



# SETUP GUIDE

## Supplier Web UI

Release 2023.3 (11.3) – September 2023

# Table of Contents

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<b>Table of Contents</b> .....	<b>2</b>
<b>Supplier Web UI Setup Guide</b> .....	<b>3</b>
Considerations .....	3
Supplier Web UI Principles .....	3
How it works .....	4
Disable Batches Folder .....	5
Auto-generate the Supplier Classification Structure .....	5
Set the Product to Classification Link Type .....	6
View Across Multiple Suppliers .....	7
Additional All-View Web UI Setup .....	8
Create a Supplier User Group .....	12
Setting Up Smartsheet .....	15

# Supplier Web UI Setup Guide

## Considerations

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

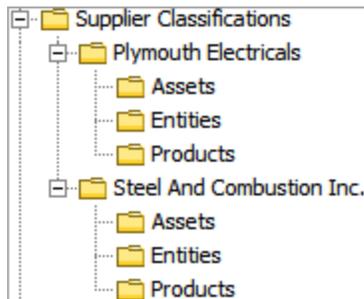
If allowing self service supplier solutions to alter values for Merge Golden Records, be careful to not allow editability of the attributes and reference types that are given special meaning in the Merge Golden Record Component Model.

Similarly, Clerical Review and Unmerge should be run by a user with privileges to access all records and values implicated in the merge. These workflows do not lend themselves towards self service supplier solutions

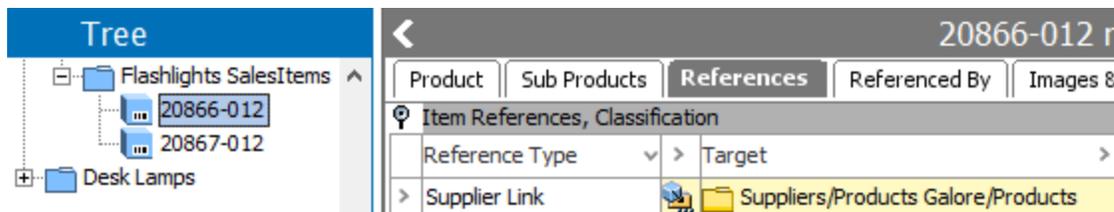
## Supplier Web UI Principles

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

1. A Supplier User Group for each supplier: the individual Supplier Users must be created below a Supplier User Group. When the Supplier User Group is created, the supplier's classification structure is automatically created. This process is defined in the **Creating a Supplier User Group** section below.
2. A Classification structure for each supplier: created automatically when the Supplier User Group is created. The classifications will be used to collect the supplier's assets, entities, and products. Only the corresponding supplier's users can access these objects. The supplier classification structure looks like this:

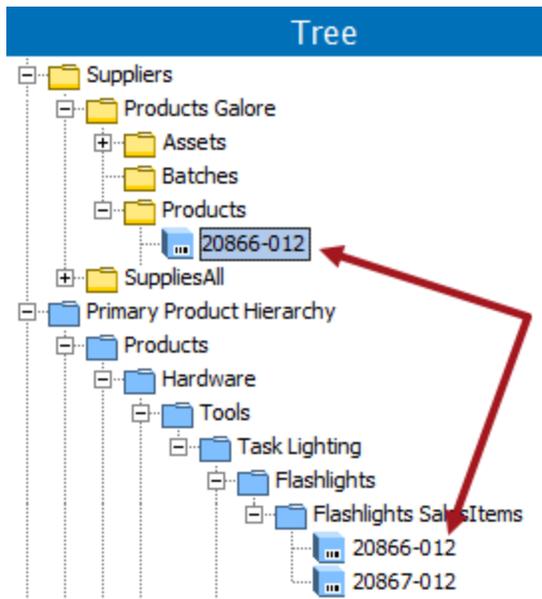


3. A Product to Classification link type: used to link the supplier's products into the supplier's classification structure (i.e., to the products folder and the batch folders).

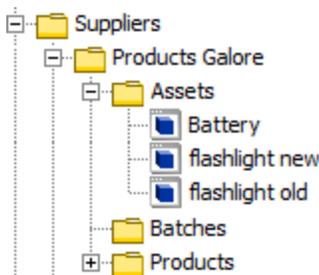


## How it works

For entities and products, when a supplier user creates a new item through the Supplier Web UI, the item will be created in the blue Product Hierarchy or an appropriate Entity Hierarchy and then linked to the supplier's classification structure. For example, the following product is created in the PPH and then linked to a classification



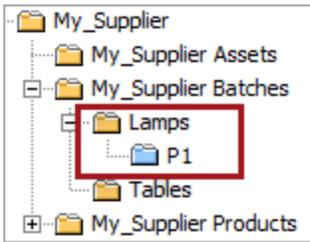
When a supplier user uploads a new asset through the Supplier Web UI, the asset will be placed in the supplier's classification structure (the Asset folder):



When a supplier user creates a new batch through the Supplier Web UI, a classification folder will be created, representing the new batch. These batch folders will be placed below the supplier's Batches folder:



When a supplier user adds an item to a batch through the Supplier Web UI, the item will be linked to the corresponding batch classification folder:



## Disable Batches Folder

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

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

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

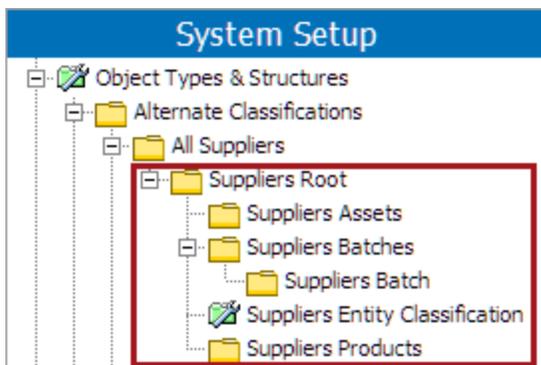
## Auto-generate the Supplier Classification Structure

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

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

Name	Value
Control override meta attribute	
Default context	Context1
Default workspace	Main
Web UI supplier classification object type	SuppliersRoot
Web UI supplier products classification object type	SuppliersProducts
Assets classification object type	SuppliersAssets
Batches classification object type	SuppliersBatches
Batch classification object type	SuppliersBatch
Excel-template asset	QuickSheetTemplate

The standard classification object types used for this are these:



## Set the Product to Classification Link Type

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

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

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

## View Across Multiple Suppliers

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

System Settings	
System Settings	
Log	
Web UI Settings	
Name	Value
> Default context	Context1
> Default workspace	Main
> Web UI supplier classification object type	SuppliersRoot
> Web UI supplier products classification object type	SuppliersProducts
> Assets classification object type	SuppliersAssets
> Batches classification object type	SuppliersBatches
> Batch classification object type	SuppliersBatch
> Supplier privileges entity to classification reference type	SupplierPrivileges
> Web UI supplier entity classification object type	SupplierEntityClassification
> Step-users Web UI batches folder	SuppliersBatches
> Step-users Web UI assets folder	SuppliersAssets
> Link type for vendor classification to product link	SupplierLink
> Enable all-view for users that are a member of multiple suppliers	Y

## Additional All-View Web UI Setup

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

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

## Supplier Field

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

### Create Item

Basic Information ⚠

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Name

Parent Node\*

**Supplier**

Initiate Item Save Close New... Delete Rename Save

### Node Editor Properties [go to parent](#)

Component Description The Node Editor can be configured with a range of components for displaying different information and details about a selected object.

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### Child Components

Rows	Name Value (Name)
	Parent Selector
	Supplier Field

Add.. Remove Up Down

## Supplier Product Assets

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

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

### Product Details

ID: 20859

Name: Flashlights Items

Primary Product Image +

Category Specific Attributes

Save
Reset
Create Product

Product Details
Save
Close
New...
Delete
Rename
Save

### Node Editor Properties [go to parent](#)

Component Description: The Node Editor can be configured with a range of components for displaying different information and details about a selected object.

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### Child Components

Rows

Id Value (ID)  
 Name Value (Name)  
Supplier Product Assets  
 Attribute Value Group Componen

Add..
Remove
Up
Down

## Create Supplier Product Action

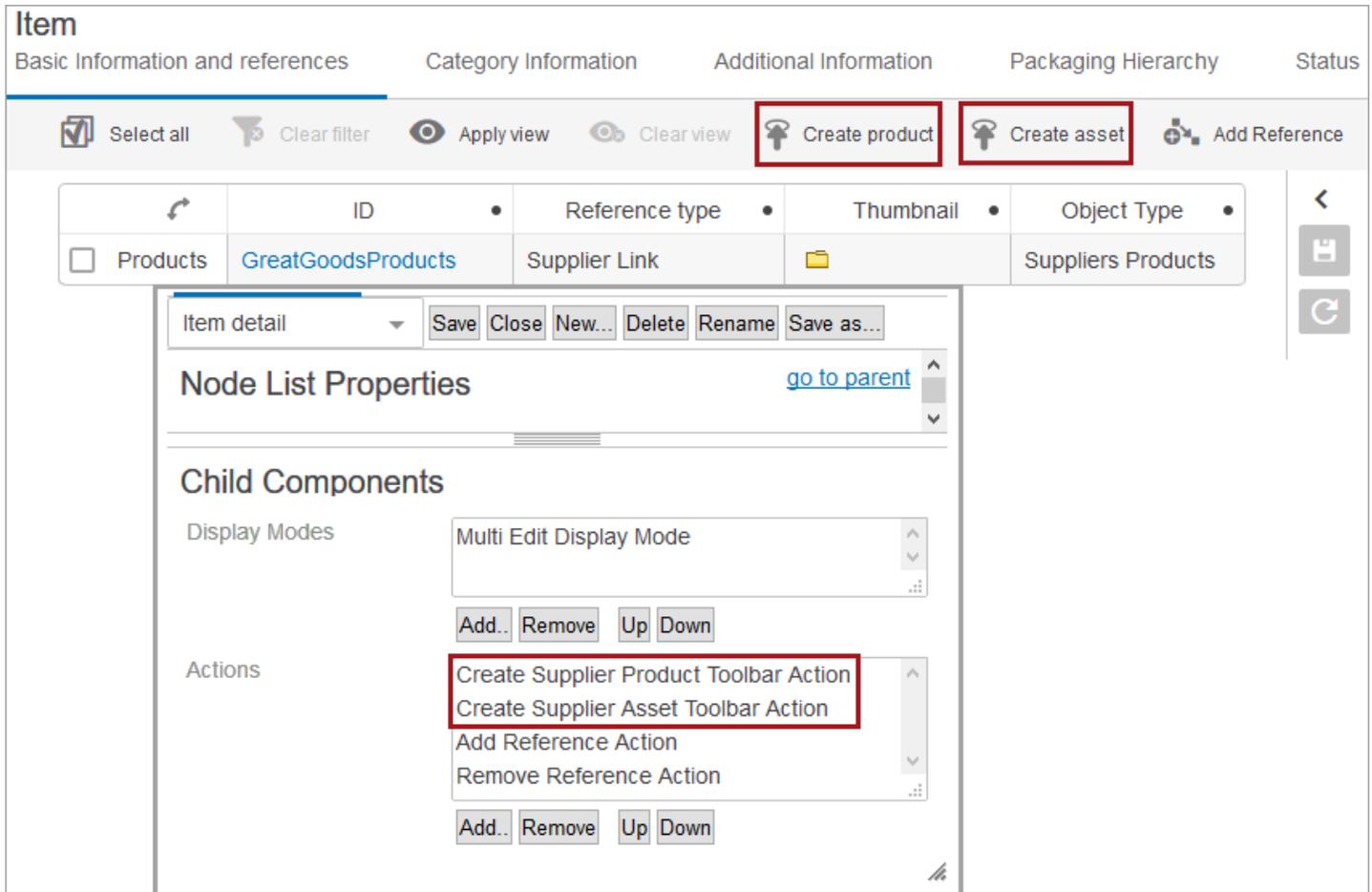
To be able to create new products for a specific supplier while in the blue product hierarchy, the Create Product Action must be replaced with the Create Supplier Product Action to support all-view across multiple suppliers functionality.

The screenshot displays the 'Product Details' configuration page. On the left, the 'Product Details' panel shows fields for ID (20859), Name (Flashlights Item), Category Specific Attributes, Is New?, and Primary Color. Below these fields is a toolbar with 'Save', 'Reset', and 'Create Product' buttons. The 'Create Product' button is highlighted with a red box. On the right, the 'Properties (edited)' panel is open, showing 'Configuration' and 'Web UI style' tabs. Below the tabs is a dropdown menu set to 'Product Details' and buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save'. The 'Buttons Properties' section contains a 'Component Description' field with the text 'Contains a number of buttons to display'. Below this is the 'Child Components' section, which has an 'Actions' list. The list contains 'Save Action', 'Reset Action', and 'Create Supplier Product Action', with the latter highlighted by a red box. At the bottom of the 'Child Components' section are 'Add..', 'Remove', 'Up', and 'Down' buttons.

## Create Supplier Product Toolbar Action and Create Supplier Asset Toolbar Action

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

- The 'Create Supplier Product Toolbar Action' option creates products in the blue product hierarchy.
- The 'Create Supplier Asset Toolbar Action' option applies assets to products in the blue product hierarchy.



## Create a Supplier User Group

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

**Note:** In a workflow, supplier users can only view 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, refer to the **Moving Tasks through a Workflow in Web UI** topic in **Web User Interfaces** documentation or the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** documentation.

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

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

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

**Create Supplier** [X]

**Steps**

1. Supplier User Group
2. Supplier Location
- 3. Classifications**

**Classifications**

Enter the IDs and names for the supplier classifications.

Root ID: SuppliersRoot

Root Name: SuppliersRoot

Products ID: SuppliersProducts

Products Name: SuppliersProducts

Assets ID: SuppliersAssets

Assets Name: SuppliersAssets

Batches ID: SuppliersBatches

Batches Name: SuppliersBatches

[Back] [Next] **[Finish]** [Cancel]

6. Click the **Finish** button. The Supplier User Group is now created and the supplier's classification structure is also created. Users must be added to the supplier user group to enable the supplier functionality.
7. In System Setup, click the new supplier user group to display the editor.
8. On the Group tab, Users flipper, click the **Add User to Group** link and select the necessary users.

**Suppliers - Group** [Navigation Icons]

Group | Privilege Rules | GUI Set-Up | Log

Description

**Users**

Name | Group Information | User Information

**Add User to Group**

Supplier

**Select User** [X]

Browse | Search

- Suppliers
  - Great Goods
    - Great Goods user
    - supplier 1**
    - supplier 2
  - Products Galore

Details

**Select** [Cancel]

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

## Setting Up Smartsheet

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