



USER GUIDE

Getting Started

Rel 10.2-MP3 (September 21, 2021)

Table of Contents

Table of Contents	2	Adding a Bookmark	48
Getting Started	7	Removing a Bookmark	51
Introduction	8	Editing a Bookmark	52
STEP Terminology	9	Copying a Bookmark to the Clipboard	54
Basic STEP Concepts	23	Menu Items	55
Object Types Overview	23	File Menu	56
Object Super Types	23	Edit Menu	64
Object Types Versus Object Instances	24	View Menu	69
Object Super Types	31	Navigate Menu	76
Assets	31	Format Menu	80
Classifications	32	Maintain Menu	84
Entities	33	Window Menu	93
Products	34	Help Menu	95
Publications	34	Object Editor	97
Accessing STEP System Information	36	Search Tab	98
'About STEP' Page	36	STEP Workflow Tab	100
Detailed Version Information	37	Tasks	100
System Snapshot and Diagnostics	38	Profile	103
Package Links	38	System Setup Tab	104
STEP Workbench UI	39	Toolbar	105
BG Processes Tab	41	Stibo Systems Logo	105
BG Processes Displayed	42	Context List	105
Background Process Tab	42	Workspace Toggle Button	105
Queue Info Tab	44	Navigation Buttons	106
Bookmarks Tab	46	Address Field	106
		Viewing Mode Buttons	106
		Normal mode	106

Translation mode	106
Workspace mode	107
Context mode	107
Revision mode	107
Goto Field	107
Tree Tab	108
Object Maintenance in Tree	110
All Objects	111
Approval of Objects	112
Approval Overview	112
In Use and Not In Use Objects	113
Approving an Object	115
Data Ownership	115
Approve an Object	115
Partial Approve	117
Suppress Re-translation	120
Check Approve	120
Approve Recursively	121
Approval Feedback	122
Approve Object Feedback	123
Partial Approve Feedback	123
Approve Recursively feedback	124
Approved Symbols and Messages	129
Approved Status Symbols	129
Approved Status Messages	130
Creating Objects in Tree	132
Deleting Objects in Tree	135

Editing Objects in Tree	138
Multi-Editors	140
Right-Click Editing Options	143
Additional Information	144
Inline References in Attribute Values	145
Inserting an Inline Reference using Workbench	145
Inline References and Multi-Valued Attributes	148
Copying Attribute Values as Inline References	149
Inserting an Inline Reference using Web UI ..	151
Assets	152
Classification of Assets	152
Asset File Type Designation	153
Asset Objects and Digital Media Files	154
Image Variants and Handling	155
More Information	155
Maintaining Assets	156
Creating Assets	156
Asset Editor	157
Images & Documents	157
References	159
Referenced By	160
Status	161
State Log	161
Tasks	161
Asset Dimension Dependencies	161
Custom Asset Metadata	163

Linking Assets to Products	167
Classifications	173
Classification Editor	173
Sub Products	173
References	176
Referenced By	178
Images & Documents	179
Tables	179
Status	179
State Log	180
Tasks	180
Collections	181
Creating Collections	184
Creating a Collection from Search	184
Creating a Collection from File Import	186
Creating Collection Groups	189
Creating a Collection Group	189
Maintaining Collections	191
Delete	191
Edit Search Criteria	193
Export Data Below	194
Refresh Data	195
Run Bulk Update	196
Republish	197
Search Below	198
Collection Properties and Statistics	200
Collection Tab	200

Description Flipper	200
Statistics Flipper	201
Data Profile Tab	202
Log Tab	204
Entities	205
Entity Hierarchy	205
Entity Editor	206
Entity References, Referenced By, and Status Tabs	207
References Tab	207
Referenced By Tab	209
Status Tab	210
Products	212
Product Hierarchy	212
Product Editor	213
Additional Editors	215
Inheritance in the Product Hierarchy	216
Linking Attributes to Products	217
Working with Inherited Values	220
Images & Documents Tab	222
Interacting with Assets	222
Edit asset	222
Edit reference type	223
Filter the displayed assets	223
Navigate to asset	224
Product Overrides	225
Creating a Product Override	226
Linking Products into a Product Override	227

Removing Products from the Product Override	227
Creating a Subordinate Product Override	227
Referenced By Tab	228
References Tab	230
Status Tab	232
Sub Products Tab	234
Recycle Bin for Tree	236
Revive or Permanently Deleting Objects	237
Schedule Empty Recycle Bin	239
Configuring a Schedule Empty Recycle Bin Operation	239
Navigating and Searching	244
Navigation	245
Expanding a Folder	245
Collapsing a Folder	245
Collapse Tree	245
Goto	247
Bookmarks	250
Standard Navigation Bookmarks	250
Search Bookmarks	250
Accessing the Saved Search Bookmark	251
Editing a Bookmark	252
Removing a Bookmark	252
Search	253
Search Elements	253
Search Options	255
Search Functionality	257

Standard Search Criteria	257
Search Field Typeahead	257
Limiting Results to Matches on IDs	258
Limiting Results to Matches on Name	258
Attribute Value Searches	259
Attribute Value Search Operators	260
Wildcards in Searches	261
Searches in 'Full Text Indexable' Attribute Values	261
Numeric Value Searches for Attributes with Units	262
ISO Date Searches	262
Combining Search Criteria	263
Using 'Exclude' Search Criteria	264
Using the 'OR' Operator	265
Search Result Profiling	267
Search: Advanced Options	269
Search Operations on Entire Result	275
Exporting a Search Result	275
Saving a Search Result as a Collection	275
Bulk Updating a Search Result	276
Search: Data Containers	277
Search: Document Content	285
Search: JavaScript Search	286
Search: Missing Mandatory Values	288
Use Cases	288
Search: Object Type	291
System Setup Object Types	293

Special Types	294
Search: Product Override Search	295
Search: Referenced Assets	299
Checkboxes for Referenced Assets Search	300
Search: References and Referenced By ...	302
References	303
Referenced By	308
References and Referenced By Metadata Attribute Value Searches	310
Search: Revised Objects Changed Since .	311
Search: Sample Result	316
Search: Search Below	318
Search: Search from List	321
Search: Search in Publication Hierarchy ..	330
Search: STEP Workflow	336
Search: Unapproved	339
Search: Unpushed or Failed Assets	342
STEP Workbench Keyboard Shortcuts ...	345
Basic Shortcuts	345
Navigate to Main Side Bar Tabs in Workbench	346
Navigate to Horizontal Tabs within Main Sidebar Tabs	346
General Shortcuts Useful in Workbench	347
Insert Options	348
Linking Options	350
Style Options	350
Flatplanner Shortcuts	351

Getting Started

This section is intended to provide users with an introduction to the STEP system and concepts. Additionally, it provides detailed information needed to perform basic data maintenance tasks in STEP, including detailed descriptions of the workbench interface and search functionality. While geared towards end users, the guide provides information that is necessary for all users to understand as a foundation for more advanced topics.

This guide is centered around STEP Workbench, but the concepts and functionality presented are often applicable to both the workbench and Web UI interfaces. Because of this, it is helpful for users of either interface to be familiar with the material in this guide. For documentation specific to the Web UI, see the **Web User Interfaces** guide.

The Getting Started guide contains the following sections.

- **Introduction:** This section includes a terminology table and an overview of some basic STEP concepts. This material should be understood prior to proceeding through the guide as it lays the foundation for the subsequent topics.
- **STEP Workbench UI:** This section introduces the user to the workbench interface, as well as providing detailed reference information for the various functions, including toolbar actions and menu options.
- **Object Maintenance in Tree:** This section provides an overview of creating, editing, and deleting objects in the workbench, as well as providing detailed information for working with particular types of objects.
- **Navigating and Searching:** This section introduces the user to basic search and navigation functionality in STEP Workbench, as well as providing detailed descriptions of the search criteria available on the Search tab.
- **STEP Workbench Keyboard Shortcuts:** This topic provides a list of keyboard shortcuts that can be used in the workbench.

Introduction

This section introduces the reader to basic STEP terminology and concepts. This information provides a foundation that is key to understanding the subsequent materials.

- **STEP Terminology:** A table defining basic STEP terms, including links to topics with additional information.
- **Basic STEP Concepts:** Introduces some core concepts in STEP to facilitate understanding of the Getting Started and System Setup guides.
- **Object Super Types:** Provides an introduction to the STEP object super types, including links to detailed information for each type.

STEP Terminology

This topic provides definitions for basic STEP terminology that is helpful to be aware of when reading the online help. Links to additional material on related topics are also provided, when appropriate. This should not be considered a complete list of all STEP terms as it is intended to cover only the more commonly used terms that users are likely to encounter throughout the online help.

A

Term	Definition	Further Reading
Action	Type of business rule that can be executed to manipulate data or perform an action. Actions can be executed by various processes and events within the system. For example, at approval of an object, within a workflow (on entry to a state, exit from a state, on the transition between tasks, or when a deadline has been met), as part of an import process, or from a bulk update process.	See the Business Actions topic in the Business Rules documentation.
API	see <i>Public API</i>	See the STEP API Documentation link on the Start Page.
Approval	The process of pushing data from the Maintenance workspace to the Approved workspace in STEP. Approval can be associated with business logic that may prevent approval or may perform automated data updates during approval. Approvals are often the triggers for sending data to downstream systems.	See the Approval of Objects topic in the Getting Started / User Guide documentation.
Asset	Any type of digital media, such as an image, Word document, PDF, Excel file, PowerPoint, JPG, GIF, etc.	See the Assets topic in the Getting Started / User Guide documentation.
Asset Push	A process that exports assets from STEP to a file system. Conversion templates	See the Asset

Term	Definition	Further Reading
	can be applied to transform images, for example from high res to low res, resizing, applying color scales, etc., though assets can also be sent as-is to make them available on the file system.	Push topic in the Digital Assets guide.
Assignee	The user or group to which a task is assigned for work to be performed within a workflow. User states can be assigned directly to a named user or to a user group. When a state is assigned to a user group the task is "offered" to all members of that group. To perform the task associated with the state, a member of the group has to claim the task. Once a task is claimed it is no longer visible in the group task list; only the person who claimed the task is able to see it. A user may subsequently release a task back to the group.	See the Assignees in Workflows topic in the Workflows documentation.
Attribute	A characteristic or detailed piece of information related to a particular object. Attributes can be one of two types, description or specification. Description attributes are available on most object types in STEP, while specification attributes are only available on objects in the Primary Product Hierarchy.	See the Attributes topic in the System Setup / Super User Guide documentation.
Attribute Group	Groups attributes, reference types, and/or link types. Attribute groups can have sub-groups.	See the Attributes Groups topic in the System Setup / Super User Guide documentation.
Attribute Value	The value stored in a particular attribute on a particular object.	See the Attributes topic in the System Setup / Super User Guide documentation.

B

Term	Definition	Further Reading
Bookmark	A placeholder created by the user that serves as a shortcut to a previously viewed location.	See the Bookmarks topic in the Getting Started / User Guide documentation.
Business Rule	Automated piece of programming logic that may implement customer-defined rules, such as validations, automatic updates, notifications, data-driven workflow routing, etc. Also see Condition and Action.	See the Business Rules topic in the Business Rules documentation.

C

Term	Definition	Further Reading
Calculated Attribute	An attribute where the value is calculated according to a specific formula defined for this attribute. The formula may include static text, other attribute values, information from references on the object, and a number of other options.	See the Calculated Attributes topic in the System Setup / Super User Guide documentation.
Category Profile	View in STEP that helps product managers and data analysts to get an overview of an entire section of the Product Hierarchy through various metrics that are displayed in dashboard format.	See the Data Profiles topic in the Data Profiling documentation.
Character Tag	An entry that begins with "<" and ends with ">" such as <check/>. These tags represent characters that may not be found in the special character map in Unicode, or may be used instead of the Unicode character.	See the Tags topic in the System Setup / Super User Guide documentation.
Claim	The action that a user performs to take a task in a workflow out of a group queue and assign to himself / herself.	See the Claiming and Releasing Tasks in Workflows topic in

Term	Definition	Further Reading
		the Workflows documentation.
Classification	A particular type of hierarchy that organizes groups of objects or assets. Objects are linked to classifications via references, and may have references to multiple classifications. Also referred to as "yellow folders."	See the Classifications topic in the Getting Started / User Guide documentation.
Collection	An object that holds a static set of objects, or a dynamic search criteria that can be refreshed as needed to find the latest matching objects. Using collections, the resulting data can be displayed, bulk actions can be performed, or the objects can be exported.	See the Collections topic in the Getting Started / User Guide documentation.
Completeness Score	A measurement within STEP, expressed as a percentage, to indicate the proportion of key data that has been completed for a particular object. This key data is configurable, as is the weighting of importance.	See the Metric Visualization topic in the System Setup / Super User Guide documentation.
Condition	A condition is a type of business rule that evaluates to either true or false, and does not change data. In relation with approval, a condition can act as validation for whether an approval action can be carried out. In relation to workflows, conditions can be used to prevent a transition from being taken if certain conditions are not met.	See the Business Conditions topic in the Business Rules documentation.
Context	A specific filter placed on the system data. Each context is a combination of different dimensions such as language, country, and so forth, for example, English US, French CA, or German DE. Data may vary based on context.	See the Contexts topic in the System Setup / Super User Guide documentation.

D

Term	Definition	Further Reading
Data Model	Basic system configuration defining the allowable structures and make up of data within STEP. Consists of system setup data, including: dimensions, contexts, object types, reference types, keys, component models, attribute groups, attributes, lists of values, units, and tags.	See the System Setup / Super User Guide.
Dimension-Dependent Attribute	An attribute that can have different values for different dimension points, where the actual value is determined by the context in which the attribute is presented.	See the Dimension Dependent Attributes topic in the System Setup / Super User Guide documentation.

E

Term	Definition	Further Reading
Entity	A group of master data that has a specific business meaning. Entities typically store product-neutral data in STEP according to client-specific groupings of information, such as customers, employees, suppliers, and addresses. Entities are also often used to store reference data that is utilized within the system. Entities can be grouped into a hierarchy using reference types that are only valid from an entity object to an entity object. A source object can be displayed as a child of the target object or the target as a child of the source.	See the Entities topic in the Getting Started / User Guide documentation.
Externally Maintained Attribute	A characteristic of an attribute or reference that can be set to 'Yes' or 'No'. A 'Yes' selection indicates that the data point is maintained externally, and a change in it does not trigger a change in approval status and/or a new revision on the STEP object on which the data was changed. A 'No' selection indicates that the data point is maintained internally and a change in it has the potential to trigger a change in the approval status and/or a new revision on the STEP object on which the data was changed.	See the Externally Maintained Attributes topic in the System Setup / Super User Guide documentation.

F

Term	Definition	Further Reading
Function	A type of business rule that allows for input parameters to produce an output. These operations are side-effect free, and it do not change STEP data.	See the Business Functions topic in the Business Rules documentation.

G

Term	Definition	Further Reading
Golden Record	Collection of data from a variety of sources, based on matching, linking, and survivorship rules. The Golden Record is considered the trusted data record, compiled from the various source objects.	See the Survivorship in Match and Merge topic the Survivorship in Match and Link topic in the Matching, Linking, and Merging documentation.
GUI	Graphical user interface. For STEP, this can be the workbench or Web UI. A GUI	See the GUI Setup topic in the System Setup / Super User Guide documentation or the Design Mode Basics topic in the Web User Interfaces / Web UI Getting Started documentation.

H

Term	Definition	Further Reading
Hierarchy	A data structure composed of parents and children.	See the Object Type Hierarchy topic in the Object Types and Structures of the System Setup / Super User Guide documentation.
Hotfolder	File system of folders where data can be dropped for automatic loading into STEP, based on the particular configurations and/or code applied to the hotfolder.	See the IIEP Receiver Methods in the Data Exchange documentation, Configuring an Asynchronous File Exchange Service in the Data Integration documentation (), or Asset Importer in the Digital Assets documentation.

Term	Definition	Further Reading
ID	The unique identifier for all objects within STEP. It cannot be translated or edited once created, and cannot contain special characters.	
Image Conversion	A series of parameters defining the way in which an image is transformed from the standard high resolution asset that exists in STEP to the required downstream format. Several conversion options are available by default, and additional conversions can be added via configuration and/or extensions. Note that conversions change assets as they are pushed from STEP, leaving the originating file unchanged in STEP.	See the Image Conversion Configuration topic in the Digital Assets documentation.
Inbound Integration Endpoint (IIEP)	Communication channel defining how data is received by STEP. Each endpoint defines how data is received from an external system, specifying location, transport protocol, data to be exchanged and other configuration parameters.	See the Inbound Integration Endpoints topic in the Data Exchange documentation.
Integration Endpoint (IEP)	Communication channel between STEP and external systems. See Inbound Integration Endpoint and Outbound Integration Endpoint.	See the Data Exchange documentation.
Inheritance	The ability to make data available in the product or classification hierarchy to lower nodes by linking it to a higher node in the hierarchical structure.	See the Inherited Attributes topic in the System Setup / Super User Guide documentation.

J

K

L

Term	Definition	Further Reading
Library	Set of functions that can be reused in multiple business rules or other libraries. Libraries cannot be called independently and must be referenced from other actions, conditions, or functions.	See the Business Libraries topic in the Business Rules documentation.
Link	A parent/child relationship between objects within the STEP system.	See the Reference and Link Types topic in the System Setup / Super User Guide documentation.
List of Values (LOV)	A validation base type for an attribute that only allows a value to be considered valid if it belongs to a respective list of pre-configured values assigned to the attribute. Also used to refer to the value list itself. LOVs are also referred to as 'Domains' at times.	See the List of Values (LOVs) topic in the System Setup / Super User Guide documentation.
Localized Value	An attribute value that is set directly on an object and is not inherited from any level above in the hierarchy.	See the Inherited Attributes topic in the System Setup / Super User Guide documentation.

M

Term	Definition	Further Reading
Mandatory Attribute	Indicates that the product and all its sub-products must have a value for the specified attribute in order for the object to be approved.	See the Mandatory Attributes topic in the System Setup / Super User Guide documentation.
Multi-Valued Attribute	An attribute that can contain more than one value for a specific object.	See the Editing Multi-Valued Attributes topic in the System Setup / Super User Guide documentation.

N

O

Term	Definition	Further Reading
Object	An element within the system, for example, a product, image, classification, attribute, workflow, business rule, etc.	See the Basic STEP Concepts topic in the Getting Started / User Guide.
Object Type	A specific label for levels within a taxonomy, given to different elements within the system. Nearly every object in STEP is labeled with an object type to help identify what it is (i.e., a product or entity rather than an image, a TIF rather than a PDF, etc.). This includes entities, products, product categories, alternate hierarchies, images and other assets, attributes, and LOVs. Through the use of object types, system administrators can control how rigid or loosely defined the database will be in terms of object creation and where objects are allowed to 'live' and/or be used. This labeling also becomes very important when working with exported data so that each type of object in STEP can be identified for special handling in web applications or other uses outside of STEP.	See the Basic STEP Concepts topic in the Getting Started / User Guide.
Orphan Attribute	A specification attribute that has a value, which has been deleted from / not linked to a product node or classification and is denoted by italics.	See the Linking Orphan Attributes topic in the System Setup / Super User Guide documentation.
Outbound Integration Endpoint (OIEP)	Communication channel defining how data is sent by STEP. Each endpoint defines how data is sent to an external system, specifying location, transport protocol, data to be exchanged and other configuration parameters.	See the Outbound Integration Endpoints topic in the Data Exchange documentation.

P

Term	Definition	Further Reading
Postprocessor	A plugin component within the IEP framework that allows STEP to act on the result of the import / export such as starting workflows, sending notifications, etc.	See the IIEP Configuration Flipper and the OIEP Output Templates Flipper topics in the Data Exchange documentation.
Preprocessor	A plugin component within the integration endpoint framework that allows STEP to modify the message prior to import / export. It can be used for various functionality such as pre-validation, format conversion, filtering, etc.	See the IIEP Configuration Flipper and the OIEP Output Templates Flipper topics in the Data Exchange documentation.
Primary Product Classification (PPC)	Hierarchy that allows for different types of objects to be stored once in the database; each object within this hierarchy has a unique ID / identifier and may have only one location within the hierarchy. Also referred to as the 'blue hierarchy'.	See the Object Type Hierarchy topic in the System Setup / Super User Guide documentation.
Product	One of the object super types, referring to any object within the Primary Product Classification (blue hierarchy).	See the Products topic in the Getting Started / User Guide documentation.
Product Template	InDesign templates that determine what type of data will appear on a printed page, including the positioning and styling.	See the Product Templates topic in the STEP Publisher documentation.
Product Variant	Data type used to model multiple variants of a similar object. For example, T-shirts in various sizes and colors could all be variants of a single product.	See the Product Variants topic in the System Setup / Super User Guide documentation.
Proof View	A tab in workbench or Web UI that displays a product template view ('proof') of a selected node (typically a product) without the user needing to access InDesign.	See the Proof View section of the STEP Publisher documentation.
Publication	One of the super types, referring to objects in the publication (green) hierarchy.	See the Publication Hierarchy section of the STEP Publisher documentation.

Term	Definition	Further Reading
Public API	The set of server-side functions that have been exposed to be used in the business logic. This includes many functions to create, get, and set data, such as values and references. It also includes various methods for logging as well as sending emails.	See the STEP API Documentation link on the Start Page.
Purge	Removal of an object from the database. Following purge, an object cannot be revived.	See the Revisions topic in the System Setup / Super User Guide documentation.

Q

Term	Definition	Further Reading
Queue	The mechanism within the IIEP framework that allows messages to be processed in an asynchronous way. The queuing concept allows separating processes from different integration endpoints as well as controlling the degree of parallel imports (a queue size of one guarantees sequential import, while a queue size larger than one allows parallel processing of multiple messages for increased throughput where sequential execution is not required).	See the Background Processes and Queues topic in the System Setup / Super User Guide documentation.

R

Term	Definition	Further Reading
Reference	An association between objects within the STEP system.	See the Reference and Link Types topic in the System Setup / Super User Guide documentation.

S

Term	Definition	Further Reading
Special Character	A character that cannot be found on a standard keyboard but can usually be found in the Windows character map. Example: Trademark Symbol - ™	See the Tags topic in the System Setup / Super User Guide documentation.
State	A step within a workflow to which a specific user, user group, or system can be assigned to complete the task(s) associated with the state.	See the Creating a Workflow topic in the Workflows documentation.
STEP	Stibo Enterprise Platform master data software application that provides business managers a single source database to store, manage, and re-purpose product information for publication or syndication.	
STEP'n'design	STEP's plugins for InDesign that allow data from the STEP database to be pulled onto pages.	See the STEP Publisher documentation.
STEPXML	The native XML language for STEP, which can be used for importing / exporting STEP data, as well as transferring configurations between STEP systems.	See the STEPXML Format topic in the Data Exchange documentation.
Super type	A major category of data within STEP including: Asset, Classification, Entity, Product, and Publication. See the specific definition for each super type for additional information.	See the Object super types topic within the Getting Started / User Guide.
Superseded	The 'Superseded' status displays with affected components and serves as guidance to admin users selecting which components to implement when configuring their Web UI.	
Super User	A user that is given administrative privileges within the STEP system.	See the Actions Sets topic in the System Setup / Super User Guide documentation.

T

Term	Definition	Further Reading
Task	The work and/or action that must be completed within a specific workflow state (whether by a user or via automation).	See the Working with Tasks in Workflows topic in the Workflows documentation.
Transition	The change of tasks from one state to another within a workflow.	See Creating a Workflow in the Workflows documentation.

U

Term	Definition	Further Reading
Unique Key	A unique key is a system entity that represents a specific object in the STEP system. The entity is composed of one or more data points, whether utilized as-is or in a combined and/or transformed format using a specified formula. There can be exactly one record for each object for each defined key. No two objects with the same unique key for an active key can exist.	See the Unique Keys topic in the System Setup / Super User Guide documentation.
User Permissions	Rules that allow or restrict users from performing certain functions within the system.	See the Privilege Rules topic in the System Setup / Super User Guide documentation.

V

Term	Definition	Further Reading
Validation Base Type	A characteristic of attributes that identifies the format of the accepted data for the attribute value, such as whether the value is a date, integer, fraction, text, LOV, etc.	See the Validation Rules topic in the System Setup / Super User Guide documentation.

W

Term	Definition	Further Reading
Web UI	A web-based interface to access the STEP database in order to read, edit, or download data and assets. Multiple Web UIs can be configured for each STEP installation.	See the Web User Interfaces topic in the Web UI documentation.
Workbench	An interface for managing data in STEP, as well as carrying out administrative functions.	See the STEP Workbench UI topic in the Getting Started / User Guide documentation.
Workflow	Business process(es) modeled as a series of states and tasks that can be executed by users and/or automatic processes within the STEP system. Workflows prompt the next step of a process to be started, by either creating a task for a user, or sending an alert. Workflows may contain a number of process steps or tasks, as well as business logic.	See the Workflows documentation.
Workspace	A set of independent 'copies' of the database objects that provides a revision-specific view of objects. Workspaces are organized into separate areas including Main and Approved. The Main workspace is where data maintenance takes place. The approved workspace is a non-editable snapshot of data that has been determined to have been acceptable for publishing to downstream systems.	See the Workspaces topic in the System Setup / Super User Guide documentation.

X

Y

Z

Basic STEP Concepts

This topic introduces the reader to some fundamental STEP concepts that provide a foundation for the rest of the material in the Getting Started / User guide, as well as the System Setup / Super User guide. The focus of this topic is on data structures and data management, and is *not* intended to be an introduction to the full capabilities of a STEP system.

Object Types Overview

Technically, nearly everything in STEP is an object, and object types must be defined for which instances of objects can exist. Object types provide a specific label for levels within a taxonomy, given to different elements within the system. Nearly every object in STEP is labeled with an object type to help identify what it is (i.e., a product or entity rather than an image, a TIF rather than a PDF, etc.). This includes entities, products, product categories, alternate hierarchies, images and other assets, attributes, and LOVs. Through the use of object types, system administrators can control how rigid or loosely defined the database will be in terms of object creation and where objects are allowed to "live" and/or be used. This labeling also becomes very important when working with exported data so that each type of object in STEP can be identified for special handling in web applications or other uses outside of STEP. Object types in STEP can largely be divided into two categories:

- **Tree Object Types:** Object types that make up the standard STEP hierarchies accessible on the Tree tab in workbench. Many of these object types can be further grouped into five categories of object types, referred to as the super types. Tree object types are defined in System Setup, but instances of the object types are accessed within the Tree.
- **System Setup Object Types:** Also referred to as Basic Object Types. This category encompasses all of the remaining object types that make up a STEP system. Among many other things, this includes attributes, users, integration endpoints, workflows, and business rules. System Setup object types are defined in System Setup, and instances of the object types are also accessed within System Setup.

More information on object types in general, including how to create and maintain object types, can be found in the **Object Types and Structures** section of the **System Setup / Super User** documentation.

Object Super Types

Each super type has specific characteristics that make it suitable for modeling particular types of data. For example, inheritance of data is available within the Product super type so objects that share data based on common characteristics are typically modeled using this super type. Alternatively, digital media files are housed using the Asset super type, which allows for automatic reading and storing of asset properties such as size and format. Any number of individual object types within each super type can be created. For example, a system may use both an 'Icon' object type and an 'Illustration' object type (along with any number of others) within the Asset super type.

The object super types are:

1. Assets
2. Classifications

3. Entities
4. Products
5. Publications

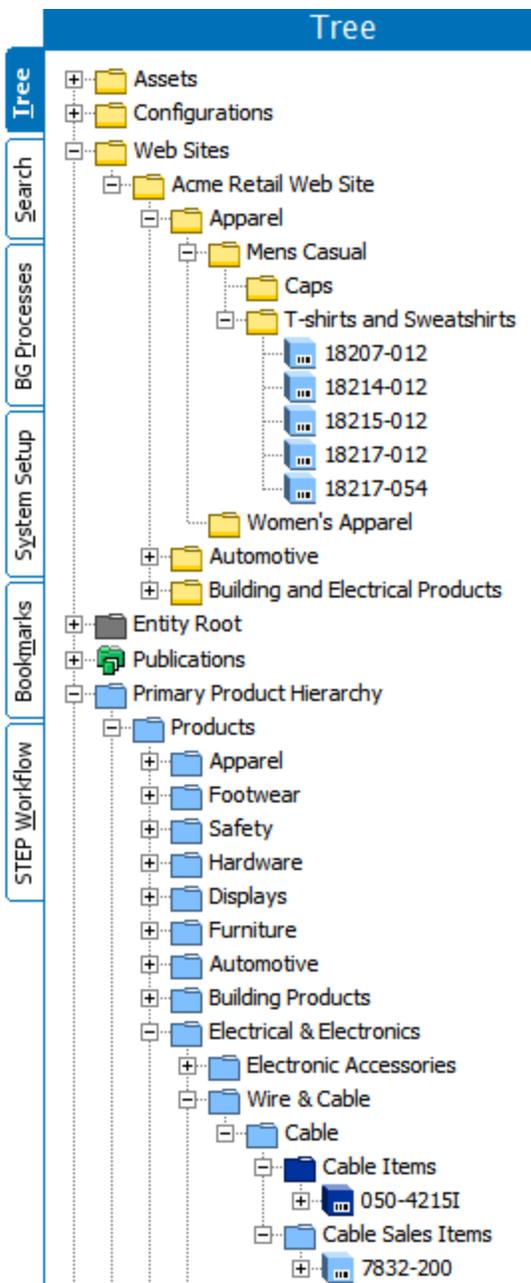
More information on the characteristics of the various super types can be found in the **Object Super Types** topic within this guide.

Object Types Versus Object Instances

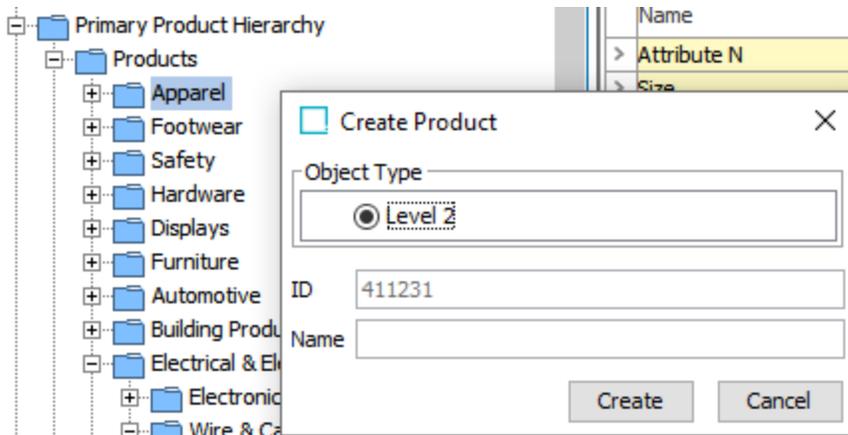
Two core capabilities for managing data in STEP are the Tree tab and the System Setup tab. In order to successfully use STEP, it is critical to understand the differences between the functions available in these two areas, specifically in relation to *types* of objects versus *instances* of objects.

Technically, everything in STEP is an object, including workflows, attributes, business rules, export and import configurations, products, classifications, images, etc. However, the term "objects" is more generally used to mean assets, classifications, entities, products, and publications. In other words, the super types are also all things that you can find on the Tree tab in STEP. This section focuses on the differences between object types and object instances for Tree objects, specifically those that fall into the super types.

For example:

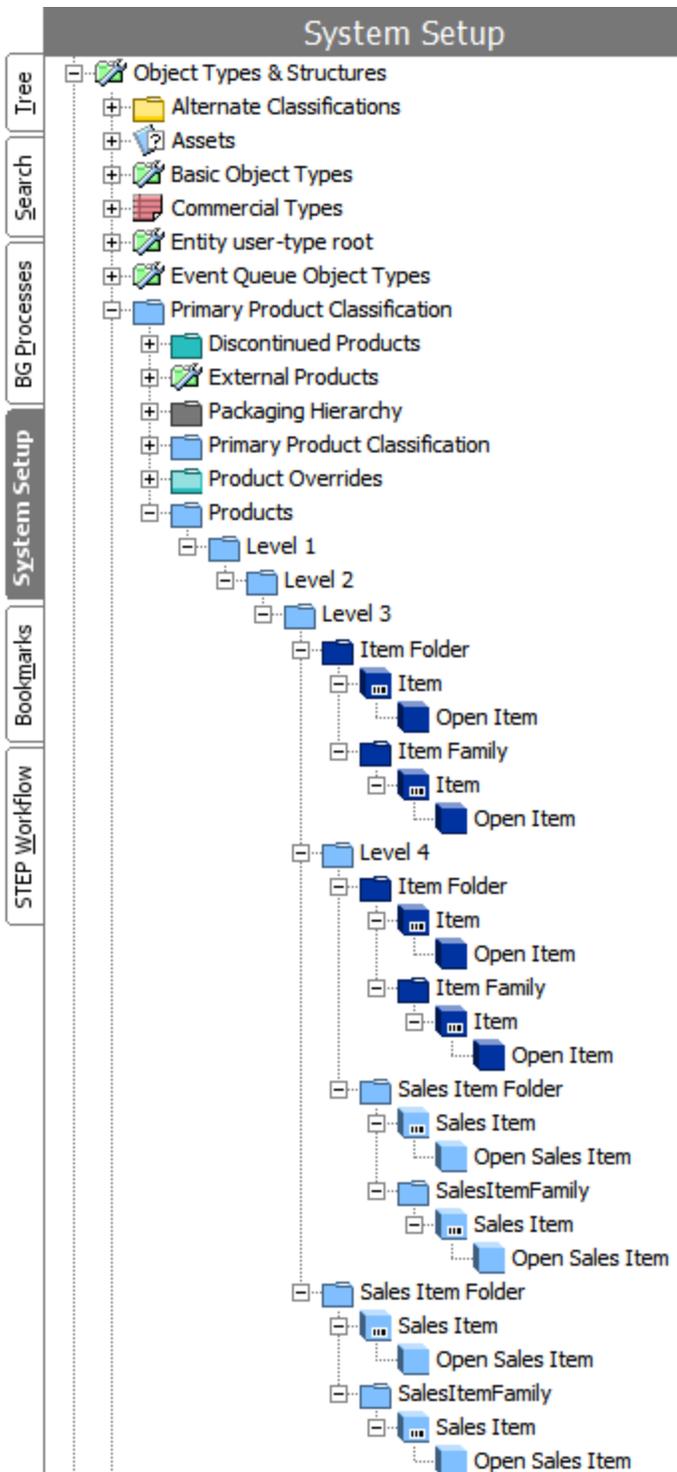


The objects and structures available in the Tree will vary based on your particular data model, but the concepts described can be applied across any data model. Regardless of the specific names or structures, each node on the Tree tab is an individual object that has a defined "place to live" within a hierarchy. A user can right-click on many of these objects and have a 'New...' option, such as 'New Product' or 'New Classification', allowing them to create a new node in the hierarchy. For example, when right-clicking on the 'Apparel' object and selecting 'New Product', a dialog appears with an option to create a 'Level 2' object.



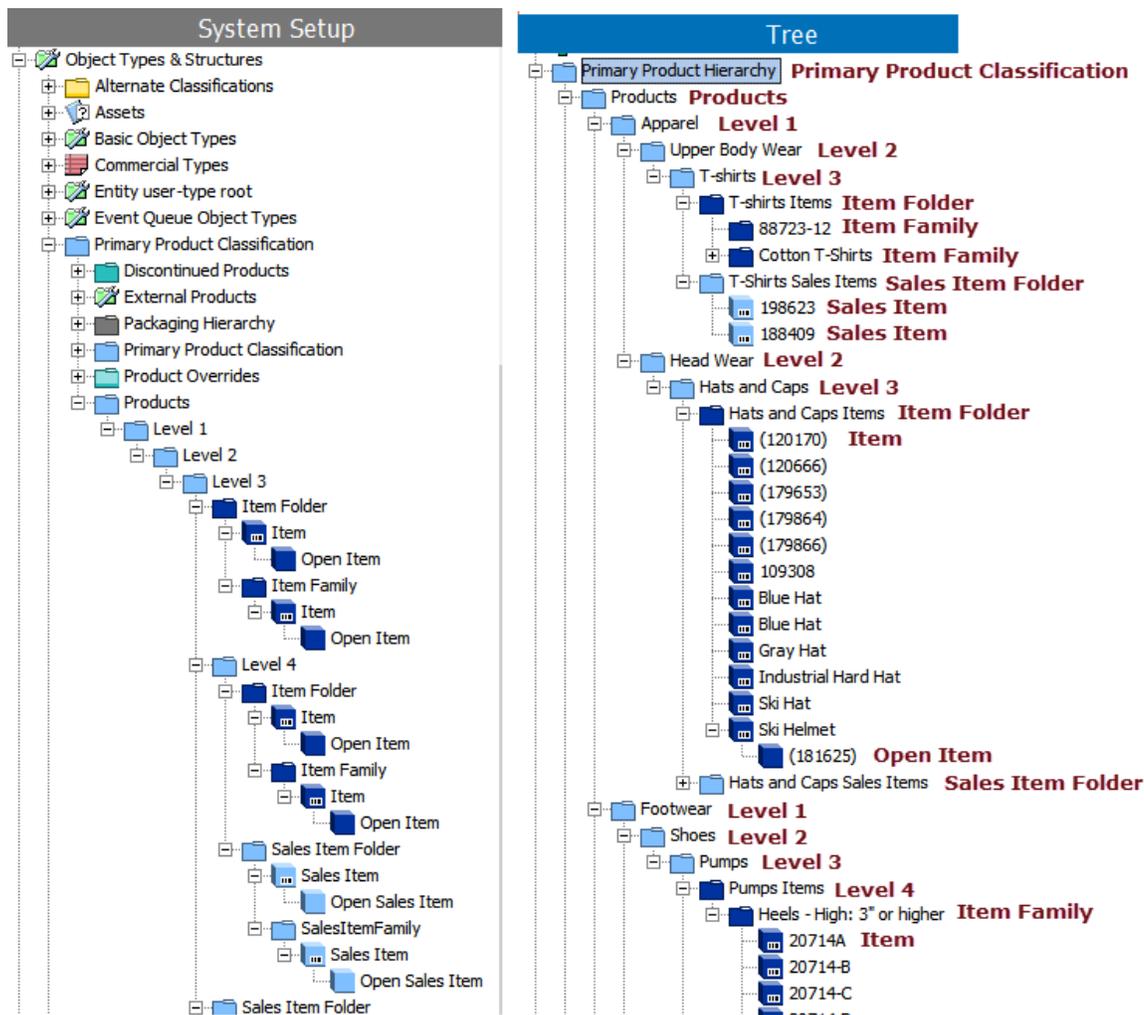
Typing a Name and clicking Create would create a new object as a child to the Apparel node. But what defines that a 'Level 2' object can be created on this node? And that it is a Product (blue) object rather than an Entity (gray) or Classification (yellow)?

The allowable structure of objects and hierarchies that are accessed in the Tree are defined in System Setup. To continue with the above example, we can see that the defined object types and structures include a Primary Product Classification that has a number of levels. A Level 1 can only have a Level 2 child, which in turn can only have a Level 3 child. However, a Level 3 object type can have a number of child object types, including an Item Folder, Level 4, and a Sales Item Folder. A Sales Item Folder is a child of a Level 3 object type, as mentioned, but can also be a child to a Level 4. Similarly, a Sales Item can be child to multiple things, including a Sales Item Folder and a Sales Item Family.



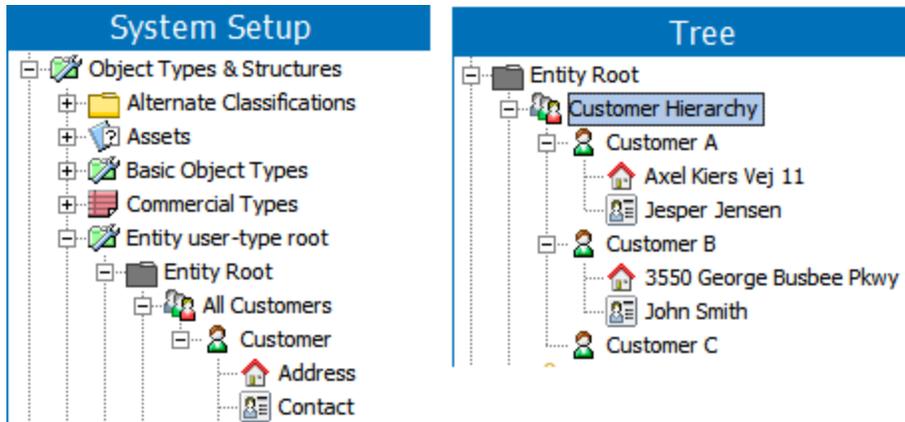
The object types defined in System Setup provide the "skeleton" for the allowable instances of objects that can be created in the Tree. It is important to understand that it is only the *structure* and *types* of objects that are defined in

System Setup, but any number of *instances* of the defined types can be created in Tree. This is best illustrated by viewing System Setup and Tree side by side, as shown below. Object instances are displayed in Tree, with red text indicating the corresponding object type designations from System Setup.

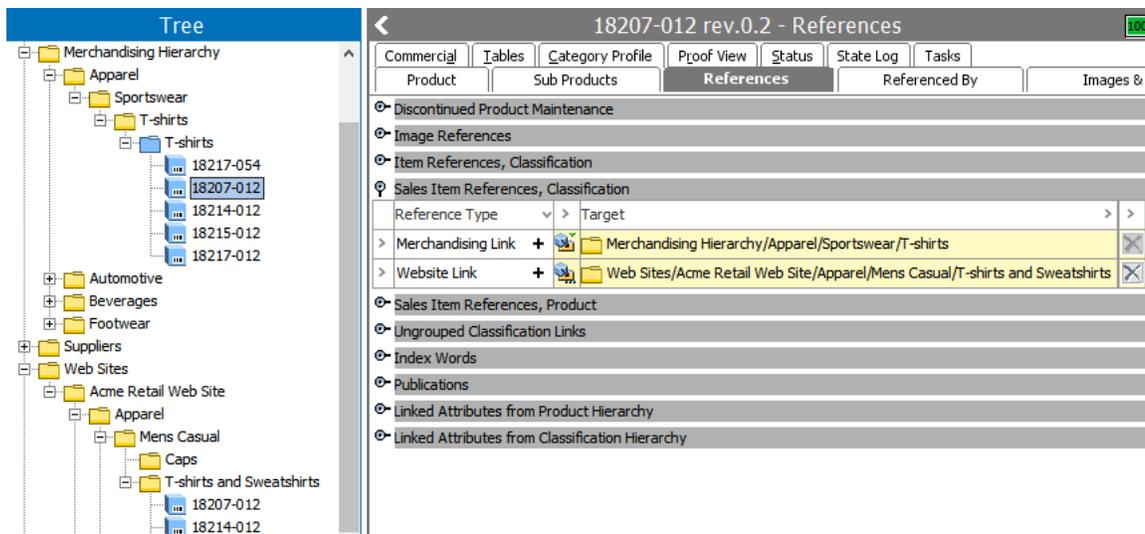


Notice in the above screenshots that a Level 2 object exists in System Setup only once, but we see multiple instances of it in Tree.

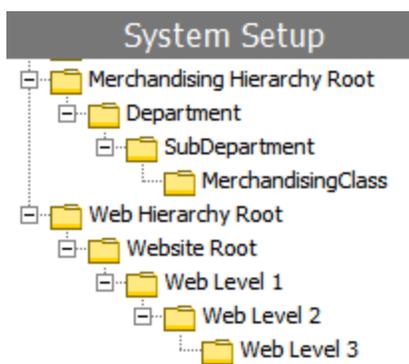
The same principles described for the Primary Product Hierarchy apply to all other hierarchies in STEP. For example, an entity hierarchy could have a Customer object type with allowable children of Address and Contact object types. The object types and structures are defined in System Setup, and instances of these objects can then be created in Tree.



Note that object super types can only exist within their designated hierarchy types. To clarify, a product hierarchy (blue hierarchy) can only contain object types of the product super type, while an entity hierarchy (gray hierarchy) can only contain objects of the entity super type. It is possible to have the visual appearance of mixed hierarchies, but this is accomplished via references rather than actual data structures. For example, products may appear in the Tree to be within a classification hierarchy, but this is due to references on the object, as shown below.



Notice that the corresponding System Setup structure for the above does not include the product object types.



The true residence of the product objects is within the Primary Product Classification, with a visual display of the product references into various classification hierarchies being just that: a visual display of references. However, assets are an exception to this concept. Assets are not part of the Classification structure in System Setup, but do in fact exist within this structure in Tree. Each asset must be linked in to one or more classifications, and this is the only location in which they "live" in STEP. Each asset automatically has a reference applied to each classification in which it is linked. More information on references can be found in the **Reference and Link Types** topic in the **System Setup / Super User** guide. More information on the various object super types and their characteristics can be found in the **Object Super Types** topic within this guide.

Using the above information, the questions posed earlier in this topic can now be answered:

Why can we only create a Level 2 object under the Apparel node? Because in this particular data model configuration the Apparel node is a Level 1 object type, and only Level 2 object types are allowed to be created under a Level 1 object type.

Why can't we create an Entity or Classification under the Apparel node? Because only object types within the same super type can exist within the same hierarchy. And even if this wasn't the case, the structure defined in System Setup in this particular hierarchy only allows a Level 2 object type (of the product super type) under a Level 1 object type.

Note: All text data is saved in the system in Unicode UTF-8. All standard data exports from the system are also in UTF-8. Some system extensions may use a different character set on export, but the standard is UTF-8.

UTF-8 can define more than one million characters. To do so, it uses up to 4 bytes of storage. Regardless of whether it uses one, two, three, or four bytes, it is still one character and as such any character counts that are imposed on text attribute's length is specified and counted in characters and not bytes.

As a standard, the Microsoft Arial Unicode font is used for display. Its character set supports most languages of the Americas, and Western and Eastern Europe (including Cyrillic and Greek). In some cases, as in the case with some Asian languages, additional fonts must be loaded onto the PC or MACs. But for most cases, the character set provided by Arial Unicode MS is sufficient.

For more information on Unicode UTF-8 the reader is advised to refer to the various web sites that describe its functionality, such as the Wikipedia site: <https://en.wikipedia.org/wiki/UTF-8>.

Object Super Types

This topic provides an introduction to the STEP object super types. It will be helpful to have read and understood the **Basic STEP Concepts** topic in this guide prior to reading this material.

Object types that make up the standard STEP hierarchies accessible on the Tree tab in workbench are referred to as Tree Object Types. Many of these object types can be further grouped into five categories of object types, referred to as the super types. This topic introduces the five primary object super types in STEP. Understanding the differences between the various object super types is important when making decisions about how to model data in STEP.

Each super type has specific characteristics that make it suitable for modeling particular types of data. For example, inheritance of data is available within the Product super type so objects that share data based on common characteristics are typically modeled using this super type. Alternatively, digital media files are housed using the Asset super type, which allows for automatic reading and storing of asset properties such as size and format. Any number of individual object types within each super type can be created. For example, a system may use both an 'Icon' object type and an 'Illustration' object type (along with any number of others) within the Asset super type.

The object super types are:

1. Assets
2. Classifications
3. Entities
4. Products
5. Publications

Each is described below, along with links to more detailed information for working with the various super types.

Assets

The Asset super type is used to hold any type of digital media, including images, videos, documents, and text files. Assets are organized within classifications, and can be linked to other objects in STEP using references. Specifically, assets can be linked to objects of the Classification, Entity, or Product object super types. Upon import, STEP populates some basic information about each asset, which can be viewed under the System Properties flipper on each asset, but cannot be edited. Default asset icons vary by file type, and can be updated by admin users.

Tree

- Assets
 - Icons
 - NEW!**
 - ProductFolderIcon
 - Truck
 - Illustrations
 - Installation Manuals
 - Logos
 - MSDS Sheets
 - Owners Manual
 - Product Images
 - Product Videos
- Configurations
- ETIM Hierarchy
- Index Words
- Merchandising Hierarchy
- Suppliers
- Web Sites
- Entity Root
- Publications
- Primary Product Hierarchy
- Collections
- eCatalogs
- Recycle Bin

NEW! rev.1.1 - Images & Documents

Images & Documents | References | Referenced By | Status | State Log | Tasks

Description

Name	Value
ID	111684
Name	NEW!
Object Type	Product Image
Revision	1.1 Last edited by USER4 on Fri Aug 19 14:42:18 EDT 2016
Approved	Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Icons/NEW!

System Properties:

Name	Value
Gamma	0.45
Class	Indexed color
Colors	16
Colorspace	RGB
Compression	Zip
Depth	1 (bits/sample)
Extension	png
Filename	NEW!.png
Format	PNG (Portable Network Graphics image)
Height	231.47 (mm)
MIME Type	image/png
Pixel Height	656 (pixels)
Pixel Width	657 (pixels)
Samples	3 (samples/pixel)

For more information on working with assets, see the **Assets** topic within this guide.

Classifications

The Classification super type is used to build hierarchies and objects that bundle other objects into organized groupings. These are represented by default with yellow folders in STEP, though these icons may be updated by an admin user. For example, images, manuals, and icons could be uploaded to STEP as assets and stored in appropriate subfolders under the 'Assets' classification folder. Product objects could also be linked into classifications to provide alternative categorizations of objects that vary from the product hierarchy structure.

The screenshot displays the 'Assets rev.0.4 - Classification' interface. On the left, a 'Tree' view shows a folder structure with 'Assets' and 'Illustrations' highlighted. The main panel shows classification details for 'AssetsRoot'.

Classification	
Description	
Name	Assets
Object Type	Asset Root
Revision	0.4 Last edited by USER on Fri Dec 04 17:40:33 EST 2015
Approved	✓ Approved on Fri Dec 04 17:40:33 EST 2015
Translation	Not Translated
Path	Classification 1 root/Assets
Visibility	
Purpose	abc

For more information on working with classifications, see the **Classifications** topic in this guide.

Entities

The Entity super type is used to create hierarchies and objects that do not require inheritance of data through categorized groupings. Entities are commonly used to store customer, location, or person data, as well as to store reference data. In addition, entities are used to store source data for golden records. Entities are represented by gray folders and white and gray cubes by default, but these can be updated by an admin user, as is evident in the screenshot below.

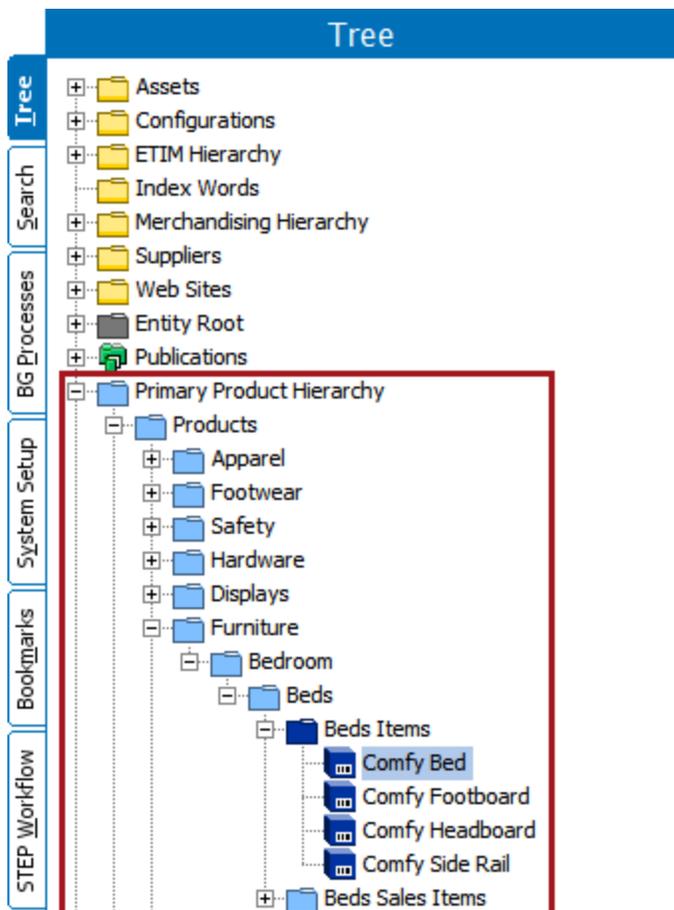
The screenshot shows a 'Tree' view of entities. The 'Entity Root' folder is expanded to show a hierarchy of customer-related entities.

- Entity Root
 - Customer Hierarchy
 - Customer A
 - Axel Kiers Vej 11
 - Jesper Jensen
 - Customer B
 - 3550 George Busbee Pkwy
 - John Smith
 - Customer C
 - Key Accounts

For more information on working with entities, see the **Entities** section of this guide.

Products

The Product super type is used to create hierarchies and objects that use inheritance of data for objects categorized by similar characteristics. In STEP, products are represented by default with blue icons either as folders or nodes, though these icons can be updated by an admin user. Upper nodes in a product hierarchy are often categories and subcategories, with leaf nodes being actual objects. Whether an organizational folder, sellable object, or something else, each node in the hierarchy is of the product super type, and all child objects are able to inherit attributes and values from parental objects.



For more information on working with products, see the **Products** section of this guide.

Publications

The Publication super type is used to create hierarchies and objects used for print publishing solutions, including STEP Publisher, Flatplanner, and AutoPage. Publication objects are used to create templates used in print solutions, as well as publications such as catalogs or pamphlets. Product objects can be linked into publication hierarchies, meaning data from the product(s) will be reflected in the publication. Publication objects use green icons by default, though these can be updated by an admin user.

The screenshot displays the STIBO SYSTEMS software interface. On the left is a 'Tree' view showing a hierarchy of publications. The selected item is 'Shirts' under 'Autopage Publications' > 'Acme Wholesale Clothing'. The right pane shows the 'Shirts - Publication Section' details, including a navigation bar with tabs like 'AutoPage Publication Planner', 'Publication Section', 'Plan', 'Publication Planner', 'Plan Notes', and 'Financial Summary'. Below the tabs is a 'Description' table with various attributes and values.

Name	Value
ID	111845
Name	Shirts
Object Type	Section
Revision	0.2 Last edited by USER4 on Mon Aug 29 11:40:21 EDT 2016
Path	Publications/Autopage Publications/Acme Wholesale Clothing/Shirts
Start section on page	2
Effective Date	<input type="text"/>
Expiration Date	<input type="text"/>
Section Theme	abc Shirts
Circulation	123
Cover Photo Shot Due	<input type="text"/>
FirstPageNumber	fx 5
LastPageNumber	fx 9

For more information on working with publication objects, see the **Publication Hierarchy** section of the **STEP Publisher (InDesign)** documentation.

Accessing STEP System Information

The simplest way to access system information about your STEP installation is by clicking the **About STEP** link on the Start Page.

STEP system information is useful for system troubleshooting and new project planning, as well as helping users ensure compliance with their contracted license terms.

Though system information is also obtainable through the Admin Portal `install.log` or by running a Stibo Patch Operations Tool (SPOT) command on the application server, clicking About STEP is the most straightforward way to obtain this information. For more information on the `install.log`, see the **Logs** topic in the **Administration Portal** documentation. For information on the SPOT command, system administrators may contact Stibo Systems.

'About STEP' Page

When the About STEP icon is clicked, a new page is opened (e.g., `http://[yoursystem]/about/step`) that is password protected to ensure that only STEP users have access to the information.

This 'about' page displays the following information:

- System name
- STEP version, in a string that identifies the system by its baseline version that includes the major release version number (e.g., **8**); minor release number (e.g., **.2**); the maintenance patch version, if applicable (e.g., **mp1**); and the baseline creation date.
- Number of user accounts and the number of allowed user accounts. Standard STEP users that do not count against the number of licensed users—such as DBA, STEPSYS, SERVICE, and SWADMIN—are not included in the user count.
- The approximate number of products, classifications, assets, and entities. Object counts are approximate because changes could be going on in the background while the page is being viewed. Also, for time purposes, the quick approximation number is preferable to an exact count, which could potentially tie up system resources for a prolonged time.
- The number of contexts, dimensions, and languages

- System name: **doc-rel**
- STEP version: **10.2-mp2-2021-08-18-13-51-12**
- [Detailed version information](#)
- Number of user accounts (including suppliers): **64**
- Number of supplier accounts: **7**
- Allowed number of user accounts: **100**
- Number of products (approx.): **900**
- Number of classifications (approx.): **8000**
- Number of assets (approx.): **500**
- Number of entities (approx.): **7000**
- Number of contexts: **12**
- Number of dimensions: **2**
- Is InMemory Enabled: **false**
- Number of languages: **10**

The full version information of this system is available via [snapshot.spr](#) file, please submit this file along with any support requests.
 If you are having any problems with the STEP system, please produce a diagnostics package instead. This can be done via the [Administration page](#).

Detailed Version Information

A 'Detailed Version Information' hyperlink is also included that opens a new page (e.g., [http://\[yoursystem\]/about/version](http://[yoursystem]/about/version)) where you can access information about the add-on components, customizations, and hotfixes applied to your system. If your system contains none of these, only the current baseline version of the system is displayed.

- Baseline version: **step-10.2-mp2-2021-08-18-13-51-12**
- Add-on components:
 - wikimetadata-7.0.7**
 - value-generator-7.0.4**
 - user-anonymizer-7.0.7**
 - ui-search-7.0.11**
 - ui-product-editor-7.0.19**
 - ui-basket-7.0.14**
 - syndigo-7.0.5**
 - local-loqate-7.0.14**

System Snapshot and Diagnostics Package Links

Below the bullet list, additional information is provided to assist users who need to access more complete system information for support purposes.

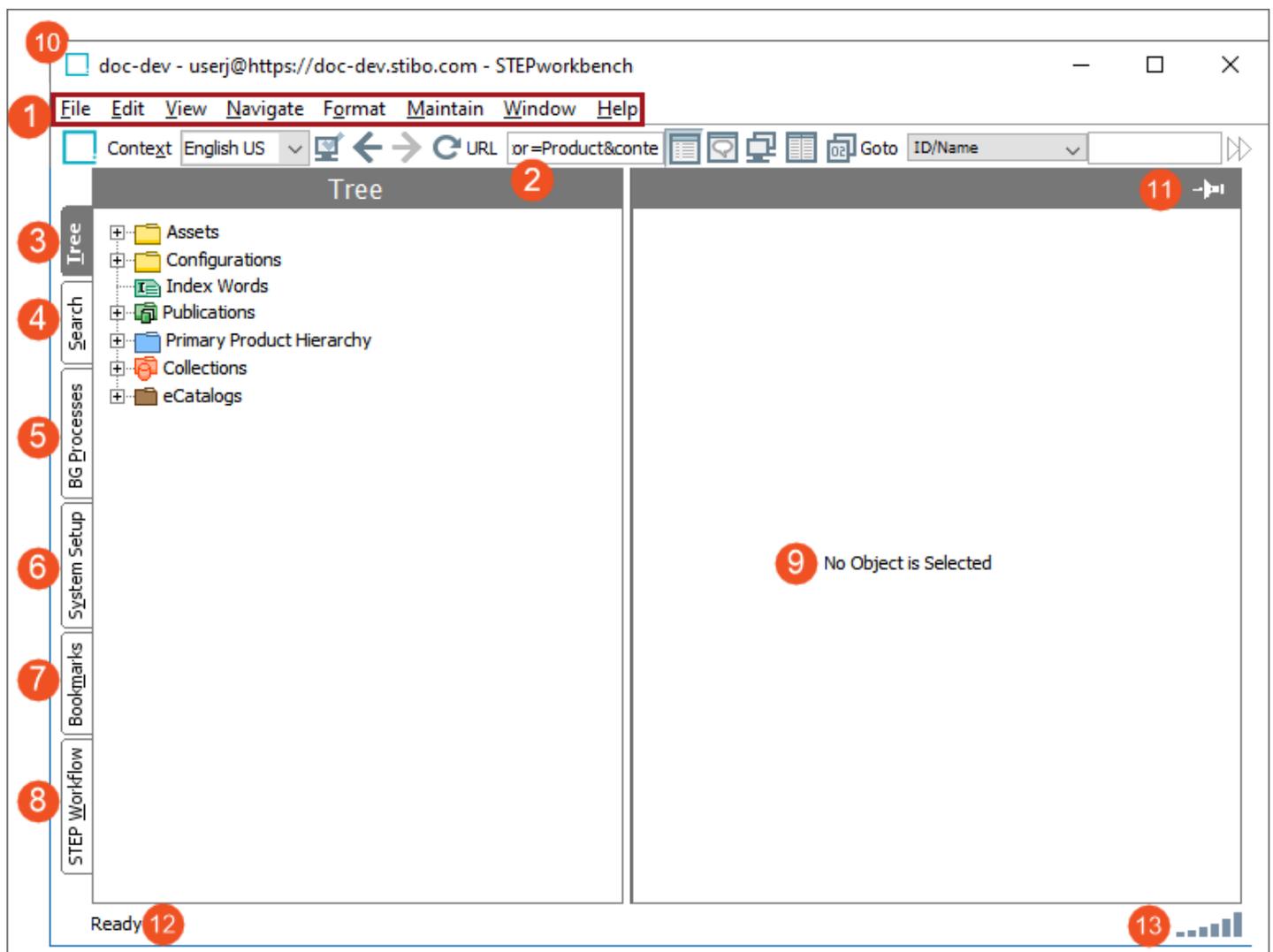
Provided is a snapshot.spr link where you can download a snapshot file that contains full system information, including installed bundles, metrics, and differences to previous snapshots. This file is intended to be submitted to Stibo Systems along with support requests. For more information on snapshots and their contents, see the **Tools** topic in the **Administration Portal** documentation.

Also included is a link to the Administration Portal page, in case you need to produce a diagnostics package. This package is generated and uploaded to Stibo Systems from the 'Send Diagnostics' tab. For more information, see the **Send Diagnostics** topic in the **Administration Portal** documentation

STEP Workbench UI

The screenshot below shows a basic view of the STEP Workbench. Though system customizations and variable access permissions may result in a slightly different view, the basic elements in this view of the workbench's Main Window will be present for most users. The key elements of workbench UI are numbered and defined below.

Important: A one-time install of the STEP Workbench Launcher needs to be done on each client workstation before opening workbench. STEP Workbench users do not need Java installed separately on their computers. After installation, the workbench will launch via conventional means. For details and directions, click on the Workbench Launchers icon, accessible on the Start Page.



Note: The STEP Workbench is a Java client. STEP's backend is AdoptOpenJDK.

1. The Menu Bar contains a collection of various tools for users to perform actions in the workbench. For more information, see the **Menu Items** topic in this documentation.
2. The Toolbar contains actions that help with the view and navigation of the workbench. For more information, see the **Toolbar** topic in this documentation.
3. The Tree tab navigates users to the object tree in the workbench. For more information, see the **Tree Tab** topic in this documentation.
4. The Search tab provides access to the advanced search functionality of the workbench where users can filter results, save these results as a collection, export these results for external use, or perform bulk updates on these results. For more information, see the **Search Tab** topic in this documentation.
5. The BG Processes tab contains all of the background processes occurring in the STEP instance. For more information, see the **BG Processes Tab** topic in this documentation.
6. The System Setup tab contains all of the administrative actions to set up the workbench to maintain data. For more information, see the **System Setup Tab** topic in this documentation.
7. The Bookmarks tab contains all of the bookmarks that are saved by the user. For more information, see the **Bookmarks Tab** topic in this documentation.
8. The STEP Workflow tab contains all of the workflows currently associated with STEP. The toggles can be flipped to show the states associated with each workflow. For more information, see the **STEP Workflow** topic of this documentation.
9. Selecting an object in the workbench populates the Object Editor pane with fields and actions based on associated permissions and validity for the selected object. For more information, including the hide () and show () buttons, see the **Object Editor** topic in this documentation.
10. **System Information.** At the very top of the STEP window, important information about the user's STEP system is listed. The first element displayed is the name of the STEP system, then the user ID, followed by the URL of the STEP system being accessed.
11. **Thumbtack** - The default is unpinned () , but allows users to pin () the right-hand side of the window. Once pinned, a user may navigate to other items in the Tree while the information in the right side of the screen remain unchanged. One such use case can be seen with adding objects to the Flatplanner basket. To see this example, see the **Adding Objects Manually to the Basket** topic in the **Flatplanner** documentation.
12. **STEP connection status** displays the status of STEP's connection to the internet. When the connection is strong and STEP is ready to run normally, the status will read 'Ready.' Other statuses that may appear are:
 - **Reading.** STEP is requesting information from the database.
 - **Lost Connection to.** STEP has lost connection to the server.
 - **Reconnected to.** STEP has reconnected to the server after a lost connection. May alternate with the **Lost Connection to** status if the connection to the internet is lost for a significant period of time.
13. **Connection strength** is a small graph illustrating the connection strength between the user and the server, also know as the 'Network Latency.' If a user hovers their cursor over the graph, a hover-over display will appear showing how fast data is traveling between the server and the user as measured in milliseconds.

BG Processes Tab

The BG Processes tab shows all active and inactive background processes (BGPs). Activity such as an import, export, bulk-update, collection creation, etc., generates a background process and a log and informs users if the process was successful. In the event of an unsuccessful background process, an error message is displayed showing the reason for failure.

Background processes are based on the type of activity, for example 'Approve recursively,' 'Bulk update,' 'Create Collection,' 'Download Report,' as well as 'Translation,' 'Translation Import,' and 'Unique Key Processes' shown in the image below.

Property	Value
Started by	USER1
Id	BGP_180963
Description	100703, en-US > German, Tue Jul 05 13:53:00 +0530 2016
Execution Server	doc-dev
Progress	30%
Status	failed
Created	Tue Jul 05 04:23:01 EDT 2016
Started	Tue Jul 05 04:23:15 EDT 2016
Finished	Tue Jul 05 04:23:17 EDT 2016
Processing Time	0 m 2 s
Time in Queue	0 m 14 s
# of warnings	0
# of errors	2

Execution Report

- Analyse
- Logged on
- Analyzing translation request
- Analysis selected 1 out of 1 nodes for translation
- Leaving query service
- Root node was specified. Will wait for user to accept analysis result
- Parsed translation configuration
- Logged on
- Updating translation status
- 1 nodes will be exported for translation
- Registering pending translation file '100703-100703.xlsx'
- Xml for translation: [exceltranslation BGP_180963.zip](#)
- Translation Export Completed
- Export failed with exception: Optimistic locking errors were detected vta s
- Caught OptimisticVerificationException at Tue Jul 05 04:23:17 EDT 2016

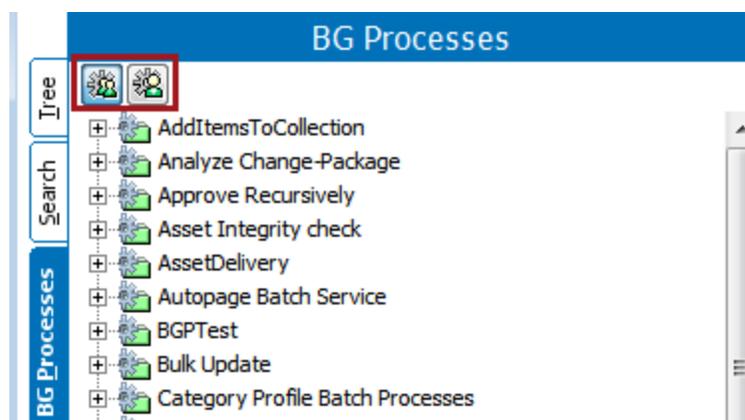
A background process can be in the following states: queued, active, completed with errors, or ended. For details on these states, see the **BG Processes States** topic in the **System Setup / Super User Guide** documentation.

For information on Background Process Queues, see the **Background Processes and Queues** topic in the **System Setup / Super User Guide** documentation.

For information on initiating and monitoring BGPs in Web UI, see the **Background Process List Screen** topic in the **Web User Interfaces / Web UI Getting Started** documentation.

BG Processes Displayed

In the BG Process tab, a user can choose to see only the BGPs that they have initiated, or with the appropriate privileges, they can see all the BGPs run by any user. The display is selected by clicking either the 'Two People and Gear' button or the 'One Person and Gear' button highlighted in the image below.



Two People and Gear () displays all background processes run by any user. This button is enabled by the 'View Background Processes of Other Users' setup action as defined in the **Setup Actions** topic of the **System Setup / Super User Guide** documentation.

One Person and Gear () displays only the background processes run by the user who is logged in.

Background Process Tab

The Background Process tab in the editor contains:

- The **Properties** flipper includes who started the background process, an auto-generated unique identifier, the type of BGP performed (export, import, bulk update, etc.), status (Succeeded, Failed), creation date and time, start date and time, end date and time, time taken to process the request, number of warnings, and number of error messages.

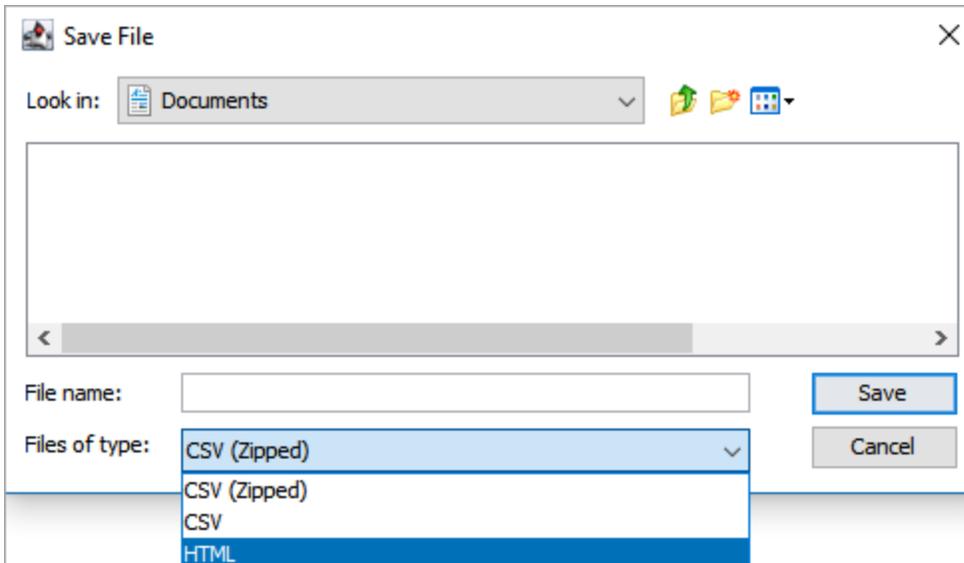
Background Process		Queue Info
🔍 Properties		
Property	>	Value >
Started by		USER 1
Id		BGP_180963
Description		100703, en-US > German, Tue Jul 05 13:53:00 +0530 2016

- The **Execution Report** flipper includes detailed information about the process. If the process failed, a message displays the reason.



- The navigation buttons are enabled when until the log reaches over 100 lines.
 - Clicking the  button will navigate back one page.
 - Clicking the  button will navigate to the beginning of the log.
 - Clicking the  button will navigate forward one page.
 - Clicking the  button will navigate to the end of the log.
- The **Save** button allows the user to download the execution report. Click the 'Save' button to display the 'Save File' window. Browse to the download location, add a file name, and click the 'Save' button. The file can be saved as a CSV or HTML file type. For larger files, CSV files can be zipped.

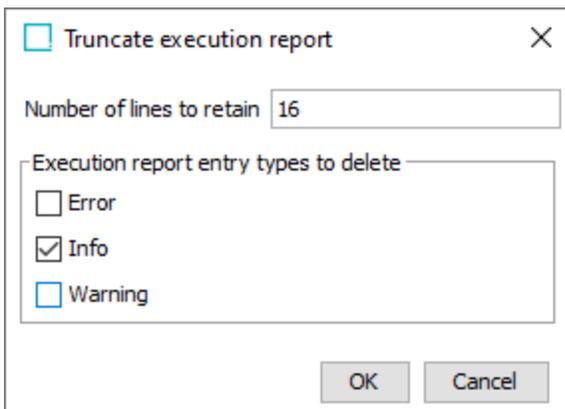
Note: The 'CSV (Zipped)' option is only available when there are more than one million lines (presented as rows) within the execution report. This is a result of MS Excel having a limitation of one million rows per file; the 'CSV (Zipped)' option allows multiple files to be saved.



- **Truncate** - This button is available only on the 'Ended Processes' node.

When the Execution Report becomes cluttered or only specific information is needed (errors or warnings), truncating the report permanently removes the unneeded information. Click the 'Truncate' button to display the 'Truncate execution report' dialog.

Important: Once execution report lines are removed via truncate they cannot be recovered.



For example, assume the execution report has 50 lines and a user wants to see only 16 lines from the report that are errors. With the settings shown in the image above, the user clicks the **OK** button and the execution report retains only the first 16 error lines. All other lines are permanently deleted.

Queue Info Tab

The Queue Info tab in the editor displays the name of the queue being used for the process within the flipper title.

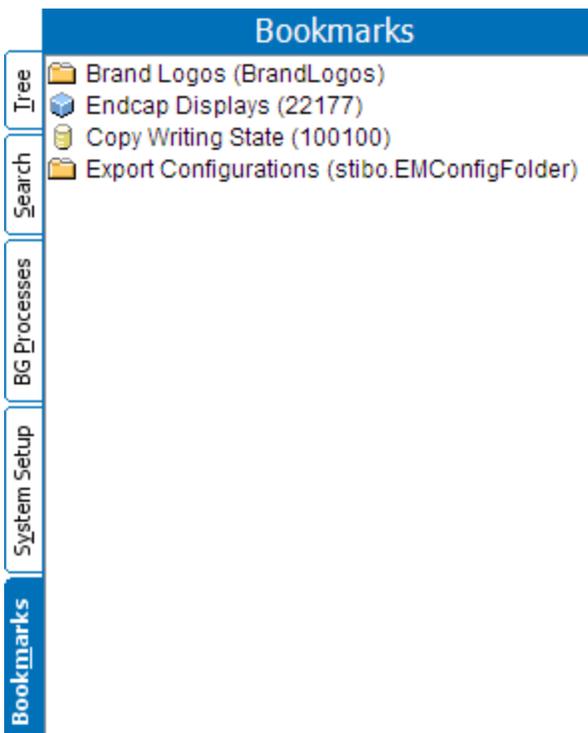
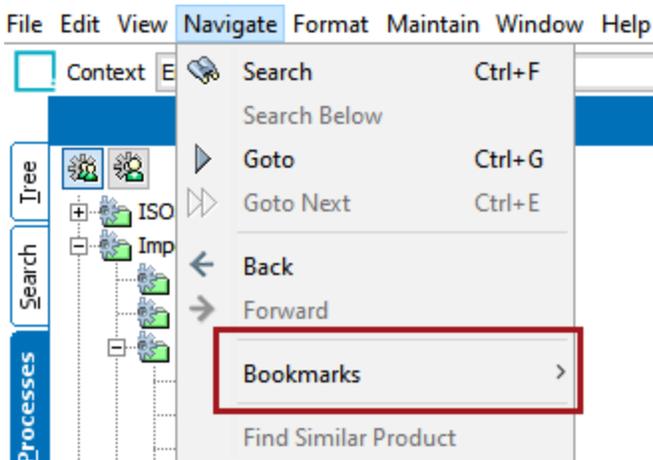
Background Process **Queue Info**

Queue - MISC											
Position >	Process Type >	Process Description >	Process ID >	Started by >	Server >	Progress >	Created >	Started >	Finished >	Processing Time >	Time in Queue >

Bookmarks Tab

The Bookmarks tab allows users to set bookmarks for any objects in the Tree and allows users to easily access these objects without having to search or navigate the Tree.

A bookmark is a Uniform Resource Identifier (URI) that is stored to provide the user with a quick method of retrieving the data at any time. Bookmarks may be accessed either by the menu selection Navigation > **Bookmarks** or by the Bookmark tab.



Note: Bookmarks are stored on the local STEP system and are not accessible when logging into STEP from a different computer.

Bookmarks are specific to individual users – just as in a web browser. This means that one user will not be able to view the bookmarks created by another user.

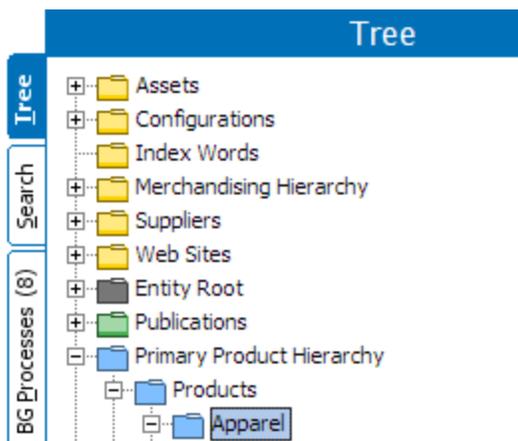
To know more about the Bookmarks and maintaining Bookmarks, see the **Bookmarks** topic in the **Navigation and Searches** documentation.

Adding a Bookmark

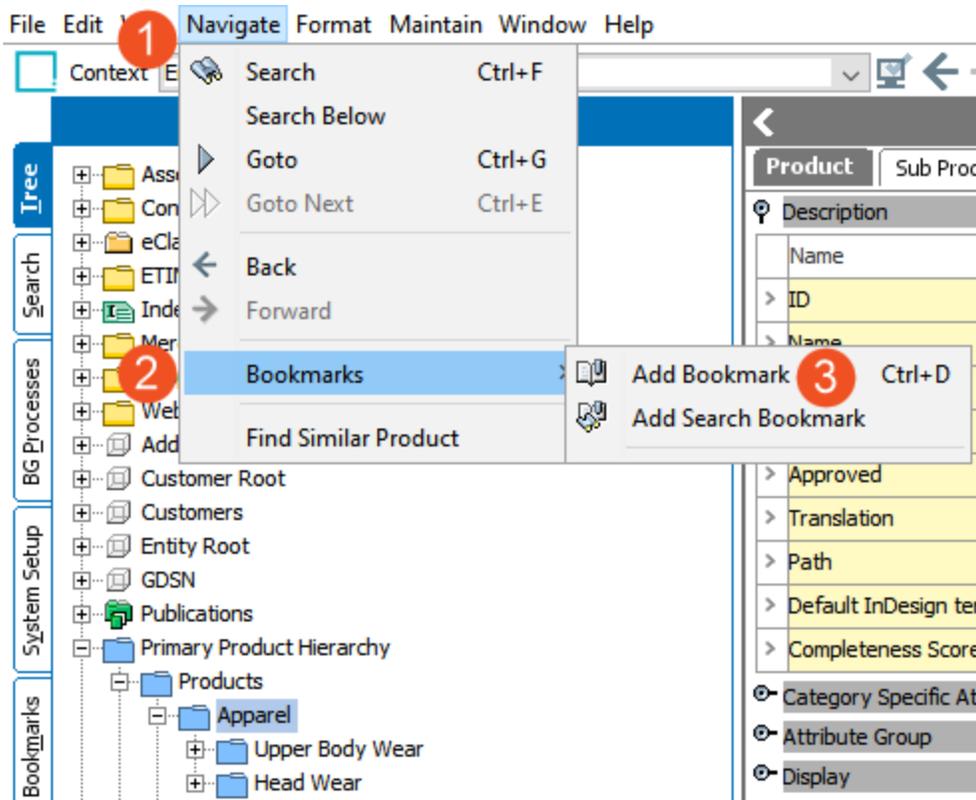
Standard navigation Bookmarks are used to quickly access specific nodes in the Tree and System Setup hierarchies. These bookmarks save the URL of the currently selected object. Any objects from Tree or System Setup hierarchies can be added with the usage of Bookmarks functionality.

To save an object as a Standard Navigation Bookmark:

1. In Tree, select the item to be bookmarked.



2. On the Navigate menu, select Bookmark > Add Bookmark.



Note: Notice that the existing bookmarks are displayed on the menu.

3. The new bookmark is displayed on the Bookmarks tab.



Note: The Standard Navigation Bookmark is saved under the Bookmark Tab. The bookmark is represented with the product icon and automatically labeled with the product name and ID in parenthesis.

4. Click the new bookmark.



5. Navigate to the Bookmarks main tab, and go to the Product tab on an object to view the bookmark data.

The screenshot shows the STIBO SYSTEMS interface. On the left is a sidebar with navigation options: Tree, Search, BG Processes (8), System Setup, Bookmarks, and STEP Workflow. The 'Bookmarks' tab is selected, showing a list of bookmarked items, with 'Apparel (18200)' selected. The main window displays the 'Apparel rev.0.3 - Product' view. The top navigation bar includes 'Commercial', 'Tables', 'Category Profile', 'Status', 'State Log', and 'Tasks'. Below this is a sub-navigation bar with 'Product', 'Sub Products', 'References', 'Referenced By', and 'Images & Documents'. The 'Product' tab is active, showing a table of attributes for the 'Apparel' object.

Name	Value
ID	18200
Name	Apparel
Object Type	Level1
Revision	0.3 Last edited by USER on Thu Jul 30 11:...
Approved	✘ Last Approved on Thu May 21 14:58:...
Translation	Not Translated
Path	Primary Product Hierarchy/Products/Apparel
City	abc
Country	abc
State	abc
Street	abc
Zip	12a

Below the main table, there are sections for 'Sales Item Marketing Descriptions' and 'Attribute Group', each with a table of attributes.

Bookmarks can also be created using a shortcut. Select the object and press **Ctrl+D**. The bookmark is created automatically.

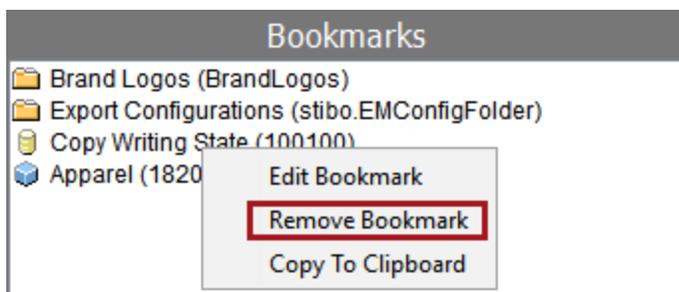
Removing a Bookmark

After saving a Bookmark, it may no longer be needed eventually. There is a right-click menu option that can remove a selected bookmark.

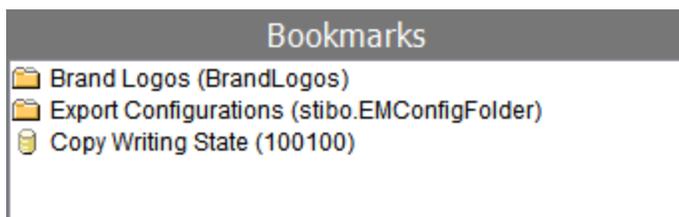
Important: If user deletes a bookmark (Maintain menu > **Delete**), the object is deleted and is moved to the Recycle bin.

No confirmation window displays before removing a bookmark.

1. On the Bookmarks tab, right-click the bookmark to be removed and click Remove Bookmark.



2. The selected bookmark is removed.



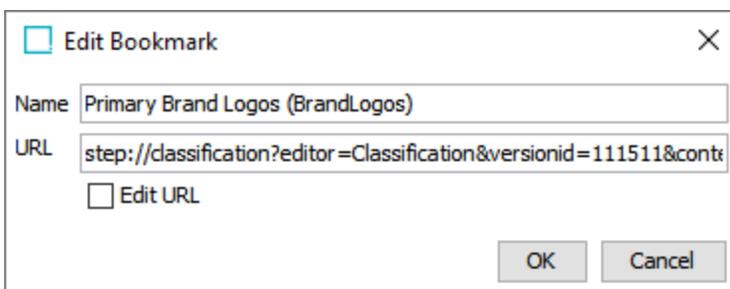
Editing a Bookmark

Both Standard Navigation (the link to specific objects) and Search Bookmarks may be edited in the Bookmarks tab. To edit a bookmark:

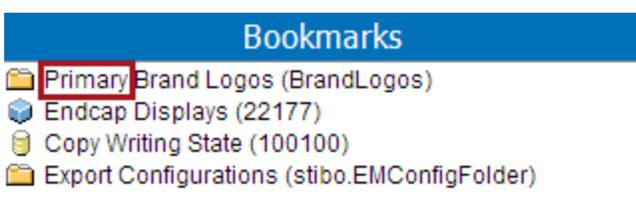
1. On the **Bookmarks** tab, right-click the bookmark to be modified and click 'Edit Bookmark.'



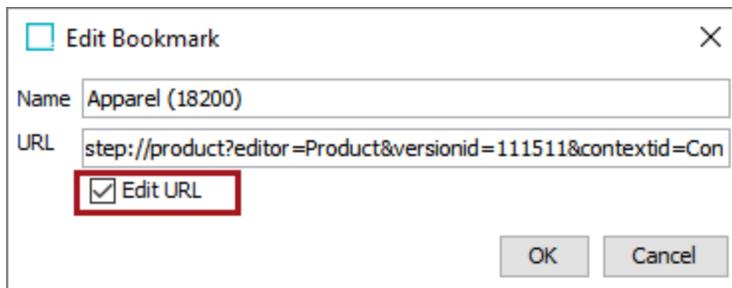
2. If desired, change the name of the Bookmark then click **OK**.



3. The name will be updated in the Bookmarks tab.



4. The object URL can be edited only if the Edit URL checkbox is activated. In the below screenshot, the product URL has been modified which points to a new product URL.



Edit Bookmark ×

Name

URL

Edit URL

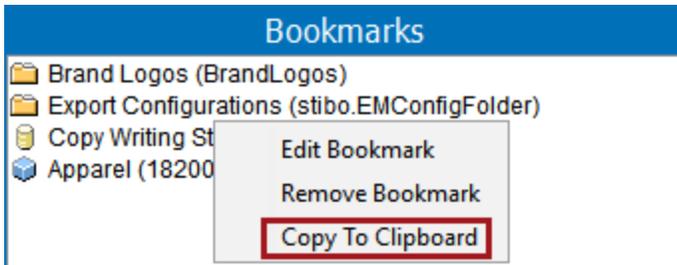
Similarly, 'Search Bookmark' can be edited by editing the 'Search URL,' if the 'Edit URL' checkbox is edited.

5. Click the **OK** button to save any changes to this bookmark.

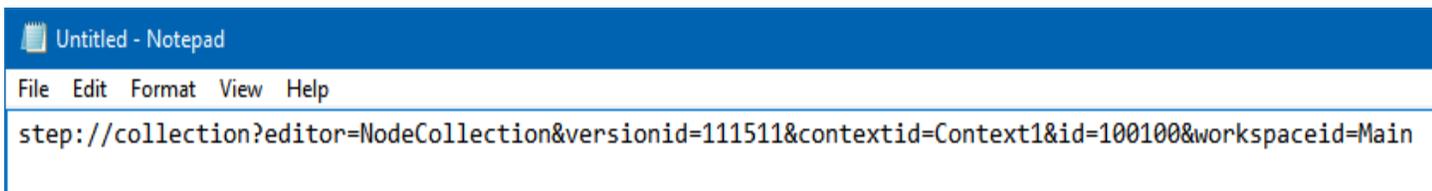
Copying a Bookmark to the Clipboard

Bookmarks are direct addresses to a specific object, such as a product, entity, or publication, in STEP. These bookmarks can be shared to other users by copying the bookmark to the clipboard, and then pasting this bookmark to a shareable medium.

1. On the Bookmarks tab, right-click the bookmark to be removed and click 'Copy to Clipboard.'



2. Paste the copied URL of the bookmark (using Ctrl + V on Windows).



The copied URL can be pasted in the URL Field of STEP Workbench, and the user can search the respective objects.

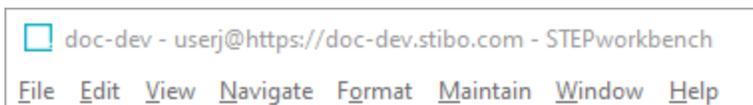


Note: You may send the copied URL to other STEP users so that they can navigate to the object or to the search criteria.

Menu Items

The STEP Workbench menu bar provides access to many aspects of STEP's functionality. Some of the options in these menus are also available via a right-click menu accessible elsewhere in STEP. For instance, users may add a product to a product family by selecting the product family, and then selecting Maintain > Insert > Product in the menu bar, but they may also perform the same action by right-clicking on the product family in the Tree. However, some options, like changing the view target, are only available in the menu bar dropdown menus. Each of the menu bar sections are detailed on subsequent topics.

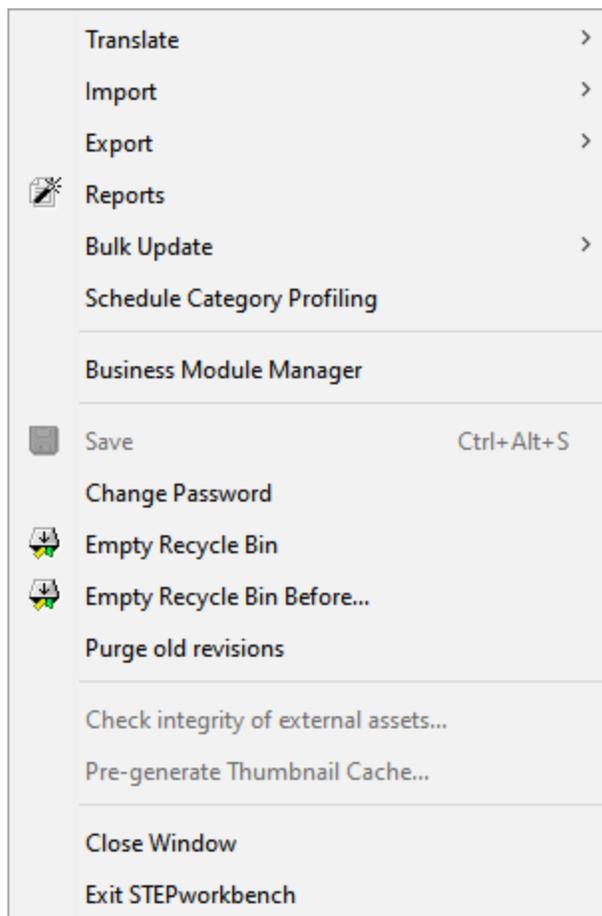
Note: Many menu options can be used with a keyboard shortcut. For a list of the keyboard shortcuts, see the **STEP Workbench Keyboard Shortcuts** topic in the **Getting Started** documentation.



- **File** — The File menu provides access to import and export actions as well as general STEP Workbench tasks, such as running bulk updates, changing passwords, and emptying the Recycle Bin. For more information, see the **File Menu** topic.
- **Edit** — In addition to administration actions like copying and pasting, the Edit menu also provides access to tasks like spelling checks, managing assets, and editing unique keys. For more information, see the **Edit Menu** topic.
- **View** — The View menu contains options that change how data is displayed in the workbench. For more information, see the **View Menu** topic.
- **Navigate** — The Navigate menu contains searching options and the ability to find similar objects. For more information, see the **Navigate Menu** topic.
- **Format** — The Format menu allows for setting styles such as bold or italics and inserting character tags. For more information, see the **Format Menu** topic.
- **Maintain** — The actions available on the Maintain menu pertain to data maintenance at the object level. Data such as LOVs and attribute values can be merged. Data can also be forcefully deleted, duplicated, or approved. Links and new objects can be created in this menu. For more information, see the **Maintain Menu** topic.
- **Window** — The Window menu provides actions for changing the presentation of the STEP Workbench. For more information, see the **Window Menu** topic.
- **Help** — The primary function of this menu is to link users to the online documentation. For more information, see **Help Menu** topic.

File Menu

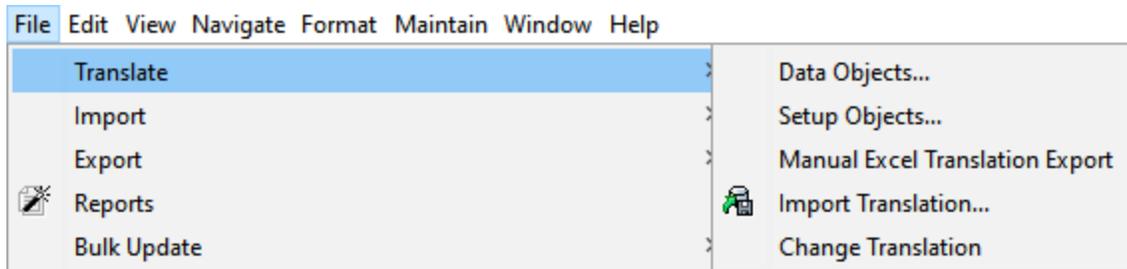
The file menu contains actions that are related to maintaining the workbench from a performance level, such as cleaning the recycle bin, purging old revisions, scheduling bulk updates, as well as defining imports and exports.



Each of the options on the File menu are defined below.

Translate

The Translate menu allows users to translate products, classifications, and names of images and documents, product values, index words, LOVs (List of Values), units, attribute names, free text cells in tables in the workbench, and to import translations.

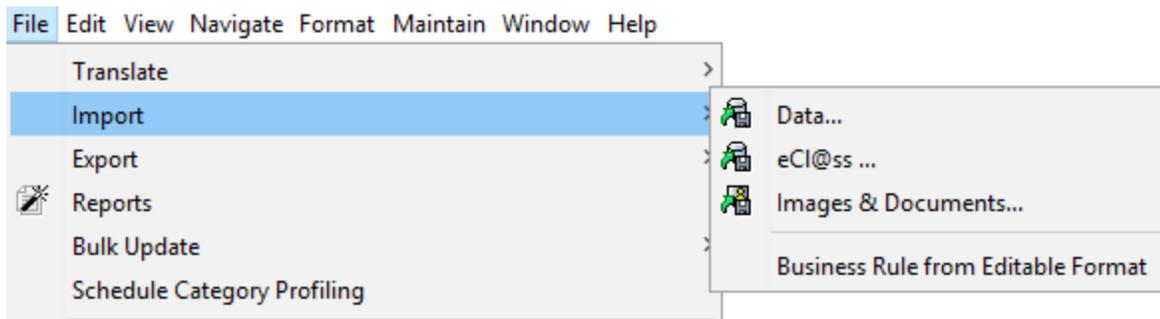


- By selecting 'Data Objects' or 'Setup Objects,' the Request Translation wizard will display. This process results in the creation of a translation file that will include either data objects (objects that contain usable customer data) or setup objects (objects that help organize the data objects). See the **Structured XML Translation** topic for data object translations and **Structured Translation for Setup Objects** in the **Translations** documentation for more information.
- The 'Manual Excel Translation Export' is best used for a specific set of use cases, namely when there is not much content to translate, the translator does not have access to STEP, or the objects to be translated are setup objects. For more information on performing a manual Excel translation, see the **Starting a Manual Excel Translation Export** topic in the **Translations** documentation.
- The 'Import Translation' allows users to select an external translation file.
- The 'Change Translation' allows users to change configurations.

For more information on the translate functionality, see the **Translations** documentation.

Import

The Import menu contains actions for bringing data into STEP.

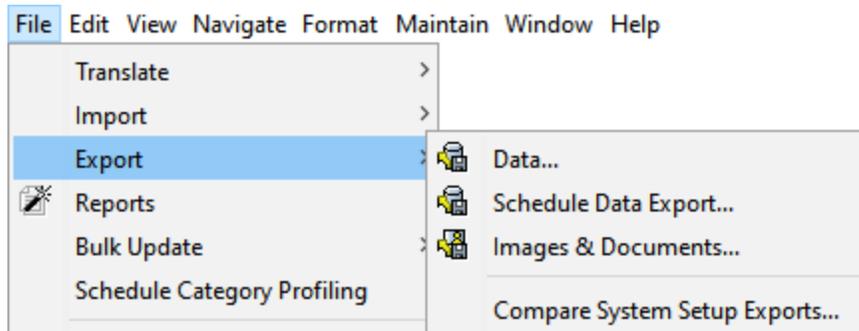


- The 'Data...' option loads the Import Manager. For more information, see the **Import Manager** topic in the **Data Exchange** documentation.
- The 'eCl@ss' option launches the ECLASS Classification import wizard. ECLASS is used to group materials, products, and services. For information on how to best use ECLASS and its importer, see the **ECLASS Format** topic and the **ECLASS Classification Import** topic in the **Data Exchange** documentation.
- The 'Images & Documents...' option, while on a Tree node that contains assets (images and documents), will load the Import Images and Document wizard. For more information, see the **Import Images and Document Wizard** topic in the **Digital Assets** documentation.

- The Business Rule from Editable Format allows users to manually import business rule definitions in the editable format described in the **Version Control System Integration** documentation.

Export

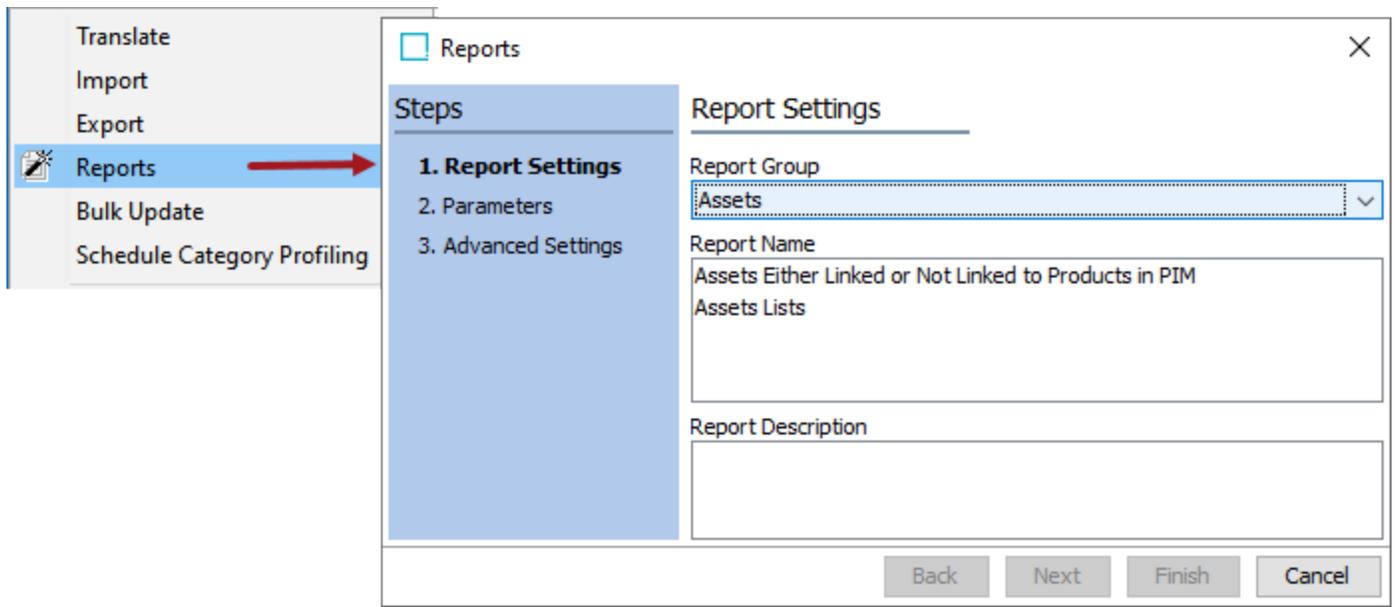
The Export menu contains actions for getting data out of STEP for external management.



- The 'Data...' option loads the Export Manager. For more information, see the **Export Manager** topic of the **Data Exchange** documentation.
- The 'Schedule Data Export...' allows you to create a data export that executes at a specific time or repeatedly. This option starts the **Schedule Data Export** wizard. For more information, see the **Scheduling a Data Export** topic in the **Data Exchange** documentation.
- The 'Images & Documents...' option, while on a Tree node that contains assets (images and documents), loads the Export Images and Document wizard. For more information, see the **Export Images and Documents Wizard** topic in the **Digital Assets** documentation.
- The 'Compare System Setup Exports' option enables you to migrate systems and allows users to determine which items should not be added to the new system. This option will compare two STEP XML files that are exported from two STEP systems, such as a production system being compared with a development system.

Reports

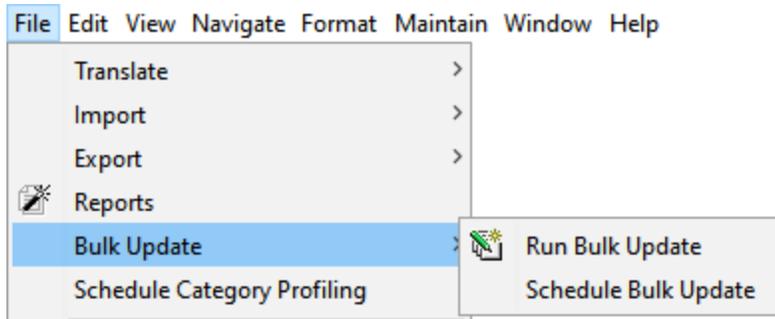
Selecting 'Reports' option will load the Reports wizard.



For more information on the reports wizard, see the **Reporter** documentation.

Bulk Update

Bulk updates allow you to perform one or more actions on multiple objects at the same time.



- The 'Run Bulk Update' option will start the Bulk Update wizard.
- The 'Schedule Bulk Update' option will allow users to create repeatable bulk updates.

For more information, see the **Creating a Bulk Update** topic and the **Scheduling Bulk Updates for Collections** topic in the **Bulk Updates** documentation.

Schedule Category Profiling

Category profiles (also called data profiles) are used to take a snapshot of data that would be displayed in the category profile tab. This snapshot does not update as new changes are made. With this action, the 'Schedule Category Profiling' wizard will display and users may schedule the updates of existing profiles and the ability to copy profiles as well. For more information, see **Generating, Updating, and Scheduling a Data Profile** topic in the **Data Profiling** documentation.

Business Module Manager

A business module is a functional configuration which handles use cases based on common practices observed in the industry. The Business Module Manager allows an administrator to install a pre-configured data model for a business purpose, such as the 'sell side' of the product enrichment process, or the 'buy side' for the vendor data onboarding process. Business module installation can include the creation of product objects types, classification objects, lists of values types, etc. The 'Business Module Manager' option displays on the File menu for all users. The install functionality is available for users who are assigned the 'Install Business Modules' setup action privilege.



Select	Business Module	Installed Version	Latest Available Version	

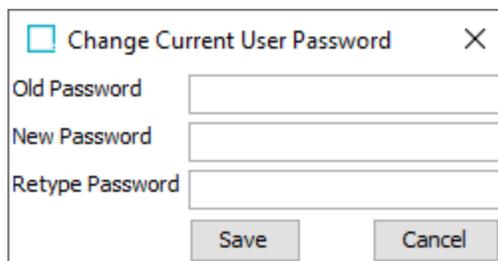
For more information, see the **Business Module Manager** topic in the **System Setup / Super User Guide**.

Save

While saving in STEP Workbench is automatic, the Save option allows users to force a save without leaving a field.

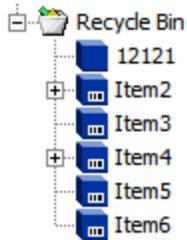
Change Password

During any session, any user may change their own password. Enter your current password in the 'Old Password' field, then enter the new password twice in the 'New Password' and 'Retype Password' parameters. Click 'Save' to complete the update or 'Cancel' to leave the password unchanged.

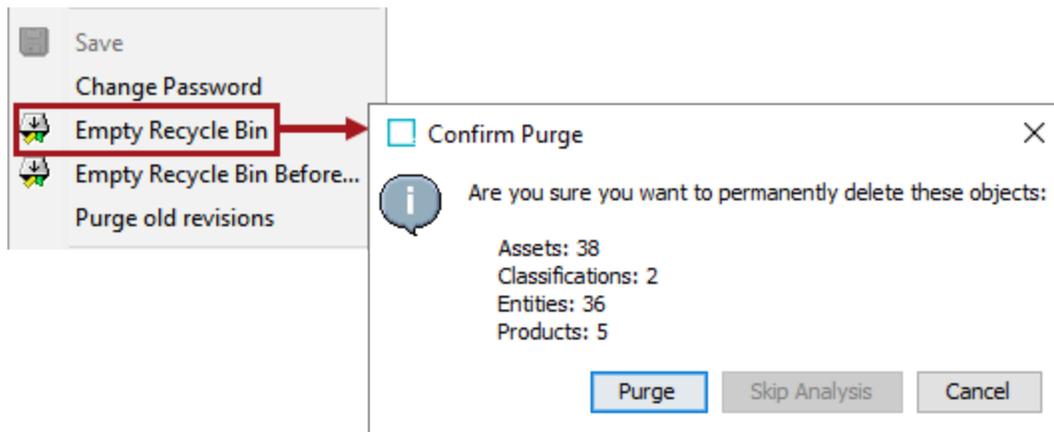


Empty Recycle Bin

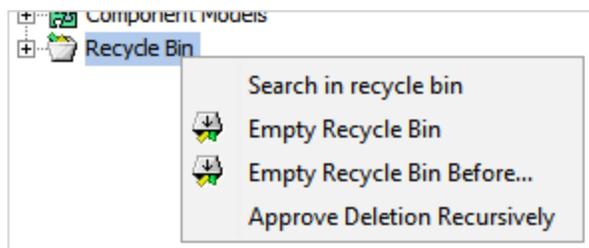
This action purges the 'Not In Use' objects in the Tree Recycle Bin. For more information, see the **In Use and Not In Use Objects** section in the **Approval of Objects** topic of this guide.



Select the 'Empty Recycle Bin' option to display the Confirm Purge dialog. The number of items that will be removed is displayed. Click 'Purge' to permanently delete the items, or 'Cancel' to leave the Recycle Bin unchanged.

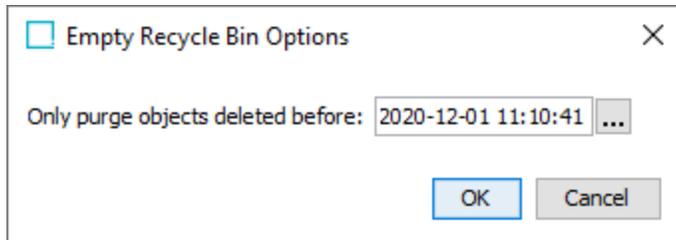


This action is also available via by right-clicking on the recycle bin.

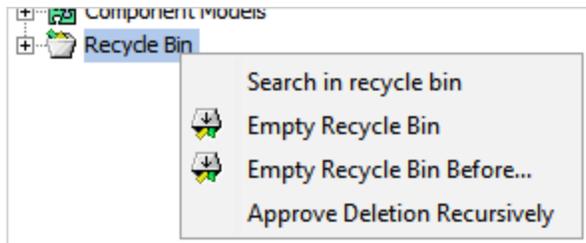


Empty Recycle Bin Before

This action allows users to purge the recycle bin of anything created before a specified date.



This action is also available via right-clicking on the recycle bin.



Purge Old Revisions

This is a global purge of revisions contained within a specified workspace. A further description of this functionality is available in the **Revisions** section of the **System Setup / Super User Guide** documentation.

Check integrity of external assets...

Assets can be stored in a file system on the STEP application server rather than in the STEP database itself. This can reduce the size of the database significantly, and for DTP tools depending on having the referenced high-resolution images directly available on the file system, replication from DB to file system of these images can be avoided.

This option is disabled by default. To enable it, follow the steps defined in the **Initial Setup for an External File Structure** topic of the **Digital Assets** documentation.

The 'Check integrity of external assets...' option is enabled on systems set up to store images in a file system and not in the STEP database. If a Classification is selected, the user can click this menu item to see if all images in the selected classification have been successfully migrated from the database to the file system.

The integrity of the file system for storing digital assets can be double-checked by selecting one or more classifications and then select 'Check integrity of external assets' in the File menu. This starts a background process reporting if any assets are missing or have been changed against expectations.

When errors are found, the assets with wrong or missing content are added to a collection and the URL of this collection is referenced directly from the execution report of the background process.

A check of approximately 10,000 asset files on standard hardware can complete after one minute. Thus, expect that the integrity check might take some time on systems with many assets.

Pre-generate Thumbnail Cache...

This option will generate thumbnail cache of images and documents manually. This action allows any selected image or images in a classification folder to display as thumbnails without having to wait for them to generate.

For example, on the Image and Documents tab of a classification folder, if the image thumbnails are delayed in displaying, then Pre-generate Thumbnail Cache from File menu can be run to generate them in a background process.

For more information, see the **Image Cache Processing Plugin Parameters and Triggers** topic in the **System Setup / Super User Guide** documentation.

This option is disabled by default. To enable it, ask an authorized user (one with the Setup Action = Maintain System) to perform the following steps.

Note: Although this automates the loading process, there will be delays during upload.

1. Under 'System Setup' tab, navigate to 'Users & Groups.'
2. Select 'System Settings' tab.
3. Go to 'Image & Document Settings' flipper.
4. Set 'Pre-generate thumbnail cache on upload' = Yes. On upload of image or document, the thumbnail will be generated automatically.

For more information, see the 'Pre-generate Thumbnail cache on upload' section of the **Images and Documents Settings** topic in the **System Setup / Super User Guide** documentation.

Close Window

This option closes the active workbench window.

Exit STEPworkbench

This will exit the STEP Workbench completely by closing all active windows.

Edit Menu

The Edit menu allows for typical text editing actions, asset editing actions, unique key editing, and spell check.

	Undo	Ctrl+Z
	Redo	Ctrl+Shift+Z
<hr/>		
	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V
	Paste and Match Style	Ctrl+Shift+V
	Paste Link	Ctrl+L
<hr/>		
	Select All	Ctrl+A
<hr/>		
	Spelling	>
	Asset	>
	Edit Unique Key Values	
<hr/>		
	Remove Row(s)	Ctrl+Minus
	Insert Row	Ctrl+Plus

Undo

This action reverses the last action of the user.

Note: It does NOT restore character-by-character changes in text editors.

Redo

Once an action is undone by selecting 'Undo', a user can then select 'Redo' to repeat the action.

Cut

Standard 'cut' operation to remove the selected characters.

Copy

Standard 'copy' operation to duplicate the selected characters.

Note: If a folder is copied, the subfolders will NOT be copied.

Paste

Standard 'paste' operation to insert the copied characters at the selected point.

Paste and Match Style

Once something is copied or cut, this will paste with STEP styles associated with the copied / cut text. For more information, see the Style tag section of the **Tags** topic of the **System Setup / Super User Guide** documentation.

Paste Link

Allows the copied object to be linked into another object (e.g., linking an attribute into a second attribute group). Creates a new instance of the same object (not a copy), just in a different location.

For example, if a user has an image for a product line that will live under multiple parents, the Paste Link action can be used. The user selects the asset, and then selects another location that will serve as a parent object. The paste link option can be used to create a link, giving this object two parents. This action will not work on products as products can only have one parent.

Some considerations with this action are:

- an attribute must exist in at least one attribute group,
- if the data must be shown in the Web UI, then an attribute for display purposes should be created

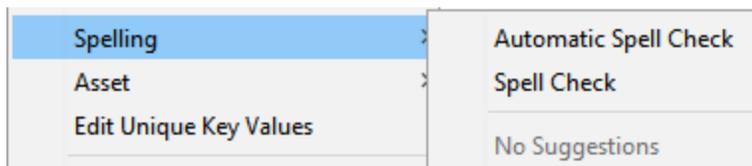
Note: The Paste option is available based on the selected node. For example, when selecting a product node and placing it into a classification folder, only the 'Paste Link' option is available. However, if a product is to be moved to another product family, when selecting the target family after cutting the original product, 'Paste Link' is disabled.

Select All

Standard 'select all' operation to mark all visible objects for another action, like copying or deleting.

Spelling

Allows a user to check the spelling of available text.



When the 'Automatic Spell Check' option is selected, as users type, incorrectly spelled words are displayed in red text.

Name	>	>	Value	>
> Family Description	abc		This <i>itmes</i> is <i>avabile</i> in multi <i>coolors</i>	
> Brand Name	abc		Hanes	
> Product Name	abc		Hanes Beefy-T Short-Sleve T-Shirt	

If the 'Automatic Spell Check' is disabled, then selecting the 'Spell Check' action while in a field checks that field's spelling. If a user selects one of the incorrectly spelled words and navigates back to the Spelling menu, STEP will offer possible spelling corrections.

The screenshot shows the 'Spelling' menu open, with 'Spell Check' selected. A list of corrections is displayed: available, avalanche, availably, salable, and assailable. In the background, the data table from the previous image is visible, with the 'Family Description' field highlighted.

Asset

When an asset is selected in Tree, the 'Asset' menu shows various options to manage and change assets.

The screenshot shows the 'Asset' menu open, displaying several options: Edit Asset, External Viewer, Replace Asset Content, Create Local Content of Asset, Update System Properties, and Delete Local Content of Asset. The 'Asset' menu item in the background is highlighted.

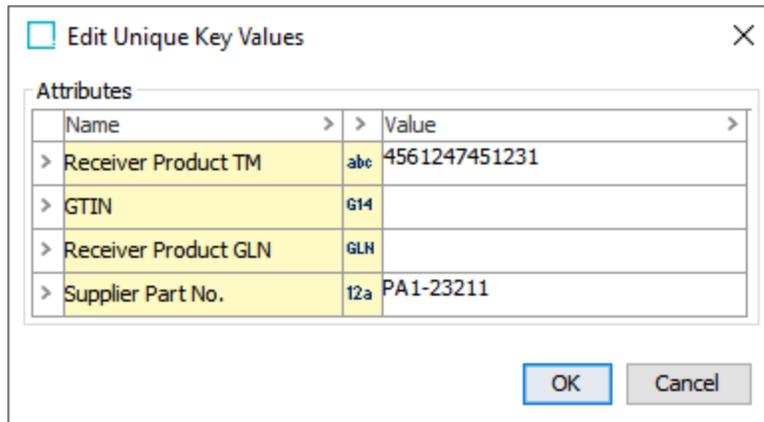
Note: If no object is selected or a non-asset node is selected, all of the 'Asset' menu options are disabled.

- The 'Edit Asset' action will open the asset in the program that is associated with the selected file type, like Adobe Acrobat for PDFs.
- The 'External Viewer' will open the asset in a program on the user's local computer.
- The 'Replace Asset Content' action will allow users to replace the asset with local assets.
- The 'Create Local Content of Asset' option initiates an asset push and downloads the asset.
- The 'Update System Properties' action refreshes the asset's system properties in the 'Images & Documents' tab of the asset.

- After selecting the 'Create Local Content of Asset' action, the 'Delete Local Content of Asset' option is enabled and allows a user to delete that downloaded asset.

Edit Unique Key Values

Unique Keys provide a special way of designating objects for identification outside of STEP. Selecting the 'Edit Unique Key Values' action on an object with active unique keys will display the 'Edit Unique Key Values' dialog, allowing users to edit any unique key related attributes on the object.

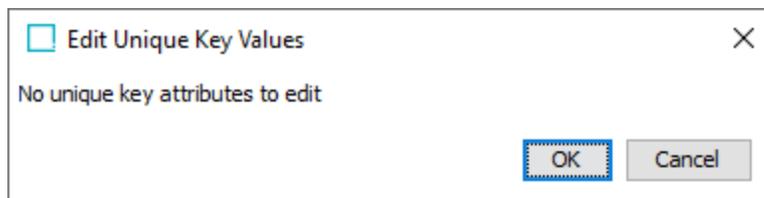


The dialog box titled "Edit Unique Key Values" contains a table with the following data:

Name	Value
Receiver Product TM	abc 4561247451231
GTIN	G14
Receiver Product GLN	GLH
Supplier Part No.	12a PA1-23211

Buttons: OK, Cancel

If there are no active unique keys for the selected object, then the following message displays.



The dialog box titled "Edit Unique Key Values" displays the message: "No unique key attributes to edit".

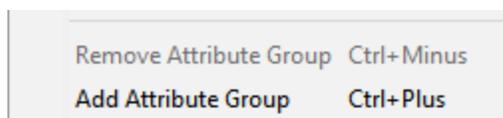
Buttons: OK, Cancel

For more information, see the **Unique Keys** topic of the **System Setup / Super User Guide** documentation.

Remove / Insert / Add Options

At the bottom of the Edit menu are two options that will change based on the selected node or current view. The following are a sampling of what may appear:

On attribute references



Remove Attribute Group Ctrl+Minus
Add Attribute Group Ctrl+Plus

On the sub-products tab of a Product object

Remove Row(s)	Ctrl+Minus
Add Product	Ctrl+Plus

On Lookup tables

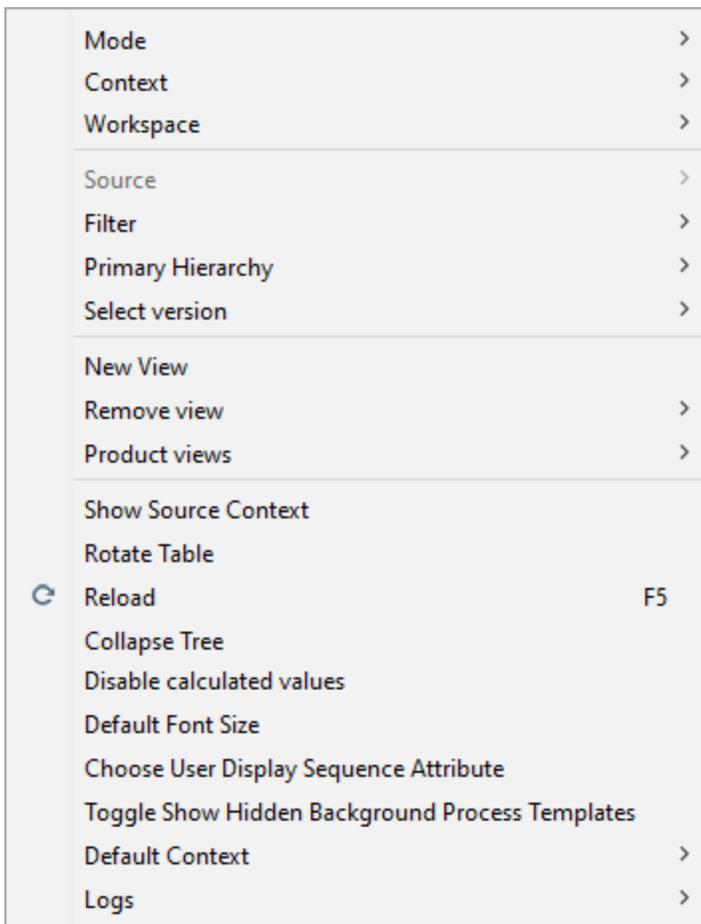
Remove Row(s)	Ctrl+Minus
Add Row	Ctrl+Plus

The options will allow users to add or remove to the selected node as desired.

View Menu

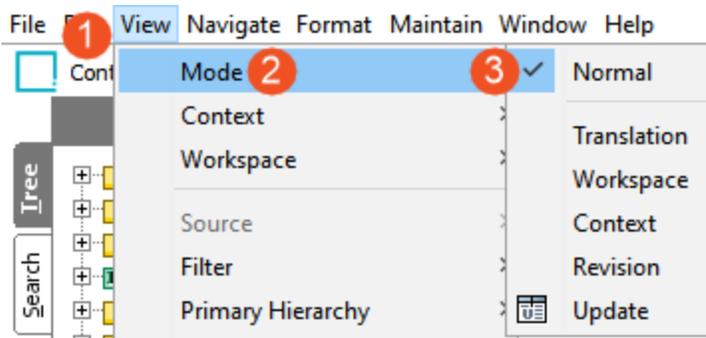
The View Menu's purpose is to change the way a user views objects in the STEP system. In this menu, users may change the viewable workspace, context, and mode, add a filter, change the primary hierarchy, and other options to customize the view to their needs.

Note: This menu does not edit or change any of the values. For more information to edit these values, see the **Maintain Menu** topic of this documentation.



Mode

The 'Mode' sub-menu includes options that allows the user to view STEP data in a variety of ways, dependent on the need. These options are mirrored on the toolbar. For more information, see the **Toolbar** topic in this documentation.

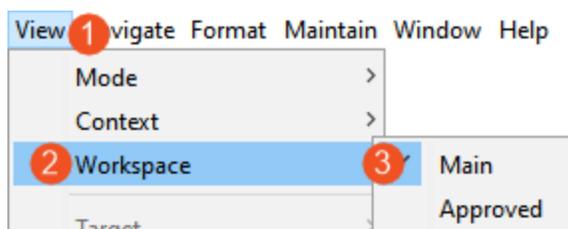


- **Normal** mode is the view where the majority of object maintenance occurs. From the toolbar, it is represented with the  icon.
- **Translation** mode shows the split view of the different contexts for objects. To use the Translation mode, select a Source context from the View menu. From the toolbar, it is the  icon. Online Translation can be done from this Translation Tab. Fields highlighted in green color can be translated within STEP from this Translation Mode. For more information on translating data into other languages, see the **Translations** documentation.
- **Workspace** mode shows a comparison of values between Main and Approved workspaces. From the toolbar, it is the  icon. For more information on workspaces, see the **Workspaces** topic in the **System Setup / Super User Guide** documentation.
- **Context** mode shows a comparison of values between different contexts. From the toolbar, it is the  icon. For example, this will allow a user to view values for all languages or for all price versions. For more information on contexts, see the **Contexts** topic in the **System Setup / Super User Guide** documentation.
- **Revision** shows a comparison of values between different revisions. From the toolbar, it is the  icon. If you have selected any object in STEP, then switched to the revision view, it will show a comparison screen of the two latest revisions. The latest revision is displayed in the first column and the older revision is displayed next. These revisions are also listed under the Status tab in a product editor. For more information on managing revisions, see the **Revisions** topic of the **System Setup / Super User Guide** documentation.
- **Update** shows a comparison between objects across workspaces (Approved and Main) and allows the user to update the object in the current workspace from a source workspace.

Context

When an object is selected, 'Context' displays all available contexts in a dropdown. By selecting one of these contexts, the viewed context for the current object and all other objects, is changed to the selected context.

Workspace



Workspace shows all available workspaces. It is possible to change the viewed workspace and view objects as they appear in different workspaces. In this example, there are only two workspaces: Main and Approved. However, more can be added as desired. For more information on setting up and using workspaces, see the **Workspaces** topic in the **System Setup / Super User Guide** documentation.

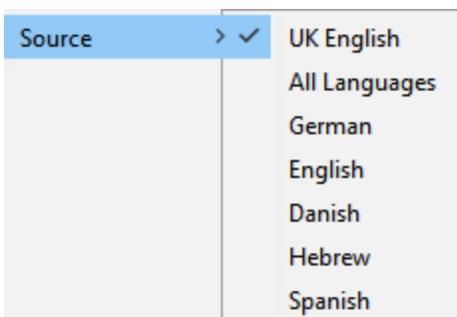
In the toolbar next to the context selector, a toggle icon () allows you to switch between the Main and Approved workspaces.

Target / Source

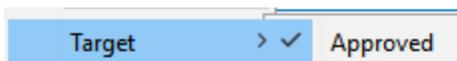
The 'Target' and 'Source' sub-menu allows users to choose alternative dimensions to show in the Context mode.

Depending on the view chosen, this function label changes from target to source.

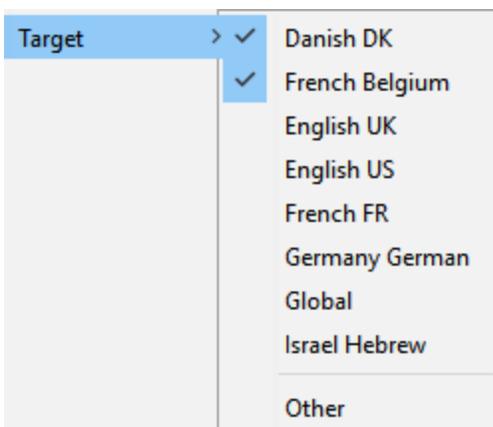
- In the Translation view, this allows the user to select the source language.



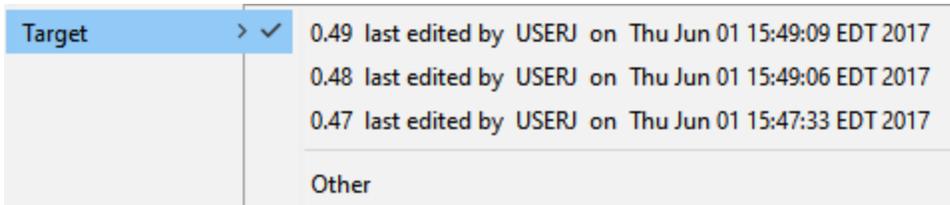
- In the Workspace view mode, this allows the user to select the target workspace.



- In the Context view mode, this allows the user to select a single target as context or multiple contexts to compare the content.



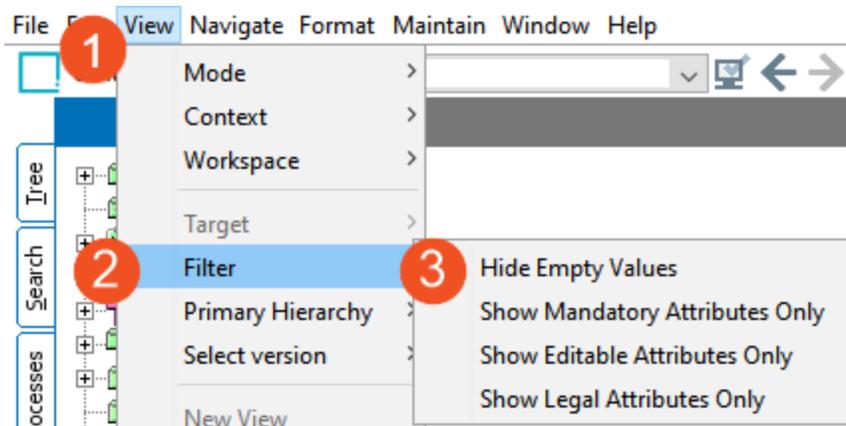
- In the Revision view mode, this allows the user to select a past revision(s), provided there is a recorded change in STEP. If the revisions are older than the current session, the 'Other' option will display a window to select necessary revision for comparison. When the Revision view is selected, the selected object will show the current version and the immediately previous version. By using target, users may select specific revisions for comparison.



- In the Update view mode, this allows the user to select the source workspace.



Filter

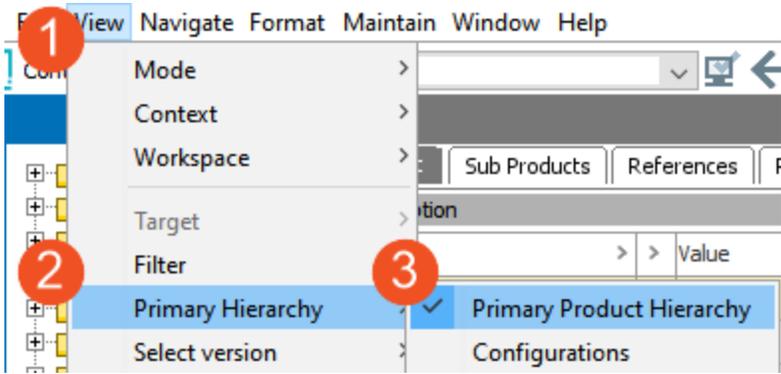


Select a view to filter out empty attribute values, show only mandatory attributes, show only editable attributes, and/or show only legal attributes.

Primary Hierarchy

An object may be located in multiple hierarchies. When locating objects, there may be a reason that a user wants the object's path to specify one of those hierarchies instead of all the applicable hierarchies. Changing this view can be done by switching the primary hierarchy view used for workbench. This path is displayed in the object details within workbench, but the path is also used when navigating to an object via a search results set.

For example, object 12345 is in a supplier hierarchy and a primary product hierarchy. When doing a search for object 12345, upon clicking the 12345 link in the search results, User A wants the object to be displayed in the Tree within the primary product hierarchy. User B wants to click on the 12345 link and be taken to the object within the suppliers hierarchy. Both scenarios can be accommodated when each user sets their own view.



An objects' path can be changed based on the selected primary hierarchy. To change the display view, select Primary Hierarchy from the View menu, and then select the desired hierarchy. For many, the Primary Product Hierarchy will be the default selection.

In the below example, Object 0726222 is a product object type being viewed in the Primary Product Hierarchy. This path echos the location of the object in the Tree tab.



Examples of how objects will be displayed can be seen with the Merchandising Hierarchy selection. Notice the changed path and the object's location in the Tree tab.



Select Version

Allows the user to set the default publication or version used for proofing.

New View

Select multiple products from Tree to enable this option and display a multi-editor tab where a view can be used. Views are not valid with non-product object types. Multi-Editors and views are defined in the **Editing Objects in Tree** topic. A view allows a user to customize the attributes shown for more than one object, instead of displaying all attributes for all selected objects.

Remove View

Select multiple products from Tree to enable this option and display a multi-editor tab where a view can be used. Views are not valid with non-product object types. Multi-Editors and views are defined in the **Editing Objects in Tree** topic. A view that is no longer needed can be remove with this menu option.

Product Views

Select multiple products from Tree to enable this option and display a multi-editor tab where a view can be used. Views are not valid with non-product object types. Multi-Editors and views are defined in the **Editing Objects in Tree** topic. The Product Views option displays all saved views.

Show Source Context

Attribute names may be translated. This option allows a user to view attribute values in both a foreign language and in the source language.

Rotate Table

This will flip the selected table so that the columns become rows and vice versa. This is most often used in a multi-product editor.

Reload

Retrieves updated information from the database including other users' changes.

Collapse Tree

Collapses the folders in the Tree navigator.

Disable calculated values

Disables the automatic calculation of calculated attributes. This will make the STEP interface load faster.

If **Disable calculated attributes** is checked, calculated attributes can be rendered one-by-one by clicking the **Calculate button** on a calculated parameter in the product editor.

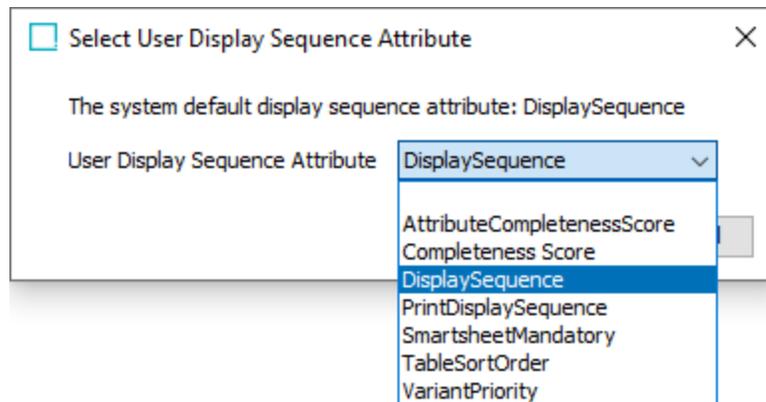


Default Font Size

Allows the user to change GUI font.

Choose User Display Sequence Attribute

Allows the user to select a user-specific Display Sequence Attribute. This option is different from the Attribute set under Users & Groups in System Setup. For more information on using Display Sequence Attributes, see **Display Sequence Attribute** topic in the **System Setup / Super User Guide** documentation.



Toggle Show Hidden Background Process Template

Once selected, any previously hidden Background Process Template will display.

Default Context

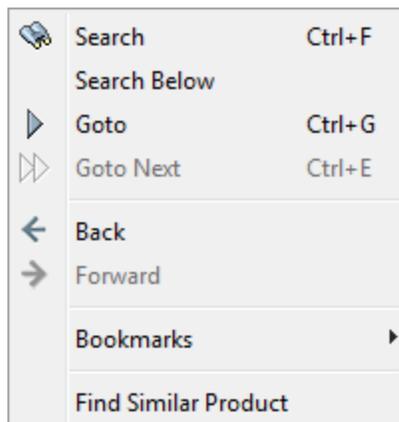
Sets the default context used when logging in.

Logs

Displays Workspace and System Setup logs.

Navigate Menu

The Navigate menu offers options for moving around the workbench.

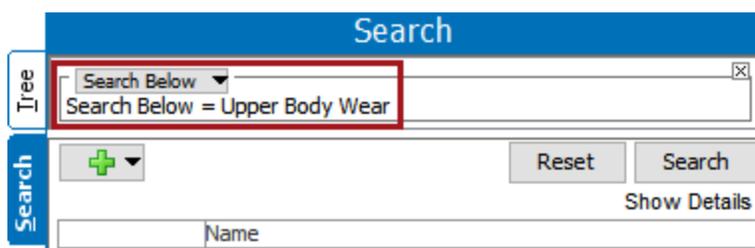


Search

The 'Search' action accesses the 'Search' tab, which displays along the left side of the workbench window. Using the search functionality, users may perform a search of all of STEP objects. For more information on searching within STEP, see the **Navigating and Searching** topic in this guide.

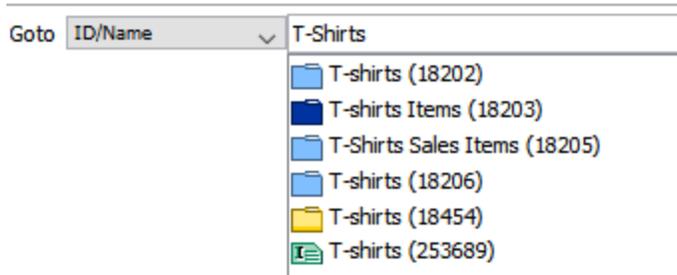
Search Below

Only after selecting an object will the 'Search Below' action become selectable. Once this option is selected, the 'Search' tab will perform populate with a 'Search Below' for that object. Click the Search button to perform this query.



Goto

A quick way to jump to a particular object in the database based on the name, ID, or Unique Key value. A dropdown displays multiple hits and allows the user to select the desired object.



Goto Next

When there are multiple 'Goto' results (or typeahead results) from the 'Goto' function, the user can opt to select 'Goto Next' to continue on to the next hit / result.

As seen with multiple items meeting the criteria for a Goto action, the 'Goto Next' action will cycle to the next object in that list. This list is ordered by STEP IDs.

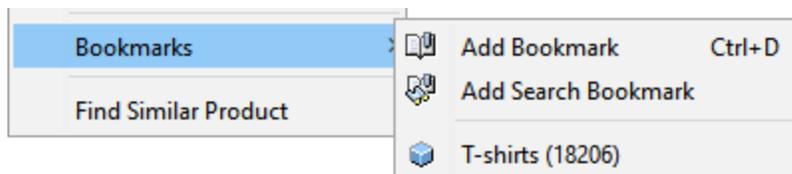
Goto Next will be disabled if the previous Goto command has not been used.

Back / Forward

The 'Back' and 'Forward' actions will function the same as most web browsers. 'Back' allows users to go to a previously visited screen, and 'Forward' returns to the screen from which a user went back.

Bookmarks

The Bookmarks sub-menu allows a user to bookmark the currently displayed object or create and name a search based on the selected object.



Find Similar Product

The Find Similar Product option populates a search based on the attributes and its values of the selected product. When this option is selected, a window will appear prompting the user to check off common attributes to search for.

Important: Attribute values from calculated attributes and inherited attribute values are not searched

Note: The 'Please Select Attributes' dialog shows only the attributes which have values (inherited from context, inherited from hierarchy, local values, and calculated values).

When the attributes are selected, click the 'Select' button, and the user is redirected to Search Tab, which is populated with the Object type and selected attributes with its values.

After clicking the 'Search' button, the selected product(s) which match the search criteria are displayed.

Search

✕
Object Type
▼

Object Type = Product

✕
Search
▼

Search: (BrandName) = Hanes

✕
Search
▼

Search: (BrandOwner) = HanesBrands

+ ▼
Reset
Search

Displaying 1 of 1 results
Show Details

Name	>
■ Cotton T-shirts <i>ID = 18209</i>	>

<

Search Result Profiling

1 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(1\)](#) - [exclude](#)

■ [Item Family \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

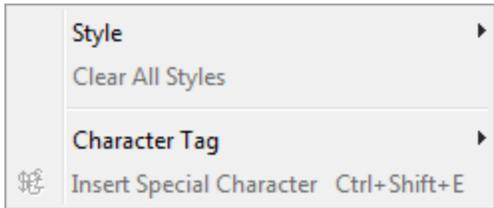
■ [Products \(2\)](#) - [exclude](#)

■ [T-shirts Items \(1\)](#) - [exclude](#)

Note: This search is recommended for externally maintained attributes with validation base types of Text, LOV, and Numeric. It is not recommended for attributes with validation base types like Number, URL, Date, Condition, Multivalued Text, or Multivalued LOV, etc.

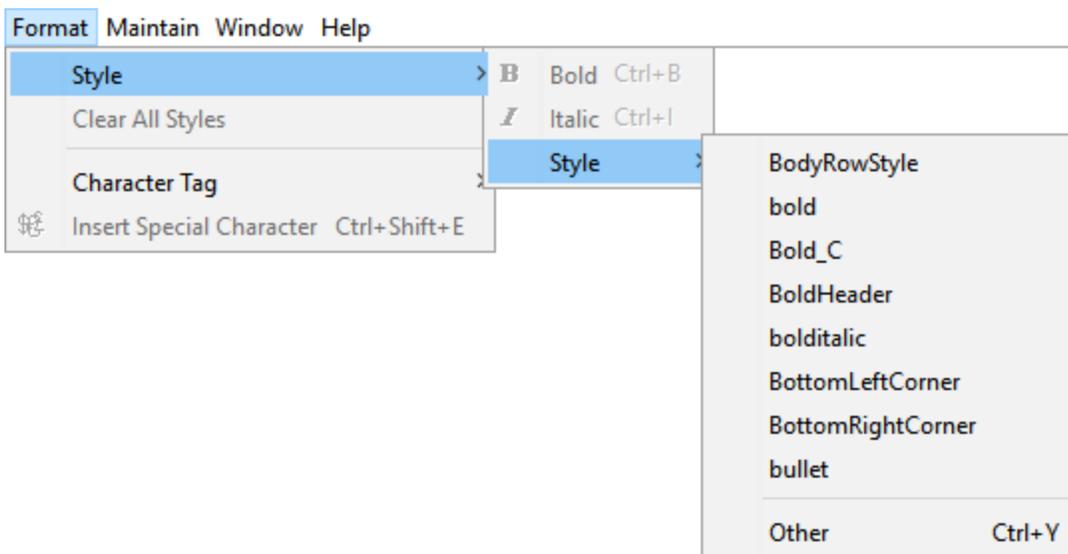
Format Menu

The Format menu contains items for stylizing and transforming text in the workbench.



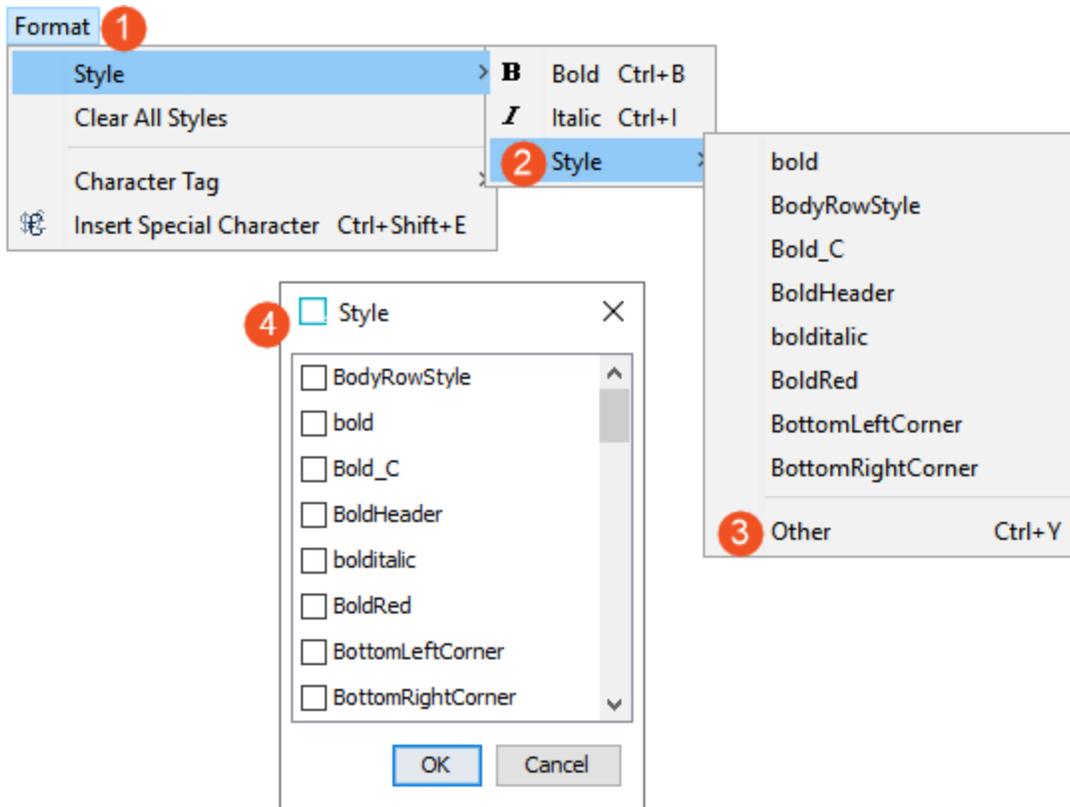
Style

This option allows setting either bold or italics. Users may create their own styles, which will show in this menu.



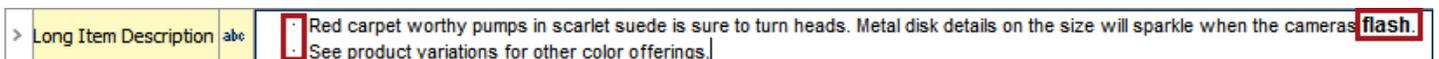
Users can apply style formatting to selected strings of text such as bold, italics, or custom style tags. The secondary 'Style' menu contains a list of additional styles. Selecting any will change the selected text. To add more styles to the list of options, see the **Tags** topic in the **System Setup / Super User Guide** documentation.

Selecting 'Other' from the extended Style menu displays a bank of all the custom styles in the STEP system.



Note: Formatting is limited to free text fields.

In this example, bullets are applied to the Long Description field. The word 'flash' is bold.

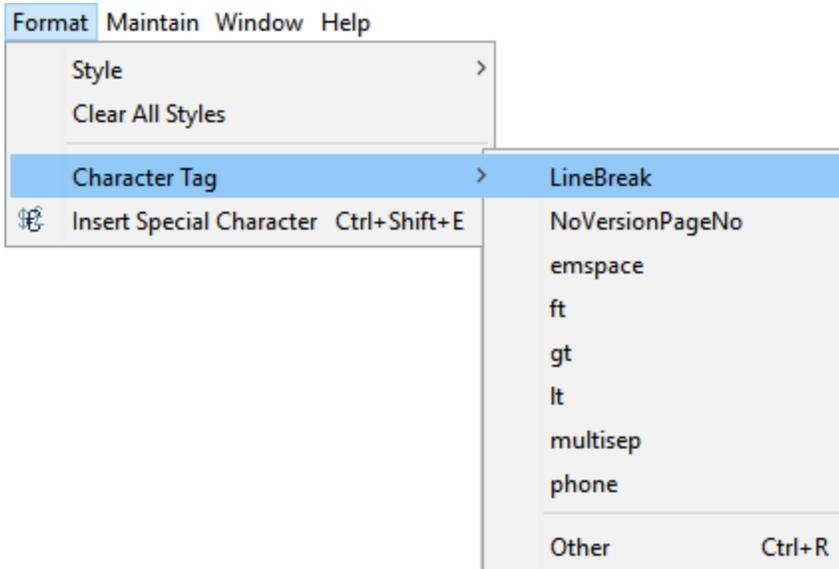


Clear All Styles

This action clears all applied styles on the selected text.

Character Tag

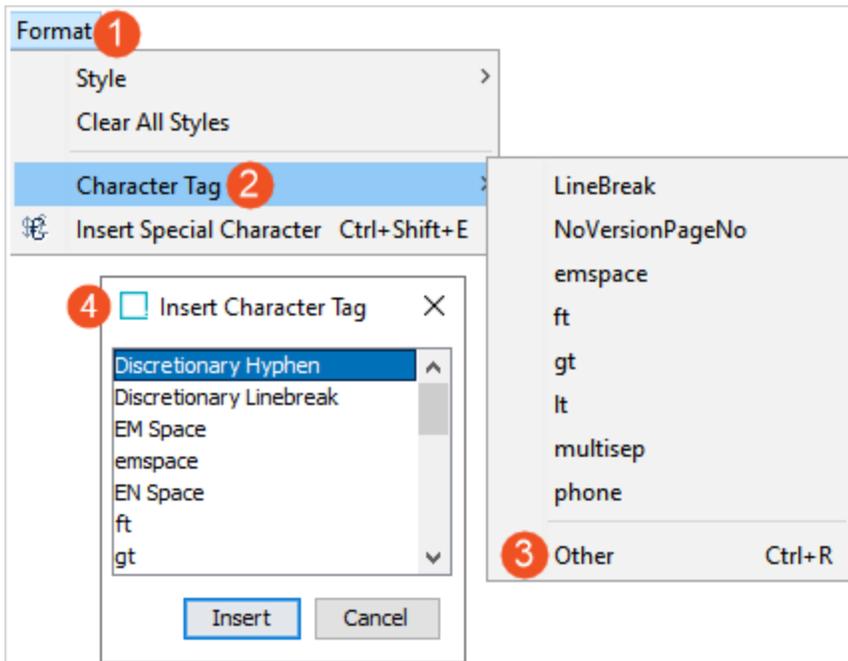
The 'Character Tag' action allows for the insertion of custom-made character tags.



To learn more about editing character tags, see the **Tags** topic in the **System Setup / Super User Guide** documentation. In the example below, a phone character tag is used, followed by a line break, and then a multi-item separator.

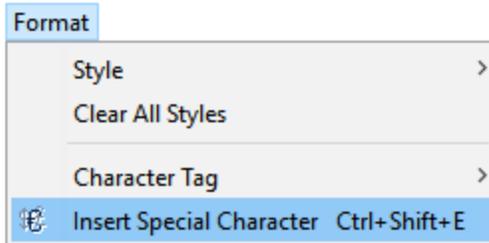


Selecting 'Other' from the character tag menu displays a bank of all the character tags in the STEP system.



Insert Special Character

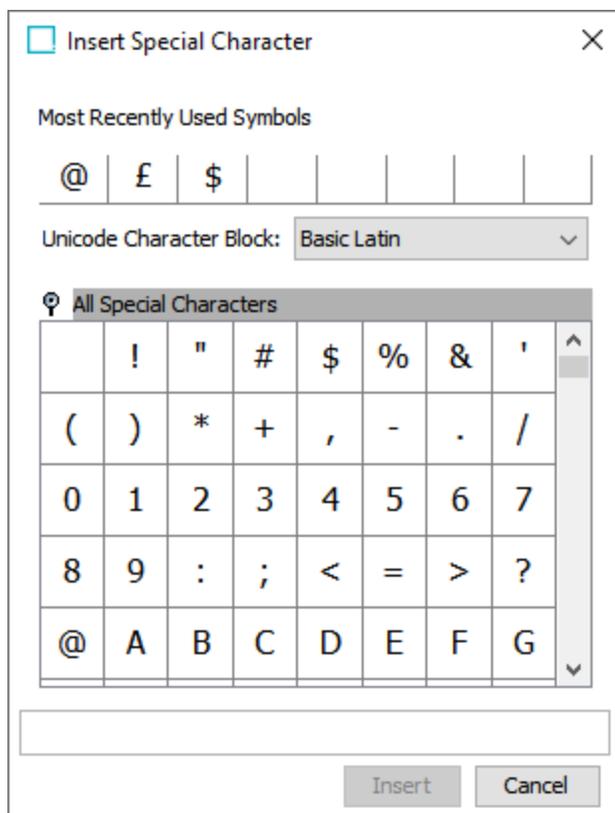
This is an embedded character map. It shows the most recently used characters and offers a complete Unicode character range.



Selecting the 'Insert Special Character' option displays a pop-up of the most recently used symbols.

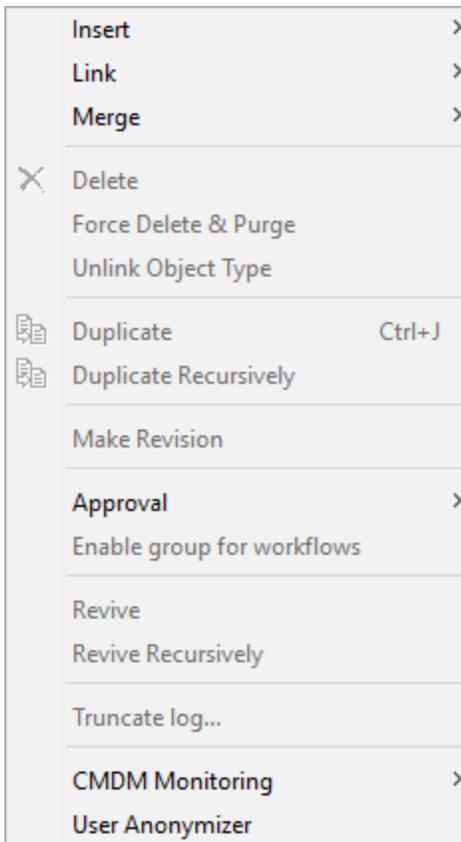


Selecting the 'Other...' option on this pop-up will generate another dialog that allows for selecting all of the special characters, as well as changing the character set to choose from.



Maintain Menu

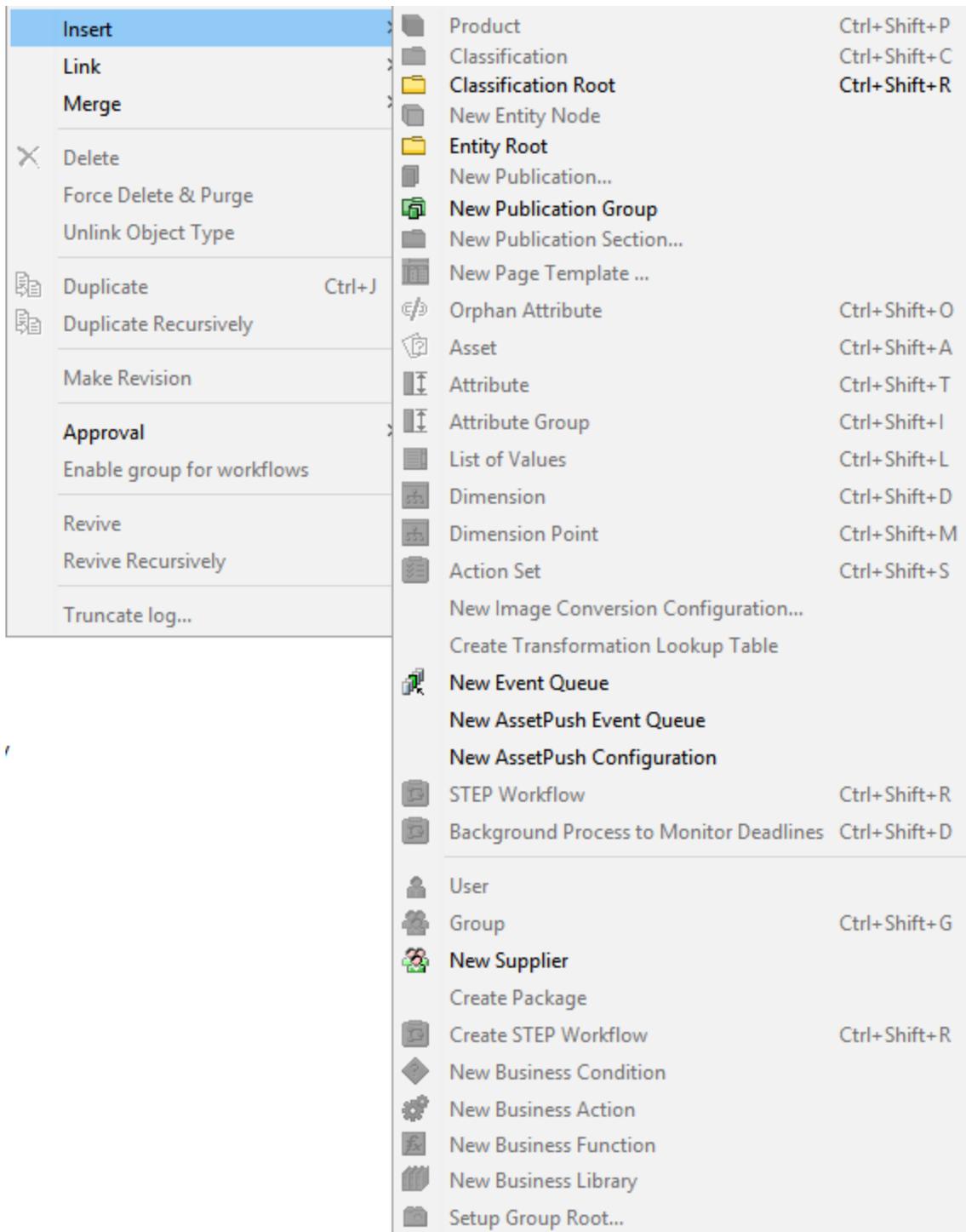
Maintain menu provides the user to maintain STEP data by inserting, linking, merging, deleting, approving and others. Some options, such as Customer MDM Monitoring and User Anonymizer, are only available if the functionality is activated via a license and/or add-on component. Many options have additional options and are explained below:



Insert

The 'Insert' action allows the user to create an object based on the currently selected object. The options are disabled based on the selection.

Note: It is also possible to create objects products, classifications, entities, publications, and assets when right-clicking in STEP. For more information on object creation, see the **Creating Objects in Tree** topic of this guide.



The following options are available in the Insert sub-menu:

- **Product** – If the user is within the primary product hierarchy, this option will create a new product beneath the selected hierarchy.
- **Classification** – If the user selected a classification hierarchy, this option allows creation of a new classification folder beneath the selected classification with the predefined classification object types.

- **Classification Root** – If the user would like to have a classification root to store images or configurations or to link products in the classifications folder, this option creates a classification root with a set of predefined classification root object types that are listed.
- **New Entity Node** – If the user selected an entity root, this option will create a new entity object based on one of the predefined entity types.
- **Entity Root** – A new 'Entity Root' can be created in the tree hierarchy from predefined set of entity root object types.
- **New Publication...** – Allows the user to create a new publication. If the user has already selected a publication hierarchy, then when this option is chosen, 'Create Publication' dialog will displayed with default object type selected. The user must provide a name of the publication and 'Page Template,' 'Product Template,' and 'Publication Template' to create a new publication.

Note: The 'Create' button in the 'Create Publication' dialog will be enabled only if the user has selected a publication template.

- **New Publication Group** – Allows the user to create a new publication group within the selected publication group. If a publication group is selected, once this option is chosen, 'Create Publication Group' dialog will display with the predefined set of object type.
- **New Publication Section...** – The user will get a wizard to create 'New Publication Section.' When selecting this option, the 'New Section' dialog will display. Complete the Section Name and select the Page Template from the dropdown list.
- **New Page Template...** – Allows the user to create a new page template. After selecting a 'Publication Group,' this option will display a wizard Create New Page Template in STEP.
- **Orphan Attribute** – This allows the user to add an attribute as an orphan attribute to a product by searching or browsing from System Setup tab. For information, see the **Linking Orphan Attributes** topic in the **System Setup / Super User Guide** documentation.
- **Asset** – Allows the user to create placeholder with ID and name for a new asset on the selected classification folder. The user may choose an asset object type from the Create Asset dialog, then asset content can be added.
- **Attribute** – Allows the user to create a new attribute in the selected attribute group in System Setup.
- **Attribute Group** – Allows the user to create a new attribute group in System Setup.
- **List of Values** – Allows a user to create new list of values under Lists of Values Group / LOVs in System Setup. User will be allowed to key in ID and Name in the Create LOV dialog.
- **Dimension** – This option will create a new dimension. A user must select the 'Contexts' node in the System Setup for this option to be available. For more information on dimensions, see the **Dimensions and Dimension Points** topic in the **System Setup / Super User Guide** documentation.
- **Dimension Point** – Allows the user to create new dimension point. A user has to select a dimension under System Setup > Contexts > Dimension (for example 'Language'). The label of this option changes dynamically based on the selection of dimension, so the option 'Dimension Point' is never displayed. For example, if the user has chosen 'Language' as Dimension, this option will be labeled as 'New Language'.
- **Action Set** – This option creates a new setup or user action. A 'Create Action Set' dialog displays with ID and Name to be filled when user selects the option Action Set. Creating a setup or user action is based on which

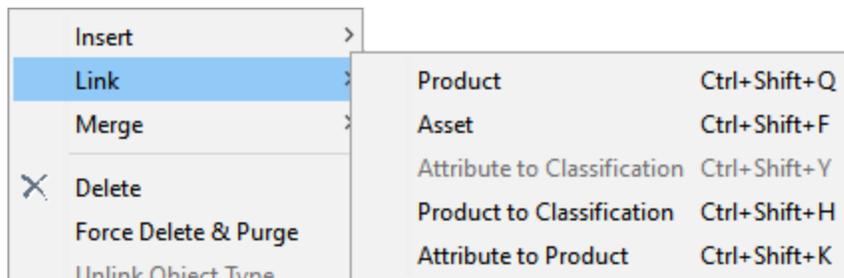
node is selected in System Setup. For more information on action sets, see the **Maintaining Action Sets** topic in the **System Setup / Super User Guide** documentation.

- **New Image Conversion Configuration...** – A wizard will display to create new image conversion configuration and save it for reuse in the selected classification folder. For more information on image conversions, see the **Image Conversion Configuration** topic in the **Digital Assets** documentation.
- **Create Transformation Lookup Table** – Allows the user to create a transformation lookup table under the selected classification. For more information, see the **Transformation Lookup Tables** topic in the **Resource Materials** online help.
- **New Event Queue** – The user can create a new event queue in System Setup. For more information, see the **Creating a New Event Queue** topic in the **System Setup / Super User Guide** documentation.
- **New Asset Push Event Queue** – The user can create a new asset push event queue in System Setup and it will create a new event queue. The event queue can have any number of asset push configurations running from it. For more on assets push events, see the **Creating and Maintaining Asset Push Event Queues** topic in the **Digital Assets** documentation.
- **New Asset Push Configurations** – A new asset push configuration will be created under the selected Asset Push Event Queue. For more on assets push configurations, see the **Creating and Maintaining Asset Push Configurations** topic in the **Digital Assets** documentation.
- **STEP Workflow** – This will create a new workflow under System Setup > Workflows when the user first selects 'Workflows' in 'System Setup'. The STEP Workflow designer window will display. It is also possible to create a workflow by right-clicking on the 'Workflows' folder. For more information on workflows, see the **Workflows** documentation.
- **Background Process to Monitor Deadlines** – When first selecting the System Setup > Workflows node, this option starts a background process for checking STEP Workflow items that have exceeded their deadlines.
- **User** – Users are created by first selecting System Setup > Users & Groups > Group where the user will belong. When a user selects a Group and select this option, the 'Enter New User' dialog displays. For more information on users in STEP, see the **Working with Users** topic in the **System Setup / Super User Guide** documentation.
- **Group** – Groups are created by first selecting System Setup > Users & Groups > and selecting the necessary node to hold the group. For more information on groups in STEP, see the **Working with User Groups** topic in the **System Setup / Super User Guide** documentation.
- **New Supplier** – Supplier users are created in System Setup > Supplier Group. A new supplier can be created by first selecting the supplier group.
- **Create Package** – Creates a package by first selecting System Setup > Change Package. After the user has selected the change package option, a 'Create Change Package' dialog displays. Enter an ID and Name of the Package. For more information on packages, see the **Change Packages** topic in the **Configuration Management** documentation.
- **New Business Condition** – Creates a new business condition under Global Business Rules in System Setup. Business Conditions can also be created under Workflows in System Setup. For more information on business conditions, see the **Business Conditions** topic in the **Business Rules** documentation.
- **New Business Action** – Creates a new business action in System Setup under Global Business Rules. Business action can also be created under Workflows in System Setup. For more information on business actions, see the **Business Actions** topic in the **Business Rules** documentation.

- **New Business Library** – Creates a new business library in System Setup under Global Business Rules. Business libraries can also be created under Workflows in System Setup. For more information on business libraries, see the **Business Libraries** topic in the **Business Rules** documentation.
- **Setup Group Root...** – Creates a new setup group root under System Setup. When the user selects this option, the 'Create Setup Group Root' dialog displays with set of object types. The user may create a new setup group root based on the object the object type selected.

Link

The 'Link' action provides a list of object or reference types for linkable actions. This menu will only show the relevant options as active if it is possible on the selected object.



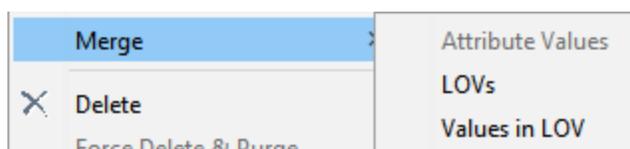
Based on the source object there are different link options available with keyboard shortcuts shown in the above screenshot.

- When a user selects a product hierarchy and clicks on Link > Product, the product is linked to the selected product via a product reference type dropdown.
- When a user selects a product hierarchy and clicks on Link > Asset, the asset is linked to the selected product via an asset reference type dropdown.
- When a user selects an attribute, it can be linked to classifications.
- When a user selects a classification, it can be linked to products.
- When a user selects an attribute, it can be linked to products.

For more information on linking your attributes to products, see the **Creating a Product Attribute Link** topic in the **System Setup / Super User Guide** documentation.

Merge

Depending on the selected object, the user can merge attributes, LOVs, and LOV values. For more information, see the **Merging Attribute Values** topic, the **Merging Values in an LOV** topic, or the **Merging LOV Values in Bulk** topic in the **System Setup / Super User Guide** documentation.



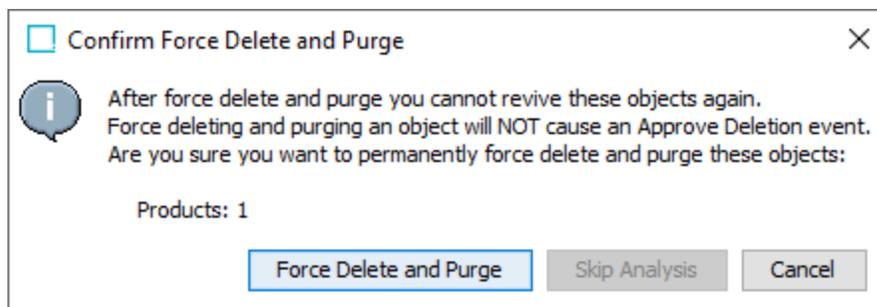
Delete

In STEP, the 'Delete' action sends items to the Tree Recycle Bin. If the selected item for deletion contains child objects, the user will receive a warning that these items will also be deleted. For more information, see the **Recycle Bin for Tree** topic of this guide.

Note: The keyboard 'Delete' button does not delete objects in STEP Workbench.

Force Delete and Purge

If an object is selected in the workbench, and 'Force Delete and Purge' is clicked, the Confirm Force Delete and Purge dialog is displayed. Click the 'Force Delete and Purge' button to permanently delete the object and purge it from the recycle bin without any further opportunity to cancel.



Unlink Object Type

When in System Setup, this option allows a user with the appropriate privileges to unlink the selected object type from its parent.

Duplicate

This standard 'duplicate' operation essentially copies and pastes in one click. Users may also right-click while selecting multiple objects and duplicate each of them. A prompt will request a new ID when an auto ID is not set, then automatically provides a different name. The user is also allowed to indicate if duplicate references should be created.

Duplicate Recursively

A hierarchy can be duplicated when the user selects the top node in the hierarchy and clicks 'Duplicate Recursively.' The ID should be editable for duplicate recursively.

In the below example, the ID is auto generated so the duplicate recursively background process will ultimately give an error.

Name	>	>	Value
ID	>	>	IconRoot
Name	>	>	Icons
Object Type	>	>	Icons
Revision	>	>	0.1 Last
Approved	>	>	✓ App
Translation	>	>	Not Tra
Path	>	>	Classific
Visibility	>	>	
Purpose	>	>	abc Storage
Catalog Group Theme	>	>	abc

Duplicate Recursively
 ✕

i

ID

New Name

Duplicate references

Start Process with Description

Name

OK
Cancel

Make Revision

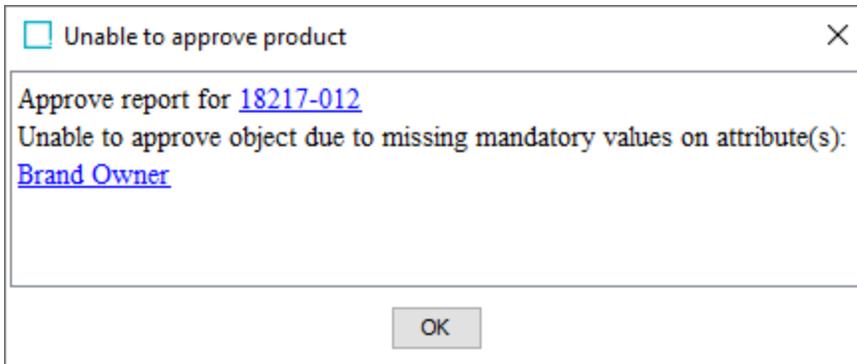
Allows a user to force a revision on a product and provide a comment for explanation.

Approval

The approval options allow objects to be moved to the Approved workspace.

Approve Object	Ctrl+Shift+J
Partial Approve...	
Check Approve	
Approve Deletion	
Approve Recursively	

- **Approve Object** – Approves an object from the Main workspace to the Approved workspace and changes the red X (✖) to either a green checkmark (✔) or a yellow one (⚠). See the **Approval of Objects** section of this guide for more information.
- **Partial Approval** – Approve selected parts of the unapproved changes on the selected object.
- **Check Approve** – The 'Check Approve' action allows the user to see if anything is barring successful approval of an object. In the example below, mandatory values are missing.



- **Approve Deletion** – For an approved object to be removed from the Recycle Bin, the object must be Approve Deleted. If a previously approved object is deleted, in the Recycle Bin it will have a red '(in Use)' header:

20709 rev.0.9 Deleted (in Use)

Performing an Approve Deletion changes the header to 'Not in Use' and allows the object to be deleted.

20709 rev.0.9 Deleted (Not in Use)

For more information, see the **In Use and Not In Use Objects** section in the **Approval of Objects** topic of this guide.

- **Approve Recursively** – Launches a workflow process that will approve the currently selected object and all of its children.

Enable Group for Workflows

This is a disabled legacy option.

Revive

Revives a deleted object, either 'In Use' or 'Not In Use', from the Recycle Bin. For more information, see the **In Use and Not In Use Objects** section in the **Approval of Objects** topic of this guide.

Revive Recursively

Revives a deleted object as well as all of its children, either in use or not in use, from the Recycle Bin. For more information, see the **In Use and Not In Use Objects** section in the **Approval of Objects** topic of this guide.

Truncate Log

Once selecting an Event Queue or Asset Push Queue, this option will reduce the log to the most recent entries. For more information, see the **Event Queues** topic of the **System Setup / Super User Guide** documentation.

Customer MDM Monitoring

Selecting the 'Start background process for monitoring Customer Data Policies' option under Customer MDM Monitoring will manually initiate any of the active data policies in the system. For more information, see the **Data Policies** topic in the **Data Governance** documentation.

User Anonymizer

This option is available to admin users and is used to anonymize a deleted user within the object change logs, revision logs, and workflow status logs. For more information, see the **User Anonymizer** topic in the **System Setup / Super User Guide** documentation.

Window Menu

The Window menu offers actions around the STEP Workbench window.



New PIM Window

This action will create a new instance of the STEP Workbench.

Goto Window

This is a legacy option and no longer functions.

Goto Dashboard

This option will display the STEP Workbench dashboard.



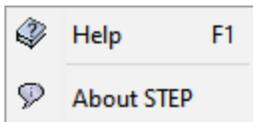
<p>New Item Creation by State STEP Workflow profile is unavailable</p>	<p>Average Time in State STEP Workflow profile is unavailable</p>	<p>Object Type Count Profile generated Tue Jan 26 2016 15:03 in context 'English US', workspace 'Main'</p>  <ul style="list-style-type: none"> ■ Item (79) ■ Sales Item (69) ■ Item Folder (25) ■ Level 3 (23) ■ Level 2 (21) ■ Other object types (105)
		<p>Translation Status Profile generated Tue Jan 26 2016 15:03 in context 'English US', workspace 'Main'</p>  <ul style="list-style-type: none"> ■ Not Translated (322)
<p>Flex Fit Profile generated Tue Jan 26 2016 15:03 in context 'English US', workspace 'Main'</p>  <ul style="list-style-type: none"> ■ Yes (6) ■ No (1) 	<p>Average Object Completeness No data available for context 'English US', workspace 'Main', completeness metric with ID 'Completeness Metric B'</p>	<p>Number of Items in Workflow State STEP Workflow profile is unavailable</p>

Zoom Window

This action will center the STEP Workbench on your primary display.

Help Menu

The Help Menu has two options: 'Help' and 'About STEP'.



Help

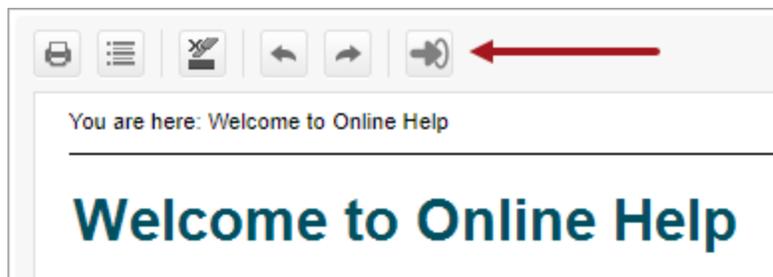
The 'Help' option opens the STEP documentation in your default web browser.

If configured to authenticate, you will be prompted to enter a STEP username and password before online help is displayed. To enable this functionality, the property

OnlineHelp.Documentation.Authentication.Enabled=true must be added to the sharedconfig.properties file. Authentication is disabled by default.

Note: The authentication option will not work with any Single Sign On (SSO) solutions other than LDAP.

A login form with a title bar that says 'Please provide login credentials'. It contains two input fields: 'Username*' and 'Password*'. Below the fields is a blue button with a right-pointing arrow and the text 'Login'.

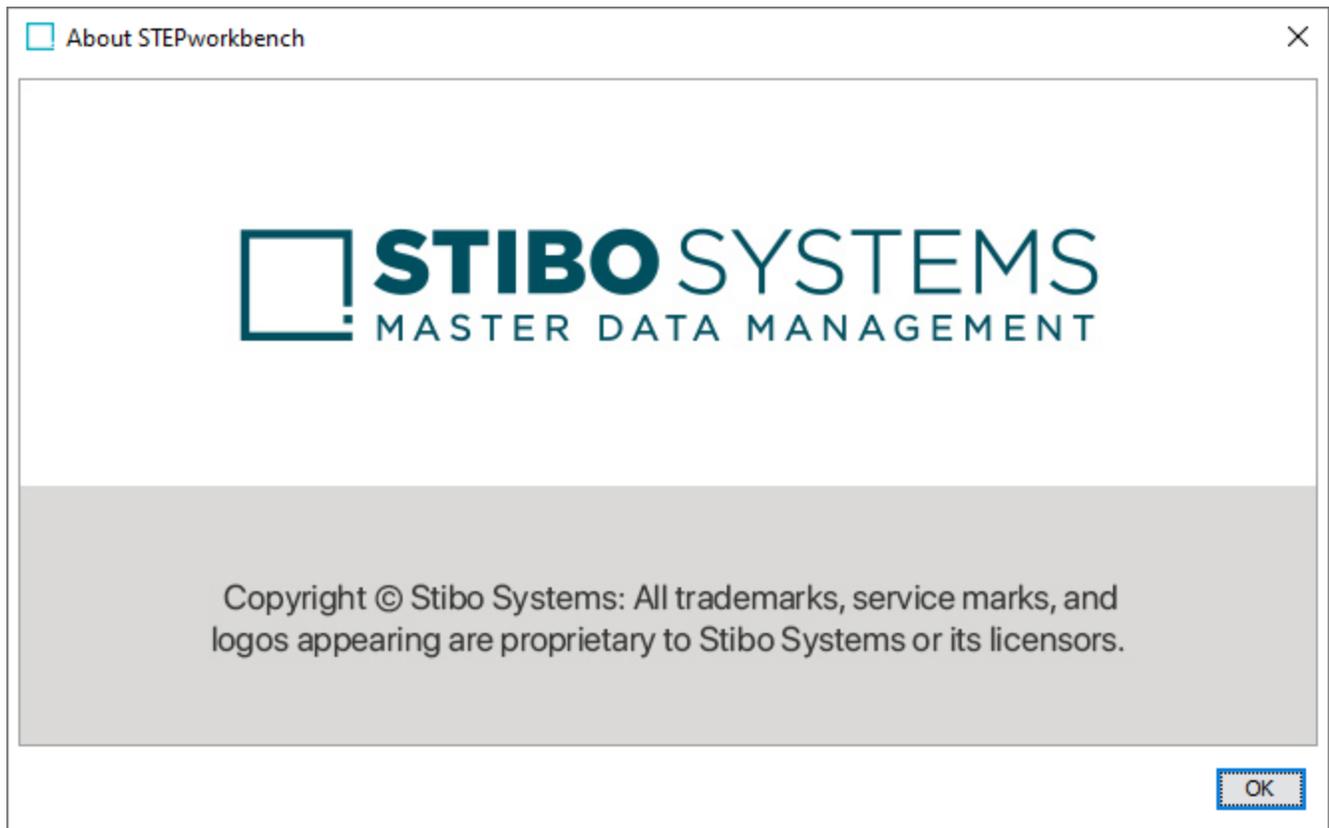


When you are done with online help, you should click the Logout button located on the far right of the online help toolbar. Upon logging out, you will be taken back to the documentation login screen.

If authentication is disabled, the Logout button will still display. In this scenario, clicking on the button will take you to the STEP Online Help welcome page.

About STEP

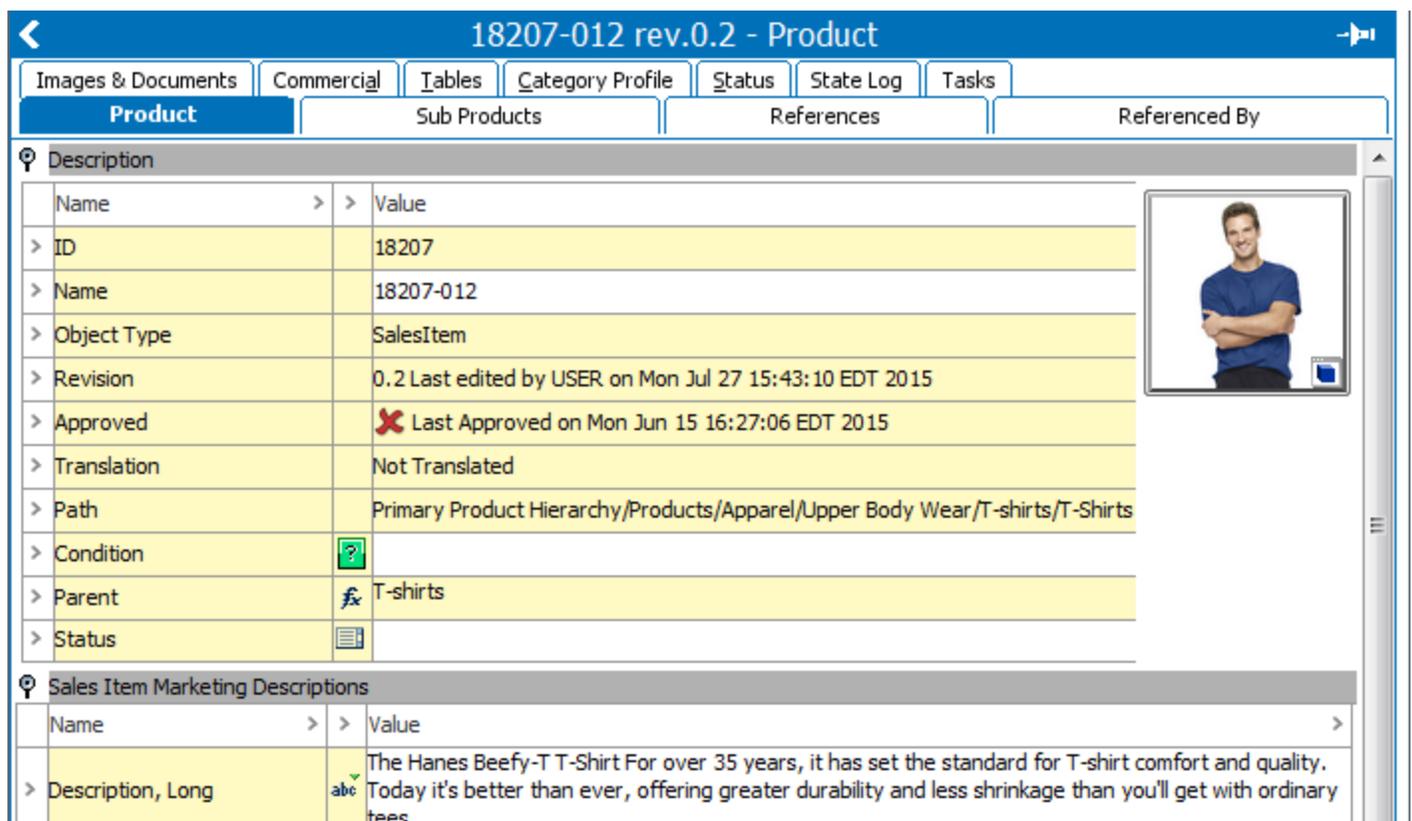
The 'About STEP' option displays the workbench introductory window.



Object Editor

When an object is selected from the left panel in STEP (e.g., Tree tab, System Setup tab, etc.), the right panel displays details on the first tab for the selected object. The left panel can be hidden or displayed by clicking the hide (🔒) and show (🔓) toggle buttons.

The kind and number of tabs will vary depending on the selected object. However, all objects will have at least an ID, Name, Object Type, Revision, Approved, Translation, and Path. These fields are called 'aspects.'



18207-012 rev.0.2 - Product		
Product		
Sub Products		
References		
Referenced By		
Description		
Name	>>	Value
ID	>	18207
Name	>	18207-012
Object Type	>	SalesItem
Revision	>	0.2 Last edited by USER on Mon Jul 27 15:43:10 EDT 2015
Approved	>	✘ Last Approved on Mon Jun 15 16:27:06 EDT 2015
Translation	>	Not Translated
Path	>	Primary Product Hierarchy/Products/Apparel/Upper Body Wear/T-shirts/T-Shirts
Condition	>	
Parent	>	£ T-shirts
Status	>	
Sales Item Marketing Descriptions		
Name	>>	Value
Description, Long	>	abc The Hanes Beefy-T T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.

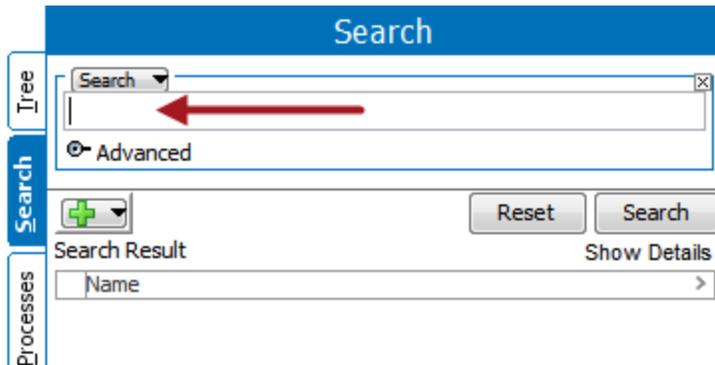
See the **Object Maintenance in Tree** topic within this guide and child topics for additional information on the various object editors available in Tree.

Information on editing non-Tree objects can be found within the relevant sections throughout the STEP documentation (e.g., information on workflow editors is available within the workflows guide).

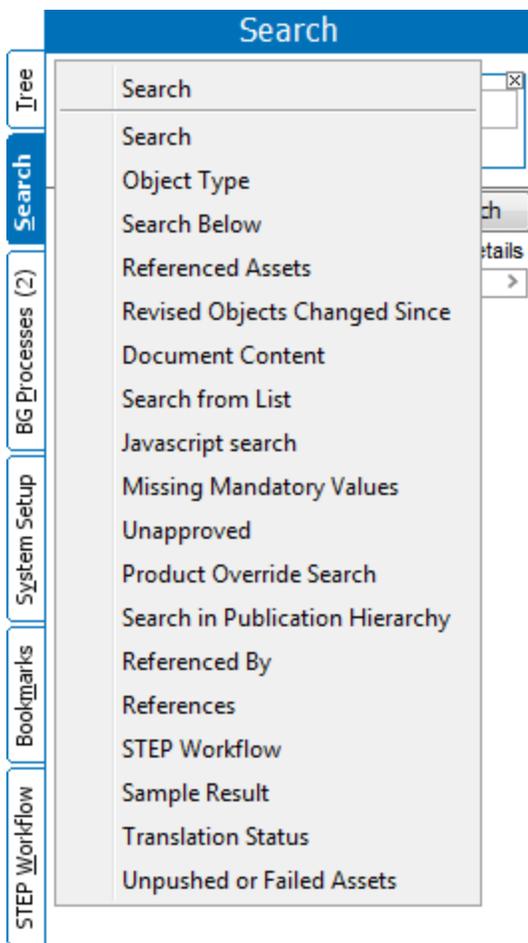
For the product objects in STEP, users can create attributes (description attributes) along with aspects in the first flipper called 'Description.' For more information about description attributes, see the **Description Attributes** topic in the **System Setup / Super User Guide** documentation.

Search Tab

The Search tab allows users to perform simple searches by typing directly into the default search field.



Users can also perform more complex searches by selecting and/or combining additional search criteria.



Below Search Operations can be performed on the entire search result.



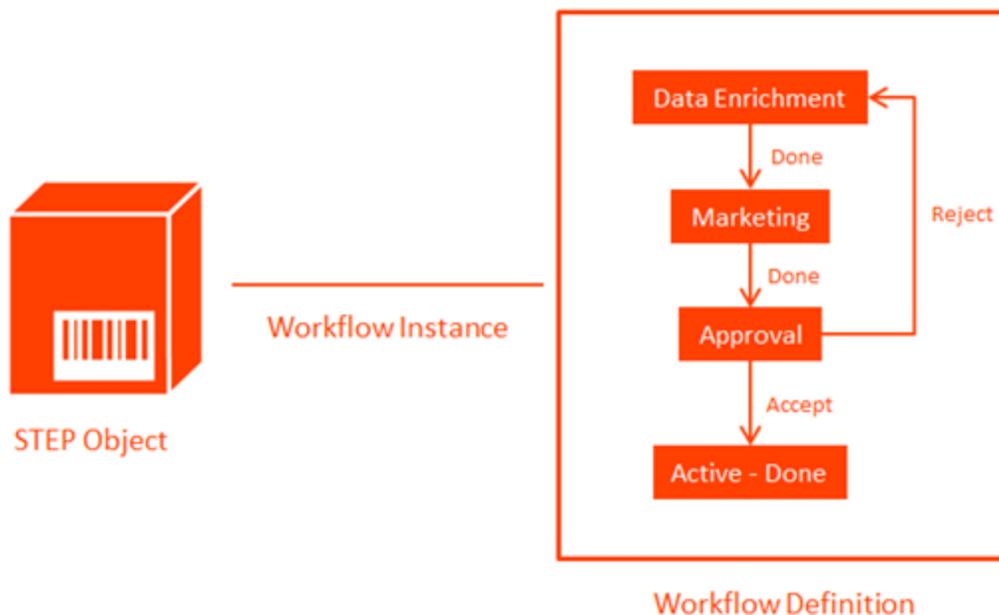
For more information about search operations, see **Search Operations on Entire Result** topic in the **Navigation and Searches** documentation.

For more on searching, see the **Search** section of the **Getting Started** documentation.

STEP Workflow Tab

STEP Workflow is STEP's native functionality for structuring and to some extent automating processes around objects in STEP. Typical examples are Product onboarding processes and change / governance processes.

The concept of STEP Workflows differs from the general concept of a workflow, in that STEP Workflows are data-centric, meaning that each instance of a given Workflow always will be tied to an object in STEP. As illustrated below, technically, a Workflow Instance is a relation between a STEP object and a Workflow definition that also exists as an object in STEP.

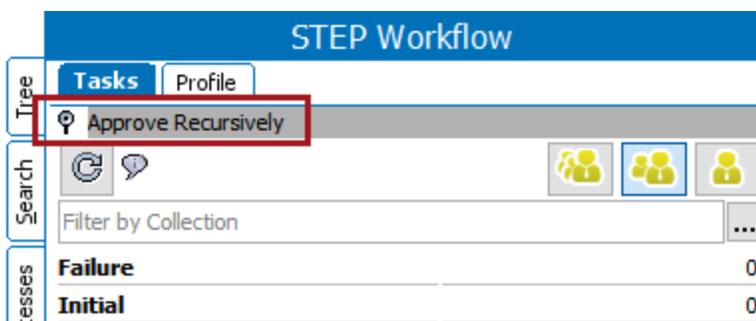


The STEP Workflow tab has 2 sub tabs (Tasks and Profile).

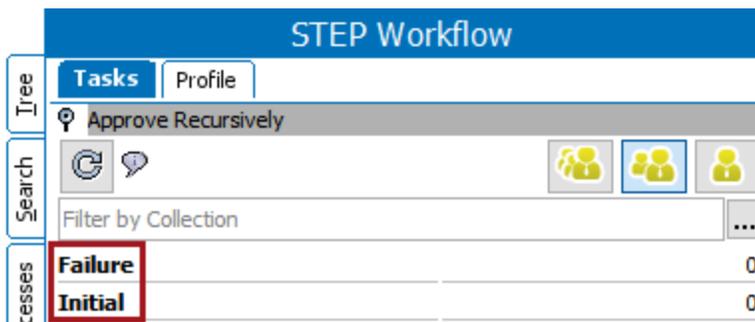
Tasks

The Tasks sub tab is the primary interface for working with workflows in STEP Workbench.

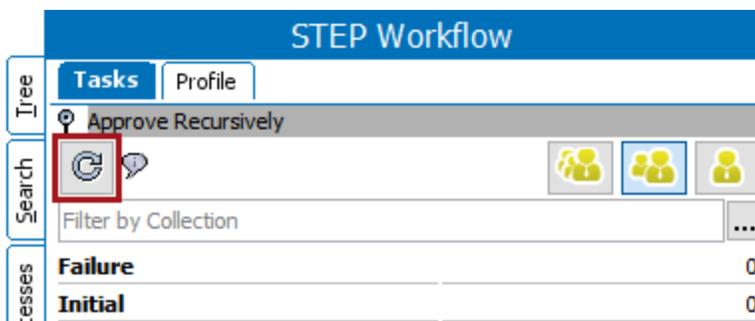
1. Each workflow has a flipper that can be opened to display details about the workflow.



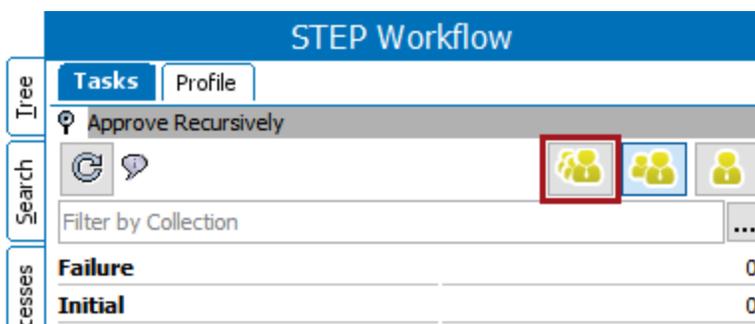
- Administrators can configure which states are displayed for each workflow. The number of tasks for the state are displayed.



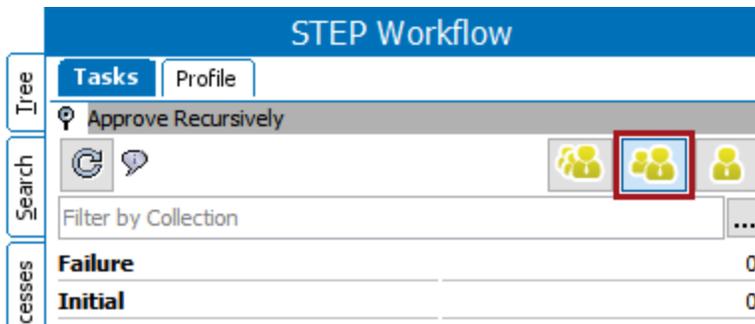
- The Refresh button updates the data displayed for number of tasks in the workflow.



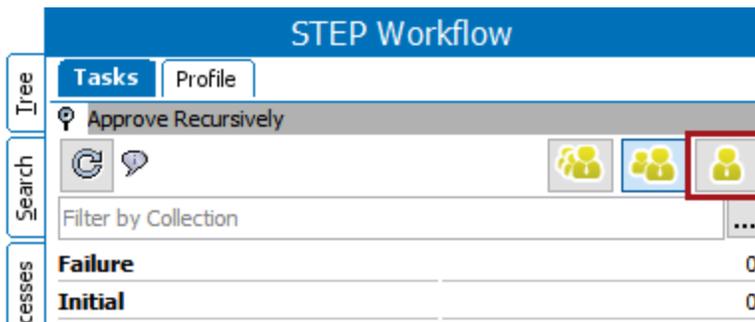
- Clicking the **Show All Items** button displays all tasks in all displayed states, regardless of the assignee. Only users with the STEP Workflow Administrator privilege have access to this button.



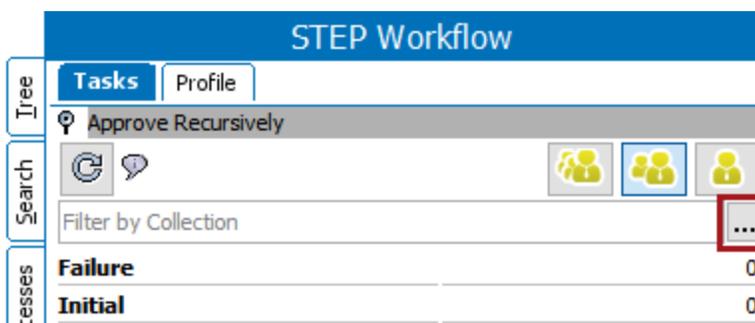
- Clicking the **Show All Items assigned to me or any group I am a member of** button displays tasks directly assigned to the user or any group that the user is a member of.



6. Clicking the **Show All Items assigned to me** button displays only tasks that are directly assigned to the user.



7. Click the ellipsis button (...) to allow users to filter the list of displayed tasks based on a Collection. For example, if a user wanted only to see objects in the workflow where the Color Attribute = Blue, they can first perform an Attribute search on the Search tab, then save the result as a collection, and use that collection to filter the objects to display only those where Color is Blue.



Profile

STEP Workflow

Tasks Profile

KPI_StatusTracking

New Item Creation Profile - By Assignee

New Item Creation Profile - By State 1

New Item Creation Profile - By Workflow

STEP Workflow profile

Configuration last edited by user on 2015-07-23 13:46:21; On-demand data has not yet been generated for this profile

2 Edit configuration 3 Update on-demand data 4 Copy to Clipboard

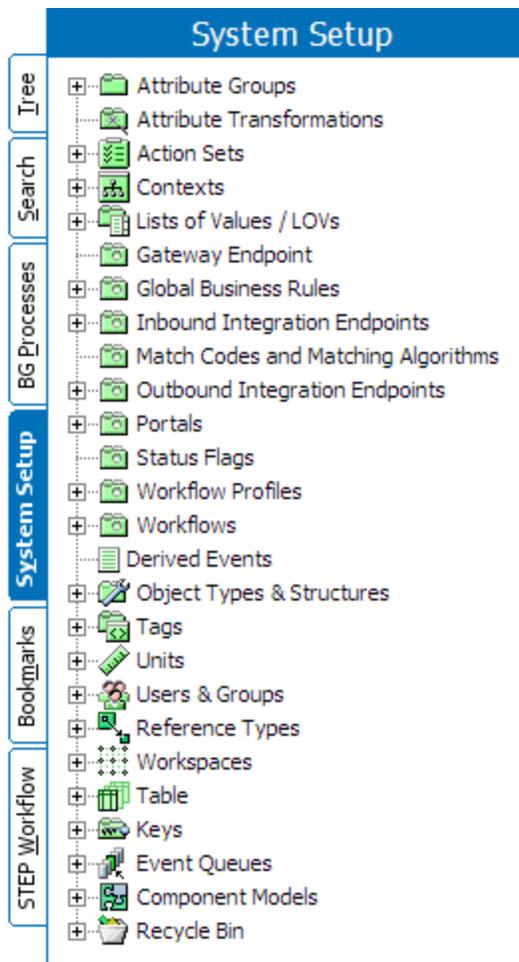
State	STEP Workflow	Items in State	Average time in State
> Copy Writing	SalesItemCreation	11	81 Days
> Copy Writing Cluster	SalesItemCreationNewBR	4	123 Days
> Copy Writing Cluster	SalesItemCreation	11	81 Days
> Copy Writing Ended	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreation	11	81 Days
> Digital Asset Review	SalesItemCreationNewBR	4	123 Days
> Digital Asset Review	SalesItemCreation	11	81 Days

1. Click a Profile link to see details of the configuration.
2. The **Edit Configuration** button allows you to modify the data being profiled.
3. The **Update on-demand data** button runs the profile and updates the data displayed.
4. The **Copy to Clipboard** button saves the data displayed to your computer's clipboard
5. Once saved to the Clipboard, this data can be pasted into Excel for further analysis.

For information on how to configure workflows, see the **Creating a Workflow** topic.

System Setup Tab

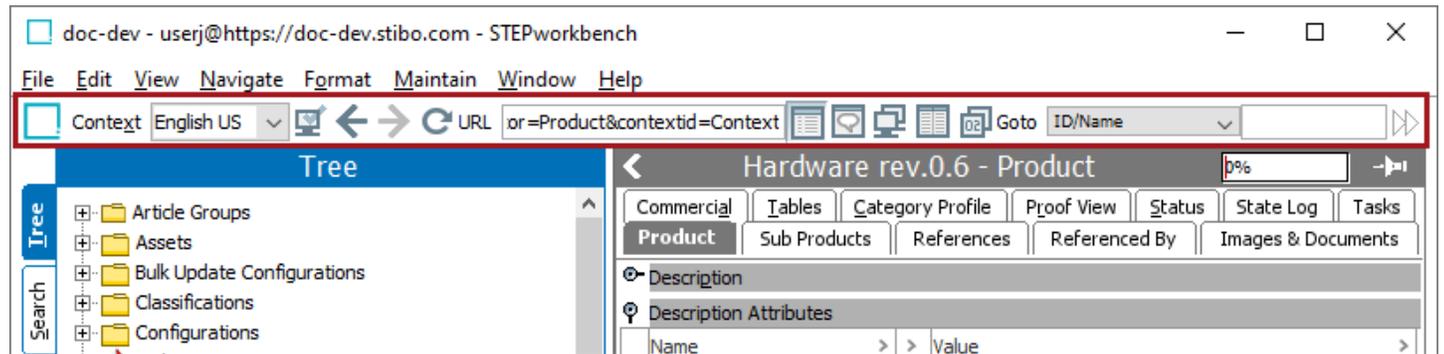
Schema objects are maintained from the System Setup tab. Examples of such objects are Attributes, Action Sets, Contexts, LOVs, Object Types, Tags, Units, Users & Groups, Workspaces, Reference Types, and many more. Most actions performed require Super User access. This is where the core components like integration endpoint, STEP Workflow, Web UI, business rules, etc. are created and configured.



Additional information on the System Setup objects and functions can be found throughout the online help. For example, information on workflows is available in the **Workflows** guide, while information on integration endpoints is available within the **Data Exchange** guide. Information for general functions that are not covered in independent guides (e.g., attributes, references, users and groups) can be found in the **System Setup / Super User Guide**.

Toolbar

The features accessible on the STEP toolbar, (located beneath the menu bar), are geared towards navigating between objects and viewing object data in different ways.



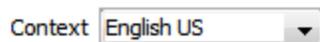
The various features available on the STEP toolbar are described below.

Stibo Systems Logo



Clicking the Stibo Systems logo allows the user to toggle between the STEP dashboard and the STEP Workbench. For more information regarding the dashboard see the **Global Dashboard** section of the **Data Profiling** documentation.

Context List



'Context' acts as a filter that allows a user to view object data defined by, for example, country or language.

To select the context, the user clicks the dropdown and then selects the desired context from those listed. When working in STEP it is useful to check that the context is properly set because viewing data in the wrong context is likely to cause significant confusion. For more information regarding contexts, see the **Contexts** topic in the **System Setup / Super User Guide** documentation.

Workspace Toggle Button

Located to the right of 'Context', the Workspace Toggle button, , switches the user's view of a given object between the 'Main' and 'Approved' workspaces. In the 'Main' workspace, object information is editable. In the

'Approved' workspace, the user will see only those values that have been approved, and may not edit them. For more information on workspaces, see the **Workspaces** topic in the **System Setup / Super User Guide** documentation.

Navigation Buttons



To navigate backward or forward to a previously viewed screen or to refresh the current screen's data, the user can click the 'Back', 'Forward', or 'Reload' buttons, respectively. These buttons are located between the 'Workspace Toggle' button and the URL field. When clicked, these buttons behave in a way similar to most web browsers' 'Back', 'Forward', and 'Reload' functions.

Address Field

URL

To maximize navigability of the STEP tool, all objects may be accessed via an in-tool URL. As with the URL bar in a standard web browser, a product may be reached within STEP by pasting its unique URL into the URL bar. It is important to note that the STEP URL always begins with "**step://**", unlike web URLs which begin with "**http://**" or "**https://**."

Viewing Mode Buttons



STEP enables the user to view STEP data in a variety of ways, dependent on the need. When clicked, each of the five 'View' icons that appear to the right of the URL field in the toolbar present STEP data in different ways. Below are the five view modes described:

Normal mode



This is the default view of the STEP Workbench. With this view selected, users will see a listing of all relevant attribute and metadata associated with that object.

Translation mode



With this mode selected, users can view all object-related data in up to two languages. The data is presented in a comparison display format. STEP automatically highlights in green those attributes that require translation. More information of translations is available in the **Translations** documentation.

Workspace mode



With the 'Workspace' view active, users can see object data as it appears in both the 'Main' and 'Approved' workspaces. This comparison view can be useful by allowing a user to view, at a glance, which values have changed since the object was last approved. However, if the object is in 'Never been approved' status, only the 'Main' workspace will show when this view is active. For more information on workspaces, see the **Workspaces** topic in the **System Setup / Super User Guide** documentation.

Context mode



With this view enabled users can view all of an object's data for two or more available contexts in a comparison display format. The number of contexts viewable at one time is configurable. For more information regarding contexts see the **Contexts** topic in the **System Setup / Super User Guide** documentation.

Revision mode



With this mode selected, users can view the current state of an object's data as well as all previous revisions in a comparison display format. The number of revisions viewable at one time is configurable, but the current and previous versions are shown as the default. For more information on revisions, see the **Revisions** topic in the **System Setup / Super User Guide** documentation.

Goto Field

Goto

This field enables searching for specific objects. To quickly locate objects in the hierarchy by their ID, name, or key, that data can be added into the 'Goto field' and searched on. When the desired item appears in this field, the user can click on it, taking them directly to the object. For more information regarding the Goto field, see the **Goto** topic in the **Getting Started / User Guide** documentation. For more information on keys, see the **Unique Keys** topic in the **System Setup / Super User Guide** documentation.

Tree Tab

This section contains information about how to create and remove local overrides and information about table dimension points.



The above hierarchies and their child objects can be navigated, edited, created, and deleted from the Tree.

The following table is an overview of the different elements of the Tree tab.

Object	Description
Products	It is used to store actual product information. Alternative name is 'Blue folder'
Classifications	It is used to store assets (Images and documents), configurations, and link products. Alternative name is 'Yellow folders' or 'Secondary classification.'
Index Words	An Index structure needs to be created in STEP, in the same way as a 'Classification Hierarchy,' and products are linked into this structure.
Entities	It is used to store the party, supplier data, or contact information. Alternative name is 'White folders.'
Publications	It is used to store print (Example: InDesign) documents and print related configuration like templates, versions, commercial data, and dtp documents. Alternative name is 'Green folders.'

Object	Description
Collections	Collections are containers for storing different sets of objects to perform bulk update or export data.
eCatalogs	It is used to create electronic product catalogs. An electronic product catalog is a data file containing product and price information for a specific product selection. Alternative name is STEP sync.
Recycle Bin	Deleted objects (products, assets, classifications, configurations and entities) are moved to recycle bin from the Tree tab.

It is used to create electronic product catalogs. An electronic product catalog is a data file containing product and price information for a specific product selection. Alternative name is STEP sync.

For further information about objects in the Tree and how to work with them, see the **Basic STEP Concepts** and **Object Maintenance in Tree** topics within this guide.

Object Maintenance in Tree

Regardless of the particular object type or hierarchy that you are working with, the general principles of maintaining objects in the workbench are the same, and are described in the **All Objects** section of this guide. This includes general information on creating, editing, approving, and deleting objects.

Note: The **All Objects** information should be read and understood prior to focusing on any of the object type specific information (links below), as the basic information that is common to all object types is not repeated in the type-specific sections.

Beyond the general object maintenance topics, additional information on working with specific object types in Tree, including details about the various editors and functionalities available on them can be found in the subsequent topics in this guide:

- Assets
- Classifications
- Collections
- Entities
- Products
- Recycle Bin for Tree
- Publications: Information about maintenance of objects in the green publication hierarchy is not covered in this guide. It is located in the **Publication Hierarchy** section of the **STEP Publisher** documentation.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information in this guide focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

A variety of components are also available for maintaining objects in Web UI. For more information, see the **Web User Interfaces** documentation. Additionally, objects are often created or maintained within workflows, or via imports, integration endpoints, bulk updates, etc. These types of object maintenance are outside the scope of this material, but additional information is available in the relevant guides throughout the STEP Online Help.

All Objects

This section covers the basic functionality of creating, editing, and deleting objects in the Tree, as well as providing an overview of the commonalities between the various object editors. Regardless of the particular object type or hierarchy that you are working with, the general principles of creating and maintaining objects are the same.

It is helpful if the **Basic STEP Concepts** topic in this guide has been read and understood prior to reading this material.

A variety of components are available for creating and maintaining objects in Web UI. For more information, see the **Web User Interfaces** documentation. Additionally, objects are often created or maintained within workflows, or via imports, integration endpoints, bulk updates, etc. These types of object maintenance are outside the scope of this material, but additional information is available in the relevant guides throughout **STEP Online Help**.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values.

The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

See the relevant section(s) below for detailed information on working with objects in the workbench:

- Approval of Objects
- Creating Objects in Tree
- Deleting Objects in Tree
- Editing Objects in Tree

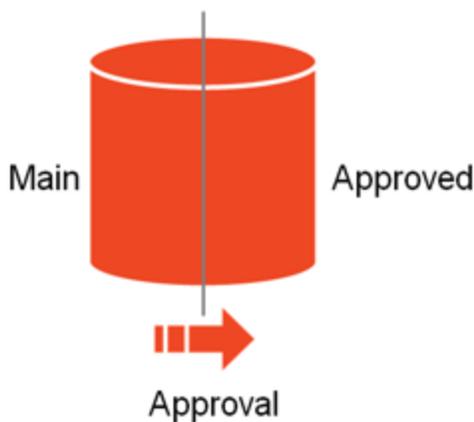
Approval of Objects

This section introduces the user to the concept of approvals in STEP, and provides detailed information on how to carry out approvals in the STEP Workbench. Approval of objects in the Web UI is handled via addition of an Approve action button to a screen.

Approval Overview

The data in STEP is logically divided into two workspaces named Main and Approved.

The Main Workspace is the editable 'draft' Workspace where data is initially born and enriched. The Approved workspace holds approved data deemed ready for production.



In a typical setup, data from the Approved workspace is made available to downstream systems. Data cannot be edited directly in the Approved workspace. Instead, data is reflected in the workspace via an operation called approval.

Approvals can be carried out manually by a user, or programmatically by a business rule, import process, or other operation.

The approval operation only applies to objects that are workspace revisable. These are:

- Product objects
- Classification objects
- Asset objects
- Entity objects configured to be workspace revisable

All other objects in STEP (like attributes, references, etc.) will be identical in the Main and Approved Workspaces and changes made to these will be reflected automatically in both workspaces. These objects are known as being 'Globally revisable'.

Detailed information on how to carry out approvals in STEP Workbench can be found in the **Approving an Object** topic in this guide. This guide also contains a detailed description of the approval symbols that are visible in the different object editors in the **Approved Symbols and Messages** topic in this guide.

Note: All actions in STEP are controlled via privileges. Some users may not have access to approve objects, or may only have options to approve specific object types, hierarchies, or attribute values. The information in the subsequent topics assumes that all required privileges are available to carry out the described actions. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User Guide** documentation.

In Use and Not In Use Objects

When an object is approved in STEP, it cannot be purged from the Tree Recycle Bin. This restriction prevents approved objects that show on the Approved Workspace from being removed erroneously. This prevention is done by way of the 'In Use' and 'Not In Use' indicators on the object records in the Tree Recycle Bin. For more information, see the **Recycle Bin for Tree** topic in this guide or the **Recycle Bin for System Setup** topic in the **System Setup / Super User Guide** documentation.

'In Use' objects cannot be individually deleted nor are they included in the Purge action. A user must perform an Approve Deletion action on each 'In Use' item.

Tree	
Light-track	
Luminaire hoist	
Mechanical accessories for luminair	
Number/text label for house numb	
Pictogram for emergency luminaire	
Pillar for bollard	
Sales Flyers	
Suppliers Root	
Support profile light-line system	
Test device for emergency power l	
(160323)	
(160324)	
(160350)	
(160363)	
12-GGK79(2)	
12-GGK79(2)a(2)	
18210 M B(2)	
18212 L B(2)	

(160350) rev.0.8 Deleted (in Use)			
Proof View	Status	State Log	Tasks
Images & Documents		Commercial	Tables
Product	Sub Products	References	Referenced By
Description			
Name	Value		
> ID	160350		No Primary Image
> Name			
> Object Type	Level 2		
> Revision	0.8 Last edited by USEI		
> Approved	✘ Last Approved on V		
> Translation	Master		
> Path	Primary Product Hierarc		
> Default InDesign template			
> CalculatedAttribute1	£ N/A-		
> Child Count	£ 0		

When an object that is not approved is deleted, it shows the 'Not In Use' indicator. This means it will be purged with the 'Empty Recycle Bin' option and can be totally removed.

The screenshot displays the STIBO SYSTEMS interface. On the left is a 'Tree' view with a sidebar containing 'Tree', 'Search', 'BG Processes', and 'System Setup'. The tree view shows a hierarchy of folders, with '12-GGK79(2)a(2)' selected. On the right is a product details panel for '12-GGK79(2)a(2) rev.0.2 Deleted (Not in Use)'. The panel has tabs for 'Tables', 'Proof View', 'Status', 'State Log', and 'Tasks'. Below these are sections for 'Referenced By', 'Images & Documents', and 'Commercial'. The main section is 'Product', with sub-sections for 'Data Containers', 'Sub Products', and 'References'. A 'Description' table is shown below, listing various attributes and their values. A 'No Primary Image' placeholder is visible on the right side of the description table.

Name	Value
ID	245318
Name	12-GGK79(2)a(2)
Object Type	Item
Revision	0.2 Last edited by L
Approved	✘ Never Been App
Translation	Not Translated
Path	Primary Product Hie
Default InDesign template	

If an object that is approved is deleted, it will still appear in the Approved workspace until an **Approve Deletion** or **Approve Deletion Recursively** action is performed.

The key difference with the System Setup Recycle Bin and the Tree Recycle Bin is that all of the System Setup objects in the Recycle Bin are flagged with 'Not In Use' since nothing in the System Setup is constrained by Approval status.

Note: When in the Approved workspace, neither recycle bin will appear.

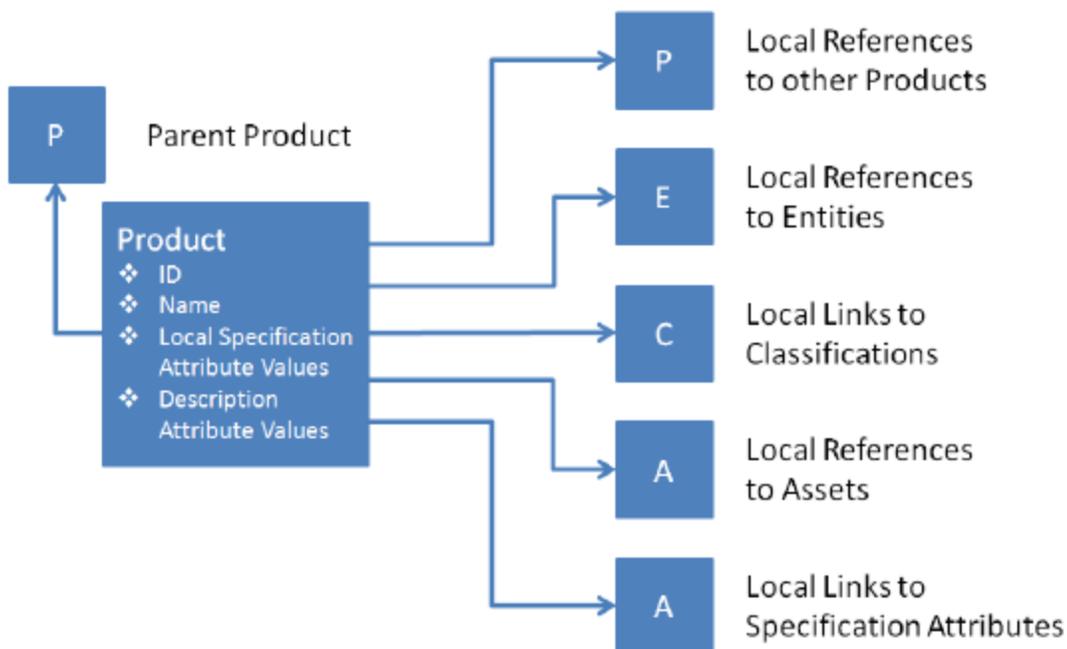
Approving an Object

This topic describes how to approve an object in the workbench. When an object is approved, it moves to the **Approved** workspace.

Data Ownership

The concept of data ownership is very important in relation to approvals. For an object to be fully approved, all data that the object owns must also be approved. When data changes, the object that owns that data is considered 'modified' and can potentially become 'unapproved.'

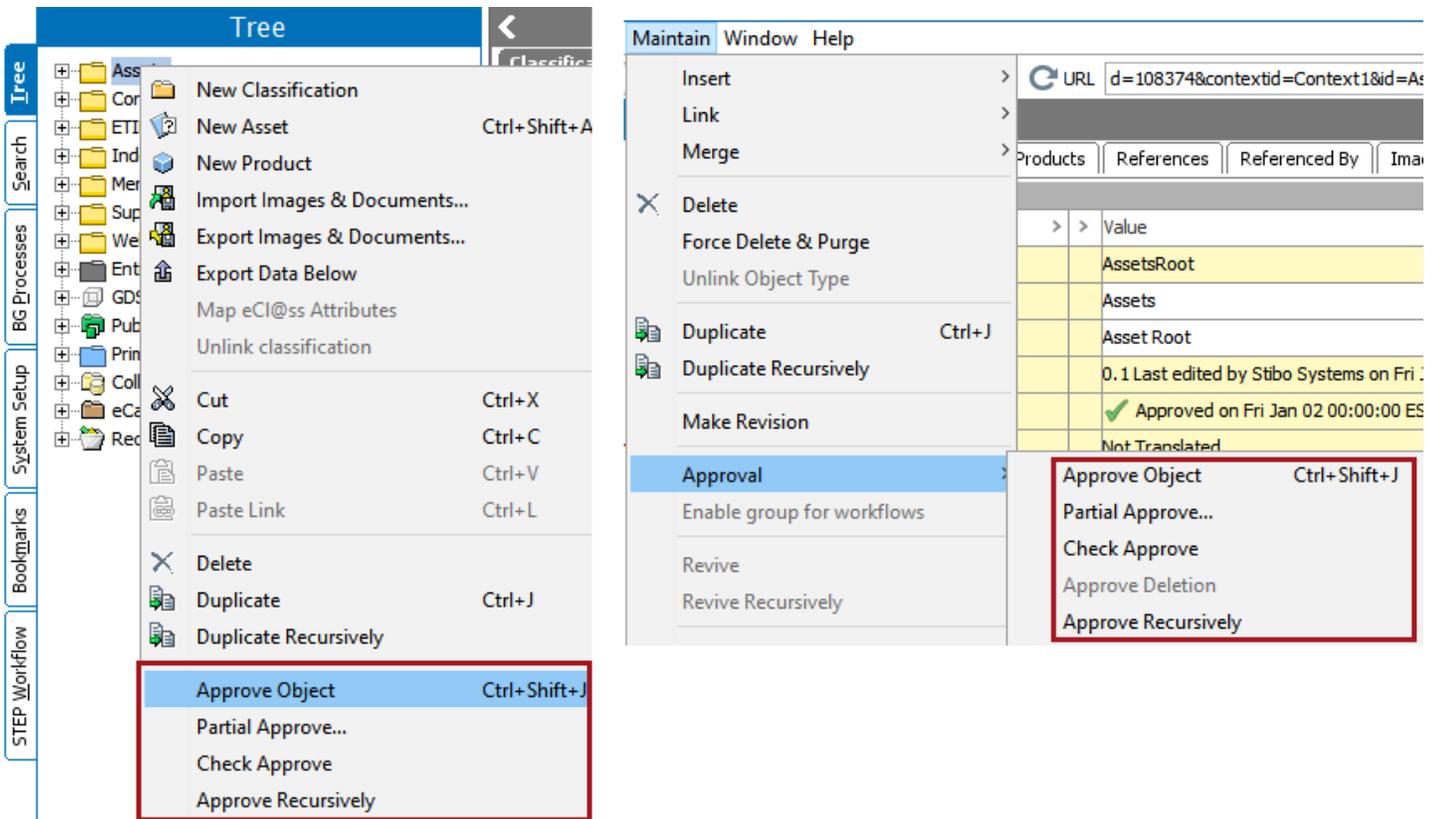
The figure below shows data owned by a Product object (the largest box).



- A Product owns its parent link (also true for Classifications, Entities and Assets).
- The Product owns local values, but not inherited Specification Attribute values. Thus, when these are modified at an ancestor level, this will not affect the Product's approval status. Also, the object's local values (that is, assigned at the product level), will be approved.
- The Product owns all local References and Links for which it is the Source. When a Link or Reference is modified, it is the Source that is changed while the Target is unaffected. Attribute values on the Reference / Link are likewise owned by the Source object.

Approve an Object

To approve an object, right-click on the object and select one of the available approval options, or use the options on the Maintain menu.



Note: If 'approval' is a task within a workflow, then objects can alternately be approved from the task view. See **Working with Tasks in Workflows** in the **Workflows** documentation.

Approve Objects is available when the **Main** workspace is selected.

Approving objects is available for:

- Classifications
- Products
- Images & Documents
- Entities (set up to be Workspace revisable)

The status of an object in the various workspaces can be viewed in the Status tab in the Workspaces field of the relevant editor.

18210 M B_EN rev.0.57 - Status											
Product	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Category Profile	Proof View	Status	State Log	Tasks
> 0.4		Fri Aug 26 11:12:09 EDT 2016	Mon Aug 29 12:06:58 EDT 2016						USER4		Auto Generated
> 0.3		Fri Aug 19 14:13:58 EDT 2016	Fri Aug 19 14:13:58 EDT 2016						USERE		Auto Generated
> 0.2		Tue Aug 02 09:15:20 EDT 2016	Tue Aug 02 09:15:44 EDT 2016						USER6		Auto Generated
> 0.1		Fri Feb 13 11:36:39 EST 2015	Fri Feb 13 11:36:39 EST 2015						STEPSYS		
Workspaces											
ID	Name	Path									
> Main	Main	Main		0.57							
> Approved	Approved	Approved		0.53							
> Verification	Verification	Verification		0.49							

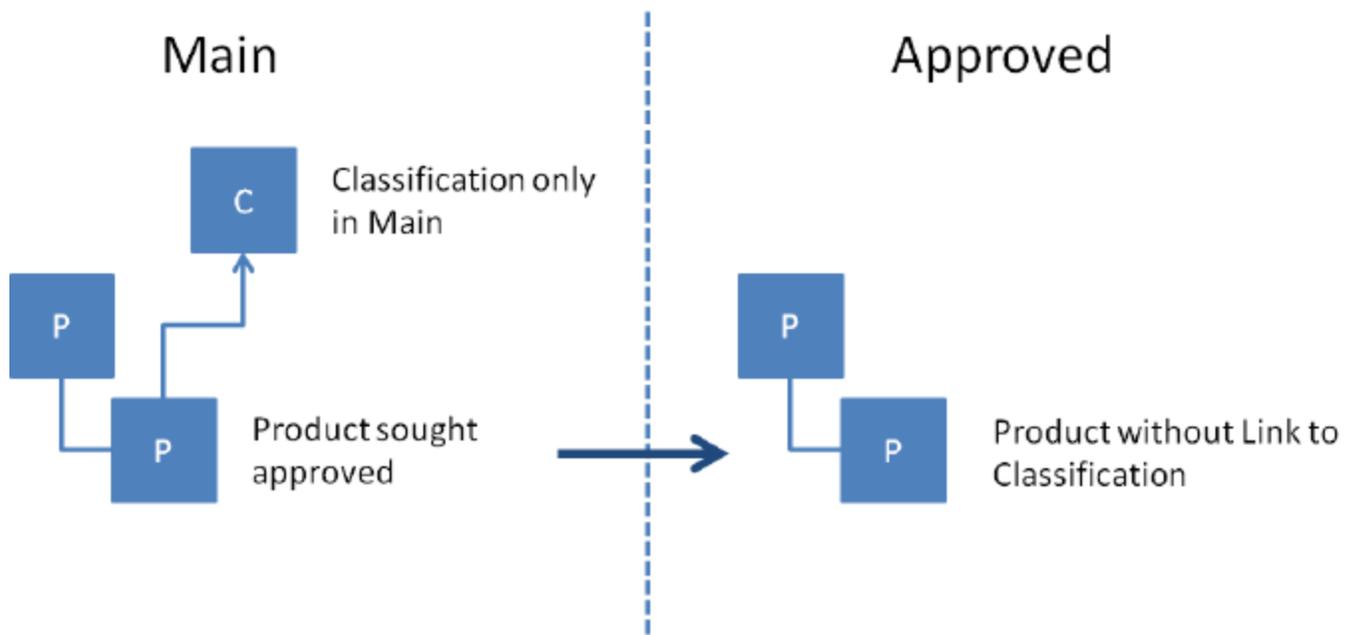
Once object editing is complete, and the object is ready for publishing, approving the object copies the current object values into the Approved workspace.

Conditions to approve an object

- Objects must be approved from the **Main** workspace.
- An object cannot be approved if parent objects are not yet approved (approving must be done from the top down in the hierarchy).
- A Reference or Link cannot be approved if the Target does not exist in the Approved Workspace, i.e., if a Product / Classification is referenced with another Product / Asset / Classification, then the referenced Product / Asset / Classification needs to be approved first before the actual Product / Classification is approved.
- If Attributes or References / Links are Mandatory, objects cannot be approved if there are no values / targets.
- Externally Maintained Attributes or References / Links are not under revision control. Values / references will automatically be reflected in the Approved Workspace and modifying the data will not affect object's approval status.
- The user must have sufficient Approve privileges.
- To easily check differences in the Main and Approved Workspaces, select **Partial Approve**, as discussed below.
- When approving, the object's revision number changes automatically.
- An entire hierarchy can be approved using the **Approve Recursively** option. For more information, see **Approving Recursively** below.

Partial Approve

It is possible to approve an object that has a Reference / Link to another object that does not exist in the Approved Workspace. In this instance, the object will become "partially approved", meaning that the object and all data that can be approved will be approved. However, the Reference / Link will not be approved. If the Target for the Reference / Link is later approved, the Source will need to be approved again for the Reference Link to be updated in the Approved Workspace.



Partial approvals can also be performed deliberately - both manually and programmatically. Specific Attributes, References, Links, and the object Name can be selected for approval. The Attributes, References, Links and Names are sometimes referred to as “part objects”. These part objects cannot exist in the Approved Workspace without the object to which they belong. Thus, when the first part object is approved, the object will need to be present in the Approved Workspace.

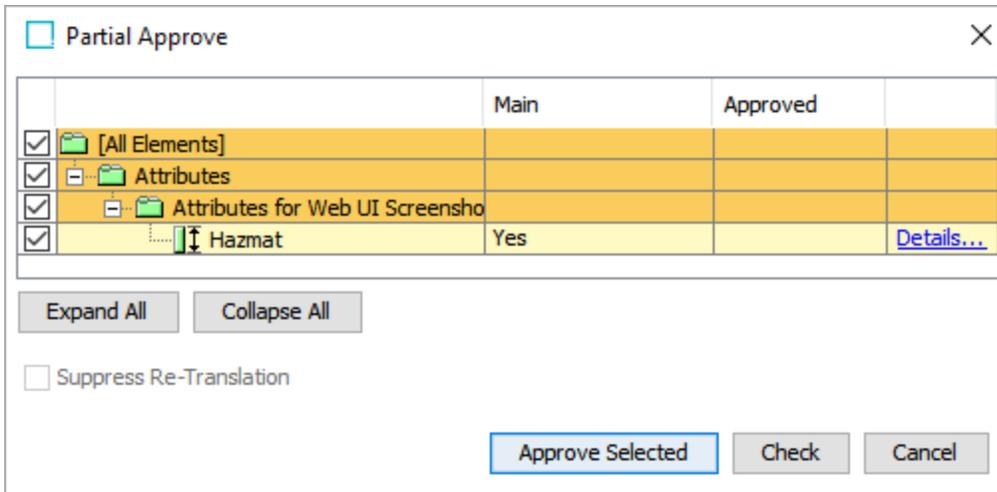
Usage

Partial approval of selected elements of the object is particularly helpful in situations where certain elements of the object need to be available for usage (in the Approved Workspace) before the rest of the object or its elements can be approved.

For example, consider that there are two users who perform changes for a product and then approve the product. If the product is completely approved, then it can be difficult to identify which user performed specific changes. In this case, using the Partial Approve will allow the user to approve the changes performed only by him / her and leave the rest of the changes to be approved by the other user who made those changes.

Approve partially

1. In the Tree, select the object you wish to partially approve.
2. In the Maintain menu, click **Approval > Partial Approve**. Optionally, right-click the selected object and click **Partial Approve**.
3. This will bring up the Partial Approve dialog box:



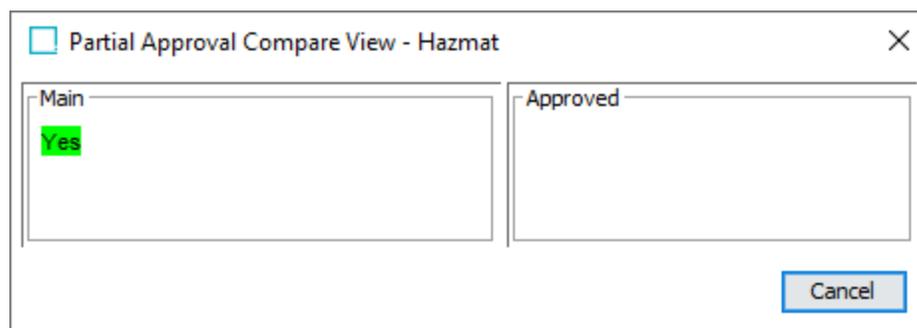
4. The user has to select the required element / elements (for example, attributes) and click on 'Approve Selected' button.

Partial Approve Compare View Dialog

The dialog shows which elements of the selected object have been changed since the last approval of the object.

Besides Name, Parent Object, and Default DTP Template, the type of elements listed are attributes, references, and tables. For each element the values in **Main** and **Approved** Workspaces are listed.

For detailed information about the value for an element, click the **Details...** link. This displays a detailed view of the element showing the values for the **Main** and **Approved** workspace:



In the above example, the value for the attribute Brand Name has changed. Values only present in Main workspace are marked with a green background color. Values only present in Approve workspace are marked with a red background color.

Note: The detailed view differs slightly depending on the element type selected.

All elements are selected as default. To deselect all elements, click the checkbox next to the All Elements node.

You can select the element(s) you wish to approve by clicking the check boxes next to each element. You can also select a whole element group, i.e., **Attributes** by clicking the checkbox next to the element group.

To expand an element group click the + sign next to the element group. To collapse the element group, click the - sign next to the element group. To expand all elements in the dialog, click the **Expand All** button. To collapse all elements in the dialog, click the **Collapse All** button. To check if the selected elements can be successfully approved, click the **Check** button. An Approve report will subsequently summarize the result of the check.

This functionality is also available in the Web UI. For more information on this feature, see the **Partial Approval in Web UI** topic in the Web User Interfaces / Web UI Getting Started documentation.

Clicking the **Approve Selected** button will approve the selected elements of the object and the **Approve** status of the object will change accordingly. Normal **Privilege** rules apply to **Partial Approve**. For more information, see **Action Sets**.

Suppress Re-translation

Normally, an approval of a translated Product in a source language will cause the **Translation** status of the Product to be set to **Re-translation needed**. In the Partial Approval dialog this behavior can be suppressed by clicking the **Suppress Re-translation** checkbox. All existing translation relations with status 'Up to Date' will remain in status 'Up to Date'. This is especially used in cases where only minor changes are approved and no re-translation is needed. For more information, see the **Translations** documentation.

Note: To get a list of language variations of the object that potentially will be affected by the approval, place the cursor on the **Suppress Re-translation** label.

Check Approve

If you are unsure whether or not you are allowed to completely approve an Object, you can run a **Check Approve**.

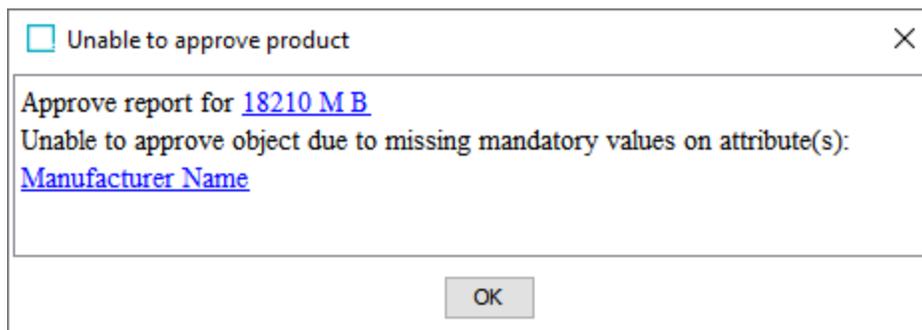
1. In the Tree, click the Object to be approved.

The Editor shows the Object contents in **Main** and **Approved** Workspaces.

2. In the **Maintain** menu, click **Approval > Check Approve**, or right-click on the object, and then select **Check Approve** option.
 - If you only have changed attribute values for which you have the Approve privileges, a **Complete Approval Possible** dialog box appears.



- If the product cannot be approved due to multiple reasons, such as Mandatory values / References being empty, then the report will provide details about the missing information, as shown below:



Note: If you have changed attribute values for which you do not have the Approve privileges the Approval options are unavailable.

For example, consider a Product that has multiple attributes linked and has mandatory values and references which needs to be approved after the changes have been done. In this case, scrolling down or switching between tabs to check if the values are entered is time consuming; Check Approve will help the user to know if the product can be approved completely with a detailed report.

Approve Recursively

Approving recursively is done from the **Main** menu by clicking **Approve Recursively**. Similarly, the Approve Recursively can be done by right-clicking on the object.

Approving Recursively is available when a **Main** Workspace is selected.

Approving Recursively is available for:

- Classifications
- Products
- Images & Documents
- Entities (setup to be workspace revisable)

The status of an Object in the various Workspaces can be viewed in the **History** tab in the Workspaces field of the relevant Editor.

Approving Objects recursively means searching for unapproved Objects linked to (or below) a selected hierarchy node, and approving these Objects (copying them to the **Approved** Workspace).

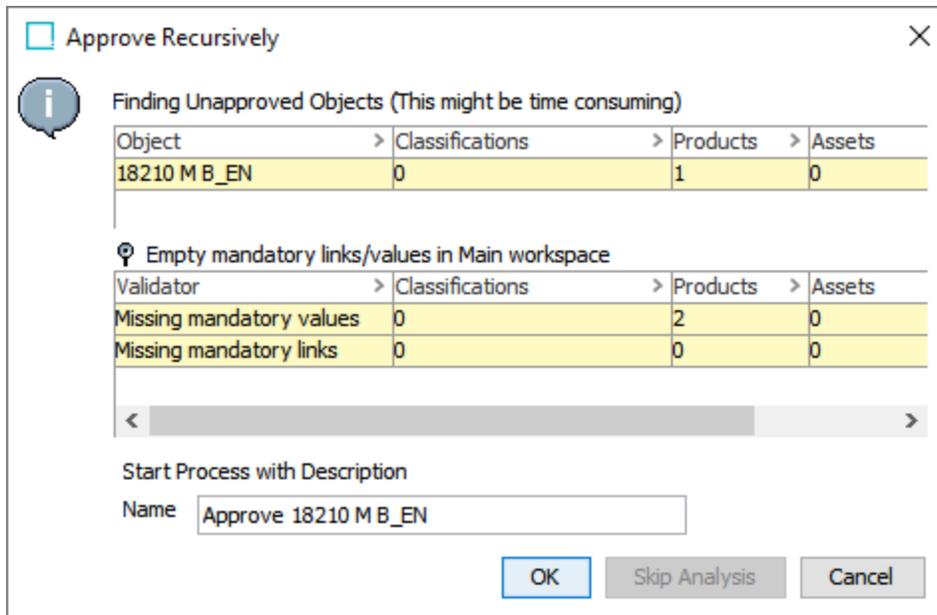
This is useful and time saving e.g., when a lot of images have been imported and checked and should all be approved.

To recursively approve in the 'Main' Workspace:

1. In the Tree, select the hierarchy containing the Objects to be approved.
2. In the **Maintain** menu, click **Approval > Approve Recursively**.

A dialog box appears, listing the Name of the selected hierarchy node, contained Objects and status of analysis.

Note: Approve Recursively automatically performs a search for unapproved Objects. You can click the **Skip Analysis** button if this is not needed.



Approve Recursively

i Finding Unapproved Objects (This might be time consuming)

Object	Classifications	Products	Assets
18210 M B_EN	0	1	0

🔍 Empty mandatory links/values in Main workspace

Validator	Classifications	Products	Assets
Missing mandatory values	0	2	0
Missing mandatory links	0	0	0

Start Process with Description

Name

3. Optionally, type a name for the process.
4. Click **OK** button to start the approve process.

A dialog box appears displaying information on the process.

5. Click **Go to process** button.

The Process view opens, showing details of the process and a report of approved Objects.

The hierarchy will now have Approved status indicating that it is copied in the **Approved** Workspace.

Approval Feedback

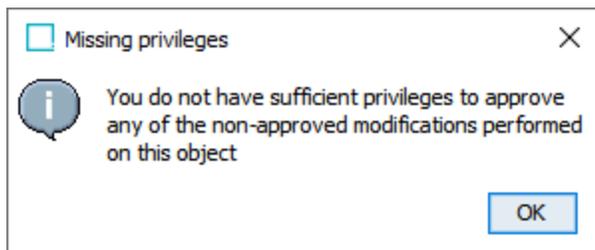
When clicking **Approve Object** or **Partial Approve**, you might get different types of warnings, depending on your Approve Privileges.

Approve Object Feedback

If you have modified attribute values for which you have **Approve Privileges** and at the same time have modified attribute values for which you *do not* have **Approve Privileges**, an **Unable to Approve the Entire Object** dialog appears.



If you have modified attributes values and do not have **Approve Privileges**, then the option 'Approve' is disabled in the right-click menu. If you have modified attributes values for which you *do not* have **Approve Privileges**, a **Missing privileges** dialog appears.



For more information about user privileges, see the **User Actions** topic in the **System Setup / Super User Guide** documentation.

Partial Approve Feedback

If you have modified attribute values for which you have **Approve Privileges**, and at the same time you have modified attribute values for which you *do not* have **Approve Privileges**, a **Partial Approve** dialog box appears.

Partial Approve
✕

		Main	Approved	
<input checked="" type="checkbox"/>	[All Elements]			
<input checked="" type="checkbox"/>	[-] Attributes			
<input checked="" type="checkbox"/>	[+] Category Specific Attributes			
<input checked="" type="checkbox"/>	[-] Display			
<input checked="" type="checkbox"/>	[-] Manual Sequencing Display			
<input checked="" type="checkbox"/>	Short Item Description	T-shirt, short sleeve, Mens M,	T-shirt, short sleeve, Mens M,	Details...

Expand All Collapse All

Suppress Re-Translation

Approve Selected
Check
Cancel

In the example above, the user will be able to approve all attribute values in Attribute Group **Manual Sequence** and Category Specific Attributes. All attributes users do not have permissions for will not be displayed.

Approve Recursively feedback

1. In BG Processes, click **Approve Recursively**, open **Active** or **Ended Processes**, click the relevant process.
2. In the **Background Process** tab, open **Execution Report**.

📌 Execution Report

- 1 Recursive approval started on '235915' in context 'English US'
- 2 Approved 0 classifications; 1 products; 0 assets; 0 entities..
- 3 Recursive approval of 1 objects done. 0 warnings and 0 errors.

If there are any errors, the report will provide details about the error. If the process or approval was successful, then the report will show 0 errors and 0 warnings.

The following example shows a missing mandatory attribute value, which caused the object to not approve.

Execution Report

- 1 Recursive approval started on '235915' in context 'English US'
- 2 Approved 0 classifications; 1 products; 0 assets; 0 entities.; 1 errors
- 3 Approve error report for [235915-2](#)
- ! 4 Unable to approve object due to missing mandatory values on attribute(s): step://attribute?id=Target_Attribute
- 5 Recursive approval of 1 objects done. 0 warnings and 1 errors.

⏪ ⏴ 1-5 of 5 ⏵ ⏩ Save... Truncate

Approve Recursively dialog

Approve Recursively ✕

Finding Unapproved Objects (This might be time consuming)

Object	Classifications	Products	Assets
18210 M B_EN	0	1	0

Empty mandatory links/values in Main workspace

Validator	Classifications	Products	Assets
Missing mandatory values	0	2	0
Missing mandatory links	0	0	0

Start Process with Description

Name

OK
Skip Analysis
Cancel

There are multiple options which are explained below:

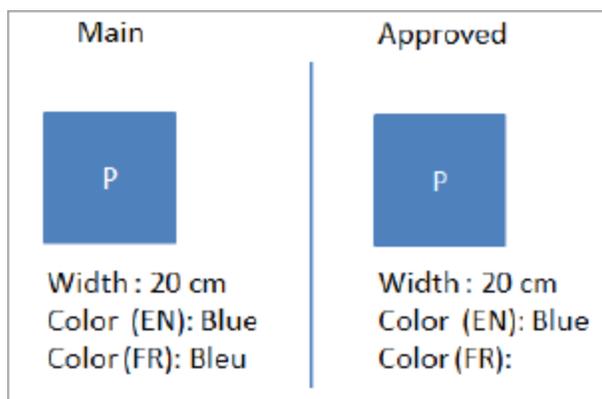
- Finding Unapproved Objects: This will analyze the hierarchy and then provide the count of the number of Products / Classifications / Assets / Entities which are currently in unapproved status.
- Empty Mandatory Links / values in Main Workspace: This provides the details about the number of mandatory links / references that are missing for the Products / Classifications / Assets / Entities.
- Start Process with Description: This option is used to enter the name for the Process before starting the background process. This option is not mandatory but is recommended as entering an identifiable name can be useful for review purposes.
- Skip Analysis: This option can be used in cases where the number of child products is large. The analysis of the number of unapproved or missing mandatory values / References can be time consuming but will provide the detailed report. By clicking this option, the analysis will stop and the user can proceed with the approving recursively.

For example, consider there are hundreds of products in a particular parent hierarchy. Selecting each product, one at a time, and then approving them would be time intensive. In these cases, approving recursively will help a user to approve all the products at one time.

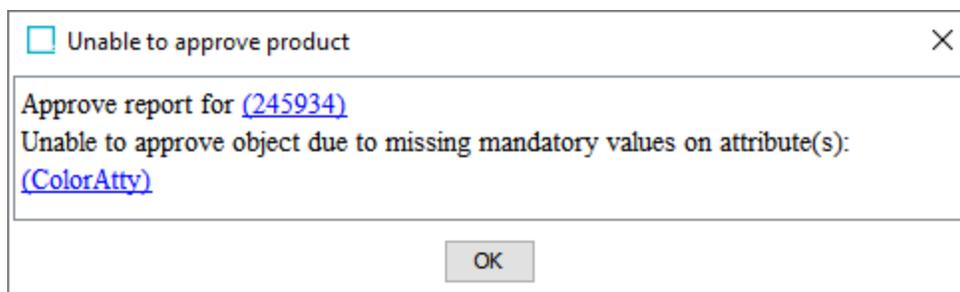
Context Dependent Approvals

When an object is approved, that approval always happens in a specific context and will only be applicable to data visible in that context.

To illustrate this concept, see the figure below in which object 'P' has values for two different attributes, **Color** and **Width**, in the Main workspace. While **Width** is not dimension dependent, **Color** is, and has different values in two contexts: 'Blue' in the English context and 'Bleu' in the French context. If the object is approved in the English context, only the data visible in the English context will be reflected in the Approved Workspace. Because of this separated approval, the object must also be approved in the French context to have it become completely approved, indicated by a green checkmark in the approval status field. Until this approval across contexts is done, the object in the English context will have the status 'Approved in Current Context on [date + time]', indicated by a yellow checkmark, and the object in the French context will have the status of 'Last Approved on [date + time]' (red X).

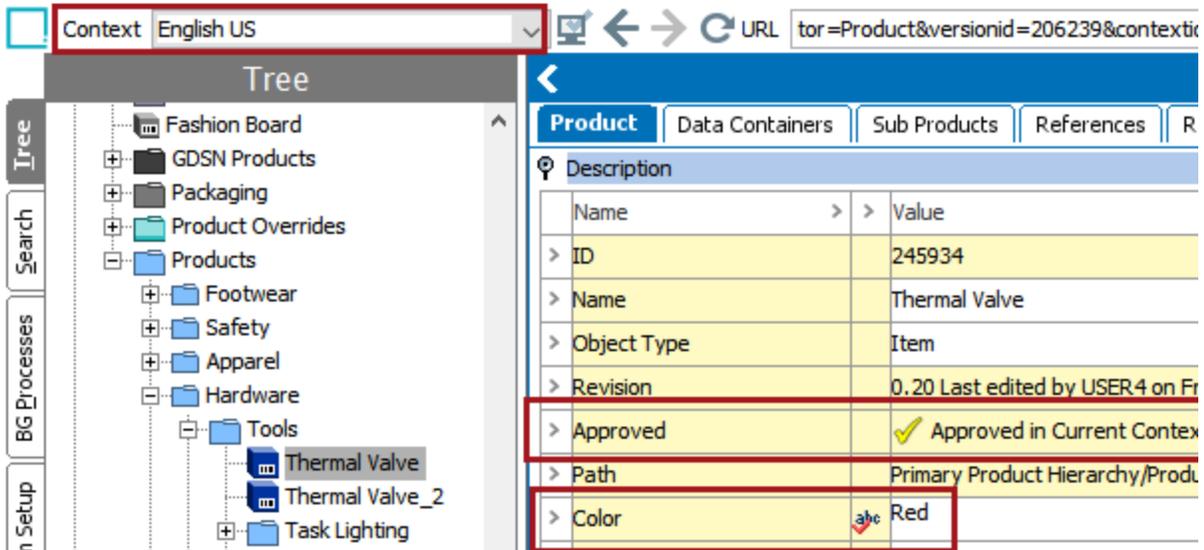


If **Color** is set as a mandatory attribute in the French context but is left empty, then an empty mandatory attribute warning will display when attempting to approve the object in the French context.

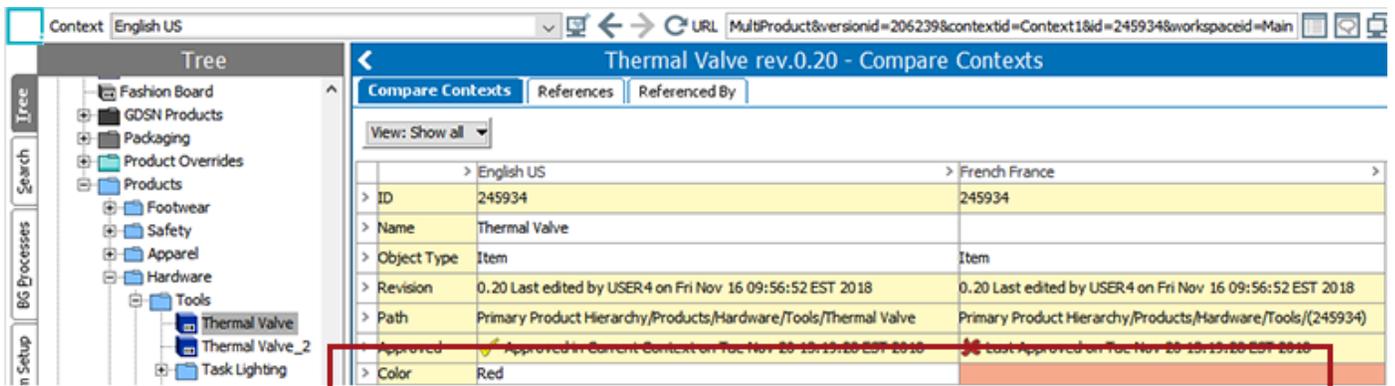


All mandatory attributes will be checked upon approval to ensure none are empty in the context in which the object is being approved. For example, in the first of the images shown below, the value added for the

mandatory attribute 'Color' in the English context is 'Red'. The object can be approved in this context without any issue. Note, however, that the approval icon is for the current context only (English), hence the partial approval notation.



When the viewing mode is switched from Normal to Context, the empty mandatory attribute alert is shown in the French context.



When changes are made to both contexts and approved on both contexts, the object is fully approved, garnering a green checkmark in both contexts.

	> English US	> French FR
> ID	245934	245934
> Name	Thermal Valve	
> Object Type	Item	Item
> Revision	0.24 Last edited by USERE on Tue Nov 20 15:39:31 EST 2018	0.24 Last edited by USERE on Tue Nov 20 15:39:31 EST 2018
> Path	Primary Product Hierarchy/Products/Hardware/Tools/Thermal Valve	Primary Product Hierarchy/Products/Hardware/Tools/(245934)
> Approved	✓ Approved on Tue Nov 20 15:39:31 EST 2018	✓ Approved on Tue Nov 20 15:39:31 EST 2018
> Color	Red	Green

If a change is made in one context, e.g., changing the Color attribute value in the French context to 'Blue,' but leaving the value for the Color attribute in the English context as 'Red,' then the object will regain full approval once the object is approved in the French context.

Approved Symbols and Messages

An object can contain both workspace revisable data and globally revisable data. The Approved symbols and messages indicate the status of the workspace revisable data on a product, classification, image, or document. The status can be viewed in the Approved field on these objects.

For details on the approval process, see the **Approving an Object** topic.

For more information on revisability, see the **Revisions** topic in the **System Setup / Super User** guide.

Approved Status Symbols

Approved Symbols	Status	Description
	Unapproved	<p>Revised data on product, classification, or images & documents in current context is not approved.</p> <p>For example:</p> <ul style="list-style-type: none"> • An object has never been approved. • Revised data has been changed in current context without being approved. Revised data includes attribute values, references, object names, or tables. <p>Examples of changes to revised data include:</p> <ul style="list-style-type: none"> • A change in object name. • A changed value on an internally maintained attribute. • If an attribute has been linked to a product. • If reference links to objects have been made. <p>Note: When linking a product to classification and in case the classification object type owns the product links, then the product does not get the Unapproved symbol. For more information, see the Object Types and Structures topic in the System Setup / Super User guide.</p>
	Approved	<p>Revised data on product, classification, or images & documents is approved in all contexts.</p> <p>Note: No data in any context needs to be approved.</p>

Approved Symbols	Status	Description
	Partial Approved	<p>Revised data has been approved in current context but a reference, object name, or value needs to be approved for the object to be approved in all contexts.</p> <p>If you view another context, then you typically see that:</p> <ul style="list-style-type: none"> • A dimension dependent reference is not approved. • A dimension dependent value is not approved. • A dimension dependent object name is not approved. <p>When all the dimension dependent references, attribute values, and object names have been approved, the symbol changes from yellow Partial Approved symbol to a green Approved symbol.</p>

Approved Status Messages

Messages are displayed for workspace revisable data as follows.

Unapproved

When an object is newly created and never been approved as shown below:

Name	Value
ID	235915
Name	235915-2
Object Type	Active Products
Revision	0.1 Last edited by USERE on Thu Oct 12 12:04:10 EDT 2017
Approved	 Never Been Approved

When an object attribute / reference is modified, the status will show as 'Last Approved on' along with the date and time as shown below:

Name	Value
ID	235915
Name	235915-2
Object Type	Active Products
Revision	0.3 Last edited by USERE on Thu Oct 12 12:09:07 EDT 2017
Approved	 Last Approved on Thu Oct 12 12:09:03 EDT 2017

Approved

When an object is approved in all contexts the status displays as shown below:

Name >	Value >
> ID	235915
> Name	235915-2
> Object Type	Item
> Revision	0.31 Last edited by USER4 on Mon Jan 07 17:56:10 EST 2019
> Approved	✔ Approved on Mon Jan 07 17:56:10 EST 2019

Partially approved

When an object is approved in only some contexts the status displays as shown below:

Name >	Value >
> ID	235915
> Name	235915-2
> Object Type	Active Products
> Revision	0.5 Last edited by USERE on Thu Oct 12 12:13:20 EDT 2017
> Approved	✔ Approved in Current Context on Thu Oct 12 12:15:13 EDT 2017

Creating Objects in Tree

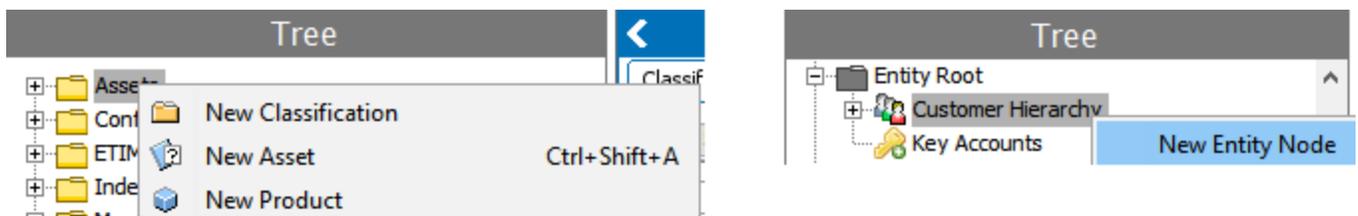
Regardless of the particular object type or hierarchy that you are working with, the general principles of creating objects in the workbench are the same, and are described below. Tree icons are set during object type creation according to preference and may be different in your system.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

Objects can be manually created in the Tree via right-clicking or using the Maintain menu.

Create a new object via right-click

1. Select a parent under which the new object should be created. Note that if the new object should be created as a root node on the Tree tab, the Maintain menu must be used (see below).
2. Right-click on the parent and select the appropriate 'New...' option. The options will vary based on the selected parent. For example, note the differences between the available options on a classification and an entity, as shown below.



3. Selecting the right-click option will open a Create dialog, appropriate for the selected object super type (e.g., Create Assets for assets and Create Entity for entities). The options available in the dialog are based on the data model defined in System Setup. For example, the Object Type selection will vary based on the allowable object types under the selected parent, and ID will only be available for population if the object type being created does not have autogenerated IDs applied.

Create Asset

Object Type

- Assets
- Auto Classification Rule Set
- Bulk Update Configuration

ID

Name

Create Entity

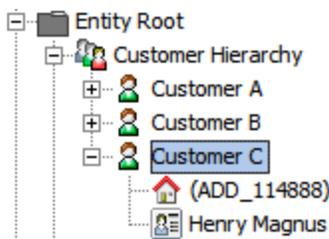
Object Type

Customer

ID

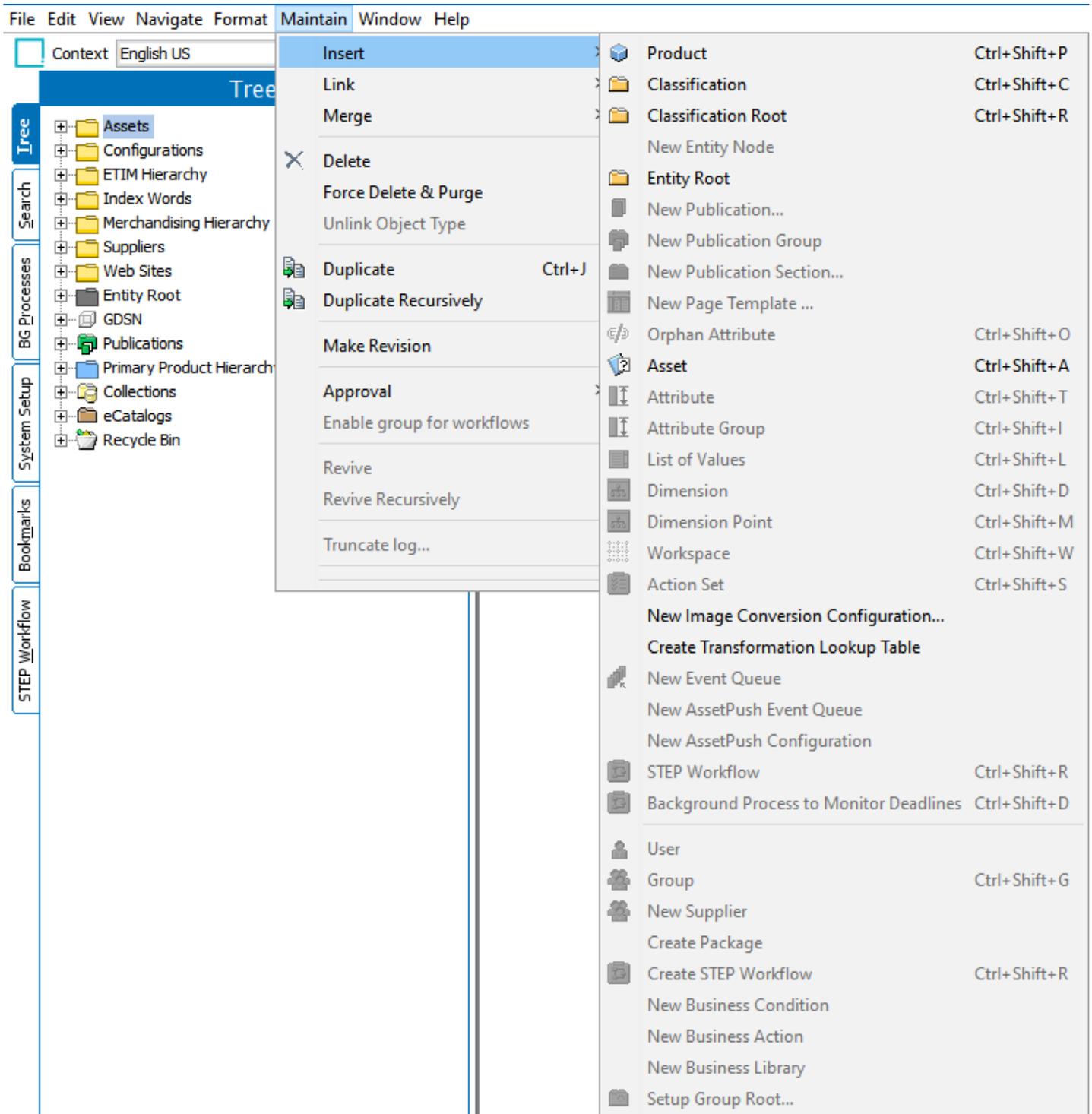
Name

4. When an object type has been selected and an ID applied, the Create button will be enabled. Clicking Create completes the creation of the new object, which is then accessible in the Tree. If a Name is not supplied, the object will display in the Tree by the ID in parentheses. If a Name is supplied upon creation, the object will display in the Tree using the Name entry. For example, two new objects have been added under Customer C in the screenshot below. The first did not have a Name supplied, while the second did.



Create a new object via the Maintain menu

From the menu in the upper left corner of the workbench, select Maintain > Insert and choose the appropriate option. Note that it is required to use this method when adding a new root node to Tree. Additionally, note that the available options differ based on the active selection when the menu is accessed. For example, the below shows the available insert options when a classification has been selected, whereas the publication-related options would be enabled if a publication object had been selected instead.



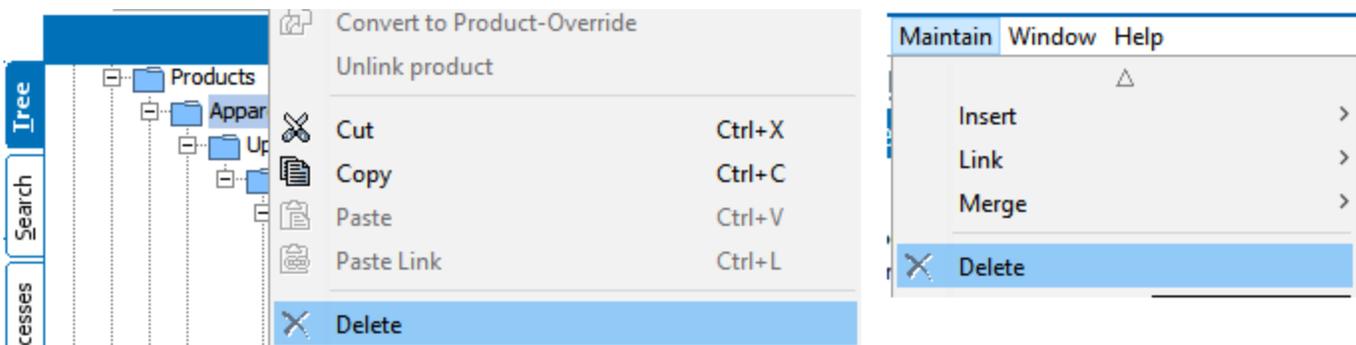
Many of the available options will only be enabled when an appropriate selection has been made on the System Setup tab. For example, an attribute group must be selected for the Attribute or Attribute Group options to be enabled.

Deleting Objects in Tree

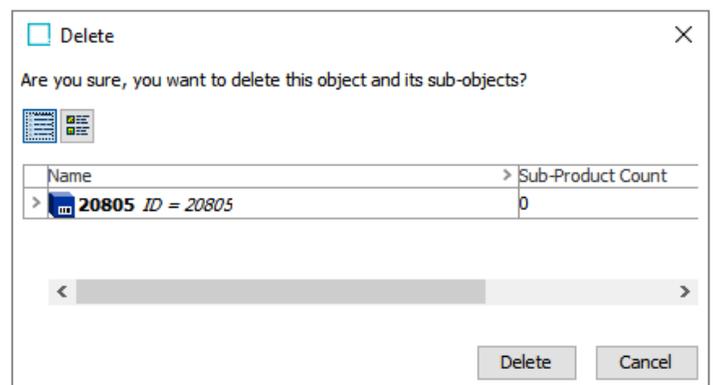
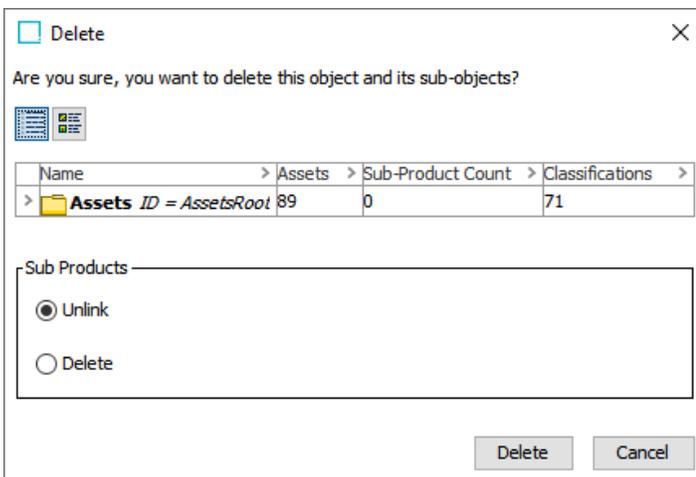
Regardless of the particular object type or hierarchy that you are working with, the general principles of deleting objects in the workbench are the same, and are described below.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

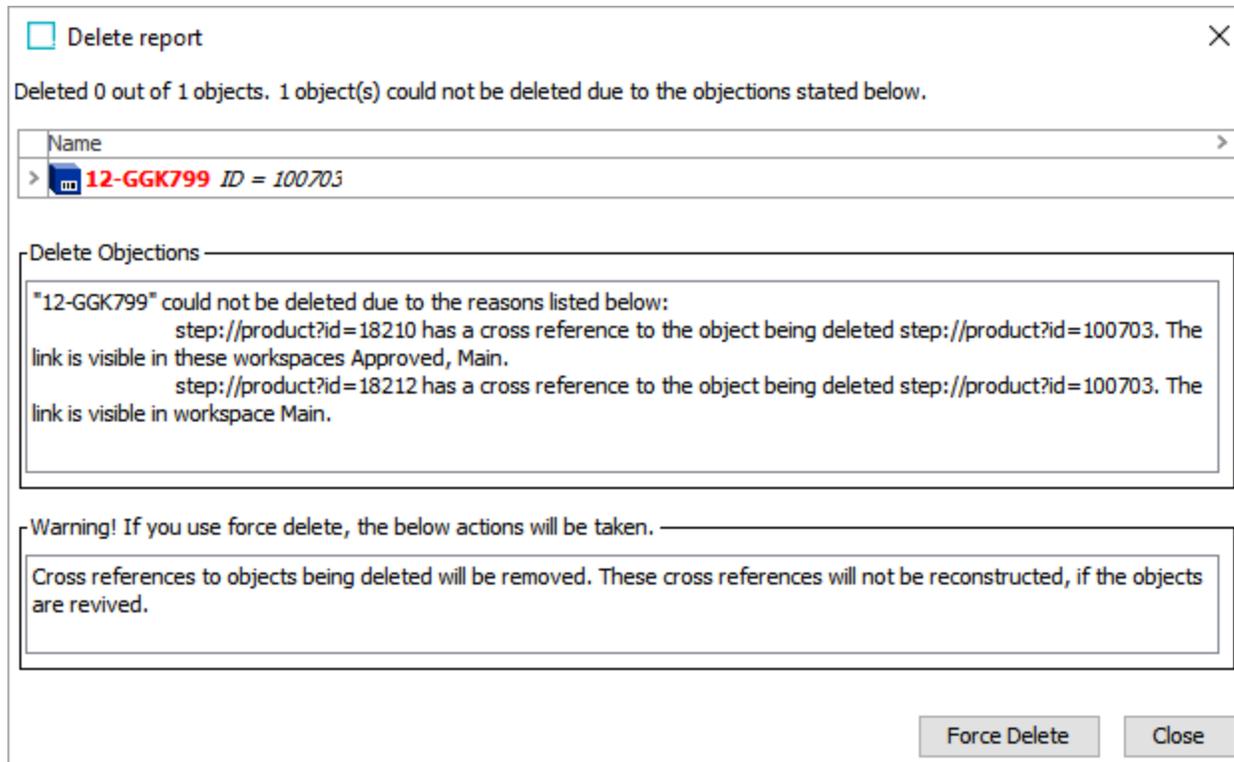
Objects can be deleted from the Tree by right-clicking on the object to be deleted, or via the Maintain menu when the object to be deleted has been selected. In both cases, the Delete option is selected from the menu, and deletion of multiple objects is supported using Ctrl or Command to multiselect.



Selecting Delete will open a deletion confirmation window, which will vary slightly based on the object selected for deletion. For example, a classification provides an option to unlink child products rather than delete them, while deletion of a product will automatically delete all child objects.

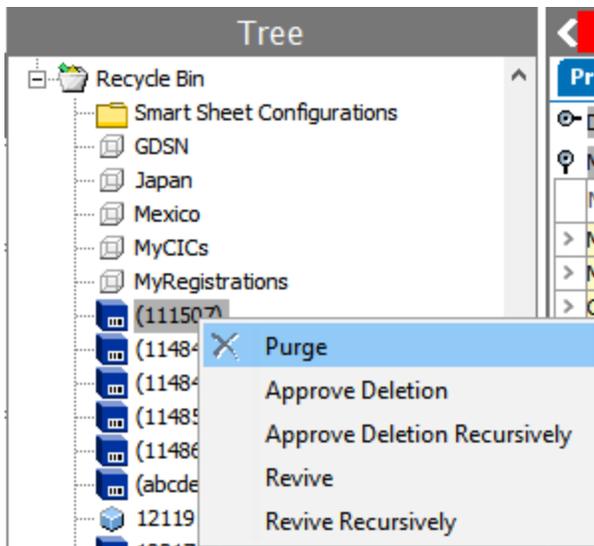


Clicking Delete will attempt to delete the selected object (and delete or unlink child objects as appropriate). A confirmation window will appear detailing success or failure. Note that in order to delete an object, a number of conditions must be met. For example, the object must not be referenced by any other object and must not be active in any workflow. If the deletion conditions are not met, the confirmation window will display the errors, which must be corrected prior to deletion of the object.



In some cases, a Force Delete option is available, though it is recommended to correct the data whenever possible rather than forcing deletion. Also note that updates may need to be approved in order to take effect. For example, if an object has been referenced by another and that reference has been approved, removing the reference must also be approved (by approving the change on the referencing object) to resolve the deletion objection.

Once an object has been deleted, it is visible in the Recycle Bin for Tree, from where it can be revived if needed. In order to fully delete the object, the deletion must be approved and the object purged. Following a purge, the object cannot be revived.



For more information on the Recycle Bin for Tree and the available actions, see the **Recycle Bin for Tree** topic within this guide.

Alternatively, an object can be deleted and purged in one go using the 'Force Delete & Purge' option in the Maintain menu. Choosing this option will bypass the Recycle Bin and is equivalent to completing a deletion and purge all in one action. However, this option does NOT cause an approve deletion event in the system, so if deletion events need to be recorded for output to downstream systems, this option should *not* be used.

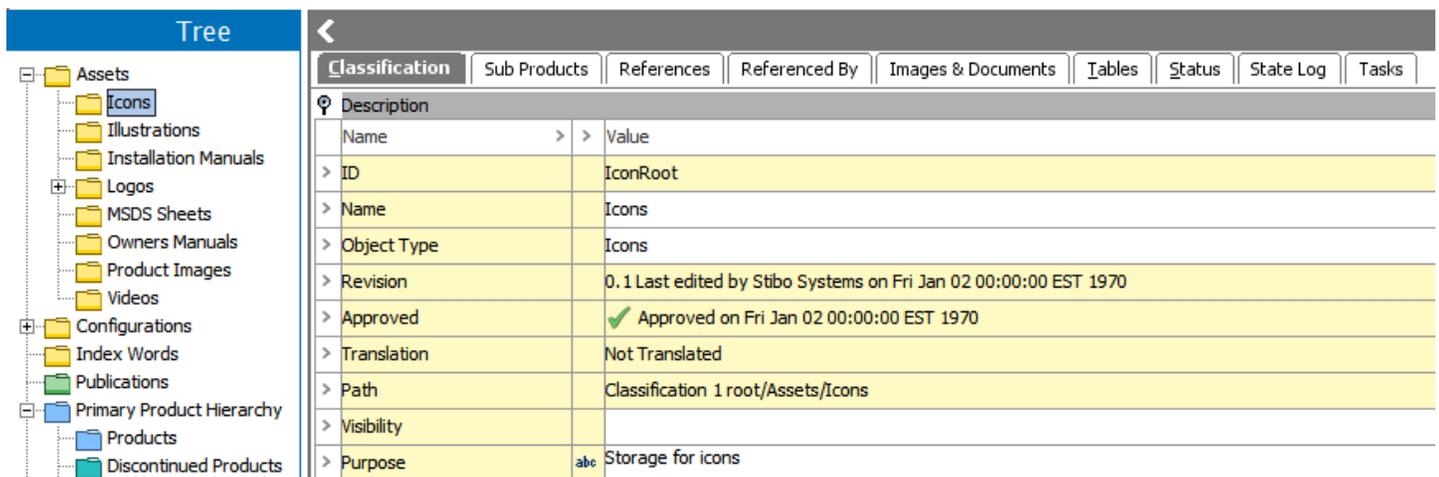
Editing Objects in Tree

Objects can be easily edited within Tree, and general principles for editing are the same, regardless of the type of object. The available tabs will vary based on the object type selected, as well as other considerations such as data model and licenses. Some tabs are common across the various object super types, while others appear only on specific object types or subsets of object types. Additionally, some editors appear on more than one super type, but have differing functionality based on the type of object that has been selected.

This topic covers the editing functionality available across the various editors, and provides links to additional information for working with specific object types.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

When an object is selected, the main portion of the screen displays a corresponding editor. The main editor for the object is the first tab, which is Classification in the below example.



Classification		Sub Products	References	Referenced By	Images & Documents	Tables	Status	State Log	Tasks
Description									
Name	>	Value							
ID	>	IconRoot							
Name	>	Icons							
Object Type	>	Icons							
Revision	>	0.1 Last edited by Stibo Systems on Fri Jan 02 00:00:00 EST 1970							
Approved	>	✓ Approved on Fri Jan 02 00:00:00 EST 1970							
Translation	>	Not Translated							
Path	>	Classification 1 root/Assets/Icons							
Visibility	>								
Purpose	>	abc	Storage for icons						

All objects will have an **ID**, **Name**, **Object Type**, **Revision**, and **Path** field. Objects that are subject to approval (known as 'workspace revisable') will also have an **Approved** field. **ID** cannot be changed once an object has been created, so the field appears yellow, meaning it is not editable. **Revision** and **Approved** data is auto-populated by the system, so these fields are also not editable. Conversely, object **Name** and **Object Type** can be edited (assuming the user has privileges to do so), so those fields appear white.

Note: Any number of attributes may be added to objects under the Description flipper. However, not all data shown in the Description section is an editable attribute. Fields such as ID, Revision, Approved, Translation, and Path are *aspects* of the object (not attributes), and are not editable. Name and Object Type are also aspects of the object, though these may be edited.

Some object types only support Description attributes, meaning all object data is accessed under the **Description** flipper. For object types that support Specification attributes, data is organized by attribute group, and clicking the magnification icon (indicated by a 1 in the screenshot below) will collapse or expand each group, allowing users to focus on the relevant data. All attributes have a validation base type applied that determines the allowable data that can be entered, and is indicated by the icon to the right of the attribute name below (2). Detailed information on attribute validations is available in the **Validation Rules** topic in the **System Setup / Super User** guide.

To edit data, click in any editable field. Text attributes can be edited by typing directly into the field, while LOV attributes will provide a dropdown from which users can select a value, as shown below (3).

The screenshot displays the STIBO SYSTEMS interface. On the left is a 'Tree' view showing a hierarchy: Products > Apparel > Upper Body Wear > T-shirts > T-shirts Items > 12-GGK799. The main area shows the 'Product' details for '12-GGK799'. The 'Description' section is expanded, showing 'Manufacturer Information' and 'Category Specific Attributes'. A magnification icon (1) is next to the 'Description' section. A validation icon (2) is next to the 'Material' attribute. A dropdown menu (3) is open for the 'T-shirt Size' attribute, showing options from 'XS' to 'XXXL'.

Pressing the tab key shifts the focus to the next cell and Shift+Tab shifts the focus to the previous cell. Alt + F2 opens the Rich Text Editor, allowing the user to access styling options. For a complete list of shortcuts, see the **STEP Workbench Keyboard Shortcuts** topic within this guide. The data fields available for editing will depend entirely on the data model and will vary for each implementation.

Note: Data edited in the workbench is auto-saved, with the change / save being applied as soon as the user exits any field. Therefore, no explicit save action is ever required by the user.

If an object is being edited that is workspace revisable (e.g., subject to approval), editing the object will change the approval status (if the object had been previously approved). See the **Approval of Objects** topic within this guide for more information on approvals.

Multi-Editors

Objects can be multi-selected for editing using Ctrl + click, or by Shift + Down / Up arrow keys. Additionally, objects of the products and classification super types have a Sub Products tab that can be used for multi-editing. Functionality for editing objects is comparable, regardless of how the multi-editor interface is accessed.

Right-clicking in any row *header* will expose the **Rotate Table** option which can be used to access the preferred orientation of the data (Pressing F11 will also rotate the table if any cell in the table is the active selection.). Editing in this manner allows for easy copy / paste of values between objects using Ctrl + C and Ctrl + V.

Name	12-GGK799	New Shirt
Name	12-GGK799	New Shirt
Object Type	Item	Item
Revision	0.13 Last edited by USER7 on W...	0.1 Last edited by USERE on Tue ...
Path	Primary Product Hierarchy/Produ...	Primary Product Hierarchy/Produ...
Approved	Approved	Never Been Approved
Translation	Translation	Not Translated
Default InDesign template	Default InDesign template	
Default Quark template	Default Quark template	
UPC	UPC	
EAN	EAN	
GTIN	GTIN	
Provider GLN	Provider GLN	
Completeness Score	Completeness Score	

Right-clicking in any data *cell* will expose the **Hide Equal** and **Mark Different** options, which are especially useful when working across multiple objects as they will hide all equal values, or highlight all different values, respectively.

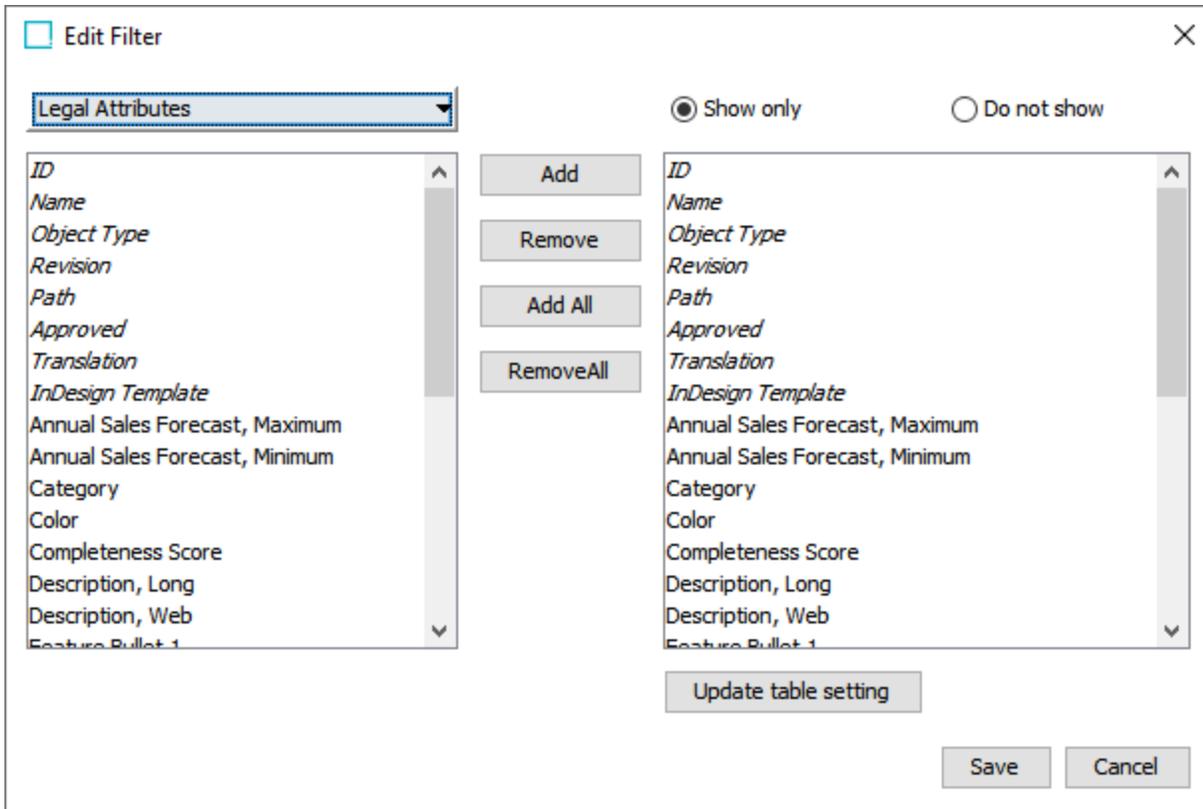
Name	Object Type	Re
- All -	- All -	-
Name	Object Type	Re
18217-054	Sales Item	0.
18207-012	Sales Item	0.
18214-012		
18215-012		
18217-012		

	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V
	Paste Link	Ctrl+L
Rotate Table		
Hide Equal		
Mark Different		

Additional options for viewing data are available using the **View** menu located in the upper left corner of the multi-editors.

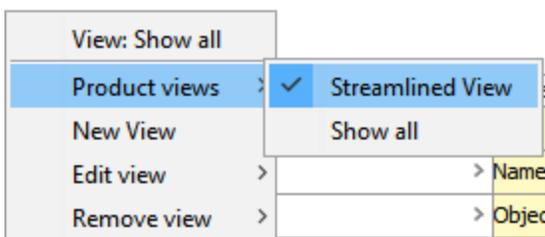
Product	Product Variants	Sub Products
View: Show all		
Product views >		
New View >		
Edit view >		
Remove view >		

The default view option is to **Show all** which displays all data on the object, similar to what would be available in a single-object editor. Additional options can be configured using the **New View** option. Clicking this opens a dialog for users to enter a name of the view. Clicking OK in that dialog opens an Edit Filter dialog where the user can select the attributes to be included in the view.



The dialog defaults to having only "legal" attributes shown, meaning those attributes that are valid for the object, as well as standard aspects of the object such as ID and Name. Note that object aspects are italicized, while attributes are shown in standard text. By default, all available attributes and aspects are shown in both the left and right panels. The dropdown in the upper left corner also has options to expose standard attribute search / browse functionality, though typically the Legal Attributes selection is used as this prevents a user from defining an invalid view. The 'Show only' and 'Do not show' radio buttons are applicable to the right panel, where the data for the view is defined. The **Add** button is used when an attribute or aspect has been selected in the left panel and should be added to the view (the right panel). The **Remove** button is used when an attribute or aspect has been selected in the right panel that should be removed the view. The **Add All** and **Remove All** buttons are used to add or remove all attributes and aspects from the view. Clicking **Save** stores the new view.

Once one or more views have been created, they are available for selection from the **View** menu under **Product views**.



An existing view can be edited using the **Edit view** option, and a view that is no longer needed can be removed with the **Remove view** option.

Note: Views are user-specific and machine-specific, so a view created by one user will always be available for that user when using the machine on which they created the view, but will not be available for any other user or for the same user working from a different machine. Workbench views are stored in an XML file on the user's local machine at C:\Users\[user]\STEPUserViews[UserID].xml. If the file is deleted, the configured views will no longer be available.

Right-Click Editing Options

Additional editing options are available by right-clicking within the various editors. These include standard cut / copy / paste options, as well as more exotic options which are briefly described below.

Note: Not all options are available and/or enabled at all times. Some options are available only for particular attribute validation types, and others are available only on specific editors and/or object types. Menus also change based on whether the right-click takes place on the column or row header, or within the active editable value field, as well as when a single object / column / row has been selected vs. when multiples are selected.

- **Character Tag:** Used as a quick option to add tags to attribute values without having to enter the Rich Text Editor. Character tags that have been defined for the system will be available as sub-options to the Character Tag selection. For more information, see the Tags topic in the System Setup / Super User guide.
- **Edit:** Used to open the Rich Text Editor for attribute values, allowing users to apply styles, formatting, spell check, special characters, etc.
- **Filter:** Used to filter the displayed data under any flipper, by values, and is exposed by clicking the column header. This can be especially useful when working with attribute groups with a large number of attributes in them as it allows users to filter based on empty / populated, greater than / less than, etc.
- **Footnote (Insert / Edit):** Used to add an additional piece of information (e.g., a footnote) to an attribute value. Footnotes are added / edited within the Rich Text Editor so using these options will open that dialog. Note that footnotes are only supported for use in conjunction with STEP tables. Using footnotes within attribute values that will output in something other than a table will not yield the expected results. For more information on footnotes, see the Tags topic in the System Setup / Super User guide.
- **Hide:** Used to hide a particular row or column from view, and a hidden row or column is exposed by clicking on the row indicator or column header.
- **Hyperlink (Insert / Edit, Follow, End):** Used for adding hyperlinks to attribute values. Highlight text within the attribute value and select the insert option to provide a hyperlink to be assigned to the selected text. After inserting, and with the cursor at the end of the hyperlinked text, use the end option. This ends the hyperlink so that subsequent text does not become part of it. Use the edit option to edit a previously inserted hyperlink. Select the follow option while the cursor is within the hyperlinked text to follow the hyperlink. For more information, see the Tags topic in the System Setup / Super User guide.
- **Inline Reference (Insert / Edit, Copy as):** Used to add inline references to attribute values. Inline references are used to re-use values present within another attribute, object Name, or ID. This avoids duplication of data by maintaining the data only once, and re-using it from that source as needed. For example, a description attribute may need to dynamically include the object Name, e.g., '[Name] is a great product!'. Detailed

information on working with inline references is available in the Inline References in Attribute Values topic within this guide.

- **Insert Special Character:** Used as a quick option to add special characters to attribute values without having to enter the Rich Text Editor. Opens an editor allowing for selection of the most recently used special characters, with an option to access a full Unicode character menu. For more information, see the Tags topic in the System Setup / Super User guide.
- **Override:** Used to manually populate a local value to override a calculated (derived) value. This option is only enabled on calculated attributes. For more information, see the Calculated Attributes topic in the System Setup / Super User guide.
- **Recalculate:** Used for on-demand display of calculated attribute values in the editor if they have previously been disabled via the 'Disable calculated values' option in the View menu. For more information, see the Calculated Attributes topic in the System Setup / Super User guide.
- **Rotate Table:** Used to rotate the data display. As a right-click option, it is only enabled from row / column headers when multiple objects are selected. For a single object, it can be used to rotate the data under a flipper only via keyboard shortcut (Alt + F11).
- **Show All (Rows / Columns):** Enabled after the Hide action has been taken, and exposes all hidden rows / columns.
- **Sort:** Used to sort data based on attribute value rather than attribute name or display sequence. This option is exposed when a column header is selected, and requires a sort selection (Ascending, Descending, or None).
- **Style:** Used as a quick option to add styling to attribute values (e.g., bold or italics) without having to enter the Rich Text Editor. Styles that have been defined for the system will be available as sub-options to the Style selection. For more information, see the Tags topic in the System Setup / Super User guide.

Additional Information

In addition to the main editors for objects, several other tabs / editors are available for editing objects, such as References, Referenced By, etc. However, the available editors and functions within them vary based on the selected object. Therefore, they are described in the context of the type of object being edited, in the subsequent sections of this guide:

- Assets
- Classifications
- Collections
- Entities
- Products
- Recycle Bin for Tree
- Publications: The publication hierarchy and its associated objects are detailed in the **Publication Hierarchy** section of the **STEP Publisher** documentation.

Inline References in Attribute Values

Inline references can be embedded in attribute values for attributes that have **Text**, **Text (exclude tags)**, **Numeric Text**, and **Numeric Text (exclude tags)** validation base types. An inline reference use case follows:

You are working with product objects whose model number is the same as their STEP ID (for example, '12345'). On these objects there is an attribute called 'Product Description' that needs to dynamically reference the object's model number within the text of the attribute. For a Product Description such as 'Acme lawn mower, model number 12345,' the inline reference to the STEP ID would populate '12345.' Using an inline reference in this instance helps to avoid duplication of effort—since the product's model number already exists in STEP as its ID, there is no need for users to manually enter it a second time into the system.

Also, in many cases inline references are easier to use than calculated attributes and easier on system resources. For example, it may be easier for users to use an inline reference to pull in a STEP ID than to create a calculated attribute using the formula 'StepID()'.

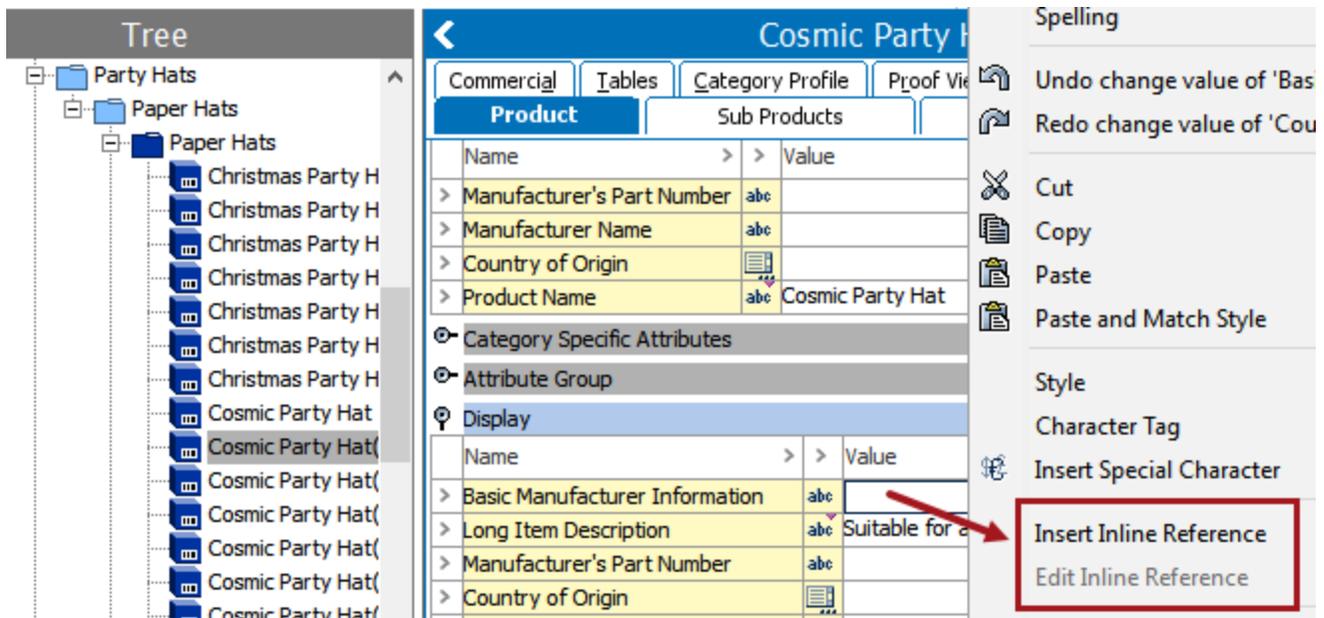
One attribute value can include several inline references. An inline reference can reference either a single attribute or an attribute group.

Inserting an Inline Reference using Workbench

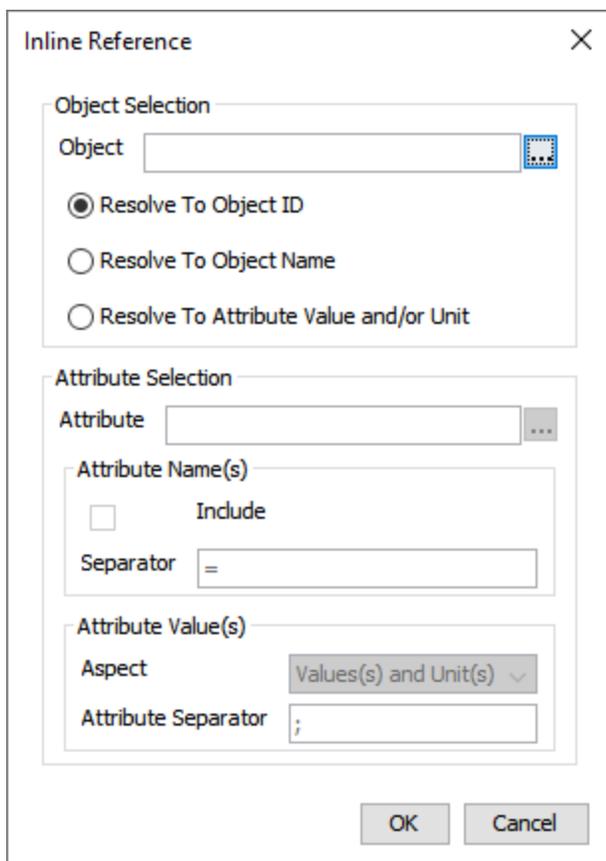
1. Select the relevant node. The corresponding editor appears.
2. Click on the leftmost tab within the editor, which is different depending on the object type (for example, 'Product', 'Classification', 'Images & Documents', 'Publication,' and so forth).
3. Activate the **Value** field of the relevant attribute where you want to create or edit the inline reference. Or, highlight the field, right-click, and select **Edit** to launch the larger value editor.

Note: Pressing **Alt + F2** will also open the value editor.

4. Place the cursor at the position in the **Value** field where you want to insert the inline reference, or place the cursor on an existing inline reference to be edited.
5. Right-click, and then click **Insert Inline Reference** to add a new inline reference or **Edit Inline Reference** to edit an existing inline reference.

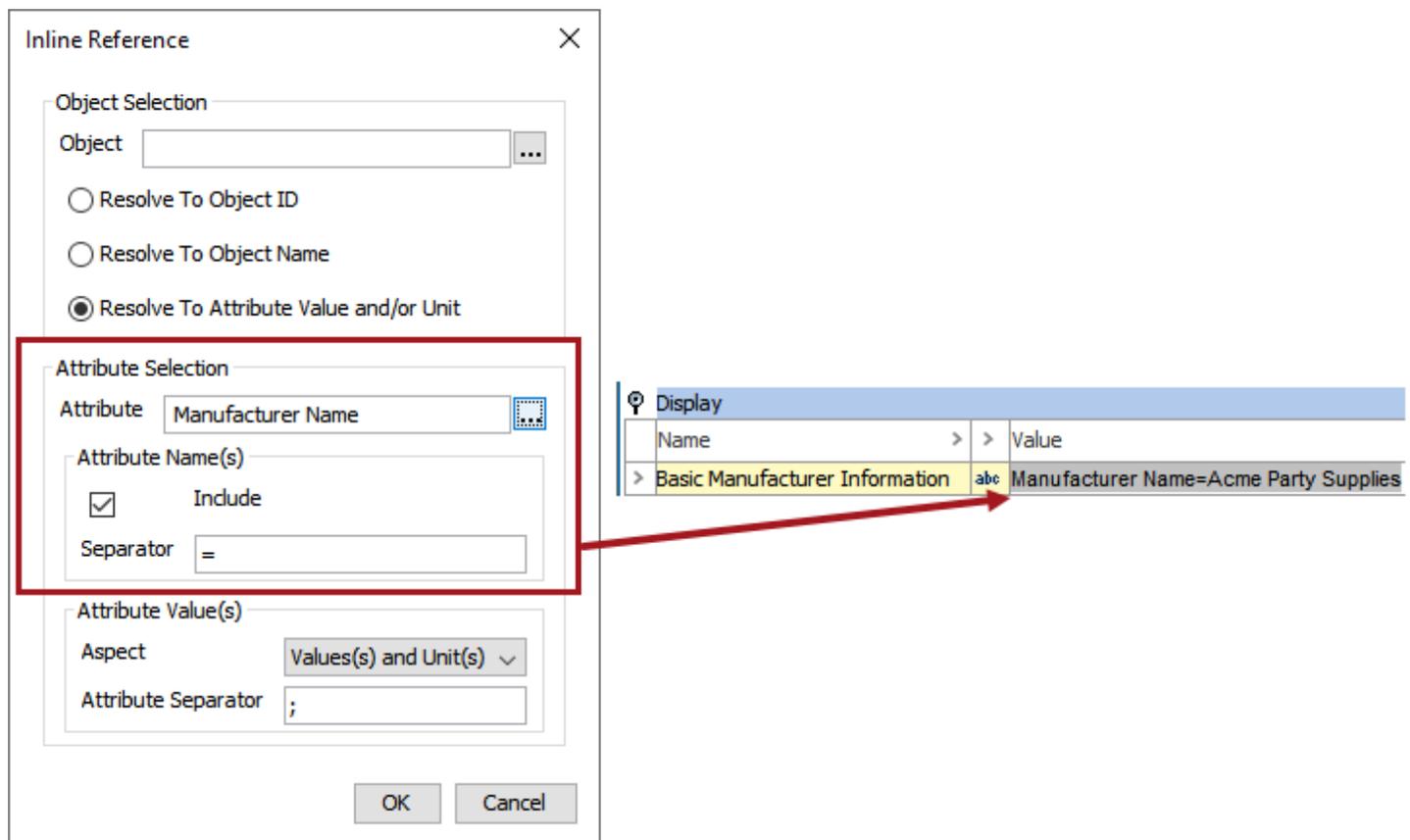


6. The **Inline Reference** dialog displays.



7. If you do not wish to return the name or ID of the current object and instead want to return a value or values from another object in STEP, click the ellipsis button (...) to the right of the **Object** field. Ignore this field if you plan to return value(s) from the current object instead.
 - Click the ellipsis button (...) to display the 'Select Object' dialog, search for or browse to the object that holds the value(s) that you would like to return, then click **Select** to choose the object.
8. Select **Resolve To Object ID** to return the value of the STEP ID of the chosen or current object.
9. Select **Resolve To Object Name** to return the value of the STEP Name of the chosen or current object.
10. Select **Resolve to Attribute Value and/or Unit** to activate the options in the 'Attribute Selection' portion of the Inline Reference dialog.
11. Click the ellipsis button (...) to the right of the **Attribute** field to open the 'Select Attribute or Attribute Group' dialog.
12. Search for or browse to the relevant attribute or attribute group for the inline reference, and then click **Select**.
13. For **Attribute Name(s)**, check the **Include** box if the name of the attribute(s) should be included in the inline reference.
14. In the **Separator** field, type a separator to be used between the name and value of the attribute. The default is the equals sign (=). Note that the Separator field is not activated unless the **Include** box has been checked.

For example, if a single attribute is chosen, and the **Include** box is checked, the results will look as follows:



The 'Inline Reference' dialog box is shown with the following settings:

- Object Selection:** Object field with an ellipsis button (...).
- Resolution Options:**
 - Resolve To Object ID
 - Resolve To Object Name
 - Resolve To Attribute Value and/or Unit
- Attribute Selection:**
 - Attribute: Manufacturer Name
 - Attribute Name(s): [Empty]
 - Include
 - Separator: =
- Attribute Value(s):**
 - Aspect: Values(s) and Unit(s)
 - Attribute Separator: ;

An arrow points from the 'Include' checkbox in the dialog to the following table:

Display		
Name	>	Value
> Basic Manufacturer Information	abc	Manufacturer Name=Acme Party Supplies

15. Under **Attribute Value(s)**, select the relevant **Aspect** from the dropdown list. Available options are 'Value(s) and Unit(s),' 'Unit(s),' and 'Value(s).'
16. In the **Attribute Separator** field—which is only valid when an attribute **group** has been chosen for the Attribute selection—type in one or more characters to specify how the attribute values should be separated. The default is the semicolon character without a following space (;).

The following screenshot shows:

- (1) An attribute group called 'Manufacturer Information' selected for **Attribute**
- (2) A **separator** of = placed between the attribute name and attribute value
- (3) An **attribute separator** of ; placed between each attribute within the group
- (4) How the attributes and attribute values resolve in the inline reference.

The screenshot illustrates the configuration of an inline reference. The 'Inline Reference' dialog box is shown with the following settings:

- Object Selection:** Object (empty), Resolve To Object ID, Resolve To Object Name, Resolve To Attribute Value and/or Unit.
- Attribute Selection:** Attribute: Manufacturer Information.
- Attribute Name(s):** Include.
- Separator:** =
- Attribute Value(s):** Aspect: Values(s) and Unit(s).
- Attribute Separator:** ;

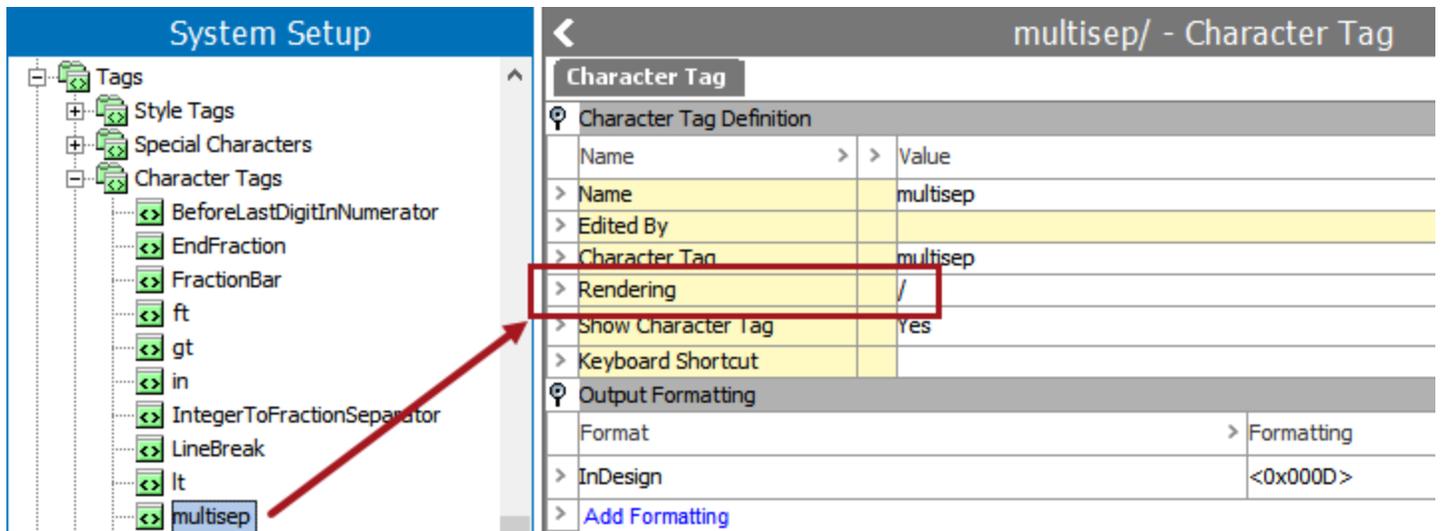
The resulting 'Display' table shows the resolved inline reference:

Name	Value
> Manufacturer's Part Number	abc 121177
> Manufacturer Name	abc Acme Party Supplies
> Country of Origin	HONG KONG
> Product Name	abc Cosmic Party Hat
> Basic Manufacturer Informati	abc Country of Origin=HONG KONG;Manufacturer Name=Acme Party Supplies;Manufacturer's Part Number=121177;Product Name=Cosmic Party Hat

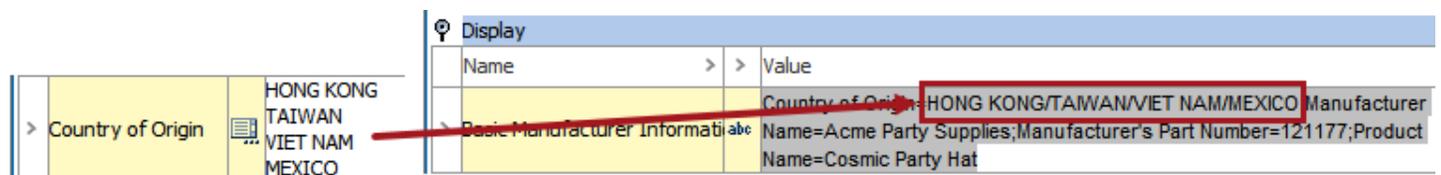
17. Click **OK** to complete the configuration of the inline reference.

Inline References and Multi-Valued Attributes

The **Attribute Separator** field in the Inline Reference dialog does *not* apply to the values of multi-valued attributes. Instead, the separator for values of multi-valued attributes is handled by the <multisep/> tag (**multisep**). The multisep tag is a **Character Tag** in System Setup and comes standard with STEP systems. STEP stores the values of multi-valued attributes with the multisep tag between them, and this tag typically renders as a forward slash (/).



If a multivalued attribute is used in an inline reference, the rendering setup for the multisep tag will be shown between each of the values. In the below example, the 'Country of Origin' attribute has four values. When rendered in the inline reference, these four values are separated by the forward slash (/) character.

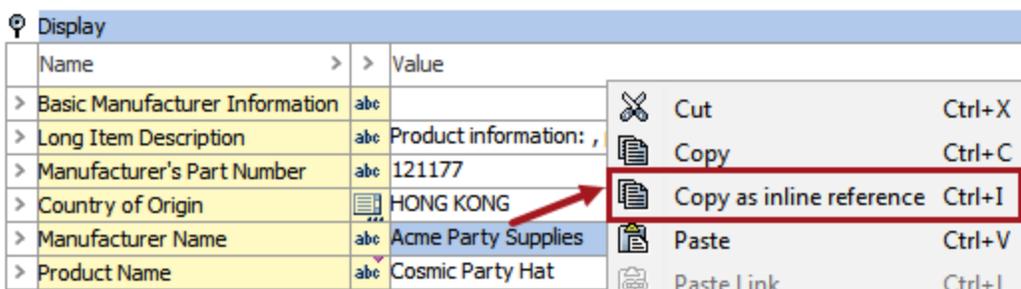


For more information on STEP character tags, see the **Tags** topic in the **System Setup / Super User Guide** documentation.

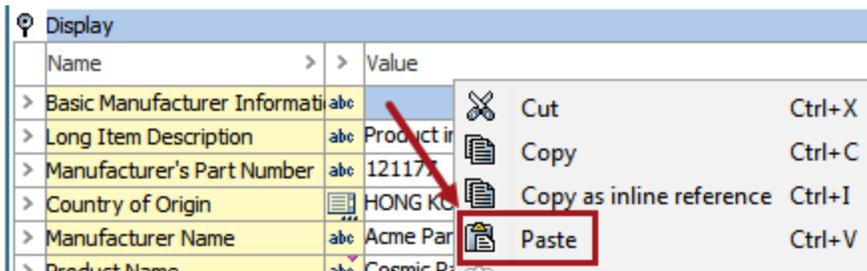
Copying Attribute Values as Inline References

An alternate—and quicker—method of creating an inline reference is to copy the value of an attribute, then paste it into the value editor of another attribute as an inline reference. This inline reference can then be edited like any other inline reference.

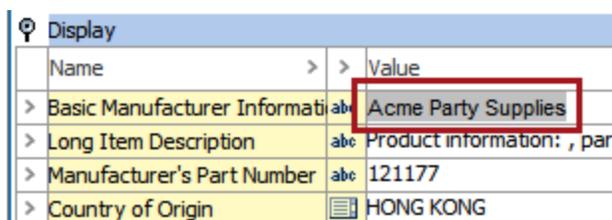
1. Navigate to the attribute value that you would like to use as an inline reference and select the value editor field.
2. Right-click and select **Copy as inline reference**.



3. Navigate to the 'destination' attribute value and select the value editor field.
4. Right-click and select **Paste**.



5. The value appears in the destination field as an inline reference.



Note: The copied 'source' attribute value is connected to the 'source' object, meaning that any time an attribute value is copied as an inline reference and pasted elsewhere, the inline reference will never pick up the attribute value from the current object but only from the 'source' object. Also, STEP IDs and STEP names cannot be copied as inline references.

Christmas Party Hat rev.0.11 - Product

Commercial | Tables | Category Profile | Proof View | Status | State Log | Tasks

Product | Sub Products | Referer

> Status		
> URL	URL	
> Value 1	abc	

Manufacturer Information

Name	>	>	Value
> Manufacturer's Part Number	abc		
> Manufacturer Name	abc		
> Country of Origin			
> Product Name	abc		Christmas Party Hat

Category Specific Attributes

Attribute Group

Display

Name	>	>	Value
> Basic Manufacturer Informati	abc		Acme Party Supplies
> Long Item Description	abc		Celebrate the holidays w

Inline Reference

Object Selection

Object  Cosmic Party Hat

Resolve To Object ID

Resolve To Object Name

Resolve To Attribute Value and/or Unit

Attribute Selection

Attribute

Attribute Name(s)

Include

Separator

Attribute Value(s)

Inserting an Inline Reference using Web UI

Rich text editing allows users to enter and edit text within a web browser. Inline references can be inserted into an attribute value using a Rich Text Editor (RTE) within a Node Editor.

Adding an inline reference in Web UI is similar to adding one in the workbench. For instructions, see the **Rich Text Editor** section of the **Web User Interfaces** documentation.

Assets

This topic covers information specific to the asset super type that is important to know when working with assets. For general object maintenance information (applicable to all object types rather than specific to assets), see the **All Objects** topic within this guide.

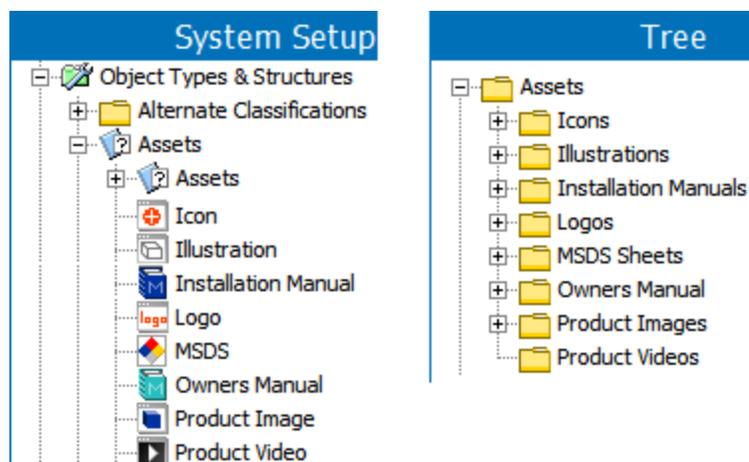
An asset is any product-related electronic file, such as images (tiff, eps, jpeg, etc.), Word docs, Excel files, PDFs, PowerPoint files, text files, etc. Images are a common asset so they will be the focus of this section. In most cases, the terms “asset” and “image” are interchangeable.

Although any image can be loaded into STEP regardless of its quality or origin, it is important that a quality check be performed by users with graphic arts knowledge. Ideally, this check occurs prior to import into STEP so that only approved images are available in the system.

Classification of Assets

Asset objects live in a classification hierarchy. The classification hierarchy for assets should be separated from other classification hierarchies (e.g., those used for alternate structuring of products, import / export configuration storage, etc).

The recommendation is to have one classification object type and instance for each asset object type. For example:



Within the individual type-based classifications, additional levels can be modeled if necessary. A common option is to work with a 2-level folder structure based on the first characters of the asset file name. For example:



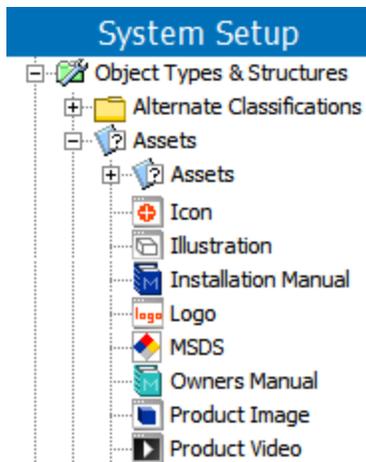
With a structure like this, it is not intended that users should be browsing the hierarchy to locate assets. Instead, assets are typically located via references from other objects and/or via searches. Note that STEP does not require that the image hierarchy have multiple levels. Assets can be stored in a single folder (e.g., a flat structure). However, this is not typically recommended as it can be impractical to navigate the hierarchy as the number of assets increases.

Notice that the same asset object can exist below multiple different classifications. However, this functionality is typically only used for cases where suppliers upload assets. These assets will initially go into supplier-specific classifications and can subsequently also be linked into the primary asset hierarchy.

Asset File Type Designation

New asset object types are defined in STEP the same way any other object types are, via the System Setup tab. One key difference between asset object types and other object types, such as products or classifications, is that there are no parent-child relations between assets, as asset instances live in classification hierarchies.

Asset object types are defined in STEP Workbench System Setup under 'Object Types & Structures.' Apart from the built-in generic type 'Assets', it will be a flat list of the different asset object types required for the setup. For example:

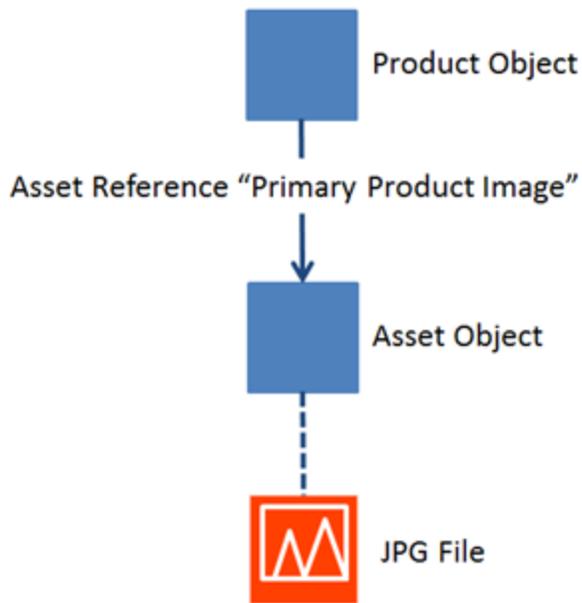


On older STEP installations you will often see asset object types that are file-type specific. For example: JPG Image, Word Document, etc. For newer installations, this file type approach is generally not used, and instead, it is recommended to use object types that convey information about the asset's use (as shown above), rather than the file type. This is done for clarity as it is often more important to understand the purpose of the asset. For example, an asset is not just a PDF file, instead it is an Installation Manual, a Product Brochure or an Owner's Manual. One advantage of the purpose-based setup is that it is possible to restrict reference types to point to the specific types of assets and not just to generic file types.

With the move away from file type specific asset object types, asset object types cannot be applied automatically when digital media files are imported into STEP as there is no 1:1 relationship between file types and asset object types. It is possible to have object types automatically applied upon import when a file-based approach is used, but this functionality generally does not weigh up to the disadvantages of the approach.

Asset Objects and Digital Media Files

A fundamental point when dealing with assets is that there is no 1:1 relationship between asset objects and digital media files in STEP. Thus, it is possible to work with asset objects that do not have "content", i.e., are not tied to any digital media files. Furthermore, the content can be dimension-dependent so that an asset is tied to different files in different contexts. Finally, an asset can have different content in different historical revisions.



As explained in the next section, there are different options for how and where the actual digital media files are stored. Independently of which option is selected, asset objects are stored in STEP and it is to these objects (not to the actual media files) that relations are modeled (using references).

Image Variants and Handling

Different publishing projects impose various requirements on the use of images. For example, a high-resolution image in STEP may be a TIFF. However, for the web, a jpeg is needed. Or, if the high-resolution image is an EPS, a GIF may be needed instead of a jpeg.

To handle these scenarios, STEP can use the original high-resolution image to generate the needed image versions based on a set of templates or image conversion pipelines. When using an image conversion, the images in STEP must be of sufficient quality to allow these variations to be properly created.

More information on image conversions is available in the **Image Conversion Configuration** topic in the **Digital Assets** guide.

More Information

For specific details about working with assets in the workbench, see the **Maintaining Assets** and **Linking Assets to Products** topics within this guide.

For information on working with assets in Web UI, see the **Asset Handling in Web UI** topic in the **Web User Interfaces** guide.

For information on importing, exporting, and managing assets, see the **Digital Assets** guide.

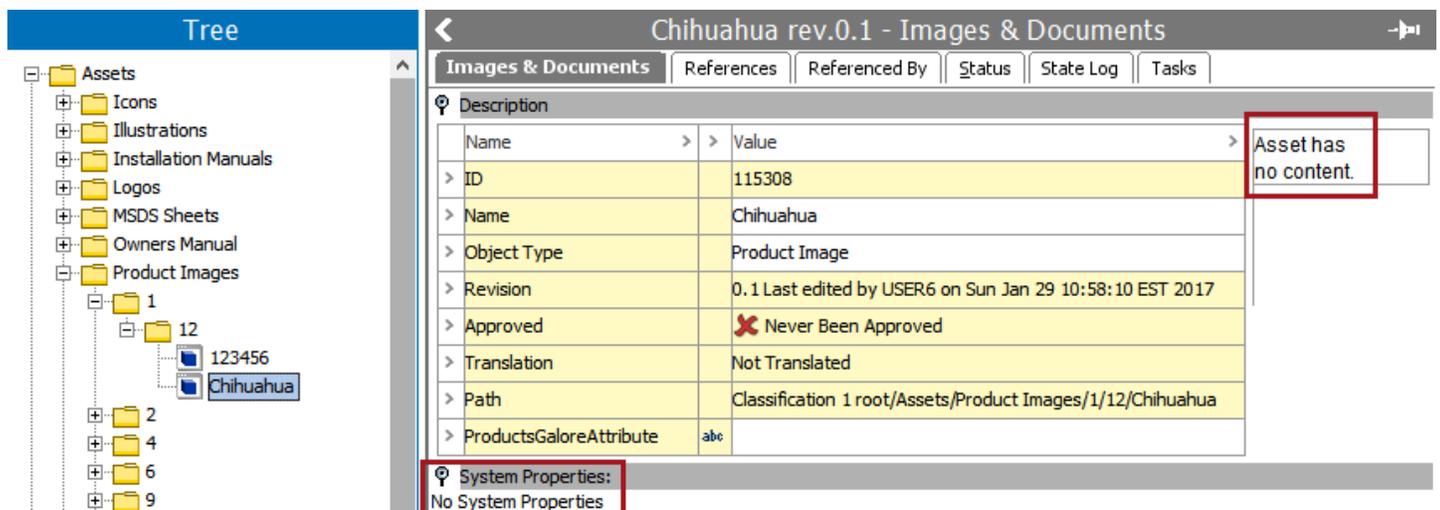
Maintaining Assets

This topic covers information specific to the Asset super type that is important to know when working with assets. For general object maintenance information (applicable to all object types rather than specific to assets), see the **All Objects** topic within this guide.

Creating Assets

The basic methods for creating an asset are the same as any other object type, as described in the **Creating Objects in Tree** topic within this guide. However, there are a few considerations that are specific to assets that users should be aware of when creating assets, which are described.

Assets are essentially placeholders in STEP, to which a digital media file must be associated. When assets are created in STEP via import of a digital media file, this association happens automatically. However, when assets are created using standard object creation methods in Tree (e.g., right-clicking on a classification folder and selecting 'New Asset'), it is only the placeholder that is created. An asset created in this manner will initially have no system properties and no content. For example:



The screenshot shows the 'Tree' view on the left and the 'Chihuahua rev.0.1 - Images & Documents' details view on the right. The 'Tree' view shows a hierarchy of folders under 'Assets', with 'Chihuahua' selected. The details view shows the following properties:

Name	Value
ID	115308
Name	Chihuahua
Object Type	Product Image
Revision	0.1 Last edited by USER6 on Sun Jan 29 10:58:10 EST 2017
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Product Images/1/12/Chihuahua
ProductsGaloreAttribute	abc

System Properties: No System Properties

Asset has no content.

A user can right-click on the asset and select **Replace Asset Content** to open a dialog where a digital media file can be selected from the local machine. STEP will automatically read and populate the properties of the asset, and a thumbnail of the digital media file will display. For example:

Tree

- Assets
 - Icons
 - Illustrations
 - Installation Manuals
 - Logos
 - MSDS Sheets
 - Owners Manual
 - Product Images
 - 1
 - 12
 - 123456
 - Chihuahua**
 - 2
 - 4
 - 6
 - 9
 - A
 - B
 - C
 - D
 - E
 - F
 - G
 - H
 - I
 - L
 - M
 - O
 - P
 - R
 - S
 - W
 - Y
 - Chrysanthemum
 - Product Videos
 - Configurations
 - ETIM Hierarchy

Chihuahua rev.1.0 - Images & Documents

Images & Documents | References | Referenced By | Status | State Log | Tasks

Description

Name	Value
ID	115308
Name	Chihuahua
Object Type	Product Image
Revision	1.0 Last edited by USER6 on Sun Jan 29 10:59:56 EST 2017
Approved	✗ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Product Images/1/12/Chihuahua
ProductsGaloreAttribute	abc



System Properties:

Name	Value
Class	abc True color
Colorspace	abc RGB
Compression	abc JPEG
Depth	123 8 (bits/sample)
Extension	abc jpg
Filename	abc 136.JPG
Format	abc JPEG (Joint Photographic Experts Group JFIF image)
Height	123 1151.46 (mm)
MIME Type	abc image/jpeg
Pixel Height	123 3264 (pixels)
Pixel Width	123 2448 (pixels)
Profile	abc Custom EXIF, Custom XMP
Samples	123 3 (samples/pixel)
Size	abc 2,270,288
Upload Time	abc 2017-01-29 10:59:56
Width	123 863.59 (mm)
Horizontal DPI	123 72 (dpi)
Vertical DPI	123 72 (dpi)

To avoid this two-step process, assets are often introduced in STEP via import (or specific transfer protocols for an initial implementation). More information on importing assets is available in the Importing Assets section of the Digital Assets guide.

Asset Editor

General information about editing objects in STEP is available in the **Editing Objects in Tree** topic within this guide and is not repeated in this section. However, assets have some additional editing options specific to working with digital media files, which are described.

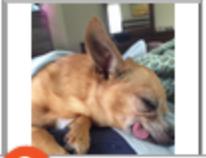
Images & Documents

The Images & Documents tab is the primary workbench interface for assets. It has three sections, described below.

Images & Documents | References | Referenced By | Status | State Log | Tasks

1 Description

Name	Value
ID	115308
Name	Chihuahua
Object Type	Product Image
Revision	1.0 Last edited by USER6 on Sun Jan 29 10:59:56 EST 2017
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Product Images/1/12/Chihuahua



3 Edit Asset
External Viewer
Save to disk
Image Viewer

2 System Properties:

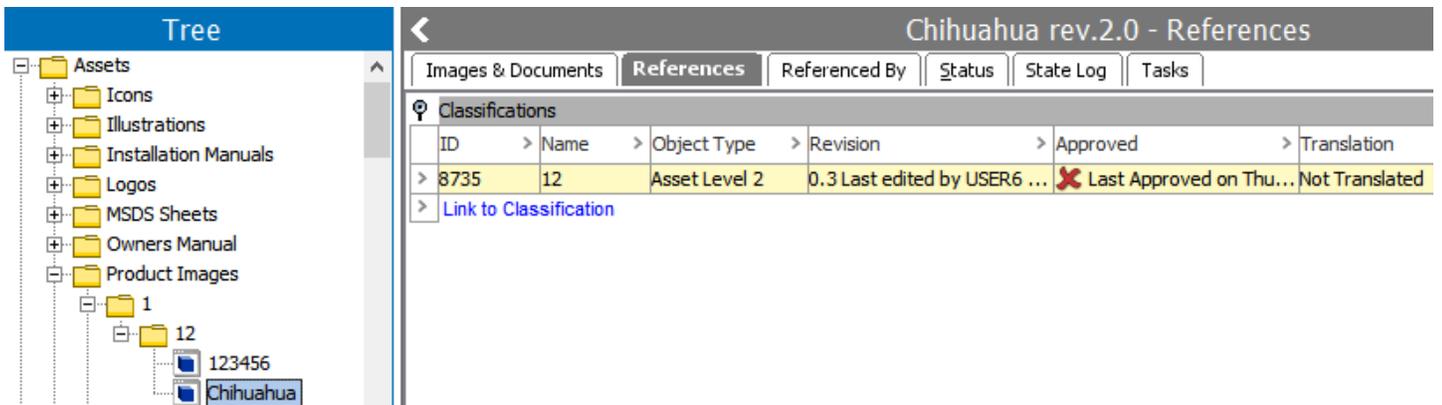
Name	Value
Class	True color
Colorspace	RGB
Compression	JPEG
Depth	8 (bits/sample)
Extension	jpg
Filename	136.JPG
Format	JPEG (Joint Photographic Experts Group JFIF image)
Height	1151.46 (mm)
MIME Type	image/jpeg
Pixel Height	3264 (pixels)
Pixel Width	2448 (pixels)
Profile	Custom EXIF, Custom XMP
Samples	3 (samples/pixel)
Size	2,270,288
Upload Time	2017-01-29 10:59:56
Width	863.59 (mm)
Horizontal DPI	72 (dpi)
Vertical DPI	72 (dpi)

1. The **Description** flipper contains the same basic information as other object types. Additional Description attributes can be made valid for assets to support data such as keywords or asset descriptions. Specification attributes cannot be made valid for assets.
2. The **System Properties** flipper displays data that is read automatically from the digital media file. This information cannot be edited.
3. The asset thumbnail has a number of options available for editing assets. Additional right-click options are also available when the asset itself is right-clicked from the Tree. All of the options that are specific to assets only (accessible from right-click on the thumbnail or the asset) are described below.
 - **Create Local Content of Asset:** Creates a local version of the asset specific to the current context. See the Asset Dimension Dependencies section below for more information.

- **Delete Local Content of Asset:** Deletes the content of an asset that is *not* dimension dependent. Deletes the *local* (context-specific) content of the asset if the asset *is* dimension dependent. See the Asset Dimension Dependencies section below for more information.
- **Edit Asset:** Opens the digital media file for editing in an external program, in addition to an Edit Asset dialog in STEP. Upon completion of editing in the external program, click save within the program to store the edited asset to a temporary directory. Then click OK in the Edit Asset dialog in STEP to have STEP retrieve the edited file from the temporary directory and store this in the asset. Note that the media file will open in the application associated with the file type. For example, for files ending with .xls, Excel will automatically be launched. This may be different from computer to computer. One user's computer may open up EPS images in Photoshop, while another user's computer may open the same file types in Illustrator.
- **Export Images & Documents:** Opens the Export Images and Documents wizard to make selections to export the currently selected asset(s). See the Export Images and Documents Wizard topic in the Digital Assets guide for more information.
- **External Viewer:** Opens an external viewer for viewing the asset. This is comparable to the Edit Asset function in that the program that is utilized is specific to the file type and the user's computer settings. It differs in that any changes made to the asset in the external program are not saved back to STEP.
- **Image Viewer:** Opens an image viewer within STEP for the user to examine the actual asset (as opposed to just the thumbnail).
- **Push Asset(s):** Initiates asset push for the selected asset(s). See the Asset Push section of the Digital Assets guide for more information.
- **Replace Asset Content:** Opens a dialog for the user to select a digital media file for the asset. See the 'Creating Assets' section above for more information.
- **Save to disk:** Opens a standard save dialog allowing the user to select a location on their local machine to save the digital media file to.
- **Unlink asset:** Only enabled if the asset has been linked directly into a publication, in which case it unlinks the asset from the publication. See the Publication Hierarchy section of the STEP Publisher (Adobe InDesign Integration) guide for more information.

References

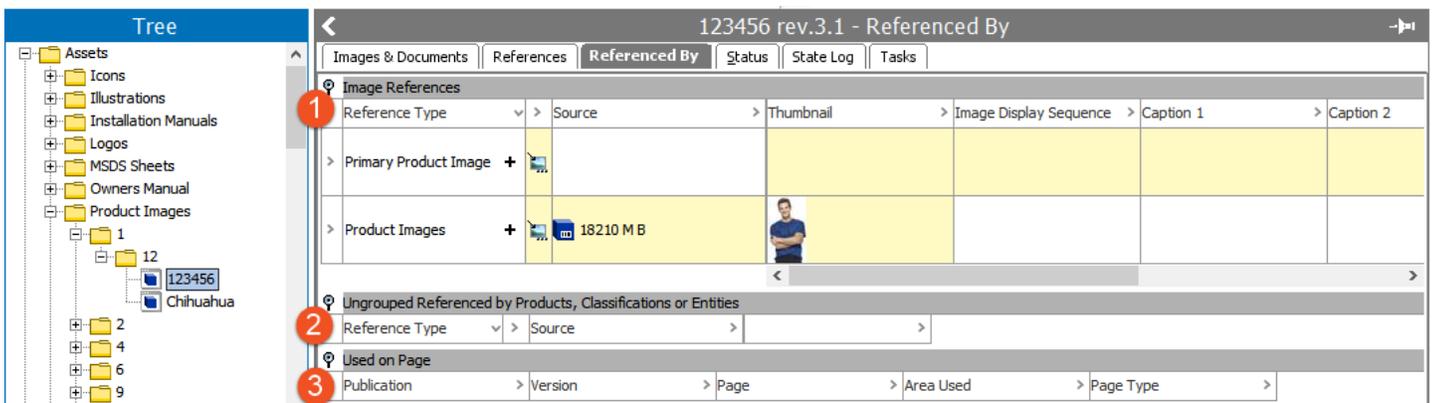
The References tab displays the classifications that the selected asset is linked to, and allows for linking to additional classifications using the **Link to Classification** link. Each asset must be linked to at least one classification, but may be linked to many. Links can be removed by right-clicking on the row indicator and selecting 'Remove Link to Classification'. The Name of each classification displayed is hyperlinked for easy navigation, and revision, approval, and translation statuses are also displayed.



Note: While the maximum number of references to one object node is limited to 10,000 instances, this value can be changed; however, it is against Stibo Systems recommended practices to use this many references. Before changing this value, contact your Stibo Systems account manager or partner manager for assistance.

Referenced By

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). The display of the Referenced By tab on an asset will vary slightly from system to system, based on the data model.



- Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid target that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a source for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.

2. **Ungrouped Referenced by Products, Classifications or Entities:** The functionality is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
3. **Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the STEP Publisher section of the online help.

Status

The Status tab provides general information about objects, including revisions, translation status, and approval status. For more information on these basic settings, see the Status Tab topic in the Products section of this guide. For assets specifically, this tab also includes an Asset Push Status section that describes the status of assets for the various asset push configurations on the system. For more information, see the Monitoring Asset Push topic in the Digital Assets guide.

State Log

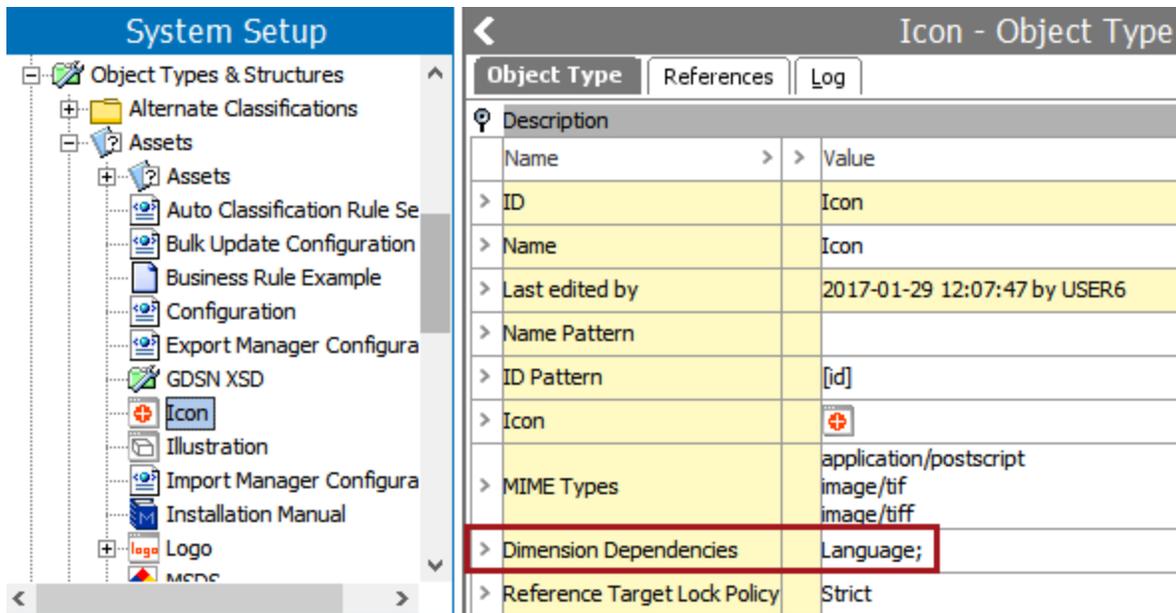
The State Log tab allows users to view the recent history of the object across all workflows in which it has been entered. See the State Log Tab topic in the Workflows documentation for more information.

Tasks

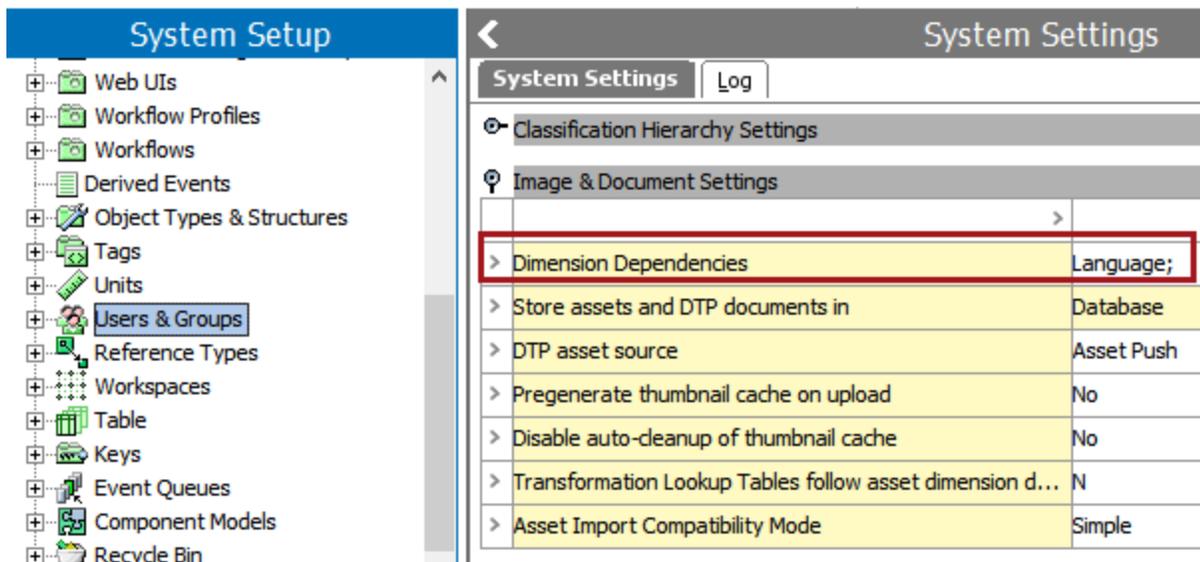
The Tasks tab displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the 'Moving Tasks through a Workflow in Workbench' topic in the Workflows guide.

Asset Dimension Dependencies

Individual asset object types can be made dimension dependent using the Dimension Dependencies parameter on the object type. This configuration will only affect the STEP Name of assets, meaning that it allows for individual assets to have a different name based on the indicated dimension dependencies (e.g., 'Red Hat' in English and 'Chapeau Rouge' in French when the dependency is Language).



It is also possible to make the content of assets dimension dependent so that an asset in STEP can be tied to different digital media files in different Contexts. This is configured using the Image & Document Settings > Dimension Dependencies parameter in System Settings.



This setting is global, meaning it applies to all assets. Unless there is a very special reason for turning on asset dimension dependencies, this should be avoided. As mentioned, the setting is global, meaning that special procedures must be implemented for creating assets that are to have the same content in all contexts. Thus, if you import a digital media file (and via this create an asset instance) in a context that does not use the top-level dimension point for the dimension on which asset content depends, the content will be created only in the dimension point the current context uses.

For additional information, see the **Image & Document Settings** topic in the **System Settings** documentation.

Custom Asset Metadata

When importing assets into STEP, System Properties attributes can be automatically created in STEP on the asset, and then populated with the image metadata detected on the incoming assets. The image metadata must be formatted as either XMP (Extensible Metadata Platform) or EXIF (Exchange Image File). Determination of which metadata attributes should be housed in STEP is configured manually.

In an image file, image metadata is stored as plain text in XML format. Based on the configuration file and import shown below, the Creator, Subject, and Description metadata will be written to STEP. In the following sample, some rows have been removed for brevity, as indicated by '...'.
 ...

```

1 <x:xmpmeta xmlns:x="adobe:ns:meta/" x:xmp:tk="Adobe XMP Core 5.3-c007 1.136881, 2010/06/10-18:11:35 ">
2 <rdf:RDF xmlns:rdf="http://www.w3.org/1999/02/22-rdf-syntax-ns#"
3   <rdf:Description
4     rdf:about=""
5     xmlns:xmpMM="http://ns.adobe.com/xap/1.0/mm/"
6     ...
7   <dc:creator> ←
8     <rdf:Seq>
9       <rdf:li>OKL Photo:RM Style:RM</rdf:li>
10    </rdf:Seq>
11  </dc:creator>
12  <dc:subject> ←
13    <rdf:Bag>
14      <rdf:li>lucite</rdf:li>
15      <rdf:li>box</rdf:li>
16      <rdf:li>chest</rdf:li>
17      <rdf:li>trunk</rdf:li>
18    </rdf:Bag>
19  </dc:subject>
20  <dc:description> ←
21    <rdf:Alt>
22      <rdf:li xml:lang="x-default">Lucite trunk</rdf:li>
23    </rdf:Alt>
24  </dc:description>
25    ...
26  </rdf:Description>
27 </rdf:RDF>
28 </x:xmpmeta>
  
```

Prerequisites

The user should have a basic understanding of XML, the XML structure of image metadata, and XPath before proceeding with configuration. The configuration file uses XML to define attribute names and the XPath query to retrieve metadata. For more information, search the web.

XMP Configuration File

The custom asset metadata configuration file uses the instruction 'XmpConfiguration' to define the name of the system attributes being created in STEP and the XPath that defines how to retrieve the image metadata.

XPath is an XML query language STEP uses to search the XML within an image file and identify the desired metadata. The XMP configuration file defines the XPath queries to be run against an image file being imported.

The following sample configuration file defines three metadata attributes (Creator, Description, and Subject), and the XPath query required to find the corresponding metadata.

```

1 <XmpConfiguration>
2   <XmpProperties allow="true">
3
4     <XmpProperty
5       name="Creator" unit=""
6       xpath="/*[name(.)='x:xmpmeta']/*[name(.)='rdf:RDF']/*[name(.)='rdf:Description']/*[name(.)='dc:creator']/*[name(.)='rdf:Seq']/*[name(.)='rdf:li']"/>
7
8     <XmpProperty
9       name="Description" unit=""
10      xpath="/*[name(.)='x:xmpmeta']/*[name(.)='rdf:RDF']/*[name(.)='rdf:Description']/*[name(.)='dc:description']/*[name(.)='rdf:Alt']/*[name(.)='rdf:li']"/>
11
12    <XmpProperty
13      name="Subject" unit=""
14      xpath="/*[name(.)='x:xmpmeta']/*[name(.)='rdf:RDF']/*[name(.)='rdf:Description']/*[name(.)='dc:subject']/*[name(.)='rdf:Bag']/*[name(.)='rdf:li']"/>
15
16    </XmpProperties>
17  </XmpConfiguration>

```

In the above example, the 'creator' attribute is defined by the text:

```
name="Creator" unit=""
```

The XPath to find the creator metadata is defined by the text:

```
xpath="/* [name (.)='x:xmpmeta']/* [name (.)='rdf:RDF']/* [name
(.)='rdf:Description']/* [name (.)='dc:creator']/* [name (.)='rdf:Seq']/*
[name (.)='rdf:li']"/>
```

Another example (an XML block in an image file and the XPath):

```

<x:xmpmeta xmlns:x="adobe:ns:meta/" x:xmpTk="XMP Core 4.4.0-Exiv2">
  <rdf:RDF xmlns:rdf="http://www.w3.org/1999/02/22-rdf-syntax-ns#">
    <rdf:Description rdf:about=""
      xmlns:iptcExt="http://iptc.org/std/Iptc4xmpExt/2008-02-29/"
      xmlns:xmpMM="http://ns.adobe.com/xap/1.0/mm/"
      xmlns:stEvt="http://ns.adobe.com/xap/1.0/sType/ResourceEvent#"
      xmlns:plus="http://ns.useplus.org/ldf/xmp/1.0/"
      xmlns:GIMP="http://www.gimp.org/xmp/"
      xmlns:dc="http://purl.org/dc/elements/1.1/"
      xmlns:tiff="http://ns.adobe.com/tiff/1.0/"
      xmlns:xmp="http://ns.adobe.com/xap/1.0/"
      iptcExt:DigitalSourceType="http://cv.iptc.org/newscodes/digitalsourcetype
/digitalCapture"
      xmpMM:DocumentID="gimp:docid:gimp:7620dabd-f6a6-435f-a865-
ff3b8315b650"
      xmpMM:InstanceID="xmp.iid:9c338c25-620b-4d53-adc7-c2a921b771cd"

```

```
xmpMM:OriginalDocumentID="xmp.did:e19d764e-1731-46ca-9fe1-8c86d0b29d05"
plus:ModelReleaseStatus="http://ns.useplus.org/ldf/vocab/MR-LPR"
GIMP:API="2.0"
GIMP:Platform="Windows"
GIMP:TimeStamp="1613727775463349"
GIMP:Version="2.10.22"
dc:Format="image/png"
tiff:Orientation="1"
xmp:CreatorTool="GIMP 2.10">
```

```
<XmpProperty name="GIMP_Version" unit="" xpath="/*[name()='x:xmpmeta']/*[name()='rdf:RDF']/*[name()='rdf:Description']/*[name()='GIMP:API'] | /*[name()='x:xmpmeta']/*[name()='rdf:RDF']/*[name()='rdf:Description']/@*[name()='GIMP:API']" />
```

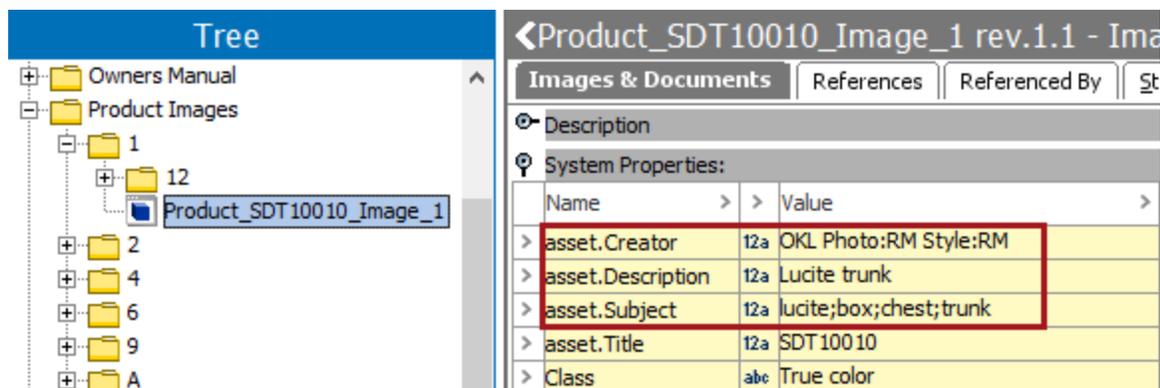
Using an XMP Configuration File

1. Create and save a custom asset metadata configuration file using XmpConfiguration instruction as shown above, that defines:
 - the image metadata attribute name(s)
 - the appropriate XPath to the required metadata on the image
2. Save the configuration file to the STEP server in the same directory as the sharedconfig.properties file.
3. Edit the sharedconfig.properties file and include the case-sensitive **XMP.ConfigFile** property as follows, where 'customxmpconfiguration.xml' is the name of the configuration file created above.

```
XMP.ConfigFile = customxmpconfiguration.xml
```

4. Save the sharedconfig.properties file.
5. Restart the STEP server to apply changes to both configuration files.
6. Import an image that includes the metadata attributes defined in the XMP configuration file.
7. Navigate to the imported asset to view the metadata assets on the System Properties flipper.

Custom attributes are identified in the STEP asset editor by the text 'asset.' which is prepended to the attribute name (for example, 'asset.Creator').



Name	Value
asset.Creator	t2a OKL Photo:RM Style:RM
asset.Description	t2a Lucite trunk
asset.Subject	t2a lucite;box;chest;trunk
asset.Title	t2a SDT 100 10
Class	abc True color

Important: Custom coding by Stibo Systems can be used to allow attributes to be displayed in workbench with names other than 'asset.[attribute name]'. For more information, contact your Stibo Systems representative.

Linking Assets to Products

If the asset's name can be matched to the product, then this function can be performed when the asset is imported. If not linked at this time, there are two ways that the interface allows the link to be made: a) from the product or b) from the asset.

There are three ways to link images to products:

- From the product
- From the asset
- From import

Note: While the maximum number of references to one object node is limited to 10,000 instances, this value can be changed; however, it is against Stibo Systems recommended practices to use this many references. Before changing this value, contact your Stibo Systems account manager or partner manager for assistance.

Linking Assets to Products (From Products)

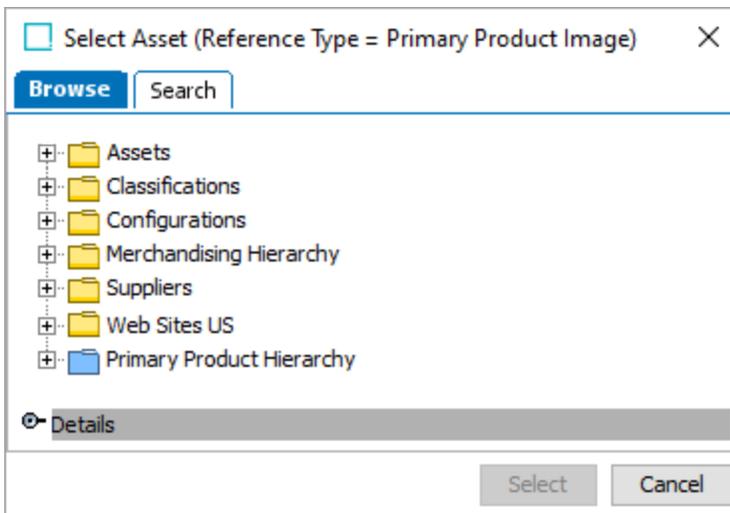
1. Select the product and then select the **References** tab.



2. Navigate to the Image References section of the **References** tab. Click on the + symbol to link the image to the correct area. For this example 'Primary Product' will be used as it is the most common reference type made.

Image References			Reference Type	+	Target	Thumbnail
>	Brand Name Logo	+				
>	Illustration	+				
>	Primary Product ...	+				
>	Product Image	+				
>	Video	+				

3. A search window displays.



- Search for and select the appropriate image. By selecting 'Primary Image,' it denotes that the image is the exact representation of the product. Once a Primary Image has been linked to a product, a thumbnail of the image will appear when the product is selected.

Image References

Reference Type	Target	Thumbnail
Brand Name Logo		
Illustration		
Primary Product Image	20805	
Product Image		
Video		

Note: When assets are linked to products, you must designate what type of reference is being made. For example, is it an image that represents the product? Is it an accessory to the product? Or a related document? This reference type denotes that the image being linked to the product is a direct representation of that product. When you make such a reference, a thumbnail of the image is attached to the product. The thumbnail will only appear for this reference type. It is possible to link more than one image to the reference type if the reference type is set to allow multiple references 'yes.'

Linking Assets to Products (From Assets)

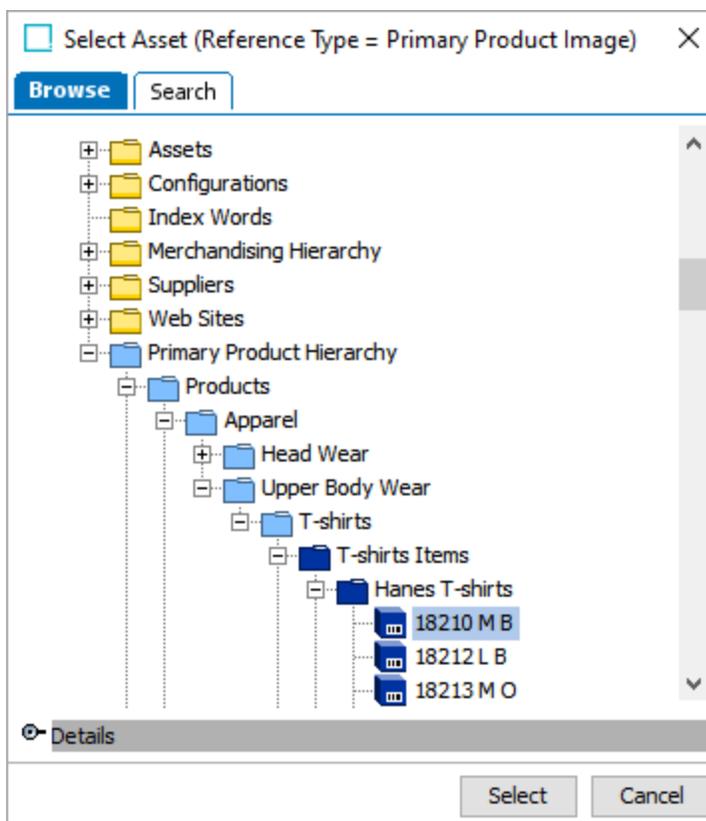
- Select the image in the Assets folder in the **Tree**. Then, select the **References by** tab.



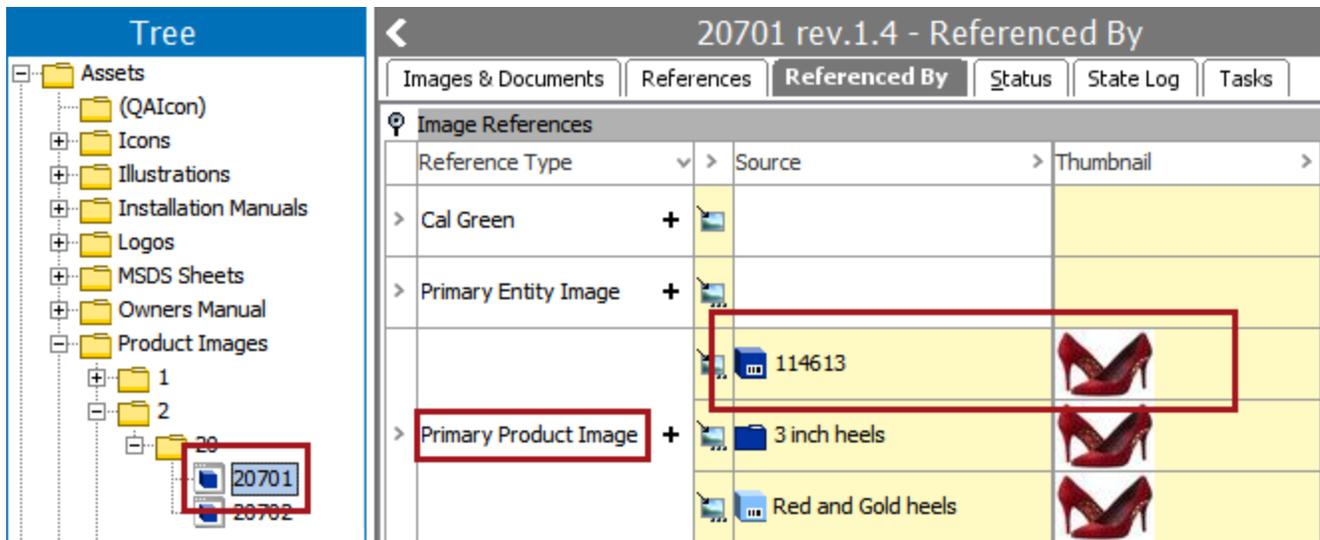
- If it is not already open, click on the 'Image References' flipper to open it. Click on the + sign for 'Primary Product Image' to link the image to the product.

Images & Documents	References	Referenced By	Status	State Log	Tasks
Image References					
Reference Type	>	Source	>	Thumbnail	
> Primary Product ...	+				
> Product Image	+				
Ungrouped Referenced by Products, Classifications or Entities					
Reference Type	>	Source	>		
Used on Page					
Publication	>	Version	>	Page	> Area Used

3. Navigate to the Product in the pop up window, and select it.



4. Selected image will be linked to the product. Once a Primary Image has been linked to a product, a thumbnail of the image will appear when the product is selected as illustrated in the below image.

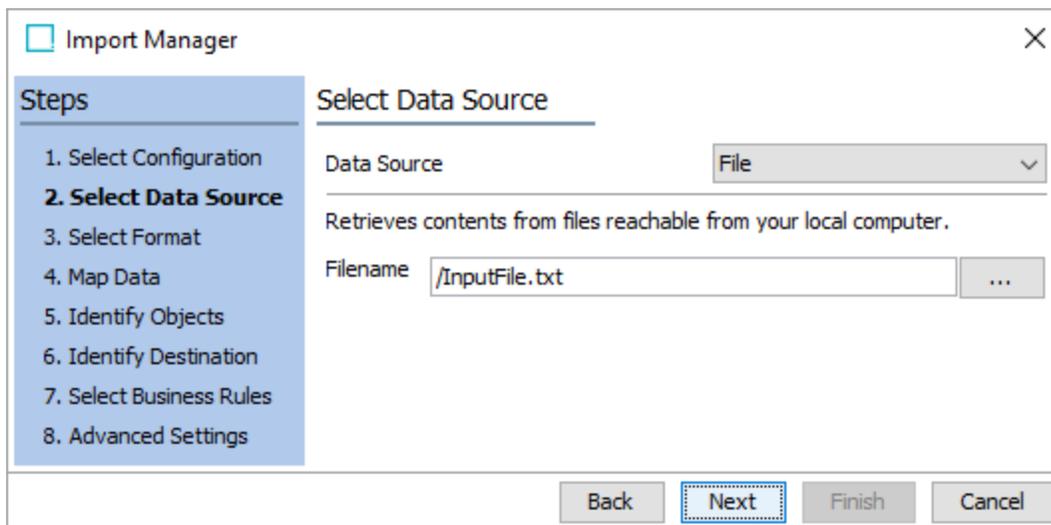


Linking Assets to Products using the Import Manager

This method is best used for large amounts of products / assets linking. Ideally, you should already have a file in Excel that has the products and desired Image ID set up according to how you want them to be after import.

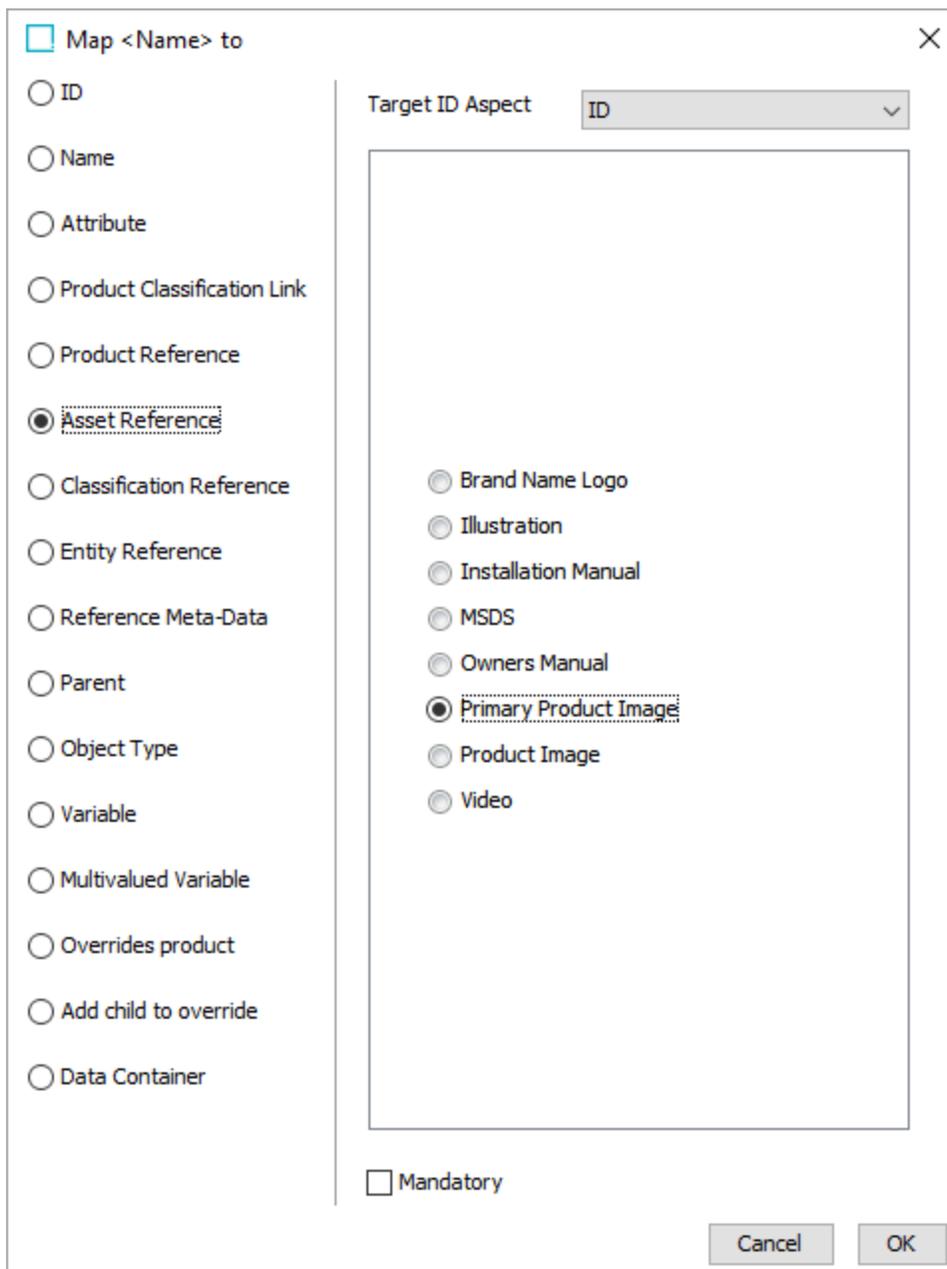
Note: If you only need to link a few assets to products, then it is more efficient to link them via the interface.

1. Go to **File** and select **Import**, then **Data**. An 'Import Manager' window will appear. On 'Select Data Sources', click the ellipsis button (...) next to 'Filename' and select your file.



2. Proceed to the 'Map Data' step. Select a source column and click the **Map** button. Map the column holding IDs to 'ID', map the column holding the asset to be referenced to 'Asset Reference'. After selecting the 'Asset

Reference' radio button, select the 'Primary Image' radio button. For more information on mapping, see **Inbound Map Data - Map** in the **Data Exchange** documentation.



Map <Name> to

ID
 Name
 Attribute
 Product Classification Link
 Product Reference
 Asset Reference
 Classification Reference
 Entity Reference
 Reference Meta-Data
 Parent
 Object Type
 Variable
 Multivalued Variable
 Overrides product
 Add child to override
 Data Container

Target ID Aspect:

Brand Name Logo
 Illustration
 Installation Manual
 MSDS
 Owners Manual
 Primary Product Image
 Product Image
 Video

Mandatory

Cancel OK

3. Click OK to close the Map To dialog.
4. If the image IDs were not found or the import file data was not done correctly, then columns will appear in red. For information on input files, see **Asset Reference - Map Inbound** in the **Data Exchange** documentation.

Note: If the image IDs were not found or the import was not done correctly, then columns will appear in red.

Import Manager
✕

Steps

1. Select Configuration
2. Select Data Source
3. Select Format
- 4. Map Data**
5. Identify Objects
6. Identify Destination
7. Select Business Rules
8. Advanced Settings

Map Data

Source:

<ID>	<Name>
18210	18210 M B
18212	18212 L B
18213	18213 M O

Result: Map to: Product ▼

ID=<ID> ✓	PrimaryProductImage AssetReference=<Name> ⛔
18210	18210 M B
18212	18212 L B
18213	18213 M O

Auto Map
Map
Constant
Remove
Transform
Generate Profile

Back
Next
Finish
Cancel

STEPXML Import

It is also possible to link the images to product via STEPXML import. The following code snippet, shows an example XML file shown below:

```
<?xml version="1.0" encoding="utf-8"?>
<STEP-ProductInformation ContextID="Context7" WorkspaceID="Main"
UseContextLocale="false">
  <Products>
    <Product ID="18210" UserTypeID="Item" ParentID="18209">
      <Name>18210 M B</Name>
      <AssetCrossReference AssetID="20584" Type="PrimaryProductImage"/>
    </Product>
  </Products>
</STEP-ProductInformation>
```

Classifications

This topic covers information specific to the Classification super type that is important to know when working with classifications. For general object maintenance information (applicable to all object types rather than specific to classifications), see the **All Objects** topic within this guide.

Classifications are used to build hierarchies and objects that bundle other objects into organized groupings. For example, images, manuals, and icons could be uploaded to STEP as assets and stored in appropriate subfolders under the 'Assets' classification folder. Product objects could also be linked into classifications to provide alternative categorizations of objects that vary from the product hierarchy structure.

Classification Editor

The primary editor for classification objects is the Classification tab.

Description	
Name	Value
ID	22586
Name	T-shirts and Sweatshirts
Object Type	Web Level 3
Revision	0.3 Last edited by USERY on Mon Dec 26 07:24:26 EST 2016
Approved	Last Approved on Mon Aug 08 10:59:21 EDT 2016
Translation	Not Translated
Path	Classification 1 root/Web Sites/Acme Retail Web Site/Apparel/Mens Casual/T-shirts and Sweatshirts
Visibility	
Landing Page Copy	abc

This tab will display all description attributes that are valid for the classification. Note that only description attributes are available on classifications (as opposed to products, which can also have specification attributes). More information on description attributes is available in the **Description Attributes** topic of the **System Setup / Super User Guide**.

Sub Products

When on a classification, the Sub Products tab is used to display objects of the product super type that are linked into the classification via Product to Classification links. When the selected classification does not have product children (e.g., classifications used to house assets or configurations), the Sub Products tab does not provide any meaningful information.

Tree

- Product Videos
- Configurations
- ETIM Hierarchy
- Index Words
- Merchandising Hierarchy
- Suppliers
- Web Sites
 - Acme Retail Web Site
 - Apparel
 - Mens Casual
 - Caps
 - T-shirts and Sweatshirts
 - 18207-012
 - 18214-012
 - 18215-012
 - 18217-012
 - 18217-054
 - Women's Apparel
 - Automotive
 - Building and Electrical Products

- Entity Root
- GDSN
- Publications
- Primary Product Hierarchy
- Collections
- eCatalogs
- Recycle Bin

T-shirts and Sweatshirts rev.0.3 - Sub Products

Classification | Sub Products | References | Referenced By | Images & Documents | Tables | Status | State Log | Tasks

View: Show all ▾

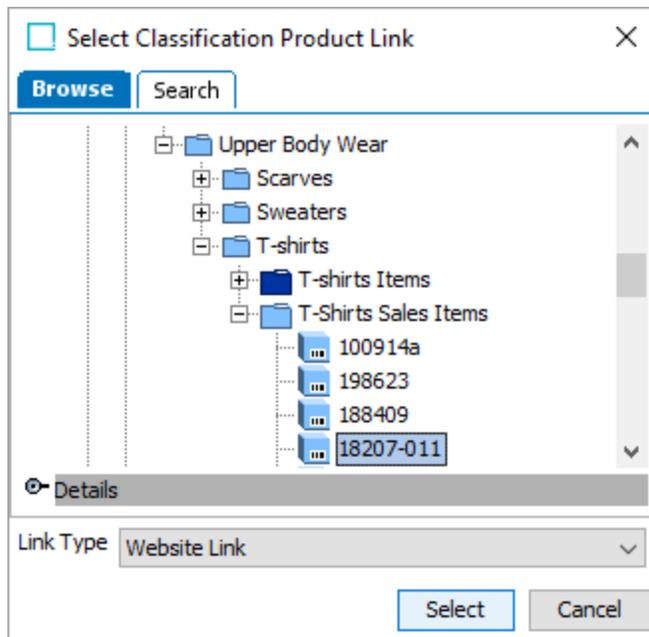
	18207-012	18214-012	18215-012	18217-012	18217-054
ID	18207	18214	18215	18217	100305
Name	18207-012	18214-012	18215-012	18217-012	18217-054
Object Type	Sales Item	Sales Item	Sales Item	Sales Item	Sales Item
Revision	0.2 Last edited by USER o...	0.3 Last edited by USERL ...	0.4 Last edited by USERL ...	0.3 Last edited by USERL ...	0.22 Last edited
Path	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product
Approved	✘ Last Approved on Mo...	✔ Approved or			
Translation	Not Translated	Not Translated	Not Translated	Not Translated	Not Translated
Completeness Score					
Category	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18207-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18214-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18215-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18217-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Swe 18217-054
Object Type	Sales Item	Sales Item	Sales Item	Sales Item	Sales Item
Parent	T-shirts	T-shirts	T-shirts	T-shirts	T-shirts
Product Variant Priority					
Released by					
Status					
URL					

[Add Product](#)

Data can be edited on the products linked into a classification from the Sub Products tab by clicking directly into any editable field. Standard editing capabilities are available within this interface (as described in the **Editing Objects in Tree** topic within this guide), including copy / paste functionality using Ctrl + C and Ctrl + V. Right-clicking on any field within the table will expose additional options, including Copy, Paste, Hide Equal, and Mark Different selections - all of which are self-explanatory and can be especially useful when editing multiple objects.

Selecting **Remove Product** deletes the product to classification link between the objects, but does not delete the product itself.

Selecting **Add Product** opens a dialog allowing the user to browse hierarchies to select a product to link, as well as specifying the link type to be applied.



Note that the same functionality is available using the **Add Product** link at the bottom of the Sub Products editor.

References

The References tab is where all references of which the selected object is the source can be viewed and edited (assuming proper privileges are in place). In addition, if the object has privileges applied, has objects visible in other contexts, or has any linked attributes, that information can be viewed (and in some cases edited) on this tab.

The display of the References tab on a classification will vary slightly from system to system, based on the data model. If the selected object has classification reference types for which the object is a valid source, those will appear on this tab, in addition to the default flipper options.

The screenshot shows the 'References' tab for 'T-shirts and Sweatshirts rev.0.5'. The interface is divided into a left-hand tree view and a main content area. The tree view shows a hierarchy starting from 'Entity Root' down to 'T-shirts and Sweatshirts' with sub-items like '18214-012', '18215-012', '18217-012', and '18217-054'. The main content area has several sections:

- 1. Display:** A table with columns for Reference Type and Target. A '+' icon is used to add a reference.
- 2. Ungrouped Classification References:** A table with columns for Reference Type and Target. A '+' icon is used to add a reference.
- 3. Applied Privileges:** A table with columns for Applies to, Action Set, Attribute Group, Object Type, Group, Language, and Country. A table entry shows 'T-shirts and Sweatshirt' linked to 'Classify Products' for 'Merchandise Managers' in '<ANY>' language and country.
- 4. Visible Objects in Other Contexts:** A section titled 'No Visible Objects in Other Contexts'.
- 5. Attributes:** A table with columns for ID, Name, Attribute Groups, Mandatory, and Inherited from. A table entry shows 'Color' as an attribute with 'Apparel' as the inherited from.

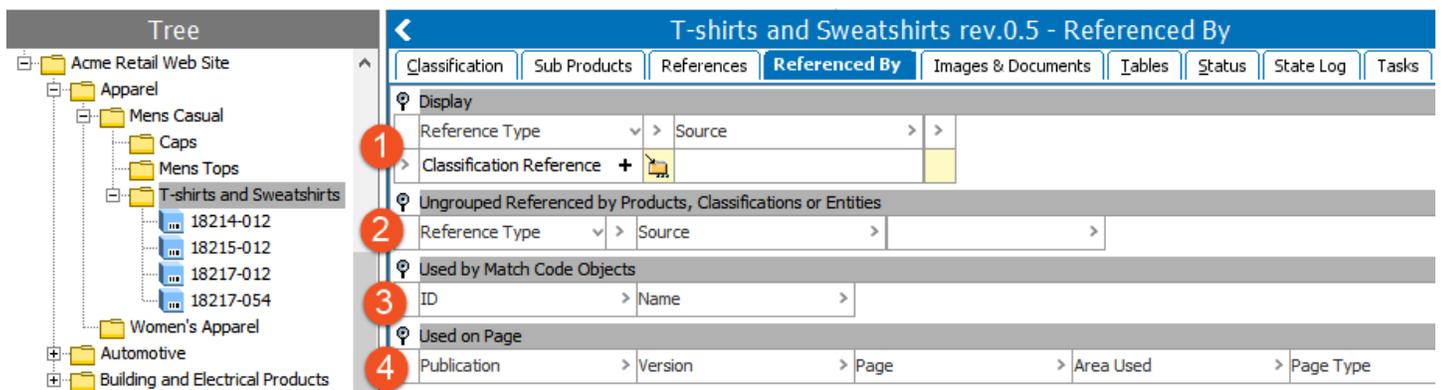
- 1. Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created to the object selected in the dialog from the currently selected object that you are standing on (e.g., current object = source, dialog selection = target). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the **Reference and Link Types** topic in the **System Setup / Super User Guide**.
- 2. Ungrouped Classification References:** The functionality is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes. If *all* references that are valid for the selected object have been placed in attribute groups, the **Ungrouped Classification References** flipper will not be present.
- 3. The Applied Privileges flipper** allows users to apply privileges to the selected classification. Detailed information on creating and editing privileges is available in the **Privilege Rules** section of the **System Setup / Super User Guide**.
- 4. The Visible Objects in Other Contexts flipper** displays subproducts that are visible in another context, which is only applicable if classification hierarchies have been set to be dimension-dependent in System Settings. See the **Classification Hierarchy Settings** topic in the **System Setup / Super User Guide** for detailed information.
- 5. The Attributes flipper** allows the user to view attributes linked to the classification, as well as to add new links using the **Link to Attribute** link. When attributes are linked to a classification, they are available to be populated on any objects of the product super type that reference the classification (assuming the attributes are also made valid on the applicable product object type). The exact columns available will depend on the data model and the attributes that have been made valid on the attribute links. Whether or not the various attributes are editable will also depend on the setup of the data model. However, an ID and Name field are always shown, with the attribute name being a hyperlink that can be used to navigate directly to the attribute. An Attribute Groups column is also present, displaying the attribute group(s) that the attribute is in. A Mandatory column is present and if checked, product objects that reference the classification cannot be approved until a

value has been provided for the attribute. Note that mandatory settings on the attribute itself apply globally, while mandatory settings on the attribute link apply only to product objects that reference the classification at which the attribute is linked (or reference a classification that is inheriting the link). More information on mandatory settings is available in the **Mandatory Attributes** topic in the System Setup / Super User Guide. If the attribute link is inherited (indicated by a green down arrow, , in the row indicator), the 'Inherited from' column will display the parental node where the attribute has been linked, which is hyperlinked for easy navigation. More information on linked attributes is available in the Inheritance in the **Product Hierarchy** topic within this guide and in the **Attribute Links** topic in the **System Setup / Super User Guide**.

Referenced By

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). In addition, if the object is used by a match code or is used by any publication, that information can be viewed on this tab.

The display of the Referenced By tab on a product will vary slightly from system to system, based on the data model.



The screenshot shows the 'Referenced By' tab for 'T-shirts and Sweatshirts rev.0.5'. The interface includes a tree view on the left and a main table area. The table is divided into four sections, each with a flipper icon (a circle with a plus sign) and a title:

- Section 1: Display** (highlighted with a red circle 1). It contains a table with columns for 'Reference Type' and 'Source'. A plus sign (+) is visible next to 'Classification Reference'.
- Section 2: Ungrouped Referenced by Products, Classifications or Entities** (highlighted with a red circle 2). It contains a table with columns for 'Reference Type' and 'Source'.
- Section 3: Used by Match Code Objects** (highlighted with a red circle 3). It contains a table with columns for 'ID' and 'Name'.
- Section 4: Used on Page** (highlighted with a red circle 4). It contains a table with columns for 'Publication', 'Version', 'Page', 'Area Used', and 'Page Type'.

- 1. Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the **Reference and Link Types** topic in the **System Setup / Super User Guide**.
- 2. Ungrouped Referenced by Products, Classifications or Entities:** The functionality is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
- 3. Used by Match Code Objects:** If the selected object is the Category indicated in a match code, the match code will display. For example:

Definition	
Name	Value
ID	FindSimilar
Name	Find Similar
Last edited by	2017-01-24 12:34:34 by USER6
Category	T-shirts and Sweatshirts (22586)
Match Code Window Size	1

Used by Match Code Objects		
ID	Name	Edited by
FindSimilar	Find Similar	2017-01-24 12:34:34 by USER6

More information on match codes is available in the **Matching, Linking, and Merging** documentation.

4. **Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the **Publication Hierarchy** section of the **STEP Publisher** guide.

Images & Documents

The Images & Documents tab displays all assets that are child to the selected classification (e.g., all assets that are housed within that classification). Note that assets can be tied to classifications in two ways: as child products, or via image and document references. Assets are typically referenced to classifications only when the classification contains non-asset children for which the asset is relevant. In any case, assets referenced to classifications are *not* visible on the Images & Documents tab. This is in contrast to how the same tab functions for products, where the tab displays all assets referenced to the selected product. However, for the displayed assets (those that are child to the classification), the functionality available for interacting with the assets is the same as what is available for referenced assets on a product, which is described in the **Images and Documents Tab** topic in the **Products** section of this guide.

Tables

The Tables tab allows users to view and edit the tables defined for the object. Tables are generally used to present consolidated data across multiple objects, such as object name, part number, and price. For more information, see the **Tables** guide.

Status

The Status tab provides information about the status of the object, including revision history, translation status, and approval status. Products and classifications share a common Status tab, which is described in the **Status Tab** topic in the **Products** section of this guide.

State Log

The State Log tab displays the history of the selected object across all workflows. If the object has ever been in a workflow, a flipper is displayed per workflow and the history of transitions of the object within that workflow can be viewed. Detailed information on the State Log tab is available in the **State Log Tab** topic in the **Workflows** guide.

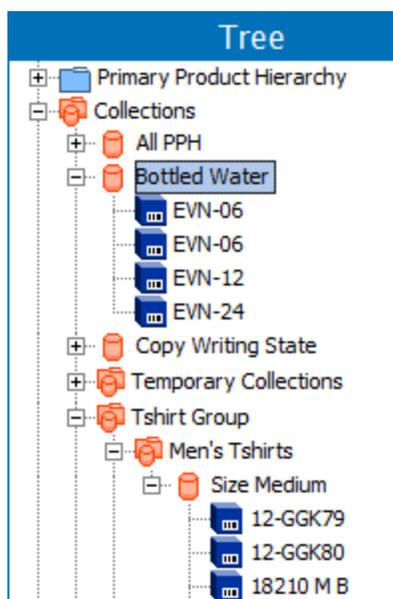
Tasks

The Tasks tab displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** guide.

Collections

Collections provide a valuable tool for data maintenance tasks. Collections are containers for storing sets of objects from Tree and System Setup, independently of their placement in the hierarchies. A collection can be created via a search or import, and all objects in a collection can be updated at the same time. Collections and collection groups are found in the Collections hierarchy on the Tree tab.

When multiple collections need to be grouped together, they can be put into a 'collection group'. Collection groups can also hold other collection groups. See **Creating Collections** or **Creating Collection Groups** in this documentation for more information on each topic.



For more on data maintenance of collections and collection groups, see the **Maintaining Collections** topic.

Temporary Collections

The Temporary Collections node is system-generated to store read-only collections created by a process, such as bulk update background processes, exports, profiles, and Web UI basket. The right-click menu on this node does not allow manual creation of new user collections nor deletion of existing temporary collections.

Temporary collections created by background processes (BGPs) are deleted automatically via the case-sensitive sharedconfig.properties file entry **AutoDeleteBackgroundProcesses.AgeInHours.[processname]=[hours]** when the BGPs are deleted. In this setting, the *[processname]* designation is replaced with the name of the BGP and the *[hours]* designation is how long to wait before deleting BGPs. For more information on this setting property, see the **Create a Background Processes Maintenance Plan** topic within the **System Administration** documentation.

For example, running a bulk update BGP creates three temporary collections. Setting the `AutoDeleteBackgroundProcesses` property with 'BulkUpdate' as `[processname]` allows the related bulk update temporary collections to be deleted when the bulk update BGPs are deleted, based on the `[hours]` setting.

Manually deleting temporary collections is necessary when background processes have been manually deleted. On the Maintain menu, click 'Force Delete & Purge' and select one of the following options:

- 'Purge collection contents' - removes the contents of the collection but does not remove the root node.
- 'Purge collection node' - removes the contents of the collection and also deletes the collection root node.

Dimension Dependency and Collections

Collections and search results are dimension dependent. A search in one context can display different objects than the same search in another context.

The following example illustrates how creating a collection from search results can return different objects, based on the dimension dependent values in the context being searched.

This search is performed in the 'English US' context for the value 'red' in the 'Color (Color)' attribute. The search finds four objects with the value.

Context: English US

Search: Color (Color) = Red

Advanced

Reset Search

Displaying 4 of 4 results Show Details

Name	ID	Color
12-GGK80	182922	Red
Mens T PBG	179916	Red
Mens T POY	MT18404	Red
Womens T POY w Class	179928	Red

One of those objects has a translated value of 'rojo' for the language dimension point in the 'US Spanish' context. the other objects have no value for the attribute.

12-GGK80 rev.0.9 - Compare Contexts 22% complete

Compare Contexts References Referenced By

View: Color

	English US	English Canada	English UK	US Spanish
ID	182922	182922	182922	182922
Name	12-GGK80	12-GGK80	12-GGK80	12-GGK80
Color	Red	Red	Red	Rojo

Performing the search again in the 'US Spanish' context returns no records since the value of 'red' does not exist for any of the records in the searched context.

The screenshot shows the STIBO SYSTEMS search interface. At the top, the 'Context' is set to 'US Spanish'. The search criteria are 'Color (Color) = Red'. The search results show '0 hit(s)'. The interface includes a search bar, a search button, and a search result profiling section.

Context: US Spanish

Search: Color (Color) = Red

Advanced

Reset Search

Displaying 0 of 0 results Show Details

Name

Search Result Profiling

0 hit(s)

Creating Collections

In workbench, collections can be created in two ways:

1. Using the Search tab, perform a search, and create a collection of the results
2. Using an import file, create a collection of the contents

Regardless of how they are created, if a collection contains less than 10,000 objects, these can be inspected in the Tree hierarchy by expanding the Collection node. The collection will be displayed in an entirely flat structure regardless of any parent-child relations that may exist between the objects, and regardless of which parents / children the objects have when viewed elsewhere in STEP.

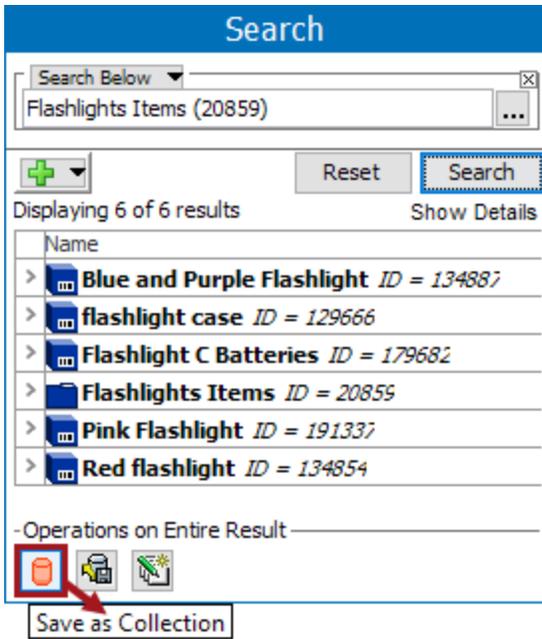
Note: While this topic and the Collections section do not address Web UI functionality, it is important to note that the Web UI Collection Content Screen also has the same 10,000 object restriction to allow for the best performance.

In Web UI, objects can be manually added to and removed from a collection. This functionality is not available in the workbench.

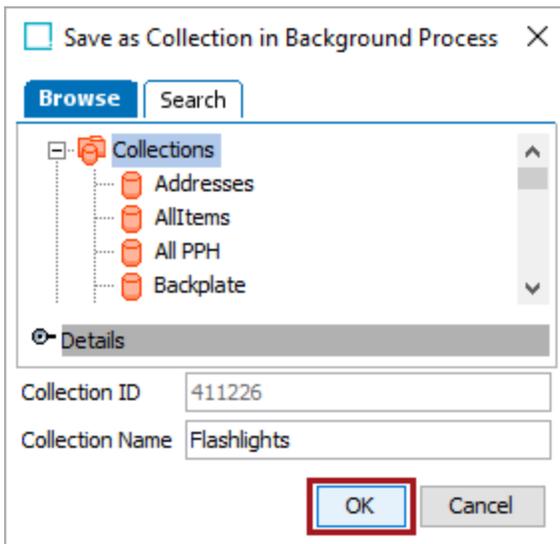
Creating a Collection from Search

The most common way to create a collection is through creating a search. To do so, follow the steps below.

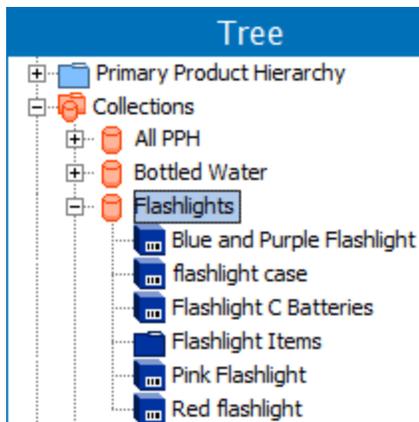
1. Navigate to the Search tab, enter in the needed search criteria, and click Search to verify the results. For more on how to search, see the **Navigating and Searching** topic in the **Getting Started / User Guide** documentation.
2. Click the **Save as Collection** button.



3. Select the appropriate parent in the collections hierarchy (either the top collections folder itself, or a collections group folder), enter a collection name (the ID is autogenerated), and click OK.



4. A background process runs, and the new collection is created and saved under the specified folder.



5. Right-click the collection, and run any needed bulk update, or export the objects.

Note: The initial search criteria used to locate the included objects is stored on the collection, which allows for later updates of the collection. To learn more about editing searches to update collections see the **Maintaining Collections** topic.

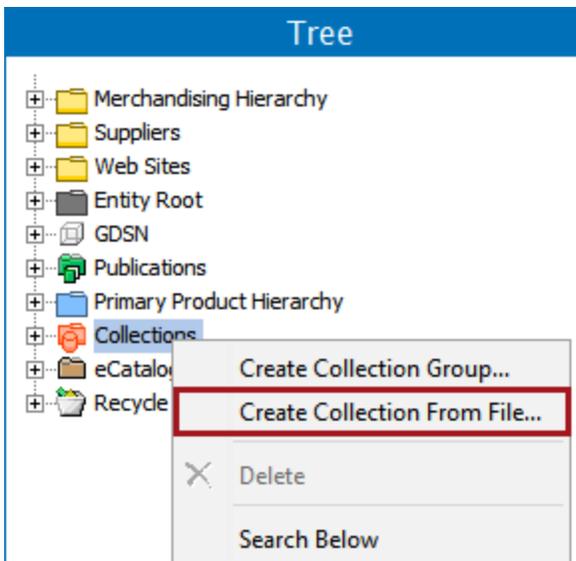
Creating a Collection from File Import

Collections can be created from a text or CSV import file containing STEP IDs of products, assets, or classifications. Objects in the import file must already exist in STEP as the import will not create or update objects, only place them in a collection.

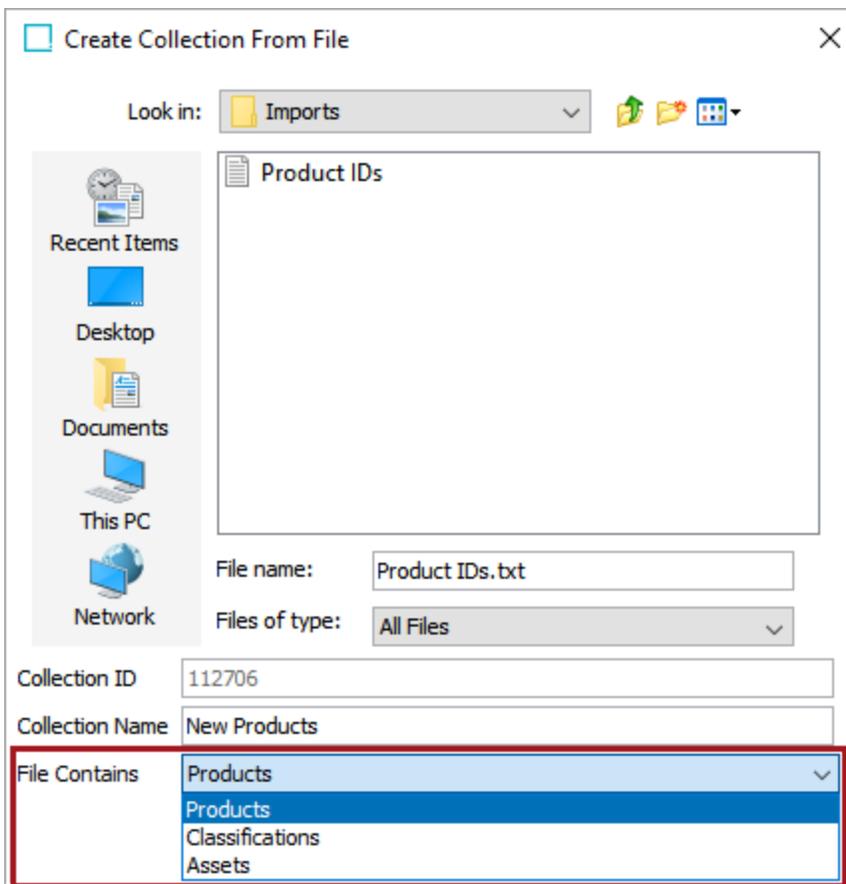
Important: If the import file includes only attribute values or unique keys of the products, assets, or classifications to be added to the collection (and does not include the STEP ID), you must use the above steps for **Creating a Collection from Search**.

To create a collection from a file:

1. In the Tree, right-click the Collections top node or a collection group to determine where the new collection will be saved, and select **Create Collection From File...**



2. In the **Create Collection From File** dialog, locate the file to be imported.



The **Collection ID** is autogenerated

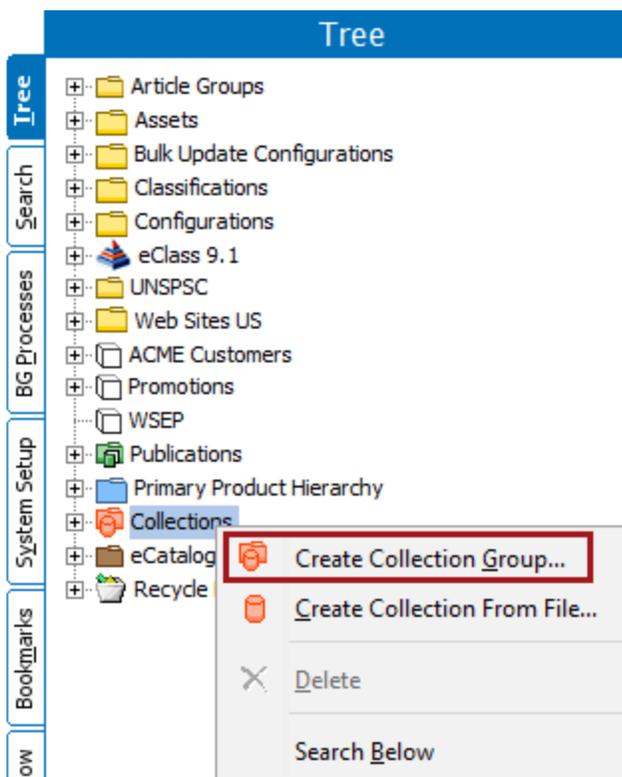
3. For the **Collection Name** parameter, add a Name for the new collection.
4. For the **File Contains** parameter, select if the import file contains IDs of products, classifications, or assets.
5. Click **OK** to start a background process which will create the new collection.

Creating Collection Groups

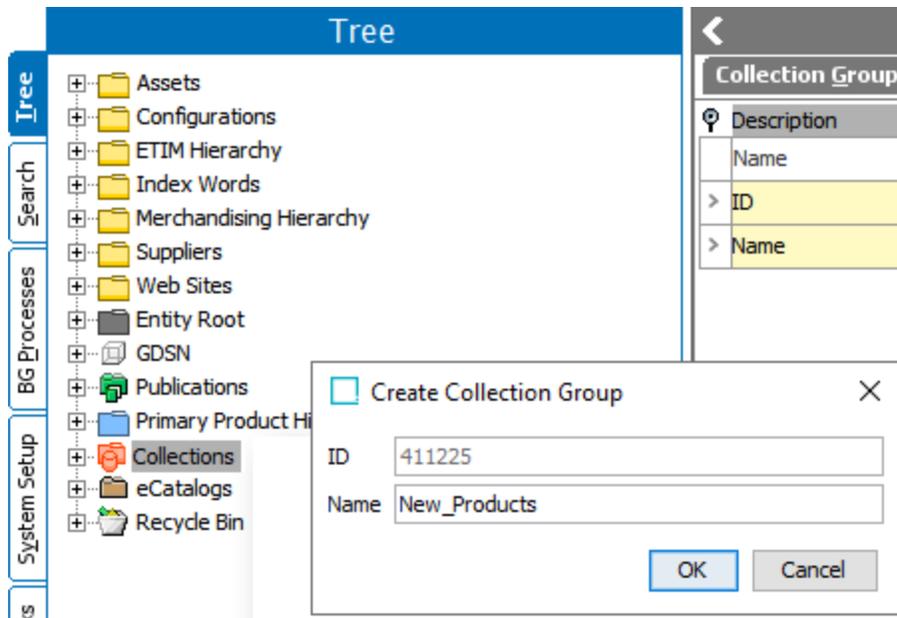
Collection groups are containers that can hold collections or other collection groups. Below are instructions for configuring collection groups.

Creating a Collection Group

1. Depending on where you want the collection group to live, either right-click the top-level Collections node or an existing collection group in Tree and select **Create Collection Group...**

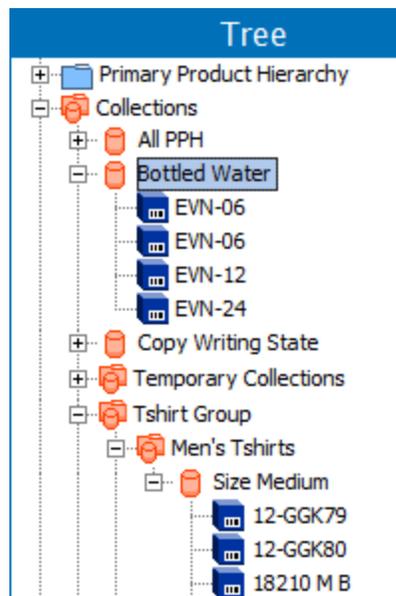


2. In the 'Create Collection Group' dialog enter a **Name** (ID is autogenerated) for the new group.



3. Click **OK**.

Once created, collection groups can be selected to hold new collections, or more collection groups can be created under them. For more on how to create collections, see **Creating Collections** in this documentation.



Maintaining Collections

Collections can be a valuable tool for data maintenance tasks, because they allow a user to group objects independently of their placement in the hierarchies, and they can be updated. As an example, a set of objects with data anomalies could be grouped in a collection via search criteria. Once the data is corrected, the objects with updated information no longer meet the search criteria. Thus updating the collection automatically removes any updated / fixed objects from the collection. In this way, only the objects that still need to be fixed are displayed in the collection.

This topic addresses the various ways users can interact with and maintain collections.

- Delete
- Edit Search Criteria
- Export Data Below
- Refresh Data
- Run Bulk Update
- Republish
- Search Below

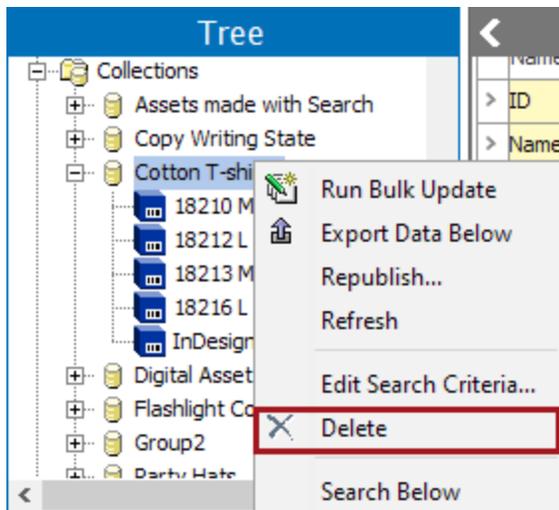
Collections can also be maintained via the Web UI. For more information, see the **Collection Content Screen** section of the **Web User Interfaces / Web UI Getting Started** documentation.

Delete

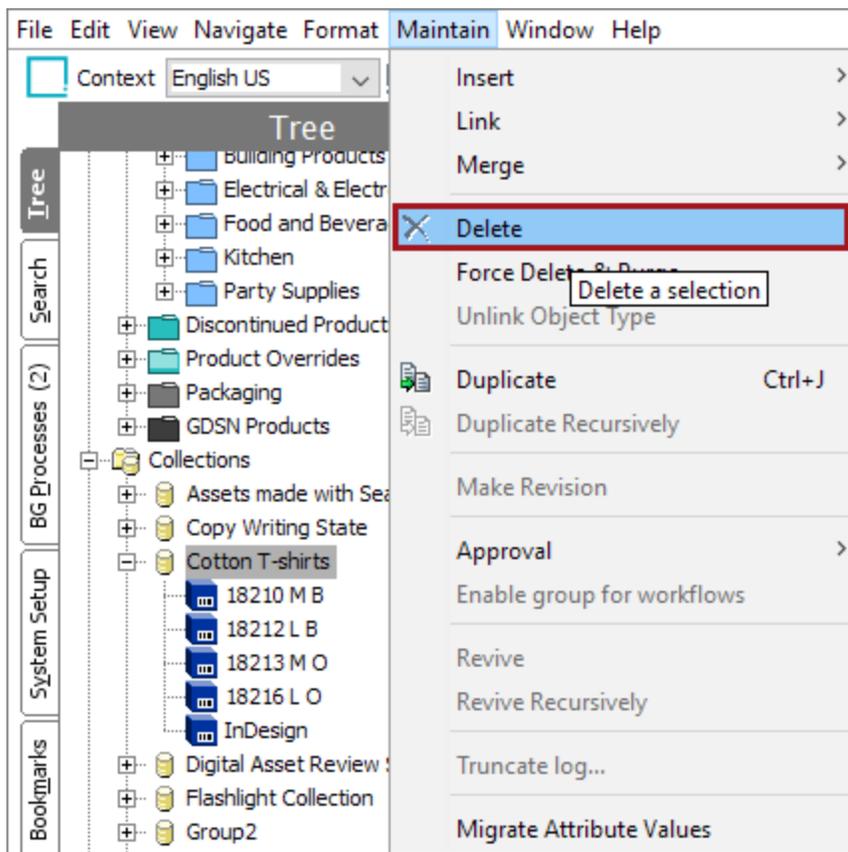
Clicking on the Delete option deletes the Collection node, but does not delete the objects within the Collection. They will still reside under their original nodes in Tree and System Setup. All collections and collection groups below a collection group must be deleted before the parent collection group can be deleted.

Important: If an object is deleted from the collection, then the same object will be deleted from the original hierarchy placement in STEP as well. In this case, it would be best to just updated the collection through proper maintenance of collections such as through an updated search or a bulk update.

To delete the collection node, right-click on the desired collection and select **Delete**.



Additionally collections and collection groups can also be deleted from the Maintain menu, **Delete** option.



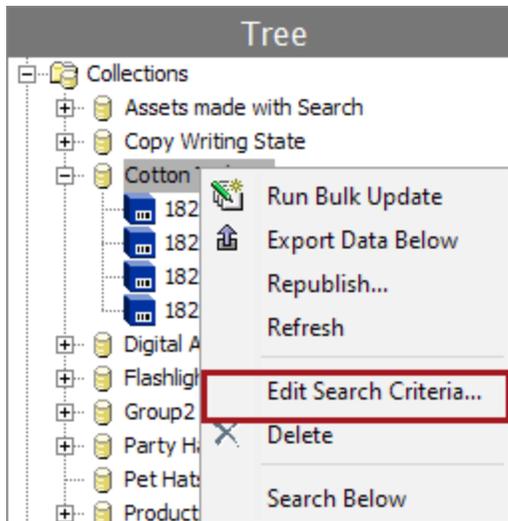
For more on creating searches, see the **Navigating and Searching** documentation.

For more on how to use bulk updates, see the **Bulk Updates** documentation.

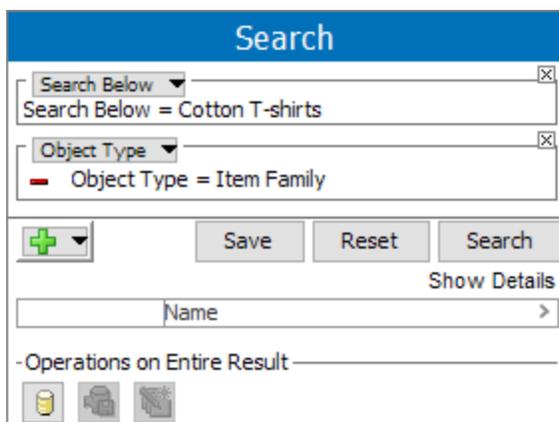
Edit Search Criteria

Collections created from searches can be edited if needed to reflect the needed objects in the collection.

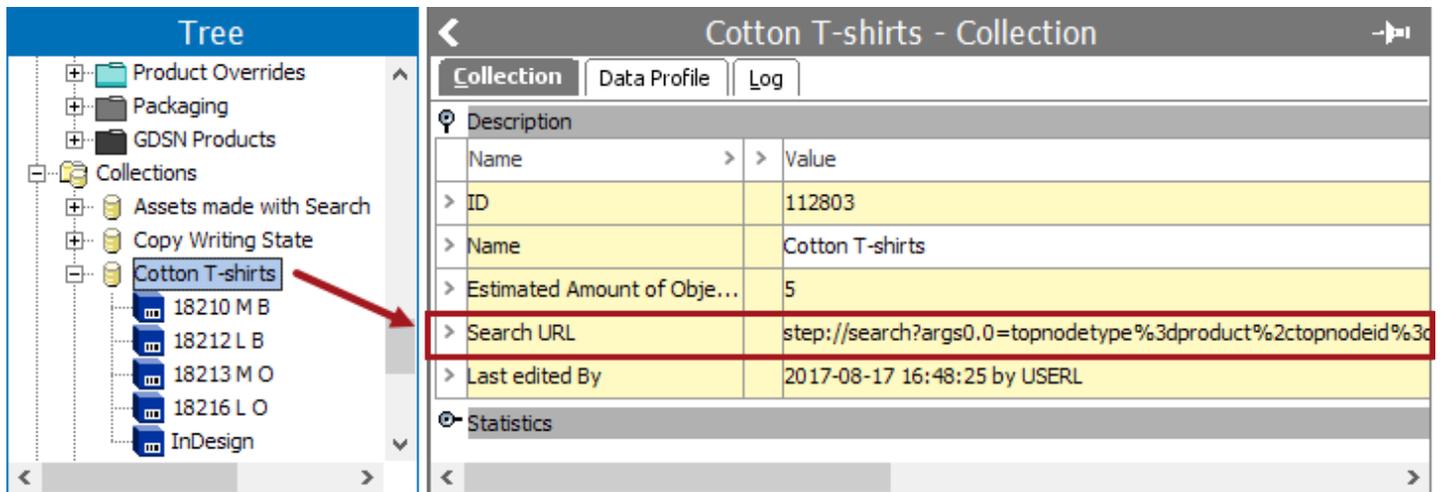
1. To do so, right-click on the collection and select **Edit Search Criteria**.



2. Once selected, the user will be brought to the Search tab where they can see the original search criteria, and modify the search criteria if necessary.



Alternatively, if a collection was created using a search criteria, the 'Search URL' will appear in the collection's Description flipper under the Search URL field. The user just needs to copy and paste this information into a browser, and they will be brought to the Search tab with the original search criteria on it where they can make adjustments if needed.

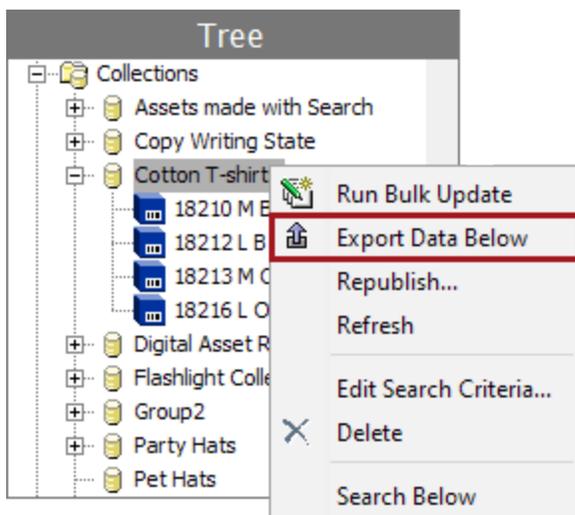


For more information on searches, see the **Navigation and Search** topic in the **Getting Started / User Guide** documentation.

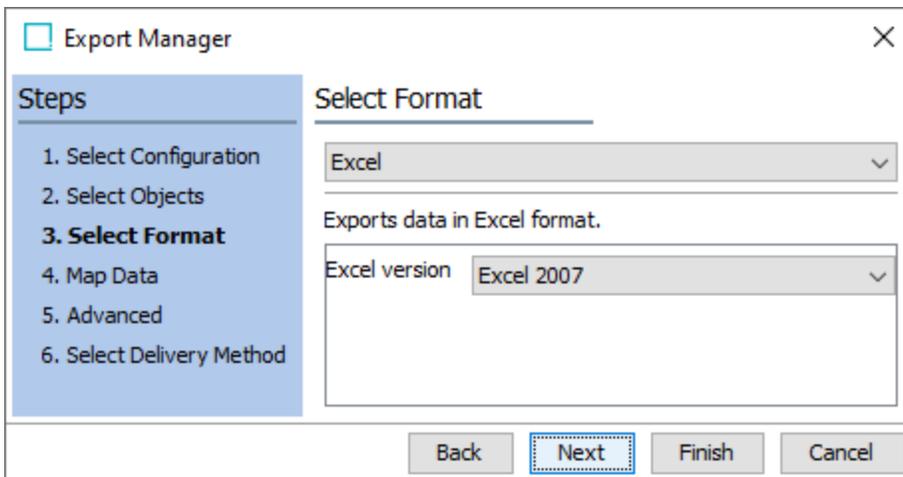
Export Data Below

The Export Manager wizard allows a user to export data on demand and to create or modify an export configuration.

1. If a user wishes to export all objects in the selected collection based on the selected format and the mapped data, they can right-click on the collection and select Export Data Below.



2. Selecting this option will launch the Export Manager where a user can fill out the proceeding steps as needed.

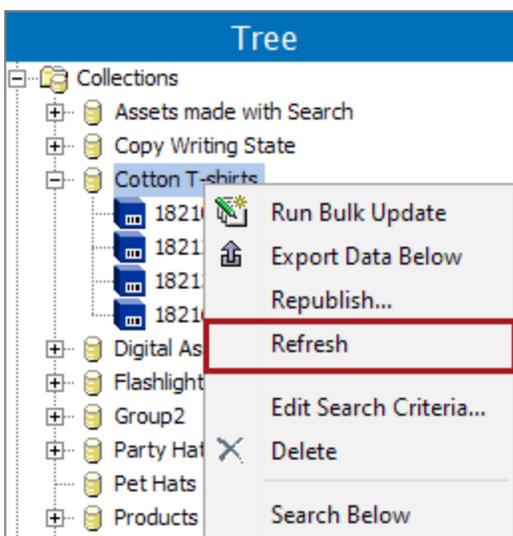


For more information on exporting, see the **Creating a Data Export** topic in the **Data Exchange** documentation.

Refresh Data

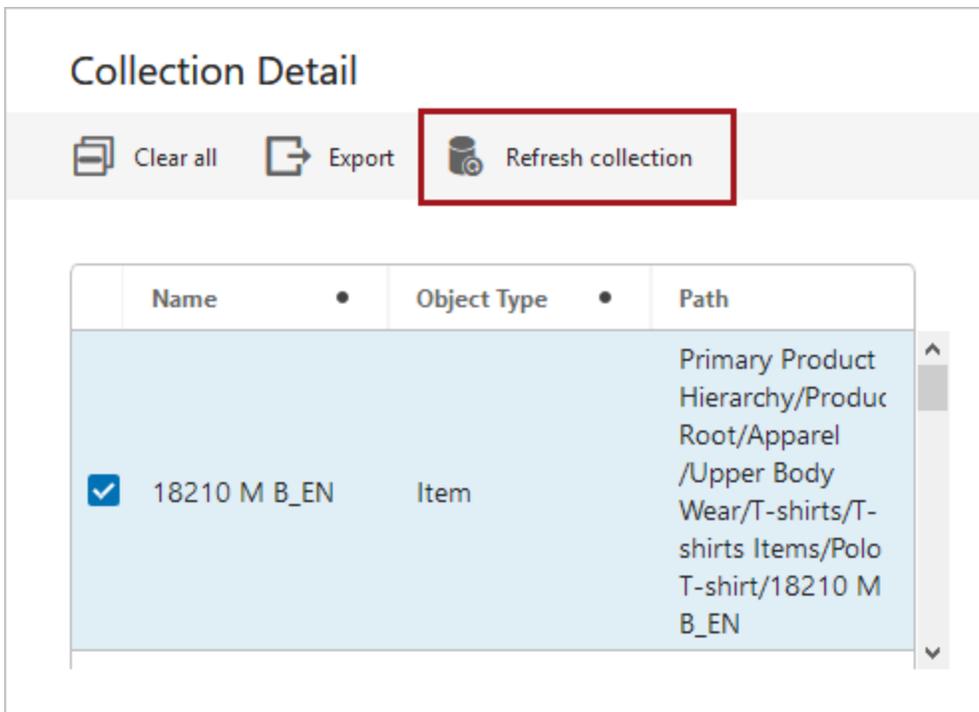
Collections created from search results can be updated for the most up-to-date information and object groupings, as objects in a collection that no longer meet the search criteria will be removed from the collection.

- To start a refresh in workbench, right-click on the collection and select **Refresh**.



Note: The 'Refresh' option is *Only* available if the collection is created from a search.

- To start a refresh in Web UI, go to the collection content screen, select the desired collection, and click the **Refresh collection** action.

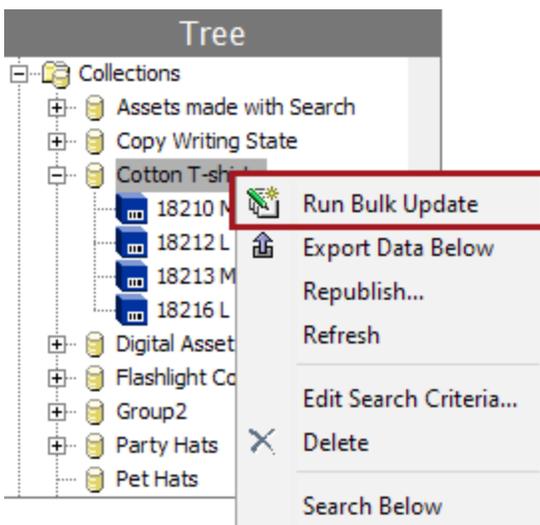


Note: For more on how to setup a refresh in Web UI, see the **Scheduling a Collection Refresh in Web UI** topic in the **Bulk Updates** documentation.

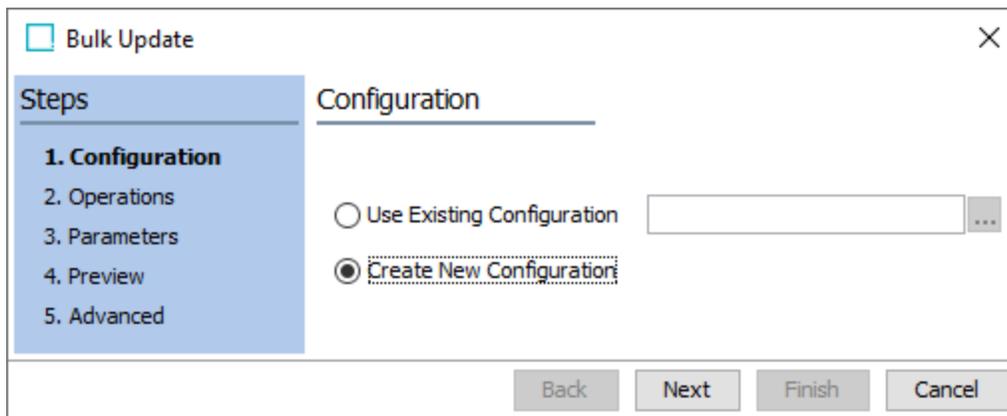
Run Bulk Update

This option allows the user to interact with the objects in the collection in a number of ways. To name a few, the objects could be submitted into a workflow, assigned to a user group, or have an attribute updated.

1. Right-click the desired collection and select Run Bulk Updates.



2. Complete the steps in the Bulk Update wizard to make the same updates to all objects in the collection.



For more on how to use the bulk update wizard, and the various operations that can be applied to collections or a group of collections, see the **Bulk Update** documentation.

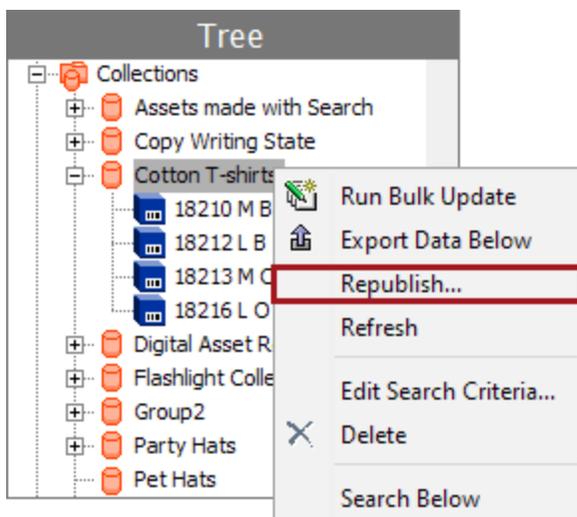
For information on how to schedule bulk updates for collections in Web UI, see the **Scheduling a Collection Refresh in Web UI** topic in the **Bulk Updates** documentation.

Republish

The Republish action generates events on products, classifications, or assets in the collection. Common setup is to use this option for on-demand creation of a republished event. For example, to generate events for all objects in a collection that has never been published by an event queue.

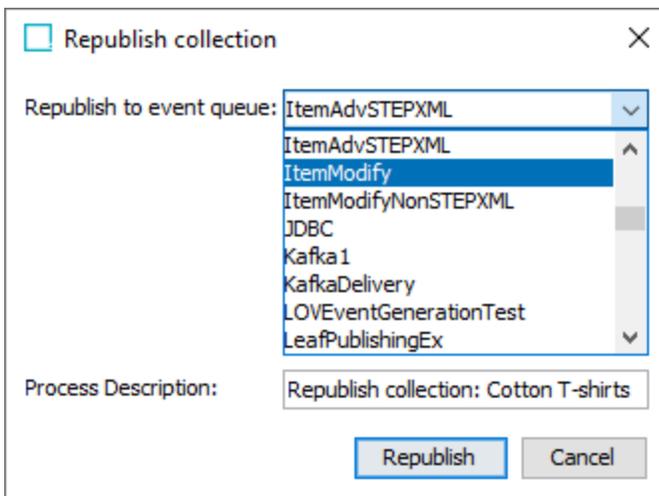
For more information on events, see the **Events** topic in the **System Setup / Super User Guide** documentation.

1. To republish an event, right-click on the desired collection and select **Republish...**

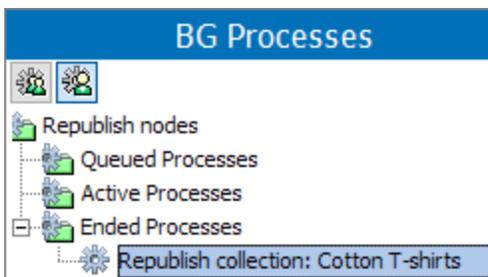


Note: Users must have the privilege to maintain event queues in order to use this action.

- Clicking the action launches a wizard where users can choose the appropriate event queue from the dropdown menu.



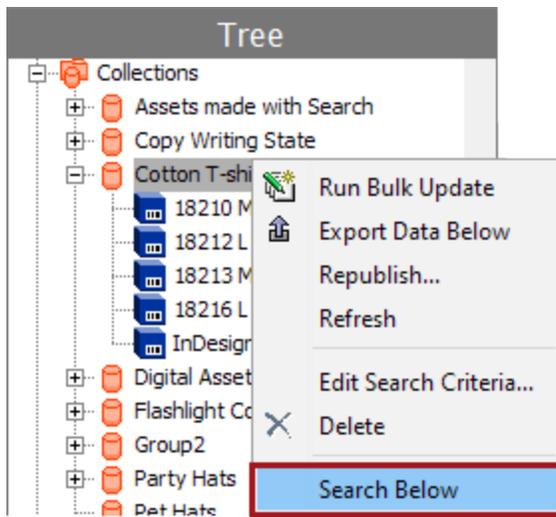
- Users can also enter in a Process Description to give a name to the background process, which can be monitored in the 'Republish Node'.



Search Below

If a certain attribute on some of the items in the selected collection needed to be changed, a user could use this to locate the items.

When a user right-clicks on a collection and selects **Search Below**, it allows the user to search only the items in that particular collection.



See the **Navigating and Searching** topic in the **Getting Started / User Guide** documentation.

Collection Properties and Statistics

Working with and viewing the collections properties, collection statistics, Data Profile tab, or the Log tab can provide a quick overview of the collection itself, and useful information in regards to the objects it holds.

Collection Tab

The Description and Statistics flippers provide information about the selected collection. Below the flippers are described in more detail.

The screenshot shows the 'Products with Assets - Collection' details page. The left pane shows a tree view with 'Products with Assets' selected. The main pane has tabs for 'Collection', 'Data Profile', and 'Log'. The 'Description' section contains a table with the following data:

Name	Value
ID	114506
Name	Products with Assets
Estimated Amount of Obj...	28
Search URL	step://search?args0.0=topnodetype%3dattributegroup%2ctopnodeid%3dAttribute
Last edited By	2016-12-05 09:36:43 by USERL

The 'Statistics' section shows:

- Collection Content:** 28 object(s). Notice: Objects in Collection may be hidden in Tree due to Context/Workspace visibility and/or privilege ch
- Content by Object Type:**
 - Product (10):**
 - Item (4)
 - Item4 (2)
 - Item5 (1)
 - Item2 (1)
 - Item3 (1)
 - Item Folder (1)
 - Attribute (17)**
 - Special types (1):**
 - Attribute Group (1)

Description Flipper

This displays information about the collection:

Party Hats - Collection		
Collection	Data Profile	Log
Description		
Name	Value	
> ID	111807	
> Name	Party Hats	
> Estimated Amount of Obj...	4	
> Search URL	step://search?args0.0=topnodetype%3dproduct%2ctopnodeid%3d121189&search0.0=BelowCriteria	
> Last edited By	2016-08-22 11:53:40 by USER8	

- **ID:** Shows the collection ID, which is auto generated.
- **Name:** Shows the name of the collection.
- **Estimated Amount of Objects:** Displays the total number of objects in the collection based on the latest 'Refresh' of the collection. The count is not filtered according to Context / Workspace visibility, privilege checks, or object types.
- **Search URL:** Displays *only* on collections created from a search result. A user can copy the URL, paste it into the URL field, press ENTER, and see the search in the Search tab. It is possible to edit the search if needed. For more on searching see the **Navigating and Searching** topics in this documentation.
- **Last edited By:** Displays the date and time and user who last worked on the collection.

Statistics Flipper

The Statistics flipper gives an overview of which type of objects are included in the selected collection.

Tree

- PECHATS
- Products with Assets
 - 114413
 - 20801
 - 20803
 - 20803-03
 - 20805
 - 444443
 - 4444441
 - 4444446
 - 444445
- Hats and Caps Iter
 - (AttributeGroup)
 - (AttributeN)
 - (AttrSize)
 - (AttrTShirtSize)
 - (AttWithLangDepl)
 - (Color, Interior)
 - (Hazmat)
 - (HazmatYN)
 - (Marketing Descrip)
 - (ReferenceAttribut)
 - (ReleasedBy)
 - (SellingPrice)
 - (ShippingRestrictio)
 - (Size)
 - (Value2)
 - (Value3)
 - Condition Attribute
 - Value 1

Products with Assets - Collection

Collection | Data Profile | Log

Description

Name	Value
ID	114506
Name	Products with Assets
Estimated Amount of Obje...	28
Search URL	step://search?args0.0=topnodetype%3dattributegroup%2ctopnodeid%3dAttributeGroup
Last edited By	2016-12-05 09:36:43 by USERL

Statistics

Collection Content

28 object(s)
 Notice: Objects in Collection may be hidden in Tree due to Context/Workspace visibility and/or privilege checks

Content by Object Type

Product (10)

- Item (4)
- Item4 (2)
- Item5 (1)
- Item2 (1)
- Item3 (1)
- Item Folder (1)

Attribute (17)

Special types (1)

- Attribute Group (1)

In addition to breaking down the objects by type, it will also display the exact number of objects in the entire collection based on the latest 'Refresh' of the collection.

Note: While actually viewing the collection in Tree, it may appear that there are fewer objects in the collection than what is reported by the Estimated Amount of Objects field under the Description flipper or the total objects reported under the Statistics flipper. Examples of why this may happen could be because some objects are not approved for the workspace the user is currently in, and thus do not show, or it could be due to privileges.

Data Profile Tab

The Data Profile tab can display a dashboard to provide a graphical representation of the objects that are in the collection. This can be modified based on the user's requirement.

Tree

- Primary Product Hierarchy
 - Collections
 - All PPH
 - Backplate
 - Baskets
 - Bottled Water
 - EVN-06
 - EVN-06
 - EVN-12
 - EVN-24
 - Collection XLS
 - CommDataList
 - CommDataProducts
 - Copy Writing State
 - Cotton Shirts with DK D
 - Data Quality Collection
 - Digital Asset Review Sta
 - Flashlights
 - Hats
 - Hats & Caps
 - OrderProcess2
 - Sample Search Collectio
 - Shoes
 - Temporary Collections

Data Profile

Collection | **Data Profile** | Log

Generated: Mon Nov 28 2016 14:24 [Update Profile](#)

Dashboard Value Details Reference Details

Object Count

4

objects

Translation Status

■ Not Translated (4)

Least Complete Attributes

Attribute	Completeness
Harmonization ...	0%
Discontinued	0%
Product Name	0%
Width (range)	0%

Approval Status

■ Partly Approved (3)
■ Not Approved (1)

Most Complete Attributes

Attribute	Completeness
Selling Unit of ...	100%
Manufacturer ...	100%
Country of Origin	100%
Brand Name	100%

Object Type Count

■ Item (4)

If a profile has never been created, a user can click on the **Generate Profile** link to create the collection's Dashboard.

Collection | **Data Profile** | Log

[Generate Profile](#)

Dashboard Value Details Reference Details

If it has already been created, it is recommended to update the profile when viewing if it has not been updated recently.

Collection | **Data Profile** | Log

Generated: Mon Nov 28 2016 14:24 [Update Profile](#)

Dashboard Value Details Reference Details

For more information on how dashboards and data profiling work, see the **Data Profiling** documentation.

Log Tab

The Log displays details about the creation and modification of the collection, details about which user performed what actions, and the number of objects in a collection when a collection is refreshed.

Tree	← Bottled Water - Log
<ul style="list-style-type: none"> Primary Product Hierarchy <ul style="list-style-type: none"> Collections <ul style="list-style-type: none"> All PPH Backplate Baskets Bottled Water <ul style="list-style-type: none"> EVN-06 EVN-06 EVN-12 EVN-24 	<div style="background-color: #0070c0; color: white; padding: 2px; display: flex; justify-content: space-between;"> Collection Data Profile Log </div> <p>Showing page 1 of 1</p> <p>2016-09-15 15:14:45 'USERJ': Created</p> <p>2016-09-15 15:14:45 'USERJ': Name modified from 'null'</p> <p>2016-09-15 15:14:45 'USERJ': Collection refreshed, number of objects: 4</p> <p>2016-11-23 15:25:24 'USERL': Collection refreshed, number of objects: 4</p>

Entities

This topic covers information specific to the Entity super type that is important to know when working with entities. For general object maintenance information (applicable to all object types rather than specific to entities), see the **All Objects** topic within this guide.

A STEP entity can be any object not defined as a product. Entities are commonly used to model customer-related data, such as contacts, addresses, markets, or customers, though they can be used for any number of data modeling scenarios, including modeling of reference data.

Entities differ from products in that they do not contain all of the product-specific functionality like specification attributes, value inheritance, or tables. As entities can only use description attributes, the application of category-specific attributes is not supported. Therefore, attributes are applied to entities strictly via object type validity and all entity instances of a particular object type will have the same attributes available for population. Additionally, entity handling is limited for publishing (e.g., as part of print publishing solutions as defined in the **Publisher (Adobe InDesign Integration)** documentation), and you cannot translate entities using a background process.

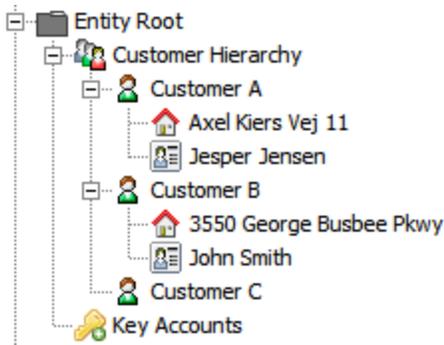
Entities may or may not be subject to approval, dependent upon the revisability settings (globally revisable entities are the same in the Main and Approved workspaces, while workspace revisable entities adhere to standard approval concepts). This provides a great deal of freedom in determining how entities are handled, specifically in terms of how events are generated and processed. For more information, see the **Revisability on Entity Object Types** section of the **Getting Started / User Guide** documentation or the **Events** section of the **System Setup /Super User Guide** documentation.

Entities cannot be linked into classifications, though configuration of entity references allows for determination of a hierarchical display (with source displayed as child to target, or vice versa). In effect, this makes classifications unnecessary for use with entities as entities can be classified via entities. Additional information on this is available in the **Entity Reference Types** section of the **System Setup /Super User Guide** documentation.

However, entities do retain the standard data modeling capabilities and provide even more configurability. The Revisability parameter allows you to define an entity object type that does not have to be approved and also determines how events are processed.

Entity Hierarchy

Any number of entity hierarchies can be added to any system. For example, you may set up address hierarchies, customer hierarchies, market hierarchies, and so on. Entities are represented by icons chosen as part of the implementation process and will likely differ on each system. The following is an example of an entity hierarchy.



For more information on hierarchy setup, see the **Object Types and Structures** section of the **System Setup /Super User Guide** documentation.

Entity Editor

Once the entity hierarchy is created and description attributes are applied to the entity object types, the next logical step is to start entering values.

Note: Only description attributes can be applied to an entity object types and will appear in the entity editor. Specification attributes are not allowed on entities.

Address		References	Referenced By	Status	State Log	Tasks
Description						
Name	>	>	Value			
ID	>		ADD_101571			
Name	>		Axel Kiers Vej 11			
Object Type	>		Address			
Revision	>		0.1 Last edited by USER on Fri Aug 14 10:59:02 EDT 2015			
Path	>		Entity hierarchy root/Entity Root/Customer Hierarchy/Customer A/Axel Kiers Vej 11			
City	>	abc	Hojbjerg			
Country	>	abc	Denmark			
State	>	abc				
Street	>	abc	Axel Kiers Vej 11			
Zip	>	t2a	DK-8270			

For example, the image above shows an entity modeled as an address. The entity object has several description attributes: City, Country, State, Street, and Zip. In addition to the Name attribute, these attribute can be modified and maintained. Since this entity object type has been modeled to be globally revisable, approval is not applicable. Therefore, the Approval Status field is not shown.

Entity References, Referenced By, and Status Tabs

Every entity editor includes a References, Referenced By, and Status tab. The labels on these three tabs remains constant, while the label of the first tab differs based on the object type. Each is defined below.

References Tab

You can view associated references of an Entity object by selecting the References Tab. In this tab, you can maintain references from the selected entity to other objects.

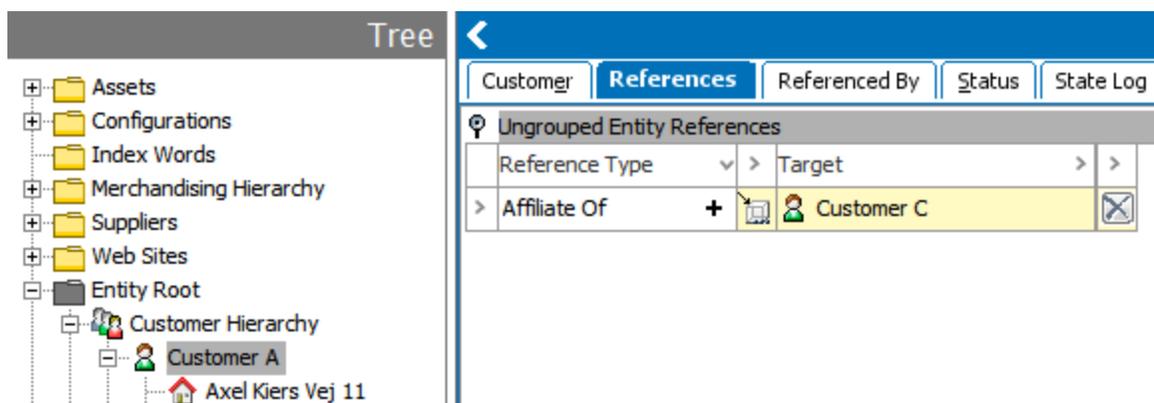
Selecting the References tab on an Entity Object will list valid References. In this tab it is possible to maintain references from the selected entity to other objects.

See **Reference Types** topic in the **System Setup / Super User Guide** documentation for more information.

An entity can reference a number of different objects. It is possible to create:

- Entity-to-Entity references
- Entity-to-Product references
- Entity-to-Classification references
- Entity-to-Asset references

In the example below, one Entity-to-Entity reference type is valid on the selected entity object. Clicking the plus sign (+) will open a large editor where you can select objects to be referenced. Alternatively, you can type the name of an object in one of the white target fields and press 'Enter.'



Reference Type		Target	
Affiliate Of	+	Customer C	✕

- Targets can be unlinked by clicking the delete button .
- Metadata attributes can be linked on to the target reference in References Tab.

Ungrouped Entity References		
Reference Type	Target	Completeness Score
> Affiliate Of	+ Customer B	
> Send to	+	

- The attributes that are linked on to the target reference will be editable once the target reference is linked to the entity reference type as shown in the above screenshot.

For the meta attributes to be visible on target reference type, add the required description attributes under Valid Attributes in System Setup > Reference Type.

Reference Type		Validity	Log
Description			
Name	>	>	Value
> ID			ContactToContact
> Name			Contact to Contact
> Last edited by			2016-07-26 15:26:27.0 by USER
> Externally Maintained			No
> Dimension Dependencies			
> Allow multiple references			Yes
> Mandatory			No
> Parent/Child relation			None
> Inheritance			None
> Completeness Score			1/23
> Purpose			abc
Aspects			
Component	>	Name	>
In Attribute Groups			
ID	>	Name	>
Add Attribute Group			
Valid Attributes			
ID	>	Name	>
> ContactName			Contact Name
> PhoneNumber			Phone Number
> Completeness Score			Completeness Score
Add Attribute			

Referenced By Tab

Selecting the Referenced By tab on an entity will list valid Reference Types. In this tab, you can maintain references from other objects to current entities.

See **Reference Types** in the **System Setup / Super User Guide** documentation for more information.

An Entity Object can reference a number of difference objects. It is possible to create:

- Product-to-Entity reference
- Entity-to-Entity reference
- Asset-to-Entity reference
- Classification-to-Entity reference

In the example below, one Entity-to-Entity reference type is valid from an Entity to the current selected Entity Object. Clicking the plus sign (+) will open a large editor where you can select objects from where a reference to the current selected Entity Object should be made. In the example, a reference from an entity named 'Customer A' is made to the current selected Entity Object.

Customer	References	Referenced By	Status	State Log
Unique Identifiers				
Reference Type	>	Source	>	
Referenced by Objects				
Reference Type	>	Source	>	>
> Affiliate Of	+	Customer A		
Used by Match Code Objects				
ID	>	Name	>	

- Metadata attributes can be linked on to the target reference in Referenced By Tab.

Referenced by Objects				
Reference Type	>	Source	>	>
> Affiliate Of	+			

- The attributes that are linked on to the target reference will be editable once the target reference is linked to the entity reference type as shown in the above screenshot.
- For the meta attributes to be visible on target reference type, add the required description attributes under Valid Attributes in System Setup > **Reference Type**.

Confirmed Duplicate Contact - Reference Type		
Reference Type	Validity	Log
Description		
Name	>>	Value
ID		ConfirmedDuplicateContact
Name		Confirmed Duplicate Contact
Last edited by		2016-08-31 13:38:24.0 by USER6
Externally Maintained		No
Dimension Dependencies		
Allow multiple references		Yes
Mandatory		No
Parent/Child relation		None
Inheritance		None
Completeness Score	123	
Purpose	abc	
Aspects		
Component	Name	Description
In Attribute Groups		
ID	Name	
Add Attribute Group		
Valid Attributes		
ID	Name	
Justification	Justification	
PhoneNumber	Phone Number	
Add Attribute		

Status Tab

A record of all the changes that have been made to a currently selected entity will be displayed. This record will allow you to see the user that made the change and when the change was made.

Tree		Customer A rev.0.1 - Status														
		Customer	References	Referenced By	Status	State Log	Tasks									
<ul style="list-style-type: none"> Assets Configurations Index Words Merchandising Hierarchy Suppliers Web Sites Entity Root <ul style="list-style-type: none"> Customer Hierarchy <ul style="list-style-type: none"> Customer A 		Revisions <table border="1"> <thead> <tr> <th>Revision</th> <th>Created</th> <th>Edited</th> <th>Major</th> <th>User</th> </tr> </thead> <tbody> <tr> <td>0.1</td> <td>Thu Jul 30 14:53:26 EDT 2015</td> <td>Fri Aug 14 10:58:36 EDT 2015</td> <td></td> <td>USER</td> </tr> </tbody> </table>					Revision	Created	Edited	Major	User	0.1	Thu Jul 30 14:53:26 EDT 2015	Fri Aug 14 10:58:36 EDT 2015		USER
Revision	Created	Edited	Major	User												
0.1	Thu Jul 30 14:53:26 EDT 2015	Fri Aug 14 10:58:36 EDT 2015		USER												
		Hidden values Diagnostics														

You can purge past revisions or revert the old revisions. There will be no Workspace, Translation, or Approval Status flipper as Entities can be created as globally revisable, meaning they are the same in both the Main and Approved workspaces.

However, Workspace, Translation, and Approval Status flipper will be displayed if we create entity object type as 'Workspace Revisable' as illustrated in below images.

Example of object type definition

Object Type		References	Log
Description			
Name	>	>	Value
ID			Account
Name			Account
Last edited by			2017-10-16 16:25:44 by USERE
Name Pattern			
ID Pattern			
Enable Profiling			No
Icon			
Dimension Dependencies			
Revisability			Workspace Revisable
Aspects			
Component	>	Name	>
Valid Attributes			
ID	>	Name	>
Add Attribute			

Example status tab for workspace revisable object

Tree		Account Group 1 rev.0.1 - Status					
Tree	Assets	Account	References	Referenced By	Status	State Log	
Search	Classifications	Revisions					
BG Processes	Configurations	Revision	Created	Edited	Major	User	
Item Setup	eClass 10	>	>	>	>	>	
	ETIM Hierarchy	0.1	Mon Oct 16 16:28:55 EDT 2017	Mon Oct 16 16:28:55 EDT 2017		USERE	
	Index Words	Workspaces					
	Merchandising Hierarchy	ID	Name	Path			
	Offers	>	>	>	>	>	
	Suppliers	Main	Main	Main		0.1	
	Web Sites	Approval status in all contexts					
	Customer Root	Hidden values					
	Customers	Diagnostics					
	Entity Root						
	Account Group 1						

Products

This topic covers information specific to the Product super type that is important to know when working with products. For general object maintenance information (applicable to all object types rather than specific to products), see the **Object Maintenance in Tree** topic within this guide.

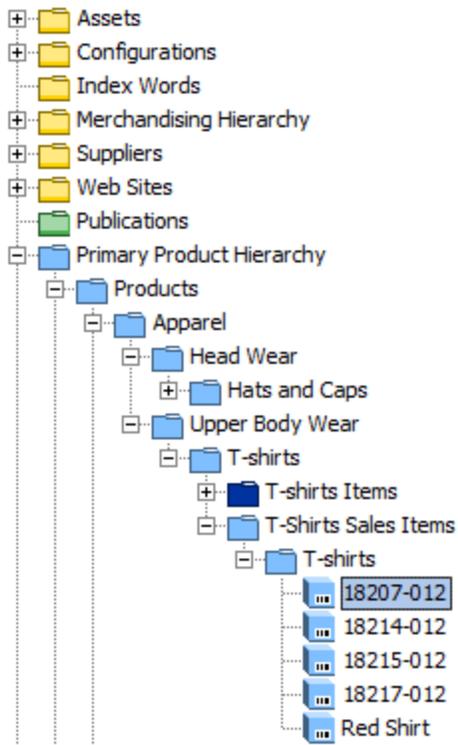
In STEP terms, a product is a part number, a stock number, an order number, a catalog number, a product number, etc. In other words, any item that a company sells that can be ordered.

Product Hierarchy

The foundation for a product-centric STEP installation is the Product Hierarchy / Primary Product Hierarchy. The product hierarchy consists solely of objects of the product super type. The product hierarchy is an organized hierarchy where all products in the workbench are stored. This is also where products and product attributes are linked. Although configurable, the product hierarchy is usually a multi-level hierarchy—each level controlled by its own unique object type. Super users can control the naming convention(s) used to categorize the products at their different levels.

Inheritance of attributes and values is supported within the Product Hierarchy and the hierarchy is usually designed to take advantage of this capability, with objects classified according to similar characteristics. More information on inheritance is available in the **Inheritance in the Product Hierarchy** topic in this guide.

A portion of a sample hierarchy is shown below. Categories are represented by folder icons, while discrete objects are represented by cubes.



All objects of the product super type must exist in the product hierarchy, and may exist only once (e.g., each object can have only a single parent). The primary purpose of the product hierarchy is proper attribution of products. That is, in the product hierarchy, products should be grouped according to their similar properties so that inheritance of attributes, attribute values, and references can best be used. Based on this, it is evident that the Product Hierarchy is not intended to be used for modeling website hierarchies or other taxonomies (e.g., merchandising hierarchy, sales hierarchy, etc.) where an object can be represented multiple times. When a product needs to "live" in more than one location, that can be accomplished using classification hierarchies. In this case, the product continues to exist in the product hierarchy (and this is considered its true place of residence). It is then linked into one or more classification hierarchies using references.

Product Editor

The Product Editor is displayed when an object of the product super type is selected in Tree.

20808-013 rev.0.7 - Product 0% complete

Commercial Tables Category Profile Proof View Status State Log Tasks

Product Sub Products References Referenced By Images & Documents

2 Description

Name	Value
ID	101567
Name	20808-013
Object Type	Sales Item
Revision	0.7 Last edited by USER6 on Wed Jan 18 08:38:58 EST 2017
Approved	Last Approved on Mon Aug 10 09:47:21 EDT 2015
Translation	Not Translated
Path	Primary Product Hierarchy/Products/Apparel/Head Wear/Hats and Caps/Ha...
Category	Primary Product Hierarchy Products Apparel Head Wear Hats and Caps Hats and Caps Sales Items 20808-013 20808-013
Parent	Hats and Caps Sales Items

3

4 Manufacturer Information

Category Specific Attributes

Attribute Group

5 Display

Name	Value
Manufacturer Name	abc
Product Width	123
Product Height	123
Selling Price	123 12.99 \$
Product Depth	123
Annual Sales Forecast, Maxim	123 250
Annual Sales Forecast, Minim	123 100
Description, Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric Undervisor, Matching Fabric Adjustable Hook and Loop Closure, One size fits most.

1. The **Product** tab (known as the Product Editor) is the primary interface for working with product objects in the workbench.
2. The **Description** flipper displays basic information about the object. Additional information about the data displayed is described in the Editing Objects in Tree topic within this guide. Note that some information displayed is common for all implementations, while other information is specific to the data model and configuration of each system.
3. If the object has a **primary image** referenced, a thumbnail version of it will display. The reference type to be used for the thumbnail display is controlled in System Settings (on the Users & Groups node), and additional information on this is available in the Primary Image Type topic in the System Setup / Super User guide. Additional information on references in general is available in the Reference and Link Types topic in that same guide.
4. **Specification attributes** are displayed in flippers, with the flipper name matching the attribute group. Flippers can be expanded / collapsed by clicking the magnification icon. Note that when attribute groups have sub-groups, configuration determines whether the parent group or the child sub-group is displayed as the flipper name. This is set via the 'Product Editor, Group attributes by top group' parameter in System Settings (on the Users & Groups node), and additional information on this is available in the Product Information Manager Default Settings topic in the System Setup / Super User guide. More information on attributes in general is available in the Attributes section in that same guide.

5. Attribute values can be edited by clicking into any editable field. Additional information on the various editing options is available in the Editing Objects in Tree topic within this guide. By default, attributes are displayed in alphabetical order within each flipper. However, if an attribute display sequence has been configured, this will override the alphabetical sorting. More information on attribute display sequence is available in the Attribute Display Sequence topic in the System Setup / Super User guide.

Additional Editors

See the additional topics listed below for information on the other editors available on products.

- **Category Profile:** Allows users to configure and view profiling data and dashboards for the objects under the selected node. See the **Data Profiles** topic in the Data Profiling documentation for more information.
- **Commercial:** Allows users to add and edit commercial terms for the object. Commercial data / terms lists are often used to store pricing information. See the **Commercial Data** section of the **STEP Publisher (InDesign)** guide for more information.
- **Images & Documents:** Allows users to view and edit assets referenced by the object (or inherited from parental objects). See the **Images & Documents Tab** topic within this guide for more information.
- **Product Variants:** Allows the user to generate and manage a family of products, which are basically the same, only varying on the values of a small sub-set of their attributes. For example, clothing and shoes both offer good use cases for product variants as shoes or clothing items may come in multiple sizes and colors, but are otherwise identical. The product family holds all data for the item, e.g., a particular shoe, while the variants would hold only the various combinations of the color and size varieties (e.g., size 7 red, size 8 blue, etc). The Product Variants tab is only present if the system has been configured to support variants. For more information on this, see the **Product Variants** documentation in the System Setup / Super User guide.
- **Proof View:** Allows users to preview a close representation of how a product will look when mounted onto an InDesign page based on a selected publication version and product template. For more information, see the **Proof View** section of the **STEP Publisher** documentation.
- **Referenced By:** Allows users to view all objects referencing the current object, and add / remove / edit these references. See the **Referenced By Tab** topic within this guide.
- **References:** Allows users to view all objects that the current object references, and add / remove / edit these references. See the **References Tab** topic within this guide.
- **State Log:** Allows users to view the recent history of the object across all workflows in which it has been entered. See the **State Log Tab** topic in the **Workflows** documentation for more information.
- **Status:** Allows users to view basic information about the object, including revision history, translation status, and approval status. See the **Status Tab** topic within this guide for more information.
- **Sub Products:** Allows users to view and edit all child objects of the selected object in a table form. See the **Sub Products Tab** topic within this guide for more information.
- **Tables:** Allows users to view and edit the tables defined for the object. Tables are generally used to present consolidated data across multiple objects, such as object name, part number, and price. For more information, see the **Tables** guide.
- **Tasks:** Displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** guide.

Inheritance in the Product Hierarchy

Inheritance in STEP is the concept that when the value of an attribute is defined in a parent product, all the child products that exist under the parent product can inherit the value - meaning that the value is present on the child, as well as the parent. If the attribute is also valid on the child (in addition to the parent), then the value can be locally edited on the child (e.g., a different value supplied so the child no longer inherits the value from the parent). Note that value inheritance also applies to references, meaning that if a reference is populated on a parent, it is also available on the child in the same way as an attribute value. However, references must be explicitly configured for inheritance to be in place, while attribute values will automatically inherit to child products.

In addition to value inheritance, attribute inheritance is also available in the product hierarchy. This means that attributes can be linked to specific nodes / categories so they only appear for those categories and their children. For example, consider a company that manages data for both batteries and clothing. Size might be applicable to both categories of objects since both batteries and apparel have sizes assigned. However, sleeve length and voltage are characteristics applicable for clothing and batteries, respectively, and it could be confusing to see a 'Voltage' attribute on a clothing item. To avoid this, the 'Voltage' attribute could be linked to the 'Batteries' category, while the 'Sleeve Length' attribute could be linked to an 'Upper Body Apparel' category.

Inheritance perpetuates throughout the hierarchy, no matter how many levels are present (e.g., inherited attributes and values appear on children, grandchildren, etc.). When attributes are considered applicable to all products, regardless of category, they are called 'global attributes'. For example, attributes such as Price, Description, and Manufacturer Name. Thus, these attributes are linked to the top level in the product hierarchy and are inherited down to all products beneath, no matter how many levels there are.

Attribute inheritance only means that the attributes are *available* for all of the products beneath where they are linked. The process of linking attributes to different levels does not have anything to do with the actual values that will go into the attributes for any particular product. In the 'Voltage' example, when linking that attribute, you are only concerned with making that attribute available to all the battery products—not with the actual voltage for any given product. However, if many batteries under a parent shared the same value, the value could be populated on the parent to inherit down to the children. Any children varying from the parent value could then be edited individually, while those having the same value as the parent do not need to be updated further. Note that attribute inheritance within the product hierarchy is only available with specification attributes, and is not available with description attributes. Further note that this topic focuses on inheritance solely within the product hierarchy. However, it is important to be aware that attribute inheritance can also be used within classification hierarchies that are used to organize product objects. Attributes can be linked to a classification, making them available for all products linked into that classification (or a child classification). More information on attribute inheritance with classifications is available in the **Classifications** topic within this guide, and within the **Attribute Links** topic in the **System Setup** guide.

Important: Value inheritance is a powerful feature, but care should be taken not to maintain values at a level too high in the hierarchy. With such a setup, a single change could mean that thousands or millions of products would have to be updated in downstream systems and many systems are not geared to handle massive feeds like that.

When working with products and/or creating new products, users should be mindful of inheritance, considering both the inheritance of the available attributes, as well as their specific values or references. It may be helpful to consider the following:

- Is the hierarchy granular enough to allow products within the category to be grouped so that all products only have the relevant attributes, or are additional category levels required to obtain this granularity?
- Which attributes are required for the products in the category and/or subcategories?
- If product variants are used, which attributes should be maintained at the family level and which ones should be maintained at the variant level?

Note: Data can also inherit from dimensions (e.g., language or country). More information on this is available in the **Dimension Dependent Data** section of the **Contexts** topic in the **System Setup / Super User Guide**.

Linking Attributes to Products

To make attributes valid for products, they must be linked to the appropriate tree nodes in the product hierarchy. Some attributes will be global attributes (applicable to all objects in the product hierarchy) and are linked to the “Product Hierarchy” root node. These global attributes are then valid for all products. Other attributes apply only to specific categories of objects, and are then linked directly to those categories, making them available for all objects within that category (if also set as valid for those object types). Attributes should not be linked to individual leaf objects, as each one would have to have the link individually applied. Instead, attributes should be linked to some parental folder in the hierarchy above the objects needing to use the attribute.

Before proceeding, be aware of the following:

- Attributes can be linked to objects of the product or classification super type. In either case, the steps are comparable and the attributes are made available for the children “under” the node at which they are linked (being mindful that “under” means “actual children” in the product hierarchy, whereas it means “objects with a reference to” when dealing with classifications).
- Linked attributes apply only to objects of the product super type. For example, linking attributes to a classification object that holds assets does not make those attributes available on the child assets.
- Only Specification attributes can be linked to products or classifications. Description attributes cannot be linked attributes.

Linking Attributes

1. Select the product group or classification and click the **References** tab.
2. Expand the appropriate flipper (**Linked Attributes from Product Hierarchy** on product objects or **Attributes** on classification objects), then click **Link to Attribute**.

Product	Sub Products	References	Referenced By	Images & Documents
Discontinued Product Maintenance				
Image References				
Sales Item References, Classification				
Sales Item References, Product				
Index Words				
Publications				
Linked Attributes from Product Hierarchy				
ID		Name		
✓ AirTransportationRestrictions		Air Transportation Restrictions		
✓ AnnualSalesForecastMaximum		Annual Sales Forecast, Maximum		
✓ AnnualSalesForecast,Minimum		Annual Sales Forecast, Minimum		
✓ AvailabilityEnd		Availability End		
✓ AvailabilityStart		Availability Start		
✓ BaseUnitOfMeasure		Base Unit of Measure		
✓ BrandName		Brand Name		
✓ BrandOwner		Brand Owner		
✓ Color		Color		
✓ Cost		Cost		
✓ CostEffectiveDate		Cost Effective Date		
✓ CostExpirationDate		Cost Expiration Date		
✓ CountryOfOrigin		Country of Origin		
✓ DescriptionLong		Description, Long		
✓ TaxClassification		Tax Classification		
✓ TshirtSize		T-shirt Size		
> Link to Attribute				

Classification | Sub Products | **References** | Referenced By

Ungrouped Classification References

Reference Type	>	Target	>	>
> Related Web Cla...	+			

Applied Privileges

Applies to	>	Action Set	>	Attribute G...	>	Object Type	>
------------	---	------------	---	----------------	---	-------------	---

Add Privilege

Visible Objects in Other Contexts

Attributes

Completeness Score	>	ID
>		Color
>		Link to Attribute

3. In the standard search / browse window that displays, locate the appropriate attribute(s) and click **Select**.

Localizing an Attribute Link

Local attribute links can be created to override inherited attribute links.

1. Select any existing inherited attribute link and right-click on the row indicator.
2. Select the **Create Local Link** option.

Linked Attributes from Product Hi

DisplaySequence	>	Co
-----------------	---	----

Hide

Show All Columns

Rotate Table

Link to Attribute

Remove Link to Attribute

Create Local Link

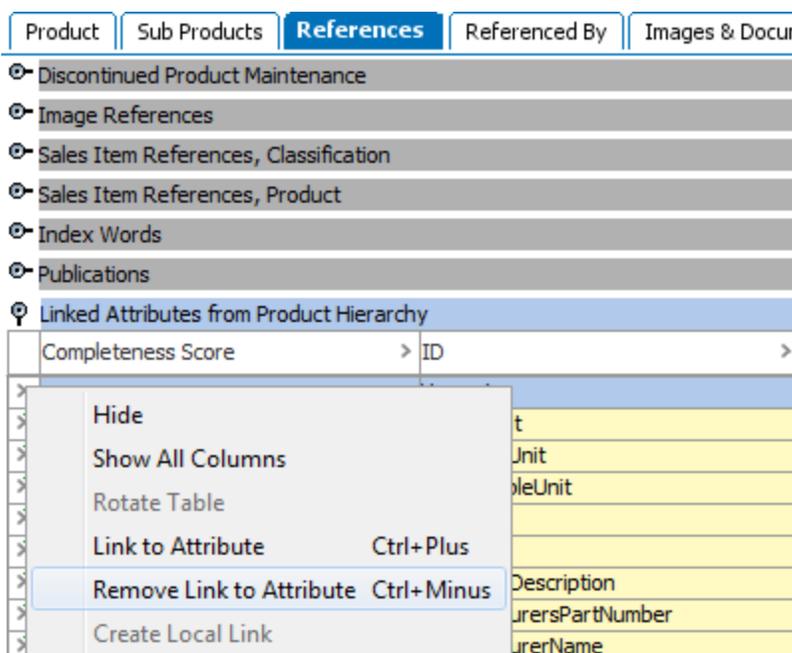
This creates a local version of the link where attributes on the reference can be locally edited. Local links are removed the same way as inherited links, though removing a local link re-applies the inherited link.

Unlinking a Linked Attribute

Unlinking an attribute does *not* delete the attribute from STEP; it removes the link so the attribute is no longer available for population on the selected node (and child nodes, if applicable). Note that attribute links must be removed from the same node to which they were added. In other words, trying to remove an inherited attribute link is not possible and the 'Remove Link to Attribute' option will be disabled. To remove an inherited link, it must be removed on the parental object that holds the link. However, care should be taken in doing this as it will remove the link for *all* child groups, and will need to be re-linked at those lower child levels if it is still needed there.

1. On the References tab of the object, expand the appropriate flipper (**Linked Attributes from Product Hierarchy** on product objects or **Attributes** on classification objects).
2. Right-click on the row indicator and select **Remove Link to Attribute** from the context menu (or use Ctrl + "-"). Multiple attributes can be unlinked simultaneously by multi-selecting.

Note: If an attribute has been linked locally, removing the link only removes the local link, and the inherited link will again take effect.



Additional methods for maintaining attributes links

Attribute links can be added and removed in a number of ways, in addition to what has been described above. These include:

- **References** tab of the attribute itself
- **Maintain > Link** menu when a product or classification is selected
- **Edit > Link to Attribute / Remove Link to Attribute** menu when a product or classification is selected

All methods for adding and removing attribute links are equivalent, producing the same end result.

Working with Inherited Values

There are many advantages to setting common values:

- When an update is needed, the value is only entered once in the product group instead of – potentially – separately, across hundreds of products.
- When new products are added to the group, they automatically inherit the product group’s values.
- The translation of product group values only need to be performed once, as opposed to translating the same value every time for individual products.

As mentioned above, it is possible to set attribute values for an individual product, but consider a situation where all products within a product group share common attribute values. For example, a set of hats that share a common description and features.

There are two ways to approach this: 1) keep all common values with the individual product or 2) set the common value at a higher level in the product hierarchy. By setting the value higher in the hierarchy, the attribute value is inherited down to all products beneath.

Name	Value
> Manufacturer Name	abc
> Product Width	123
> Product Height	123
> Selling Price	123 12.99 \$
> Product Depth	123
> Annual Sales Forecast, Maxim	123 250
> Annual Sales Forecast, Minim	123 100
> Description, Long	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric Undervisor, Matching Fabric Adjustable Hook and Loop Closure, One size fits most.
> Description, Table	abc
> Description, Web	abc
> Feature Bullet 1	abc Built-in sweatband wicks away sweat to keep you cool & dry
> Feature Bullet 2	abc Stretch construction provides a comfortable fit

The image above shows three inherited values, which are designated by a green down arrow (▼).

The value is set at the product group, or in this case, 'Hats and Caps Sales Items'. Therefore, all products beneath will inherit the same value.

It is possible to override an inherited value by setting a different value at any subordinate level, e.g., the product level. This is called a **localized value**. However, this requires that the attribute be valid for the child object type (as is the case for the inherited values shown in the screenshot above). Attributes that display as inherited (indicated

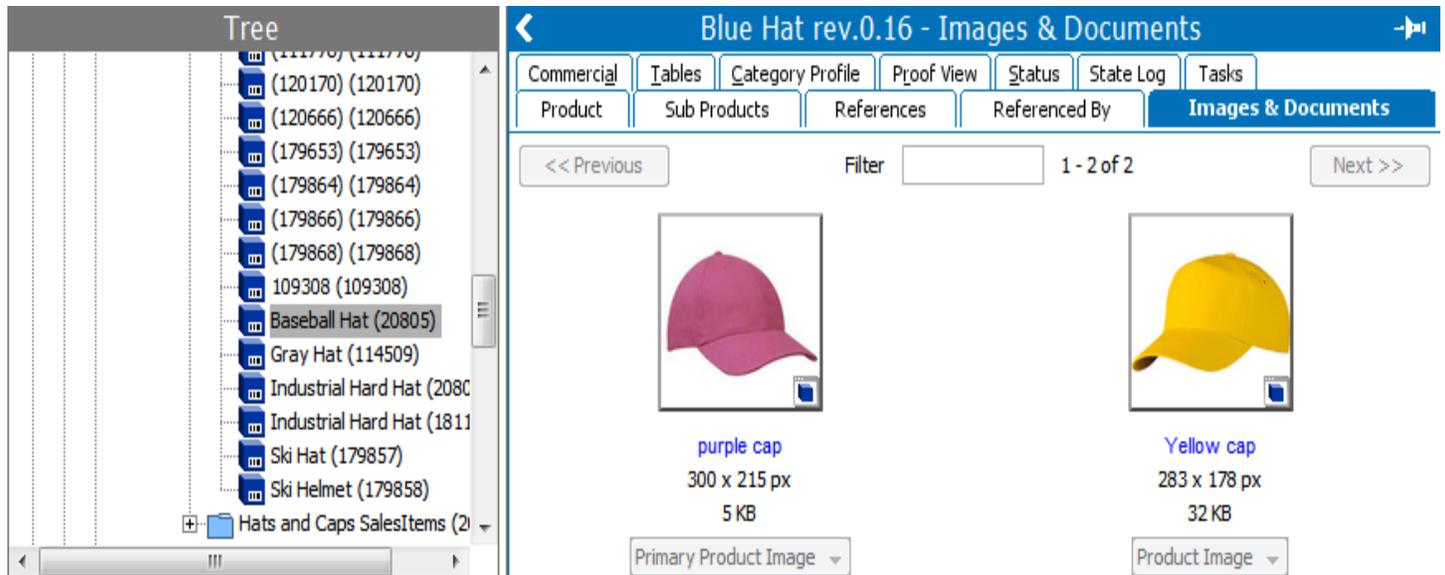
by the green arrow) but not editable (e.g., value field is yellow rather than white) are not valid for the object, so they can only have a common value with all sibling products, which is inherited from a parent higher in the hierarchy. Detailed information on setting validity of attributes is available in the **Validity on Specification Attributes** topic in the **System Setup / Super User Guide**.

If a value is localized, then subsequently deleted, the product will again automatically inherit the parental value. Therefore, it is impossible to have null (blank) values for inherited attributes (unless the parental object has the null value).

For information on working with and/or setting up inherited reference values, see the **Inheritance Example for a Reference** section of the **System Setup / Super User Guide**.

Images & Documents Tab

When working with products, the Images & Documents tab displays thumbnails of all assets that are referenced by the selected product, or inherited from a parental object referencing the asset. When working with classifications, this tab displays all assets that are child to the selected classification. The functionality for working with the displayed assets is the same, regardless of whether a product or classification has been selected.



If more than 50 assets are present, the **Next / Previous** buttons are enabled at the top of the screen, allowing users to page through sets of assets (50 at a time). Filtering functionality is also available and is especially useful when working with large sets of assets. The options for filtering are described below.

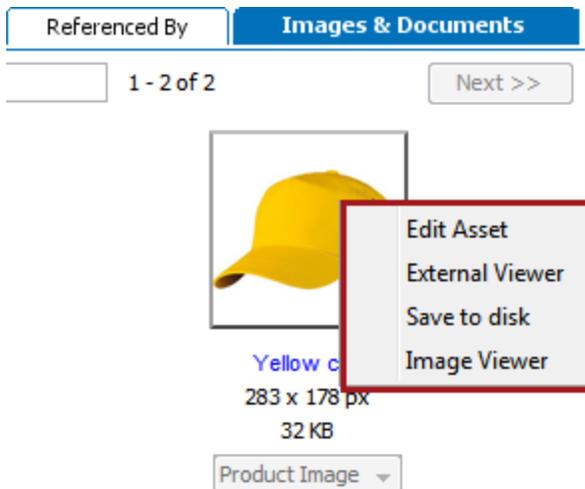
Along with each thumbnail, basic information about the asset is displayed, including asset name, pixel size, file size, and reference type used to link the asset to the selected object.

Interacting with Assets

From the Images & Documents tab, several actions can be taken with the displayed assets.

Edit asset

By right-clicking on the asset, users can edit any assets on the page, open an external viewer, save the image to a disk or local PC, and view the image on a larger scale.



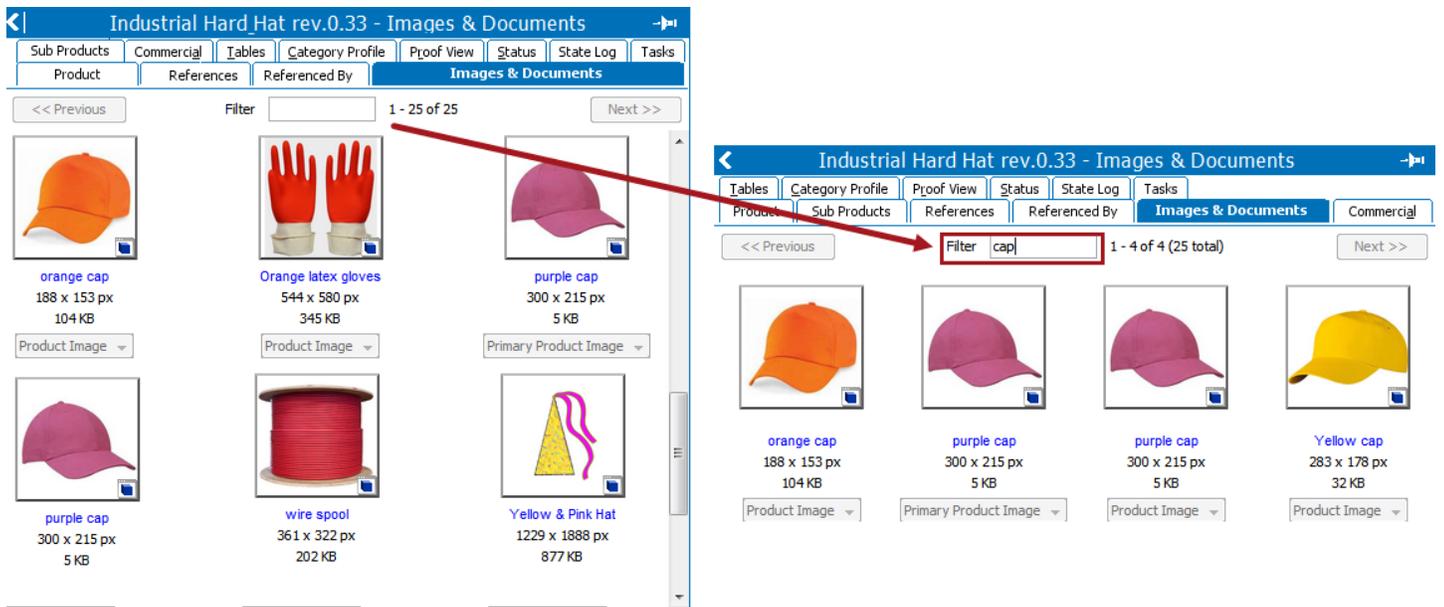
Edit reference type

The type of reference that links the object and the asset is displayed in a dropdown below the asset thumbnail. Selection in the dropdown will be disabled (grayed out) if there is only one valid reference between the object type and asset type. If multiple valid reference types are available, selection of the reference type is enabled and can be edited from this location. More information on references is available in the **Reference and Link Types** topic in the **System Setup / Super User Guide**.

Filter the displayed assets

A user can filter the displayed assets by entering the name of the asset in the Filter field. This action displays assets that have the entered value as part of the asset name, as shown below.

Note: The filter automatically applies wildcard functionality so explicit entry of wildcards (*) is not needed. Entering an asterisk will cause the system to search for assets with an asterisk in their name.



To remove the applied filter, delete the characters in the filter field and press the Enter key on your keyboard.

Navigate to asset

The asset name is shown directly below the asset thumbnail as a hyperlink. Clicking the hyperlink navigates directly to the asset in the classification structure.

Product Overrides

Product overrides are alternate versions of products and product families that may have differing values, references, links, and structures. Attributes and values applied to the product family are inherited to the product override and can be replaced with local values and references on the product override. Product overrides allow product objects to exist in multiple locations in the product hierarchy and are the primary building blocks for many print product presentations. A product override allows for the creation of 'pseudo' product families that are flexible to ever-changing print presentations. They can be thought of as a workaround for when an existing product family does not contain the exact products needed for a publication layout and/or its accompanying STEP table(s).

A product override folder can include products from various "standard" (e.g., non-override) product families. Similarly, a product override leaf object can live under a different product folder (override or standard) than the folder in which its corresponding standard object resides.

Tree

- Assets
- Configurations
- Index Words
- Merchandising Hierarchy
- Suppliers
- Web Sites
- Entity Root
- Publications
- Primary Product Hierarchy
 - Products
 - Discontinued Products
 - Product Overrides
 - Level 1
 - Level 2
 - 101609 -> SKU 00001
 - Packaging
 - Regional Products
- Collections
- eCatalogs
- Recycle Bin

101609 -> SKU 00001 rev.0.1 - Product

Product | Sub Products | References | Referenced By | Images & Documents | Commercial | Tables | Status

Description

Name	Value
ID	101609
Name	101609
Object Type	Product-override
Revision	0.1 Last edited by USER on Tue Aug 04 11:18:17 EDT 2015
Approved	Never Been Approved
Translation	Not Translated
Path	Primary Product Hierarchy/Product Overrides/Level 1/Level 2/101609 -> SKU 00001
Overridden Product	SKU 00001 (SKU 00001)
Product Variant Priority	

Compare this with Overridden product

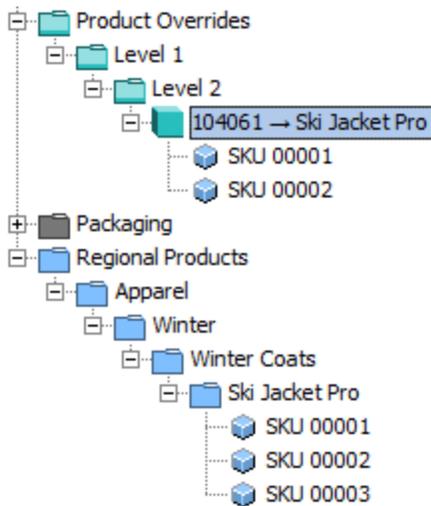
Attribute Group

Name	Value
Size	abc Medium

1. Tree Structure: For clarity, it is recommended to house product overrides in a separate sub-hierarchy from standard products.

2. Override Interface: The product override object makes it possible to override the children, attributes, and references of a product / product family. This is useful in order to publish a limited version of a product family without modifying the object itself.

Example



In this example a product family **Ski Jacket Pro** has three products. A product override **104061** is created and based on the product family **Ski Jacket Pro**. Attributes, values, and references are inherited from the product family **Ski Jacket Pro** to the product override folder and can be replaced with local values and references on the product override.

Two products from the product family **Ski Jacket Pro** are linked into the product override folder (SKU 00001 and SKU 00002). The product override only contains a subset of the products included in the original product family **Ski Jacket Pro**, as SKU 00003 is not included.

Important: Values and references inherited to a product override will not be inherited to products linked into the product override. These products will have their values inherited from their original structure instead.

Selecting the Product tab or References tab on the product-override will indicate with a yellow icon () if an attribute or reference is inherited from an overridden product. Inherited values and references can be replaced with local versions, assuming the relevant attribute and/or reference is valid on the relevant product override object type.

Creating a Product Override

1. In **Tree**, select an object for which an override should be created.
2. Right-Click and select **New Product-Override**
3. In the Create Product-Override dialog,
 - Click an Object Type
 - Key in ID and Name
 - **Optional:** Click the ellipsis button () to select a product family to adapt values, references, and links from. The product-override will inherit all values, references, and links from the selected product family.

- **Optional:** Click 'Adopt Children' if the product-override should also include all products from the overridden product family.

4. Press **Create** to create the product-override.

Linking Products into a Product Override

1. In **Tree**, select the product override
2. Right-click the product override and select **Add Children to Override**
3. **Search** or **Browse** for the products to be linked into the product override

Removing Products from the Product Override

1. In **Tree**, select the product override
2. Expand the product override and select the product to be removed
3. Right-click and select **Remove Child from Override**

Creating a Subordinate Product Override

1. In **Tree**, select the product override
2. Select a product linked into the product override
3. Right-click the product and click **Convert to Product-Override**

The product will be converted into a product override. Values, references, and links will get inherited from the overridden product.

Referenced By Tab

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). In addition, if the object is used by product overrides, has a match code acting on it, or is used by any publication, that information can be viewed on this tab. Finally, privileges assigned to the product can be added and edited from this location, and subproducts that are present only in other contexts can be viewed (if the object is of a dimension-dependent object type).

The display of the Referenced By tab on a product will vary slightly from system to system, based on the data model.

1. **Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid target that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a source for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the **Reference and Link Types** topic in the **System Setup / Super User Guide** documentation.

2. **Referenced by Products, Classifications or Entities:** The functionality is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
3. **Used By Product Overrides:** Displays product override objects that are based on the selected object. More information on product overrides is available in the **Product Overrides** topic in this guide.
4. **Linked into Product Overrides:** Displays product override objects that have the selected object as a child. More information on product overrides is available in the **Product Overrides** topic in this guide.
5. **Used by Match Code Objects:** If the selected object is the Category indicated in a match code, the match code will display. For example:

Name	Value
ID	FindSimilar
Name	Find Similar
Last edited by	2017-01-19 13:55:37 by USER6
Category	Shoes (20689)
Match Code Window Size	1

ID	Name	Edited by
FindSimilar	Find Similar	2017-01-19 13:58:41 by USER6

More information on match codes is available in the **Matching, Linking, and Merging** documentation.

6. **Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the **STEP Publisher (Adobe InDesign Integration)** documentation.
7. **Applied Privileges:** Displays the privileges that have been applied to the selected node. Privileges can be added using the Add Privilege link, and can be removed by clicking on the row indicator and selecting 'Remove Privilege'. Existing privileges cannot be edited from this interface. Detailed information on creating and editing privileges is available in the **Privilege Rules** section of the **System Setup / Super User** guide.
8. **Visible Sub-Products in Other Contexts:** Displays subproducts that are visible in another context, which is only applicable if the object type is dimension-dependent. Note that it is *not* recommended to make product object types dimension-dependent; instead, it should only be data *on* objects (e.g., attributes and references) that are dimension-dependent. As a result, this flipper is rarely used.

References Tab

The References tab is where all references of which the selected object is the source can be viewed and edited (assuming proper privileges are in place). In addition, if the object has associated index words, is used by any publication, or has any linked attributes, that information can be viewed and edited on this tab.

The display of the References tab on a product will vary slightly from system to system, based on the data model.

Tree

- Assets
- Configurations
- ETIM Hierarchy
- Index Words
- Merchandising Hierarchy
- Suppliers
- Web Sites
- Entity Root
- GDSN
- Publications
- Primary Product Hierarchy
 - Products
 - Apparel
 - Upper Body Wear
 - T-shirts
 - T-shirts Items
 - 12-GGK799
 - Cotton T-shirts
 - New Shirt
 - Polo T-shirt
 - T-Shirts Sales Items
 - Head Wear
 - Footwear
 - Safety
 - Hardware
 - Displays
 - Furniture
 - Automotive
 - Building Products
 - Electrical & Electronics
 - Food and Beverage
 - Kitchen
 - Party Supplies
 - Discontinued Products
 - Product Overrides
 - Packaging
 - GDSN Products
 - Collections

References

Product | Sub Products | **References** | Referenced By | Images & Documents | Commercial | Tables

1 Discontinued Product Maintenance

Document References

Image References

Item References, Classification

Item References, Product

Reference Type	Target	Qty	
> Bill of Materials +	18212 L B	1	X
> Supplier Replace... +	18213 M O	1	X

Packaging Hierarchy References

Sales Item References, Classification

Sales Item References, Product

Ungrouped Classification Links

Ungrouped Product References

Reference Type	Target	
> Packaging Link +		

3 Index Words

Inherited From	Index	Level 1
> Locally defined	Indexdoc_Test	Index Words/Indexdoc_Test/consequati
> Locally defined	Indexdoc_Test	Index Words/Indexdoc_Test/doluptatus
> Locally defined	Indexdoc_Test	Index Words/Indexdoc_Test/polyester

> Add Index Word

4 Publications

ID	Name
> 108494	Autopage Publications/Acme Wholesale Clothing/Caps and Hats
> 111845	Autopage Publications/Acme Wholesale Clothing/Shirts
> 111512	Autopage Publications/Beta Tools/Power Tools

> Link to Publication or Section

5 Linked Attributes from Product Hierarchy

Linked Attributes from Classification Hierarchy

1. **Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created from the currently selected object to the object selected in the dialog (e.g., current object = source, dialog selection = target). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.
2. **Ungrouped References:** The functionality is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes. If *all* references that are valid for the selected object have been placed in attribute groups, the **Ungrouped Classification Links** and **Ungrouped Product References** flippers will not be present.
3. **Index Words:** Allows users to view index words linked to the currently selected object, and to link index words using the **Add Index Words** link. Index words are maintained in a dedicated hierarchy where it is possible to maintain the word itself along with a sort word. More information is available in the Creating an Index Words Structure topic in the STEP Publisher documentation.
4. **Publications:** Publications that the currently selected product is linked to are displayed, and new links can be created using the **Link to Publication or Section** link. Additional information about working with publications is available in the STEP Publisher (Adobe InDesign Integration) documentation.
5. **Linked Attributes:** Attributes that are linked directly to the selected product or inherited from a parental node in the hierarchy display under the **Linked Attributes from Product Hierarchy** flipper. The exact columns available will depend on the data model and the attributes that have been made valid on product attribute links. Whether or not the various attributes are editable will also depend on the setup of the data model. However, an ID and Name field are always shown, with the attribute name being a hyperlink that can be used to navigate directly to the attribute. An Attribute Groups column is also present, displaying the attribute group(s) that the attribute is in. A Mandatory column is present and if checked, the object cannot be approved until a value has been provided for the attribute. Note that mandatory settings on the attribute itself apply globally, while mandatory settings on the attribute link apply only to objects that are child of the node at which the attribute is linked. More information on mandatory settings is available in the Mandatory Attributes topic in the System Setup / Super User guide. If the attribute link is inherited (indicated by a green down arrow, , in the row indicator), the 'Inherited from' column will display the parental node where the attribute has been linked, which is hyperlinked for easy navigation. More information on linked attributes is available in the Inheritance in the Product Hierarchy topic within this guide and in the Attribute Links topic in the System Setup / Super User guide.

The **Linked Attributes from Classification Hierarchy** flipper is comparable to the product hierarchy counterpart described above, though shows attributes linked to a classification that the object is a member of (e.g., has a reference to), rather than attributes that are linked to a parental product. The same considerations apply in that the exact columns available will vary based on the data model, with ID, Name, Attribute Groups, and Mandatory columns always being present and functioning in the same way as for product attribute links. Note that objects shown in the 'Inherited from' column in this case are parental objects not of the selected object itself, but instead of a classification that is parent to the classification that the selected object references.

Status Tab

The Status Tab provides general information about objects, including revisions, translation status, and approval status. For products and classifications, the Status tab displays the same information, regardless of the object type. Publications, attributes, entities, and assets have slightly different information available, though much of it is common to what is described below.

Product	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Category Profile	Proof View	Status	State Log	Tasks
Revisions 1											
Revision	Created	Edited	Major	User	Comment						
> 0.4	Fri Oct 23 16:49:50 EDT 2015	Tue Jan 19 15:42:51 EST 2016		USER	Auto Generated						
> 0.3	Fri Oct 16 09:39:06 EDT 2015	Fri Oct 16 09:39:06 EDT 2015		USER	Complete approval						
> 0.2	Tue Sep 22 14:14:02 EDT 2015	Tue Sep 22 14:14:02 EDT 2015		USER	Auto Generated						
> 0.1	Fri Feb 13 11:36:40 EST 2015	Fri Feb 13 11:36:40 EST 2015		STEPSYS							
Workspaces 2											
ID	Name	Path									
> Main	Main	Main			0.4						
> Approved	Approved	Main/Approved			0.3						
Translation 3											
Master : <input type="text"/>											
Source	Target	Status									
Approval status in all contexts 4											
Context	Approval Status										
> Danish DK	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> English UK	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> English US	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> French Belgium	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> French Canada	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> French FR	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> Germany German	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
> Israel Hebrew	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015										
Hidden values 5											
Attribute	Visible in workspaces	Visible in dimensions	Value								
> Long Item Description	Approved, Main	Country=AllCountries, Language=en-US	Red carpet worthy pumps in scarlet suede is sure								
> Packaging Type	Approved, Main	Country=AllCountries, Language=std.lang.all	Box								
> Supplier Name	Approved, Main	Country=AllCountries	Products Galore								
Diagnostics 6											
No problems found											

1. **Revisions:** In STEP, historical versions of objects are stored as revisions. A revision thus represents a historical "snapshot" of an object. The Revisions flipper provides a record of the revisions that have been made to the currently selected object, including when changes to the object were made and who made them. Via right-click, users are able to purge old revisions or revert to previous revisions. For more information on revisions, including how they are generated and how they should be managed, see the **Revisions** topic in the **System Setup / Super User Guide**.
2. **Workspaces:** All the workspaces that the selected products are in will display, as well as the revision number that exists in that workspace. Generally speaking, if the object has been edited since it was approved, the Main and Approved workspaces will hold different revisions. However, it should be noted that not all changes to an object generate a revision. More information on this is available in the **Revisions** topic in the **System Setup / Super User Guide**. For more information on workspaces in general, see the **Workspaces** topic in the **System Setup / Super User Guide**.
3. **Translation:** Translation relations (sources and targets) and status (e.g., Up to date, Re-translation needed, etc) of the translations display. For more information, see the **Translations** documentation.
4. **Approval status in all contexts:** Displays the approval status of the object in each context on the system. More information on approvals is available in the **Approval of Objects** topic in the Getting Started / User guide. More information on contexts is available in the **Contexts** topic in the **System Setup / Super User Guide**.
5. **Hidden values:** Displays hidden inherited values on the object. Hidden values are those that are inherited from another dimension (e.g., language or country) rather than from a parental object. More information on this is available in the **Dimension Dependent Data** section of the Contexts topic in the **System Setup / Super User Guide**.
6. **Diagnostics:** Displays any issues with the object found by system diagnostics. If a problem has been found, the information can be copied by clicking the file link.



Sub Products Tab

When the Sub Products tab is accessed on an object of the product super type, all direct children of the selected node are displayed. If privileges allow, data can be edited on the displayed objects by clicking directly into any editable field. Standard editing capabilities are available within this interface (as described in the **Editing Objects in Tree** topic within this guide) including copy / paste functionality using Ctrl + C and Ctrl + V.

Tree

- Assets
- Configurations
- ETIM Hierarchy
- Index Words
- Merchandising Hierarchy
- Suppliers
- Web Sites
- Entity Root
- GDSN
- Publications
- Primary Product Hierarchy
 - Products
 - Apparel
 - Upper Body Wear
 - T-shirts
 - T-shirts Items
 - 12-GGK799
 - Cotton T-shirts
 - New Shirt
 - Polo T-shirt
 - T-Shirts Sales Items
 - T-shirts
 - 18217-054
 - 18207-012
 - 18214-012
 - 18215-012
 - 18217-012
- Head Wear
- Footwear
- Safety
- Hardware
- Displays
- Furniture
- Automotive
- Building Products
- Electrical & Electronics
- Food and Beverage
- Kitchen
- Party Supplies
- Discontinued Products

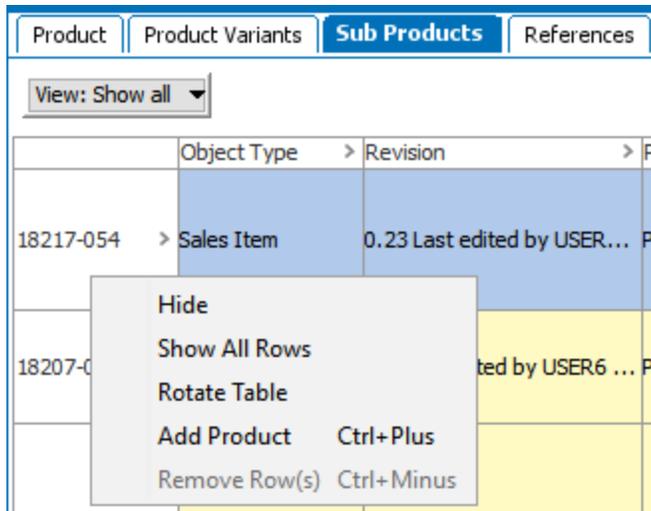
T-shirts rev.0
<
Product | Product Variants | **Sub Products** | References | Referenced By | Images & Documents | Commercial | Tables | Category Profile

View: Show all

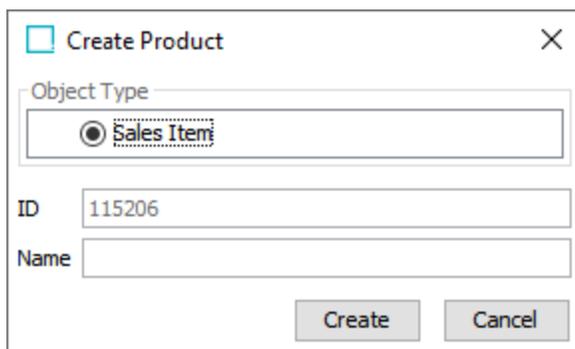
	18217-054	18207-012	18214-012
ID	100305	18207	18214
Name	18217-054	18207-012	18214-012
Object Type	Sales Item	Sales Item	Sales Item
Revision	0.23 Last edited by USER6 on Thu Ja...	0.4 Last edited by USER6 on Mon ...	0.5 Last edited by USER6 on Thu Ja...
Path	Primary Product Hierarchy/Products/...	Primary Product Hierarchy/Produc...	Primary Product Hierarchy/Products/...
Approved	✖ Last Approved on Fri Sep 16 10:...	✖ Last Approved on Mon Jun 15...	✖ Last Approved on Mon Jun 15 1...
Translation	Not Translated	Not Translated	Not Translated
Category	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18217-054	Classification 1 root Merchandising Hierarchy Apparel Sportswear T-shirts 18207-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18214-012
Parent	T-shirts	T-shirts	T-shirts
Selling Price		8.57 \$	8.57 \$
Annual Sales Forecast, Maximum		5000	5000
Annual Sales Forecast, Minimum		2000	2000
Description, Long	The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.	The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.	The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.
Description, Table			
Feature Bullet 1	Fiber Content: Fabric: 100% Ring-spun Cotton	Fiber Content: Fabric: 100% Ring-spun Cotton	Fiber Content: Fabric: 100% Ring-spun Cotton
Feature Bullet 2	Ultra-soft premium cotton feels great against your skin. ENG value test	Ultra-soft premium cotton feels great against your skin.	Ultra-soft premium cotton feels great against your skin.
Feature Bullet 3	Non-chafe fabric taping reinforces neck and shoulders.	Non-chafe fabric taping reinforces neck and shoulders.	Non-chafe fabric taping reinforces neck and shoulders.
Feature Bullet 4	Lay Flat collar keeps its shape wash after wash.	Lay Flat collar keeps its shape wash after wash.	Lay Flat collar keeps its shape wash after wash.
Feature Bullet 5	Durable double stitching trims sleeves and bottom hem.	Durable double stitching trims sleeves and bottom hem.	Durable double stitching trims sleeves and bottom hem.
Primary Color		Blue	Orange
Sales Item Short Description		T-shirt, Blue, M, cotton	T-shirt, Orange, L, cotton
Selling Price UOM		EA	EA
Size		Medium	

Right-clicking on any field within the table will expose additional options, including Copy, Paste, Hide Equal, and Mark Different selections - all of which are self-explanatory and can be especially useful when editing multiple objects.

Note that two views are available using the **Rotate Table** option. As shown above, the view can be organized to have attributes on the vertical axis. As shown below, the table can also display products on the vertical axis. Also note that right-clicking within the header field exposes different options than within the data fields, including an option to add a product.



Selecting **Add Product** opens a Create Product dialog allowing the user to input data to create a new object, which will be added as a child to the currently selected node. The options available in the dialog are based on the data model defined in System Setup. For example, the object type selection will vary based on the allowable object types under the selected parent, and ID will only be available for population if the object type being created does not have autogenerated IDs applied.



Note: The same functionality is available using the **Add Product** link at the bottom of the Sub Products editor.

Recycle Bin for Tree

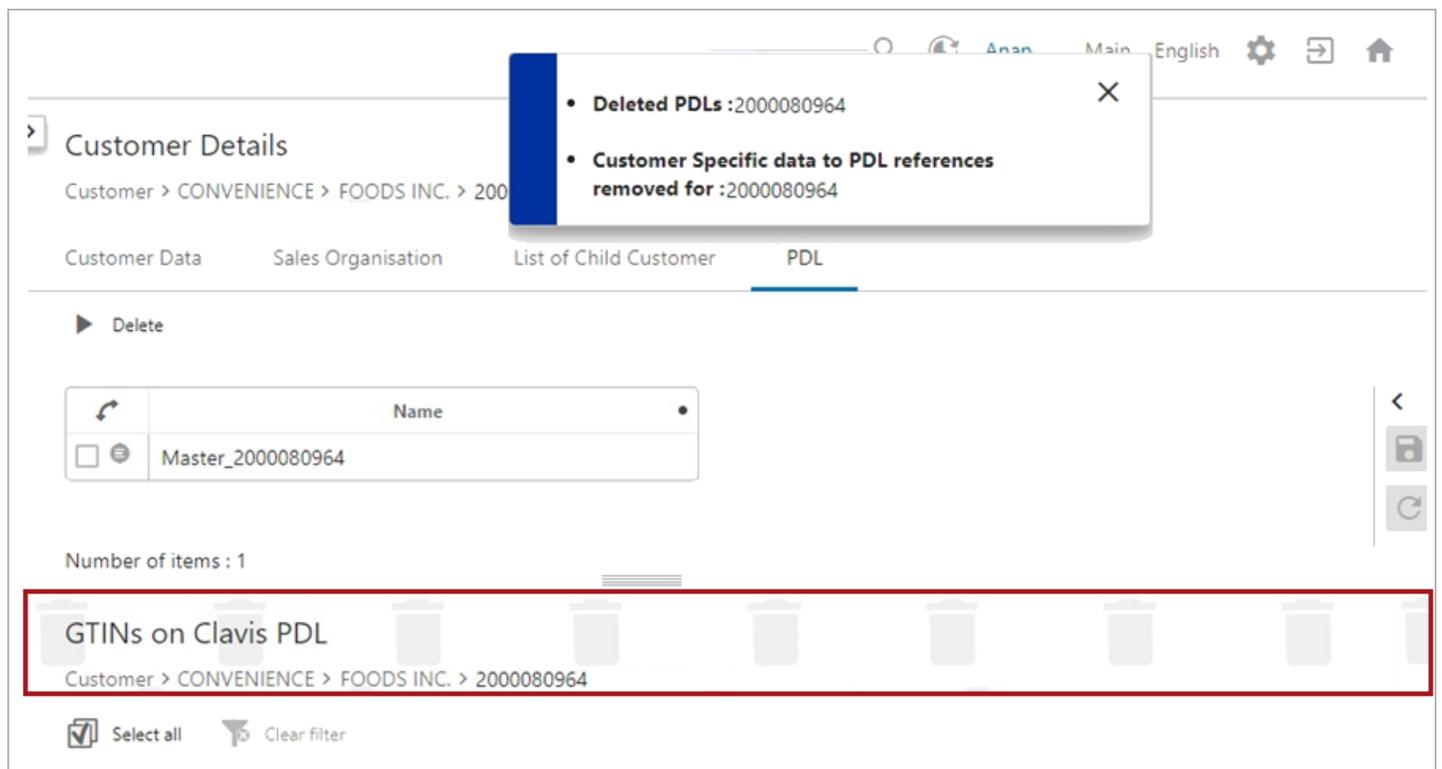
This topic describes the functionality available for objects within the Tree Recycle Bin. For information on the System Setup Recycle Bin, see the **Recycle Bin for System Setup** topic in the **System Setup / Super User Guide**. For information on deleting objects from Tree, see the **Deleting Objects in Tree** topic within this **Getting Started / User Guide**.

Important: Objects in the Recycle Bin are not searched when a user performs a search in workbench and Web UI. This limitation also applies to searches done using the workbench Goto functionality. Additionally, attribute values of objects in the Recycle Bin cannot be edited. If editing is required, the object needs to be revived.

When an object is deleted from Tree, it is moved to the Recycle Bin located on the Tree tab.

In Web UI, attempting to display an object that exists in the Recycle Bin, as shown below, recycle bin images fill the background of the object that is no longer in the primary product hierarchy. When the 'Show Recycle' parameter is checked in the Tree Navigator component, this background is displayed when viewing objects in the Recycle Bin. For more information, see the **Tree Navigator Component** topic.

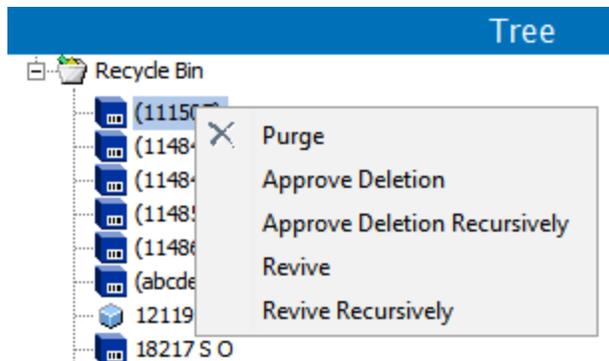
The user can use the revive or permanently delete steps below to remove this background and resolve the object's status.



Revive or Permanently Deleting Objects

To revive or permanently delete an object, right-click on it in the Recycle Bin and choose one of the options described below.

Note: Objects can also be purged from the Recycle Bin on a scheduled basis by using the 'Schedule Empty Recycle Bin' feature. For information on this functionality, see the **Schedule Empty Recycle Bin** topic in this guide.



- **Purge:** Permanently deletes the object, with no subsequent option for revival.
- **Approve Deletion:** Deletes the selected object from the Approved workspace, and passes a deletion event for that object. This option is only enabled on objects that are workspace revisable.

Note: Unless using the 'Force Delete & Purge' option from the Maintain menu, objects in the Recycle Bin that exist in the Approved workspace cannot be purged unless their deletions have first been approved. However, force purging an object without first approving the deletion will NOT result in a deletion event being captured. Therefore, if deletion events must be recorded for sending to downstream systems, the deletion should always be approved prior to the purge action being carried out. For more information on the 'Force Delete & Purge' option, see the **Deleting Objects in Tree** topic in the **Getting Started / User Guide** documentation. For more information on events, see **Events** in the **System Setup / Super User Guide**.

- **Approve Deletion Recursively:** Deletes the selected object and all of its children from the Approved workspace, and passes a deletion event for all impacted objects. This option is only enabled on objects that are workspace revisable.
- **Revive:** Revives the selected object, returning it to the location in Tree from which it was deleted. Note that object revival has some dependencies and objects may not always be revived exactly as they were prior to deletion. For example, if an object had references to other objects which have subsequently been deleted, those references will not be present upon revival.
- **Revive Recursively:** Revives the selected object and all child objects to their previous location in Tree. Note that object revival has some dependencies and objects may not always be revived exactly as they were prior to

deletion. For example, if an object had references to other objects which have subsequently been deleted, those references will not be present upon revival.

Schedule Empty Recycle Bin

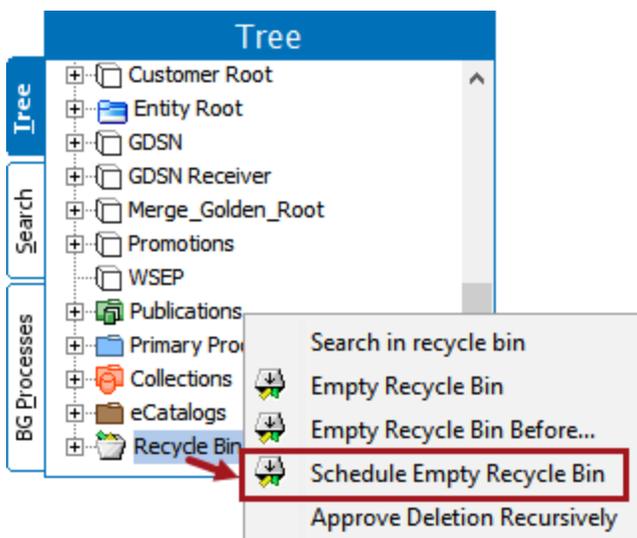
Objects within the Tree Recycle Bin can be automatically deleted and/or purged on a scheduled basis by using the **Schedule Empty Recycle Bin** feature. Recycle Bin emptying can be scheduled in a similar manner to how other processes are scheduled in STEP (e.g., data imports, data exports, and bulk updates). The ability to schedule Recycle Bin emptying at designated times, e.g., overnight, can help free users from time-consuming, manual Recycle Bin emptying tasks, allowing the Recycle Bin to be regularly emptied with minimal or no user intervention.

Note: Scheduling is not available for the System Setup Recycle Bin. For more information on the System Setup Recycle Bin, see the **Recycle Bin for System Setup** topic in the **System Setup / Super User Guide**.

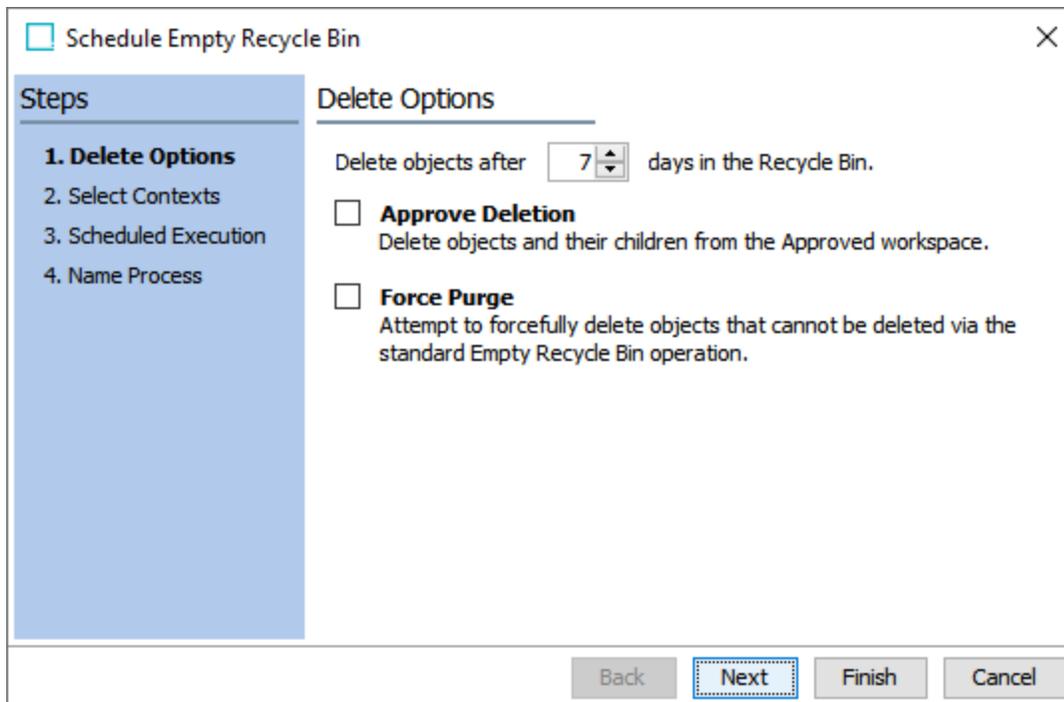
Configuring a Schedule Empty Recycle Bin Operation

To set a schedule for emptying the Tree Recycle Bin, follow these steps.

1. Right-click on the Recycle Bin in Tree and select **Schedule Empty Recycle Bin** to display the **Schedule Empty Recycle Bin** wizard.



2. On the **Delete Options** screen, choose the number of days that an object must be in the Recycle Bin before it is deleted, as well as whether you would like to approve deletions or attempt to force purge objects.



Schedule Empty Recycle Bin

Steps

1. Delete Options
2. Select Contexts
3. Scheduled Execution
4. Name Process

Delete Options

Delete objects after days in the Recycle Bin.

Approve Deletion
Delete objects and their children from the Approved workspace.

Force Purge
Attempt to forcefully delete objects that cannot be deleted via the standard Empty Recycle Bin operation.

Back Next Finish Cancel

The available parameters are:

- **Delete objects after __ days in the Recycle Bin:** Enter the number of days that an object must be in the Recycle Bin before it is deleted. The default value is 7.
- **Approve Deletion:** Select this option to remove objects and their children from the Approved workspace, which will send a DELETEAPPROVAL event.

The following considerations apply to the **Approve Deletion** parameter:

- The 'Approve Deletion' parameter is not affected by the value provided in the 'Delete objects after __ days...' parameter. As a result, when the Schedule Empty Recycle Bin operation runs, if 'Approve Deletion' is selected, *all* objects in the Recycle Bin will be removed from the Approved workspace, even if they have not been in the Recycle Bin for the specified number of days.
- When an object is removed from the Approved workspace via 'Approve Deletion,' a DELETEAPPROVAL event is generated for that object. However, if the object is subsequently purged from the Recycle Bin as part of the same Schedule Empty Recycle Bin operation, the event is also deleted, since the object that the event is related to no longer exists in the system.

Therefore, if you have an event-based OIEP set up to capture DELETEAPPROVAL events, it is recommended to schedule this OIEP to start at more frequent intervals than the Schedule Empty Recycle Bin process, since the DELETEAPPROVAL event may disappear before the OIEP has been invoked. For example, schedule the OIEP to start every minute and configure the Schedule Empty Recycle Bin process to run once a week.

- **Force Purge:** Select this option to attempt to forcefully delete objects from the Recycle Bin that cannot be deleted via the standard Empty Recycle Bin operation. For example, with this option enabled, objects in the

Approved workspace can possibly be force purged from the Recycle Bin without having first been removed from the Approved workspace through Approve Deletion.

Note: To use the Force Purge option, the user who configures the Schedule Empty Recycle Bin process must have the 'Force Delete and Purge' setup action included in their user privileges. For more information, see the **Setup Actions** topic in the **System Setup / Super User Guide** documentation.

3. On the **Select Contexts** screen, choose the contexts from which to delete objects.

Note: In the rare instance that there are additional workspaces on your STEP instance other than Main and Approved, this step will be named 'Select Workspace and Context' and a list of additional workspaces will display at the top of the wizard screen. Click the checkbox next to each workspace that you want to select.

Schedule Empty Recycle Bin

Steps

1. Delete Options
- 2. Select Contexts**
3. Scheduled Execution
4. Name Process

Select Contexts

Select the context(s) from which objects should be deleted.

Available		Selected
English UK	<input type="button" value="▶"/> <input checked="" type="button" value="↔"/> <input type="button" value="◀"/> <input type="button" value="◀◀"/>	Danish DK
French FR		English US
Germany DE		

2 context(s) selected

Back Next Finish Cancel

4. On the **Scheduled Execution** screen, determine when and how often to empty the Recycle Bin.

Schedule Empty Recycle Bin [Close]

Steps

- Delete Options
- Select Contexts
- Scheduled Execution**
- Name Process

Scheduled Execution

Start

Now Start at (hh:mm):
 Later Start on (yyyy-mm-dd):
 Weekly End on (yyyy-mm-dd):
 Monthly Every: Mon Sat
 Later and repeat Tue Sun
 Wed
 Thu
 Fri

Start every Mon 15:46:00 ET, starting Wed May 15 2019

[Back] [Next] [Finish] [Cancel]

- On the **Name Process** screen, give the batch process a name if desired, then click **Finish** to complete the setup. To create more than one scheduled process, complete all steps in the wizard again.

Schedule Empty Recycle Bin [Close]

Steps

- Delete Options
- Select Contexts
- Scheduled Execution
- Name Process**

Name Process

Batch Process Name:

[Back] [Next] [Finish] [Cancel]

- Scheduled Empty Recycle Bin processes are stored on the BG Processes tab under Scheduled Processes > Queued Processes and display a status of 'waiting.' They can be edited by clicking the 'Edit' button in the

Status row.

BG Processes

- Revive Recursively
- RuleSetExporter
- RuleSetImporter
- STEP Workflow Profiling
- Scheduled Empty Recycle Bin
- Scheduled Processes**
 - Queued Processes
 - Weekly Scheduled Recycle Bin Purge**
- Active Processes
- Ended Processes
- Seal Change-Package
- Smartsheet Export
- Smartsheet Import
- StateflowDeadline
- SuspendBGPs
- Translation
- Translation Import
- Unique Key Processes
- Unlink Object Type
- Update actual page from plan
- UploadDTPDocument
- Web UI Asset Pipeline Download
- Web UI Download
- Web UI Upload

Weekly Scheduled Recycle Bin Purge - Background Process

Background Process

Properties	
Property	Value
Started by	USER4
Id	BGP_312240
Description	Weekly Scheduled Recycle Bin Purge
Schedule	Every Sun 01:00:00 ET, starting Fri Jun 21 2019
Execution Server	doc-dev
Status	waiting Edit
Created	Fri Jun 21 11:26:28 EDT 2019
Started	Fri Jun 21 11:26:30 EDT 2019
# of warnings	0
# of errors	0
Next Run	Sun Jun 23 01:00:00 EDT 2019

Execution Report

- 1 Context ID(s): Context1 (Fri Jun 21 11:26:28 EDT 2019)
- 2 Workspace ID(s): Main (Fri Jun 21 11:26:28 EDT 2019)
- 3 Delete Objects after limit: 7 (Fri Jun 21 11:26:28 EDT 2019)
- 4 Approve deletion: true (Fri Jun 21 11:26:28 EDT 2019)
- 5 Force Purge: false (Fri Jun 21 11:26:28 EDT 2019)

Navigating and Searching

This section describes the many different ways you can access specific data in the workbench. STEP Workbench offers rich functionality for finding both System Setup and Tree objects based on various criteria. Whether it be by standard navigation, Bookmarks, searches using basic, advanced, or drill-down functionality, STEP provides many ways to locate the required data.

This section will allow users to:

- Navigate hierarchies
- Find data quickly using the **Goto** function
- Find data using basic and advanced searches
- Perform drill-down searches using the **Search Result Profiling** page
- Use standard and **Search Bookmarks**

Note: Objects within the Recycle Bin are not searched and will not display in search results.

For information on search functionality in the Web UI, see the **Homepage Widgets** topic and the **Advanced Search** topic in the **Web User Interfaces / Web UI Setup and User Guide** documentation.

Navigation

You can navigate the STEP tree structures in the same manner as you navigate Windows folder structures. Basic desktop computer skills are prerequisites for all users of the STEP system.

Expanding a Folder

Use one of the following methods to display the contents of a folder:

- Click the plus sign (+) to the left of a folder
- Double-click a collapsed folder

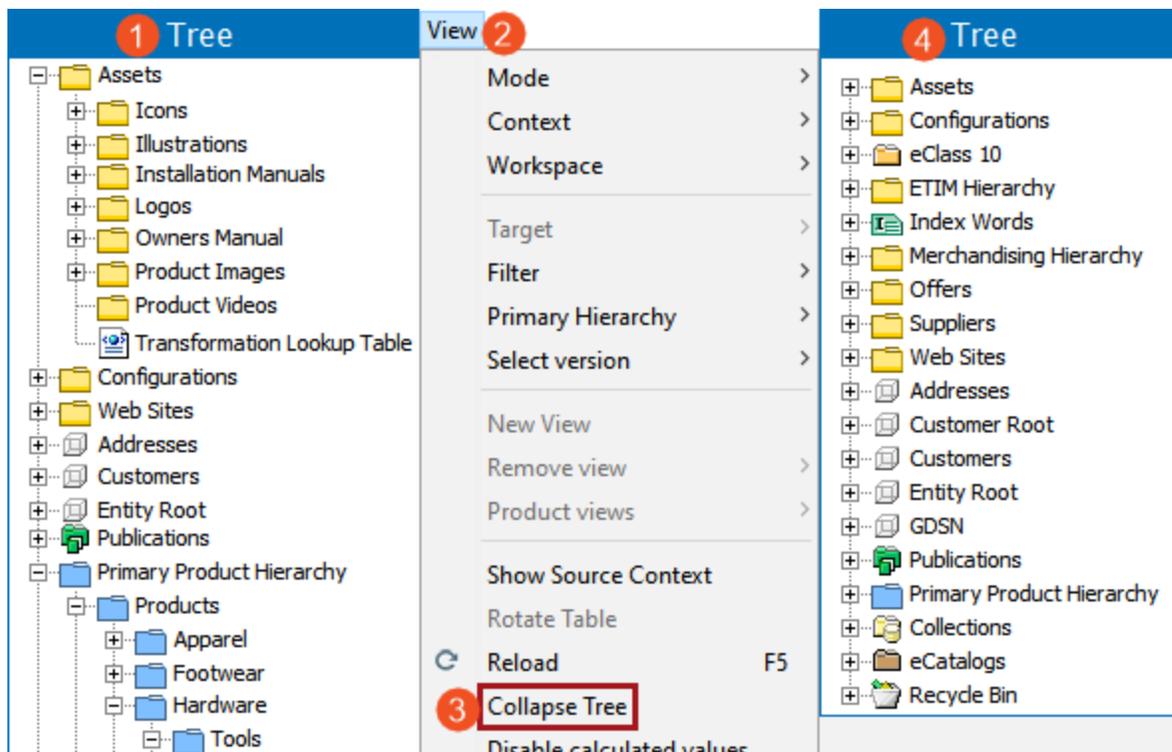
Collapsing a Folder

Use one of the following methods to hide the contents of a folder:

- Click the minus sign (-) to the left of a folder
- Double-click on an expanded folder

Collapse Tree

When folders in the Tree hierarchy are expanded, all can be collapsed by using the 'Collapse Tree' option from the 'View' menu.



Note: Folders too many sub nodes display an (x) and cannot be expanded in the hierarchy. To view objects beneath such folders, use the search or Goto functionality. For more information, see the **Goto** topic.

Navigating and expanding folders and sub folders can be done in any tab. However, when in the Workflow tab, first open a flipper to display the processes.

The screenshot displays the 'STEP Workflow' interface. At the top, there are tabs for 'Tasks' and 'Profile'. Below the tabs, a search bar is visible with the text 'Filter by Collection' and a dropdown arrow. A list of workflow tasks is shown below the search bar, including 'Start', 'Update', and 'End'. The 'Update' task has a count of 0. Below the list, there are several workflow items, each with a circular icon and a name: 'Business_Action', 'Clerical Review 2', 'Conditionally Mandatory WF', 'Contact Workflow', 'Contract Agreements', 'Contract Agreements(2)', 'Customer Web UI Workflow', 'Item Creation', 'Lead Pipe Plumbing Check', 'Order Process', 'Product Awaiting Asset', 'Publications', 'Publication Sections', 'Remove_object_from_Workflow', and 'Workflow with Deadlines'. The 'STEP Workflow' tab is highlighted in blue on the left side of the interface.

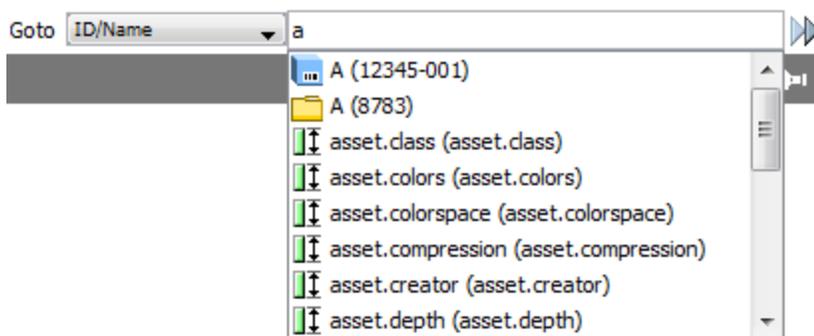
Goto

The **Goto** functionality allows the user to locate an object in STEP in a quick and efficient manner. There are two 'Goto' features:

- **Goto** - A quick way to jump to a particular object in the database based on the name and/or ID. If there are multiple hits, it displays the first one. Press 'Ctrl+G' to move the cursor to the Goto parameter.
- **Goto Next** - When there are multiple hits from the 'Goto' function, the user can opt to select Goto Next to continue on to the next hit. Press 'Ctrl+E' to display the next Goto Next item.

Type in the **Name** or **ID** of an object in the **Goto** field, press Enter or click the **Goto next object** button to the right of the field, and the system will take you to the object without displaying a list of search results.

Once you start typing in the **Goto** field, the system will suggest objects matching the typed-in text (case insensitive) and display them on a dropdown menu as shown below.



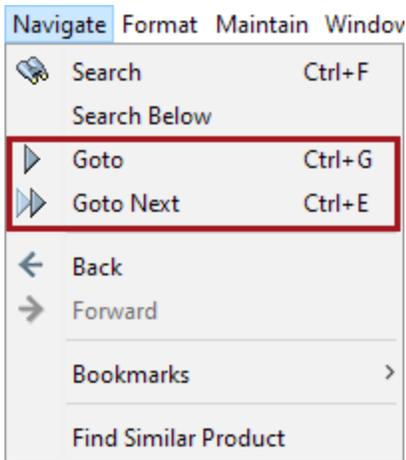
When typing in the 'Goto' field all objects are searched not just products. This includes but is not limited to classifications, assets, attributes, user names, etc.

It is important to keep in mind that:

- Object IDs and Names are both searched.
- Object IDs are searched case-sensitive.
- Object Names are searched case-insensitive.
- Wild Cards are not allowed

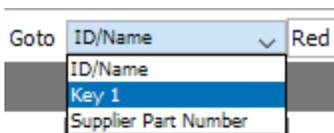
Items can be selected from the menu using either the mouse or the keyboard up arrow and down arrow keys. A maximum of 20 items will be displayed.

Another way to find the Goto and Goto Next options is in the Navigate menu.



Keys in the Goto function dropdown

The ID/Name dropdown list in Goto function will have any created keys as part of the dropdown list.

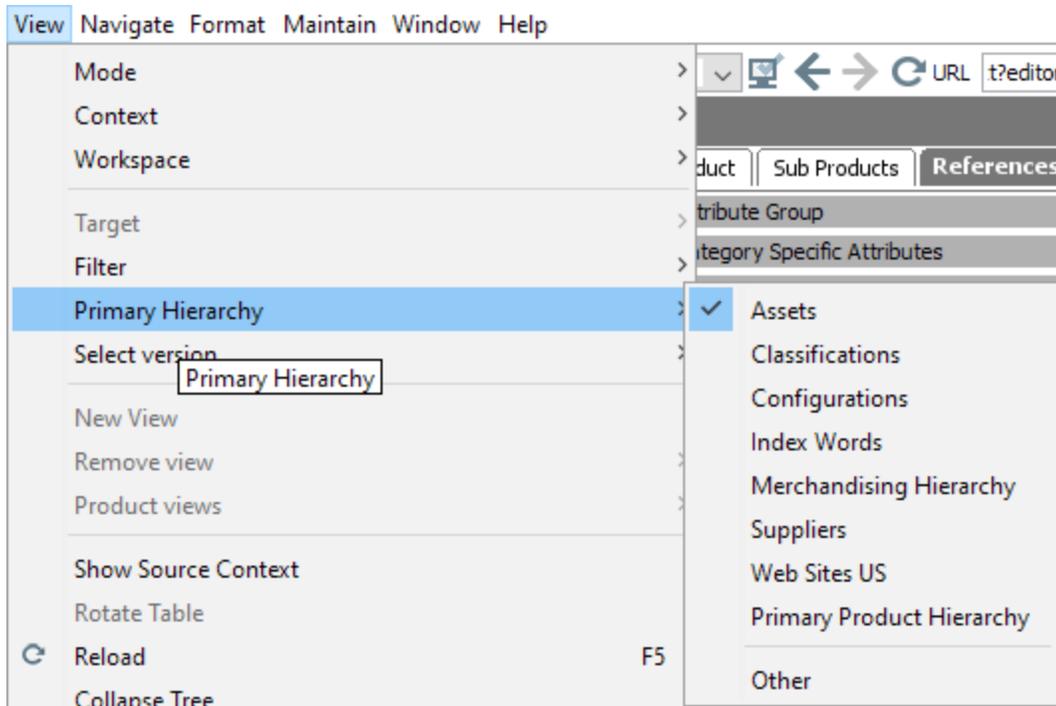


Note: Only activated keys can be seen in the Goto function dropdown list. See the **Creating and Deleting Keys** topic in the **Data Quality** documentation.

Selecting a key from this dropdown can be used to identify and delete objects, parents, referenced objects, and assets. The system will take the user to the product that has the unique key value stored on that object.

Setting the Primary Hierarchy for 'Goto' searches

A user can set the Primary Hierarchy to be either a Primary Product Hierarchy, Classification folder, Asset Folder, etc, through the View > Primary Hierarchy Menu. Once the primary hierarchy is selected and an object is searched, first priority is given to the folder that is selected and then the other folders will be searched.



For example, if the View > Primary Hierarchy is set to Assets, the product will first be searched under Assets. Then when clicked on Search again, the user will be shown in the actual hierarchy where the product was initially created. In normal circumstances, the product will by default be searched in the actual hierarchy where it was initially created.

Important: Objects within the Recycle Bin are not searched as part of the Goto functionality.

Bookmarks

Bookmarks in STEP are placeholders created by the user that serves as a shortcut for previously viewed objects.

In the STEP system, there are two types of bookmarks:

1. Standard Navigation **Bookmarks**
2. **Search Bookmarks**.

Note: Bookmarks are stored on the local STEP system and are not accessible when logging into STEP from a different computer.

Standard Navigation Bookmarks

Standard navigation bookmarks are used for quickly accessing specific nodes in the Tree and System Setup hierarchies.

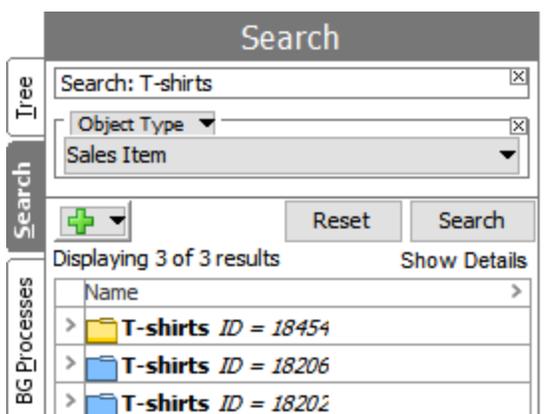
You can add a standard navigation bookmark by selecting a node in the hierarchy and clicking **Add Bookmark** in the **Navigate: Bookmarks** menu or alternately by using the Ctrl+D keyboard shortcut. The bookmark will afterward be accessible in the left side Bookmarks tab.

Search Bookmarks

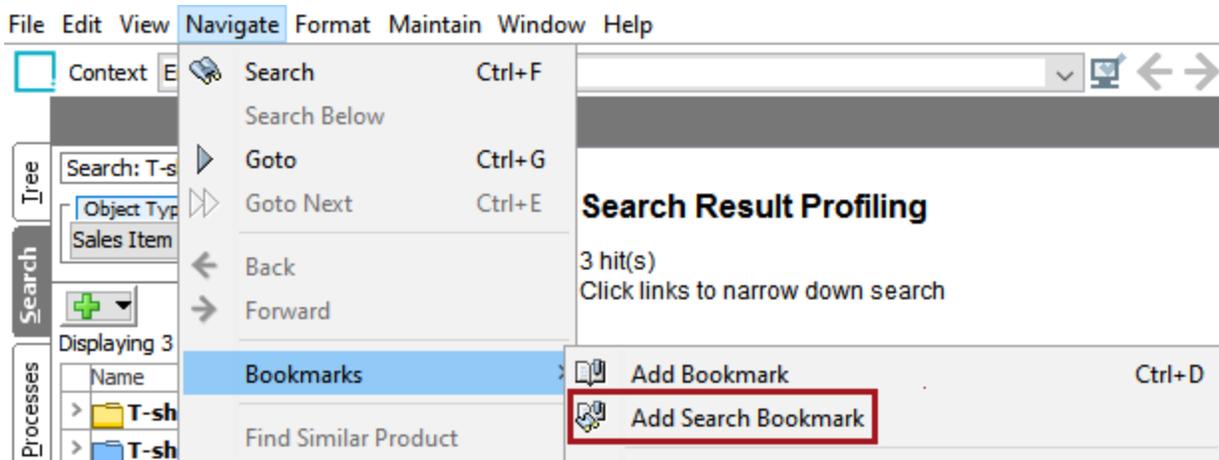
Search Bookmarks are used for storing specific searches that can then easily be re-run.

Steps to add a Search Bookmark:

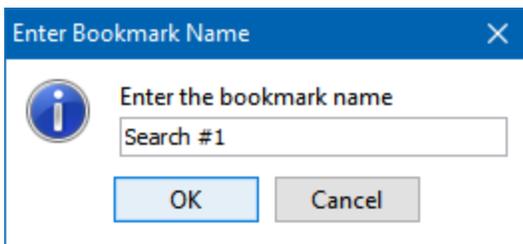
1. Create a search criteria in the Search tab.



2. Go to Navigate > Bookmarks
3. Select 'Add Search Bookmark'



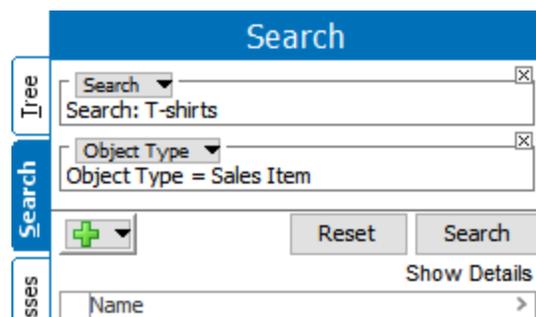
4. A dialog will be displayed to type in the bookmark name.



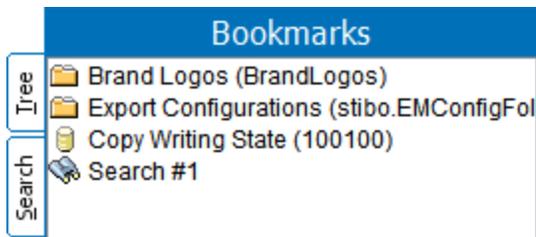
5. Click on OK button.

Accessing the Saved Search Bookmark

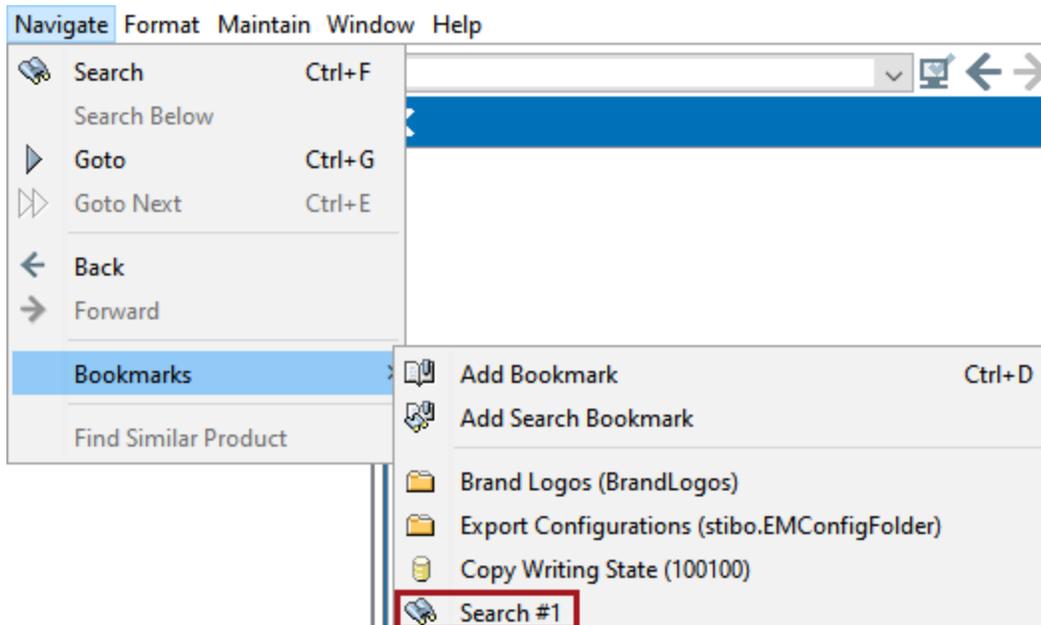
When you click on a stored search bookmark, the search parameters will be populated. Select Search to rerun the search.



Note: Search bookmarks are saved under the Bookmarks tab with a search icon labeled with the bookmark name provided by the user.



Saved bookmarks can also be found in the under the Navigate > Bookmarks.



Editing a Bookmark

Both standard navigation and Search Bookmarks can be edited in the Bookmarks tab by right-clicking the bookmark and selecting **Edit Bookmark** in the context menu. It is possible to edit the name of the bookmark and also the object / search URL if the **Edit URL** checkbox is activated.

Removing a Bookmark

Both standard navigation and Search Bookmarks can be removed from the Bookmarks tab by right-clicking the Bookmark in the tab and selecting **Remove Bookmark** on the context menu.

Search

The **Search** tab, in combination with the **Search Result Profiling** page, offers extensive methods for locating objects in STEP quickly and efficiently.

Generally, there are two approaches to performing searches:

1. If you know specific details about the object you wish to find, use the **Search** tab. For example, all products where the value for the attribute 'Weight' is less than '5 kg', the object is located below the product folder 'Office Chairs' and is not of the object type 'Item'.
2. If you do not know details, start with a broad search and then narrow it down using the **Search Result Profiling**.

Note: Objects in the Recycle Bin are not searched and will not display in search results.

Search Elements

The elements on the Search tab work together to create and refine a search for objects in STEP. The numbered elements in the following image are described below.

1. Search criteria type selector - Click the text to display a list of available search criteria options. See the **Search Functionality** topic for more information.
2. Add criteria / operator button - Click the green plus button () to add a new search criterion or hover the mouse over and hold down the green plus button () to display a sub menu and choose an **OR** operator or an **Exclude** operator. See the **Search Functionality** topic for more information.

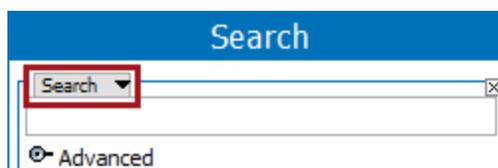
3. Remove search criteria button - The X button clears an individual criteria from the search. Click the Search button to refresh the Results Area.
4. Reset button - Clears all results and search criteria from the Search panel and Search Result Profiling page.
5. Search button - Runs the defined search.
6. Search result counts - The number of items currently displayed and total number of items found by the search. If the search finds objects not visible in the current context or objects that you are not privileged to see, a message is displayed and the objects are not displayed in the search result.
7. Show Details / Hide Details toggle - Hyperlink shows or hides search result details. The details view displays asset thumbnails. The asset thumbnail is displayed when the search is under a classification folder and there are assets. Similarly, if the search is for the products and the product is linked to an asset, the thumbnail is displayed. If no image is linked, 'No Primary Image' is displayed.
8. Search results list - When a search has been executed, the results are shown in a list below the search box. Clicking one of the results will open the object editor for that particular object in the Search Results Profiling pane, while continuing to display the search results list. It is also possible multi-selection from this list and a maximum of 100 results are displayed. The complete result set can be viewed, exported, or updated using the 'Operations on Entire Result' options below.

Note: The maximum results displayed can be adjusted via the case-sensitive 'DrillDownSearch.Maxresults' property in the sharedconfig.properties file. However, it is not advisable to adjust the number more than 100+ as this will diminish system performance as the number increases.

9. Save as Collection button - Click to open the 'Save as Collection' dialog and save the entire result set as a collection. Collections are available on the Tree. See the **Search Operations on Entire Result** topic for more information.
10. Export button - Click to open the Export Manager wizard and export the entire result set to a specified file type. See the **Search Operations on Entire Result** topic for more information.
11. Bulk Update button - Click to open the Bulk Update wizard and modify a variety of elements on each item for the entire result set. See the **Search Operations on Entire Result** topic for more information.
12. Search Result Profiling - Panel displays profiling information about the search including categories and provides a convenient way to further refine the search. See the **Search Result Profiling** topic for more information.

Search Options

The Search tab dropdown includes a number of options. Each is described in greater detail in the topics that follow.



- Object Type
- Search Below
- Referenced Assets
- Revised Objects Changed Since
- Data Containers
- Search from List
- JavaScript Search
- Missing Mandatory Values
- Unapproved
- Product Override Search
- Search in Publication Hierarchy
- References
- Referenced By
- STEP Workflows
- Sample Result
- Translation Status
- Unpushed or Failed Assets

For information on performing optimal searches, see the **Scheduled Process Recommendations** topic in the **System Administration** documentation.

Search Functionality

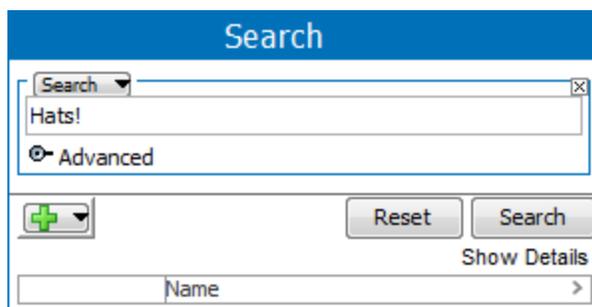
This section describes the different types of search criteria available in the STEP system as well as some basic search functions.

Important: Calculated attribute values are generated on-the-fly. Searching for the value of a calculated attribute is not allowed since generating all possible calculations would cause substantial performance issues.

Standard Search Criteria

The standard search criteria named 'Search' allows you to find objects based on name, ID, attributes and their values.

A text string entered in the search field will search for object names, IDs, or attribute values where the text occurs.



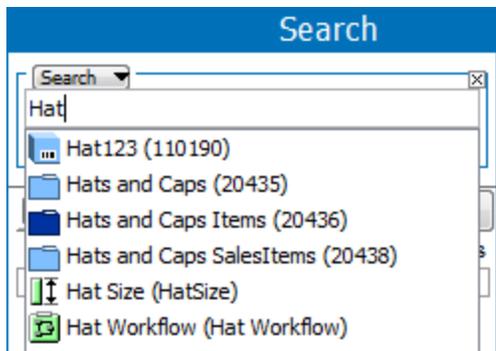
The screenshot shows a search interface with a blue header labeled 'Search'. Below the header is a search input field containing the text 'Hats!'. To the left of the input field is a dropdown menu with 'Search' selected. Below the input field is a radio button labeled 'Advanced'. To the right of the input field are 'Reset' and 'Search' buttons. Below these buttons is a 'Show Details' link. At the bottom of the interface is a dropdown menu with 'Name' selected and a right-pointing arrow.

If you enter a text string and click the Search button, search finds objects with an ID, and/or a name and/or an attribute and/or their values matching the entered string. You can further refine standard searches as shown below.

Note: By default, standard searches are case insensitive for name and attribute value searches, but are case sensitive for ID searches. You can make name and attribute value searches case sensitive using the Advanced option 'Match Case on Names and Values.' For more information on the options available under advanced, see the **Search: Advanced Options** topic.

Search Field Typeahead

Once you start typing in the standard search criteria text field, the system suggests possible entries matching the typed in text (case insensitive), and displays them on a dropdown menu as shown below.



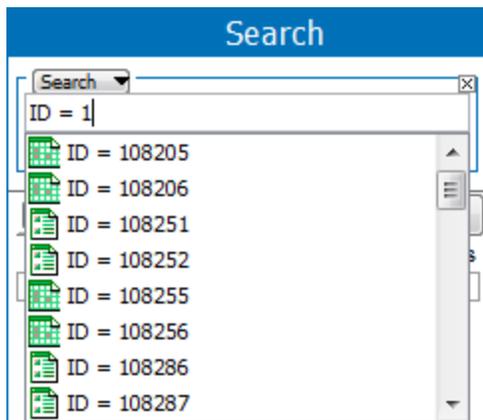
In the typeahead menu, objects are displayed with their relevant icon, then name, and then ID in brackets. Attribute values are shown as text.

Items can be selected from the menu using either the mouse or the keyboard 'arrow up' and 'arrow down' keys. A maximum of 100 items will be displayed.

Note: Using `sharedconfig.properties` entries, it is possible for a system administrator to control the behavior of the typeahead. E.g., after how many entered characters should suggestions be shown, etc. Search for the 'TypeAhead' section on the Configuration tab. For more information, see the **Configuration** topic in the **Administration Portal** documentation.

Limiting Results to Matches on IDs

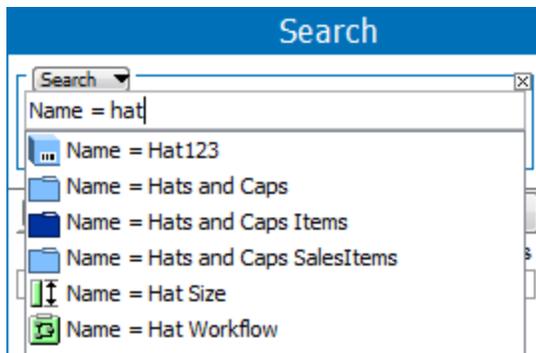
You can limit standard searches to match on ID only by entering 'ID = ' at the beginning of the text field as shown below.



'id' and 'Id' will also work, as the spaces on each side of the equals sign are optional.

Limiting Results to Matches on Name

You can limit standard searches to match only on name by entering "Name = " at the beginning of the text field as shown below.



"name" and "NAME" will also work since the spaces on each side of the equals sign are optional.

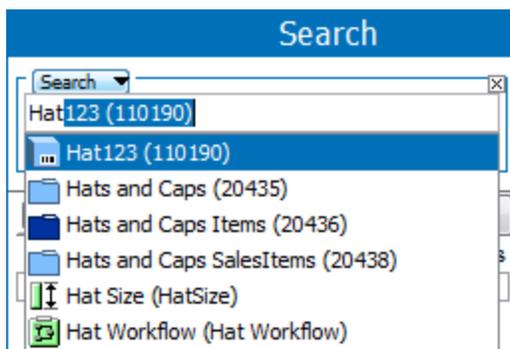
Attribute Value Searches

Using a standard search, you can limit the result to only match on values for specific Attributes.

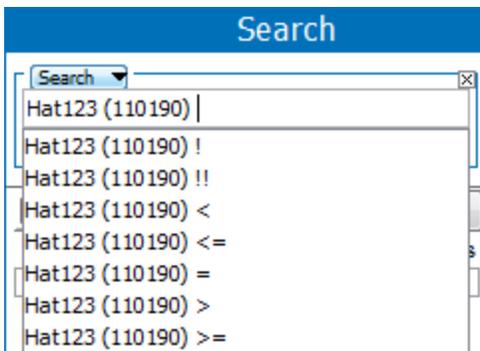
Important: Calculated attribute values cannot be searched since they are generated only when viewed or processed.

There are at least three ways to construct an attribute search query:

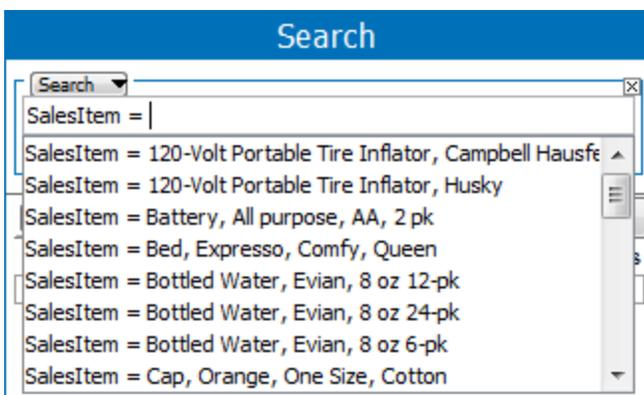
1. Start entering an attribute name or ID, then select the relevant attribute from the typeahead menu, after which "Attribute Name (Attribute ID)" is inserted in the text field, then enter a search operator or enter a SPACE and select an operator from the typeahead menu and enter the value to search for.



2. Enter the attribute ID (case sensitive), enter a search operator or enter a SPACE and select an operator from the typeahead menu, then enter the value to search for.



3. Enter the attribute name (case insensitive), enter a search operator or enter a SPACE and select an operator from the typeahead menu, then enter the value to search for.



Note: As shown on the screenshot above, if you have the required privileges you will get typeahead suggestions on existing values after having specified a search operator.

Attribute Value Search Operators

The following search operators that can be used when performing attribute value and reference metadata attribute value searches.

Operator	Description
<	Less than operator. Only works for number validated attributes (Validation Base Type = number, integer or fraction)
<=	Less than or equal to operator. Only works for number validated attributes (Validation Base Type = number, integer or fraction)

Operator	Description
=	Equal to operator.
>	Greater than operator. Only works for number validated attributes (Validation Base Type = number, integer or fraction)
>=	Greater than or equal to operator. Only works for number validated attributes (Validation Base Type = number, integer or fraction)
!	Operator used for finding objects where the specified attribute does not have values in current context. Note that the search does not check whether the attribute is valid for a given object. Also, if the specified attribute has an inherited value (not a local value), then the object will be listed in the results set even though the value field is not empty.
!!	Operator used for finding objects where the specified attribute does not have local values in any context. Note that the search does not check whether the attribute is valid for a given object. Also, if the specified attribute has an inherited value (not a local value), then the object will be listed in the results set even though the value field is not empty.

Wildcards in Searches

Two following two wildcards are available for performing searches on partial text strings:

- * (asterisk), multi-character, represents any number of characters in a string
- ? (question mark), single character, represents exactly one character

Wildcards can be used anywhere in the text string.

Note: Searches starting with a wildcard should be avoided since they are significantly slower than other searches.

Searches in 'Full Text Indexable' Attribute Values

Searches in values for attributes configured with the 'Full Text Indexable' parameter set to 'Yes' do not work in the same manner as searches in other attribute values. Apart from common English words like 'in' and 'as,' each word is indexed as a separate element. For more information about the words that are not indexed, search the Oracle website for the 'English Default Stoplist.'

For example, consider an attribute named 'Description' that has the following value on a given product:

Black powder coated die-cast aluminum enclosure. Textured surface. Bulk version: Enclosures may possibly have flaws in the finish such as scratches, dents, discoloration, etc.

- If the 'Full Text Indexable' parameter is set to 'Yes' for the attribute, a search for 'Description = aluminum' returns the product.
- If the 'Full Text Indexable' parameter is set to 'No' for the attribute, a search to find this product would require a wildcard on both sides of the 'aluminum' text like this: 'Description = *aluminum*.'

Note: Searches starting with a wildcard (as shown above) are significantly slower than other searches.

By default, if you have not specified an attribute, typeahead for Full Text Indexed attribute value entries is turned off. If you have specified an attribute, you will first get typeahead suggestions after having entered three (3) characters of the value entry. See the 'Search Field Typeahead' section above.

Numeric Value Searches for Attributes with Units

Values for numeric searches with no units are assumed supplied in the default unit for the attribute. For example, if kg is the default unit for the 'Weight' attribute, 'Weight = 1' will match '1 kg' and '1000 g'. If no default unit is configured, the search 'Weight = 1' will only match the value '1' with no unit.

ISO Date Searches

If an attribute with the validation type of 'ISO Date,' where the date populated in the field is in the YYYY-MM-DD format, a search on the populated attribute on objects can be performed using the following key words in the Search tab: now, today, tomorrow, yesterday.

While it does not matter if the 'ISO Date' is set to 'Strict Validation' or not, it does matter that the date is written in the YYYY-MM-DD format. Any other format, including using slashes '/' instead of dashes '-' will not work since searches work by matching only values conforming to the ISO standard (with dashes). For this reason, it is recommended that 'Strict Validation' be set to Yes, otherwise, the stored values are not guaranteed to be searchable.

In the example below, a user searched for an object that has a particular date. The user typed in the name of the date attribute 'ISO Date', and then used an 'attribute value search operation' followed by the keyword 'tomorrow.' Then they narrowed their search even further to just under one particular node, giving them the desired results.

Search

Advanced

Displaying 1 of 1 results Show Details

Name
flashlight case ID = 129666

<

Search Result Profiling

1 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(1\)](#) - [exclude](#)

[Item \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results below child nodes of Flashlights Items

[flashlight case \(1\)](#) - [exclude](#)

Results by Parent

[Flashlights Items \(1\)](#) - [exclude](#)

Combining Search Criteria

You can combine different search criteria to create advanced searches. Except for cases where one or more 'OR' operators are used, the sequence of the criteria does not matter.

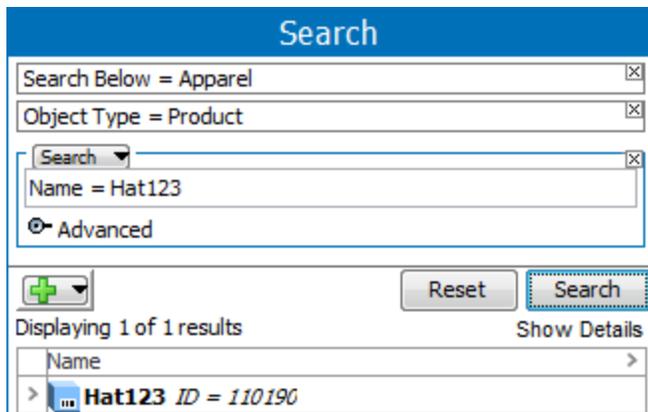
The search shown below:

Search

Displaying 1 of 1 results Show Details

Name
Hat123 ID = 110190

...will generate the same results as:



Search

Search Below = Apparel

Object Type = Product

Search

Name = Hat123

Advanced

Reset Search

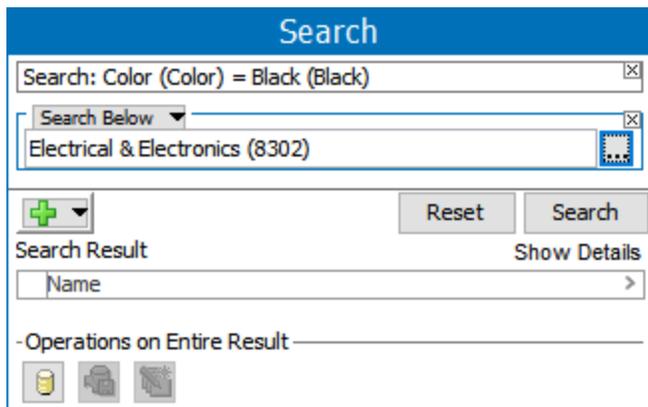
Displaying 1 of 1 results Show Details

Name
> Hat123 ID = 110190

When not using 'OR' operators or 'Exclude' search criteria, all criteria are combined with an implicit 'AND' operator.

Click the add criteria button (+) to construct a query that includes more than one criteria. By default, the criteria will be 'AND,' meaning that all criteria will be met for the results.

As an example, the search shown below will find objects that have the value 'Black' for the 'Color' attribute AND that are present below an 'Audio Visual Equipment' hierarchy node. The order of criteria does not impact the results.



Search

Search: Color (Color) = Black (Black)

Search Below

Electrical & Electronics (8302)

Reset Search

Search Result Show Details

Name
>

-Operations on Entire Result-

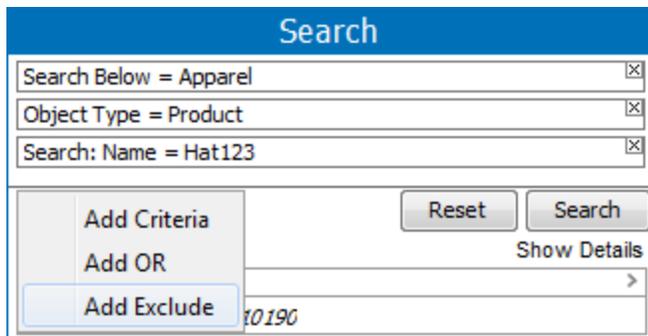
Icons: Print, Copy, Paste

For information on constructing your search using 'Exclude' search criteria and 'OR' operators, see below.

Using 'Exclude' Search Criteria

It is possible to negate all the different types of search criteria using the 'Exclude' search criteria functionality.

You can add 'Exclude' search criteria to search either by clicking and holding the add criteria button (+), then selecting 'Add Exclude' from the menu that displays (shown below). Criteria can also be excluded by clicking an 'exclude' link on the generated 'Search Result Profiling' panel.



Search

Search Below = Apparel

Object Type = Product

Search: Name = Hat123

Add Criteria

Add OR

Add Exclude

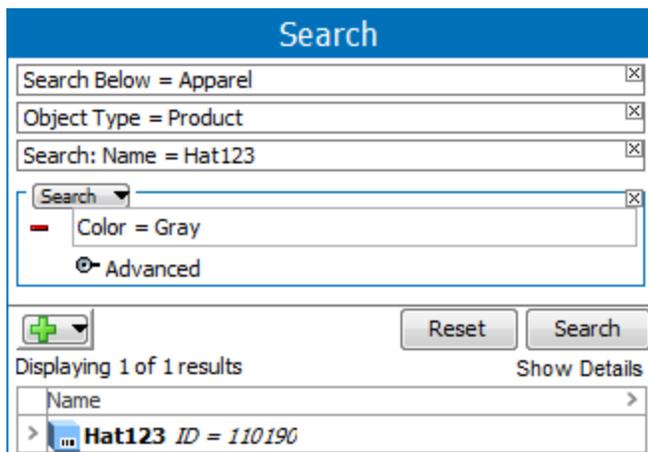
Reset

Search

Show Details

10190

'Exclude' search criteria appear with a red minus icon on the left side of the criteria panel (shown below).



Search

Search Below = Apparel

Object Type = Product

Search: Name = Hat123

Search

Color = Gray

Advanced

Reset

Search

Displaying 1 of 1 results

Show Details

Name

Hat123 ID = 110190

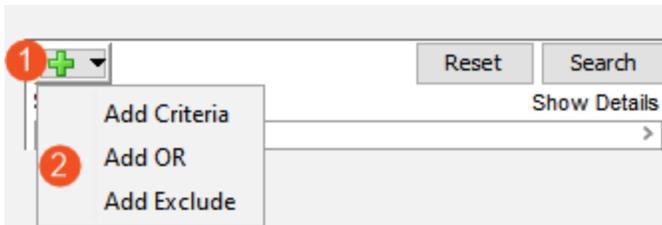
When no 'OR' operators are used, the sequence of 'Exclude' search criteria does not affect the results.

Continuing with the example above, the search finds objects where all the 'positive' criteria are met, minus objects where the attribute 'Color' is 'Gray.'

Note: Use as many 'Exclude' search criteria as needed. Keep in mind that the 'Exclude' criteria are subtracted from the 'positive' search results, so a search containing only an 'Exclude' search criteria without an 'Include' criteria as point of departure will not generate any results.

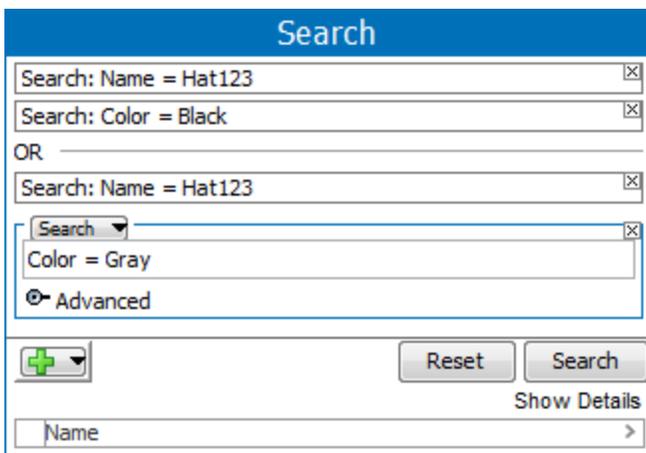
Using the 'OR' Operator

Add an 'OR' operator to search by clicking and holding the add criteria button () , then selecting 'Add OR' from the menu that displays (shown below).



When using 'OR' operators, search is divided into separate parts containing one or more criteria. Each part is, in effect, executed separately and the results are then added before presenting the final result.

As it is not possible to work with parenthesis, when working with 'OR' operators it is often necessary to configure the same criterion on both sides of an 'OR' operator. As an example, the search shown below will return all objects where the name starts with the text 'Hat123' and the color is 'Black,' plus all objects where the name starts with the text 'Hat123' and the color is 'Gray.'



Search Result Profiling

The **Search Result Profiling** page appears when you have run your search. The page displays statistics about the search grouped under the headers **Results by Object Type**, **Results by Position in Tree Hierarchy** and **Results by Value**. Apart from giving you information about the results of your search, you can use the page to further refine your search. Thus, if you start by running a broad search, you can refine it by clicking the links 'Exclude' in the profile - thereby adding additional criteria to your search. See the example below:

Search Result Profiling

87 hits
Click links to narrow down search

Results by Object Type

[Product \(78\)](#) - [exclude](#)

 [Product \(78\)](#) - [exclude](#)

[Asset \(8\)](#) - [exclude](#)

 [TIFF Image \(7\)](#) - [exclude](#)
 [JPG Image \(1\)](#) - [exclude](#)

[Attribute \(1\)](#) - [exclude](#)

When exclude option is clicked, an additional search criteria called 'Add Exclude' is added as shown below:

Search

✕
 Search Below = Primary Product Hierarchy

✕
 Search: Object Type (getObjectType)

✕
 Search Excellence (I-Excellence)

⊕ Advanced


Reset
Search

Displaying 100 of 1232 results Show Details

Name
>  7130-03-FR ID = 6854
>  7132-06 ID = 8093
>  7133-12 ID = 8081

For all types of searches, the **Search Result Profiling** page will display the results sorted by **Object Type**. The screenshot above shows the **Results by Object Type**. The search result includes 78 **Products** of the **Object Type** "Product", 8 **Assets** (where 7 are of the **Object Type** "TIFF Image" and 1 is of the **Object Type** "JPG Image") and finally 1 **Attribute**.

If you click **TIFF Image**, an **Object Type Search Criteria** is added to the search. The search runs again, finding only objects with the **Object Type** "TIFF Image."

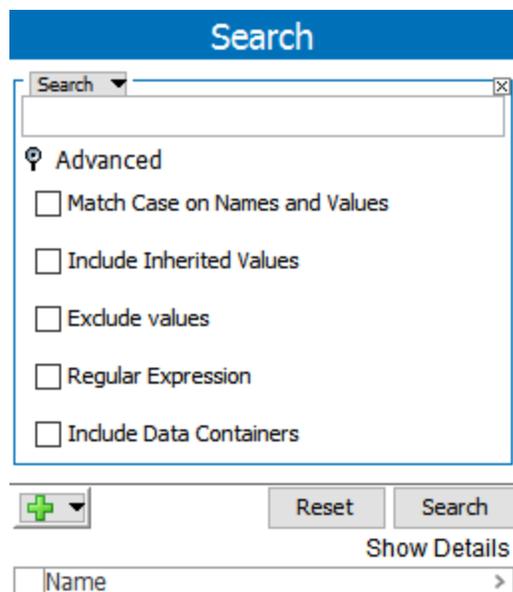
If you click **exclude** next to **TIFF Image**, an **Object Type Search Criteria** is added to the search, but this time as an **Exclude Criteria**. Hence, all objects of the **Object Type** "TIFF Image" will be excluded from the search result.

Search: Advanced Options

Additional options for narrowing a search can be accessed under the **Advanced** flipper in Search.

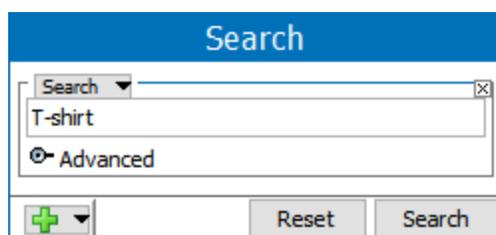
Each of the following advanced options is described in the following sections:

1. Match Case on Names and Values
2. Include Inherited Values
3. Exclude Values
4. Regular Expression
5. Include Data Containers



1. **Match Case on Names and Values** - When selected, **Name** and **Attribute** value searches are not case sensitive.

For example, this is a basic search with search criteria of 'Search = T-Shirt.'



The search results are displayed with all the objects in STEP that match the search criteria, in this case 'T-shirt.'

STEP objects in the search result includes:

- Classification / Asset / Product / Entity objects
- Special Types objects
- System Setup Tab objects

Search
✕

Advanced

+
Reset
Search

Displaying 3 of 3 results [Show Details](#)

Name
> 📁 T-shirts ID = 18454
> 📁 T-shirts ID = 18206
> 📁 T-shirts ID = 18202

Search Result Profiling

3 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(2\)](#) - [exclude](#)

- 📁 [Level 3 \(1\)](#) - [exclude](#)
- 📁 [Sales Item Family \(1\)](#) - [exclude](#)

[Classification \(1\)](#) - [exclude](#)

- 📁 [MerchandisingClass \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

- 📁 [T-Shirts Sales Items \(1\)](#) - [exclude](#)
- 📁 [Sportswear \(1\)](#) - [exclude](#)
- 📁 [Upper Body Wear \(1\)](#) - [exclude](#)
- 📁 [T-shirts \(1\)](#) - [exclude](#)

Results by Value

Name matching "t-shirts"

- [Name \(3\)](#) - [exclude](#)

Now, on the search, select the Advanced option 'Match Case on Names and Values.'

With this option selected, the search result will only include attribute values and all the object names in STEP that match the search criteria in the correct case. Since the previous search results were all a different case, this search will return no results.

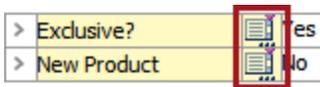
Note: ID searches are always case sensitive.

2. **Include Inherited Values** -When selected, attribute value search results will show objects where the match includes inherited values as well as objects where the match includes locally defined values.

Attribute values with hierarchical inheritance (values with green triangle) will only be included in the search result when Include Inherited Values option is selected.



Dimension dependent Attributes – Specification or Description attribute values inheriting from other contexts (values with a red triangle) will also be displayed in the search result even when the user does not select the option Include Inherited values.



3. **Exclude Values** - When selected, attribute values are not searched for the entered search term. If unchecked, attribute values are searched for the entered term and objects with the search term populated as an attribute value are included in the search results.

The Exclude values in advanced search are useful for neglecting objects which are having search content as a value in it.

For example, assume there are attributes which has value 'Red' in few objects and there are objects which has Object Name/ID as 'Red.'

If a normal search is performed, the results for 'Red' are shown below.

Search

Search
X

Advanced

+
Reset
Search

Displaying 11 of 11 results Show Details

Name
> 18212 L B ID = 18212
> 88723-12 ID = 100914
> A ID = 12345-001
> Cosmic Party Hat - Gold and Red ID = 134422
> Cosmic Party Hat - Green ID = 134414
> Mens T PBO 2 ID = MT18406
> Pink & Blue Giraffe Party Hat ID = 121183
> Red Baseball Cap ID = 20805
> Red Cotton T-Shirts ID = 18205
> Rustic Bed Frame ID = 132499
> T-shirts Items ID = 18203

-Operations on Entire Result-

Search Result Profiling
→

Search Result Profiling

11 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(11\)](#) - [exclude](#)

- [Active Products \(7\)](#) - [exclude](#)
- [Item Family \(2\)](#) - [exclude](#)
- [Sales Item \(1\)](#) - [exclude](#)
- [Item Folder \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

(Displaying the 5 most common)

- [Products \(3\)](#) - [exclude](#)
- [T-shirts Items \(2\)](#) - [exclude](#)
- [Children's Hats \(2\)](#) - [exclude](#)
- [Red Cotton T-Shirts \(2\)](#) - [exclude](#)
- [Hats \(1\)](#) - [exclude](#)

Results by Value

Values matching "Red"

(Values are displayed in lowercase)

[red \(11\)](#) - [exclude](#)

Attributes with values matching "Red"

- [Secondary Color \(7\)](#) - [exclude](#)
- [Color \(2\)](#) - [exclude](#)
- [Available Colors \(1\)](#) - [exclude](#)
- [Attribute B \(1\)](#) - [exclude](#)

If the same search is performed but with 'Exclude Values' selected under Advanced, only attribute IDs and Names matching the search are turned.

Search

Search

Advanced

Match Case on Names and Values

Include Inherited Values

Exclude values

Regular Expression

Include Data Containers

Reset Search

Displaying 2 of 2 results Show Details

Name
> Red ID = 20805
> Red ID = 18205

- Operations on Entire Result

Search Result Profiling

2 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(2\)](#) - [exclude](#)

- [Active Products \(1\)](#) - [exclude](#)
- [Item Family \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent
(Displaying the 5 most common)

- [Products \(2\)](#) - [exclude](#)
- [181167 → Hats and Caps Items \(1\)](#) - [exclude](#)
- [Hats \(1\)](#) - [exclude](#)
- [Hats and Caps Items \(1\)](#) - [exclude](#)
- [T-shirts Items \(1\)](#) - [exclude](#)

Results by Value

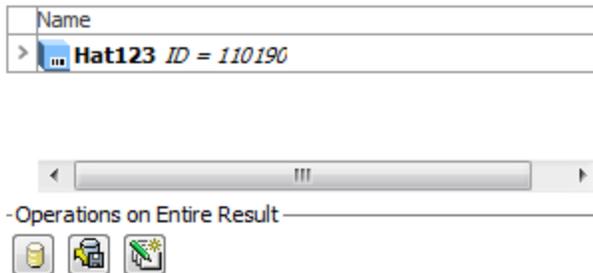
Name matching "Red"

[Name \(2\)](#) - [exclude](#)

- Regular Expression** - When selected, attribute values are searched using the regular expression entered in the Search text box. Although establishing an attribute with Validation Base Type of Regular Expression allows more than 2000 characters (for example, [A-Z]{1,3000}), searching via a Regular Expression only returns results for matches within the first 2000 characters. For more information, see the **Regular Expression** topic in **Resource Materials** online help.
- Include Data Containers** - Include any search terms contained inside data containers.

Search Operations on Entire Result

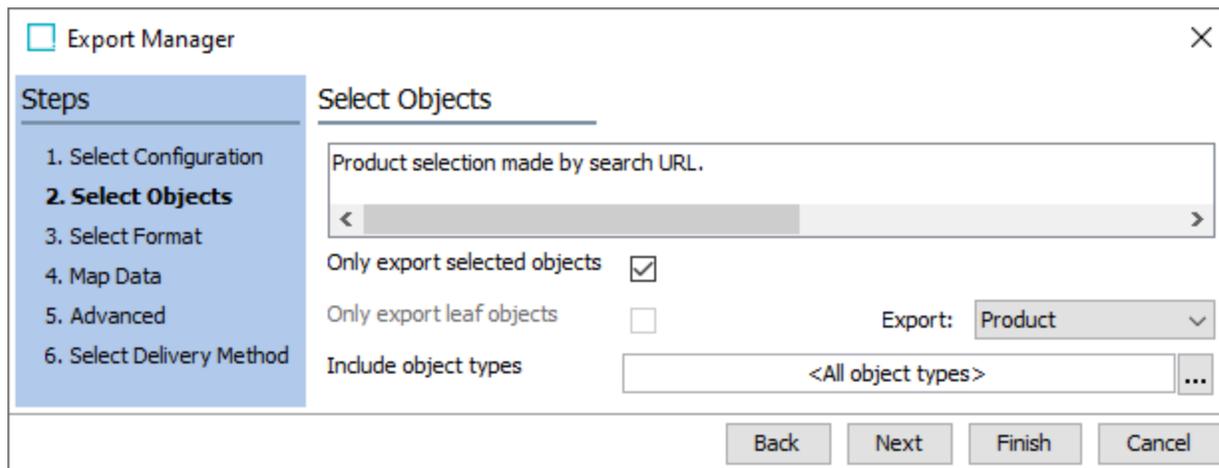
There are three operations that can be found at the bottom of the **Search** Tab.



Exporting a Search Result

After conducting a search it is possible to export the search result by clicking the **Export Search Result** button at the bottom of the **Search** tab.

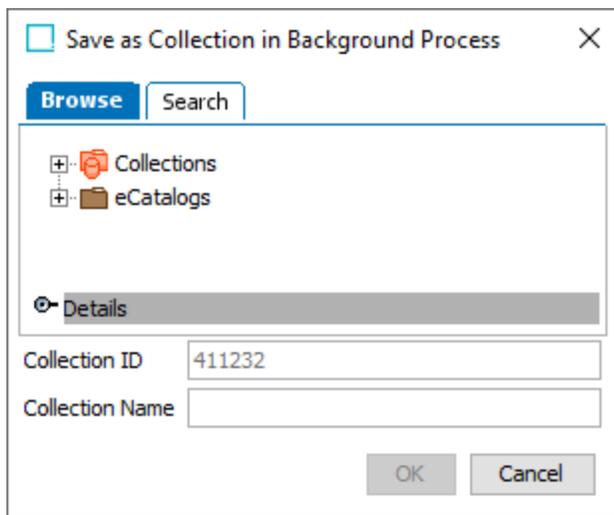
When clicking the **Export Search Result** button, STEP will attempt to use all the objects in the result as root objects for the **Export Manager** (equating selecting the objects on the **Product Selection** step of the **Export Manager**). Which objects are exported is thus determined by the selected **Export** format and the selections made in the **Export Manger**. For more information using the Export Manager, see the **Export Manager** topic in the **Data Exchange** documentation.



Saving a Search Result as a Collection

After conducting a search it is possible to save the entire search result as a **Collection**.

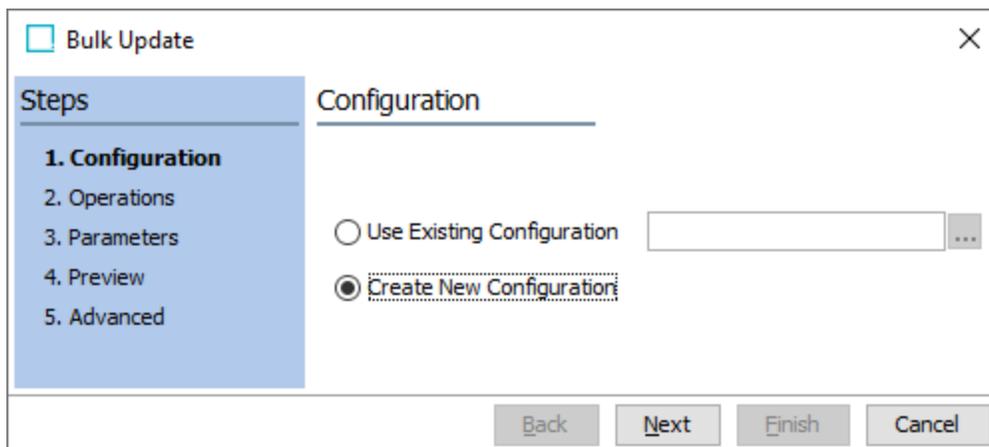
When clicking the **Save as Collection** button, a dialog is opened where it is possible to specify the **ID**, **Name**, and location of the new **Collection**. For more information on collections, see the **Collection** topic in the **Getting Started** documentation.



Bulk Updating a Search Result

When having conducted a search it is possible to **Bulk Update** the entire search result.

When the **Bulk Update Search Result** button is clicked, the **Bulk Update** wizard appears with the search result selected as the dataset. For more information on bulk updates, see the **Bulk Updates** documentation.



Note: If you only wish to **Bulk Update** some of the objects in the result, you can select or multi select in the search result and then select the **Run Bulk Update** option on the **File** menu

Search: Data Containers

The Data Containers search criterion allows users to limit search results to only objects for which data containers exist for the specific data container types, or those objects for which specific attributes are linked via data containers.

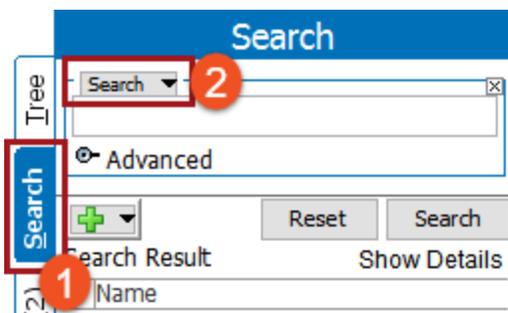
Searching for objects with information in data containers is available using the standard search criterion and also using the specific Data Containers criterion. Each method is defined below.

For more information on data containers and the terminology used in this topic, see the **Data Containers** topic of the **System Setup / Super User Guide** documentation.

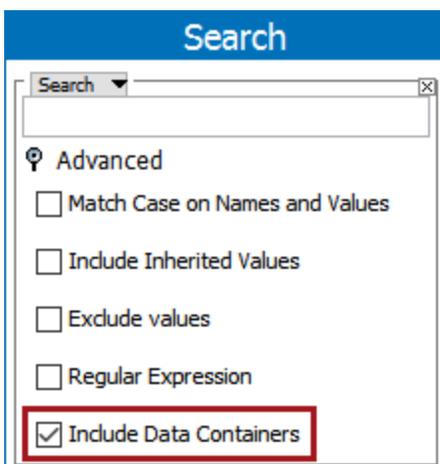
Standard Search Including Data Containers

This option searches data containers and other identified objects for the defined values. For more information, see the **Examples** section below.

1. Click the **Search** tab, and select Search from the dropdown.



2. Open the 'Advanced' flipper and check the 'Include Data Containers' option.

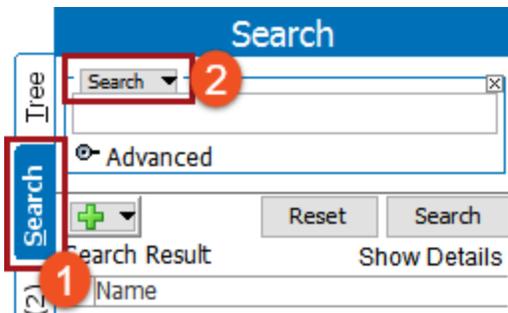


3. If needed, click the green plus button (+) to add additional search criteria.
4. Click on **Search** to run the search and view results.

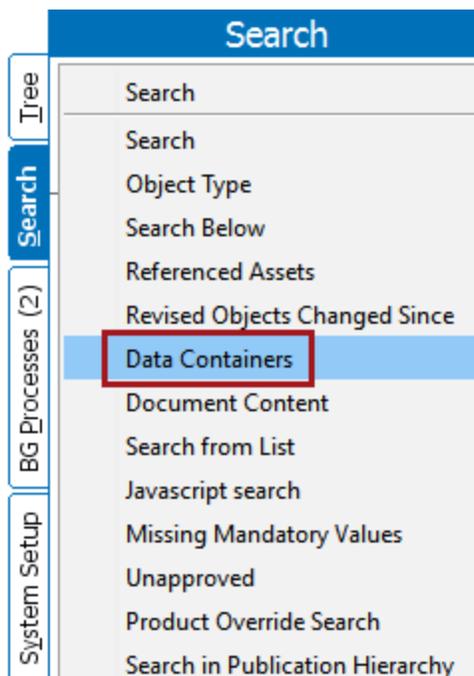
Data Containers Only Search

This method requires that the searched data exist in a data container. Matching data outside of data containers is not displayed. For more information, see the **Examples** section below.

1. Click the **Search** tab, and click the Search dropdown.

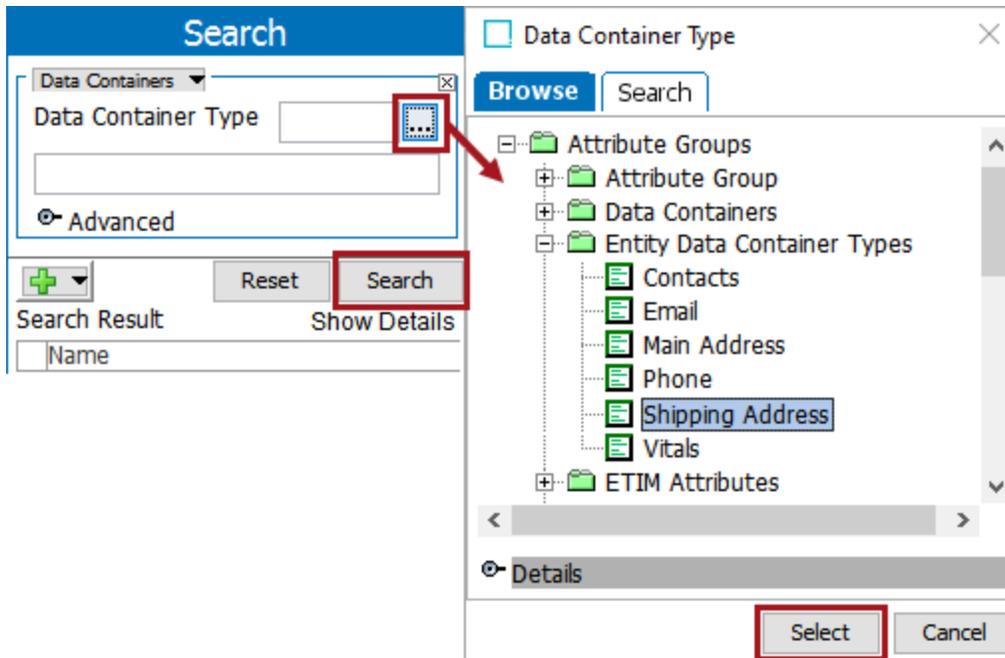


2. In the **Search Criteria Type Selector**, select the 'Data Containers' search criterion.

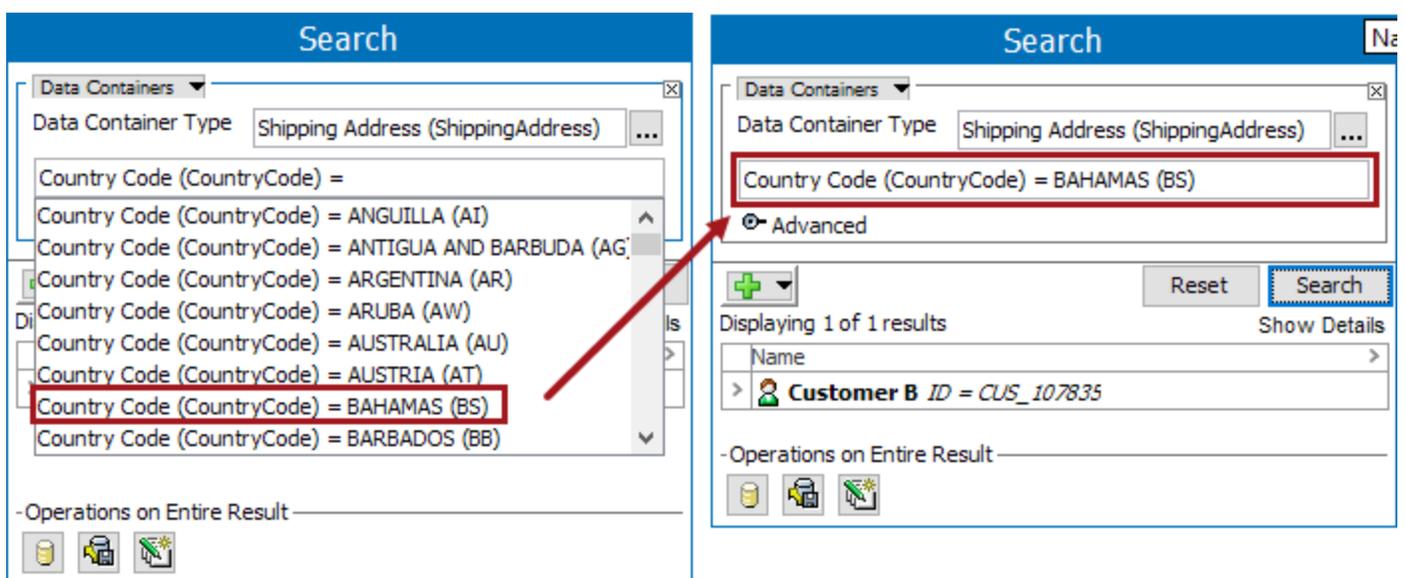


3. Supply the Data Container Type parameter and the additional text input parameter as needed:
 - Continue to the next step without populating either parameter to return all objects for which any data container of any data container type that has been added.

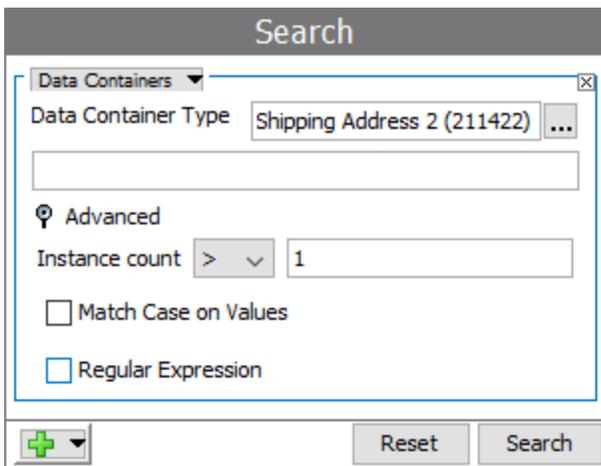
- Click the ellipsis button (...) for the Data Container Type parameter to limit the search results to only those objects for the selected data container type. Click **Select** and then click **Search**. The search returns a list of objects for which the data container type has been added, even when no attribute values exist in the data container. For more information, see the **Examples** section below.



- If necessary, narrow the search using additional search terms in the text input parameter. Type the selected 'Data Container' attribute to display typeahead suggestions. Once selected, the available operators =, <, >, <=, >=, !, !! are displayed. If the selected attribute has a value in the 'Data Container' tab, the values display as a dropdown. However, the search result will be displayed only for the attribute value which is present for the attribute in the Data Container tab. For more information, see the **Examples** section below.



4. If necessary, open the Data Containers Advanced flipper and set the following parameters:



- **Instance count** - specify a number of data container instances an object must have.
 - **Match Case on Values** - makes the search case sensitive.
 - **Regular Expression** - search data containers using a regular expression. For more information, see the **Regular Expression** topic in **Resource Materials** online help.
5. If needed, click the green plus button (+) to add additional search criteria.
6. Click on **Search** to run the search and view results.

Examples

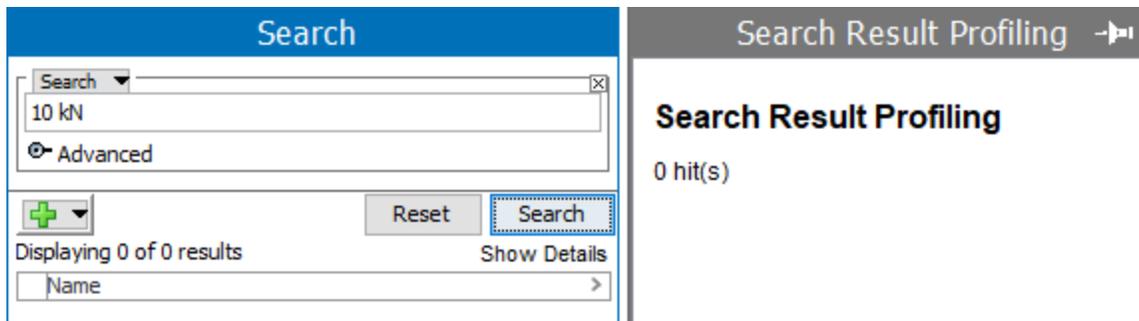
The following examples show a variety of searches for values in data containers.

Standard Search for Product Data Container Value

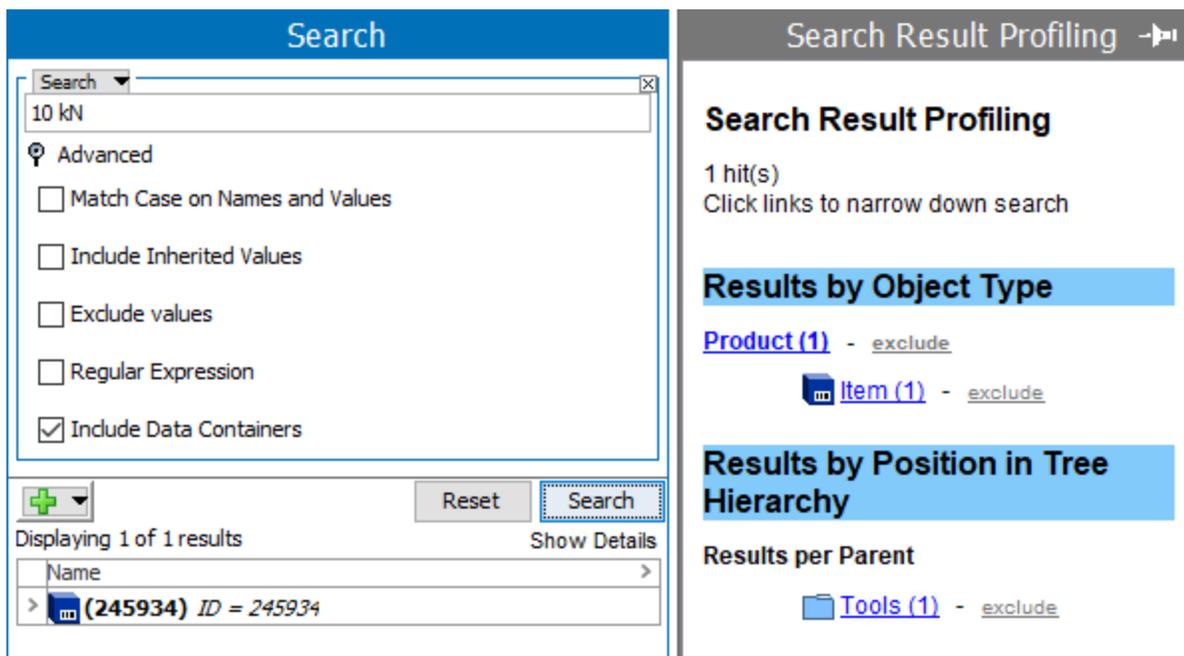
The dataset includes an object with a Flat Crush Test value of '10 kN'. This value is in a product data container.

ID	Attribute Name	Value
IndustryStandardB_271889	Edge Crush	12a 43-47
IndustryStandardB_271889	Flat Crush	12a 10 kN
IndustryStandardB_271889	Pin Adhesion	123 11.05
IndustryStandardB_271889	Scuff and Abrasion	12a 70 N

Searching for the value '10 kN' with the standard Search criterion returns 0 results.

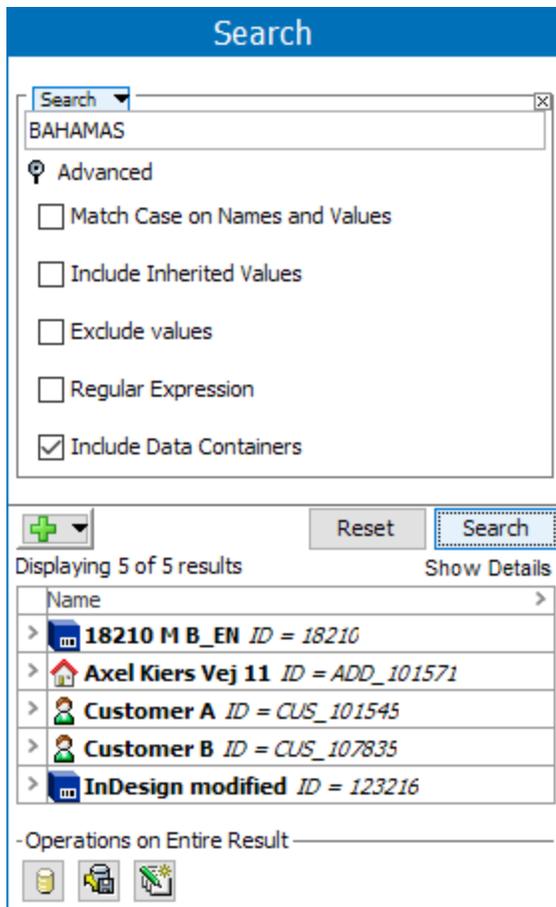


Checking the Advanced option to 'Include Data Containers', and searching again, displays the object as a result.



Standard Search for Entity Data Container Value

In this example, a user searches for all instances of the value 'BAHAMAS' in STEP. Select the standard 'Search' from the dropdown, add 'BAHAMAS' into the text input parameter, open the advanced flipper and check the 'Include Data Containers' option, and click Search. The results includes Customer A and Customer B entity objects where 'BAHAMAS' occurs inside a data container, and also includes the 'BAHAMAS' values that appear outside of data containers.



Data Container search for Entity Data Container Type

In the example below, a user searches for a data container type called 'Shipping Address' without refining the search any further. If the user selects 'Shipping Address' as the Data Container Type and clicks Search, a list of entities for which a data container has been added to an entity under the data container type 'Shipping Address' will display. In this instance, four entities are listed.

Search

Data Containers ✕

Data Container Type ...

Advanced

+ Reset Search

Displaying 4 of 4 results Show Details

Name
> Customer A ID = CUS_101545
> Customer B ID = CUS_107835
> Customer D ID = CUS_114563
> Customer E ID = CUS_114565

The entity with the ID 'CUS_107835' has an attribute 'Country Code' with the value of 'ARGENTIAN' in the Contact tab, but with the value of 'BAHAMAS' on the Data Containers tab.

Tree

- Entity Root (18212)
 - Account Group 1
 - Allen
 - CON_124334
 - Customer Hierarchy
 - Customer A
 - Axel Kiers Vej 11
 - Jesper Jensen
 - Customer B**
 - 3550 George Busbee Pk
 - John Smith
 - Customer C
 - Key Accounts
 - GDSN

Customer B rev.0.4 - Customer

40% complete

References

Referred By

Status

State Log

Tasks

Customer

Data Containers

Description	Name	Value
> ID		CUS_107835
> Name		Customer B
> Object Type		Customer
> Revision		0.4 Last edited by USERJ on Tue Sep 26 17:1...
> Path		Entity hierarchy root/Entity Root/Customer Hi...
> Completeness Score	123	
> Available Sizes		
> Country Code		ARGENTINA

Tree

- Account Group 1
 - Allen
 - CON_124334
 - Customer Hierarchy
 - Customer A
 - Axel Kiers Vej 11
 - Jesper Jensen
 - Customer B**
 - 3550 George Busbe
 - John Smith

Customer B rev.0.4 - Data Containers

40% complete

Referred By

Status

State Log

Tasks

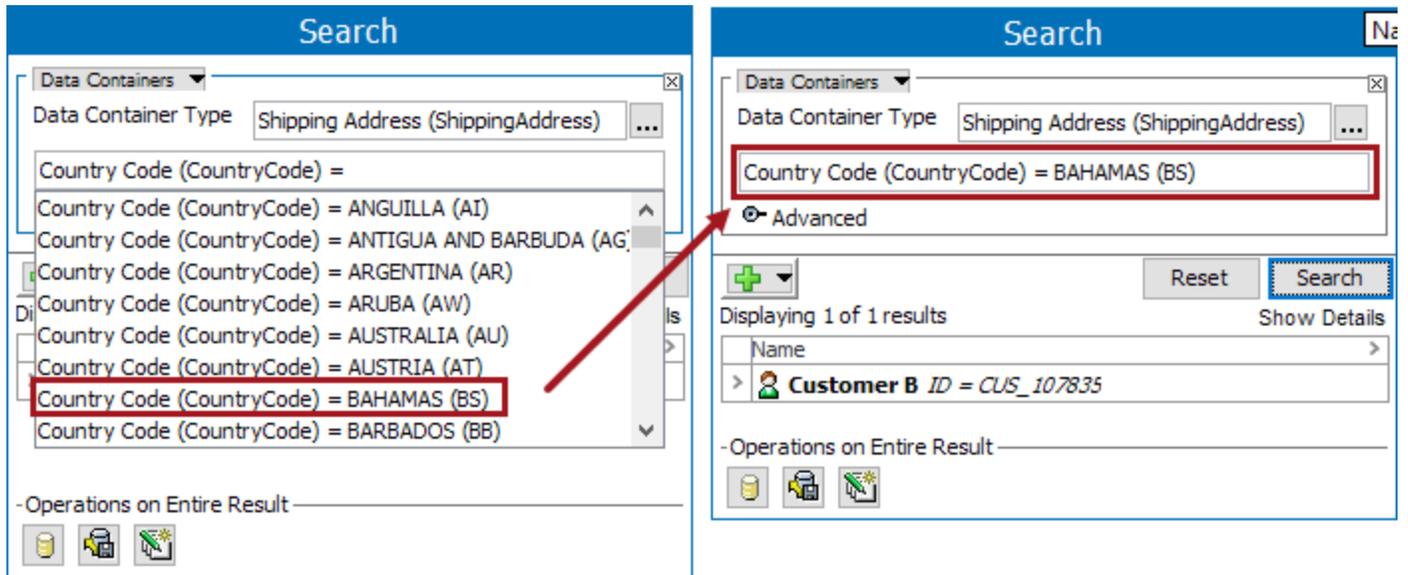
Customer

Data Containers

References

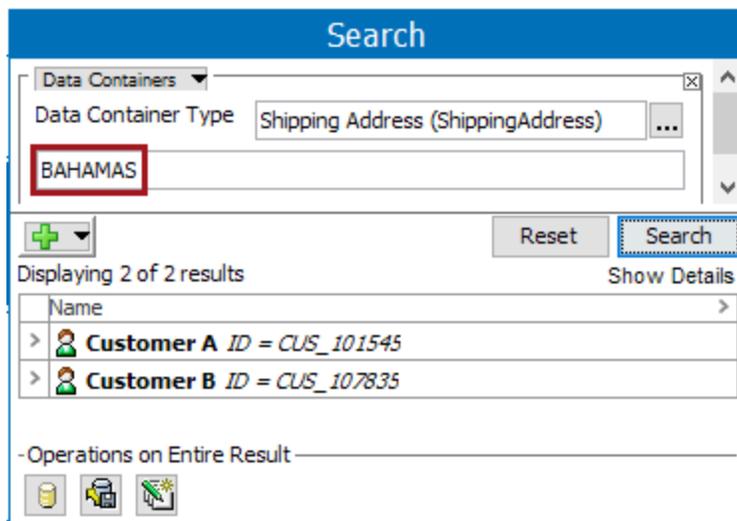
Shipping Address	ID	Attribute Name	Value
		Country Code	BAHAMAS
		Country ISO	
> Address		Country ISO Code	abc
		Latitude	abc

When a search is performed on the 'Shipping Address' data container and the attribute 'Country Code' is selected, all of the values are displayed. The search result will display the entity 'Customer B' only if the value is 'BAHAMAS.' The search result will return '0' if the value selected is 'ARGENTINA'



Data Container search for Entity Data Container Type and Value

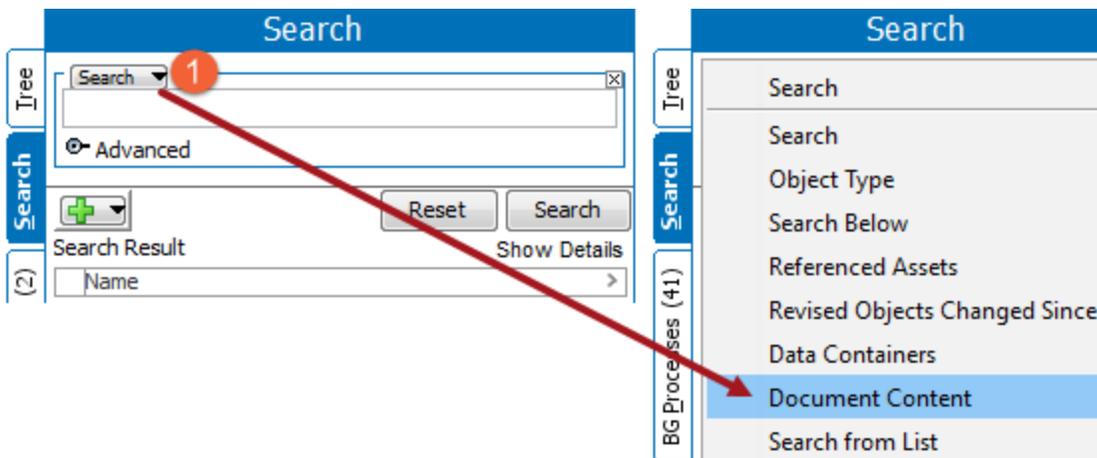
To continue the previous example, if the user refines the search for entities with a 'Country Code' data container type to only include those data containers containing the value 'BAHAMAS', the user would enter 'BAHAMAS' in the input field. In this example, results returned from the search show two of the original four entities. This means that a 'Shipping Address' data container has been added to these two entities, and an attribute within those data containers also contains the value 'BAHAMAS'.



Search: Document Content

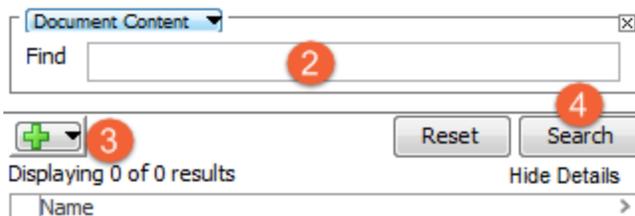
With the **Document Content** search criteria you can search for a specified word / text string in text documents stored as Assets in STEP.

1. Click the **Search** tab.
2. Click the Search dropdown and select **Document Content**.



Important: A prerequisite to searching in documents is that they are indexed. Document Content displays as a search option only in systems that have full text indexable functionality enabled and are not running In-Memory.

3. Enter the word / text string into the text field that appears.



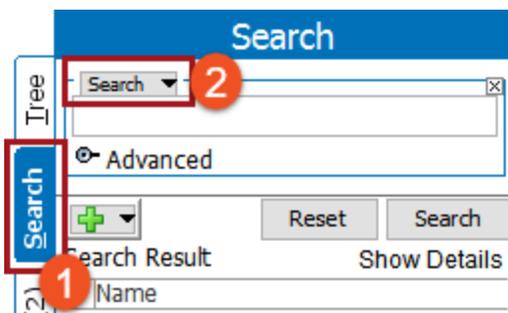
4. Click the green plus sign (+) to add additional search criteria. (Optional)
5. Click on 'Search' to run the search and view results.

Search: JavaScript Search

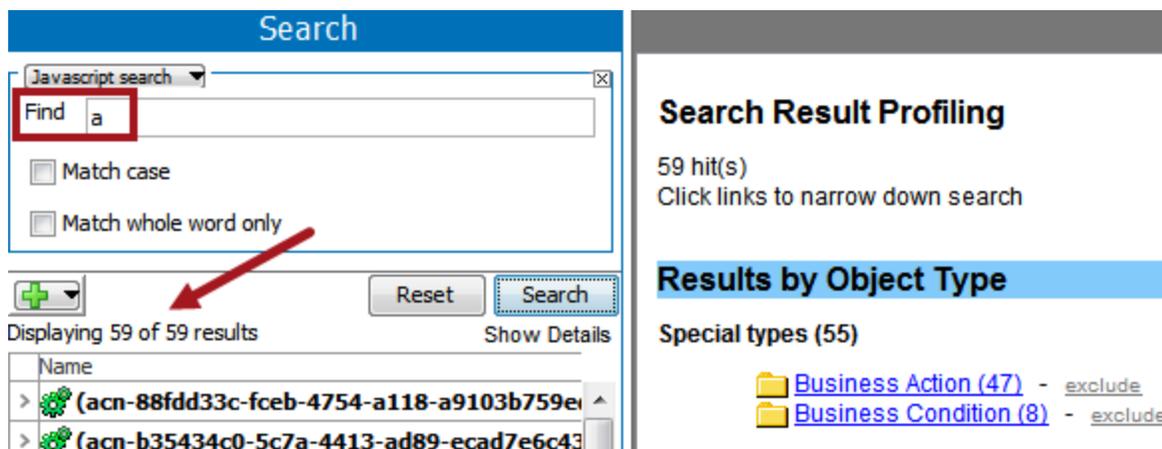
The **JavaScript** search criteria searches through all JavaScript in STEP. It can match items according to Business Rules, Match Algorithms, Decision Tables or any other structure programmed through JavaScript.

Follow the steps below to set up a JavaScript Search:

1. Click the Search tab and click the Search dropdown.



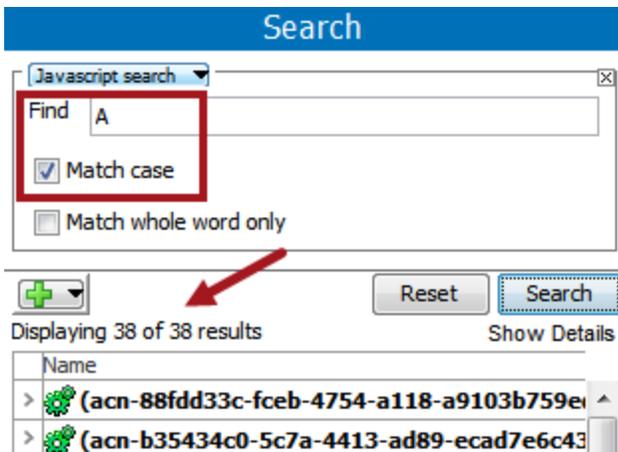
2. Select **JavaScript search**.



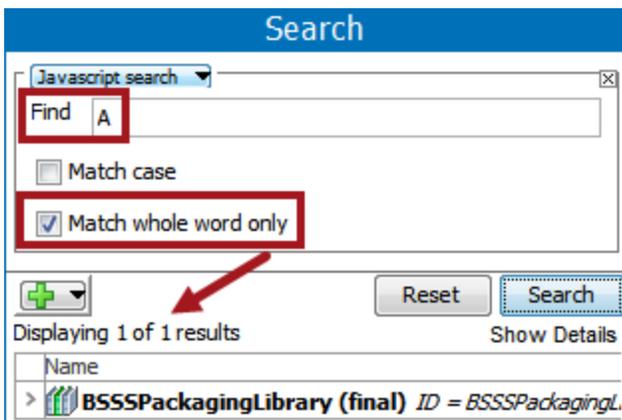
JavaScript Checkbox Options

These checkbox options are available with JavaScript search criteria:

- **Match Case:** If you select this, the search will only return results that match the upper or lower case letters that are in the search criteria.



- **Match whole word only:** will return only results that are the exact criteria that were put in that standalone. An example would be if the letter 'a' were typed into a search, and only results that had 'a' in it that standalone somewhere in the JavaScript were returned.

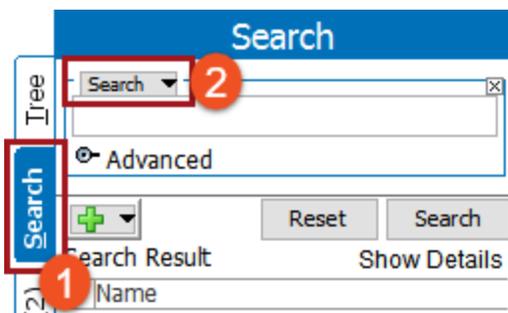


Search: Missing Mandatory Values

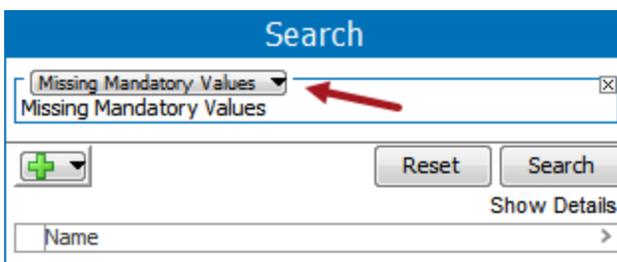
The Missing Mandatory Values search criteria is used for finding Product objects that have valid **Mandatory Specification** attributes without values.

To set a criteria as a **Missing Mandatory Values** search:

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Missing Mandatory Values** from the dropdown.



Use Cases

1. Product object which has specification and description attribute as mandatory with empty values.

The 'Product Name' attribute is set as mandatory for Item Object Types. For Object 22200, the attribute value is left empty. In the Search tab, Missing Mandatory Values search criteria is used with Object Type 'ProductsRoot' search criteria. 22200 is included in the search results.

Search

Products (ProductsRoot)

Missing Mandatory Values

Reset Search

Displaying 100 of 194 results Show Details

Name	ID
> 3 inch heels	20694
> 12-GGK799	100703
> 050-4215I	7825
> 555-22346	6806
> 18213 M O	18213
> 20883	20883
> 20888 AAA Batteries	109003
> 20888 AAA Batteries RECHG	109007
> 21873 (box of 5 pair multi-color)	21873
> 21882 (sellable case of 20 boxes of 5 pair orange)	
> 22126 (box of 20 pair orange)	22126
> 22200	22200
> 22621-12	22621

Product Sub Products References Referenced By

Description

Name	Value
> ID	22200
> Name	22200
> Object Type	Item
> Revision	0.1 Last edited by STEPSYS
> Approved	✗ Never Been Approved
> Translation	Not Translated
> Path	Primary Product Hierarchy/

Manufacturer Information

Name	Value
> Manufacturer's Part Number	IR08X
> Manufacturer Name	abc
> Country of Origin	CHINA
> Product Name	
> Brand	abc
> Supplier Part Number	448291

2. Description attribute is mandatory and is left blank on entity object.

In this example, the 'Available Sizes' description attribute is set to mandatory. On the address entity ADD_107837, the 'Available Sizes' attribute is empty. A search is performed that has a 'Missing Mandatory Values' search criteria with Object Type 'Entity root' search criteria. The ADD_107837 object is returned as a result.

Search

Entity hierarchy root (Entity hierarchy root)

Missing Mandatory Values

Reset Search

Displaying 100 of 10049 results Show Details

Name	ID
> 64TH MED DET (VS)-00000	D&B116543
> 750 South Hampton Dr	ADD_114886
> 3550 George Busbee Pkwy	ADD_107837
> 114880 IIS 2958765415478	115003
> 114883	
> A.B.C. UN	ADD_107837
> A.B.D. EVETTE DC	D&B116564

Address References Referenced By Status State Log Tasks

Description

Name	Value
> ID	ADD_107837
> Name	3550 George Busbee Pkwy
> Object Type	Address
> Revision	0.1 Last edited by USER on Fri Aug 14 16:32:
> Path	Entity hierarchy root/Entity Root/Customer H
> Completeness Score	123
> Available Sizes	
> City	abc Kennesaw
> Contact Name	abc

The search criteria requires no data input or selections to be made. However, it is encouraged to use in conjunction with another search criteria (by clicking the green + sign) to help further refine the search.

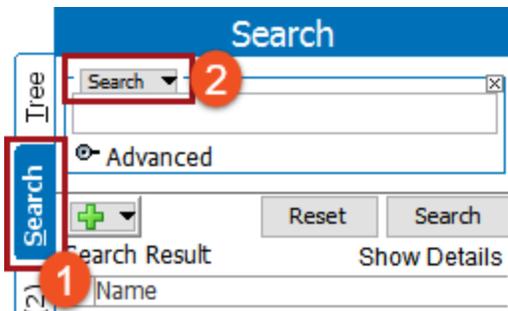
Note: As the **Missing Mandatory Values** search criteria only works on Product objects, using it in combination with other search criteria will limit the search result to such objects.

The Missing Mandatory Values search criteria can also be set to exclude Product objects with missing **Mandatory** values. This functionality is described in **Using Exclude Search Criteria** within the **Search Functionality** topic.

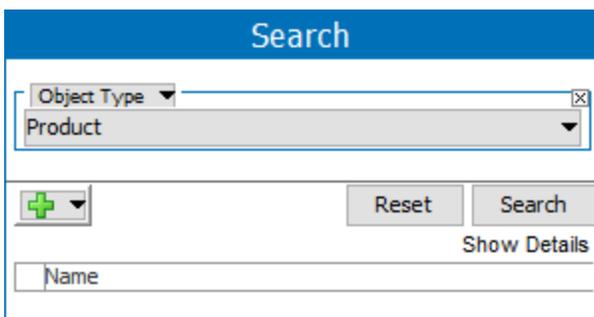
Search: Object Type

With the **Object Type** search criteria you can limit your search result to items of a specific **Object Type**. These objects are maintained in the workbench System Setup > Object Types & Structures folder.

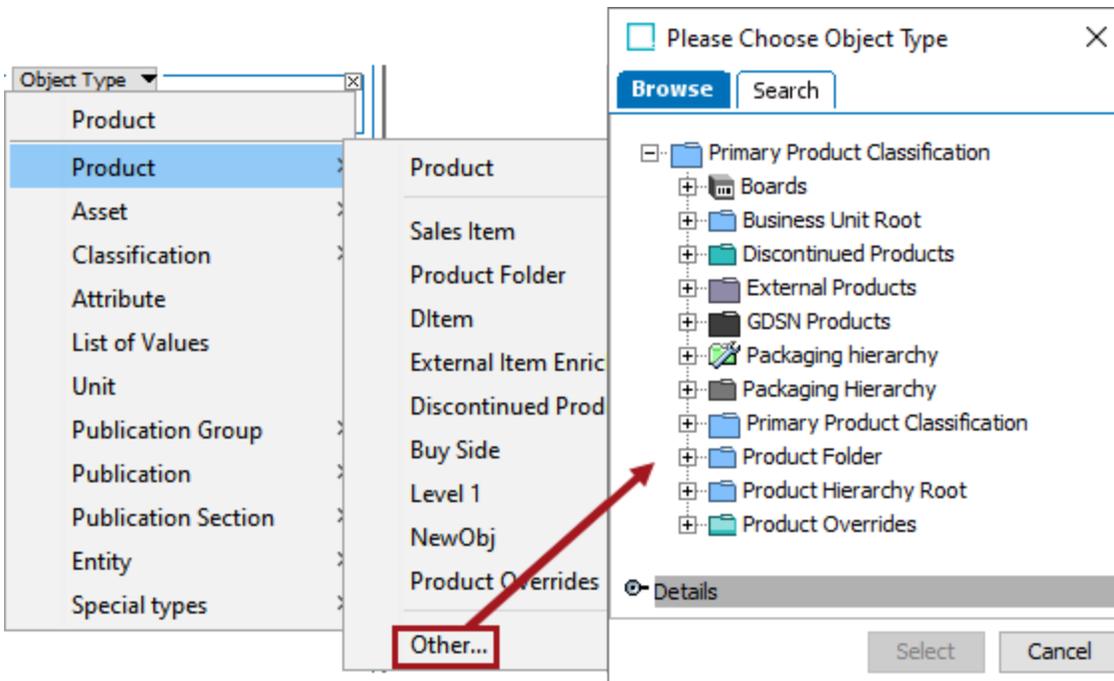
1. Click on the **Search** tab and click the Search dropdown.



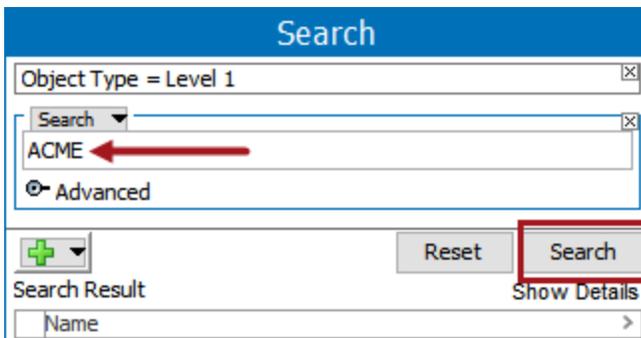
2. Select **Object Type** from the dropdown.



3. In the dropdown that displays 'Product' by default, select an object type. See the **System Setup Object Types** section below for more information.
 - Hover on an object type to display a sub menu when available.
 - When an **Other...** option is available, click it to display a selection dialog. Use the Browse or Search tab to select the object type. Click **Select** to confirm.



- If needed, click the green plus button (+) to add additional search criteria. For example, return only products with the text 'ACME'.



Note: Without the additional search criterion shown above, the results will be a list of all objects of the specified type.

- Click **Search** to run the search and view results.

Search

Object Type = Product ✕

Search ✕

ACME

Advanced

+ Reset Search

Displaying 6 of 6 results Show Details

Name
> 21933 ID = 21933
> 27244 ID = 27244
> Comfy Bed ID = 22155
> Comfy Footboard ID = 22168
> Comfy Headboard ID = 22167
> Comfy Side Rail ID = 22165

Search Result Profiling

6 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(6\)](#) - [exclude](#)

[Item \(6\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

[Beds Items \(4\)](#) - [exclude](#)

[Products \(1\)](#) - [exclude](#)

[Refrigeration Items \(1\)](#) - [exclude](#)

[Products \(1\)](#) - [exclude](#)

[Drinking Items \(1\)](#) - [exclude](#)

Results by Value

Values matching "ACME"
(Values are displayed in lowercase)

[acme \(7\)](#) - [exclude](#)

Attributes with values matching "ACME"

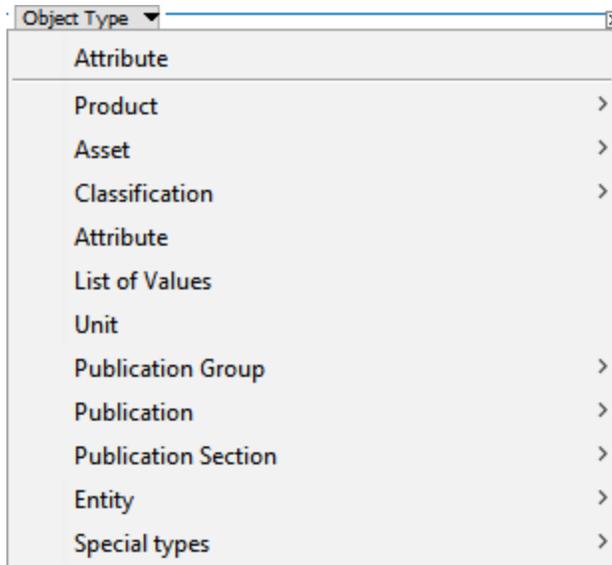
[Brand Name \(5\)](#) - [exclude](#)

[Manufacturer Name \(1\)](#) - [exclude](#)

[Supplier Name \(1\)](#) - [exclude](#)

System Setup Object Types

The following object type selections require further information.



Attributes, Lists of Values, and Units

The Attribute, List of Values, and Unit object type categories do not include sub selections. All of the selected object types available will be searched for each of these categories.

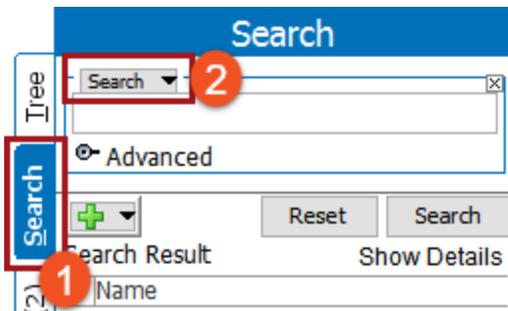
Special Types

Special Types includes Table Type, Business Rule, Business Library, Business Condition, Business Action, and Business Function object types.

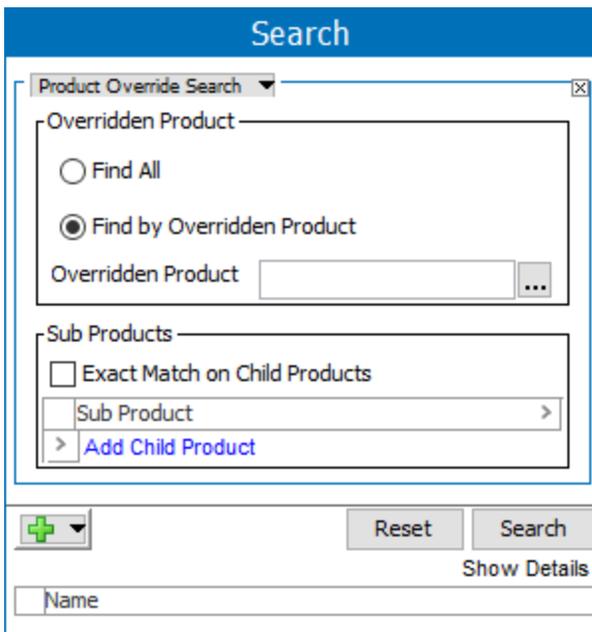
Search: Product Override Search

With the **Product Override** search criteria you can locate and identify any product overrides present in your system. You can search for all overrides in STEP or you can narrow your search to overrides of a specific product. If more concise results are required, you can specify sub-products.

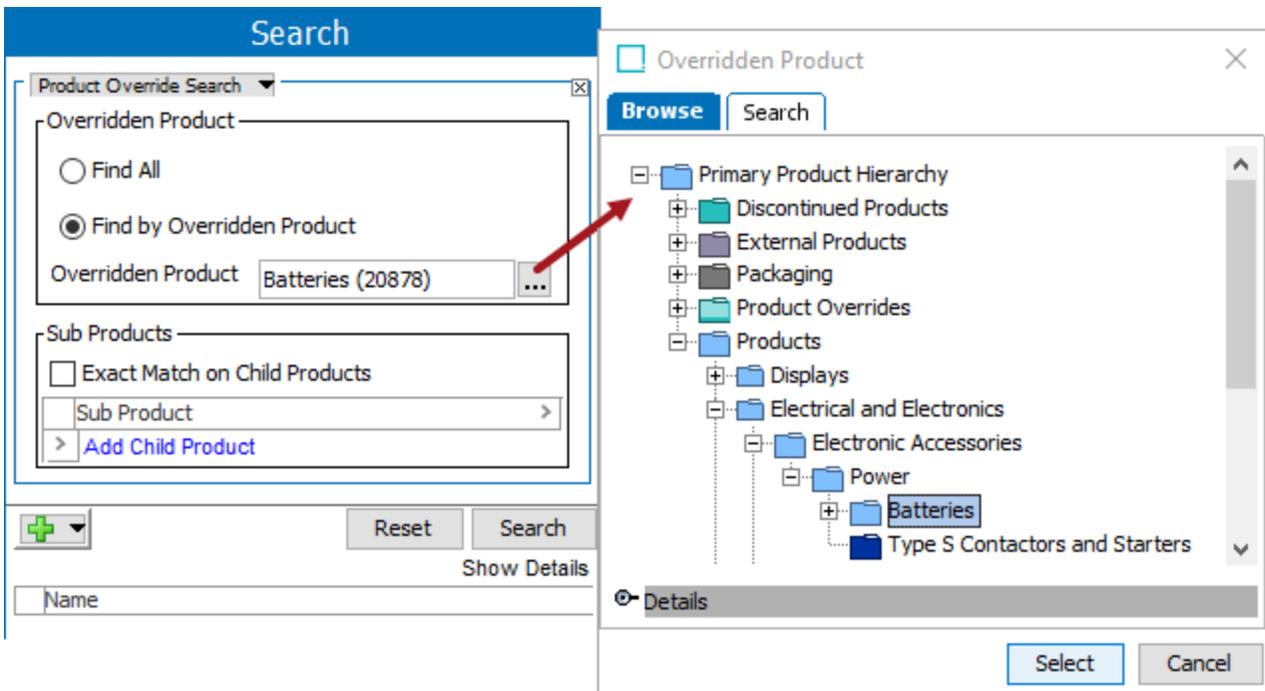
1. Click on the **Search** tab and click the Search dropdown.



2. Select **Product Override Search** from the dropdown.



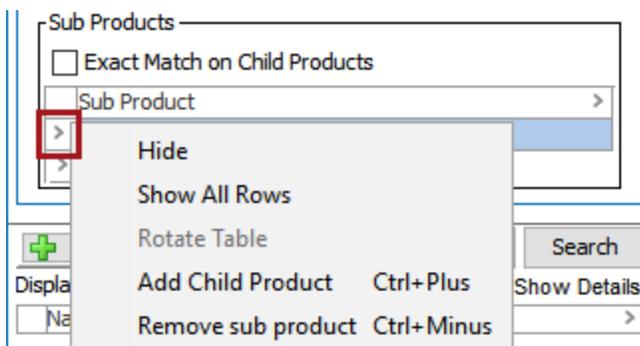
3. In the Overridden Product group, select a radio button :
 - **Find All** - Searches for all product overrides.
 - **Find by Overridden Product** - Searches for the specified product, as shown in this image. In the text box, either type the product's name, or click the ellipsis button (...) to browse or search for a product.



4. In the Sub Products group, set the following options as needed:

- **Exact Match on Child Products** - When checked, search results must have every sub-product specified.
- **Add Child Product** - Click the link to select sub products that will narrow the search further by requiring search results to have exactly the specified sub-products linked to them.

Click the arrow button (>) on one or a group of rows to display the following menu and perform the action:



- **Hide** - Hides an added child product from list.
- **Show All Rows** - Show all hidden child products.
- **Add Child Product** - Does the same operation as the 'Add Child Product' link as stated above.
- **Remove sub product** - Removes the selected child product.

5. If needed, click the green plus button (+) to add additional search criteria.
6. Click on **Search** to run the search and view results.

This image shows products with the specified child product, but others child products could exist as well.

The image consists of two side-by-side screenshots from a software application.

Left Screenshot: Search

- Product Override Search:** A dropdown menu is set to "Product Override Search". Below it, there are two radio buttons: "Find All" (unselected) and "Find by Overridden Product" (selected). An input field labeled "Overridden Product" contains the text "Batteries (20878)".
- Sub Products:** A section with a checkbox "Exact Match on Child Products" (unchecked). Below it is a list of sub-products: "Sub Product", "Batteries Rechargeable ItemFolder", "Batteries Items", and "Add Child Product".
- Buttons:** A green plus button (+) is visible on the left. "Reset" and "Search" buttons are at the bottom right of the search area.
- Results:** Below the search area, it says "Displaying 2 of 2 results" and "Show Details". The results list shows:
 - > Batteries Override 1 → Batteries ID = 124085
 - > Batteries Override 2 → Batteries ID = 179577

Right Screenshot: Search Result Profiling

- Search Result Profiling:** The title of the screen.
- 2 hit(s):** The number of search results.
- Click links to narrow down search:** A prompt to refine the search.
- Results by Object Type:** A section header with a blue background. It lists:
 - [Product \(2\)](#) - exclude
 - [Product-override \(2\)](#) - exclude
- Results by Position in Tree Hierarchy:** A section header with a blue background. It lists:
 - [Level 2 \(2\)](#) - exclude

This image shows there are no overridden products with only this exact sub product.

Search

Product Override Search ✕

Overridden Product

Find All

Find by Overridden Product

Overridden Product ...

Sub Products

Exact Match on Child Products

Sub Product

> Batteries Rechargeable ItemFolder

> [Add Child Product](#)

Reset
Search

Displaying 0 of 0 results Show Details

Name	>

Search Result Profiling

Search Result Profiling

0 hit(s)

This image shows overrides regardless of sub products.

Search

Product Override Search ✕

Overridden Product

Find All

Find by Overridden Product

Overridden Product ...

Sub Products

Exact Match on Child Products

Sub Product

> [Add Child Product](#)

Reset
Search

Displaying 3 of 3 results Show Details

Name	>
> Batteries Override 1 → Batteries ID = 124085	
> Batteries Override 2 → Batteries ID = 179577	
> Batteries Override 3 → Batteries ID = 179584	

Search Result Profiling

Search Result Profiling

3 hit(s)

Click links to narrow down search

Results by Object Type

[Product \(3\)](#) - [exclude](#)

[Product-override \(3\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results per Parent

[Level 2 \(3\)](#) - [exclude](#)

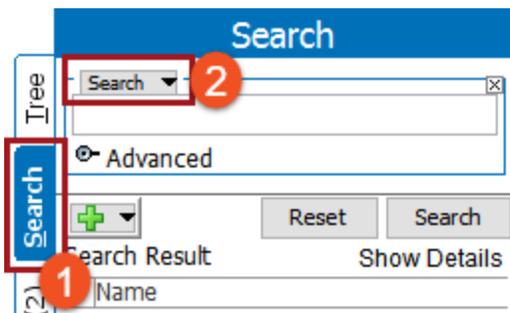
Search: Referenced Assets

The Referenced Assets search criteria is used for finding product objects which has referenced assets to the specified product.

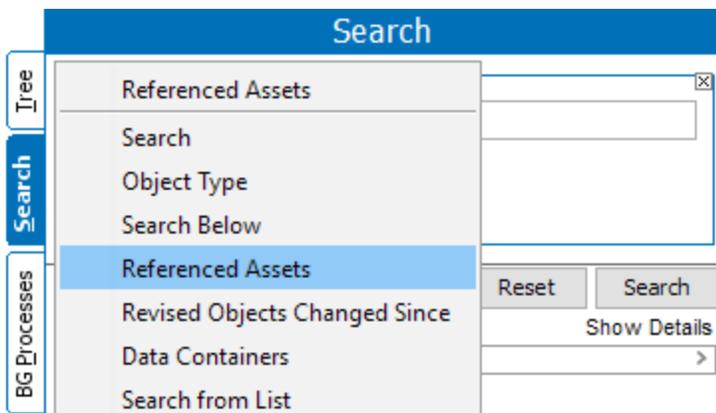
By default, all local referenced assets for the specified product are displayed.

To set up Referenced Assets search criteria:

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Referenced Assets** from the dropdown.



3. Specify a Product Name in the input field by either typing in the actual product name or the product ID. By running a basic search, it will return results of all referenced assets of the product specified.

Search

Referenced Assets ✕

Product Name

Include Inherited Assets

Match Case on Names

+ Reset Search

Displaying 3 of 3 results Show Details

Name
> 20695 back ID = 20700
> 20695 main ID = 20701
> 20695 side ID = 20702

Search Result Profiling

Search Result Profiling

3 hit(s)
Click links to narrow down search

Results by Object Type

[Asset \(3\)](#) - exclude

[Product Image \(3\)](#) - exclude

Results by Position in Tree Hierarchy

Results by Parent

[20 \(3\)](#) - exclude

Note: If the product ID and name are the same, or if the product name has numbers as part of its name, the search result will still display all the local referenced assets of the product specified.

Checkboxes for Referenced Assets Search

When performing a search, there are two search checkbox options that can be selected.

- **Include Inherited Assets** - This option is used when the inherited referenced assets on the specified product are to be included in the search result.

Tree

- [-] Fashion Board
- [-] GDSN Products
- [-] Packaging
- [-] Product Overrides
- [-] Products
 - [-] Apparel
 - [-] Upper Body Wear
 - [-] T-shirts
 - [-] T-shirts Items
 - 235914-1
 - 235915-2
 - 88723-12
 - Cotton T-Shirts
 - So Many T-shirts
 - T-Shirts Sales Items
 - [-] Head Wear
 - [-] Electronics
 - [-] Footwear

235914-1 rev.0.3 - References 100% complete

Category Profile | Proof View | Status | State Log | Tasks

Referenced By | Images & Documents | Commercial | Tables

Product | Product Variants | Sub Products | **References**

- [-] Category Specific Attributes
- [-] Discontinued Product Maintenance
- [-] Document References
- [-] Image References

Reference Type	Target	Thumbnail	ImagePrior
> Brand Name Logo			
> Illustration			
> Primary Product Image	Blue cap		
> Product Images			
> Video			

- **Match Case on Names** - This ensures that the specified product name is searched matching the case (case sensitive) and all local referenced assets are displayed in the search result.

The screenshot displays the STIBO SYSTEMS interface with three main panels:

- Tree Panel:** A hierarchical tree view showing product categories. The path is: Products > Apparel > Upper Body Wear > T-shirts > T-shirts Items. Under 'T-shirts Items', three items are listed: 235914-1, 235915-2, and 88723-12.
- Search Panel:** A search configuration window titled 'Search'. It includes:
 - A dropdown menu for 'Referenced Assets'.
 - A text input field for 'Product Name' containing 'T-shirts Items'.
 - A checkbox for 'Include Inherited Assets' (unchecked).
 - A checked checkbox for 'Match Case on Names'.
 - Buttons for '+', 'Reset', and 'Search'.
 - Status: 'Displaying 1 of 1 results' and a 'Show Details' link.
 - A table with one row:

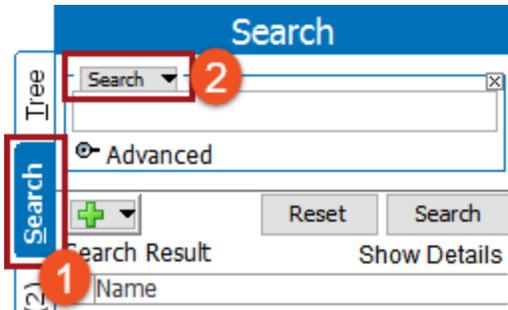
Name
> Blue cap ID = 107625
 - Navigation arrows and a section for '-Operations on Entire Result' with icons for delete, print, and refresh.
- Search Result Profiling Panel:** A panel titled 'Search Result Profiling' showing:
 - '1 hit(s)' and a link to 'Click links to narrow down search'.
 - A section 'Results by Object Type' with a link: [Asset \(1\) - exclude](#) and a sub-link: [Product Image \(1\) - exclude](#).
 - A section 'Results by Position in Tree Hierarchy' with a sub-section 'Results by Parent' and a link: [1 \(1\) - exclude](#).

Search: References and Referenced By

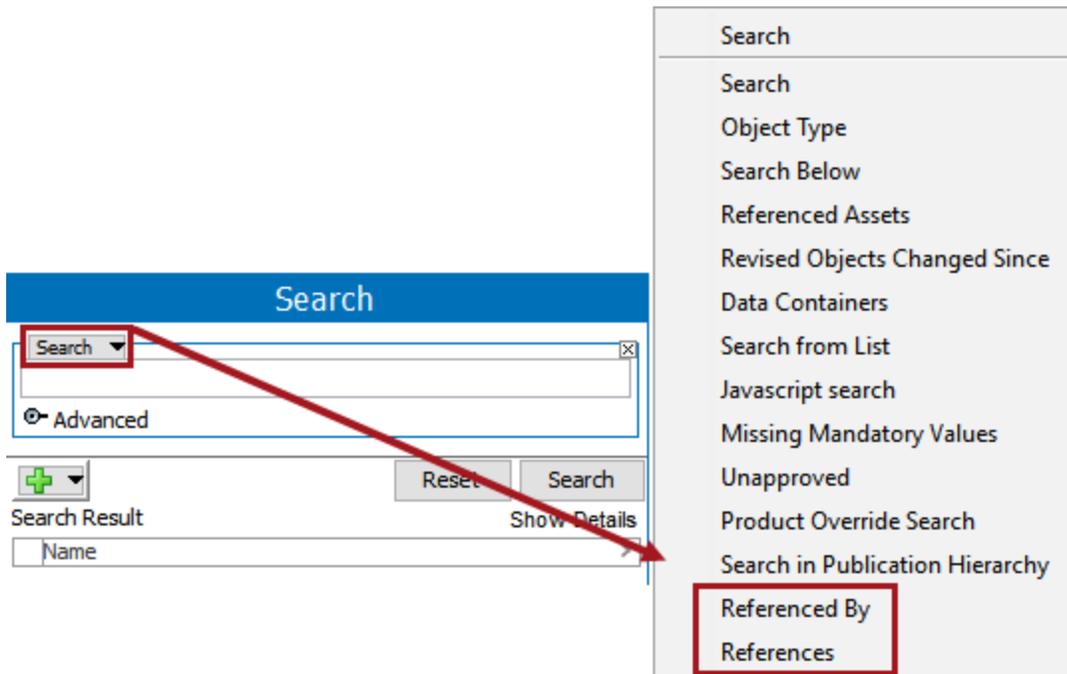
The **References** and **Referenced By** criteria work similarly.

To navigate to either of these searches:

1. Click on the **Search** tab and click the Search dropdown.



2. Select **References** or **Referenced By** from the dropdown.



Both options require a reference type selection to begin. Reference types are setup in STEP Workbench System Setup tab in the Reference Types folder, and the Web UI Advanced Search allows you to pick from image and document reference types, classification reference types, and product reference types.

Once a reference type is entered, no additional options need to be filled in to start a search. Use the information at a high level or fill in the other values to drill down further (e.g., multi-supplier item references). Select a reference source under **Referenced By** and a target under the **References**. Plus enter specific attributes and values to search reference metadata.

References

For References, there are three boxes that can be checked: **Include Inherited References**, **Include Data Container References**, and **Finding Missing References**.

Include Inherited References: When this is selected, it will show items that have the particular search criteria passed down to them from a parent folder or level.

The screenshot displays the 'Search' interface with the following components:

- Search Panel (Left):**
 - Reference Type: Owners Manual (OwnersManual)
 - Include Inherited References (highlighted with a red box)
 - Find Missing References
 - Reference Target: Search (with an Advanced search option)
 - Buttons: Reset, Search
 - Displaying 4 of 4 results
 - Table of results:

Name
> 20-68204 ID = 20682
> 555-22346 ID = 6806
> SKU 00001 ID = SKU 00001
> SKU 00011 ID = SKU 00011
- Search Result Profiling (Right):**
 - 4 hit(s)
 - Click links to narrow down search
 - Results by Object Type:**
 - Product (4) - exclude
 - Product (2) - exclude
 - Item (2) - exclude
 - Results by Position in Tree Hierarchy:**
 - Tire Care Items (2) - exclude
 - Ski Jacket Light (1) - exclude
 - 104061 → Ski Jacket Xtreme (1) - exclude
 - Products (1) - exclude
 - Ski Jacket Xtreme (1) - exclude

Include Data Container References: When this is selected, references that appear on data containers may appear in the search results.

Search

References ▾

Reference Type ...

Include Inherited References

Include Data Container References

Find Missing References

Reference Target

Search ▾

⊖ Advanced

+

Reference Metadata

+

+
Reset
Search

Displaying 1 of 1 results Show Details

Name
> Bilka Tilst ID = 137800

Search Result Profiling

Search Result Profiling

1 hit(s)
Click links to narrow down search

Results by Object Type

[Entity \(1\)](#) - [exclude](#)

[Organization Customer \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results per Parent

[Organisation Customers \(1\)](#) - [exclude](#)

Finding Missing References: When the reference type is selected, and this box is checked, the populated results will show all items that have that particular missing reference.

Search

References ✕

Reference Type ⋮

Include Inherited References

Find Missing References

Reference Target +

Reference Metadata +

+
Reset
Search

Displaying 98 of 98 results Show Details

Name
> 20-68204 ID = 20682
> 050-4215I ID = 7825
> 555-22346 ID = 6806
> 6642 ID = 6642
> 7130-03 ID = 6854
> 7133-12 ID = 8081

Search Result Profiling

98 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(98\)](#) - exclude

- [Item \(46\)](#) - exclude
- [SalesItem \(43\)](#) - exclude
- [SalesItemFamily \(5\)](#) - exclude
- [ItemFamily \(4\)](#) - exclude

Results by Position in Tree Hierarchy

Results by Parent

(Displaying the 5 most common)

- [Products \(21\)](#) - exclude
- [Products \(8\)](#) - exclude
- [Hats and Caps SalesItems \(7\)](#) - exclude
- [Drinking Items \(5\)](#) - exclude
- [Hanes T-shirts \(5\)](#) - exclude

Reference Target

The user has to type the ID/Name of the target in the 'Reference Target' field and click on the 'Search' button. This will display all the Source / Products which uses the Target reference specified in the 'Reference Target' search field.

In this example, the 'Reference Type' field is empty. Hence the result is irrespective of the reference type.

Search

References ▾

Reference Type ⋮

Include Inherited References
 Find Missing References

Reference Target

Search ▾

image/jpeg
 Advanced

+

Reference Metadata

+

Reset
Search

Name	Show Details
> 8225 ID = 8225	
> 123857 G ID = 123857	
> 0726222 ID = 111204	
> Acme Automatic Drip Coffee Maker ID = 22196	

Search Result Profiling

18 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(17\)](#) - [exclude](#)

- [Item Family \(9\)](#) - [exclude](#)
- [Item \(6\)](#) - [exclude](#)
- [Sales Item \(1\)](#) - [exclude](#)
- [Sales Item Family \(1\)](#) - [exclude](#)

[Entity \(1\)](#) - [exclude](#)

- [Customer \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

(Displaying the 5 most common)

- [Pull-Down/Pull-Out Kitchen Faucets \(8\)](#) - [exclude](#)
- [Products \(4\)](#) - [exclude](#)
- [Tire Accessories \(1\)](#) - [exclude](#)
- [T-Shirts Family \(1\)](#) - [exclude](#)
- [Tire Care SalesItems \(1\)](#) - [exclude](#)

The search result will differ when we specify the 'Reference Type'.

In this example, the 'Reference Type' is selected and shows all the results for that 'Reference Target.'

Search

References
✕

Reference Type Product Images (ProductImage) ...

Include Inherited References

Find Missing References

Reference Target

Search
✕

image/jpeg

Advanced

+

Reference Metadata

Reset Search

Displaying 7 of 7 results
Show Details

Name
> 123857 G ID = 123857
> 0726222 ID = 111204
> Acme Automatic Drip Coffee Maker ID = 22196
> Cotton T-shirts ID = 18209
> Dog Party Hats Assortment ID = 115306
> Dog Party Hats Assortment ID = 121190
> Yellow & Pink Party Hat ID = 121175

Search Result Profiling

7 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(7\)](#) - [exclude](#)

[Item \(6\)](#) - [exclude](#)

[Item Family \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

(Displaying the 5 most common)

[Products \(4\)](#) - [exclude](#)

[Flashlights Item Override → Flashlights Items \(1\)](#) - [exclude](#)

[Dress Shoes \(1\)](#) - [exclude](#)

[T-Shirts Family \(1\)](#) - [exclude](#)

[Party Hats \(1\)](#) - [exclude](#)

If a narrowed search is needed, use the advanced option. To use this option click the 'Advanced' flipper and select the appropriate option. For more details on the advanced options, see the **Search: Advanced Options** topic.

Search
✕

image/jpeg

Advanced

Match Case on Names and Values

Include Inherited Values

Exclude values

Regular Expression

Include Data Containers

Referenced By

Reference Source

The user has to type the ID / Name of the source wish to search. It will list the items which have been used as a source.

The screenshot displays the 'Search' interface with the following components:

- Search Filters:**
 - Referenced By:** A dropdown menu.
 - Reference Type:** A text input field with an ellipsis button (...).
 - Reference Source:** A text input field with an ellipsis button (...).
 - Search Below:** A dropdown menu.
 - Primary Product Hierarchy (Product hierarchy root):** A text input field with an ellipsis button (...).
 - Reference Metadata:** A text input field with a plus button (+).
- Search Controls:** A plus button (+), a 'Reset' button, and a 'Search' button.
- Results Summary:** 'Displaying 100 of 615 results' and a 'Show Details' link.
- Search Results Table:**

Name
> 120-Volt Tire Inflators (case of 10) ID = 6812
> 120-Volt Tire Inflators (case of 4) ID = 6813
> 120-Volt Tire Inflators (pack of 2) ID = 18619
> 555-2033_M ID = 8801
> 7130-03-FR ID = 6854
- Search Result Profile:**
 - 615 hit(s)
 - Click links to narrow down
 - Notice: Profile is not filtered
- Results by Object Type:**
 - Product (456)** - exclude
 - External Item
 - External Item
 - Active Product
 - Sales Item
 - Case (20)
 - Pack (5) -
 - Item Family
 - Open Item
 - Pallet (2) -
 - Level 3 (1)
 - Sales Item
 - External Item
 - Sales Item
 - Asset (120)** - exclude

Click the ellipsis button (...) to browse for a reference type for search either type in the reference type ID / Name for more restricted search.

Search

Referenced By
✕

Reference Type ...

Reference Source

Search Below
✕

 ...

+

Reference Metadata

+

+

Reset
Search

Displaying 53 of 53 results Show Details

	Name
>	1st Birthday_Category Image ID = 187824
>	1st Birthday Boy Blue Cupcake Kit ID = 187820
>	1st Birthday Boy Cupcake Kit ID = 187815

<

Search Result Profiling

53 hit(s)
Click links to narrow down search

Results by Object Type

[Asset \(53\)](#) - [exclude](#)

[Product Image \(53\)](#) - [ex](#)

Results by Position in Tree

Results by Parent

(Displaying the 5 most common)

- [1S \(14\)](#) - [exclude](#)
- [AC \(8\)](#) - [exclude](#)
- [Assets \(4\)](#) - [exclude](#)
- [DI \(4\)](#) - [exclude](#)
- [12 \(3\)](#) - [exclude](#)

If the user needs a narrowed search, then the user can also use the advanced option. To use this option, open the Advanced flipper and select the appropriate. For more details on the advanced options, see the **Search: Advanced Options** topic.

Referenced By
✕

Reference Type ...

Reference Source

Search
✕

Advanced

Match Case on Names and Values

Include Inherited Values

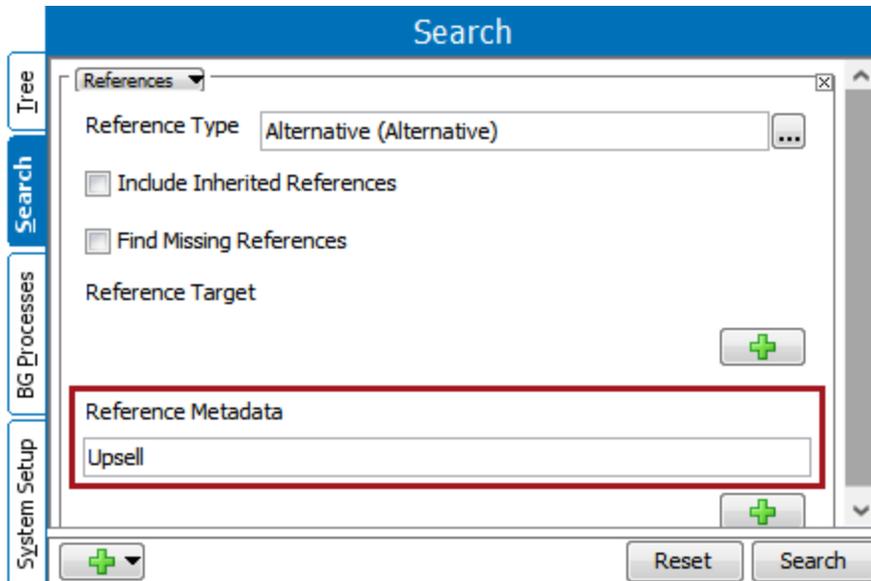
Exclude values

Regular Expression

Include Data Containers

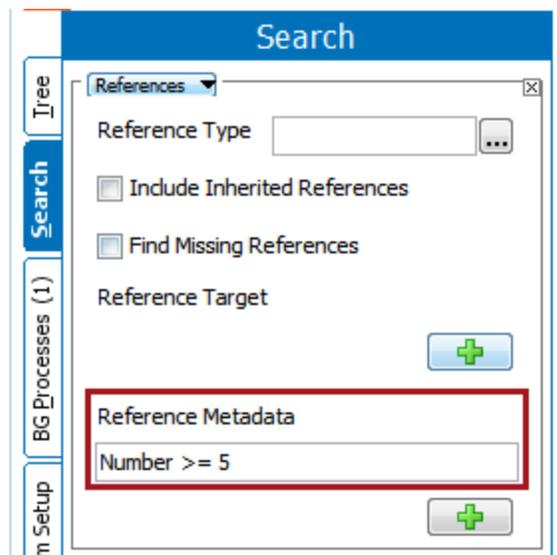
References and Referenced By Metadata Attribute Value Searches

Values for metadata attributes may be searched by using the **References** or **Referenced By** search options. Users may indicate any value to search *all* metadata attributes for a matching value. The following pictures will demonstrate with **References**, but know that the same holds true for **Referenced By**.



The screenshot shows the 'Search' dialog box with the 'References' tab selected. The 'Reference Type' is set to 'Alternative (Alternative)'. There are two unchecked checkboxes: 'Include Inherited References' and 'Find Missing References'. The 'Reference Target' field is empty. Below it, the 'Reference Metadata' field contains the text 'Upsell' and is highlighted with a red border. There are three green plus buttons for adding items. At the bottom, there are 'Reset' and 'Search' buttons.

Alternatively, users may enter an attribute *ID* or *name*, operator, and value for a more restricted search.



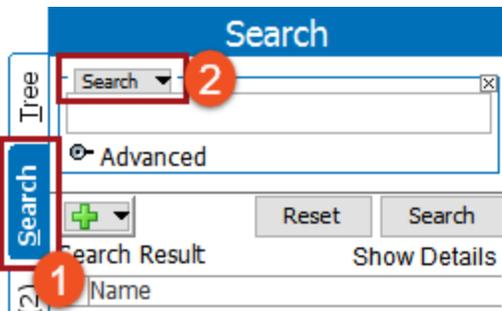
The screenshot shows the 'Search' dialog box with the 'References' tab selected. The 'Reference Type' field is empty. There are two unchecked checkboxes: 'Include Inherited References' and 'Find Missing References'. The 'Reference Target' field is empty. Below it, the 'Reference Metadata' field contains the text 'Number >= 5' and is highlighted with a red border. There are three green plus buttons for adding items. At the bottom, there are 'Reset' and 'Search' buttons.

Note: It is not possible to perform searches on missing metadata values.

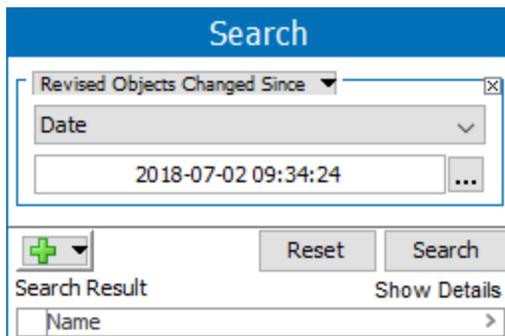
Search: Revised Objects Changed Since

With the **Revised Objects Changed Since** search criteria you can find recently edited objects in the workbench. To narrow your search, enter an exact date / time to determine how old the changes can be, or you use intervals of days, hours, or minutes. Revised Objects Changed Since criteria can be combined with any other search criteria.

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Revised Objects Changed Since** from the dropdown.

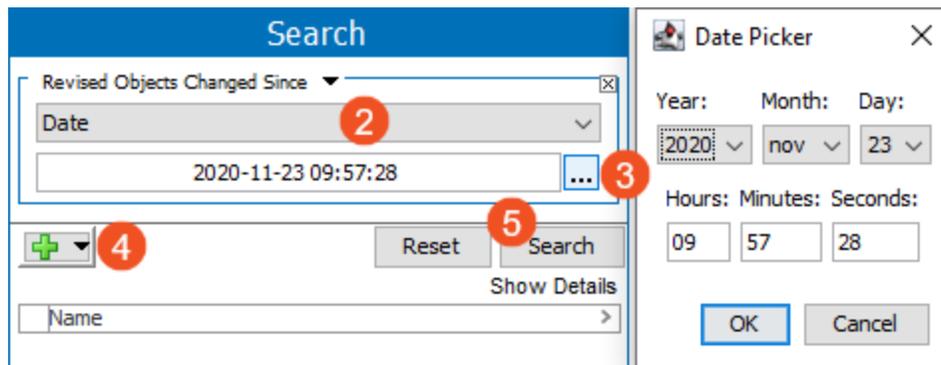


3. A dropdown appears with the following options:

- Date
- Interval of Days
- Interval of Hours
- Intervals of Minutes

Note: Only number values are accepted as input for the options **Interval in days**, **Interval in hours**, **Interval in minutes**. When Days/day, hour/Hours/H, or minutes/Min/M is suffixed along with number, the number value is considered.

For the purpose of this example, 'Date' will be used for the 'Revised Objects Changed Since' search field. The **Date** option will provide a data picker, allowing for the selection of the date and time.



4. Click the ellipsis button (...) and determine the date / time of the oldest objects you wish to search. Click **OK**.
5. If necessary, click the green plus button (+) to define additional search criteria.
6. Click on **Search** to run the search and view results.

Search Result Profiling

8 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(4\)](#) - [exclude](#)

- [Product \(2\)](#) - [exclude](#)
- [Item \(1\)](#) - [exclude](#)
- [Case \(1\)](#) - [exclude](#)

[Asset \(3\)](#) - [exclude](#)

- [Owners Manual \(2\)](#) - [exclude](#)
- [Assets \(1\)](#) - [exclude](#)

Special types (1)

- [Portal Configuration Type \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent
(Displaying the 5 most common)

- [MA \(3\)](#) - [exclude](#)
- [Products \(1\)](#) - [exclude](#)
- [Ski Jacket Pro \(1\)](#) - [exclude](#)
- [Ski Jacket Light \(1\)](#) - [exclude](#)
- [Buy Side Packaging \(1\)](#) - [exclude](#)

- **Interval in days** – Specify the number value in the field.

The search result is displayed as shown below with objects which are revised since last 3 days.

Search

Revised Objects Changed Since
Interval in days
3
Search: ACME

Reset Search

Displaying 13 of 13 results Show Details

Name
21933 ID = 21933
Black Lamp ID = 122907
Black Lamp ID = 208653
Black Lamp by Mell ID = 122906
Black Lamp with dimmer by Mell ID = 122912
Blue Lamp by Mell ID = 122915
Comfy Bed ID = 22155
Comfy Footboard ID = 22166
Comfy Headboard ID = 22167
Comfy Side Rail ID = 22165
Purple Lamp by Mell ID = 122913
Red Baseball Cap ID = 20803
Yellow Lamp by Mell ID = 122914

Search Result Profiling

13 hit(s)
Click links to narrow down search

Results by Object Type

Product (13) - [exclude](#)

Item (12) - [exclude](#)

Sales Item (1) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent
(Displaying the 5 most common)

Desk Lamp Items (7) - [exclude](#)

Beds Items (4) - [exclude](#)

SASProducts (1) - [exclude](#)

Acme Baseball Cap (1) - [exclude](#)

arcimento (1) - [exclude](#)

Results by Value

Values matching "ACME"
(Values are displayed in lowercase)

acme (14) - [exclude](#)

Attributes with values matching "ACME"

Manufacturer Name (7) - [exclude](#)

Brand Name (6) - [exclude](#)

- **Interval in hours** –Specify the number value in the field.

Revised Objects Changed Since ✕

Interval in hours ▼

60

The search result is displayed as shown below with objects which are revised since last 60 hours.

Search

Revised Objects Changed Since ✕

Interval in hours ▼

60

Search: ACME ✕

+ Reset Search

Displaying 4 of 4 results Show Details

Name
>  Black Lamp ID = 208653
>  Comfy Bed ID = 22155
>  Purple Lamp by Mell ID = 122913
>  Yellow Lamp by Mell ID = 122914

Search Result Profiling

4 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(4\)](#) - [exclude](#)

 [Item \(4\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

 [Desk Lamp Items \(3\)](#) - [exclude](#)

 [Beds Items \(1\)](#) - [exclude](#)

 [SASProducts \(1\)](#) - [exclude](#)

- **Interval in minutes** – Specify the number value in the field.

Revised Objects Changed Since ✕

Interval in minutes ▼

30

The search result is displayed as shown below with objects which are revised since last 30 minutes.

Search

Revised Objects Changed Since

Interval in minutes

Displaying 3 of 3 results Show Details

Name
> Asset Push 1 Queue ID = <i>AssetPush1</i>
> DTP Queue ID = <i>DTPConfiguration</i>
> NSLJAssetpush ID = <i>NSLJAssetpush</i>

Search Result Profiling

3 hit(s)
Click links to narrow down search

Results by Object Type

Special types (3)

- [Asset Push Event Queue \(3\)](#) - [exclude](#)

Search: Sample Result

The Sample Result Search Criterion allows users to refine the search results to only those specified numbers. When the 'Sample Result' criterion is selected, one input field 'Sample Result Size' is displayed below it. If a user enters a random number and clicks on Search, the search result will be zero. Hence, this search should always be appended to an existing search and entering a numeric value for 'Sample Results Size' will further refine the search result based on the entry

For example, a user searches for a set of products below a hierarchy that displays a set of results which has 16 products. To do so they go to the Search tab > Search Below option in the Search dropdown > and choose what node to search below. For more on how to search below, see the **Search: Search Below** topic.

The screenshot displays two panels from the STIBO SYSTEMS interface. The left panel, titled 'Search', shows a search for 'Food and Beverage (8303)' with 16 results. The right panel, titled 'Search Result Profiling', provides a breakdown of the search results.

Name	ID
> 7133-12	8081
> 7134-24	8094
> Beverage	8315
> Evian Water, Single	8082
> Evian Water Family	8106
> Evian Water Family	8110
> EVN-06	110001
> EVN-06	8083
> EVN-12	8108
> EVN-24	20674
> Food and Beverage	8303
> Naive water_7132-06	8093
> Packaged Water	8316
> Packaged Water Items	8065
> Packaged Water Sales Items	8071
> Spring Water, Case of 24	107807

Search Result Profiling
 16 hit(s)
 Click links to narrow down search

Results by Object Type

- Product (16) - exclude
 - Item (4) - exclude
 - Sales Item (3) - exclude
 - Open Sales Item (2) - exclude
 - Level 1 (1) - exclude
 - Level 2 (1) - exclude
 - Level 3 (1) - exclude
 - Item Folder (1) - exclude
 - Sales Item Folder (1) - exclude
 - Item Family (1) - exclude
 - Sales Item Family (1) - exclude

Results by Position in Tree Hierarchy
 Results below child nodes of Food and Beverage

- Beverage (15) - exclude

Results by Parent
 (Displaying the 5 most common)

Now, the user wants to append the results with the 'Sample Result' search criteria. To do this they will keep their original search, but select the plus sign > Sample Results > and enter a number. In this example '10' is used to define the Sample Results Size. The search result will give random results.

Search

Search Below = Food and Beverage ✕

Sample Result ✕

Sample Result Size

▾
Reset
Search

Displaying 8 of 8 results Show Details

Name	>
> 7133-12 ID = 8081	
> 7134-24 ID = 8094	
> Evian Water, Single ID = 8082	
> Evian Water Family ID = 8106	
> Evian Water Family ID = 8110	
> EVN-24 ID = 20674	
> Packaged Water ID = 8316	
> Packaged Water Sales Items ID = 8071	

-Operations on Entire Result-

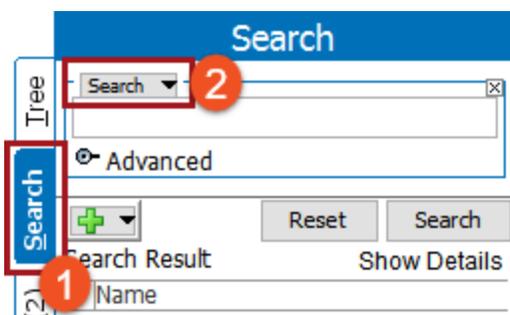
Notice that the results will display and not go above the specified sample results size number. If this Search button is clicked multiple times, the sample search results will change each time, though always staying below the specified sample number.

Search: Search Below

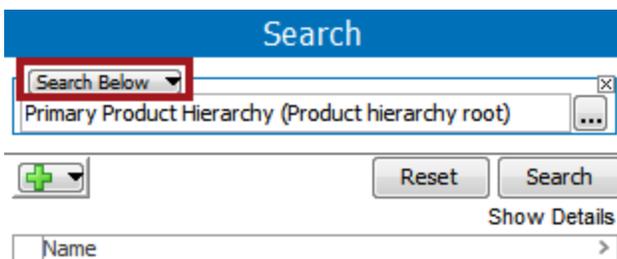
The **Search Below** Search Criteria allows you to limit your search result to objects below a specified node in the **System Setup** or **Tree** tab hierarchy.

Note: The search below option can be applied to the following object types only: attribute, classification, collection, entity, product, and publication.

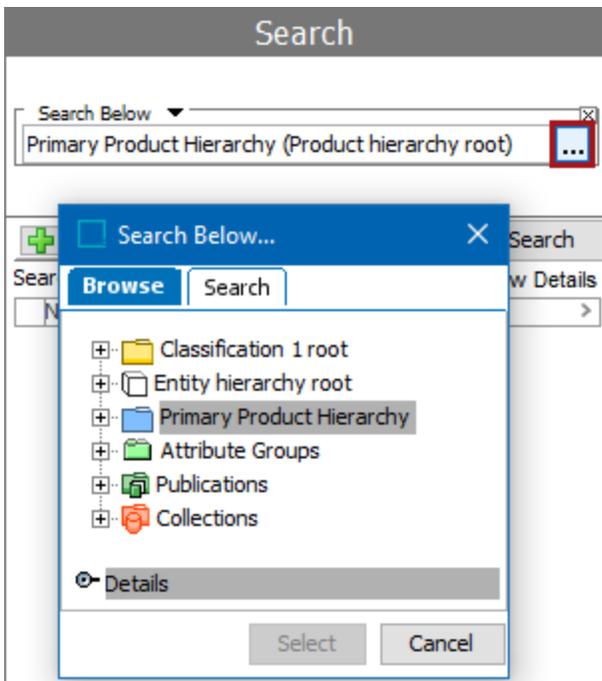
1. Click on the **Search** tab and click the Search dropdown.



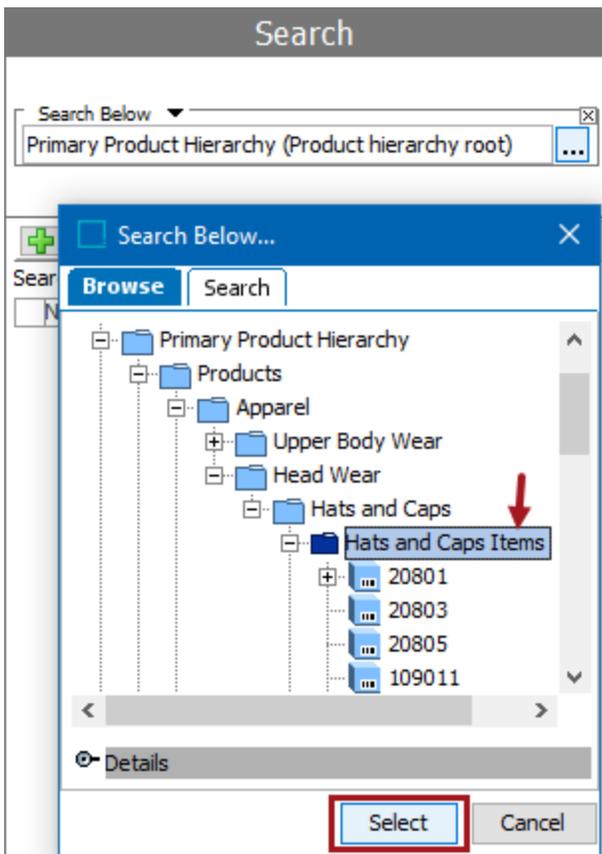
2. Select **Search Below** from the dropdown.



3. Click the ellipsis button (...) to display the **Search Below...** dialog. By default the Primary Product Hierarchy is selected as search criteria.



4. Select a node in the hierarchy and click the **Select** button.



5. Click the **Search** button

The screenshot shows a search interface with a blue header labeled "Search". Below the header is a search bar containing the text "Hats and Caps Items (20436)". To the left of the search bar is a dropdown menu labeled "Search Below". Below the search bar are three buttons: a green plus sign in a dropdown, a "Reset" button, and a "Search" button which is highlighted with a red border. Below the buttons is a "Show Details" link and a table header with the text "Name" and a right-pointing arrow.

The Results displayed includes only items at or below the selected node. Additionally, the selected node for the search below criteria will also be included in the search results. In the example shown below, Hats and Caps Items is also included in the search result

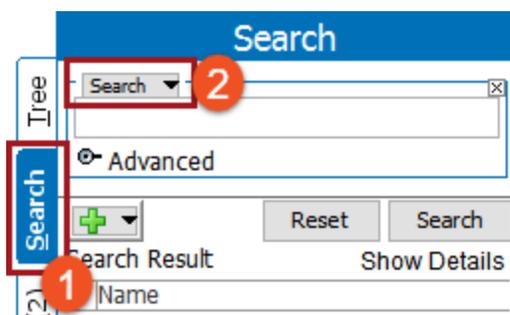
The screenshot shows the search interface after the search is executed. On the left side, there is a vertical navigation pane with three sections: "Tree", "Search", and "Processes (8)". The "Search" section is active. The search bar still contains "Hats and Caps Items (20436)". Below the search bar, the "Search" button is now highlighted with a blue border. Below the buttons, the text "Displaying 3 of 3 results" is shown. Below this is a table with the following data:

Name	
>	20803 ID = 20803
>	20805 ID = 20805
>	Hats and Caps Items ID = 20436

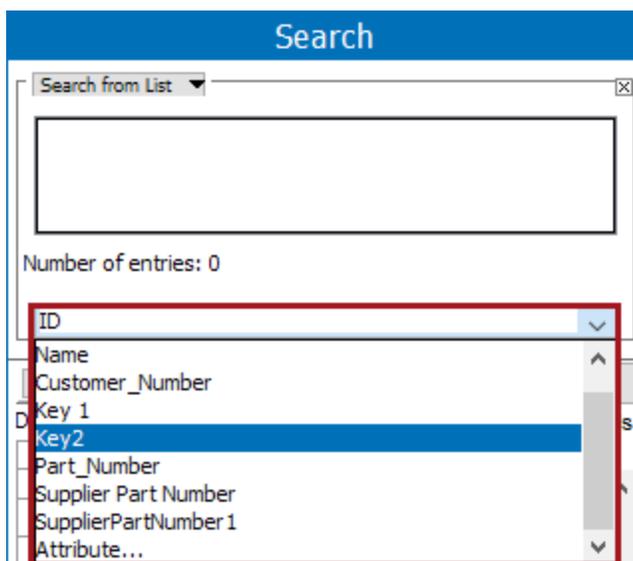
Search: Search from List

With the **Search from List** search criteria you can search using a list of data. This data can be manually entered into the user field or pasted in from another source, such as an Excel spreadsheet or Smartsheet. Users may specify whether the entered data should be used to search for object IDs, names, key values, attributes values (with specification of the particular attribute), or other criteria. This makes **Search from List** an efficient and easy way to find large numbers of objects in STEP and, in combination with other available search option, suitable for highly complex and extensive searches.

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Search from List** from the dropdown to display a text field and dropdown with a number of options based on your system.



In this example, we choose **Search from List: ID**, which allows specifying the data list in the text field and searching by 'ID' (selected from the dropdown).

3. Use one of the following methods to enter the data list you wish to search in the text box:

- Manually use the **Enter** key to create a line break between each value.
 - Copy data from Excel or any other application where line breaks or tabs are included to separate the values. Each value must be listed on a line or be separated by a tab delimiter, without any characters (including bullet indicators and spaces) around it. See the **Using a Data List from an External Application** section below.
4. If needed, click the green plus button (+) to add additional search criteria.
 5. Click on **Search** to run the search and view results.

Name	Image	ID
> No Primary Image		55 17739
>		20670-012 17739
>		20808-012 20808
>		20808-013 101567

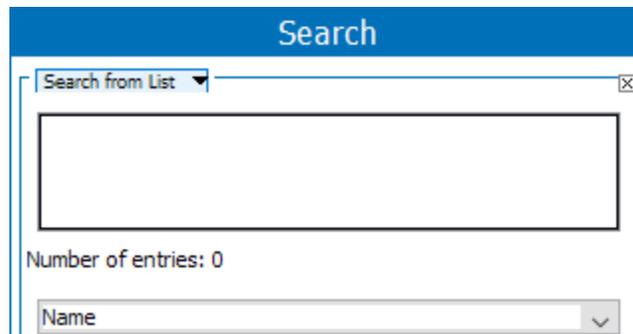
Each of the 'Search from List' options available from the dropdown are described and illustrated below.

Search from List: ID

Search by specifying the ID in the list text field and selecting 'ID' from the dropdown, as shown in the example above.

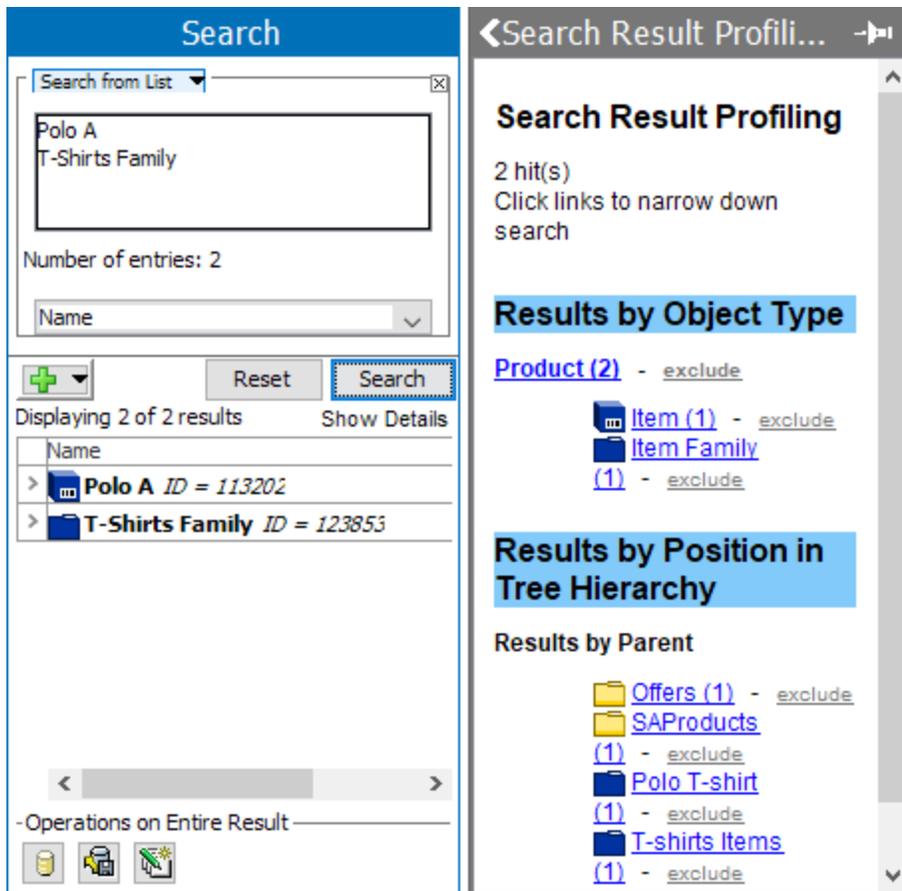
Search from List: Name

Search by specifying the object name in the list text field and by selecting 'Name' from the dropdown.



Enter the values to search into the text field. Click **Search** to run the search and view results.

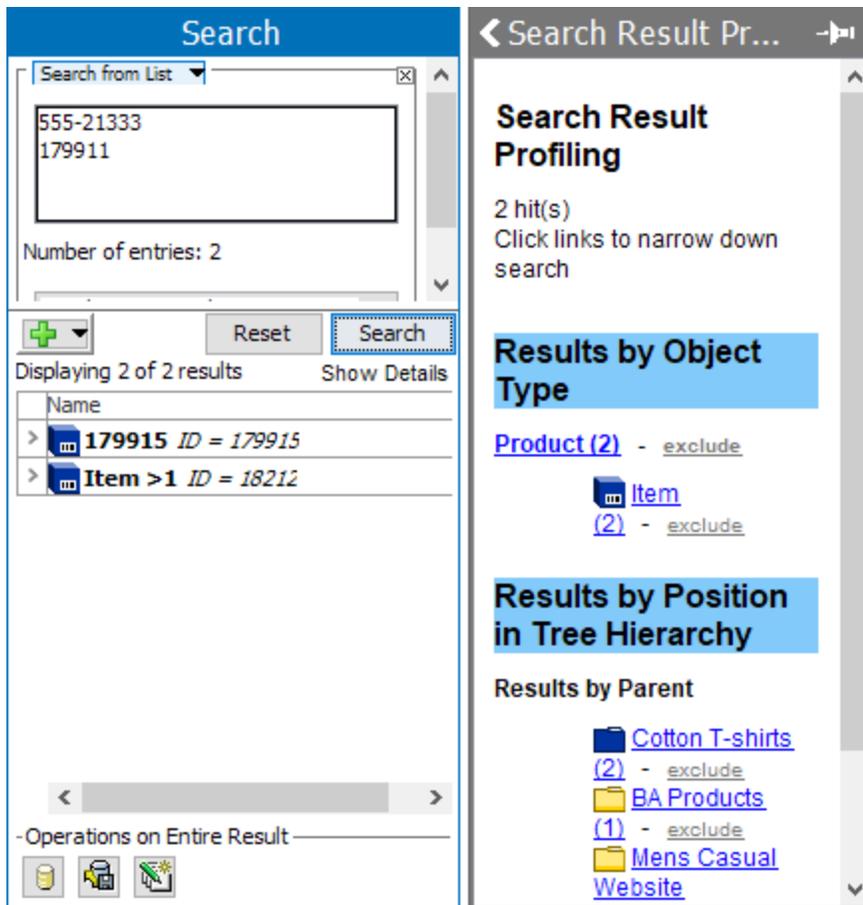
The search results display with the name of the objects specified in the data list.



Search from List: Key

Search by specifying the key values in the list text field, and by selecting the key from the dropdown.

In this example, the search results display with the Supplier Part Number that holds values specified in the data list.



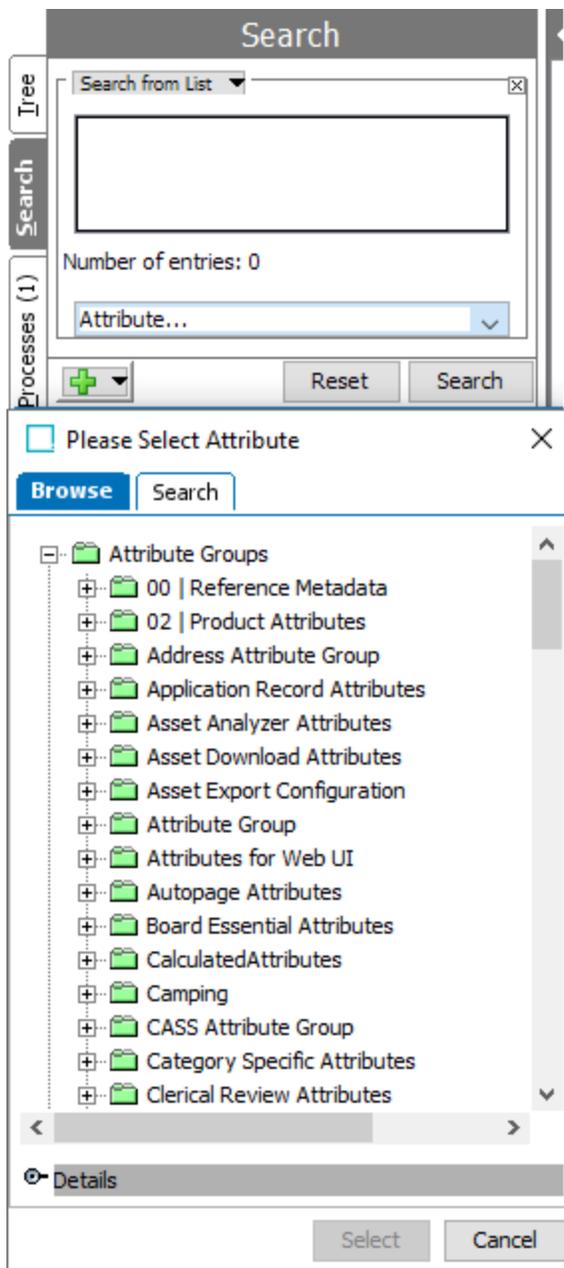
It is important to keep in mind that:

- Only active keys will be available as an option in the dropdown list.
- Active Keys that have values in products can be searched.
- Searching for active keys with empty values in a data list field will NOT return search results.

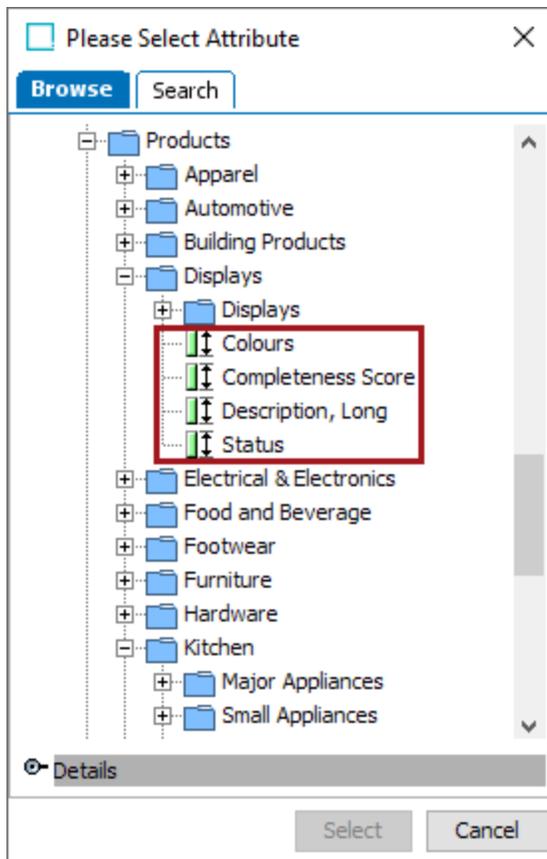
For more on keys and how to activate them, see the **Unique Keys** documentation.

Search from List: Attributes

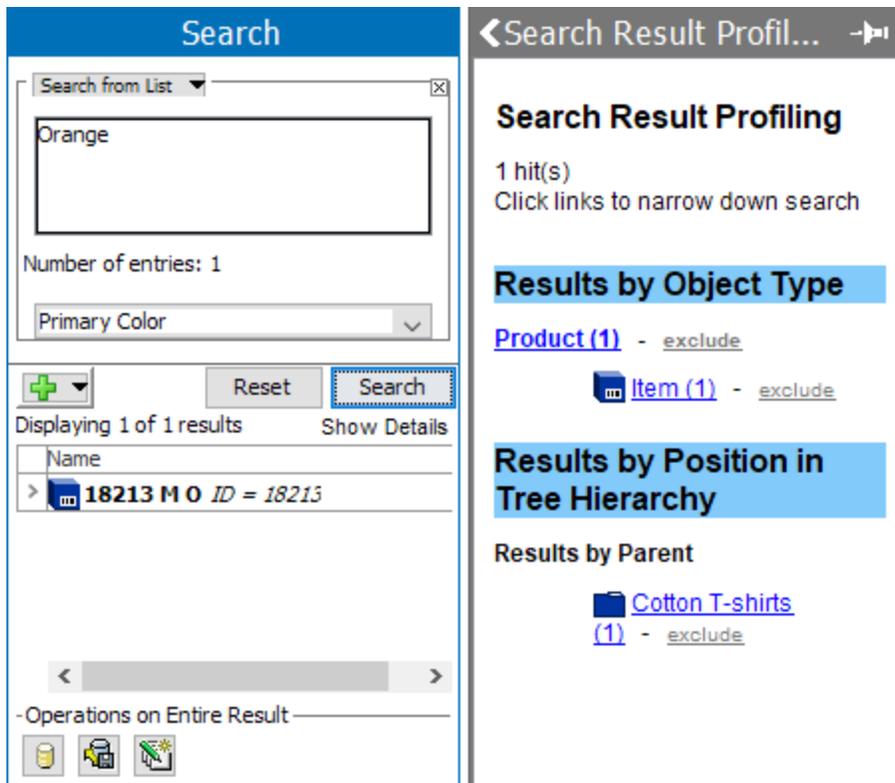
Search by specifying the attribute values in the list text field, and by selecting the option 'Attribute' from the dropdown.



Note: Description attributes are displayed under the product hierarchy node in the folders for which they are valid.



The search results display with the attributes specified, in this case it is the attribute 'Color' which holds values of 'Orange.'



It is important to keep in mind that:

- Only one attribute can be selected from the Attribute Group browse / search window to be used as search criteria.
- Inherited attribute values (hierarchical inheritance) can be specified in the data list. The result set includes the object that contains the searched value as a local value. While this object may not match an object type restriction, it points to the origination of the searched text.
- Attribute values inheriting from other contexts can be specified in the data list.
- Calculated Attribute value (description or specification attributes) when specified in data list, will NOT be displayed with any search result. (This restriction is not limited to the Search from List functionality.)

Using a Data List from an External Application

Copied data can come from Excel or any other application as long as line breaks or tabs are included to separate the values. To copy data in, each value must be listed on its own line or separated by a tab delimiter, (tab key from keyboard) without any characters (including bullet indicators and spaces) around it.

In the example below, IDs have been copied over from an external file. Data can be horizontal or vertical as long as the appropriate line breaks or tabs are in between the values.

Search

Search from List

Number of entries: 2

ID

Displaying 2 of 2 results

Name
> 18213 M O ID = 124148
> 18213 M O ID = 18213

-Operations on Entire Result-

Search

Search from List

Number of entries: 2

ID

Displaying 2 of 2 results

Name
> 18213 M O ID = 124148
> 18213 M O ID = 18213

-Operations on Entire Result-

Search: Search in Publication Hierarchy

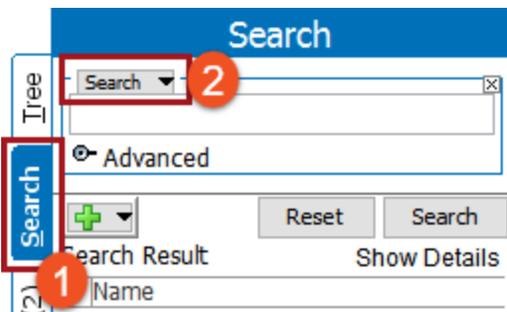
Objects below a specific publication hierarchy can be searched, and the status or a specific result can be determined, by using the 'Search in Publication Hierarchy.'

Keep in mind that this search is **not** used to search for different templates (such as products, publications, or page templates) or to search number of objects / links placed in product template. It is only used to search the objects below a specific publication hierarchy.

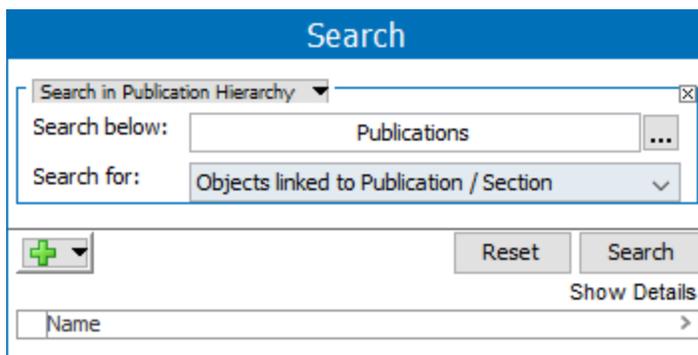
Note: To use 'search in publication hierarchy' in the Search tab, it is recommended to have prior knowledge of STEP Publisher and the publication hierarchy. For more information, see the **Publication Hierarchy** section of the **STEP Publisher (In Design)** documentation.

To search in a publication hierarchy:

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Search in Publication Hierarchy** from the dropdown.



Note: The search criteria requires no data input. However, it is helpful to further refine the search by pressing the plus sign button (+), and entering in information to limit the search results.

3. Supply information for the following parameters:

The screenshot shows a 'Search' dialog box with a blue header. Below the header, there is a 'Search in Publication Hierarchy' dropdown menu. The 'Search below:' field contains 'Publications' and has a three-dot menu icon to its right. The 'Search for:' field contains 'Objects linked to Publication / Section' and has a dropdown arrow to its right. Below these fields, there is a plus sign button with a dropdown arrow, a 'Reset' button, and a 'Search' button. At the bottom, there is a 'Search Result' section with a 'Name' field and a 'Show Details' button.

- **Search below:** Used for choosing a node. Select either the publication group or publication. The search result will display all matched product objects which are under the selected publication group or publication.
- **Search for:** Specifies what object is being searched.

Search for

The available options in the dropdown are:

The screenshot shows the same 'Search' dialog box as above, but with the 'Search for:' dropdown menu open. The menu items are: 'Objects linked to Publication / Section' (highlighted in blue), 'Objects linked to Publication / Section', 'Objects in Assortment Lists', 'Objects in Baskets', 'Objects on actual pages', and 'Objects on planned pages'. The plus sign button and other UI elements are visible in the background.

1. **Objects linked to Publication / Section:** When this option is selected, products and assets linked to a publication will be displayed in the result.

Search

Search in Publication Hierarchy ✕

Search below: ...

Search for: v

+ Reset Search

Displaying 7 of 7 results Show Details

Name
> 21933 ID = 21933
> 22196 ID = 22196
> 22200 ID = 22200
> Chardonnay Glasses - 4 ID = 8059
> Comfy Bed ID = 22155
> Comfy Footboard ID = 22168
> Luigi Bormioli Chardonnay Glass - 1 ID = 8063

-Operations on Entire Result-

Search Result Profiling

7 hit(s)
Click links to narrow down search

Results by Object Type

- [Product \(7\)](#) - [exclude](#)
- [Item \(6\)](#) - [exclude](#)
- [Open Item \(1\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

(Displaying the 5 most common)

- [Products \(3\)](#) - [exclude](#)
- [Beds \(2\)](#) - [exclude](#)
- [Products \(2\)](#) - [exclude](#)
- [Irons Items \(1\)](#) - [exclude](#)
- [Coffee Maker Items](#)
- [\(1\)](#) - [exclude](#)

2. **Objects in Assortment Lists:** This is a legacy component.
3. **Objects in Baskets:** The products saved in a Basket will be displayed in the results.

Tree

- GDSN
- GDSN Receiver
- Merge_Golden_Root
- Promotions
- Publications
 - Templates
 - Standard Publications
 - AutoPage Publications
 - Flatplanner Publications
 - Spring Wedding Catalog**
 - Commercial Data
 - Party Favors
 - 2 - Pages 2 & 3
 - 4 - Pages 4 & 5
 - 6 - Pages 6 & 7
 - DTP Documents
 - Glassware
 - DTP Documents
 - Cards & Stationery
 - 8 - (208225)

Spring Wedding Catalog - Plan

Page Inspector | Status | State Log | Tasks

AutoPage Publication Planner | Pagination Rules

Publication | **Plan** | Version | Pages | Publication Planner | Plan Notes | Financial Summary

Basket maintained locally

Column View: Default - Public | View Options

ID	Name	PrimaryProductImage
121183	Pink & Blue Giraffe Party Hat	
121218	Pink & Blue Owl Party Hat	

Flatplanner

Search

Search in Publication Hierarchy

Search below: Spring Wedding Catalog

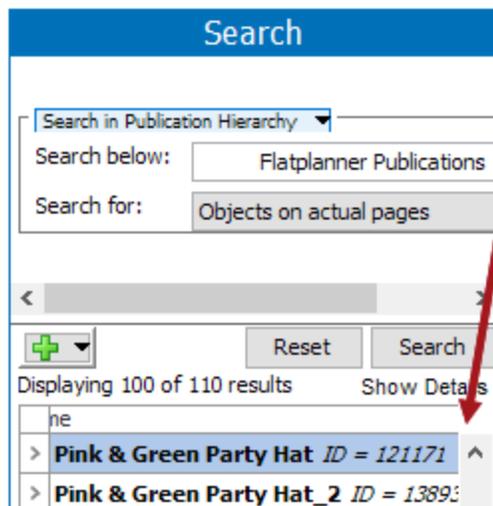
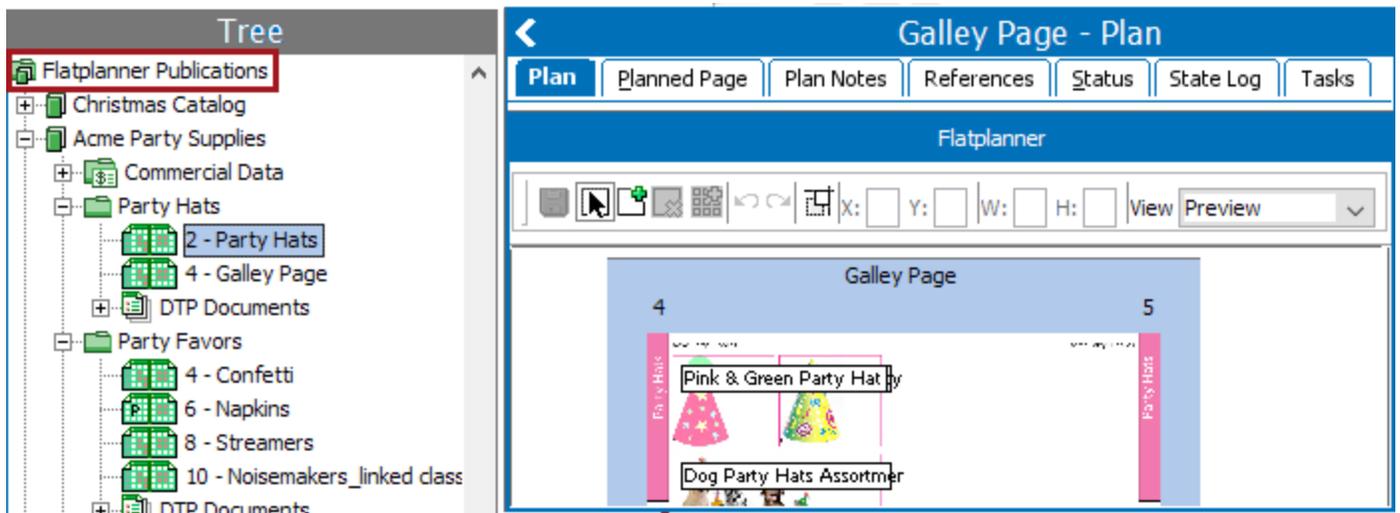
Search for: Objects in Baskets

Reset | Search

Displaying 25 of 25 results | Show Details

Name
> 18210 M B ID = 18210
> EVN-24 ID = 20674
> Pink & Blue Giraffe Party Hat ID = 121183
> Pink & Blue Owl Party Hat ID = 121218
> Politics Party Hats ID = 121192

4. **Object on actual pages:** the product and asset are used on actual pages (DTP documents) and will display the results field.



5. **Object on planned pages:** The products and assets used on planned pages will be displayed in the result.

Search

Search in Publication Hierarchy

Search below: Flatplanner Publications

Search for: **Objects on planned pages**

Reset Search

Displaying 28 of 28 results Show Details

Name
> 20714 ID = 20714
> Blue Wizard Balloon Hat ID = 121182
> Christmas Party Hat ID = 121184
> Cosmic Party Hat ID = 121177
> Dog Party Hats Assortment ID = 121190
> Pink & Blue Giraffe Party Hat ID = 121183

Operations on Entire Result

Tree

- Autopage Publications
- Standard Publications
- Flatplanner Publications
 - Spring Party Catalog
 - Commercial Data
 - Party Favors
 - 2 - Pages 2 & 3
 - 4 - Pages 4 & 5
 - 6 - Pages 6 & 7
 - DTP Documents
 - Cards & Stationery
 - Glassware
 - Spring Wedding Catalog
 - India Test
 - Publication Group
 - Primary Product Hierarchy
 - Products
 - Apparel

Pages 2 & 3 - Plan

References Status State Log Tasks

Plan Planned Page Plan Notes

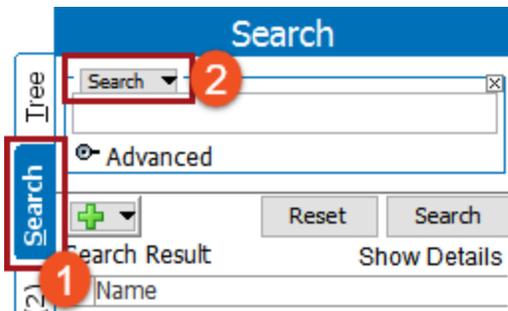
Flatplanner Show basket

Christmas Party Hat Purple & White Party Ha

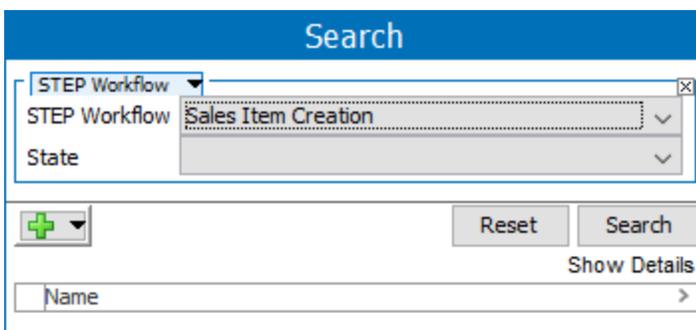
Search: STEP Workflow

With the **STEP Workflow** search criteria you can search for and monitor STEP workflows. Selecting a specific workflow from the dropdown list will show all items associated with the workflow. You can also specify the workflow state to narrow your search.

1. Click on the **Search** tab and click the Search dropdown.



2. Select **STEP Workflow** from the dropdown to display two additional dropdowns with options based on availability in your system.



In this example, 'Sales Item Creation' will be used for the STEP Workflow search field.

3. For the State dropdown, specify the state you wish to search within.
 - Select a state defined in the workflow to search only items currently in the state.
 - Select [any State] to search the entire workflow, as shown in this example.

The screenshot shows a search interface with a blue header labeled "Search". Below the header, there is a "STEP Workflow" dropdown menu set to "Sales Item Creation". Below that, a "State" dropdown menu is open, showing a list of options: "[any State]", "[not in STEP Workflow]", "Copy Writing", "Digital Asset Review", "New Digital Asset", "Sales Item Review", and "Web Categorize". The "[any State]" option is currently selected. To the left of the dropdown, there is a green plus button and the text "Displaying 0 of 0". Below the dropdown, there is a "Name" input field.

- Select [not in STEP workflow] to search objects which are not present in the selected workflow.

The screenshot shows the same search interface as above, but with the "State" dropdown menu set to "[not in STEP Workflow]". Below the dropdown, there is a green plus button, the text "Displaying 0 of 0 results", a "Reset" button, a "Search" button, and a "Show Details" link. Below these elements, there is a "Name" input field.

4. If needed, click the green plus button (+) to add additional search criteria.
5. Click **Search** to run the search and view results.

STEP Workflow [Sales Item Creation] State [any State]

Reset Search

Displaying 5 of 5 results Hide Details

Name
  18207-012 18207
  18214-012 18214
  18215-012 18215
  18217-012 18217
  101164 101164

Search Result Profiling

5 hit(s)

Click links to narrow down search

Results by Object Type

[Product \(5\)](#) - [exclude](#)

 [SalesItem \(5\)](#) - [exclude](#)

Results by Position in Tree Hierarchy

Results by Parent

 [T-shirts \(4\)](#) - [exclude](#)

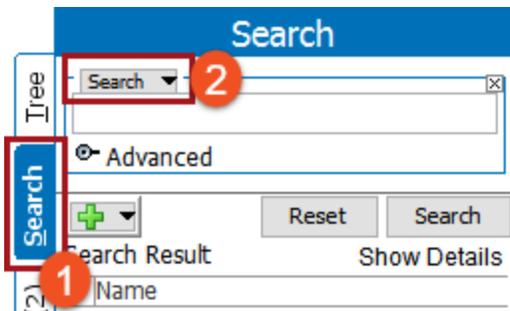
 [T-shirts and Sweatshirts \(4\)](#) - [exclude](#)

 [Tire Care SalesItems \(1\)](#) - [exclude](#)

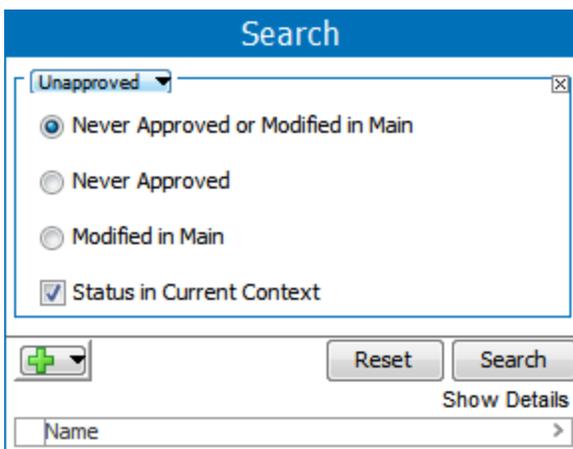
Search: Unapproved

This criteria is used to identify objects that are not currently approved. These include classifications, products, images and documents, and entities setup to be Workspace revisable.

1. Click on the **Search** tab and click the Search dropdown.



2. Select **Unapproved** from the dropdown.



3. Select the appropriate radio button and set the checkbox:

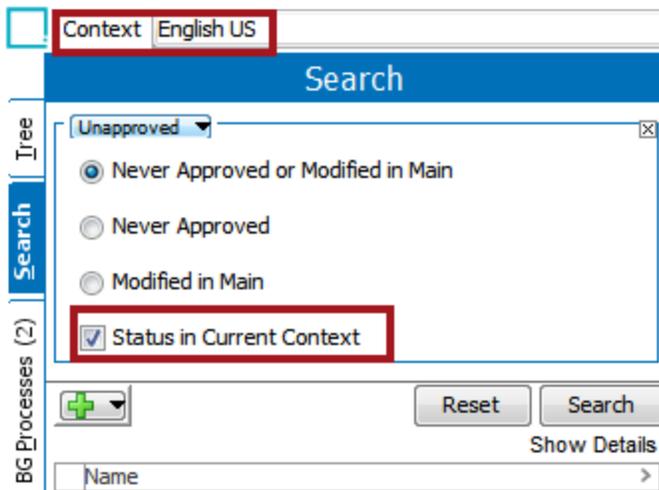
- **Never Approved or Modified in Main:** All objects that have 'Never been approved' and have been 'Modified in main'.
- **Never Approved:** Objects (products, classifications, assets & documents, or entities) that are workspace revisable and that have never been approved.

Black Lamp rev.0.1 - Product		
Images & Documents	Commercial	Tables
Category Profile	Proof View	Status
State Log	Tasks	
Product	Sub Products	References
Description		
Name	>	Value
> ID		SP208653-2
> Name		Black Lamp
> Object Type		Active Products
> Revision		0.1 Last edited by USERM on Wed Jul 26 08:48:51 EDT 2017
> Approved		 Never Been Approved
> Translation		Not Translated
> Path		Primary Product Hierarchy/Products/Hardware/Tools/Task Lighting/Desk Lamps/Desk La

- **Modified in Maintenance:** Objects that are modified after the approval or added to in the maintenance workspace.

Description		
Name	>	Value
> ID		120223
> Name		120223
> Object Type		Open Item
> Revision		0.6 Last edited by USERJ on Wed May 31 08:42:19 EDT 2017
> Approved		 Last Approved on Mon Nov 02 10:37:35 EST 2015
> Translation		Master
> Path		Primary Product Hierarchy/Products/Electrical and Electronics/Wire & Cable/Cable/Cable Ite...

- **Status in Current Context:** When this box is checked, only the current context is searched. If unchecked, all objects in all contexts are searched.



Context English US

Search

Unapproved

Never Approved or Modified in Main

Never Approved

Modified in Main

Status in Current Context



Show Details

Name >

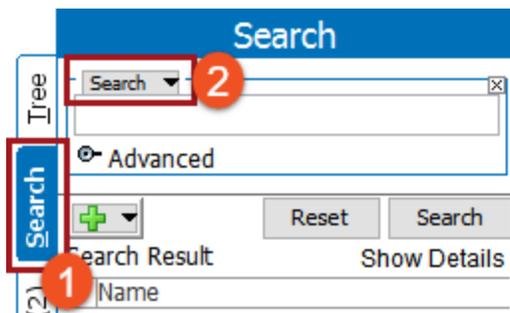
4. If needed, click the green plus button () to add additional search criteria.
5. Click **Search** to run the search and view results.

Search: Unpushed or Failed Assets

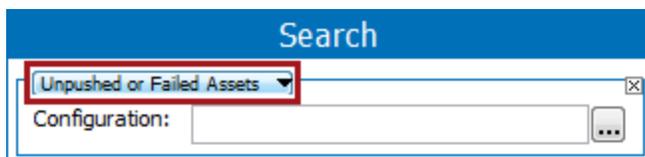
The Unpushed for Failed Assets search criteria allow you to identify assets that have not been successfully pushed. These assets have an Asset Push Status of 'Never been handled', 'Asset not in workspace,' or 'Error.'

555-2033_M rev.1.0 - Status					
Images & Documents	References	Referenced By	Status	State Log	Tasks
Revisions					
Workspaces					
Translation					
Asset Push Status					
Configuration	Asset Push Status	Relative Path	Workspace	Visibility	
> Asset Push Configuration 1 B	✓ Downloaded	AssetPushConfig1B/88/01/8801.jpg	Main		
> raw-main	Never been handled		Main		
> Asset Push Configuration 1 A	Asset not in workspace		Approved		
Approval status in all contexts					
Hidden values					
Diagnostics					

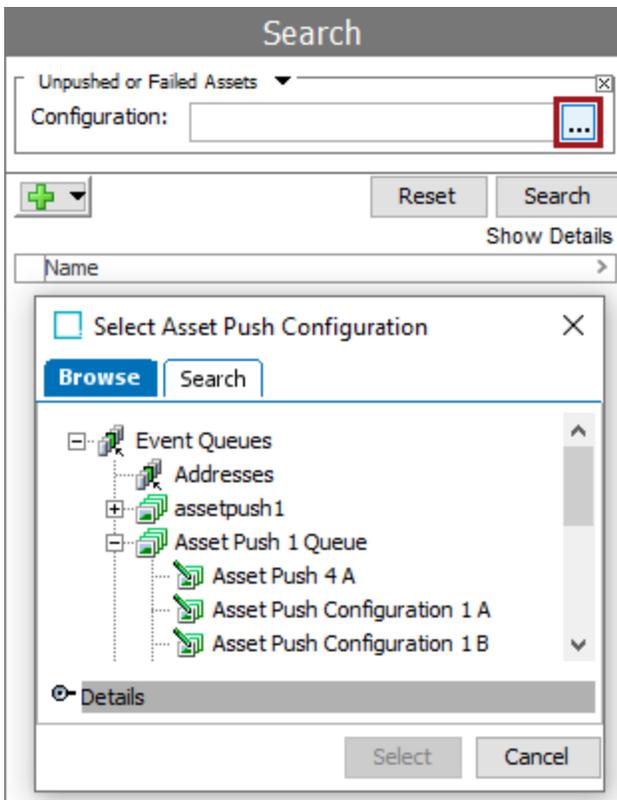
1. Click on the **Search** tab and click the Search dropdown.



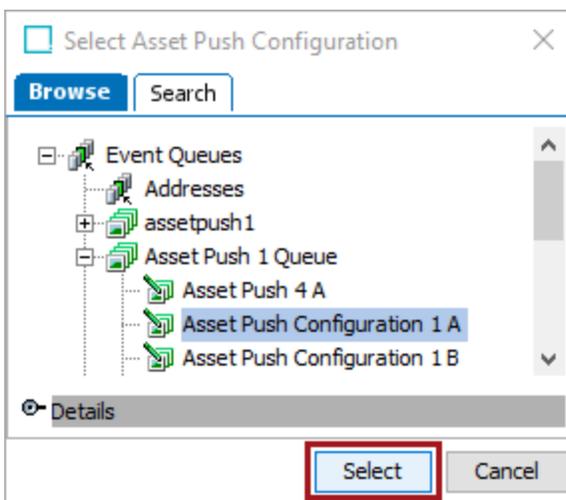
2. Select **Unpushed or Failed Assets** from the dropdown.



3. Click the ellipsis button (...) to display the **Select Asset Push Configuration** dialog.



4. Select a configuration and click the **Select** button.



5. Click the **Search** button to display the Search Results List and Profiling information.

Search

Unpushed or Failed Assets

Configuration: Asset Push Configuration 1 A (AssetPushConfig1)

Reset Search

Displaying 58 of 58 results Show Details

Name
> 555-2033_M ID = 8801
> 20695 back ID = 20700
> 20695 main ID = 20701
> 20695 side ID = 20702
> 910835 ID = 910835
> 910836 ID = 910836
> ACME Comfy bed ID = 22215
> Battery ID = 22326
> blue cap ID = 20805
> Caulk, case ID = 8235
> Caulk, single ID = 8236
> Coffee Maker ID = 22191
> Cup1 ID = 28062
> Cup2 ID = 28063
> Cup3 ID = Cup3
> display ID = 22510

Search Result Profiling

58 hit(s)
Click links to narrow down search

Results by Object Type

[Asset \(58\)](#) - exclude

- [Product Image \(40\)](#) - exclude
- [Owners Manual \(6\)](#) - exclude
- [Export Manager Configuration \(2\)](#) - exclude
- [Logo \(2\)](#) - exclude
- [Icon \(2\)](#) - exclude
- [Installation Manual \(2\)](#) - exclude
- [Import Manager Configuration \(2\)](#) - exclude
- [Assets \(1\)](#) - exclude
- [Configuration \(1\)](#) - exclude

Results by Position in Tree Hierarchy

Results by Parent
(Displaying the 5 most common)

- [Assets \(17\)](#) - exclude
- [MA \(7\)](#) - exclude

Note: Click an item in the list to view it, or click a profiling link to update the search results list.

STEP Workbench Keyboard Shortcuts

Within STEP Workbench there are many shortcut key combinations that allow users to quickly navigate and make changes through the system. The following tables list and describe the options available for Shortcut Key options.

Basic Shortcuts

Shortcut	Description	Shortcut Key
Copy	Creates a duplicate of the information selected that can be pasted somewhere else.	Ctrl + C
Cut	Takes away information that can be pasted into a different location if desired.	Ctrl + X
Duplicate	This duplicates the item selected, with the option to duplicate references as well.	Ctrl + J
Goto	This brings the user to the Goto field in the upper right hand corner of the workbench screen where items are looked up.	Ctrl + G
Goto Next	Finds the next item that most closely matches what the user is looking for. The results may differ depending on what tab the user is in and working with, or what area is selected as active.	Ctrl + E
Help	When Workbench is open, it will populate another window that provides all of the Online Help Documentation.	F1
Next	Shifts the focus to the next cell.	Tab
Paste	When information that was either cut or copied from before is placed into an alternate area.	Ctrl + V
Previous	Shifts the focus to the previous cell.	Shift + Tab
Redo	Goes to the changed state, if the change was reversed.	Ctrl + Shift + Z
Reload	Reloads the workbench and updates to any changes made.	F5

Shortcut	Description	Shortcut Key
Select All	When the desired area is clicked in or is already the active area, pressing this key combination will choose everything in this particular area.	Ctrl + A
Undo	Goes back to the original state before the change was made.	Ctrl + Z

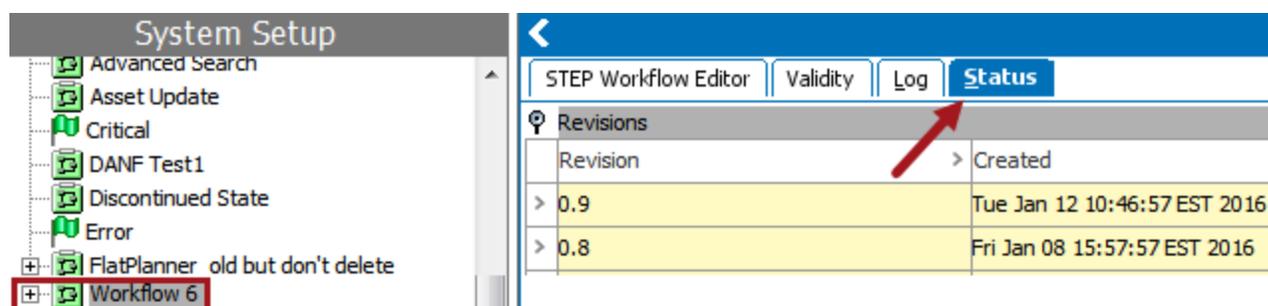
Navigate to Main Side Bar Tabs in Workbench

Shortcut	Description	Shortcut Key
Background Process Tab	Unless a product is being viewed, this will bring the user to the Background Processes tab. If a user is on a product, this key combination will not transpire.	Alt + P
Bookmarks	Brings the user to the Bookmarks side tab.	Alt + M
System Setup Tab	Brings the user to the System Setup tab.	Alt + Y
Search Tab	Leaves the user looking at what they were on in the main frame, but brings up the Search Tab along the left hand side.	Ctrl + F
Tree Tab	This will bring a user to the Tree Tab only if not viewing an item in Tree in the main screen, or having an item still show up in the main screen even though navigation has been away from it.	Alt + T
Workflow Tab	Navigates to the STEP Workflows tab.	Alt + W

Navigate to Horizontal Tabs within Main Sidebar Tabs

To navigate to the horizontal tabs within the main tabs in workbench, press Alt + (the letter underlined on the tab).

For example, if a workflow is selected within System Setup, pressing **Alt + S** displays the **Status** tab for the workflow being viewed because 'S' is the underlined letter for the Status tab.



Note that options for shortcut keys to horizontal tabs vary depending on what item is selected and in what main tab a user is located (Tree, Search, Background Processes, System Setup, Bookmarks, and STEP Workflow). Not all tabs have underlined letters for shortcut key options.

General Shortcuts Useful in Workbench

Shortcut	Description	Shortcut Key
Add Bookmark	When on an object and this is pressed, it will add the item to the bookmark list on the Bookmark tab.	Ctrl + D
Add Element	When adding various elements, pressing this key combination will often (not in all cases), bring up a dialog allowing the user to add to the desired list.	Ctrl + Plus
Approve Object	When in Main, approves an object that was previously unapproved.	Ctrl + Shift + J
Mark Different (On multi-product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, selecting this key combination will mark all areas that are different green.	Shift + F12
New Window	With STEP Workbench open, this will open an additional STEP Workbench window.	Ctrl + N
Remove Element	When deleting various elements from lists or rows, pressing this key combination will often remove the desired connection or item.	Ctrl + Minus
Rotate Table (On Multi-Product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, this rotates the table view if the table is the active area.	F11

Shortcut	Description	Shortcut Key
Toggle attribute values selection between blinking cursor and blue filter	When on a field that is editable, selecting F2 allows the user to write in the field. When pressed again, the entire field turns blue, rendering it entered and non-editable, unless F2 is pressed again or the field is clicked into again.	F2

Insert Options

Shortcut	Description	Shortcut Key
Insert Action Set	In System Setup, when in the Action Sets, pressing this key combination will create a child Action in an Action set.	Ctrl + Shift + S
Insert Asset	The Create Asset dialog appears when in Tree.	Ctrl + Shift + A
Insert Attribute	Displays the Create Attribute dialog in System Setup.	Ctrl + Shift + T
Insert Attribute Group	In System Setup, this creates a new Attribute Group if sitting on the proper level.	Ctrl + Shift + I
Insert Background Process to Monitor Deadlines / STEP Workflow Deadline Monitoring	This allows a user to set up a background process to monitor states with exceeded deadlines in the desired time frame.	Ctrl + Shift + D
Insert Character Tag	When typing in a field and this is selected, a dialog appears allowing the user to select from character tags.	Ctrl + R
Insert Classification	In Tree, this inserts a new yellow folder, or classification.	Ctrl + Shift + C
Insert Classification Root	In Tree, a new Classification Root or top node yellow folder is created.	Ctrl + Shift + R

Shortcut	Description	Shortcut Key
Insert Dimension	In System Setup, when sitting on the top node for contexts, clicking these keys will bring up the dialog to create a new dimension.	Ctrl + Shift + D
Insert Dimension Point	In System Setup, when on a dimension, selecting this will create the dimension point.	Ctrl + Shift + M
Insert Group	In System Setup, when on the node that houses Users and Groups, selecting this key combination will create a new group.	Ctrl + Shift + G
Insert List of Values	In System Setup, when sitting on the top node for List of Values, pressing this will bring up the dialog to create a new List of Values.	Ctrl + Shift + L
Insert non-breaking space	Enters a non-breaking space when editing attribute values.	Ctrl + Enter
Insert Orphan Attribute	When on a product, this will insert an orphan Attribute, which will appear in italics.	Ctrl + Shift + O
Insert Product	When in Tree, this will create a new object under the one selected.	Ctrl + Shift + P
Insert Special Character	When in a field that allows typing, selecting this brings up a list of characters that can be selected and inserted into the field.	Ctrl + Shift + E
Insert STEP Workflow	In System Setup, when on the top node for workflows, or when inside the node for workflows, selecting this will bring up a new STEP Workflow Designer window to create a new workflow.	Ctrl + Shift + R
Insert Workspace	In System Setup, when on a workspace, selecting this key combination will create a different workspace.	Ctrl + Shift + W

Linking Options

Shortcut	Description	Shortcut Key
Link Asset	When on References or References By tab, this allows asset links or references to be selected and put into the appropriate folders. Note that the Reference Type can be changed from the drop-down menu in the dialog that appears.	Ctrl + Shift + F
Link Attribute to Classification	To link an Attribute to an item, select the item that needs the attribute and select this key combination. Linked attributes will appear in the References tab under the 'Attributes' flipper.	Ctrl + Shift + Y
Link Attribute to Product	When on a product, selecting this key combination links an attribute to a product.	Ctrl + Shift + K
Link Classification to a Product	This links a classification to a product. It can be seen under the Reference tab under the 'Linked Attributes to Classifications Hierarchy' flipper.	Ctrl + Shift + H
Paste Link	Creates a new reference (pointer or link) to an existing / copied object. An example would be if the user copied a SKU from a blue folder and pasted it into the yellow folders. Note that object types need to be compatible.	Ctrl + L
Link Product / Create Link	When on References or References By tab, this allows product links or references to be selected and put into the appropriate folders.	Ctrl + Shift + Q

Style Options

Shortcut	Description	Shortcut Key
Bold	When typing in a field, this activates bold text.	Ctrl + B
Character Tag	Opens the Insert Character Tag dialog for adding character tags to attribute values.	Ctrl + R
Italic	When typing in a field, this activates italic text.	Ctrl + I
Non-breaking	Enters a non-breaking space when editing attribute values.	Ctrl +

Shortcut	Description	Shortcut Key
Space		Enter
Special Character	Opens a dialog showing the most recently used special characters, as well as an option to select to see all special characters. Allows user to select a special character to insert when editing attribute values.	Ctrl + Shift + E
Style	This key combination can be pressed to bring up the Style box, where there are a number of styles to choose from.	Ctrl + Y
Rich Text Editor	Opens the Rich Text Editor in STEP Workbench when editing an attribute value.	Alt + F2
Paste and Match Style	When in a field, if 'text A' is copied from one area and is going to be pasted into 'text B' that is a different style, pressing this key combination will make it so the copied 'text A' will past into 'text B' with the style of 'text B'.	Ctrl + Shift + V

Flatplanner Shortcuts

Shortcut	Description	Shortcut Key
Save (In Flatplanner)	This save what is being worked on.	Ctrl + Alt + S
Zoom In (In Flatplanner)	This zooms in on what is being worked on.	Ctrl + Plus
Zoom Out (In Flatplanner)	This zooms out of what is being worked on.	Ctrl + Minus