SETUP GUIDE

Supplier Web UI

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StiboSystems

MASTER DATA MANAGEMENT

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Supplier Web UI Setup Guide

Prior to STEP 8.2, users could choose between a number of Web UI templates when creating a Web UI. While these templates are now legacy functionality and not applicable to STEP 8.2+ systems, the information in the sample Web UI topics may benefit current users.

See the **Web User Interfaces / Web UI Getting Started** documentation for more information on Web UI functionality, which may not be reflected in this topic / section.

Note: For current supplier-specific functionality, search for "supplier item Web UI" (using double quotes) in online help documentation.


Prerequisites

This setup guide explains how to set up a Supplier Web UI, but first, a Supplier Web UI configuration and a matching workflow must exist on the system.

Supplier Web UI Principles

The Supplier Web UI differs from other Web UIs by allowing external data suppliers to create and maintain data. Each supplier can only see data that is created / maintained by them. This solution requires three main things to be setup on the system.

1. A Supplier User Group for each supplier: the individual Supplier Users must be created below a Supplier User Group. When the Supplier User Group is created, the supplier's classification structure is automatically created. This process is defined in the **Creating a Supplier User Group** section below.

2. A Classification structure for each supplier: created automatically when the Supplier User Group is created. The classifications will be used to collect the supplier's products, assets, and batches. Only the corresponding supplier's users can see these objects. The supplier classification structure looks like this:
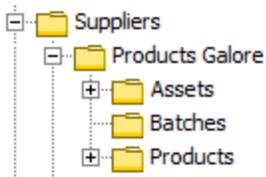

3. A Product to Classification link type: used to link the supplier's products into the supplier's classification structure (i.e., to the products folder and the batch folders).
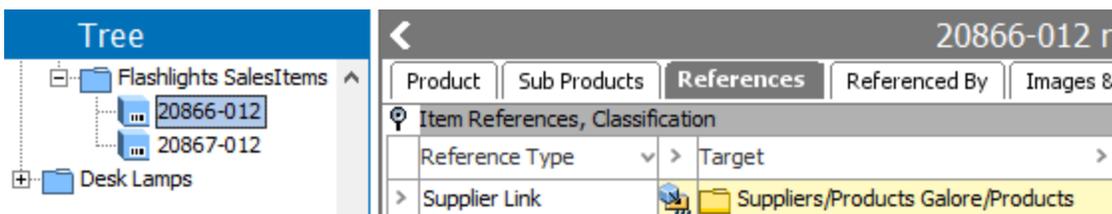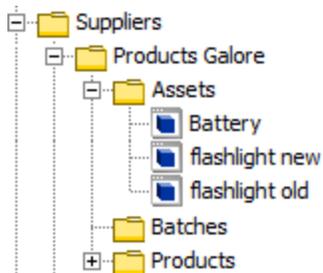
How it works

When a supplier user creates a new item through the Supplier Web UI, the item will be created in the blue Product Hierarchy and then linked to the supplier's classification structure:
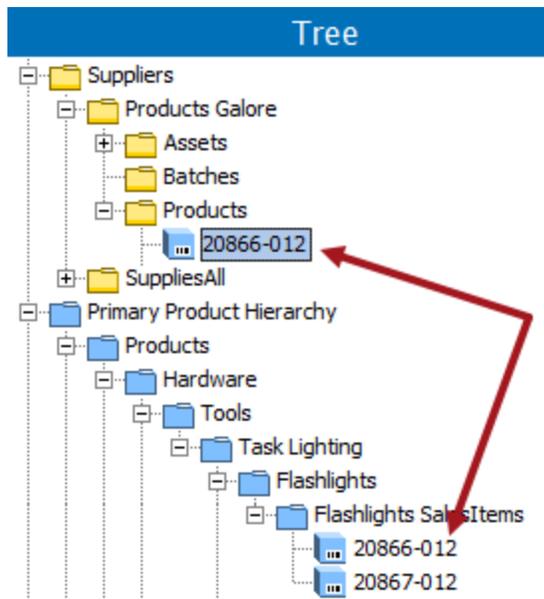
When a supplier user uploads a new asset through the Supplier Web UI, the asset will be placed in the supplier's classification structure (the Asset folder):

When a supplier user creates a new batch through the Supplier Web UI, a classification folder will be created, representing the new batch. These batch folders will be placed below the supplier's Batches folder:
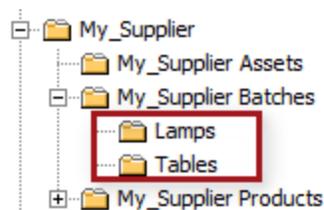
When a supplier user adds an item to a batch through the Supplier Web UI, the item will be linked to the corresponding batch classification folder:
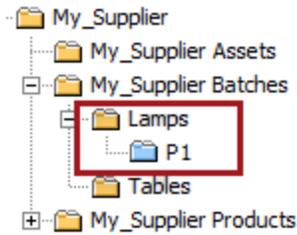
Disable Batches Folder

Use of the Batches folder is optional. If it is not needed, it can be disabled manually.

1. In **System Setup**, click the **Users & Groups** node.
2. Navigate to the **Web UI Settings** flipper.
3. Clear the values for the 'Batches classification object type' and 'Batch classification object type' fields.

Note: Supplier nodes can work without the batches folder, but it is required for the auto-generation of the structure as explained below. When the batches folder is displayed, both asset and product folders must exist.
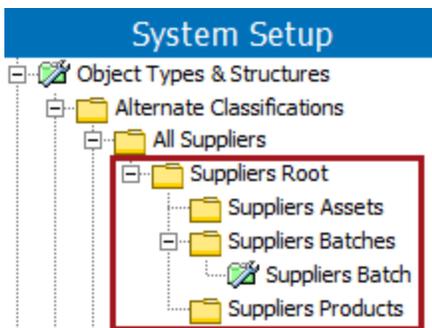
Auto-generate the Supplier Classification Structure

In order to have the supplier classification structure automatically created, a number of classification object types must be provided as defined below.

1. In System Setup click the **Users & Groups** node.
2. Navigate to the **Web UI Settings** flipper.
3. Provide the object type IDs for the following parameters:
    - Web UI supplier classification object type
    - Web UI supplier products classification object type
    - Assets classification object type
    - Batches classification object type
    - Batch classification object type

The standard classification object types used for this are these:

Set the Product to Classification Link Type

Products created through the Supplier Web UI automatically get linked to the supplier's classification structure. This is done by using a specified Product to Classification link type.

1. In System Setup click the **Users & Groups** node.
2. Navigate to the **Web UI Settings** area.
3. Enter the ID of the link type in the **Link type for vendor classification to product link** parameter.

System Settings	

System Settings | Log

♀ Web UI Settings

Name	>	Value	>
> Control override meta attribute			...
> Default context		Context1	
> Default workspace		Main	
> Web UI supplier classification object type		SuppliersRoot	
> Web UI supplier products classification object type		SuppliersProducts	
> Assets classification object type		SuppliersAssets	
> Batches classification object type		SuppliersBatches	
> Batch classification object type		SuppliersBatch	
> Excel-template asset		QuickSheetTemplate	
> Proof view stylesheet attribute			
> Step-users Web UI batches folder		SuppliersBatches	
> Step-users Web UI assets folder		SuppliersAssets	
> Context Help metadata attribute		AttributeHelpText	
> Link type for vendor classifiction to product link		SupplierLink	
> Enable all-view for users that are a member of multiple suppliers		Y	

View Across Multiple Suppliers

When a supplier user is a member of more than one supplier group, a view can be enabled that allows access to all suppliers via the 'Enable all-view for users that are a member of multiple suppliers' parameter. When set to Y, all suppliers are accessed with the same view. Additional setup is required as defined in the **Additional All-View Web UI Setup** section below.

Additional All-View Web UI Setup

After having changed the 'Enable all-view for users that are a member of multiple suppliers' parameter to Y in workbench, additional changes must be made in Web UI to activate the all-view across multiple suppliers. The following components can be used in the Web UI for the All-View:

- Supplier Field
- Supplier Product Assets
- Create Supplier Product Action
- Create Supplier Product Toolbar Action and Create Supplier Asset Toolbar Action

Supplier Field

To be able to create products for a specific supplier group, the Supplier Field component must be added to the initiate screen. This allows all accessible supplier groups to be chosen when creating a product. Otherwise, a new product will be added to the first in a list of available supplier groups.

Supplier Product Assets

To be able to upload an asset to a specific supplier group or to all accessible supplier groups, the Supplier Product Assets action should be used to support all-view across multiple suppliers functionality.

After adding the row, select the reference type. The name of the reference type is used as the label for the row by default, or you can type a custom label.

Create Supplier Product Action

To be able to create new products for a specific supplier while in the blue product hierarchy, the Create Product Action must be replaced with the Create Supplier Product Action to support all-view across multiple suppliers functionality.
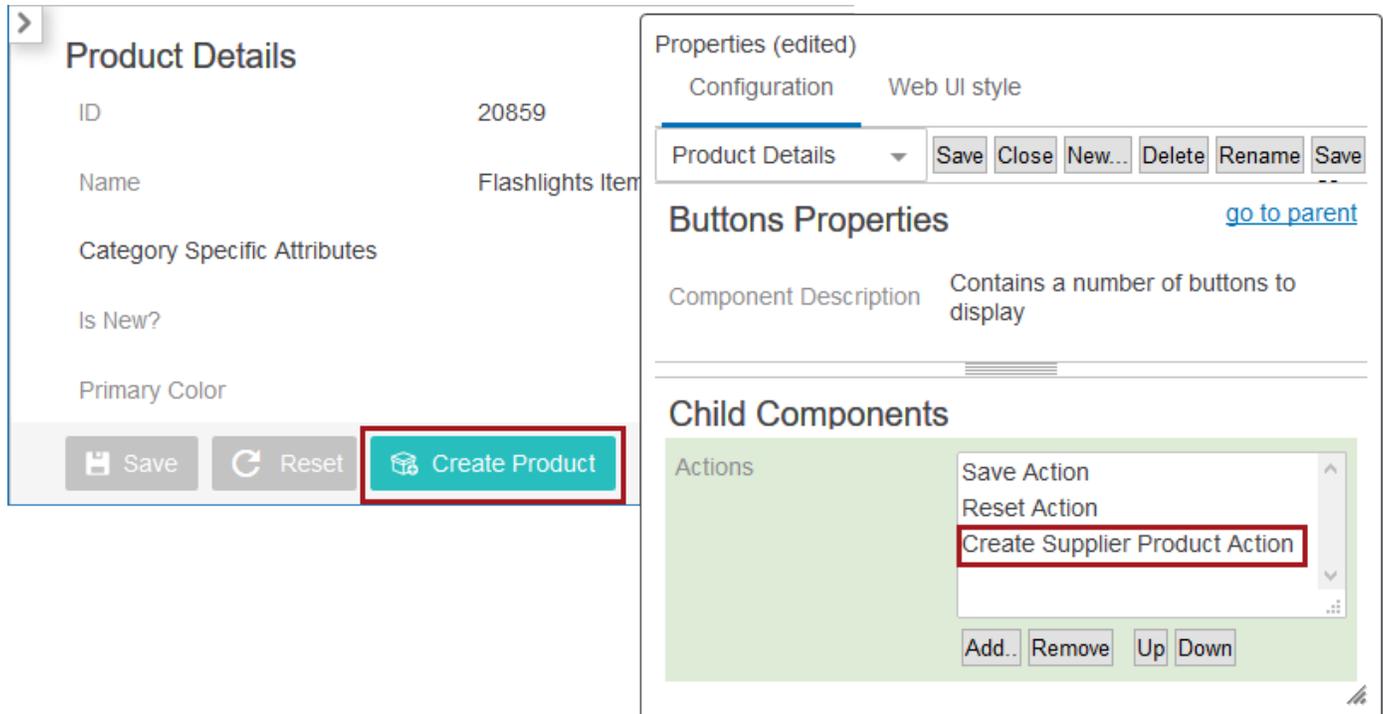
Create Supplier Product Toolbar Action and Create Supplier Asset Toolbar Action

For these toolbar actions, you must be using the multi-reference editor which allows it to identify valid reference types. These toolbar actions are not available in the yellow classification hierarchy. No additional configuration is required when adding these actions to a screen.

- The 'Create Supplier Product Toolbar Action' toolbar action creates products in the blue product hierarchy.
- The 'Create Supplier Asset Toolbar Action' toolbar action applies assets to products in the blue product hierarchy.
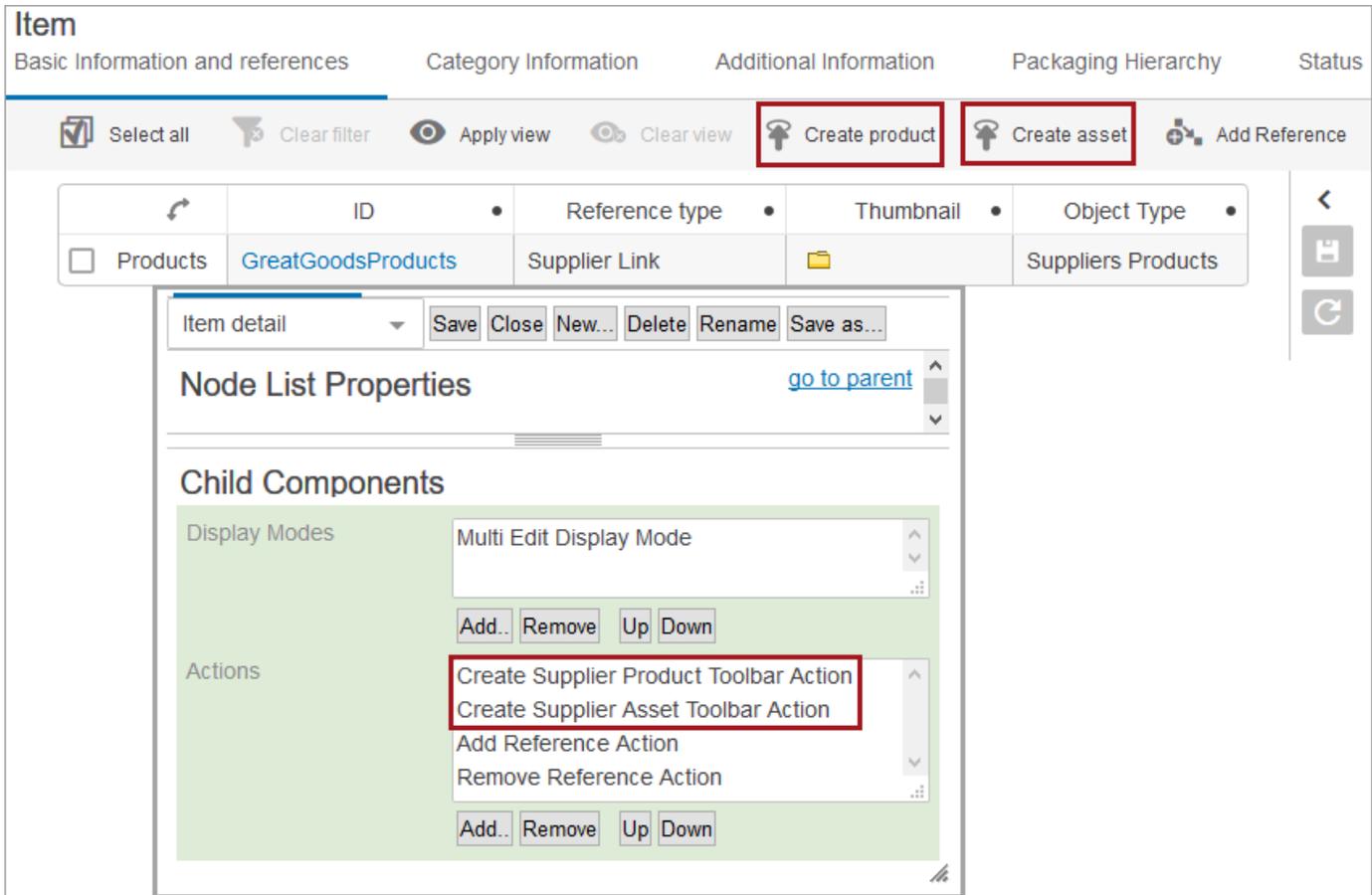
Create a Supplier User Group

Once the classification object types are set, a Supplier User group can be created. A Supplier User Group is a special user group where a supplier can have each supplier user created below. Each supplier must have their own Supplier User group.

Note: In a workflow, supplier users can only see objects that are **directly** linked to their supplier classification. Objects that are children to blue folders within a classification folder are not available to supplier user workflow tasks. For more information, see the **Moving Tasks through a Workflow in Web UI** topic in **Web User Interfaces / Web UI Getting Started** documentation or the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** documentation.

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1. In System Setup, select the **Users & Groups** node and right-click.
2. Select **New Supplier**. A Create Supplier wizard appears.
3. Enter the ID and the Name of the supplier.

4. Use the Browse tab to find and select the position in the classification hierarchy where the suppliers classification structure should be created. You can also use the Search tab to type in a specific node.

5. Automatically generated IDs and names for the supplier root, product folder, assets folder, and batches folder are displayed. However, IDs and Names can be modified as needed.

6. Click the **Finish** button. The Supplier User Group is now created and the supplier's classification structure is also created. Users must be added to the supplier user group to enable the supplier functionality.

7. In System Setup, click the new supplier user group to display the editor.

8. On the Group tab, Users flipper, click the **Add User to Group** link and select the necessary users.

Note: You must provide privileges to the supplier user group once it is created. For more information, see the **Privilege Rules** topic in the **System Setup / Super User Guide** documentation.

Setting Up Smartsheet

Smartsheet is an Excel format that can be used to initiate and maintain products via the Supplier Web UI. For more information, see the **Excel Smartsheet Format** section of the **Data Exchange** documentation.