

How to use the
UNSPSC “My Cheat Sheet”
Application

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Saving Time with the My Cheat Sheet Worksheets

Welcome to the My Cheat Sheet worksheets, brought to you by the Office for Supply Management Services. My Cheat Sheet was designed to make it significantly easier to navigate and use the United Nations Standard Products and Services Codes (UNSPSC). Cornell departments are using the UNSPSC to classify their purchases when entering data into KFS.

The concept behind My Cheat Sheet is simple, yet powerful. Using the provided MS Excel worksheets, identify the UNSPSC most commonly used for your purchases and create a custom list, or cheat sheet. The list can be created for a department, unit or a buyer, as short or as long as desired. It is as simple as placing an “X” next to the code you want on your list and pressing a button.

The Starter Set 100

To assist every department, we’ve developed a list of commonly used UNSPSCs. This “starter set” is provided to offer assistance to those new to the UNSPSC. It can be modified (add or delete selected codes) extremely easily. To provide flexibility, with a click of a mouse, the “starter set” can be erased and a new list can be created.

Basic steps for using My Cheat Sheet

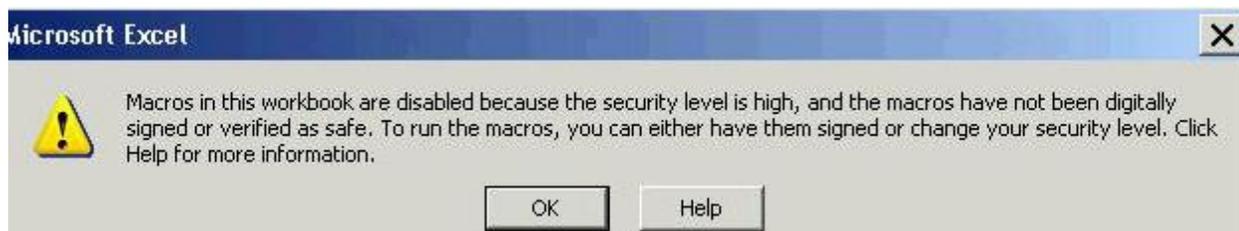
| | |
|-------------------------------|---|
| 1. Understand UNSPSC Segments | Print or browse the list of UNSPSC Segments in the “ Guide to Segments ” worksheet tab. |
| 2. Create Your Cheat Sheet | Go to the “ Start Here ” worksheet tab. Use the drop-down list of Segments to navigate the UNSPSC. Place an “X” next to codes to go on your list. Press the “Create My Cheat Sheet” button. That’s it! |

Before You Start Working

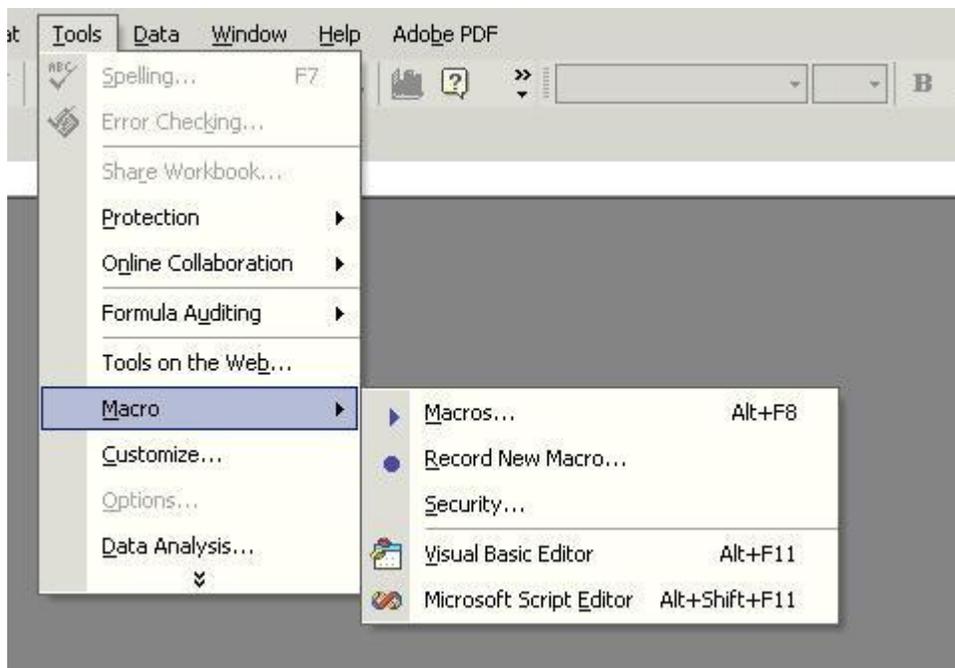
Loading the Microsoft Excel Worksheets (Macros)

The My Cheat Sheet worksheets contain a few macros. The macros are used to automate, and make easier, some tasks that are quite complicated. Security in Microsoft Excel is developed to prevent macros from loading, as macros developed by an unknown (not trusted) source might contain a virus. In order for My Cheat Sheet to work correctly, the macros must be allowed to run.

When you load My Cheat Sheet, you will most likely get a security warning. The warning you get, or the steps required to be completed, may vary from the information below depending on the version of Excel you are using. The following was documented in Excel 2003. If macro security is set to high, depending on your version of Excel, you will see the following message:



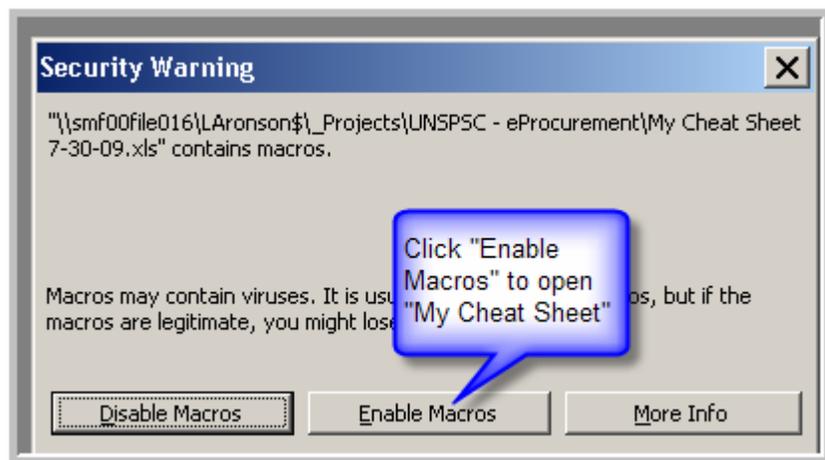
Changing your security level to medium will allow the macros to work, while retaining adequate security. The first step is to access the security options, by clicking on Tools-Macro-Security.



On the following screen, change the level to Medium and click Ok.



If Security is set to medium, you may see the following message the next time you load the My Cheat Sheet worksheets.



Making It Easier For You

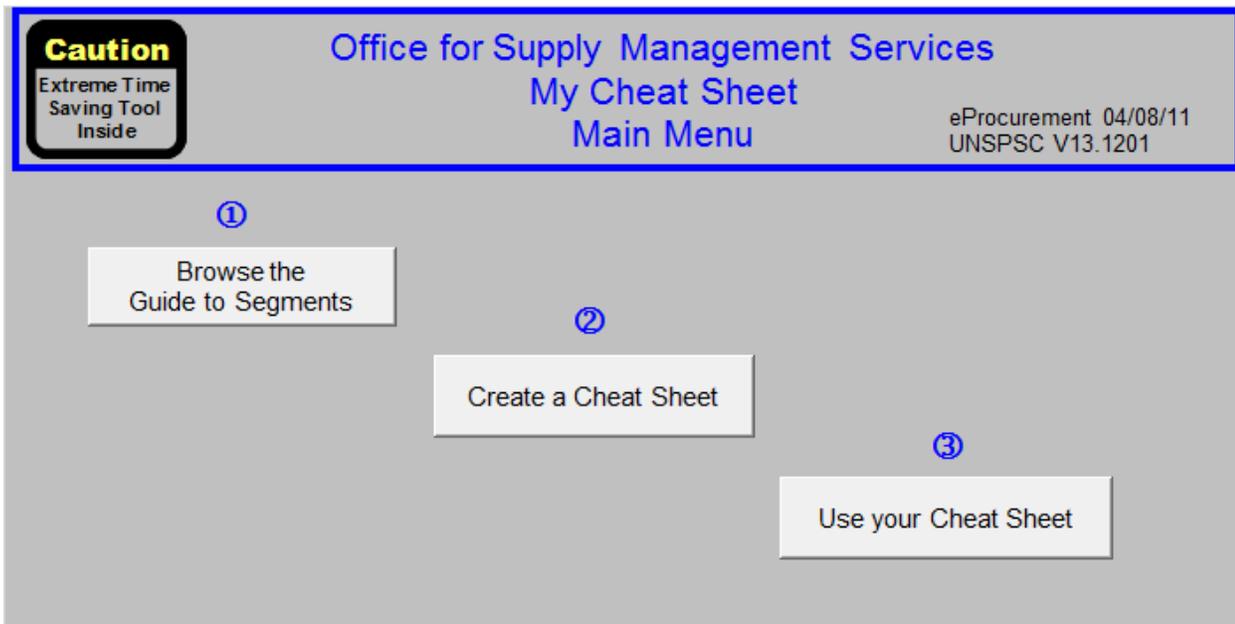
The Four Worksheets

The Excel workbook contains four worksheets that are identified at the bottom of the screen.



Main Menu

The Main Menu provides an easy way to go to any of the worksheets and is the starting place whenever My Cheat Sheet loads. The **Main Menu** is the first worksheet tab and can easily be accessed at any time by clicking on it.



Overview of the UNSPSC

The UNSPSC is an 8-digit code; comprised of four parts (each part has two digits). The codes are hierarchical, similar to an outline. As you get deeper in the outline, there is more detail. The most detail is at the commodity level (includes both goods and services). The four parts are:

1. Segments (general)
2. Family
3. Class
4. Commodity (detail)

Example:

| | <u>Segment</u> | <u>Family</u> | <u>Class</u> | <u>Commodity</u> |
|----------------------|--|--|-------------------|-----------------------|
| | Information Technology Broadcasting and Telecommunications | Computer Equipment and Accessories | Computers | Notebook computers |
| <u>UNSPSC</u> | 43 000000 | 4 321 0000 | 4321 15 00 | 432115 03 |



What is the 6 or 8-digit level?

You may hear this term from time-to-time. While all UNSPSCs are 8-digits, if the Commodity level is not specified, then the last 2-digits will be zero. In the above example “Computers” is at the 6-digit-level, while “Notebook Computers” is specified at the full 8-digit level.

Guide to Segments

The list of UNSPSC Segments is included primarily to provide an easy way to navigate the comprehensive and lengthy list of codes. Because the segment name may not always be descriptive, a list of “common terms” was developed for clarification. Modify this list in any way that best meets the needs of your organization.

| What Goods Or Services Do You Need To Find? | Look For It Under This UNSPSC Segment Title |
|--|---|
| ***** List Below is for GOODS ***** | |
| Clothing, luggage, footwear | Apparel and Luggage and Personal Care Products |
| Heavy construction machinery and equipment (includes demolition) | Building and Construction Machinery and Accessories |
| Chemicals, waxes, oils, solvents | C |
| Cleaning and janitorial supplies, equipment, water treatment | C |
| Automobiles, cars, fleet vehicle contract, station wagon, trucks, sport utility vehicle, dump truck, end, box, delivery, van, refrigerator (fish), tractor, full track, low speed, wheeled, mowing | Commercial and Military and Private Vehicles and their Accessories and Components |
| Public safety, fire protection, weapons and ammunition | Defense and Law Enforcement and Security and Safety Equipment and Supplies |

Change these as needed to meet the needs of your organization

List of typical items or common terms found under the UNSPSC Segment

Creating a Cheat Sheet

As discussed earlier, this version comes pre-loaded with a Cheat Sheet of approximately 100 codes to help you start. It represents the most commonly purchased goods and services. This list can be tailored to meet your needs or simply erased to allow the building of a brand new Cheat Sheet.

Creating a Cheat Sheet is quite simple, as there are only a few steps:

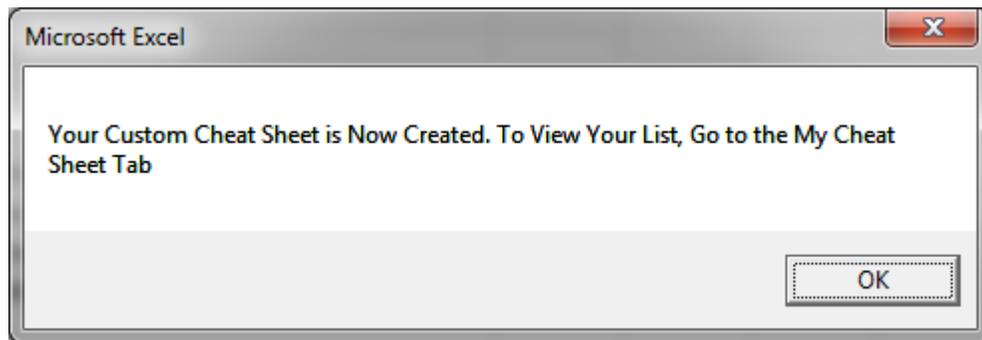
1. Choose a Segment Title from the drop-down list
2. Click the "Find UNSPSC Segment" button; and
3. Browse the list of codes, placing an "X" next to any line to be added to the "Cheat Sheet". Ensure that you have pressed the "Enter" key after typing your last "X". If not, the "Create My Cheat Sheet" button may not work until you do so; and
4. Press the "Create My Cheat Sheet" button.

Step #2 may take a few minutes, or perhaps an hour or two, depending on who is using the "Cheat Sheet". For example, if a person is responsible for adding purchases to Procurement with a wide-variety of goods or services, that person may step through many UNSPSC Segments. As a contrast, a Buyer specializing in information technology goods and services may only need a few minutes to create their list.

The screenshot shows a software interface for selecting UNSPSC segments. At the top, there is a yellow header with the text "UNSPSC Segment Titles". Below this is a dropdown menu currently showing "Information Technology Broadcasting and Telecommunications". To the right of the dropdown is a legend with four numbered steps: 1. Choose Segment, 2. Go To Segment, 3. Mark Selections, and 4. Create Cheat Sheet. Below the legend are three buttons: "Clear X's", "Find UNSPSC Segment", and "Create My Cheat Sheet". A blue callout box points to the "Clear X's" button with the text "To clear Starter Set, click here". Below the buttons is a table with columns: Line, Segment Title, Family Title, Class, Class Title, Commodity, and Commodity Title. The table contains several rows of data, including "Live Plant and Animal Material" and "Live animals" with various class and commodity codes. Four blue callout boxes provide step-by-step instructions: Step 1 (Click on list of Segment Titles), Step 2 (Click on Find UNSPSC Segment), Step 3 (Browse and select lines by entering a "X" in first column), and Step 4 (Click on Create My Cheat Sheet button. Easy, Done!).

| Line | Segment Title | Family Title | Class | Class Title | Commodity | Commodity Title |
|------|--------------------------------|--------------|----------|-------------|-----------|-----------------|
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101501 | Cats |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101502 | Dogs |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101504 | Mink |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101505 | Rats |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101510 | Mice |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101511 | Swine |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101512 | Rabbits |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101513 | Guinea pigs |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101514 | Primates |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101515 | Armadillos |
| | Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101516 | Cattle |

After pressing the "Create My Cheat Sheet" button, the following message will indicate that the process is done. Again, if you press the "Create My Cheat Sheet" button and nothing happens, make sure that you have pressed "Enter" after the last line selection ("X").



My Cheat Sheet

The My Cheat Sheet worksheet contains all of the UNSPSCs selected with an “X”. Every time you press the “Create My Cheat Sheet” button, this list will be overwritten with the new list.

| Family Title | Class | Class Title | Commodity | Commodity Title |
|-------------------------------|----------|-----------------------|-----------|-------------------------------|
| Motor vehicles | 25101500 | Passenger motor veh | 25101503 | Automobiles or cars |
| Motor vehicles | 25101500 | Passenger motor veh | 25101504 | Station wagons |
| Motor vehicles | 25101500 | Passenger motor veh | 25101505 | Minivans or vans |
| Motor vehicles | 25101500 | Passenger motor veh | 25101507 | Light trucks or sport utility |
| Motor vehicles | 25101600 | Product and material | 25101601 | Dump trucks |
| Motor vehicles | 25101600 | Product and material | 25101602 | Tow trucks |
| Motor vehicles | 25101600 | Product and material | 25101604 | Delivery trucks |
| Motor vehicles | 25101600 | Product and material | 25101610 | Water trucks |
| Motor vehicles | 25101900 | Specialized and recre | 25101901 | Agricultural tractors |
| Components for information te | 43201800 | Media storage device | 43201803 | Hard disk drives |
| Computer Equipment and Acc | 43211500 | Computers | 43211501 | Computer servers |
| Computer Equipment and Acc | 43211500 | Computers | 43211502 | Notebook computers |
| Computer Equipment and Acc | 43211500 | Computers | 43211503 | Desktop computers |
| Computer Equipment and Acc | 43211500 | Computers | 43211504 | Bar code reader equipmen |
| Computer Equipment and Acc | 43211500 | Computers | 43211505 | Liquid crystal display LCD |
| Computer Equipment and Acc | 43211500 | Computers | 43211506 | Inkjet printers |
| Computer Equipment and Acc | 43211500 | Computers | 43211507 | Laser printers |
| Computer Equipment and Acc | 43212100 | Computer printers | 43212107 | Plotter printers |
| Computer Equipment and Acc | 43212100 | Computer printers | 43212110 | Multi function printers |
| Data Voice or Multimedia Net | 43222500 | Network security equ | 43222501 | Firewall network security e |

The "Cheat Sheet" presents an easy view all the way down to the 8-digit Commodity. Print this list or simply keep it open during data entry into eProcurement. Copy the UNSPSC and paste it into eProcurement



What to do with the list?

The list is created to assist data entry into KFS. For some, printing the list and entering each UNSPSC is preferred. For others, keeping the My Cheat Sheet worksheet open and copying a code and pasting it into KFS is a better option to reduce typing errors.

Updates to the UNSPSC and KFS

What Happens When KFS Adds A New Version?

Periodically (estimated at no more than twice/year), the UNSPSC list will be updated in KFS due to the UNSPSC organization (www.unspsc.org) adding new codes. Unfortunately, there is no automated way to transfer either your key words (Segments list) or your "X's" that created your 'Cheat Sheet'. Therefore, both will have to be added back to the new version. The "Cheat Sheet" will need to be created by adding the "X's" to the new list and regenerating a "Cheat Sheet". Here is one procedure that might help you:

1. Open your current "Cheat Sheet" worksheet.
2. Open the new "My Cheat Sheet" worksheet.
3. Copy the first commodity code from your current "Cheat Sheet" and then perform a "Find" of that code on the new list (Start Here worksheet) used to create a "Cheat Sheet.
4. Place an "X" next to that line and repeat steps 3 and 4 until done.

| |
|--|
| Each new version of My Cheat Sheet will contain a starter set of Segment key words and a "Cheat Sheet" with the most commonly used UNSPSC. |
|--|

Maintenance by Procurement Services (New UNSPSC Version)

This information is for the Procurement Services team only. It is not performed by users of the My Cheat Sheet tool. It is included here only for convenience and to keep all pertinent information regarding this tool in one place.

Required Steps

A new version of the UNSPSC will require updates to both the Segments list (Guide to Segments) and the entire UNSPSC set ("Start Here").

1. Segments List

The Segments list is organized by Goods and Services. Within each of these groupings, the segments are sorted alphabetically in ascending order. If the changes to the segments list are minor, keep the existing list and modify as needed using existing "key words" in Column A.

If the changes are substantial, delete the existing list in Columns A and B by highlighting it and pressing the "delete key".

Do not delete rows as this will corrupt the entire worksheet!

To create a new segments list, follow these steps:

1. In the Excel worksheet with the new version of the UNSPSC, create a blank worksheet.
2. Copy the list of Segments into this worksheet, using Column B.
3. Delete any information below the last Segment Title.
4. Ensure that the list is organized and sorted as described above.
5. Copy the "key words" from the old version of My Cheat Sheet and match them to the segments list. Add new "key words" as required. Use Column A.
6. Ensure that the "***** List of Goods *****" or ***** List of Services *****" is before its group in the temporary worksheet.
7. Copy the sorted segments list, with its key words and replace columns A and B in the My Cheat Sheet worksheet.

2. Replacing the Entire UNSPSC

The "Start Here" worksheet contains the entire list of UNSPSC. To replace the list, first highlight the existing list (Columns A-G only, starting with the first data row right below the headings) and press the "delete key".

Do not delete rows as this will corrupt the entire worksheet!

In the Excel worksheet with the new version of the UNSPSC, make a copy of the worksheet tab that contains the entire list of codes with Segments, Family, Class and Commodity. Several columns will be deleted. The only columns to keep are as follows:

- Segment Title
- Family Title
- Class (UNSPSC number)
- Class Title
- Commodity (UNSPSC number)
- Commodity Title

| Segment Title | Family Title | Class | Class Title | Commodity | Commodity Title |
|--------------------------------|--------------|----------|-------------|-----------|-----------------|
| Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101501 | Cats |
| Live Plant and Animal Material | Live ani | | | 10101502 | Dogs |
| Live Plant and Animal Material | Live ani | | | 10101504 | Mink |
| Live Plant and Animal Material | Live ani | | | 10101505 | Rats |
| Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101506 | Horses |
| Live Plant and Animal Material | Live animals | 10101500 | Livestock | 10101507 | Sheep |

These are the only 5 columns to be used from a version of the UNSPSC

Copy the above information into columns B-G in the “Start Here” worksheet. Ensure that the “Xs” used to create a sample “Cheat Sheet” in the previous version are entered into this version. The final step, after testing that all functionality works, is to update the date and UNSPSC version on the Main Menu.