



# USER GUIDE

## Supplier Web UI

Rel. 10.3-MP4 (March 29, 2022)

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# Supplier Web UI

## Introduction

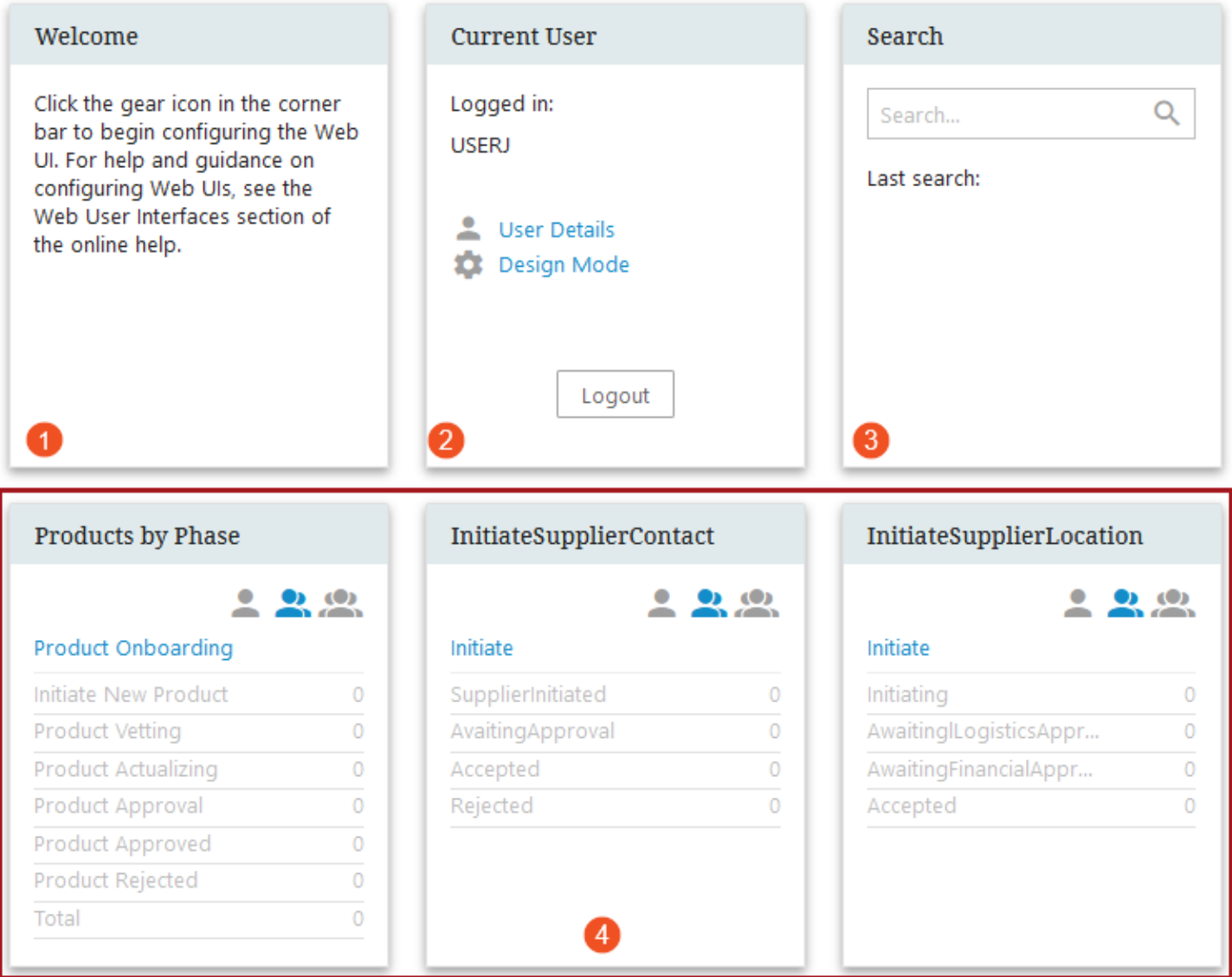
The purpose of the Supplier Web UI is to enable users to initiate and maintain products and entities through a workflow. The users could be external supplier users or internal users. Each workflow state has a dedicated screen with selected fields that can be maintained.

This guide contains information about how to use the Supplier Web UI, which can be accessed via a web browser.

## Homepage Widgets

The following widgets were created for the Supplier MDM Web UI.

# Welcome to the STEP Web UI



The screenshot displays the STEP Web UI dashboard with four main sections:

- Welcome (1):** Contains instructions to click the gear icon in the corner bar to begin configuring the Web UI. It references the Web User Interfaces section of the online help.
- Current User (2):** Shows the user is logged in as 'USERJ'. It includes links for 'User Details' (with a person icon) and 'Design Mode' (with a gear icon), and a 'Logout' button.
- Search (3):** Features a search input field with a magnifying glass icon and a 'Last search:' label below it.
- Workflow Widgets (4):** A group of three widgets, all enclosed in a red border:
  - Products by Phase:** A table with 8 rows and 2 columns. The first column lists product phases, and the second column shows counts.
 

Phase	Count
Product Onboarding	
Initiate New Product	0
Product Vetting	0
Product Actualizing	0
Product Approval	0
Product Approved	0
Product Rejected	0
Total	0
  - InitiateSupplierContact:** A table with 5 rows and 2 columns. The first column lists contact statuses, and the second column shows counts.
 

Status	Count
Initiate	
SupplierInitiated	0
AwaitingApproval	0
Accepted	0
Rejected	0
  - InitiateSupplierLocation:** A table with 5 rows and 2 columns. The first column lists location statuses, and the second column shows counts.
 

Status	Count
Initiate	
Initiating	0
AwaitingLogisticsAppr...	0
AwaitingFinancialAppr...	0
Accepted	0

- Welcome** - This widget can be customized to give Supplier users instructions on the Web UI that they use.
- Current User** - This widget shows the user currently logged into this Web UI and allows for the user to change details, enter the Design Mode, or log out.
- Search** - Finds nodes with an ID or name matching the search phrase.
- Workflow Widgets** - These configured widgets will track products or entities that have been onboarded as well as Supplier contacts and the locations.

## Logging In

To log in to the User Web UI you must enter a valid username and password. Then click the Login button.



Development

[Forgot password?](#)

Locale

English (United States) ▼

Login

You will now be logged in to the Supplier Web UI and be able to view, edit, and save product information based on the privileges applied to you by your administrator.

## Workflow and States

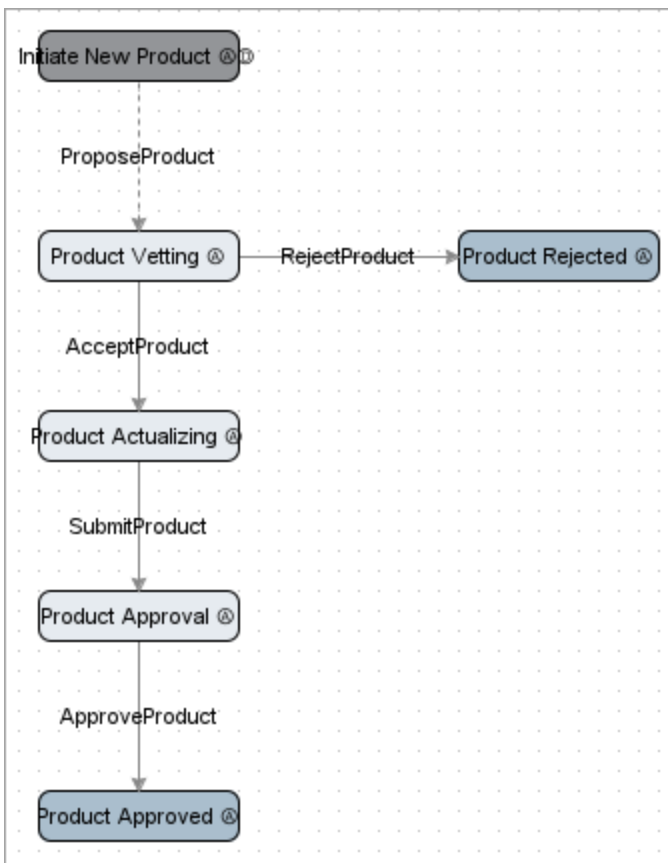
The Supplier Web UI is based on a workflow that lets the users select products and entities in a particular state, maintain products and entities, and subsequently submit products and entities to another state.

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

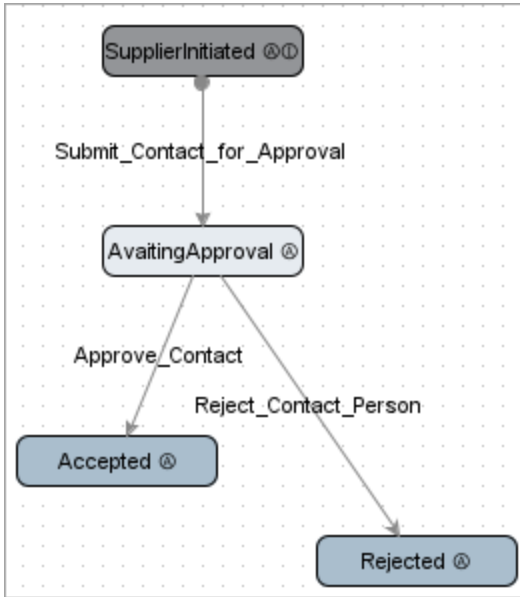
**Web User Interfaces / Web UI Setup and User Guide** documentation or the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** documentation.

The follow examples are default workflows for products and entities. These examples are able to be customized per the users' needs.

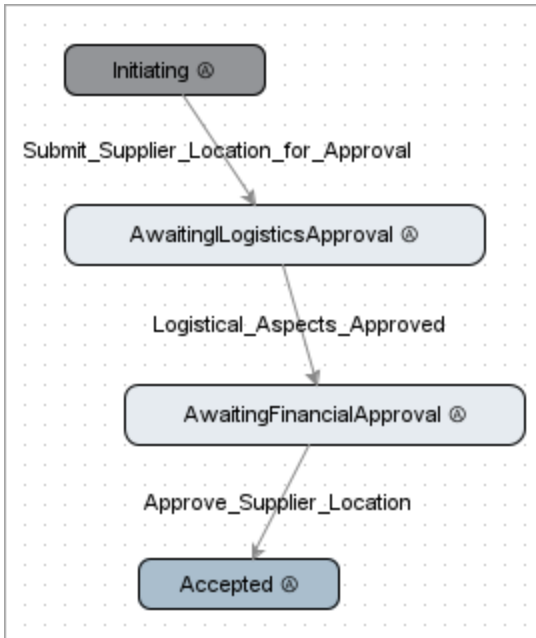
### Initiating a Supplier Product Workflow



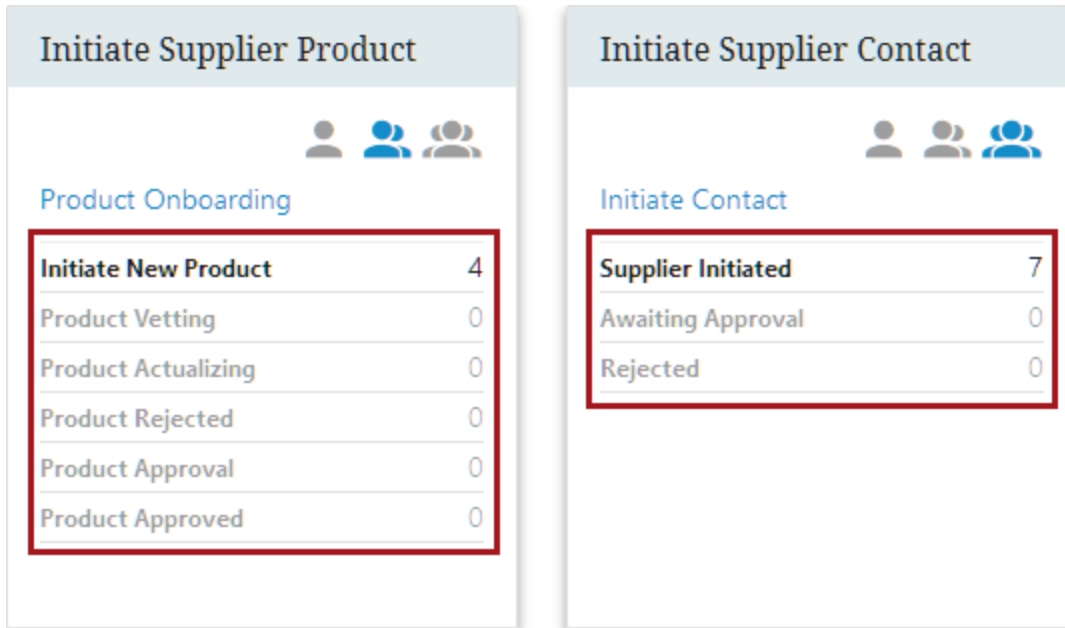
### Initiating a Supplier Contact



### Initiating a Supplier Location



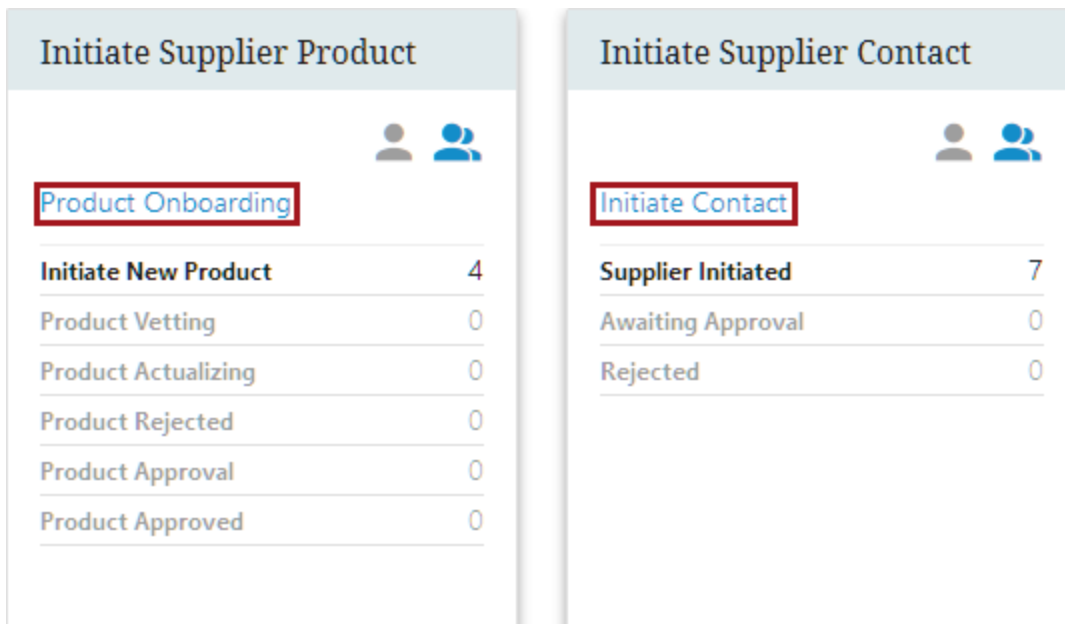
The Status Selector Homepage widgets on the home page screen shows the number of objects for each state.



The idea is that a supplier user initiates a product, another (possibly internal) user enriches the product with additional information, a third user (internal marketing employee) updates marketing relevant information. The final state is 'Remove\_Object\_From\_Workflow' meaning that the product has successfully been transitioned and maintained through the workflow using the Supplier Web UI.


Each state can be restricted to a specific User Group meaning that only this User Group can view and maintain products in that state.

## Initiating Products



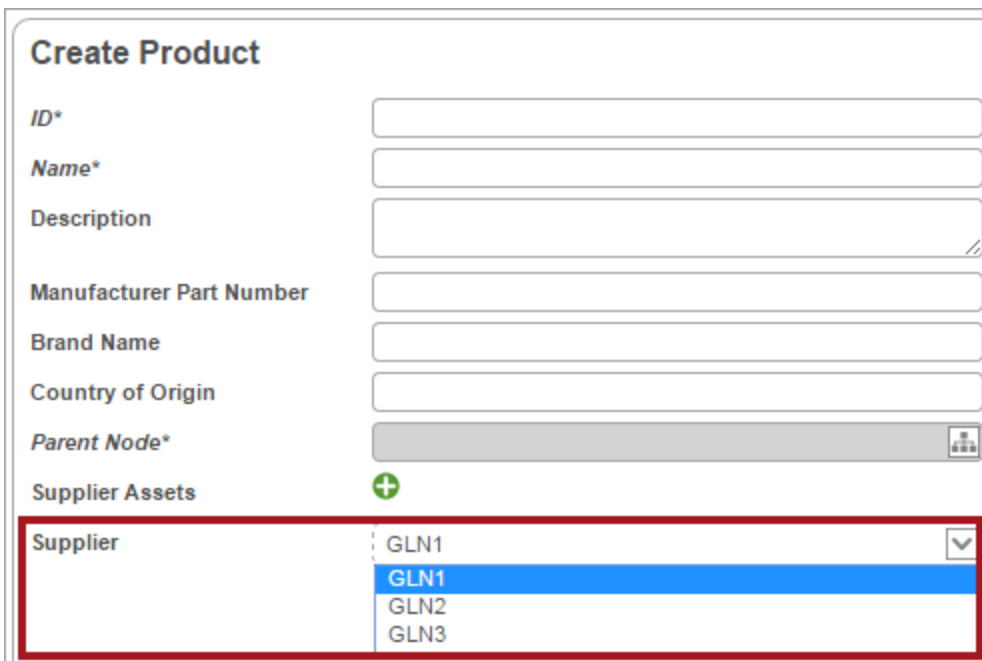
To initiate a new product, click 'Create new...' in the state selector box. This will give you an edit screen where you must supply some basic information such as ID, Name and placement of the product. Optionally you can also enter some descriptive text and/or add the product to a batch.

## Save

Clicking the  Save button saves the product in the data base and the product is submitted into the first state in the workflow.

## All-View Across Multiple Suppliers

If a supplier user is a member to more than one supplier group and the setting 'Enable all-view for users that are a member of multiple suppliers' is set to Y(es) the supplier user will have to choose to which supplier group the created product should be created to. See the **Supplier Web UI Setup Guide** documentation.



The screenshot shows a 'Create Product' form with the following fields:

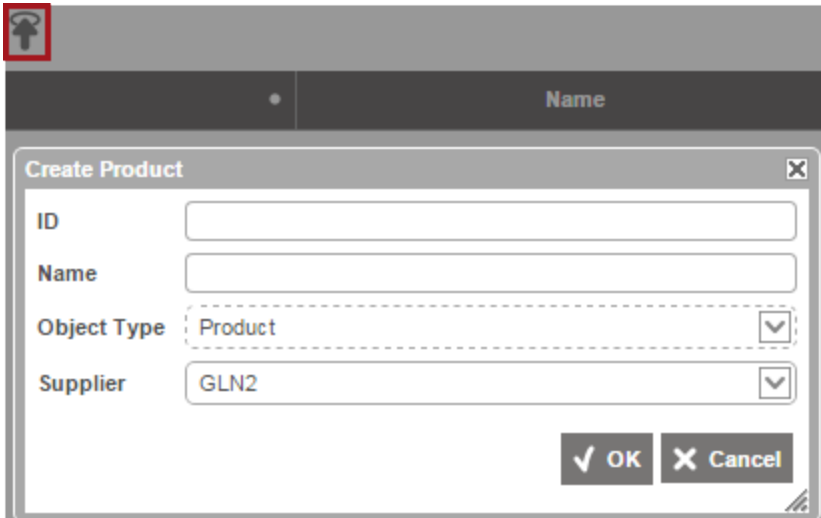
- ID\*
- Name\*
- Description
- Manufacturer Part Number
- Brand Name
- Country of Origin
- Parent Node\*
- Supplier Assets (with a green plus icon)

The 'Supplier Assets' dropdown menu is open, showing a list of options: GLN1, GLN1, GLN2, and GLN3. The first 'GLN1' option is highlighted in blue. The dropdown menu is enclosed in a red rectangular box.

When adding images the supplier user will have to choose to which supplier group the image should be added to or if the asset should be added to all accessible supplier groups.

**Note:** If a supplier user with access to more than one supplier adds an asset to a product only supplier users with access to the same product AND access to the same asset, the user will also be able to view the asset on the product.

It is also possible for a supplier user to create products when standing in the blue hierarchy using CreateSupplierProductToolBarAction:



In the object type selector it is possible to choose among all valid object types for where in the blue hierarchy the user is invoking this toolbar action.

And supplier users having access to more than supplier group will have to choose to which supplier group it should be made available.

Likewise it is possible to add assets to a supplier group when standing in the blue hierarchy with the CreateSupplierAssetToolbarAction component.

## Maintaining Products

To maintain products within the Supplier Web UI you must first select a state in the State selector box.

### Initiate Supplier Product

Product Onboarding

<b>Initiate New Product</b>	<b>4</b>
Product Vetting	0
Product Actualizing	0
Product Rejected	0
Product Approval	0
Product Approved	0

### Initiate Supplier Contact

Initiate Contact

<b>Supplier Initiated</b>	<b>7</b>
Awaiting Approval	0
Rejected	0

This will give you the list of products currently in the selected state.

Thumbnail	ID	Title	Object Type	AssignToMe
	EXA-5002-1013	EXA-5002-1013	Product	
	EXA-5002-1014	EXA-5002-1014	Product	
	EXA-5002-1015	EXA-5002-1015	Product	

Notice the column 'AssignToMe.' Each task has an icon that allows the user to assign the task to himself ( ) or assign it back to the previous task owner or default group ( ), if the icon is clicked.

Click the ID of one of the products to get the maintenance screen for that state.

### Example of a maintenance screen

Maintenance screens are highly configurable and are explicitly designed for a specific state. The following example of a maintenance screen for the Enrich state illustrates the idea of the maintenance screens.

**Enrich** < 1/3 > EN All All Main

ID: Product01

Name:

Description:

Brand Name:

Country of Origin:

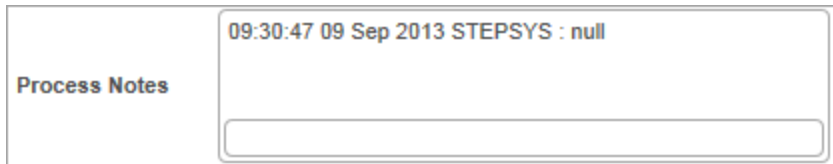
Primary Image:

Process Notes:

You can change the name of the product and optionally add a Process Note.

## Process Notes

A process note is a text that you can enter to describe or explain something that you find relevant for the current product in the current state. The process note can be viewed in the following states in the workflow and can thus be used to give a message to users that will maintain the product in following state.



1. Enter some text in the text field.
2. Click the Save button.
3. The text entered will now be displayed in the message area tagged with date, time and user. You can also click the Save and Submit button to save the Process Note.

## Primary Image

One or more images can be uploaded and/or referenced to a product.

### Reference an image from your hard drive

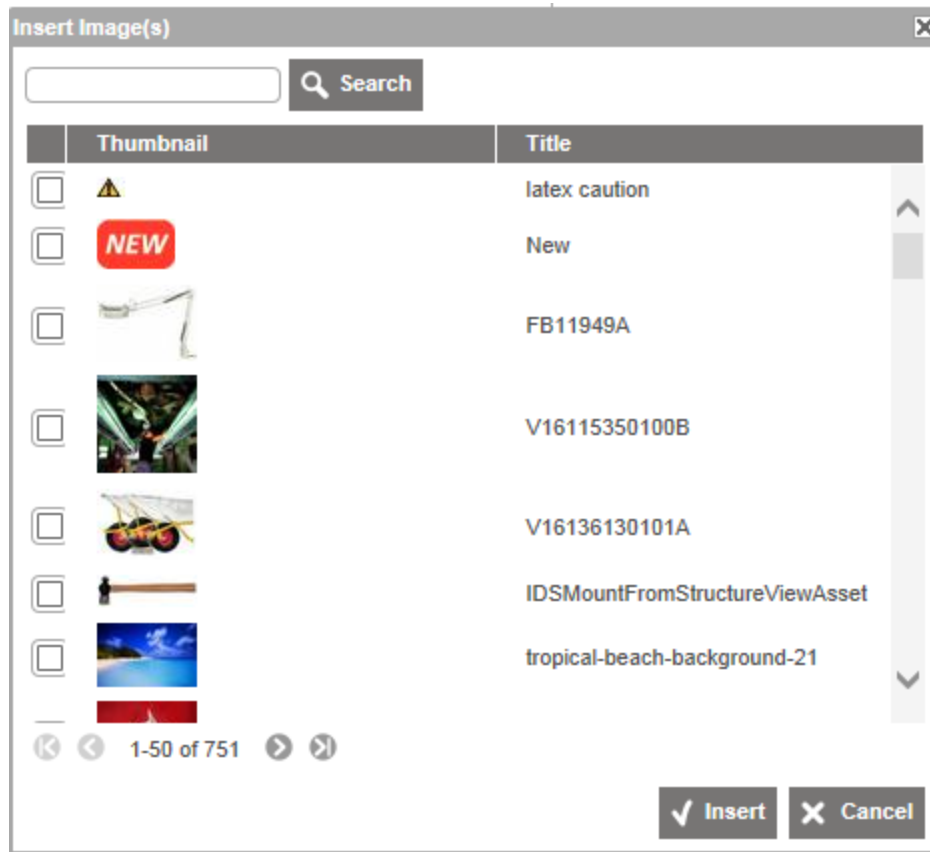
1. Click the green plus icon. A pop up box with two choices appear.
2. Select 'Upload and Insert Image(s)'. A file chooser appears that lets you browse to the image(s) on your hard drive.



3. Browse to the image you want to upload, select it and click the 'Open' button.
4. Repeat step 3 if you want to upload more than one image.
5. Click insert. The select image(s) will now be uploaded from your hard drive to the screen.

### Reference an image from the database

1. Click the green plus icon. A pop up box with two choices appears.
2. Select 'Insert.' A dialog appears showing you the available images in the database.



3. Select one or more images.
4. Click insert. The select image(s) will now be inserted to the screen.
  - To view the image in full size, click the magnifying icon next to the image thumbnail.
  - To delete the image, click the red cross button next to the image thumbnail.
  - To view and edit details on the image click the pen button next to the image thumbnail. This will take you to a separate image screen.

## Buttons

### Save button

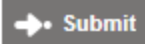
Clicking the  Save button will save the values of the current product to the data base.

In the Initiate screen, it will submit the product into the first state in the workflow.

### Reset button

The  Reset button lets you reload the product values from the server.

## Submit event button

The  button is placed within screens tied to states in a workflow. Clicking the button will save the values of the current product to the data base and move the product to the next state in the workflow.

## Excel Integration

The supplier Web UI enables you to initiate and maintain products or entities in a Smartsheet for Excel. This can be very useful when you have to maintain or initiate many products or entities at a time. You can download multi-level product data to an interactive Excel file, maintain or add new product data in Excel, and then upload the Excel file to the Supplier Web UI again. You can also use the Smartsheet component to initiate multiple new products or entities using a pre-defined template in Excel to set up the products or entities.

## Using Excel Smartsheet

To be able to use Smartsheet, you have to specify the export configurations in the Export Manager, and then associate them with the relevant template widgets and export actions in the Supplier Web UI. From the Export Manager, you can either export data to a Smartsheet or you can export a template that you can use when you want to initiate new products or entities.

For more information, see the **Smartsheet Data and Template Configurations** section of the **Smartsheets** documentation.

For information on how to configure Smartsheets in the Supplier Web UI, see the **Smartsheets in Web UI** section of the **Web User Interfaces** documentation.

## Download a Smartsheet with Data

1. In the workflow widget, click the relevant state. A table containing the products that are currently in the selected state appears.

* ProductGroup Name	Product Group Descrip	* Product Family Name	Product Family Descrip	* Product Family Type	PFT-
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Coding rings	

2. Select the products you want to export to the Smartsheet file.
3. Click the **Download Smartsheet** icon. If more download icons are available, hover the mouse over the icons to locate the appropriate icon.

**Download SmartSheet**

Choose Smartsheet Export Configuration  
Smartsheet Data

Export selected products

Export all products in state Enrich of workflow Onboarding workflow

✓ Start export    ✕ Cancel download

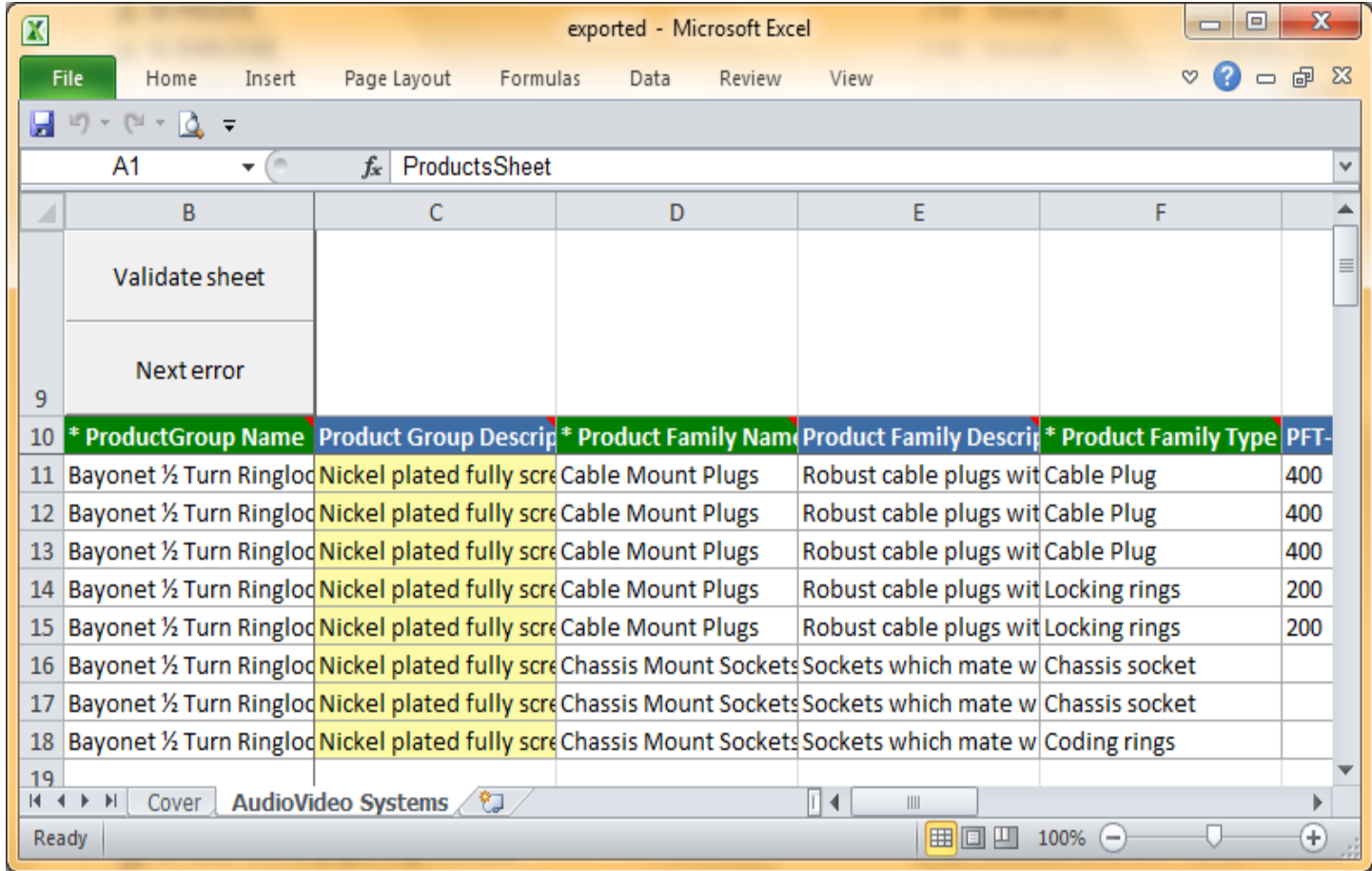
4. In the **Download Smartsheet** dialog, choose the relevant export configuration and then select the relevant products for export.

5. A download job starts, and you are taken to the download job page
6. When the download job is finished, click **Download**, and then save the file to your hard drive.

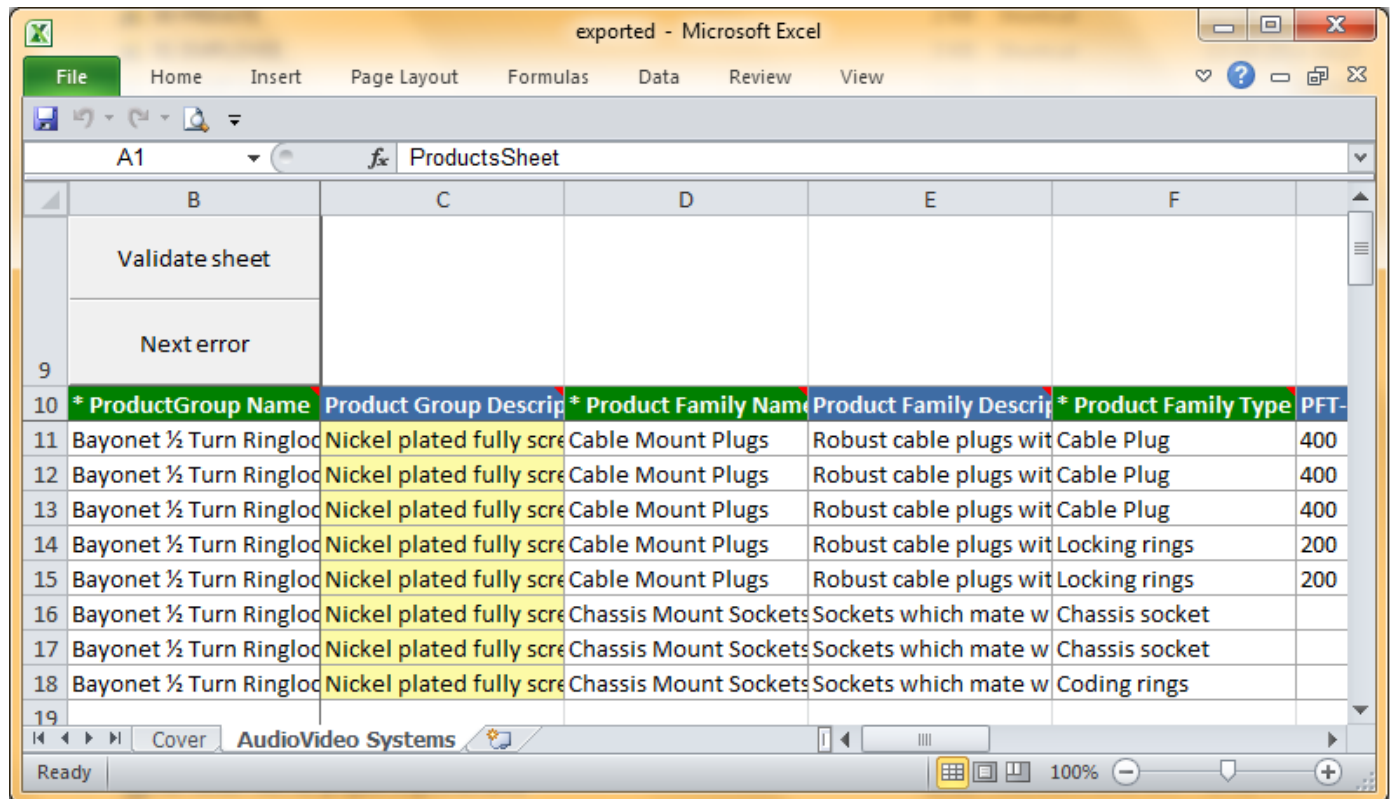
When you have downloaded the file with data, you can start maintaining the data.

**Enter Data in a Smartsheet**

1. In **Excel**, open the Smartsheet that will be edited. The Smartsheet opens on the **Cover** tab, which contains information about the download date and the color codes used in the Smartsheet. A **Security Warning** is displayed saying that macros have been disabled. However, macros must be enabled for the Smartsheet to work properly.



2. Click **Options**, then select **Enable Macros**.
3. On the workbook, click the second tab, which has the name of the node selected during the export process.



	B	C	D	E	F	
	Validate sheet					
9	Next error					
10	* ProductGroup Name	Product Group Descrip	* Product Family Name	Product Family Descrip	* Product Family Type	PFT-
11	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
12	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
13	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
14	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
15	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
16	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
17	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
18	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Coding rings	
19						

4. Enter the product data.
5. Click **Validate sheet** in the top left corner. The **Serverside validation** dialog opens.
6. Select whether changed products only or all products should be validated, then click **Start**.
7. In the **Login** dialog, enter the relevant STEP username and password.

The system validates the changes. The **Serverside Validation** window displays if the validation succeeded or if there are errors that need to be corrected. Errors can be located via **Next Error** to locate and then fix them.

8. Save the file.

**Note:** Some fields, such as node pickers, will prompt the user for a STEP username and password. The system will only prompt for these credentials once.

You can now upload the data to the Supplier Web UI.

## Upload a Smartsheet to the Supplier Web UI

1. On the home page screen, in the **Quick links** widget, click **Upload Smartsheet**.

The screenshot shows a Microsoft Excel spreadsheet titled "exported - Microsoft Excel". The active sheet is "ProductsSheet". The spreadsheet contains a table with the following data:

	B	C	D	E	F	
	Validate sheet					
	Next error					
9						
10	* ProductGroup Name	Product Group Descrip	* Product Family Name	Product Family Descrip	* Product Family Type	PFT-
11	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
12	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
13	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
14	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
15	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
16	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
17	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
18	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Coding rings	
19						

- In the **Smartsheet upload** dialog, click **Browse**, navigate to the relevant Smartsheet file, click **Open**, and then click **OK**.

The screenshot shows a Microsoft Excel spreadsheet titled 'exported - Microsoft Excel'. The active sheet is 'ProductsSheet'. The spreadsheet contains a table with the following data:

	B	C	D	E	F	
9	Validate sheet					
	Next error					
10	* ProductGroup Name	Product Group Descrip	* Product Family Name	Product Family Descrip	* Product Family Type	PFT-
11	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
12	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
13	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Cable Plug	400
14	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
15	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Cable Mount Plugs	Robust cable plugs wit	Locking rings	200
16	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
17	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Chassis socket	
18	Bayonet ½ Turn Ringloc	Nickel plated fully scre	Chassis Mount Sockets	Sockets which mate w	Coding rings	
19						

3. The upload process starts, and the upload process screen displays.
4. When the upload process is completed, the products in the Smartsheet file have been uploaded to the Supplier Web UI, saved, and submitted to the first state in the STEP Workflow.

**Note:** If errors occur during an import, a Smartsheet file with the products that failed from the import process page can be downloaded. The error messages are displayed as screen tips in the Smartsheet file when the pointer is rested on an error cell. **Next Error** can be used to work a set of errors. When the errors have been corrected, the file can be imported again. However, there is limited support for this type of re-import. Some cells will be locked and consequently skipped during import.

## Searching

You can search for products or entities that are currently in a state within the workflow.

1. Go to the 'Search' widget on the home page screen.

### Search

Last search:  
A\*

2. Enter the ID or the Name of the product you want to find. The search result will be displayed on the right hand side:

### Generic Search

Select All
 Clear All Filters
 Add to basket
 Add items to collection
 List view

	Thumbnail	Title	ID	Object Type
<input type="checkbox"/>		<a href="#">Aggregates/Classifications</a>	113291	Aggregate Root
<input type="checkbox"/>		<a href="#">Acme Logo</a>	130309	Logo
<input type="checkbox"/>		<a href="#">Acme Group</a>	141789	Holding Company
<input type="checkbox"/>		<a href="#">Acme Healthcare</a>	141790	Business Unit
<input type="checkbox"/>		<a href="#">Acme Inc.</a>	141791	Business Unit
<input type="checkbox"/>		<a href="#">AttributesExport</a>	553510	Export Manager Configuration

⏪ < 1-50 of 54 > ⏩
Selected items: 0

3. Select a product in the search result list by clicking the workflow in the column to the right. This will take you to the product in its current state.

## Global Navigation Panel

The Global Navigation Panel is a centralized task and navigation hub for the Web UI that is located to the left of the Web UI screen.

Using the Global Navigation Panel, users can do the following:

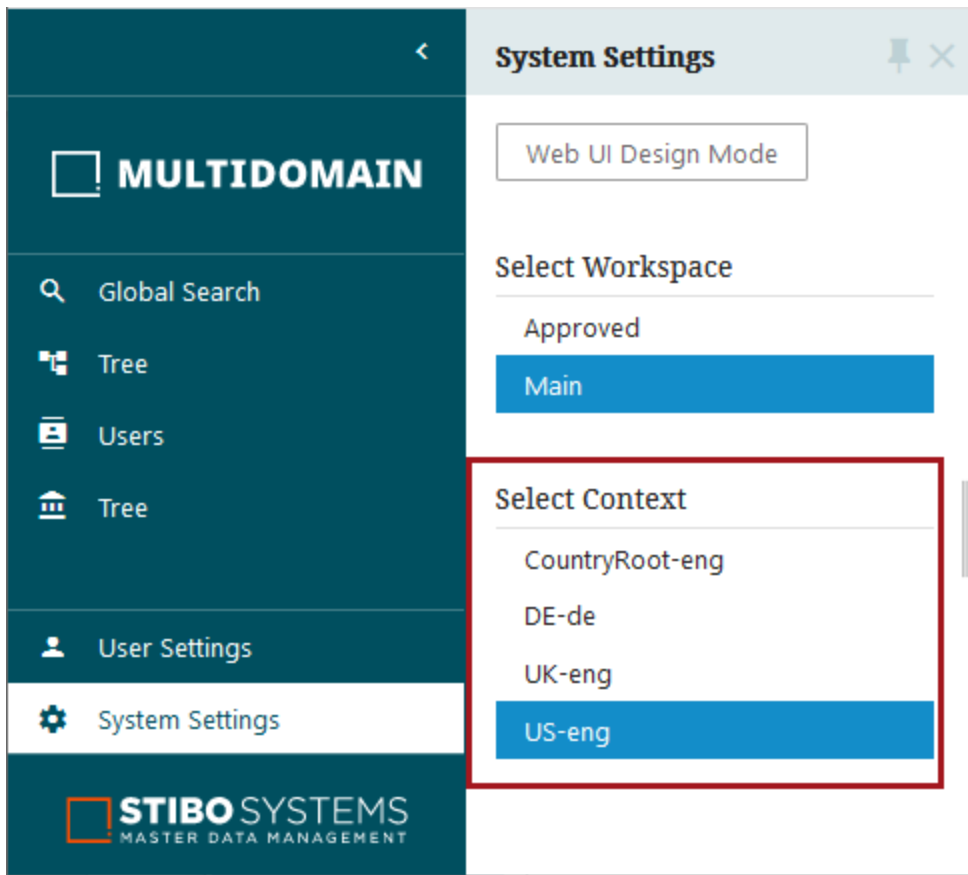
- navigate to any node in the hierarchy
- display workflow states or the tasks within
- access design mode
- log out of the Web UI
- access user information
- select different contexts
- select difference workspaces
- access user impersonation

### Changing context

The current context is displayed in the corner bar.

userj • **US-eng** • Main  

To change the context click System Settings and select a context from the list.

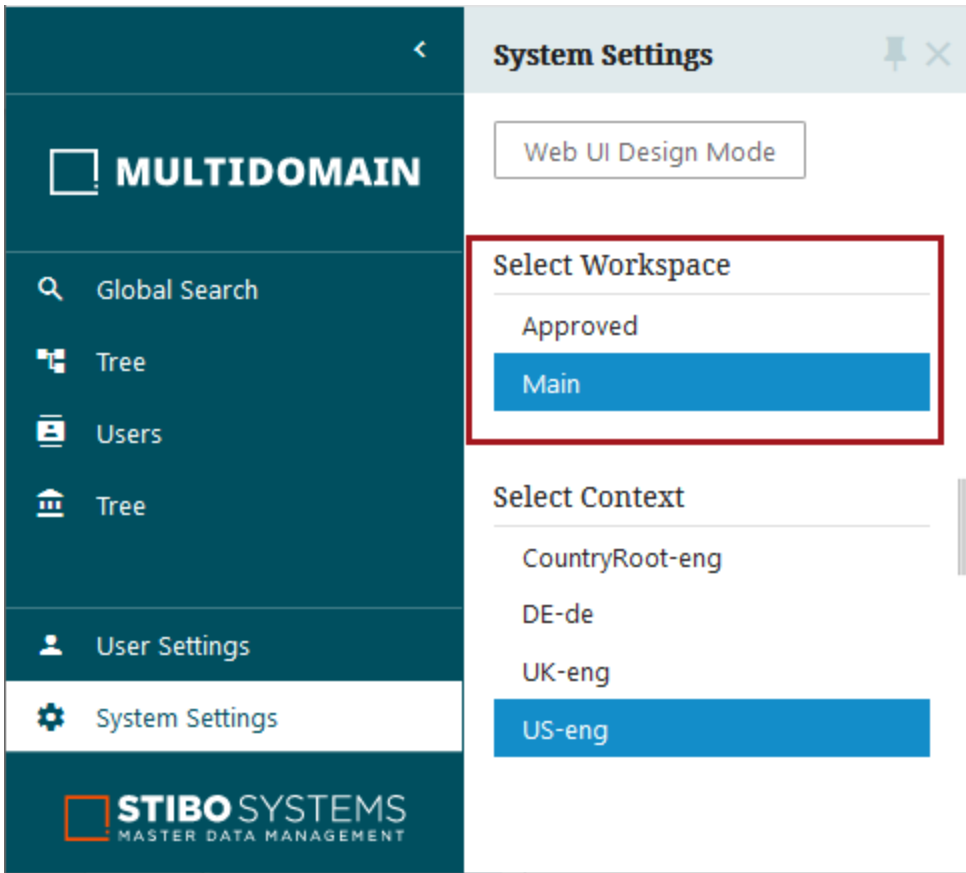


## Changing workspace

The current workspace is displayed in the corner bar.

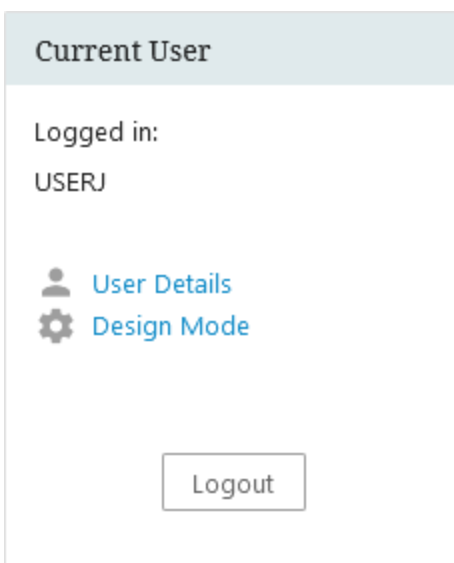
userj • US-eng • **Main**  

To change the workspace click System Settings and select a workspace from the list.

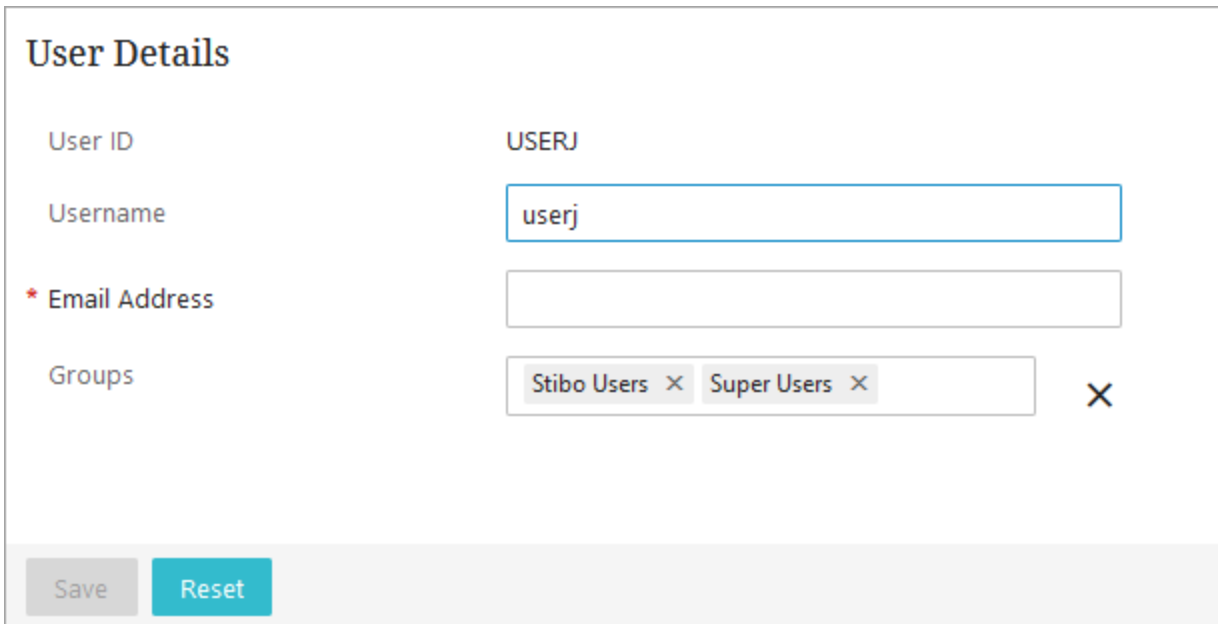


## User Details

The User Details screen allows logged in users to change their username, email, password, and exit permission groups. To access this screen, from the homepage, select 'User Details' on the Current User homepage widget.



Once selected, the User Details screen will load.



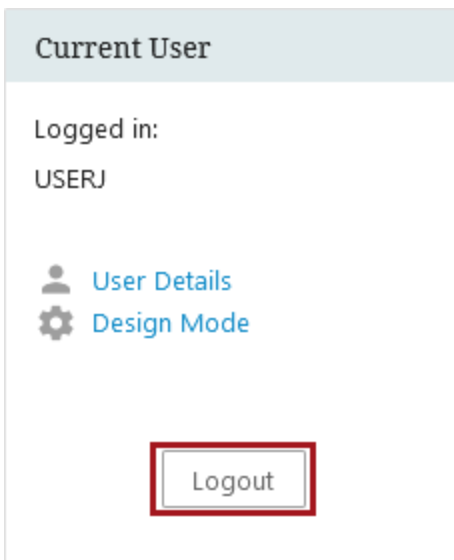
The 'User Details' form contains the following fields and controls:

- User ID:** USERJ
- Username:** userj
- \* Email Address:** (empty text input field)
- Groups:** Stibo Users x Super Users x (with a close button x)
- Buttons:** Save (disabled), Reset (active)

Users may change their user name or e-mail on this page and save the changes. Any changes will require that users also provide an e-mail address.

## Log Out

To log out of the Web UI you must click the 'Logout' button on the Current User widget on the homepage screen.



The 'Current User' widget displays the following information and options:

- Logged in:** USERJ
- User Details:** (with user icon)
- Design Mode:** (with gear icon)
- Logout:** (button highlighted with a red box)

This will log you out and take you back to the login screen.