation templates.

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

The screenshot shows the 'Advanced Search For Product' interface. At the top right, there is a 'Self-Help Menu' button and a notification icon with '264'. The main area is divided into two panels. The left panel, titled 'Search from List', contains a text input field with three lines of item numbers: '269235', '545893', and '273104'. A red circle with the number '2' points to this input field. Below the input field, it says 'Number of pasted entries: 4' and 'Linked Item Number'. The right panel, titled 'My Searches', contains three search options: 'Active Item Search For Sup...', 'Asset Search', and 'Packaging Search'. A red circle with the number '1' points to the 'Packaging Search' option. At the bottom of the interface, there is a 'Search' button with a magnifying glass icon, a 'Create collection' button, and a 'Clear' button. A red circle with the number '3' points to the 'Search' button. Below these buttons, there is a toolbar with icons for 'Select all', 'Update Item(s)', 'Export Smartsheet', 'Packaging Smartsheet Export', and 'Product Asset Metadata Export'. Below the toolbar, there is a table header with columns: 'ID', 'Name', 'CVS Item Number', 'Item Brand Type', 'Category Name', 'Sub Category Name', and 'Segment Name'. Below the table header, it says 'No existing records' and shows a folder icon. At the bottom left, it says '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

preprod Self-Help Menu NEW YORK (NON ALCOHOL)(2M385) • Danielle Hammond • English US • Main 264

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
☐ 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					

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

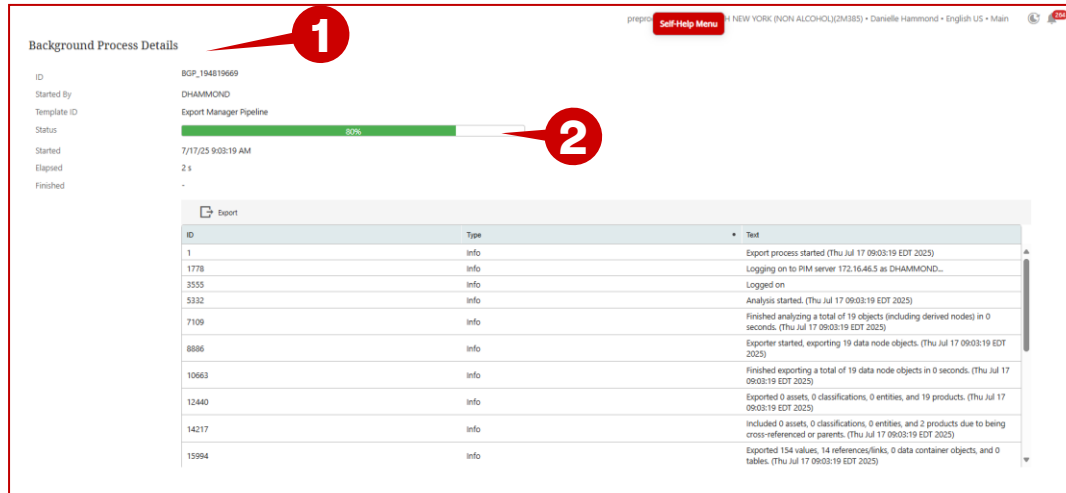
Description / Steps

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

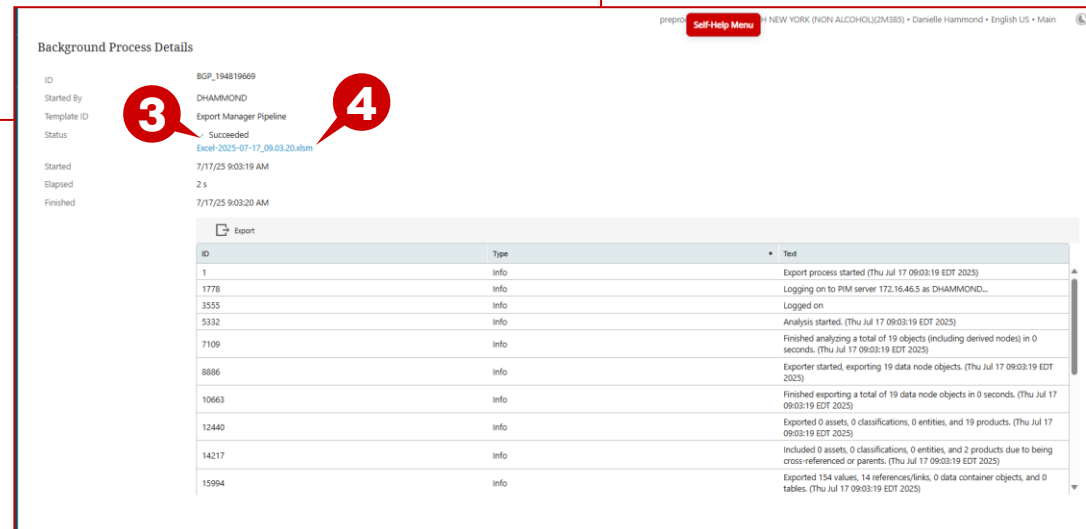
1

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

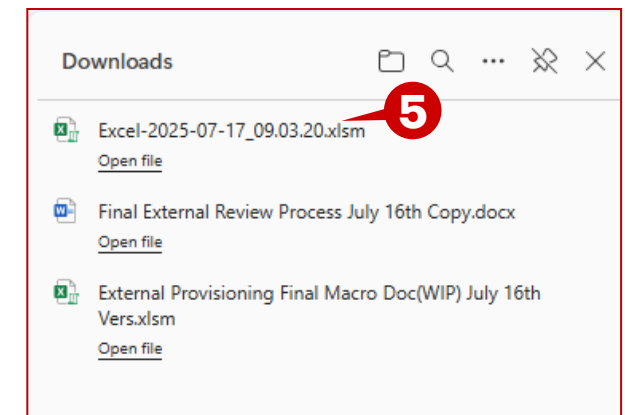
Succeeded

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

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.xlsm

[Open file](#)

Final External Review Process July 16th Copy.docx

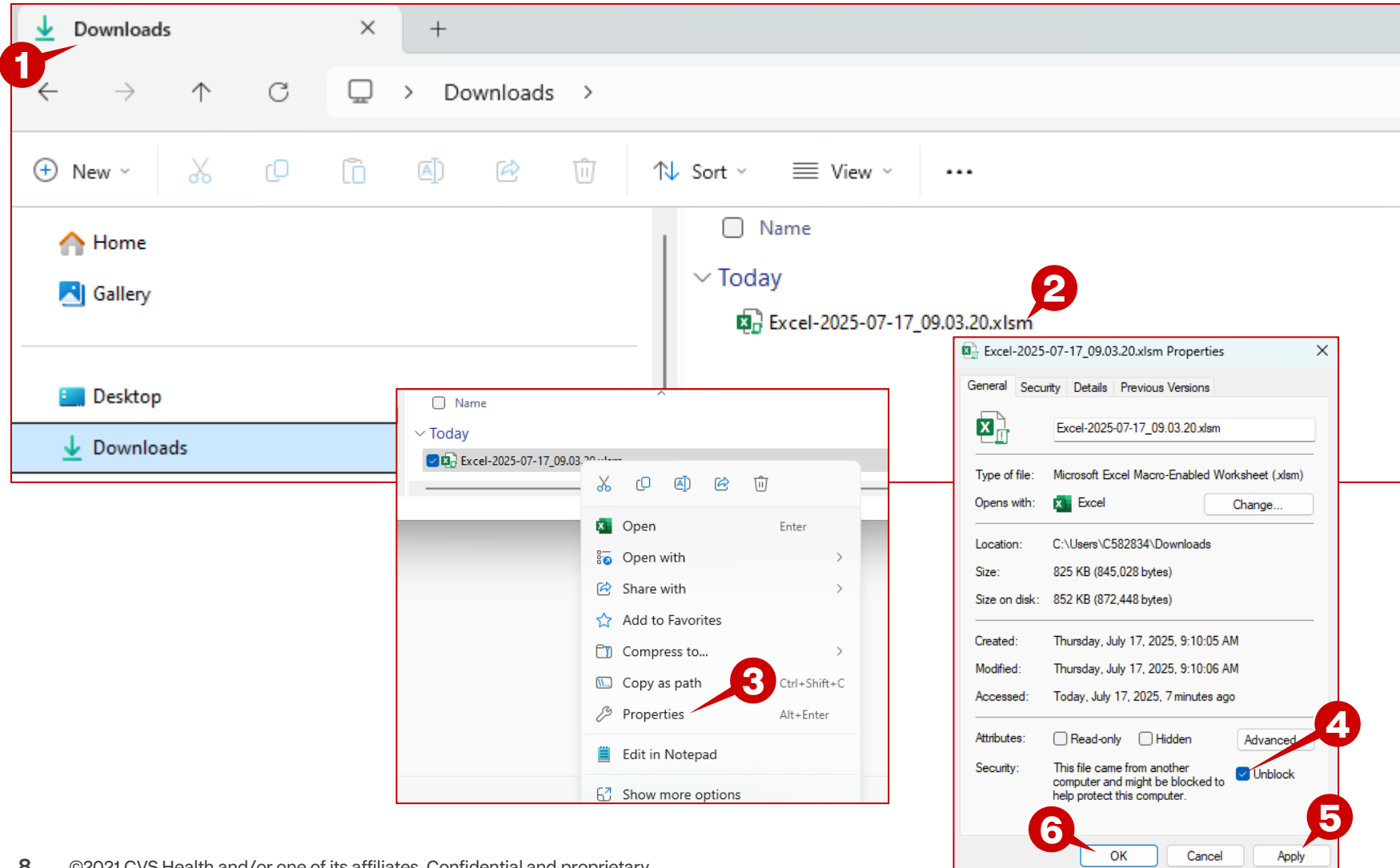
[Open file](#)

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

[Open file](#)

Set Properties

Unlock Macros



Description / Steps

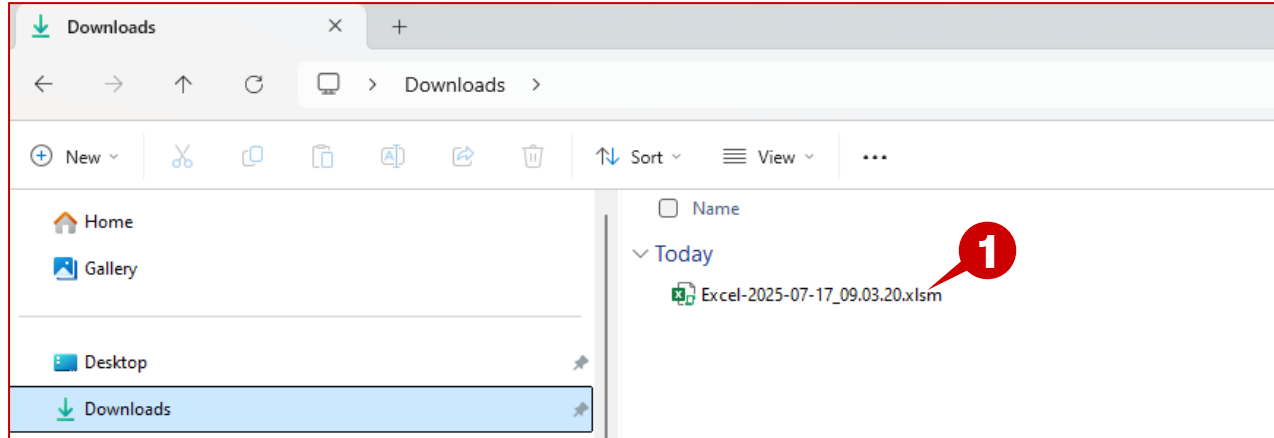
1. Go to your downloads folder.
2. Right-click on the file that you just downloaded.
3. Click on Properties.
4. Put a check in the Unblock box.
5. Click Apply.
6. Click OK.

Tip

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

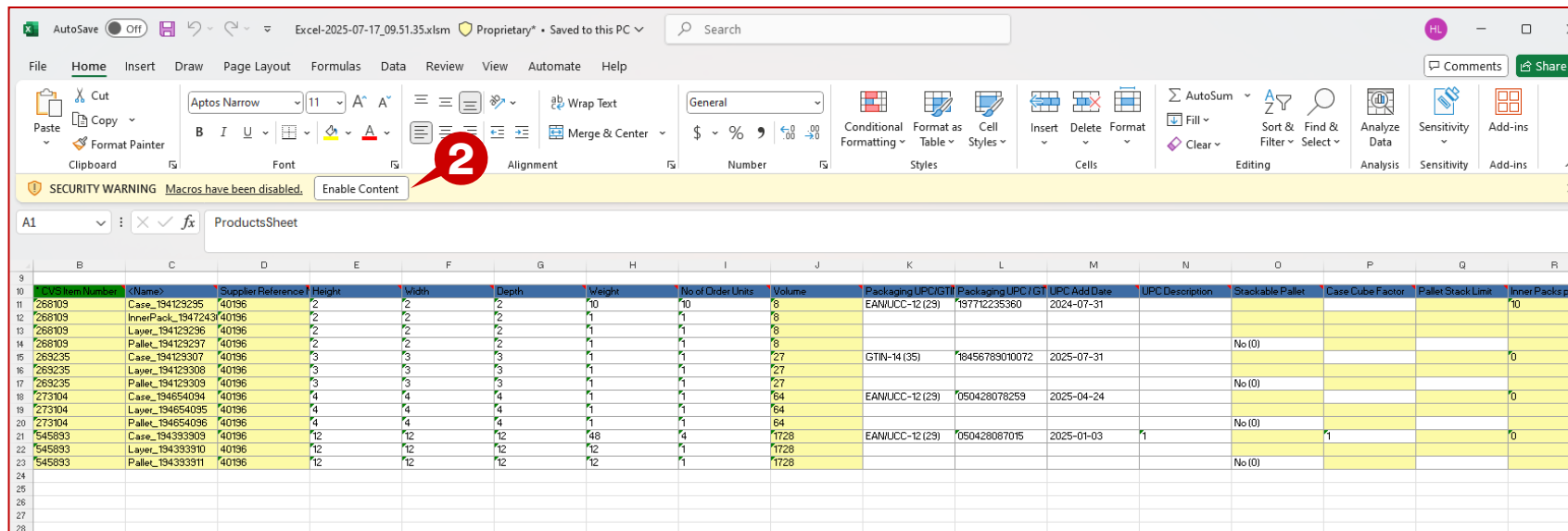
Open File

Enable Content



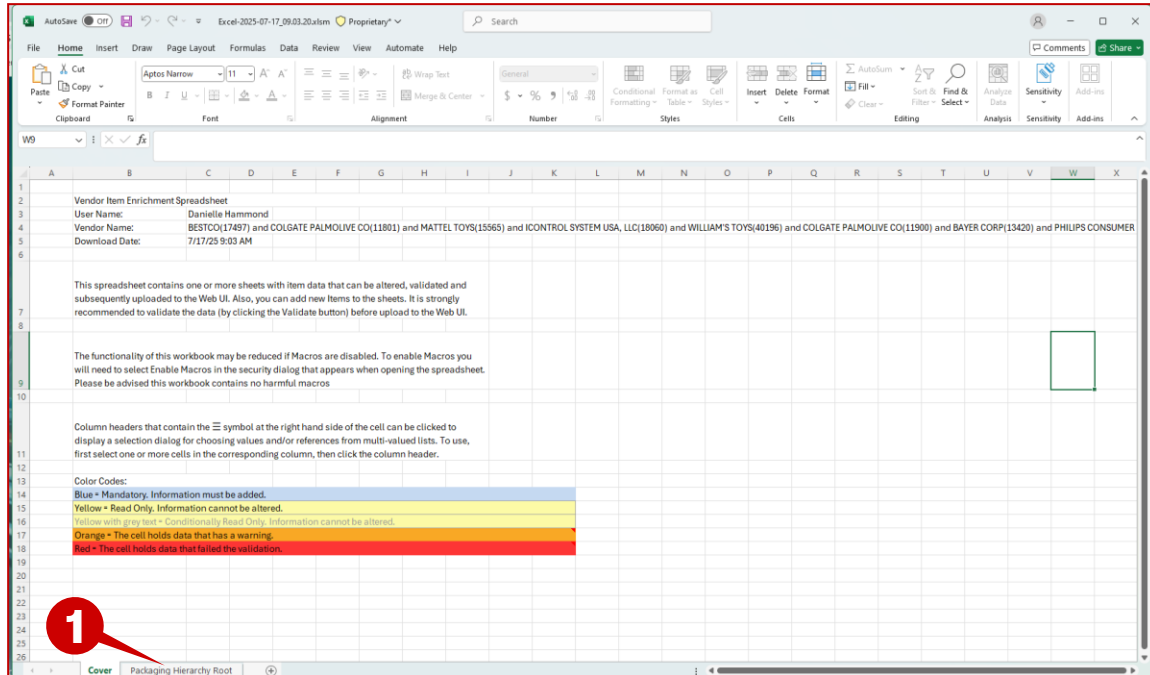
Description / Steps

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

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.

2025-01-08

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 'Import Smartsheet for Packaging Metadata Update'. 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.

Welcome to the STEP Web UI

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

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

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
--------	---

Import Smartsheet

Select Smartsheet file

Choose File No file chosen

☒ Import hidden rows

Cancel OK

Open

Downloads

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.

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