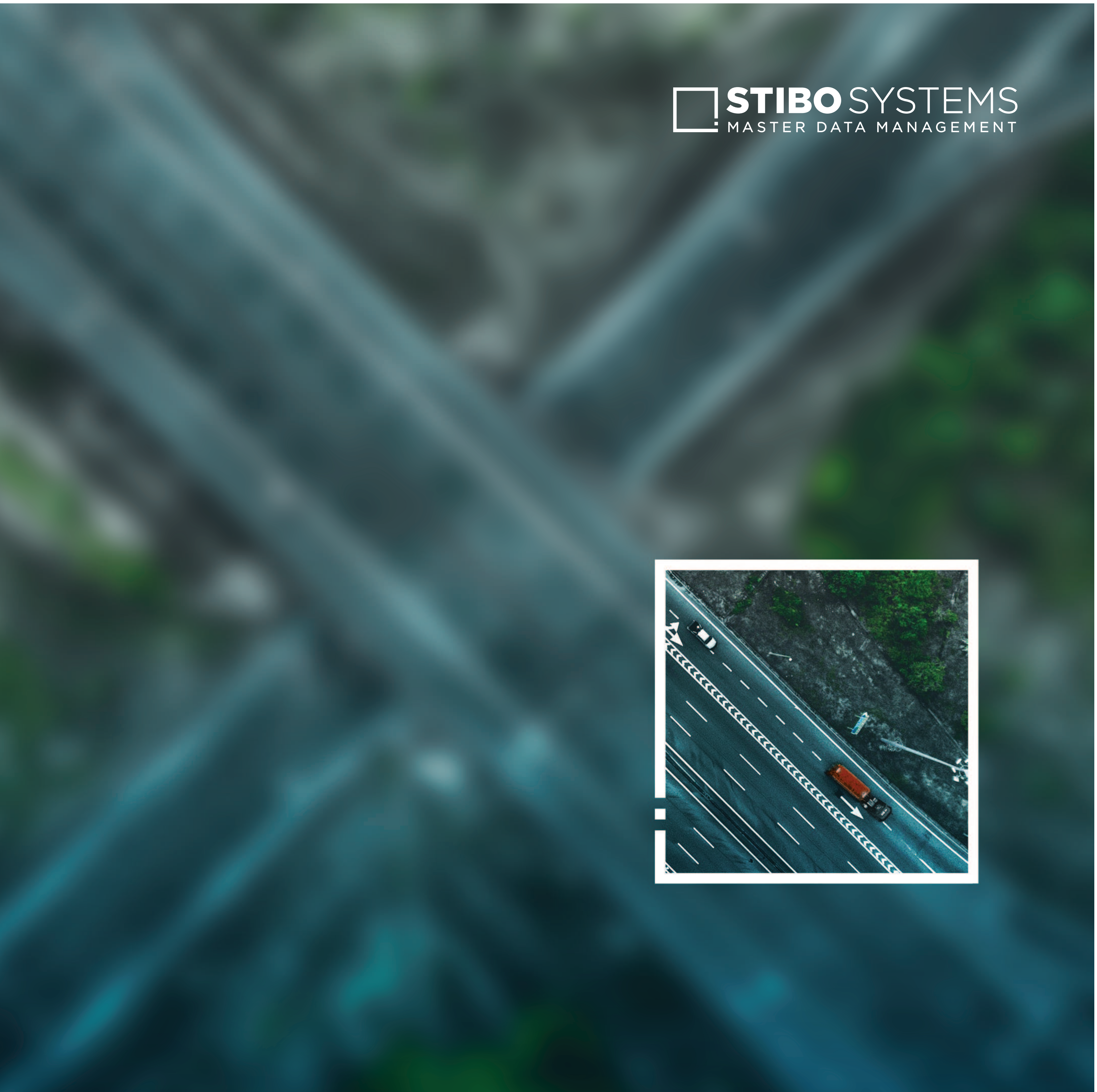

USER GUIDE

Instrument User Interface

2025.2 – June 2025

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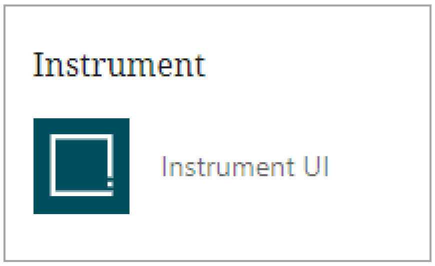
Instrument User Interface

The Stibo Systems new UI for STEP (also referred to as Instrument) is a powerful data management tool that helps simplify the process of handling complex data challenges. It prioritizes simplicity and transparency, enabling users to address intricate issues seamlessly. The key features of Instrument include a visually streamlined interface with a contextual toolbar that , maintains the context of your data, provides guidance through dynamic error and warning messages, and facilitates easy data organization with work area and perspective concepts. In essence, Instrument is designed to empower users to master their data efficiently and with minimal friction.

Instrument can be accessed via your system's Start Page. You can also go directly to Instrument using this URL: [your system URL]/instrument



While Instrument is generally available, it still must be enabled for your system. Additionally, these prerequisites must be met before you can activate the Instrument UI:

- Be on the most recent STEP version. Going forward, update to the latest version when available. Instrument updates will not be backported.
- Have the Elasticsearch license and Elasticsearch server configuration setup. For more information, go to the Elasticsearch Setup in the System Setup documentation.
- Have the In-Memory license and setup. For more information, refer to In-Memory Database Component for STEP in the Resource Materials documentation.

Contact Stibo Systems to determine how best to meet these requirements and get started.

The Instrument section of documentation is split up into the following categories:

- **Getting started**: This section provides an Instrument introduction around logging in and using work areas and perspectives.
- **Using Instrument**: This section covers the specifics of using work areas and perspectives along with the different tools available in Instrument.
- **Administration**: This section goes over administration-specific tasks that can be done to fully enable Instrument functionality.

Getting Started with Instrument

Instrument is a powerful tool that provides a new and innovative way to master your data. To accomplish this, it has been designed with a focus on simplicity and transparency; empowering users to solve complex issues with as little friction as possible.

In a nutshell, the goal of Instrument is to do the following:

- Simplify complexity by providing a consistent interface with a contextual toolbar
- Maintain the context of the data you are working with so that you can return to where you started
- Provide guidance for solving issues through the use of dynamic errors and warnings
- Make it easy to organize your data via the work area and perspective concepts
- Offer various accessibility options for anyone who needs them

Prerequisites

What are the steps to try out Instrument?

There are a few requirements needed before you can activate the Instrument UI:

- Be on the most recent STEP version. Going forward, update to the latest version when available. Instrument updates will not be backported.
- Have the Elasticsearch license and Elasticsearch server configuration setup.
- Have the In-Memory license and setup.

Contact Stibo Systems to determine how best to meet these requirements and get started.

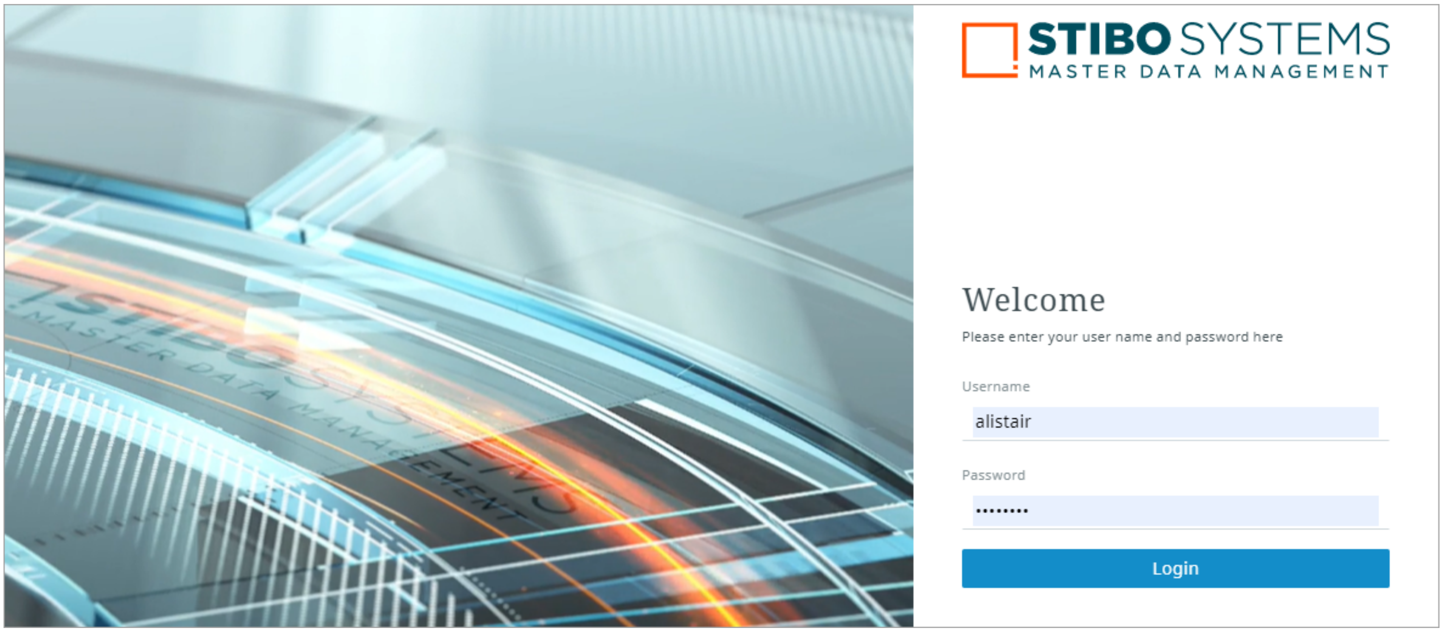
Additionally, some system administration setup is required before using Instrument. Administrators should refer to the Administration section.

Accessing Instrument

The Instrument user interface (UI) is accessible via your system's Start Page or by appending your system URL with "instrument."

For example, *https://[system name]/instrument*.

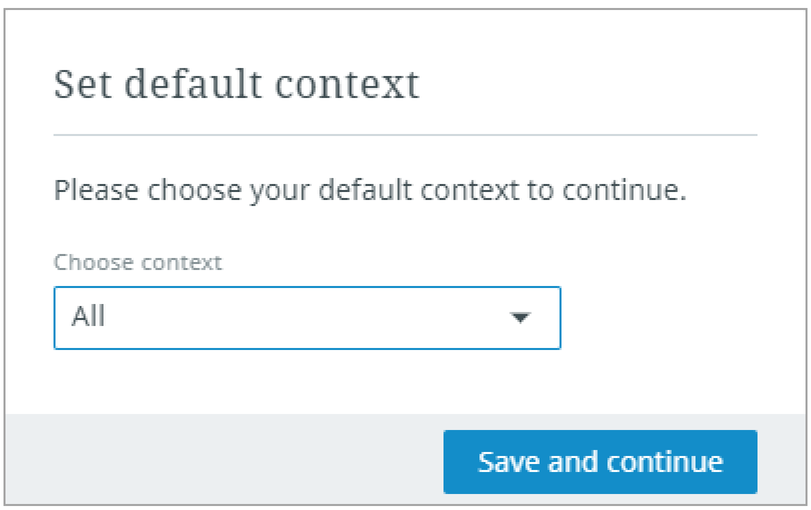
To log in, you simply enter your STEP credentials (username and password).



Context

When you first log in, you will select a default context. Contexts are explained within the Contexts topic in the System Setup documentation.

If the admin user has set the default context via the Configuration tool, then you will not need to choose a context. Once you are logged in, you will still be able to change your context while in the User Settings.



Locale

The locale, or the language in which this UI will display static text strings (i.e., titles, labels, and dialog text) and other settings like delimiters and date formats, is determined / modified through the settings menu of your browser. The following locales are supported:

- Chinese (simplified)
- Danish
- English
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese
- Spanish
- Swedish

Instrument Concepts

This tool allows you to organize your data into groups and then work with those groups via tab groups. This gives you the ease of editing and managing your data in a way that makes sense to you.

This is accomplished through the use of work areas and perspectives:

Work areas are methods of viewing and working with your data in a format you customize.

If this is your first time logging into Instrument, a default work area with a Tasks perspective will display.

You can customize the work area name, description, and background image. If you find that your work requires more than one work area, you can add as many as you need, giving each work area its own unique title, image, color, and description to differentiate them and make them easily recognizable.

> **Important:** *Prerequisite–Verify, or have a system administrator verify, a classification folder for work area images has been set up in STEP. For more information, refer to the Administration section.*

Perspectives provide a customized look into your data and exist as tabs that reside within a work area. There are three types of perspectives you can add to your work area: tasks, browse, and collections.

Within a perspective, you can view your data in a list view or a details view. The list view provides a high-level view of all nodes, while the details view focuses on the data specific to a selected node.

A contextual toolbar is accessible whenever you are viewing a perspective. Any actions not relevant to the view you are in will be automatically hidden from the toolbar.

> **Important:** *Prerequisite–Verify, or have a system administrator verify, that business actions have been set up for you to view and use in Instrument. By default, no business actions are shown without this setup. More information for your system administrator is in the Administration section.*

Functionality for Work areas is covered in Using Instrument documentation. Refer to the Perspectives topic for a more in-depth look at perspective features and functions.

Working With Your Data

While Instrument gives you many methods for customizing the display of your data, it also offers several ways to action it. You can accomplish many simple data maintenance tasks from the perspective list view, or you can get a more detailed view of the data by toggling to details view.

From the list view, you can edit attribute data cell by cell if needed, or you can edit in bulk. If in details view, the details pane shows all available attributes for a selected product, allowing you to edit attributes and to quickly navigate between attribute groups.

For more information, go to the Using Instrument topic Managing data.

Instrument Documentation

To easily find information within the documentation, you can use the search bar at the top of each page. Search by keywords or phrases. Exact phrases can be searched by putting quotation marks around your search terms.

Once you are familiar with the Instrument concepts or if you just want to jump into using the interface, the Using Instrument section covers how you work with work areas, perspectives, etc. And, while there is no administration needed to get started, the Administration section covers a few areas that are important for system administrators.

Using Instrument

Instrument is a dynamic interface that empowers you with easy-to-use tools for managing data. The UI's simple and intuitive design not only allows for streamlined execution of your day-to-day tasks, but also enables you to organize your data in a way that best serves your daily needs. The goal with Instrument is to make otherwise complex daily tasks as painless as possible.

The interface can be distilled into two distinct elements:

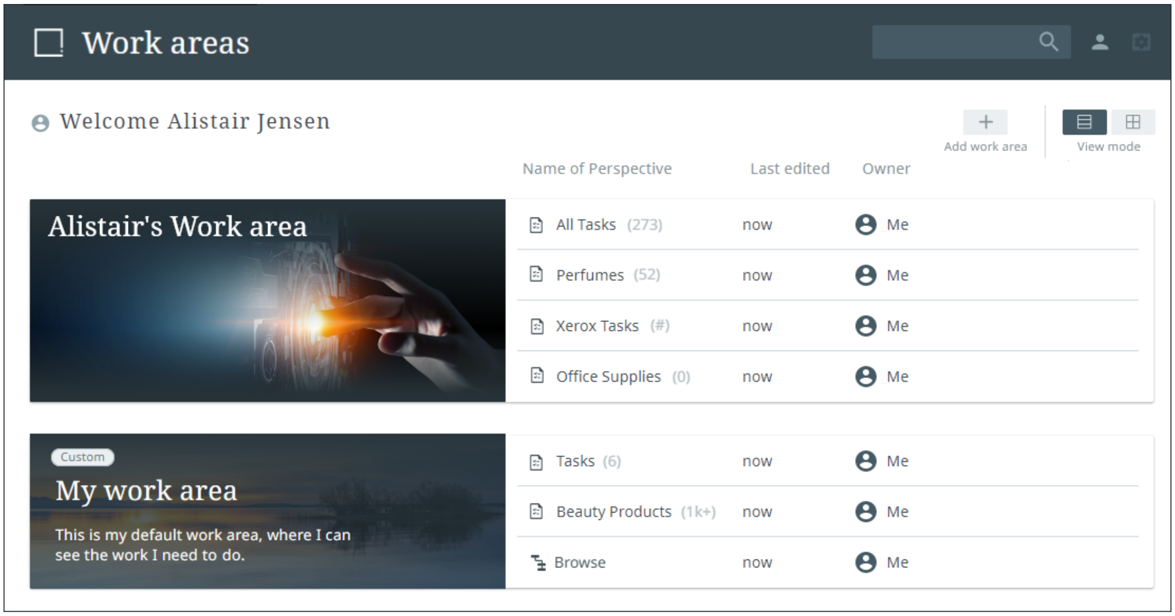
- Workspaces
- Perspectives

Other features of Instrument described in this documentation:

- Search bar, described in the Utilities topic
- Data containers
- An Item picker

Work Areas

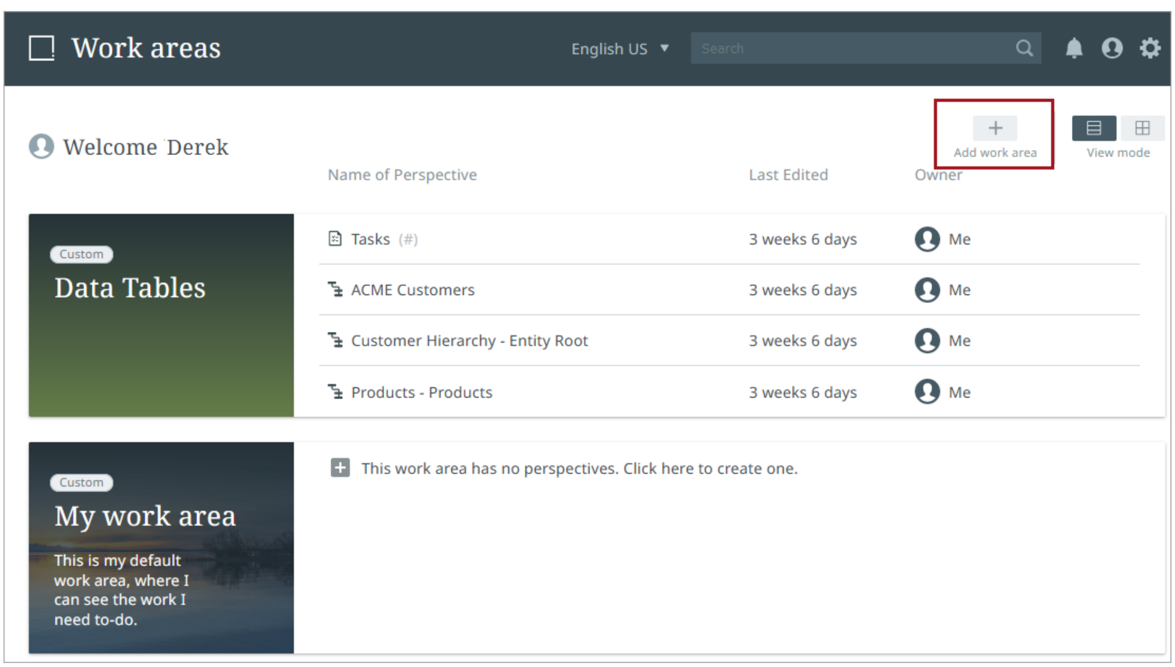
Work areas are the foundation of the interface, determining what data is displayed and how it is organized. They serve as shared containers for related perspectives, and allow you to group and organize your perspectives according to how you work. Pictured below is the work area screen, which is what displays when you first log in.



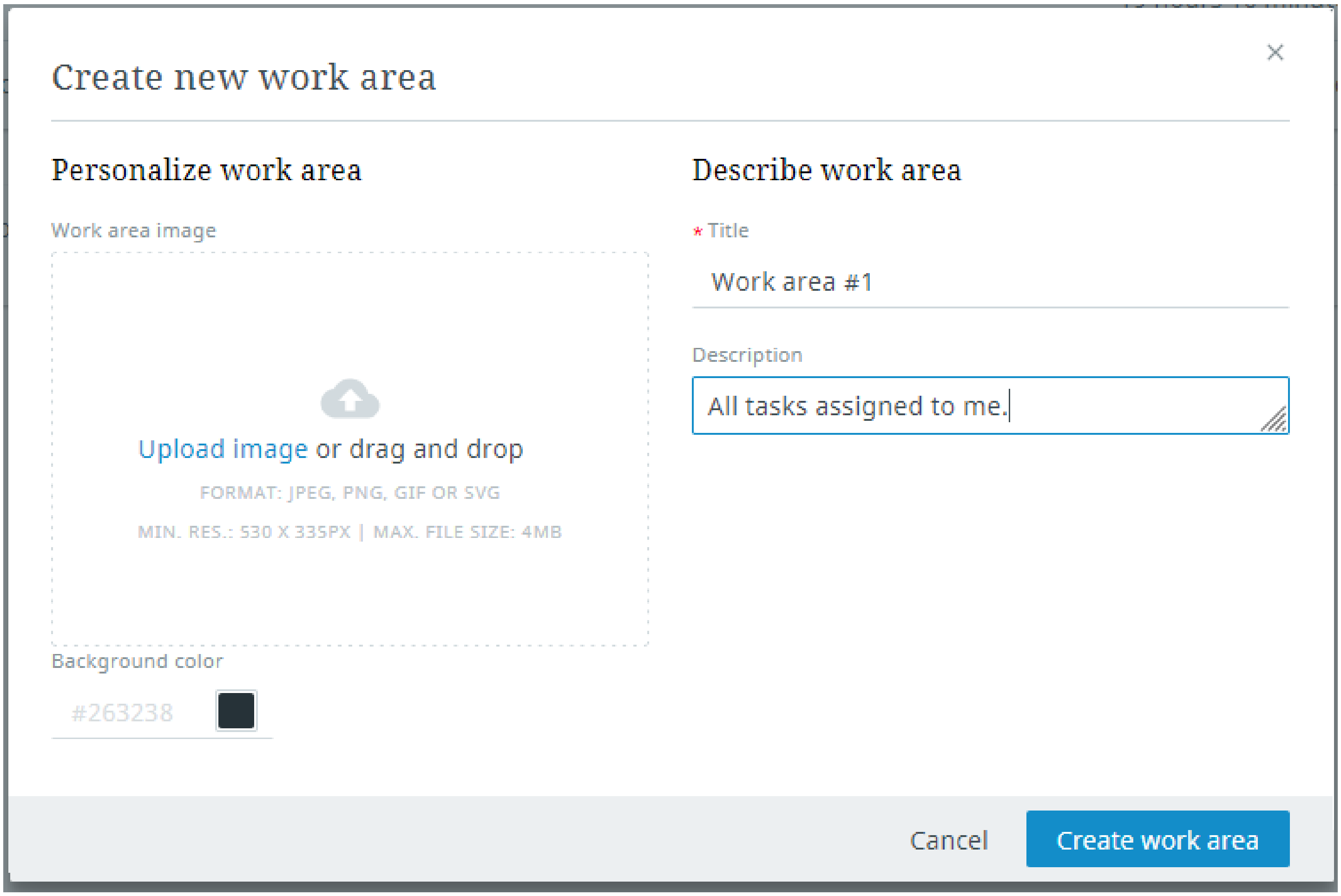
As shown in the examples above, you can easily identify how many tasks you have for each perspective shown based on the number in parentheses to the right of the perspective name.

Adding a New Work Area

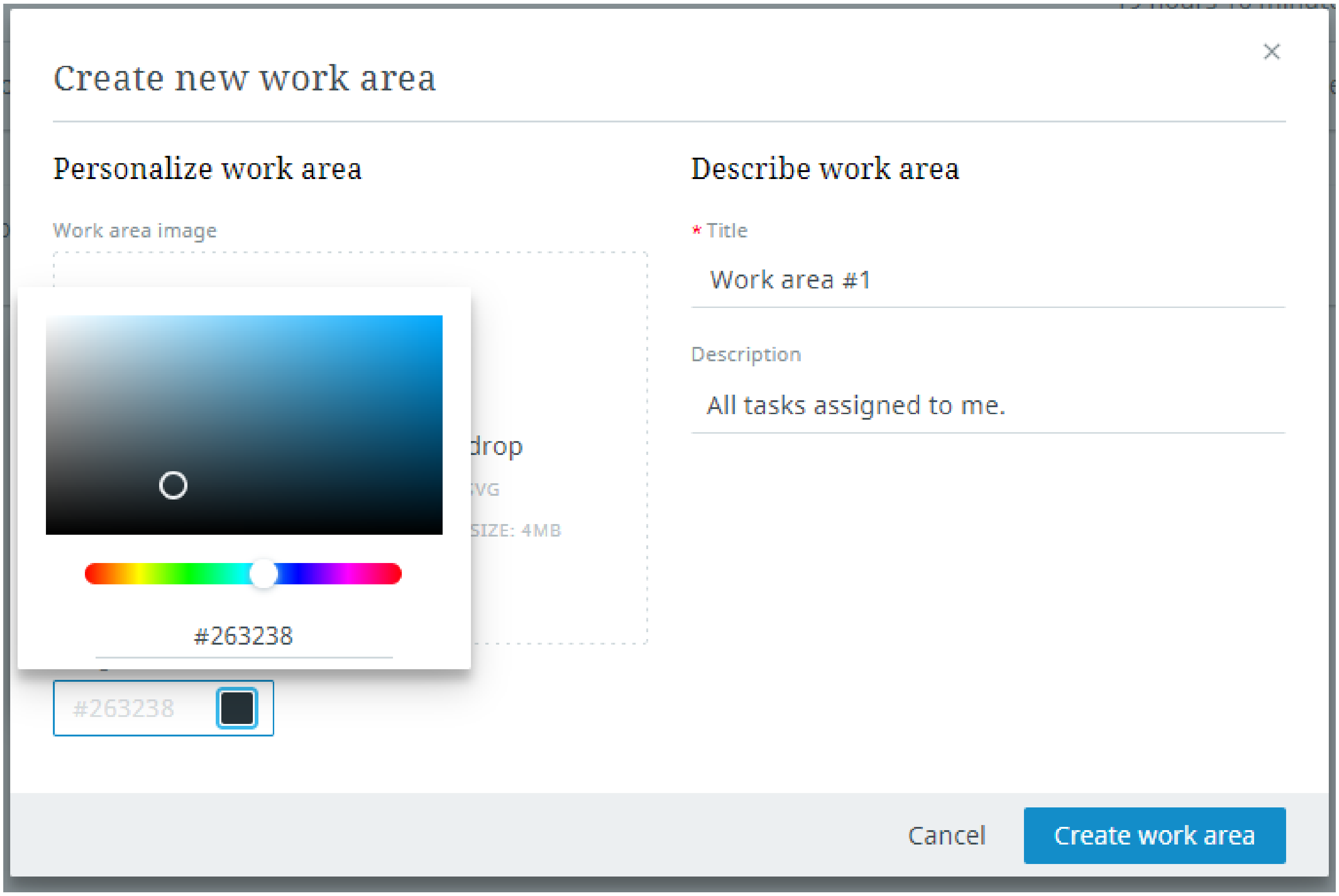
To add a new work area to the work area screen, click the "Add work area" button at the top of the page.



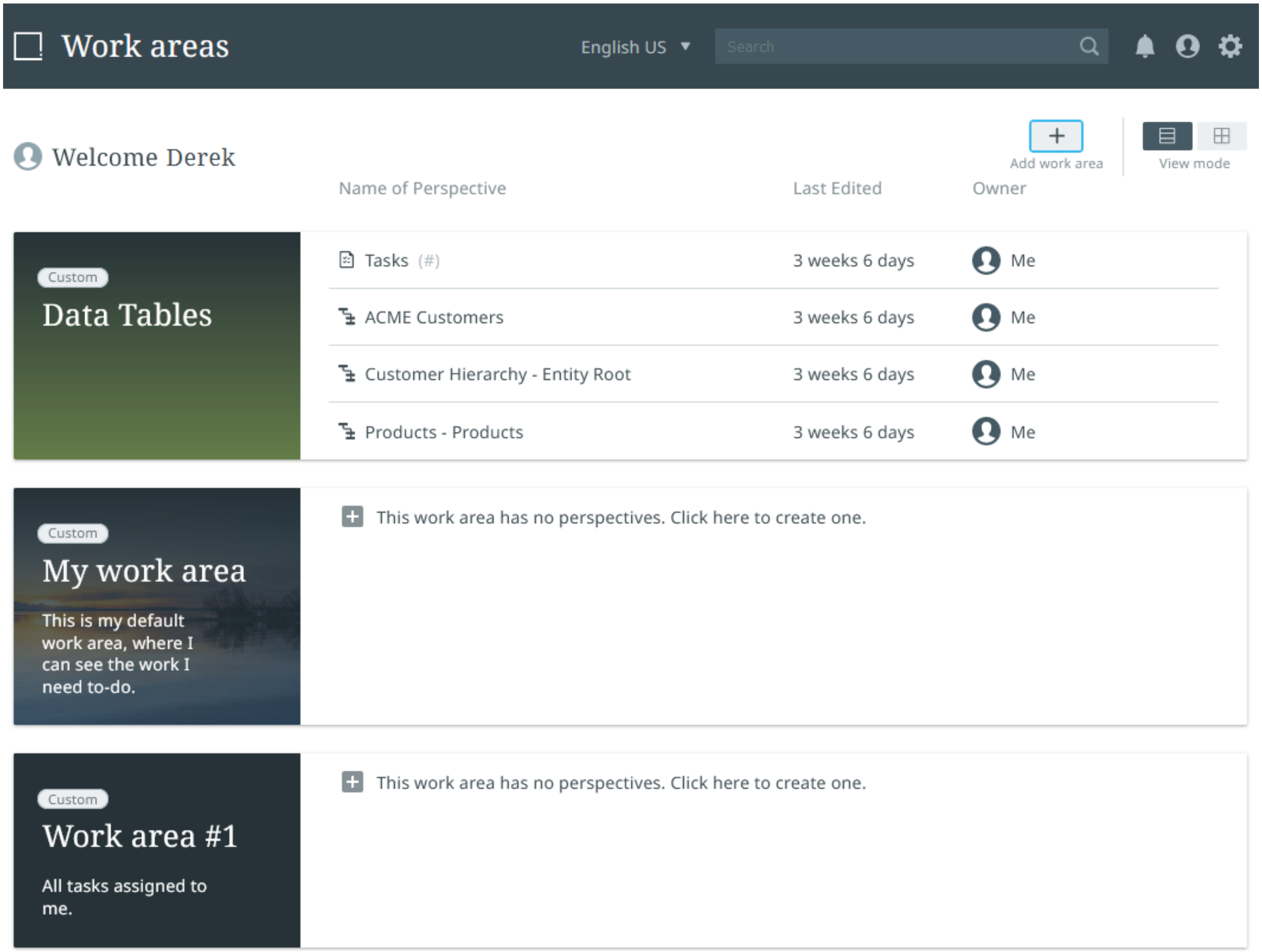
This opens the "Create new work area" editor, as shown in the screenshot below. Using this editor, you can assign a title for the work area, a description of its purpose, and a background color or an image to represent the new work area.



You can specify the background color by manually entering a hexadecimal color code or by picking a color from the palette on the color picker.



Once your new work area has been created, it displays alongside your existing work areas.



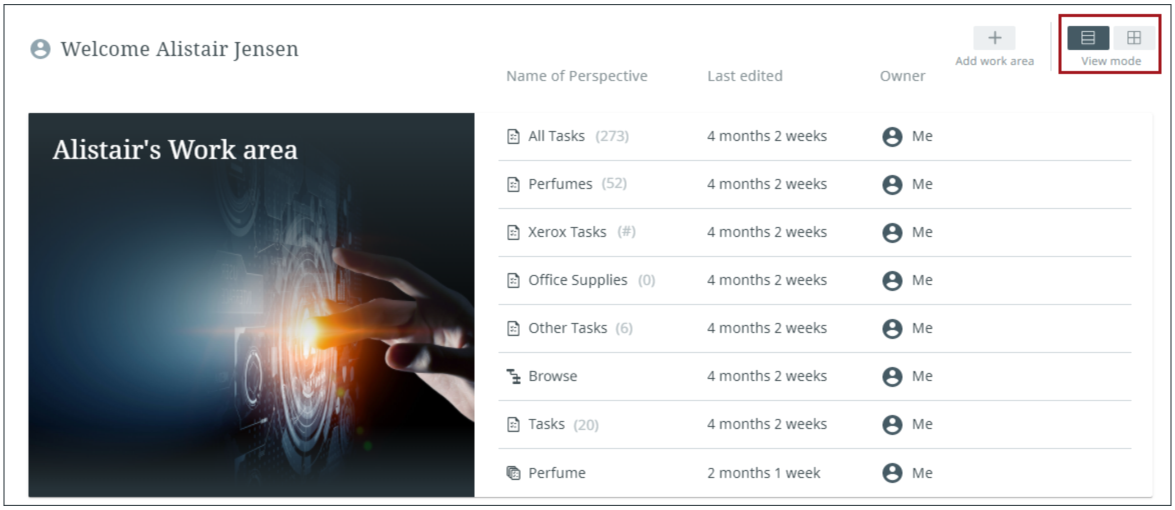
Important: *Prerequisite—To enable the ability to add images for your work areas, verify, or have a system administrator verify, a classification folder for work area images has been set up in STEP. For more information, refer to the Administration section.*

With your work area set up, you may want to add a perspective to your work area. For more on this, go to the Adding a New Perspective section of the Perspective Basics topic.

Preset work area and perspective configurations set by admin users become the default settings for assigned user groups. Columns and filters set by admins display to users. Admin defined filters cannot be deleted or overwritten by users once set. A tooltip message displays stating, "You cannot overwrite admin configurations." However, custom settings such as zoom, additional filters, and column width can still be manipulated and maintained by users in preset perspectives. Upon saving these changes, the 'Reset to default' feature is enabled which allows users to revert to default settings defined by admins. Preset work areas can be duplicated and further customized by users in the duplication. Custom work areas, identified by a "Custom" label above the work area name, are configured by the user and are customized based on user preferences and privileges.

Work Area Views

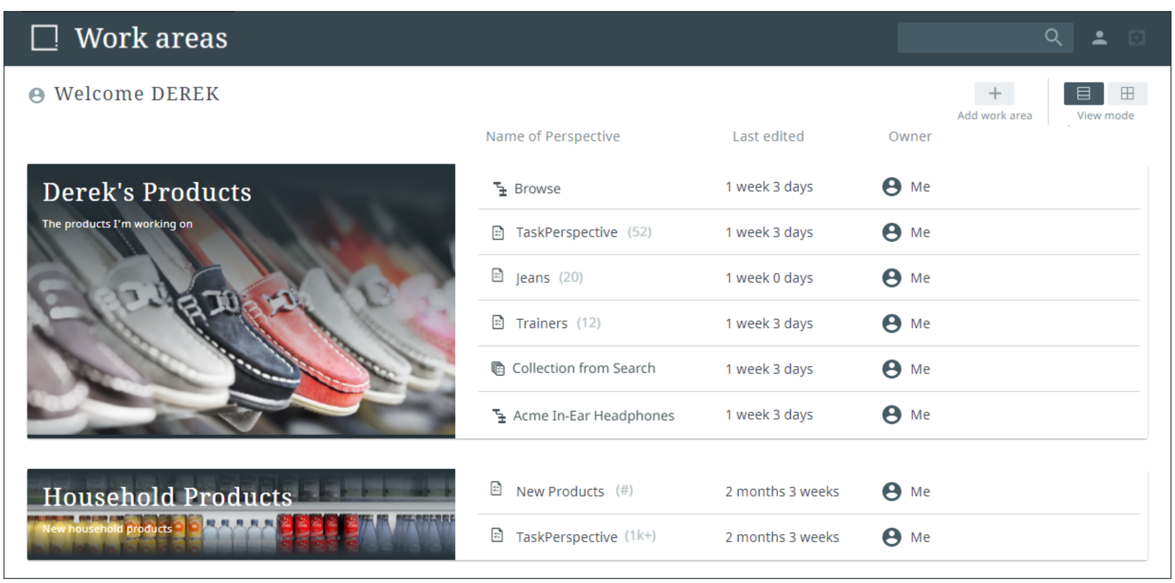
Your work areas can be displayed on the work area screen in two different ways, depending on which view is selected: list or gallery. The view buttons are located in the upper right-hand corner of the work areas screen. To change the view, click the view button for the view style not currently displayed. The list button is on the left and the gallery button is on the right.



List View

The list view provides a detailed overview for each work area. These details include:

- a list of the perspectives included within it and their respective task counts
- last edit date
- the owner of each perspective

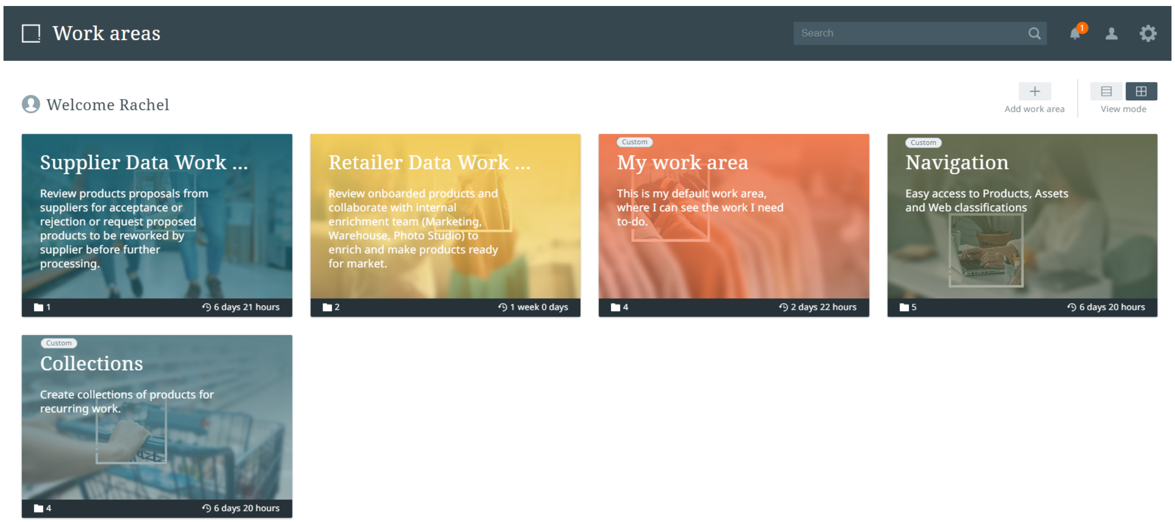


In the List View, you can access the work area by clicking the image. This opens either the most recently accessed perspective or the first perspective tab based on tab ordering. Or you can click directly on the desired perspective to gain access.

Gallery View

The gallery view displays each work area as a clickable card that provides fewer details about the work area than the list view, but displays the selected background image or color more prominently to aid faster identification and access. Gallery view enables users to view more work areas on a single screen and quickly navigate between different work areas. Contained inside each work area card are the following data points:

- name and description
- how many perspectives are held within the work area
- the last edit date for the work area



In the Gallery View mode, the work area can be accessed by clicking the image. This will take you to either the most recently viewed perspective tab or the first perspective tab based on tab ordering.

Customizing the Work Area Screen

The work area screen allows you to organize the work areas and perspectives that you configure in a way that best fits your requirements.

Note: Work areas and perspectives configured by an admin user cannot be reordered by users.

Organize Work Areas

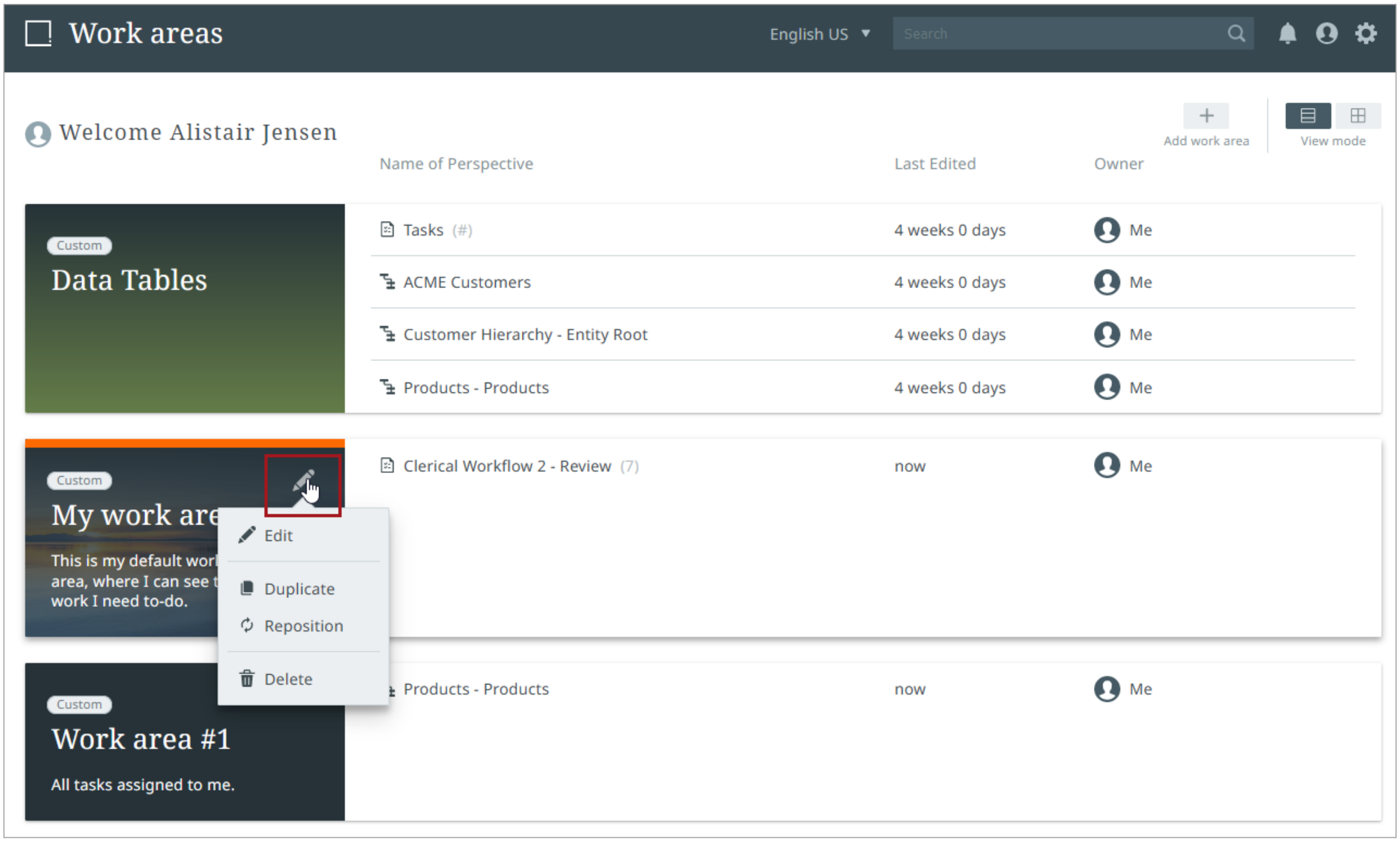
In both the list view and gallery view you can reorder your work areas by dragging and dropping the work area image.

Organize Perspectives

In list view, perspectives can be reordered by clicking and holding the drag handle on the perspective, (found at the far right of the listed perspective), dragging the perspective to the desired position, and then dropping it.

Maintaining Work Areas

To make changes to a work area, hover your cursor over the work area's image and select the pencil icon. This opens a menu allowing you to edit, duplicate, reposition, or delete the work area.



Selecting "Edit" opens the edit work area menu, allowing you to change anything previously set, including the title, description, image, or background color.

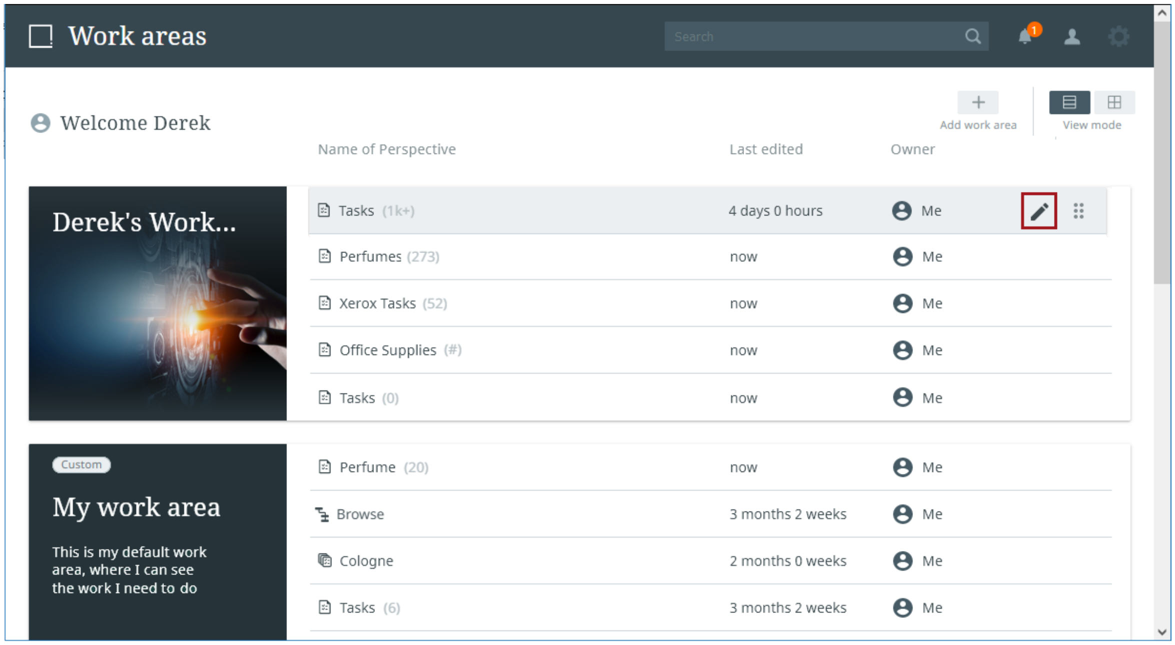
Selecting "Duplicate" creates a copy of the work area.

Selecting "Reposition" allows you to move the work area to a different location on the screen. This can also be accomplished by clicking on the work area image and dragging the work area to your desired location.

Selecting "Delete" allows you to delete a work area, following a prompt to confirm the deletion.

Maintaining Perspectives

Perspectives can be modified from the work areas screen in a number of ways. When in the list view, hover your cursor over the perspective you wish to edit and select the pencil icon.



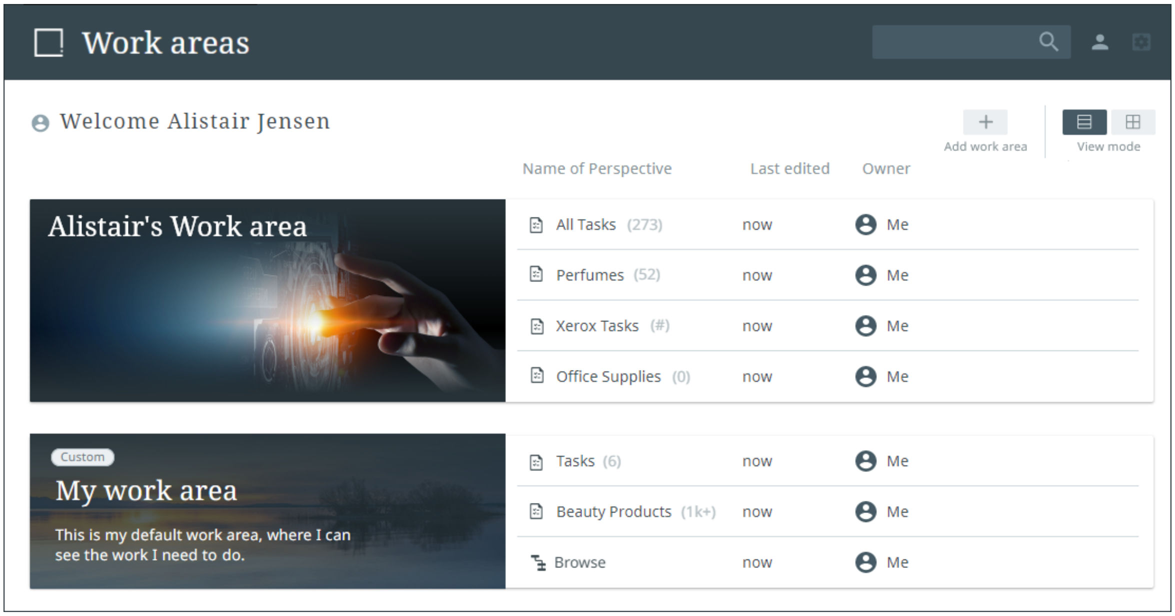
A menu displays that provides the following options:

- Rename - Allows you to rename the perspective
- Duplicate - Creates a duplicate of the selected perspective that can then be edited as needed
- Delete - Prompts display of a confirmation dialog asking you to confirm you want to delete the perspective -- the tasks included in the perspective are not impacted, only the selected perspective is removed
- Copy to - Enables users to create a duplicate of the selected perspective on a different work area
- Move to - Enables users to move the selected perspective to a different work area

You can also move a perspective between different work areas by dragging and dropping it via the drag handle.

Task Counts

Within the work area screen, task counts appear to the right of each Tasks perspective name, as shown below:



Things to know about task counts:

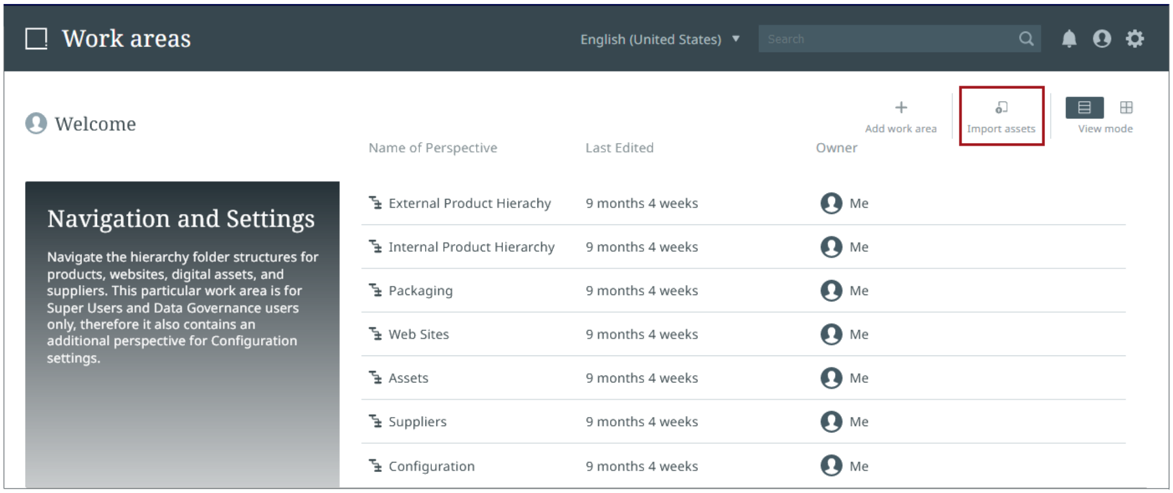
- Task counts load from top to bottom for perspectives as they are visible on the screen.
- (...) indicates that tasks are still being counted and will display when loading is complete.
- (0) indicates that there are no tasks in the perspective.
- 1,000 is the maximum task count. (1k+) indicates that there are over 1,000 tasks in the perspective.
- If the task count cannot be calculated, a (#) will be shown. For example, there may be a combination of filters that limit the system's ability to count tasks fast and efficiently. This would prompt display of a #.
- Mouse over the task count on the screen to get more information about what it means.
- Counts are not shown for Browse and Collection perspectives.

Importing Assets

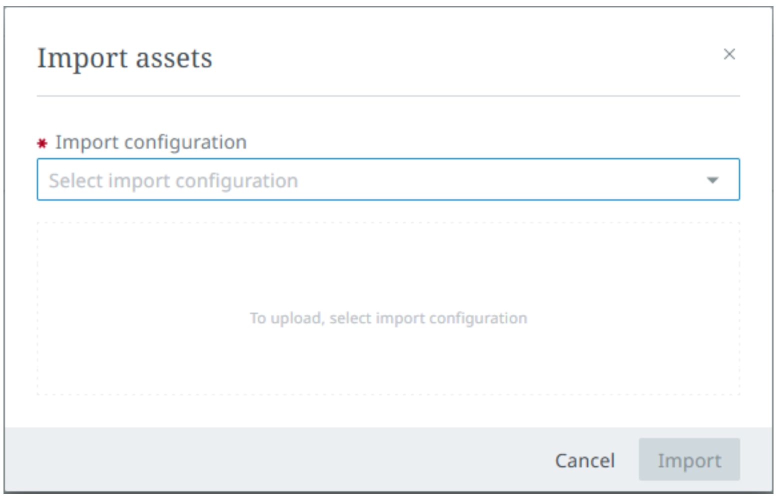
Also available on the work area screen is an "Import assets" button. This feature allows users to mass import assets into STEP via Instrument, independent of any specific product, entity, or perspective. Located to the left of the "View mode" buttons, the "Import assets" button gives you the ability to add an unlimited number of assets that can be linked, categorized, and renamed when it makes sense for your workflow.

To import assets on the Welcome screen using the "Import assets" button, follow the steps described below.

First, click the "Import assets" button.

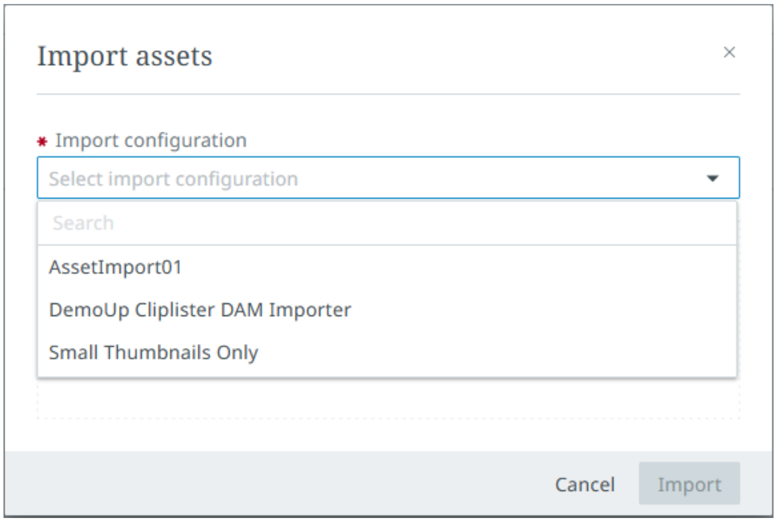


An "Import assets" dialog displays.

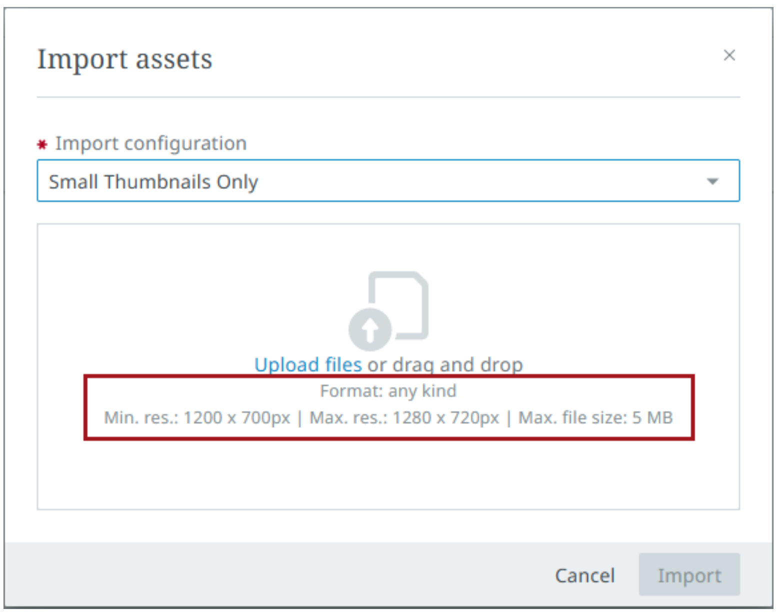


Note: If no asset import configurations have been set up for a given system, the system will display a message to this fact.

From the "Import configuration" field dropdown, select the desired asset import configuration for the assets being imported.



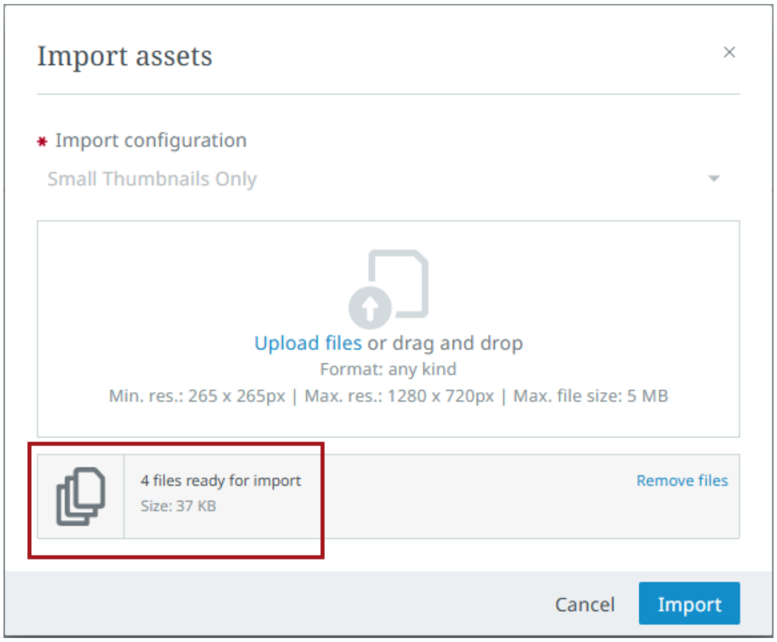
When the desired asset import configuration is selected, restrictions on which assets can be imported display within the dialog, as shown below.



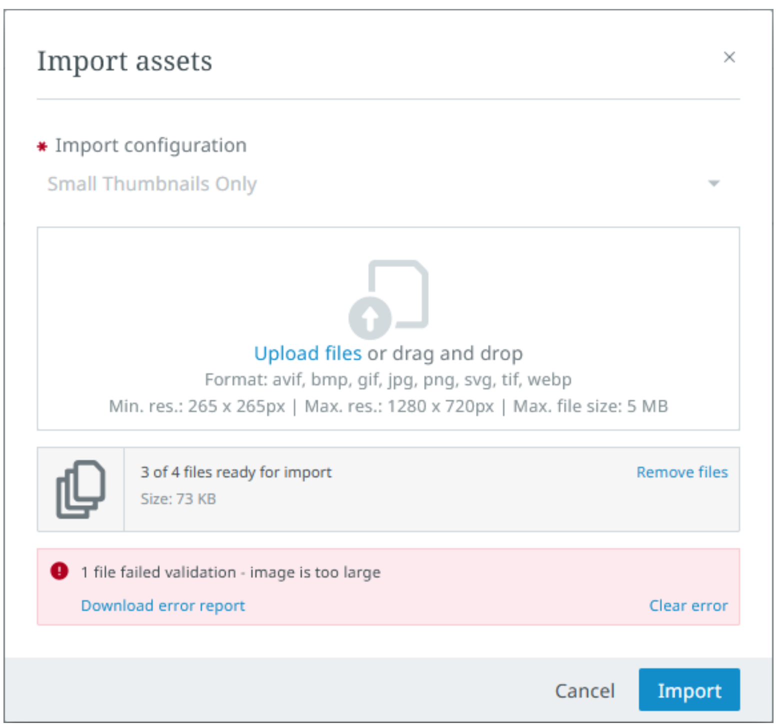
You can drag and drop assets into the dialog, or click "Upload files" to find the relevant assets on your machine to be imported.

Once assets have been selected, the selected import configuration cannot be changed without removing the assets from the pending import.

As the assets are added, the validation immediately evaluates the asset against any restrictions configured in the selected asset import configuration. The number of assets that will and will not be imported is updated in the dialog. To remove all assets validated for import, click the "Remove files" button.

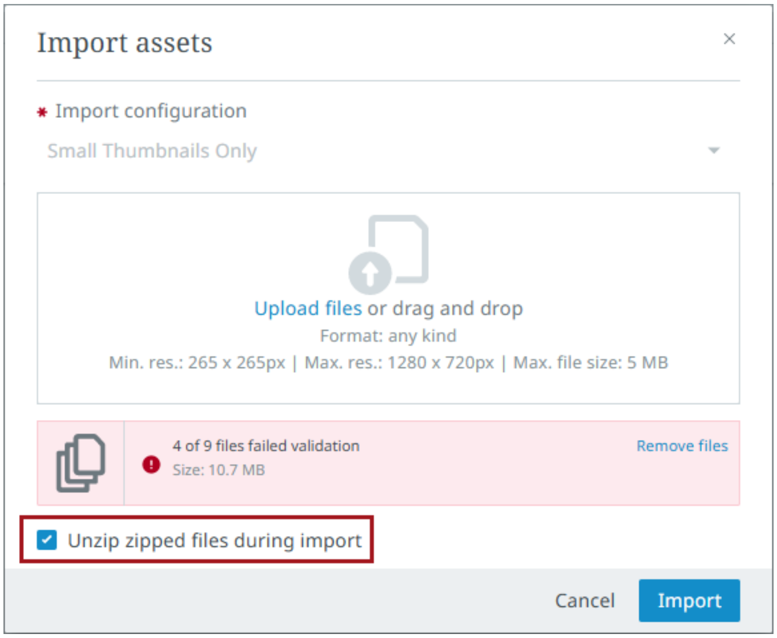


If assets do not comply with the validation configured for the selected import configuration, those assets will display in a separate red-shaded box, as shown in the screenshot below, and will not be part of the import.

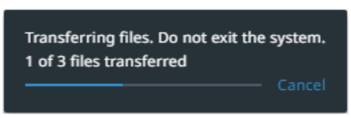


To remove one or more assets that have failed validation, click "Clear error" in the red-shaded box. For more information on why the asset failed validation, you can access a report by clicking "Download error report."

If the selected asset import configuration allows .zip files to be imported, these can be added to the proposed import. If you prefer that the files inside the .zip file are unzipped and imported, check the box for the setting called "Unzip zipped files during import."



While the asset import is in process, other tasks can be done in the Instrument UI, including initiation of additional import actions. If multiple asset imports are happening concurrently, a progress bar will display providing real-time information on the progress of all ongoing asset imports.



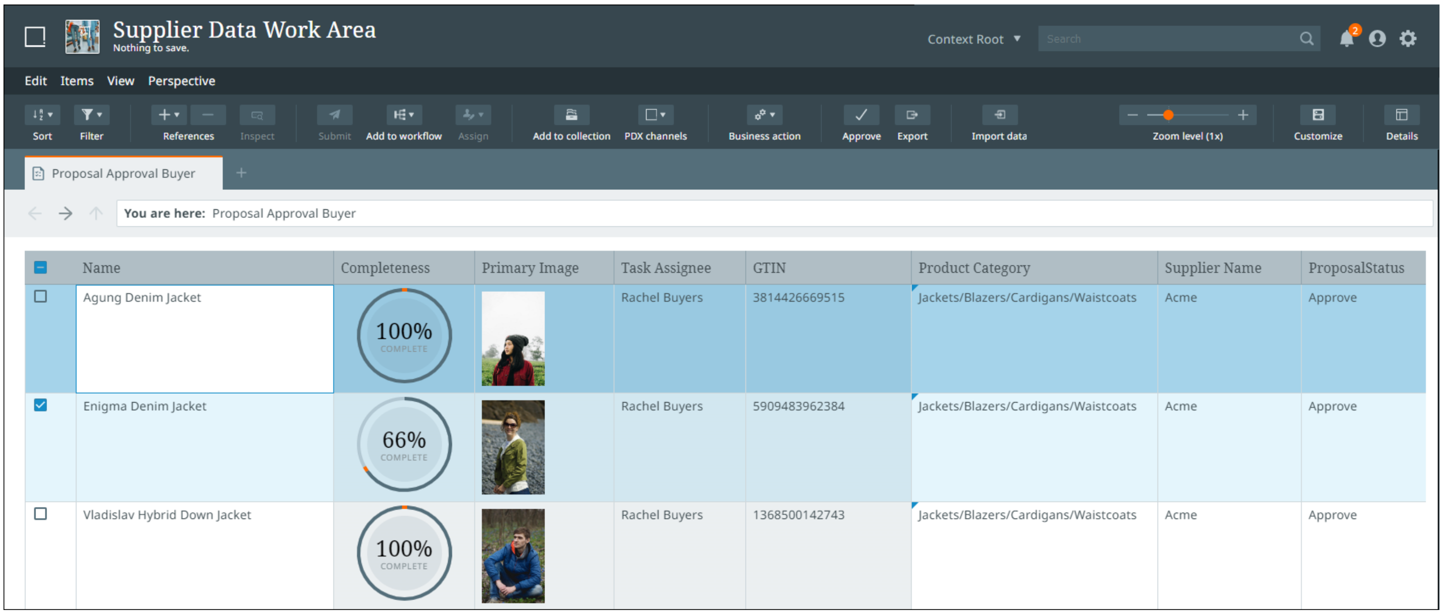
Clicking "Cancel" on this dialog will cancel all pending file transfer requests, but will not affect files already transferred, or in-progress background processes (BGPs).

For more information on importing assets specific to a product, refer to the Assets tab section of the Tabs topic.

Perspectives

In essence, a perspective is a customized view of a data source. It defines what data to visualize and how it is represented, providing you with an intuitive way of customizing views for your specific needs. When viewing a particular work area, each tab represents a different perspective within that work area.

Everything displayed below a selected tab is part of a perspective.



Listed below are links to the topics and groups of topics that cover the functionality of perspectives in Instrument:

- Perspective basics
- Menu
- Toolbar
- Tabs
- Managing data
- Browsing data
- Creating new objects
- Data quality and completeness

There are currently three types of perspectives to work from: Browse, Tasks, and Collections.

Perspective Basics

Perspectives are the primary way you will access the tasks you must perform in Instrument. As their name suggests, perspectives are designed to empower you to approach your work in a way that best suits you. Before perspectives can be configured to their full potential, you must first understand some of the basics of perspectives, which is what is covered in this topic.

Perspective Types

The first step in creating a perspective is to decide what type of perspective it will be. Because each of the three available perspective types serve a distinct purpose, different customization options and actions will be made available to you depending on the type you select.

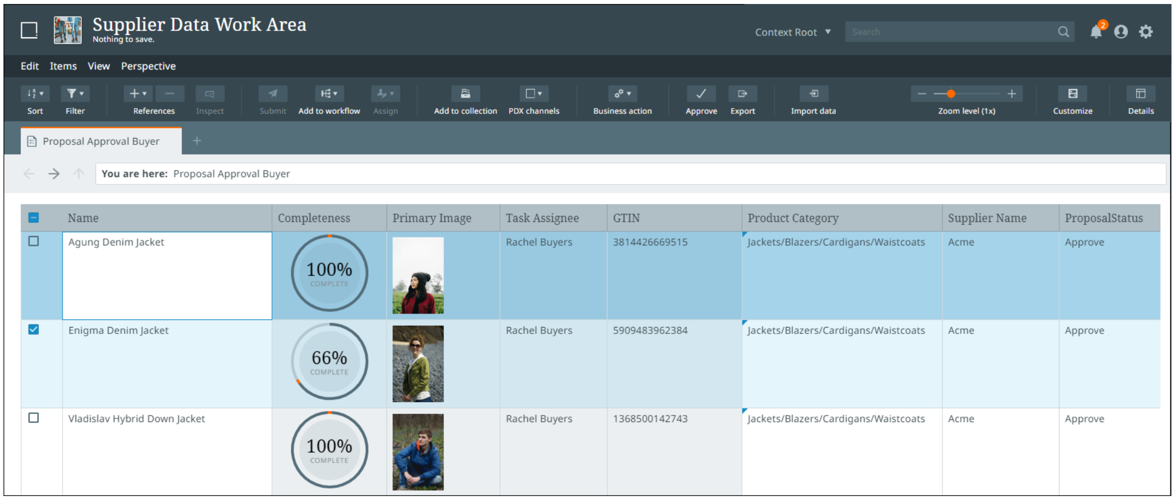
The perspective types are:

- Tasks - Allows you to organize tasks assigned to you and act upon those tasks.
- Browse - Enables you to explore your data via a customizable hierarchical tree.
- Collection - Allows you to organize and edit subsets of data pulled from search results.

Note: Collection perspectives are not created via the Add perspective button, but by clicking the "Add to collection" toolbar button.

Tasks Perspective

A Tasks perspective allows you to organize and act upon tasks assigned to you. These perspectives can be viewed using either the table or details views. In the screenshot below, the perspective is being viewed via the table view.



Available Actions

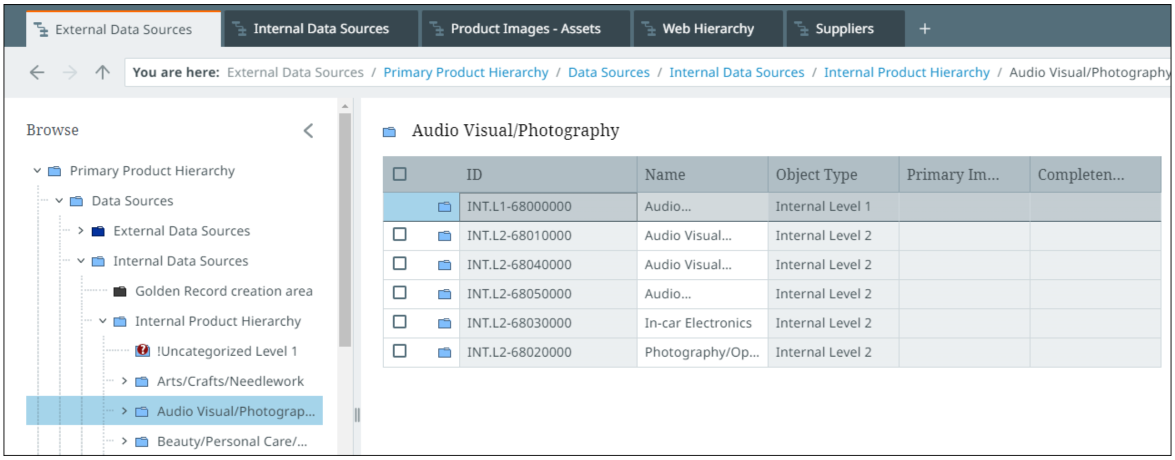
When selecting one or more tasks from within the perspective a number of actions are made available from the toolbar:

- **Submit** - This action submits the selected task(s) to the next state of whichever workflow it is in.
- **Add to workflow** - This action adds the selected task(s) to the desired workflow.
- **Business action** - This action applies the desired business action to the selected task(s).
- **Assign** - This action assigns the selected task(s) to the desired user.
- **Inspect** - This action allows you to inspect the details of selected references.
- **Export** - This action creates an export of the selected task(s).
- **Add to collection** - This action adds the selected task(s) to the desired collection.
- **Approve** - This action submits the selected product or products for approval.
- **Master product** - This action manages master product families and allows users to move objects into them.
- **Categorize** - This action moves objects to another location in the applicable hierarchy.

For more general information on how these Toolbar actions function, refer to the Toolbar topic in this section.

Browse Perspective

A Browse perspective allows you to customize your own tree for browsing products, entities, classifications, and other objects. Both the table and details views are available for Browse perspectives. The details view is shown in the screenshot below.



Available Actions

When selecting one or more objects from within the perspective a number of actions are made available from the toolbar:

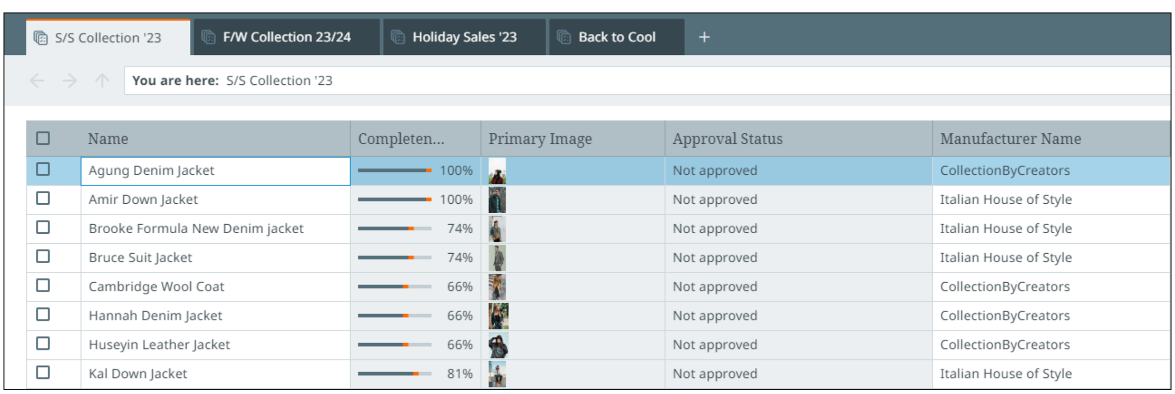
- **Add to workflow** - This action adds the selected object(s) to the desired workflow.
- **Business action** - This action applies the desired business action to the selected object(s).
- **Export** - This action creates an export of the selected object(s).
- **Add to collection** - This action adds the selected object(s) to the desired collection.
- **Master product** - This action manages master product families and allows users to move objects into them. Available for implementations that include Accelerator for Retail.
- **Categorize** - This action moves objects to another location in the applicable hierarchy. Available for implementations that include Accelerator for Retail.

For more information, refer to Browsing data.

For more general information on how these Toolbar actions function, refer to the Toolbar topic.

Collection Perspective

A Collection perspective allows you to organize and act upon objects within a given collection. Both the table and details views are available for collection perspectives.



Available Actions

When selecting one or more objects from within the perspective a number of actions are made available from the toolbar:

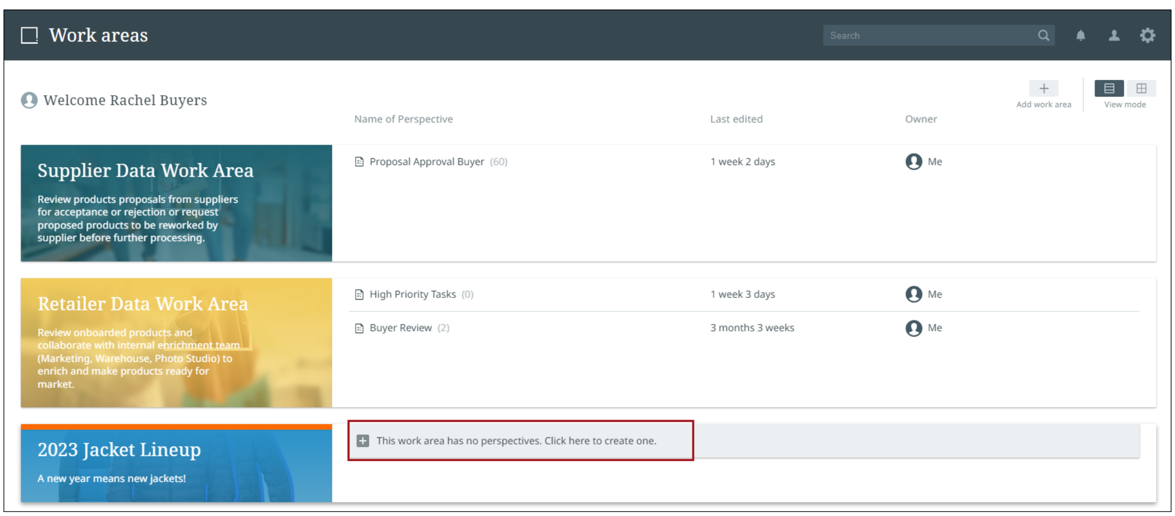
- **Add to workflow** - This action adds the selected objects(s) to the desired workflow.
- **Business action** - This action applies the desired business action to the selected objects(s).
- **Export** - This action creates an export of the selected objects(s).
- **Add to collection** - This action adds the selected objects(s) to the desired collection.
- **Approve** - This action submits the selected product or products for approval.
- **Master product** - This action manages master product families and allows users to move objects into them.
- **Categorize** - This action moves objects to another location in the applicable hierarchy.

For more general information on how these toolbar actions function and item selection maximums, refer to Toolbar.

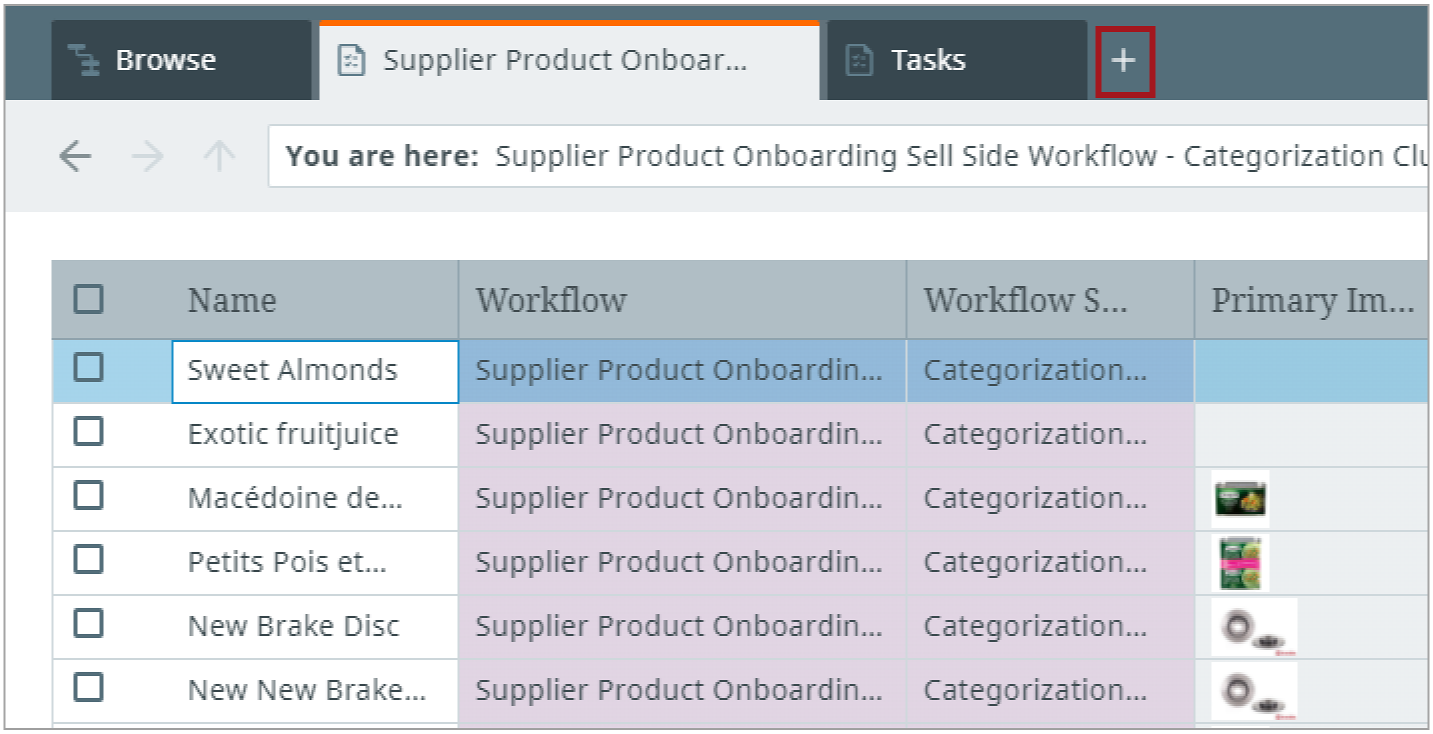
Adding a New Perspective

Perspectives can be added to work areas in one of two ways. The first is via the work areas screen.

To add a new perspective to an empty work area, first select the empty work area row.

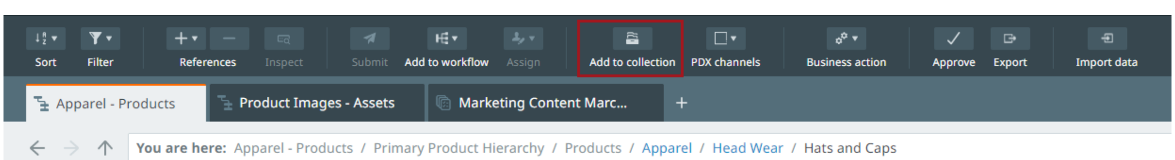


The second method to add a perspective is from within the perspective itself. When within a perspective, select the plus button to the right of the existing perspective tab(s).



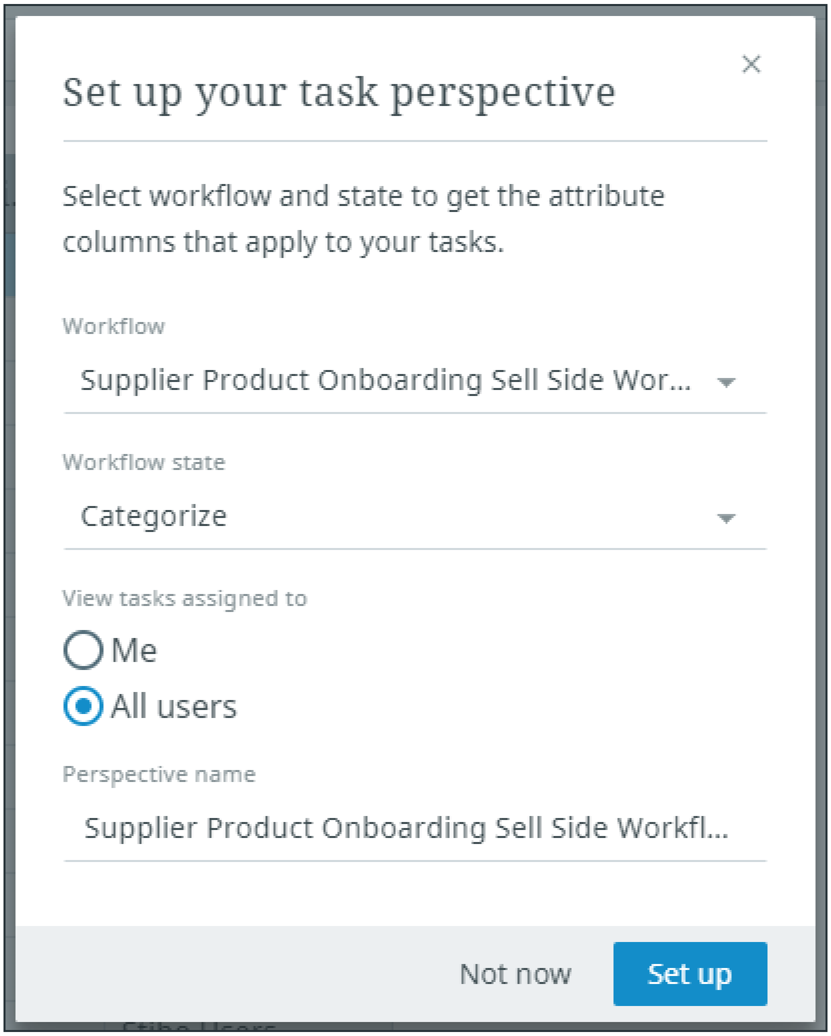
Using either method, you will presented with a choice to create either a Tasks perspective, or a Browse perspective. Click the relevant option.

It is also possible to create a Collection perspective. You can create a Collection perspective by selecting objects in either a Tasks, Browse, or Collection perspective, (or from search results), and then clicking the "Add to collection" button, located in the toolbar.



Additional Tasks Perspective Setup

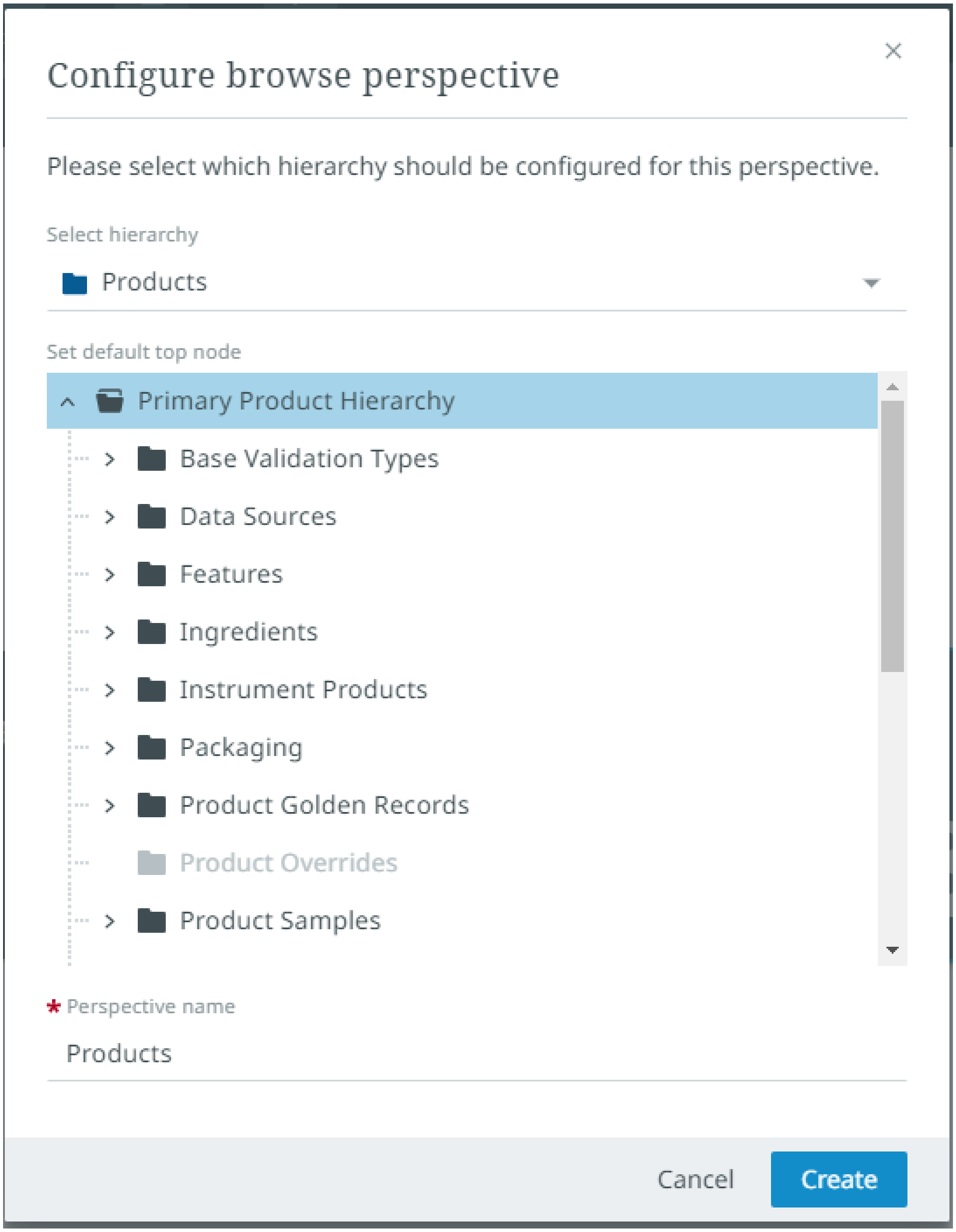
If you select "Tasks", a window will appear prompting you to specify which workflow and workflow state to build your perspective around, whether to only show tasks assigned to you or all users, and to provide a name for the perspective. Anything specified here will automatically apply relevant filters to the perspective upon creation. However, selecting "Not now" will close the window and create the perspective without applying any filters.



For more information on filters, refer to Filtering.

Additional Browse Perspective Setup

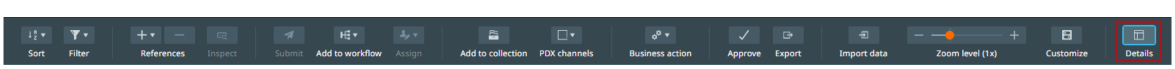
If you select "Browse," a window will appear prompting you to specify a name for the perspective. Select an object hierarchy from the dropdown to determine which parts of the hierarchy will display in the navigation tree.



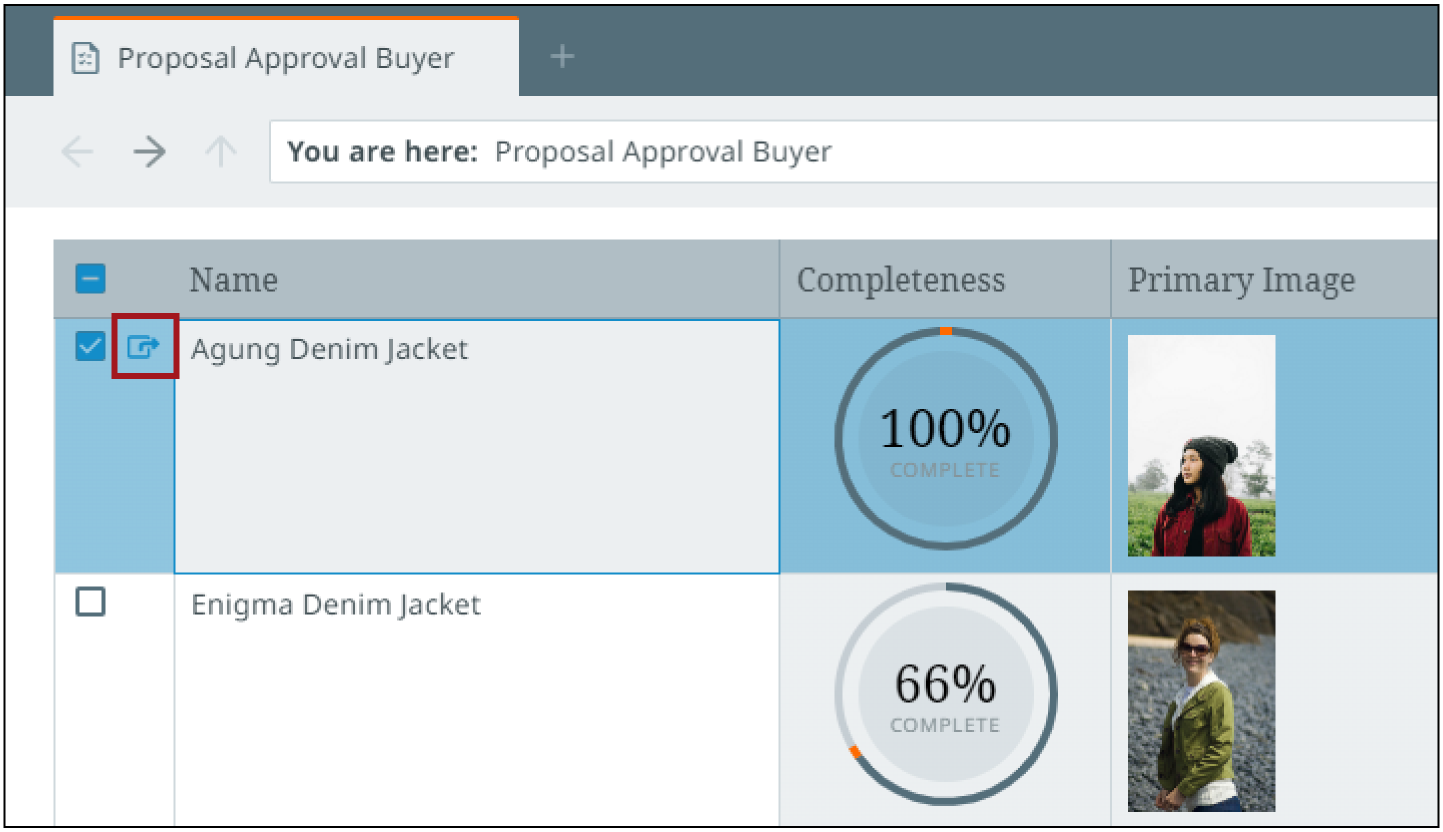
Perspective Views

There are two different ways to view data within a perspective: list view and details view. The list view provides a high-level view of all the tasks or objects in a given perspective, while the details view focuses on the details of a specific task or object.

From the toolbar, you can switch between these views by clicking the Details button.



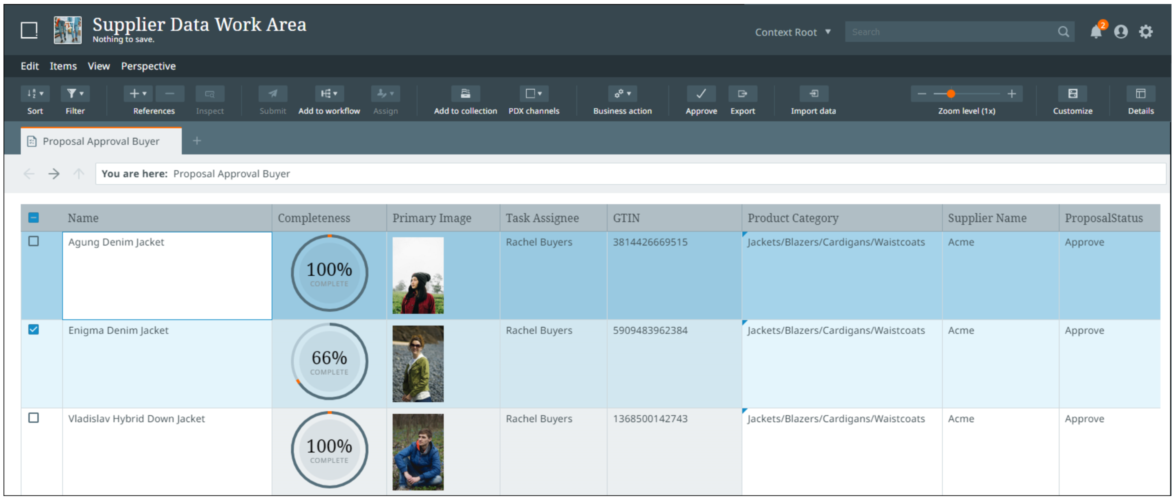
You can switch to the details view from the list view by hovering your cursor over the relevant row and clicking the arrow icon next to the checkbox of a particular task.



List View

The list view features a table displaying your items (which might be tasks or products, depending on the perspective) and details about those items. Besides alphanumeric characters, perspective tables can contain multiple types of data, such as statuses, images, and icons.

> **Important:** The Select All option, found in the header row of the table, allows you to select all items in a table. Alternatively, you can select up to 500 items manually by checking the checkbox for each desired item. Refer to the Toolbar topic for other maximums that you need to consider when taking actions on perspective selections.



Several options are available for customizing the list view, including:

- Sorting/filtering tasks and objects
- Adding/removing columns
- Adjusting the zoom level

For more information on customizing this view, refer to the Customizing columns, Sorting, and Filtering topics.

Data within gray cells is read-only; data within white cells can be edited (go to Managing data for more details).

Line breaks can be added to text attribute values within a cell using the Enter + Shift key combo. Refer to Attributes in this section for details.

Copying and pasting data (via OS shortcuts and the web browser menu) can be done between cells within the interface and external applications. If you are unable to copy or paste something within the interface, you will get an on-screen notification. For example:

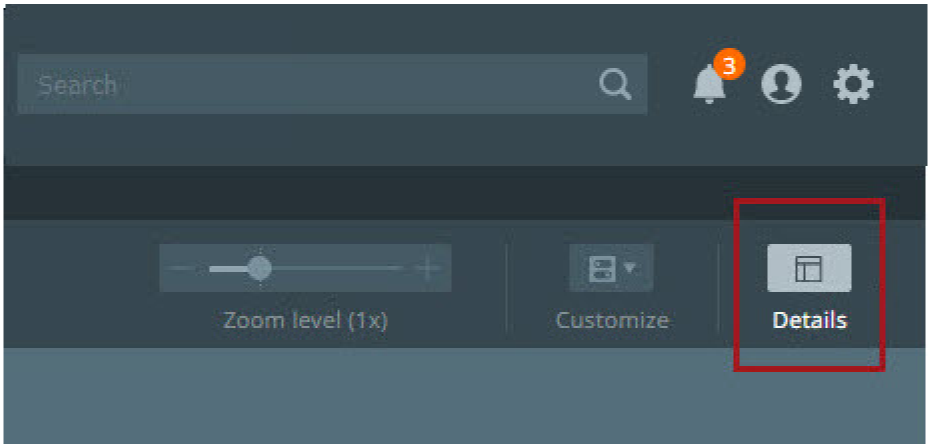
Note: Date, ISO Date, and ISO Date Time column types all accept plain text, which is either in those forenamed formats as well as the DDMMYYYY format (for example, 21/02/2023 or 21.02.2023).

Zoom Level

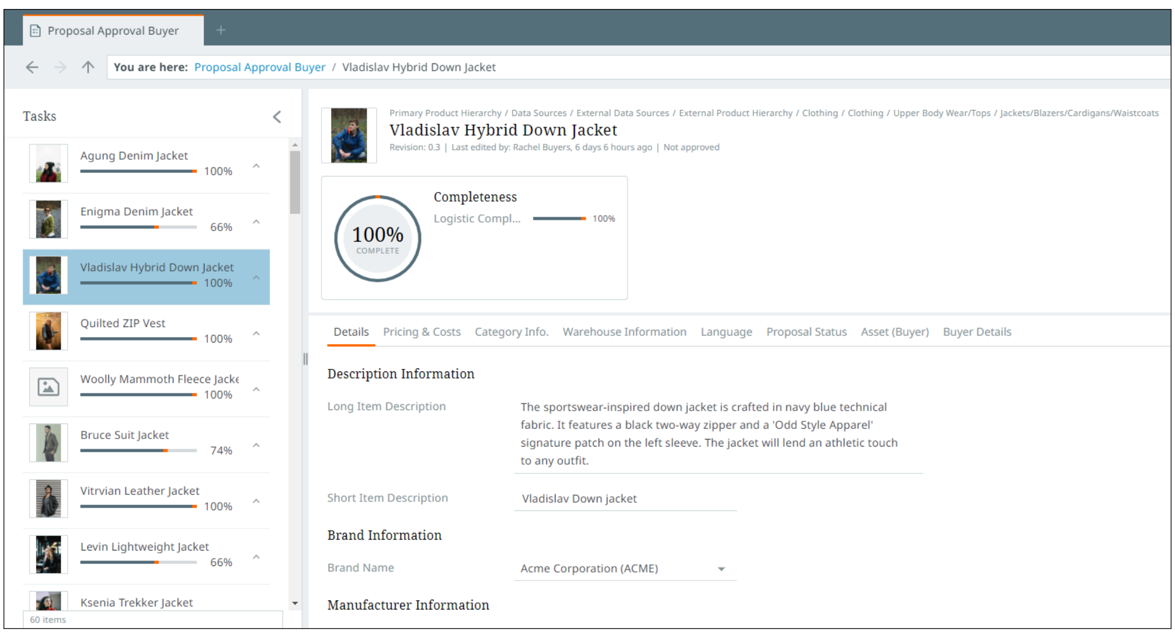
You can specify the height of each row in the perspective data by adjusting the zoom level. Doing so may reveal more information that may otherwise have been hidden if contained within a smaller cell.

Details View

The details view focuses on the details of a specific item. The details view can be accessed by clicking the "Details" button found in the toolbar near the right-hand side of the screen.



In the "Tasks" perspective, for example, the "Details" view shows the details of an item contained in a workflow, thus representing a workflow task. Details for an item in this perspective (shown below) are presented to the user in configurable tabs that can display referenced images and other assets, attributes, attributes groups, languages, and more.



Additionally, items accessed via a "Browse" perspective hierarchy can also be shown via the "Details" view. If, for instance, the user adds a "Browse" perspective to view their assets, they can select an asset, click the "Details" view, and attributes for that asset will display beneath a summary of that asset. For asset attributes that can be edited, users can add and update those values.

Various kinds of information can be displayed via the "Details" view, often through a series of tabs. Tabs can be added in the configuration tool.

For more information on the configuration tool, refer to the Configuration Tool topic.

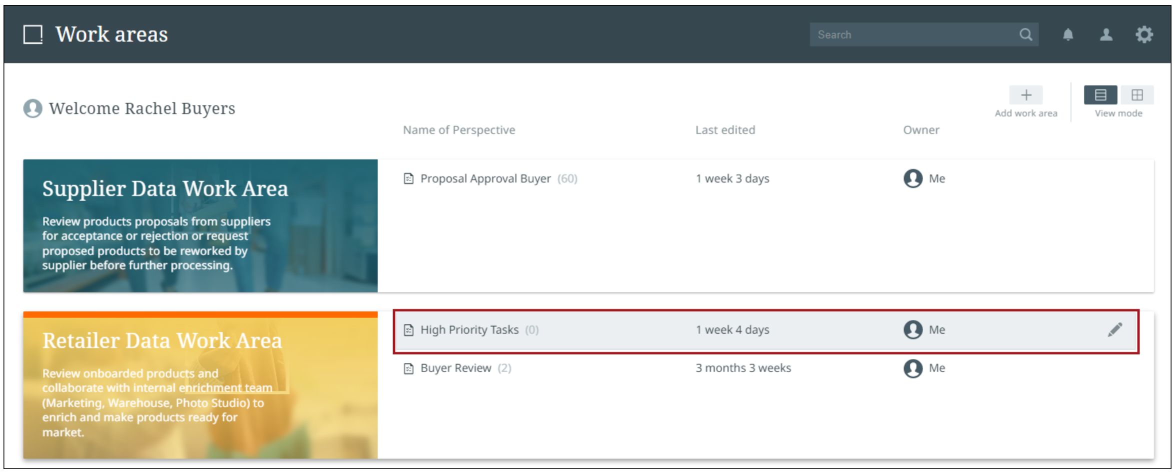
Note: When you are in the details view, you will have a breadcrumb bar. Another breadcrumb bar with read-only breadcrumbs is shown above the product name to indicate where you are in the hierarchy. If using the details view, the system uses these breadcrumbs to mark your position within each perspective when you log out, and will return you to the same view when you enter each perspective upon your next login.

Navigating Perspectives

Instrument provides several ways to navigate between work areas and perspectives screens, as well as between the perspectives themselves.

Work Areas Screen

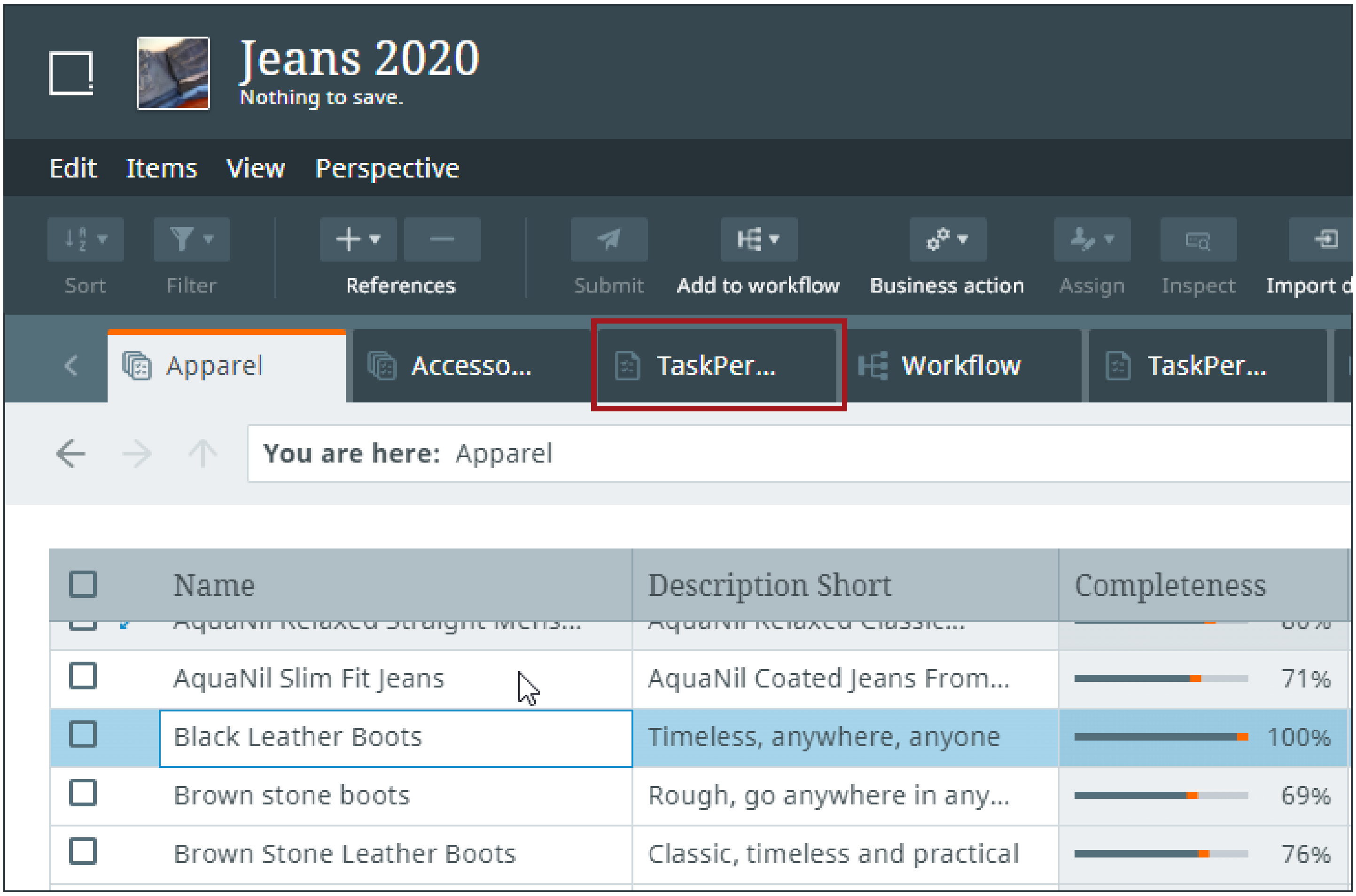
To access a perspective from the Work areas screen, click the perspective you want to open.



Alternatively, you can click the work area image and it will open the last perspective you looked at within that work area.

Perspectives Screen

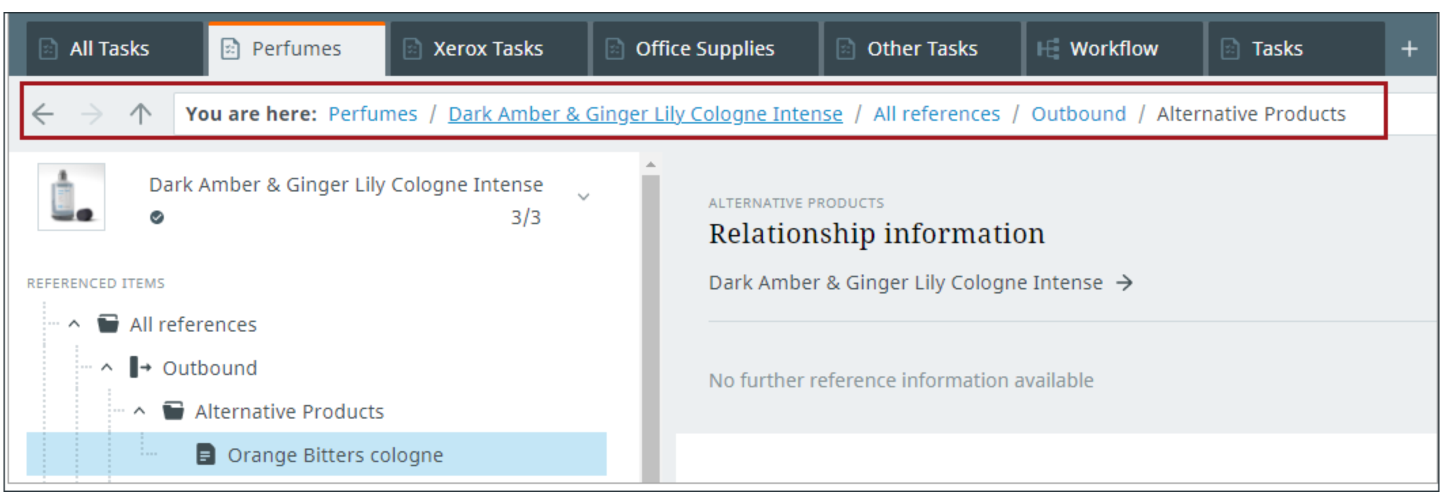
From the perspectives screen, you can navigate between different perspectives in a given work area by selecting the perspective's tab.



Breadcrumb Bar

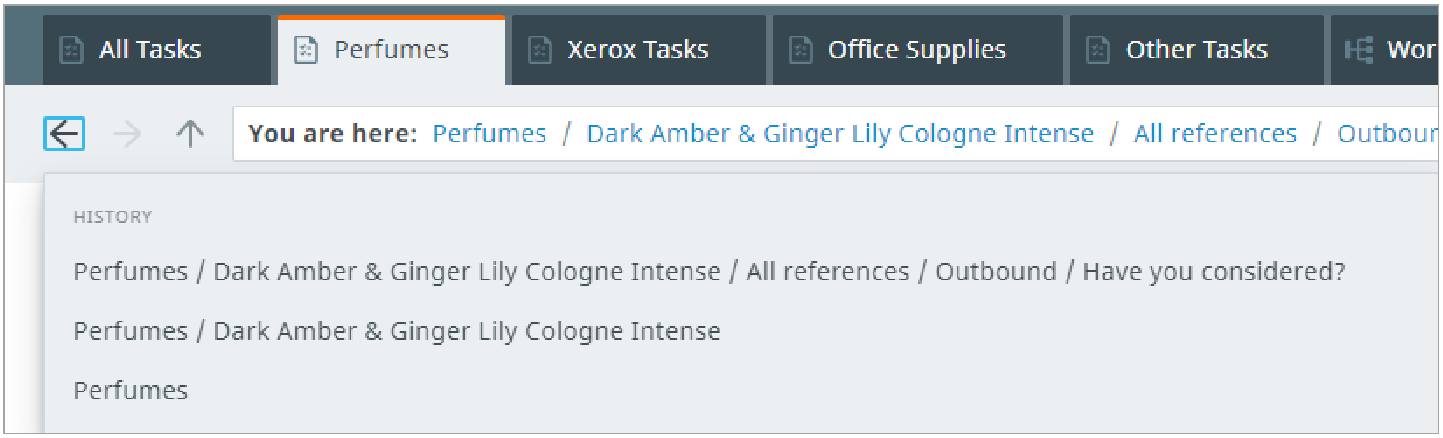
For easy navigation, the breadcrumb bar shows you breadcrumbs of where you are within a Tasks perspective. References are also reflected in the breadcrumb, if applicable.

Navigating breadcrumbs is described below.



On the breadcrumb bar, you can:

- Navigate through the hierarchy by using the left, right, and up arrow buttons to the left of the breadcrumbs.
- Select different reference types within the navigational breadcrumb pages.
- Hold the right and left arrow buttons down to display a history of where you have been within the perspective (as shown in the example image that follows).



Note: Preset work area and perspective configurations set by admin users become the default settings for assigned user groups. Columns and filters set by admins display to users. Admin-defined filters cannot be deleted or overwritten by users once set. A tool tip message displays stating, "You cannot overwrite admin configurations." However, custom settings such as zoom, additional filters, and column width can still be manipulated and maintained by users in preset perspectives. Upon saving these changes, the 'Reset to default' feature is enabled which allows users to revert to default settings defined by admins. Preset work areas can be duplicated and further customized by users in the duplication. Custom work areas, identified by a "Custom" label above the work area name, are configured by the user and are customized based on user preferences and privileges.

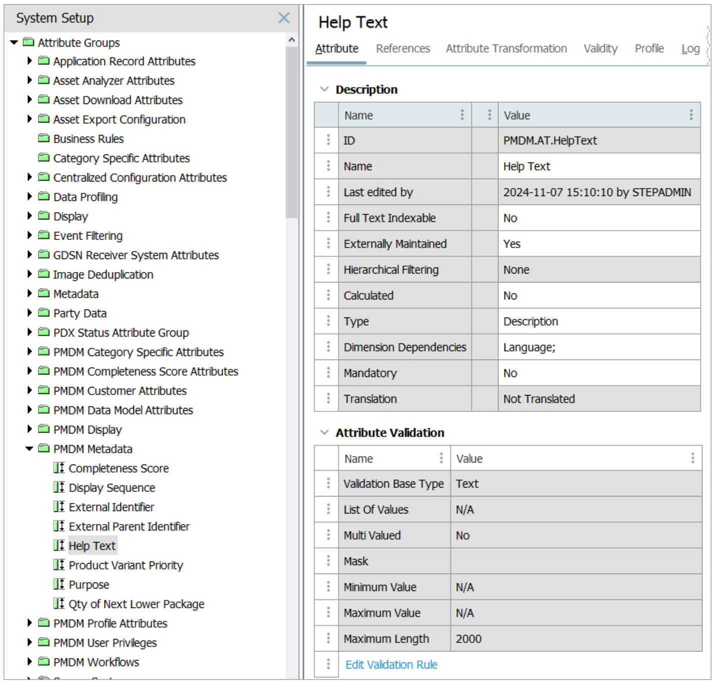
Help Text Tool Tip

A help text tool tip can be configured for assets, references, and data container type fields and is used to guide an end user by giving context for enriching data. An icon ( ) will be displayed next to any fields with the help text field enriched and hovering over or clicking on the icon will allow the user to view the help text. It can be seen throughout Instrument; for example, table headers, attributes table of the details view, and reference headers on Reference tab pages.

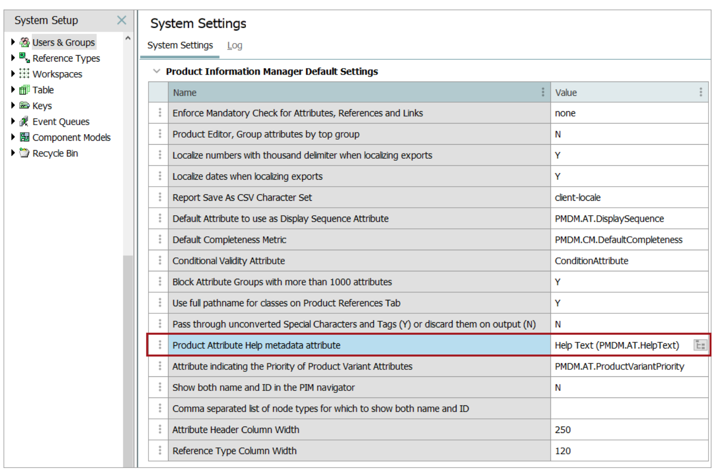
Help Text Tool Tip Configuration

How to configure a help text tool tip is described below:

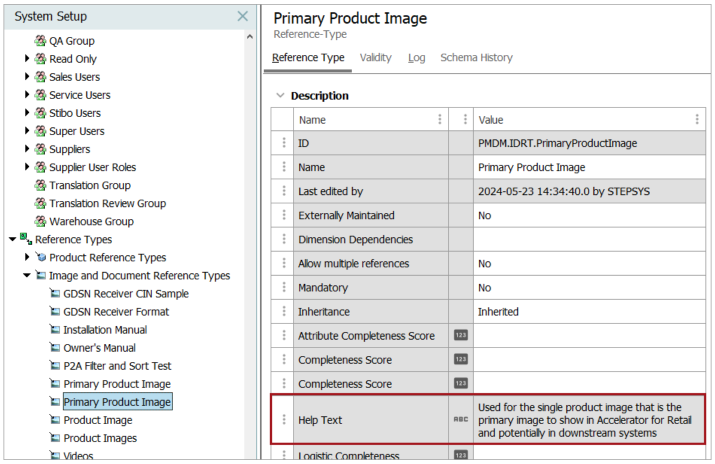
1. In STEP Workbench, create a metadata attribute with a 'Text' validation base type. Refer to the Creating Attributes topic in the System Setup documentation for more information.



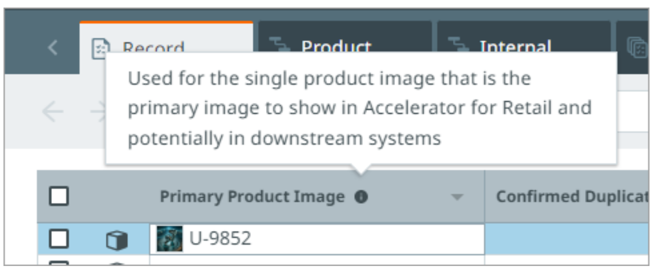
2. Navigate to **Users & Groups** in the System Setup menu, and under the System Settings tab, verify the value of the variable under the 'Product Information Manager Default Settings' flipper of 'Product Attribute Help metadata attribute' is set with the attribute created in step 1.



3. Navigate to the asset, reference, or data container field needing the help text. Find the 'Help Text' variable and enter the Help Text message as the value.

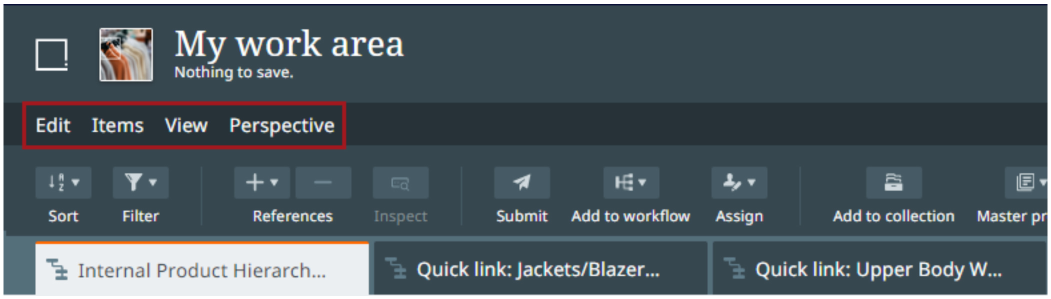


4. In Instrument, navigate to the perspective utilizing the field with the help text configured. Verify the help text by hovering over or clicking on the help text icon ( ) next to the configured field to display the help text.



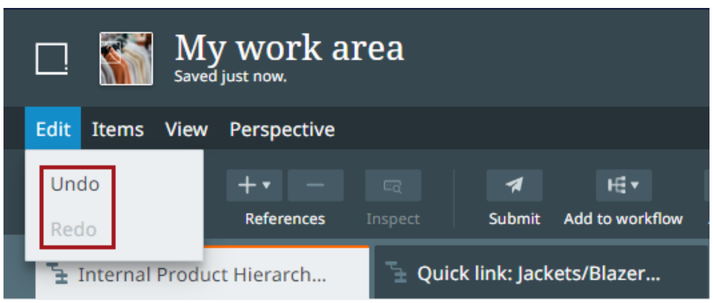
Menu

The menu allows you to perform a number of actions, including those listed on the toolbar. These actions are split into distinct categories: Edit, Items, View, and Perspective.



Edit

The Edit menu options include Undo and Redo, allowing you to undo or redo changes to the data you have made.

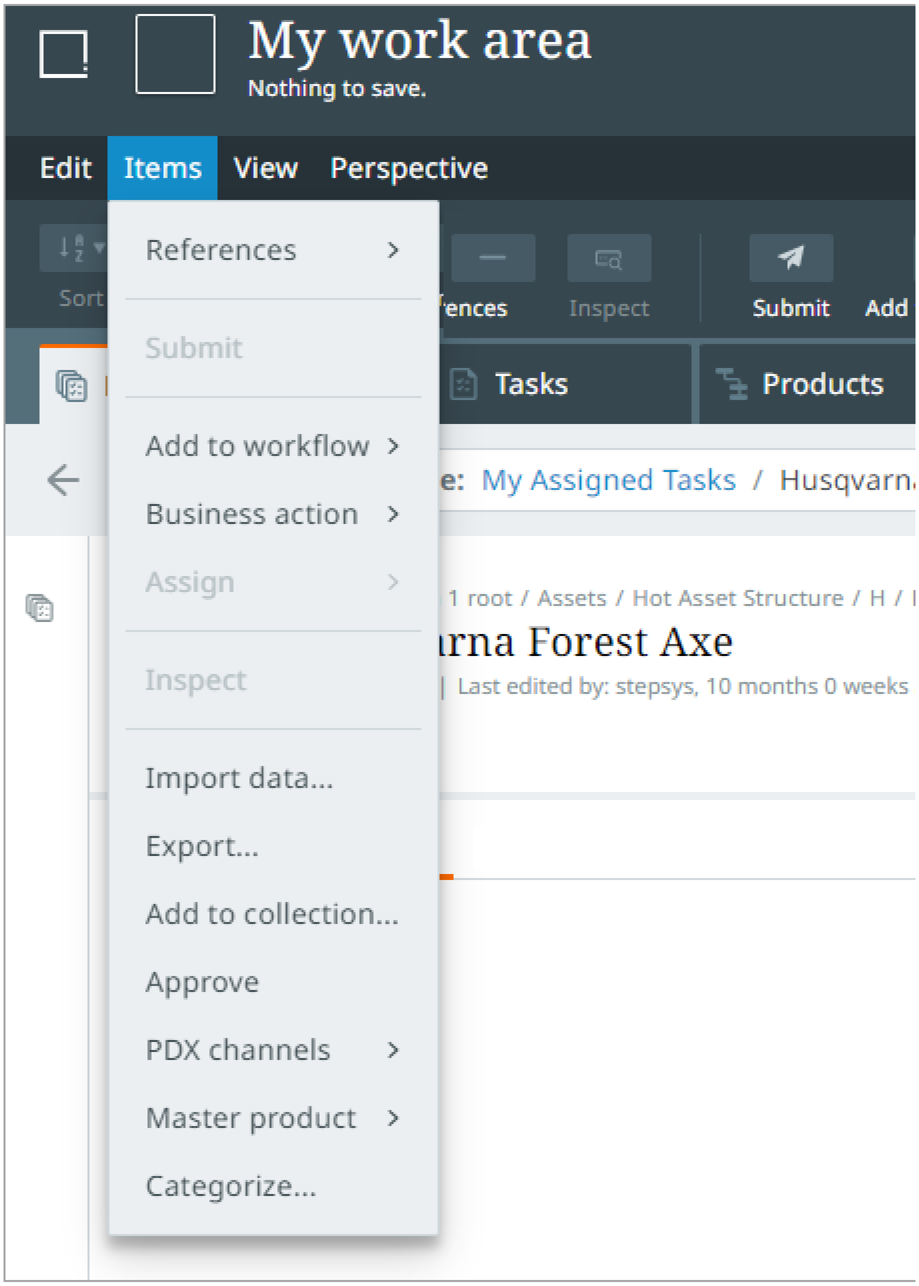


Items

The Items menu options provide an alternative means to accessing several toolbar actions: References, Submit, Add to workflow, Business action, Assign, Inspect, Import data, Export, Add to collection, Approve, PDX channels, Master product, and Categorize.

Note: The Master product and Categorize actions will only appear for users of the Accelerator for Retail solution.

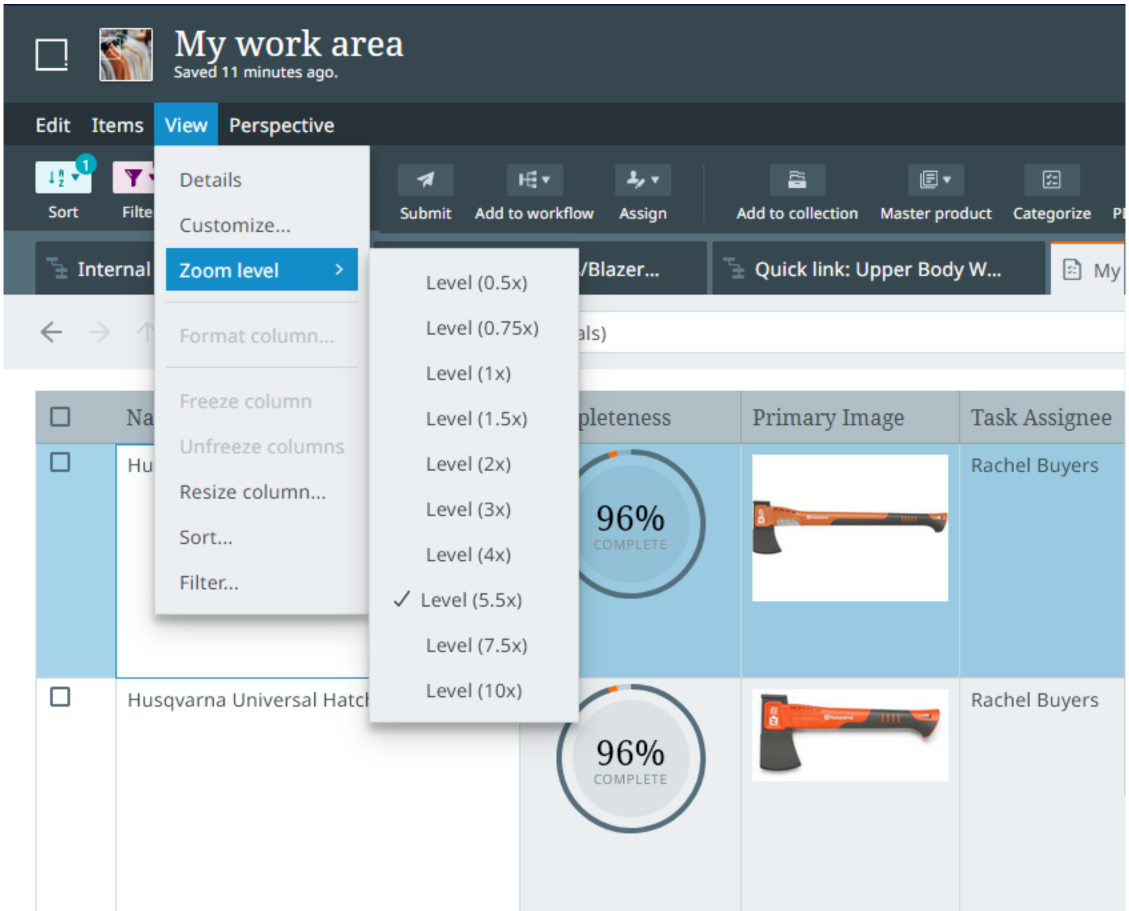
Note: To access the PDX functionality, the Product Data Exchange Syndication commercial license must be enabled on your system. Contact your Stibo Systems account manager for information on enabling this license.



Refer to Toolbar for more information.

View

The View menu options include some toolbar actions such as Details, Customize, Zoom level, Sort, and Filter, as well as additional actions such as Format column, Freeze column, Unfreeze columns, and Resize column.

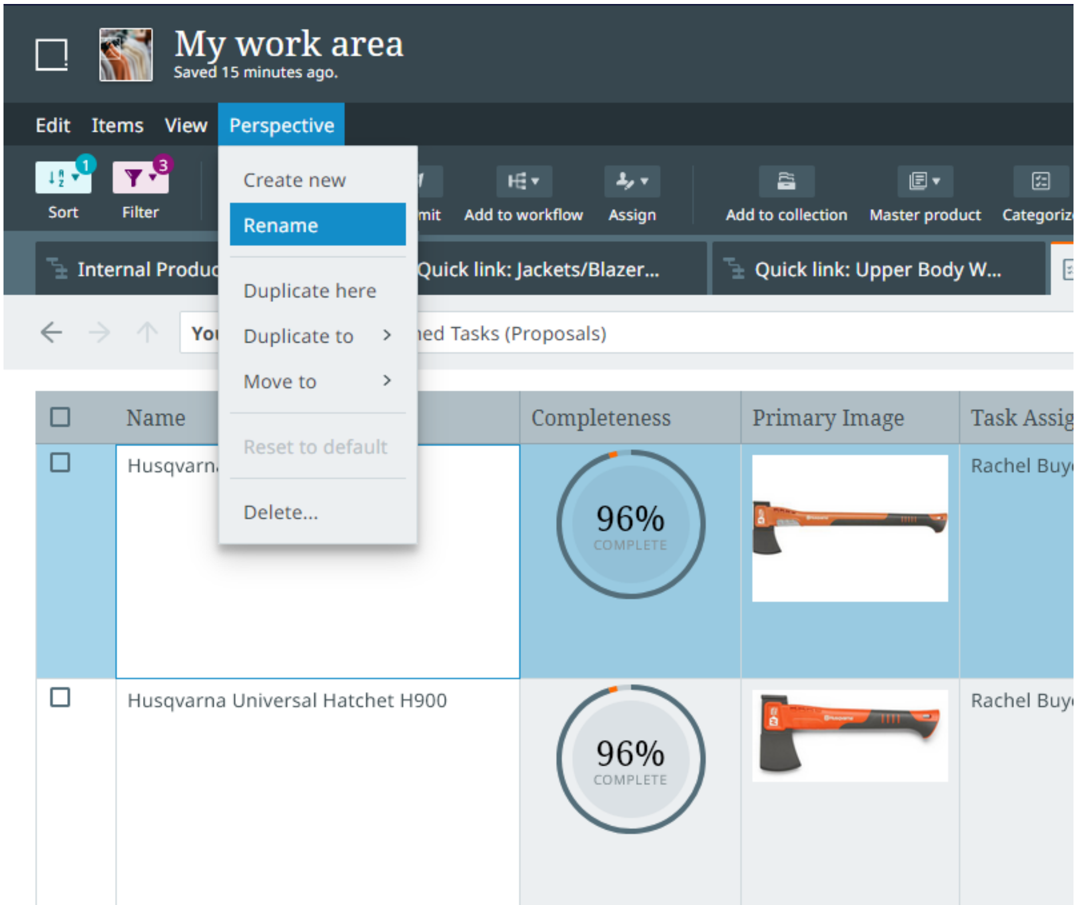


Refer to Toolbar for more information on Toolbar actions.

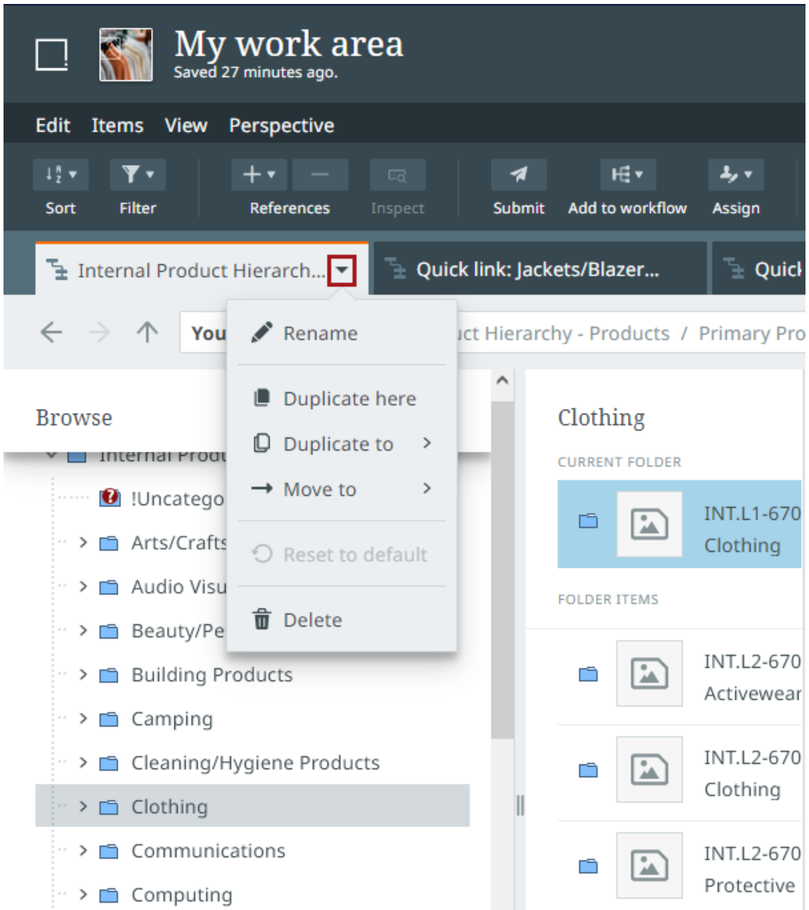
Refer to Customizing columns and References for information on the additional options.

Perspective

The Perspective menu options include Create new, Rename, Duplicate, Copy to, Move to, Restore to default, and Delete.



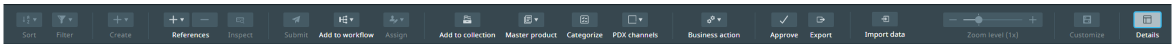
You can also access this edit menu by hovering your cursor over the desired perspective tab and clicking the down-arrow icon.



- Create new will direct you to the perspective creation screen. Refer to Perspective basics for more information.
- Rename opens a text field allowing you to rename the perspective in the tab. You can also double-click the tab to open the text field.
- Duplicate creates a copy of the perspective. A message will appear shortly after to inform you of the successful duplication.
- Delete prompts you to confirm deletion of the perspective.
- Copy to allows you to create a copy of the perspective that can be moved to a different work area you designate. Similarly, selecting "Move to" allows you to move the perspective to a different work area you designate. Both actions will prompt a message to appear informing you of its success.

Toolbar

The toolbar, which runs horizontally above the perspective tabs, holds the bulk of the functionality available in the perspectives. The toolbar buttons display contextually, meaning they display based on the perspective being viewed or the actions taken by the user. This results in display of only those options likely to be related to the tasks at hand.



For instance, when viewing a collection, the "Assign" button does not display, as the "Assign" button can only be used to assign tasks to other users. As tasks do not reside within collections, there would be nothing to assign. Further, while viewing an appropriate perspective (Tasks perspective in this case), the "Assign" button will not be active (clickable) until at least one item has been selected, as a task upon which to execute the action must first be indicated in order to assign it to a different user.

Each button available in the toolbar is listed and described below, with links to button-specific topics if available. Additionally, all topics related to the toolbar buttons can be found beneath this topic.

Each button is available in the Browse, Tasks, and Collections perspectives, unless stated otherwise.

- **Sort** - Enables users to sort the table data in alphabetical order based on any selected column. Details can be found in the Sorting topic.
- **Filter** - The Filter toolbar button allows users to manage the display of data in a table to present the information in a more meaningful way. For example, if a user wants to show only list items that have content in a specific column, they may select the relevant column, select the "Not Empty" option from the condition dropdown, and apply the filter. Go to the Filtering topic for more on this functionality.
- **Create** - The Create toolbar button allows users to create a new object and immediately initiate that object into a workflow within a Tasks perspective. Go to the Creating and Initiating a New Object within the Tasks Perspective topic for more on this functionality.
- **References** - The "+" (Add) button is for adding references. The "-" (Remove) button removes a selected reference. "Remove" is also an option under the Items > References menu and only becomes enabled (in both places) when working within an existing reference in a reference table. Go to the References topic for information on reference tables.
- **Inspect** - This action allows you to inspect the details of selected references.
- **Submit** - Allows users to submit a selection of one or more items in the table to the next step in the workflow. Available in the Tasks and Browse perspectives.*
- **Add to workflow** - Make a selection from the table and click the Add to workflow button to display a dropdown containing the names of all workflows configured on that system. Locate the desired workflow and click it. The selected items are then added to the workflow. Workflows listed in black text can be submitted to, while those in gray cannot. Available in the Tasks and Browse perspectives, as well as the Search screen.*
- **Assign** - When viewing workflow tasks in a Tasks perspective, users can select tasks / items in the table, and then assign them to themselves, other groups, or other users. This button is only available in the Tasks perspective.*
- **Add to Collection** - Select items within a perspective, and click the "Add to Collection" button to create a new collection or add the items to an existing one. Use the check mark to add the collection or the trash icon to delete the information you have entered. To add the selection to the collection, you will choose "Add to collection" at the bottom of the dialog. If a collection or collections already exist, they will be listed in the dialog. Make a collection selection and "Add to collection." As items are added to a collection, the notification center is updated and the notification gives you a link to the collection.
- **Master product** - These actions allows users to manage master product families and add products to them. Refer to the Managing master products topic for more details. Available in the Tasks, Browse, and Collection perspectives. This button will only appear for users of the Accelerator for Retail solution.

- **Categorize** - Select one or more products to move to another locations in the product hierarchy. Refer to the Categorizing objects topic for more details. Available in the Task, Browse, and Collection perspectives. This button will only appear for users of the Accelerator for Retail solution.
- **PDX channels** - Clicking this option allows you to select "Add to PDX channel" or "Remove from PDX channel" to one or more products in perspectives table. The PDX channel solution in Instrument supports business processes to be executed before the actual syndication takes place. Refer to PDX Channels Setupfor more details.
- **Business action** - With one or more items selected from the table, click the Business action button to apply a pre-configured business action to that selection. The Business action button's dropdown displays business actions that can be applied to the item(s) in the selection. Business actions listed in black text can be applied to the selection, while those in gray cannot. Hover the cursor over each business action for additional information. Find the desired business action and click it. Subject to the business rule configuration and the selected items' suitability, the items in the selection will then have the business action applied to them. Available in the Tasks and Browse perspectives, as well as the Search screen.*

> Admin users have the ability to determine which business actions are available to users when the Business action button is selected. Information can be found in the Setting business action availability topic in the Administration section.

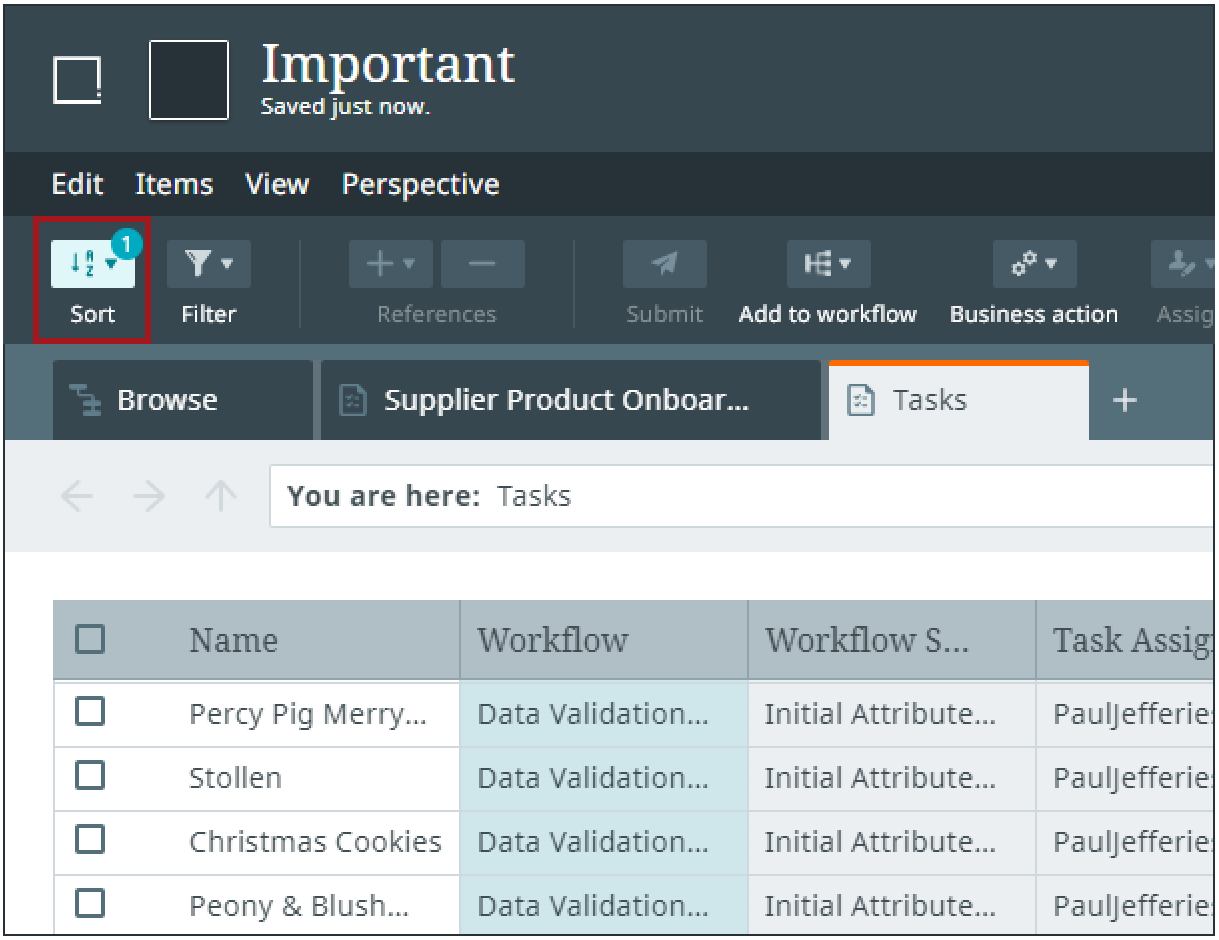
- **Approve** - Select one or more items to enable and use the "Approve" button. Go to the Approving data topic for more about approving items and selection maximums that apply to this action.
- **Export** - Make a selection from the table and click the Export button to export (based on an export configuration) the configured attributes and references displaying on the screen. The export is sent to a background process where it is listed in the notification center. Click the "Download file" link at the bottom of the export listing to open the file with the exported data. Refer to the Exporting data topic for more details and important information around selection maximums that impact this action.
- **Import data** - Using an import configuration, import product data by uploading an import file. A background process is created that imports the data. Any applicable notifications are shown in the notification center, and an execution report provides you with import details (including any error info, if applicable). Refer to the Importing data topic for more details.
- **Zoom level** - Users can specify the height of each row in the table by adjusting the zoom level. Doing so may reveal more information that may otherwise have been hidden if contained within a smaller cell.
- **Customize** - This toolbar button opens a dialog that enables users to configure their view of the table by selecting which columns to display. Refer to the Customizing columns topic for more on this functionality.
- **Details** - Allows users to toggle between a list view (default) and a details view. The list view shows a list of items in a table, while the details view lists the items in a column on the left side of the screen and shows product details on the right side of the screen.

**This action has a limit of 50 items and will be disabled when you have more than 50 items selected. This limit is only temporary and will be increased in the future.*

Sorting

One or more fields can be sorted by ascending or descending alphabetical order. This makes it easier for you to find a group of tasks easier. For example, you may want to sort tasks based on task assignee, task status, or task deadline.

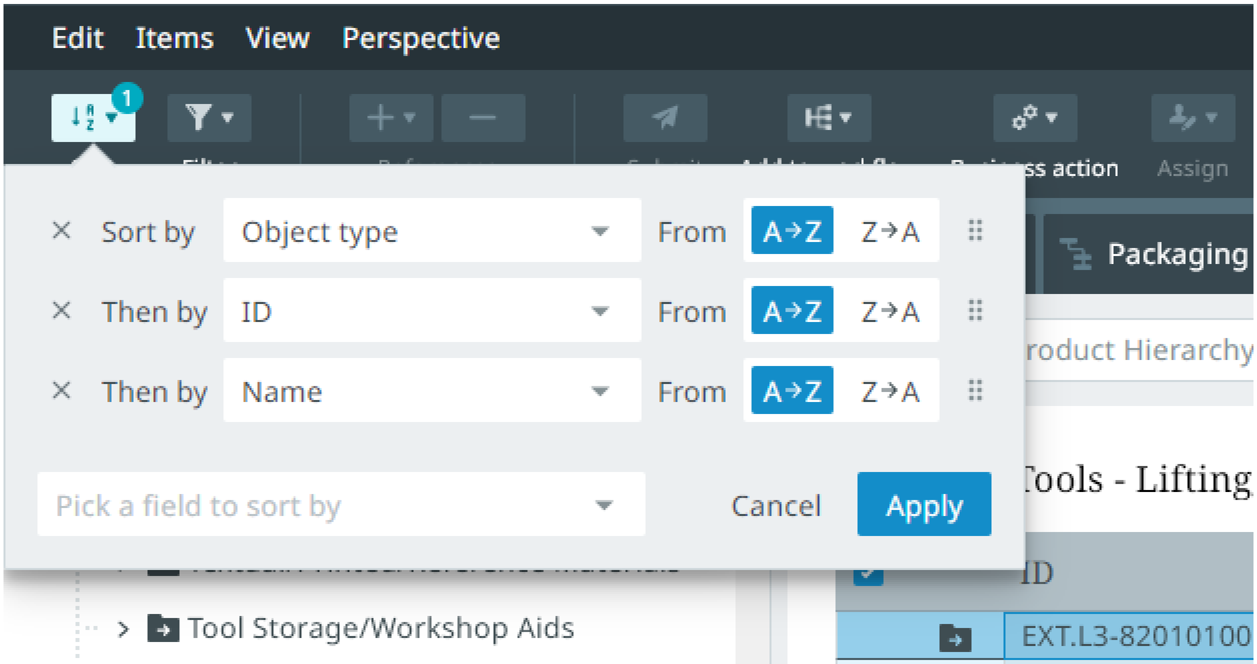
To sort a perspective, select Sort from the toolbar.



In the sort menu that appears, browse or search for the desired field and specify whether it should sort by ascending or descending alphabetical order.

Note: You can only sort on attributes and aspects.

If you configure the perspective to sort by multiple fields, it will sort them in order of appearance on the Sort by list. This order can be changed by dragging and dropping the fields with the drag handles. For example, in the below image the perspective sort priority is Workflows first, then Name, and finally Object Type.



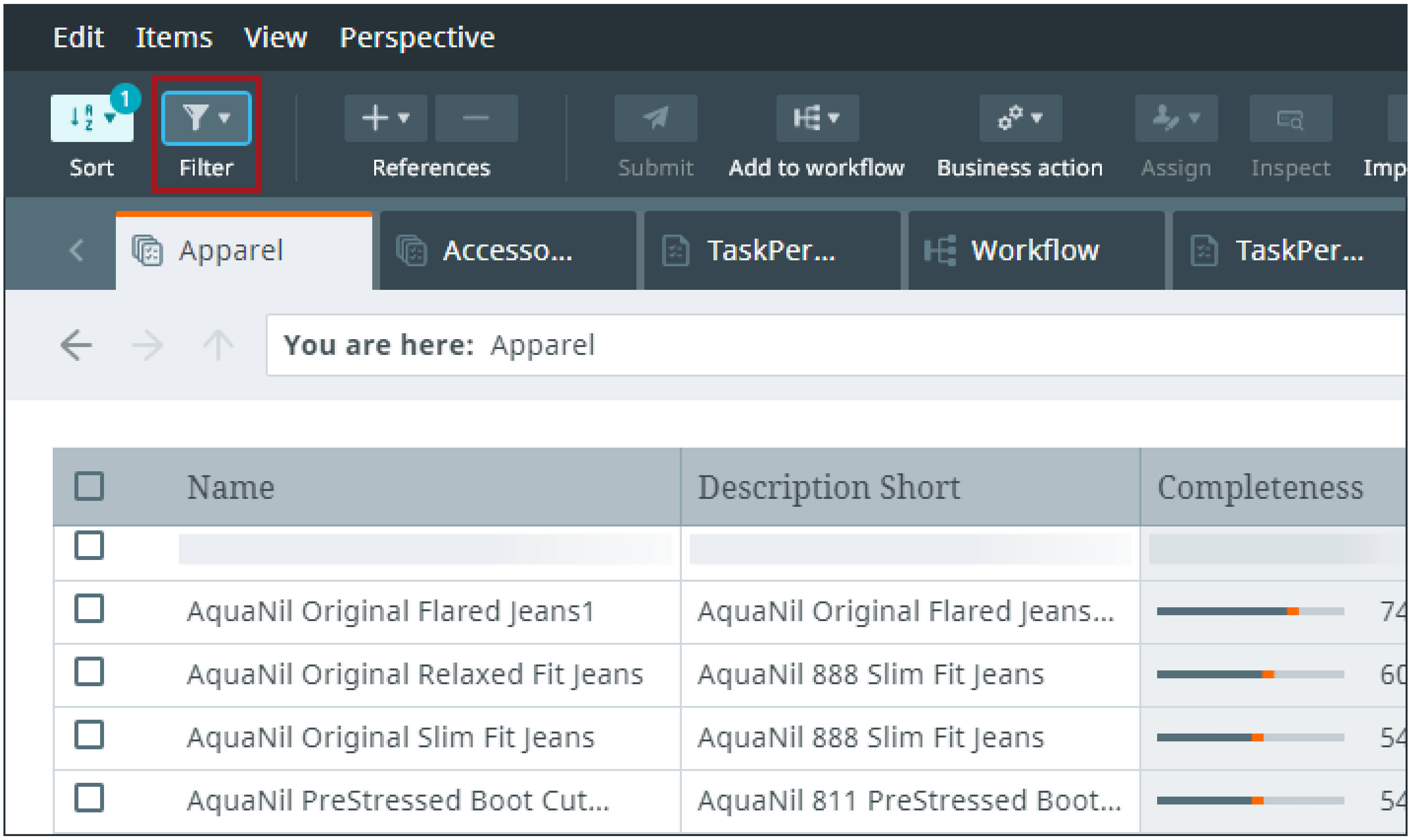
Note: Ascending / descending order for the Approval Status column is done by status and not alphabetically. For example, ascending order is as follows: Approved, Approved in current context, Partially approved, Not approved. Any objects that have an empty (none) Approval Status, which could be the case if there are unrevisable objects in the list, will appear at the bottom of the list for ascending order and at the top of the list for descending order.

The number indicator over the sort button indicates how many fields are being sorted on.

Filtering

One or more fields can be filtered with different parameters, which allows you to quickly locate the tasks that require special attention. For example, you may want to filter tasks based on those that are assigned to you, tasks with a priority status, or those with the most urgent deadline.

To add a filter to a perspective, select Filter from the toolbar.



1. In the filter menu that appears, browse or search for the desired field.
2. Specify the filter logic by selecting "Contains," "Does not contain," "Is," or "Is not."
3. Enter text to filter on.

As an example, if you select the field "Name" and the logic "Contains," then enter "Boots," the perspective will only show products that contain "Boots" in the "Name" field.

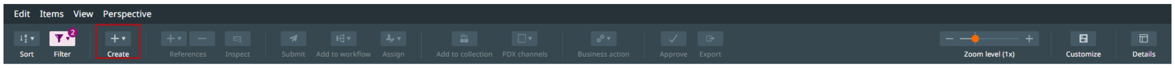
If you are filtering on multiple fields, an additional "And/Or" dropdown appears to the left of the second filter from the top. Selecting "And" forces the perspective to show only those products to which all filters apply, while "Or" will show products to which at least one of the filters applies. Filtering with "Or" works best in conjunction with Assignee, State, Workflow, and StatusFlag, while "And" should be used for all other filter combinations.

Note: "And" and "Or" cannot be used in combination.

The number indicator over the filter button indicates how many criteria have been applied.

Creating and Initiating a New Object within the Tasks Perspective

Instrument allows users to create a new object and initiate that object into a workflow using the 'Create' button from within a Tasks perspective. The object can be edited immediately, directly from the Tasks perspective in which the object was created. Review the Create Toolbar Button Setup topic to review the setup required to use this button.

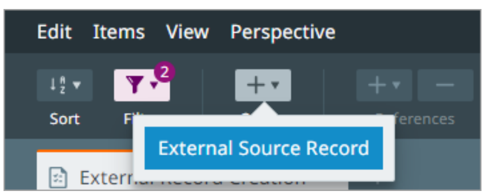


The 'Create' button will be disabled if any of the following scenarios are true:

- One or more objects are selected within the table.
- The details view is selected to view the objects.
- The Tasks perspective filter does not include a workflow defined in the any of the 'object creation' actions in the Configuration tool. For additional information, refer to the Configuration Tool Actions topic.
- User does not have privileges to create objects with the object type defined in the 'object creation' actions.

Using the Create Button

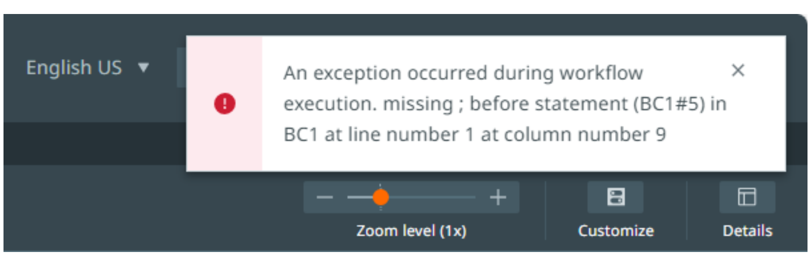
After clicking on the 'Create' button, the relevant object types will be listed in the dropdown. Relevant object types include object types that have an 'object creation' action that includes the same workflow defined for the Tasks perspective.



The objects created using the 'Create' button will immediately be shown below in the Tasks perspective. The columns can be populated by directly typing into each cell or selecting and dragging from another populated cell within the same column.

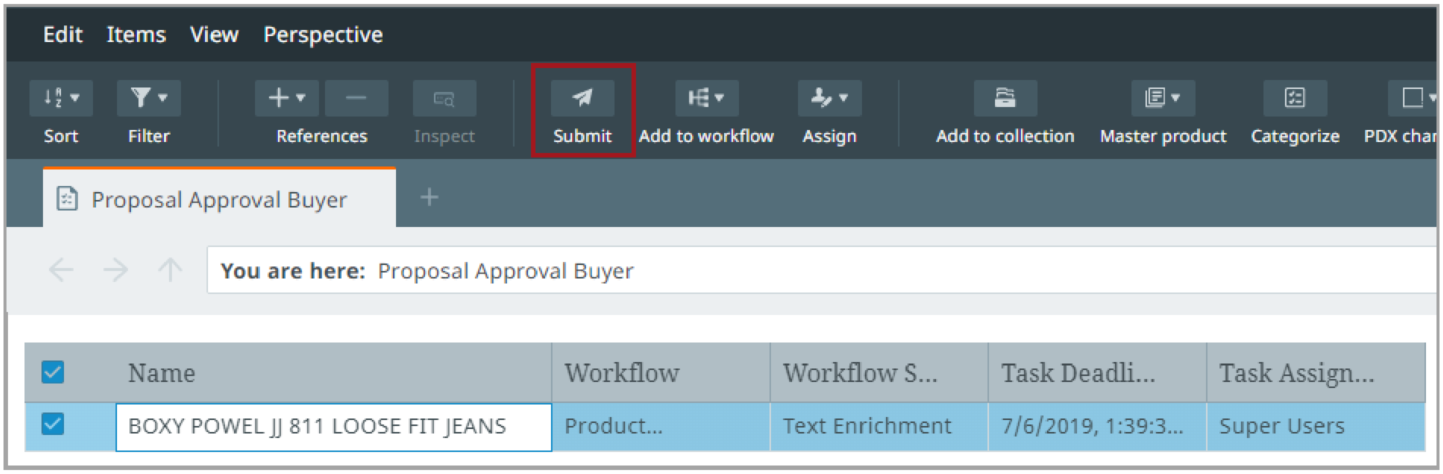
Workflow Execution Exception

The 'Create' button allows the user to both create an object and initiate it into a workflow. If the workflow has any trouble initiating any of the new objects for any reason, 'an exception occurred during workflow execution' message will be displayed, and not only will the object not be initiated into the workflow, but the object will not even be created.

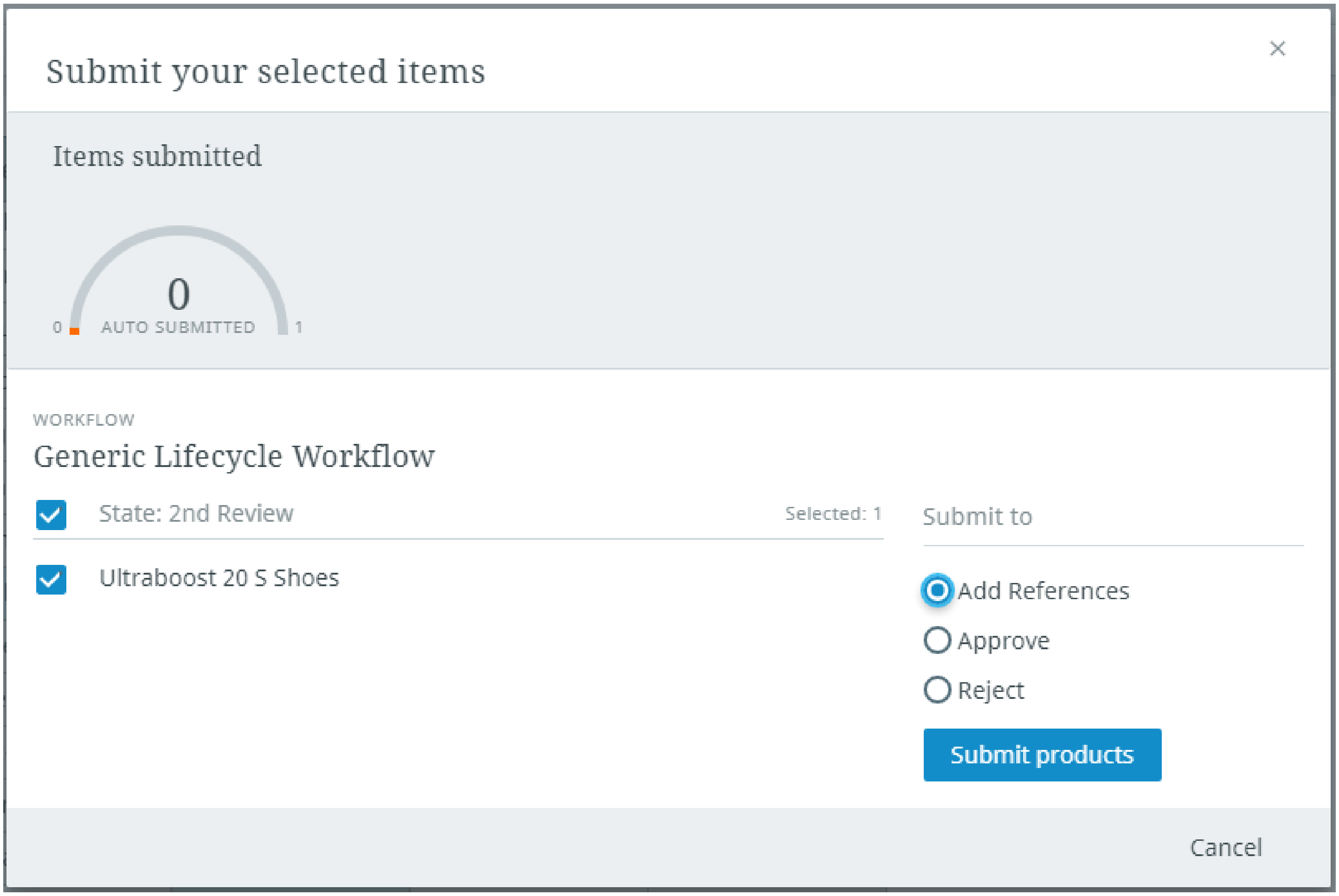


Submitting Tasks

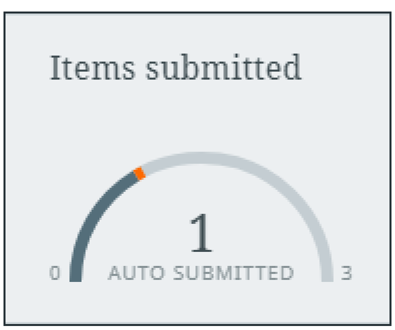
To submit tasks, select a single task or multiple tasks from a Tasks perspective and click the Submit button.



Tasks that are in a workflow state with only one transition (or several transitions with the same name) are immediately submitted when the user selects “Submit” in the toolbar. However, if several unique transitions are available for the task(s), the submission menu appears, prompting you to select which state(s) to submit the task(s) to.



The submission gauge informs you how many total items have been submitted (the number on the right-hand side of the gauge) and how many of those items automatically passed into the next state(s) of the workflow (the number above the words "AUTO SUBMITTED"). Using the below image as an example, one product automatically passed to the next state of the workflow out of a total of three.

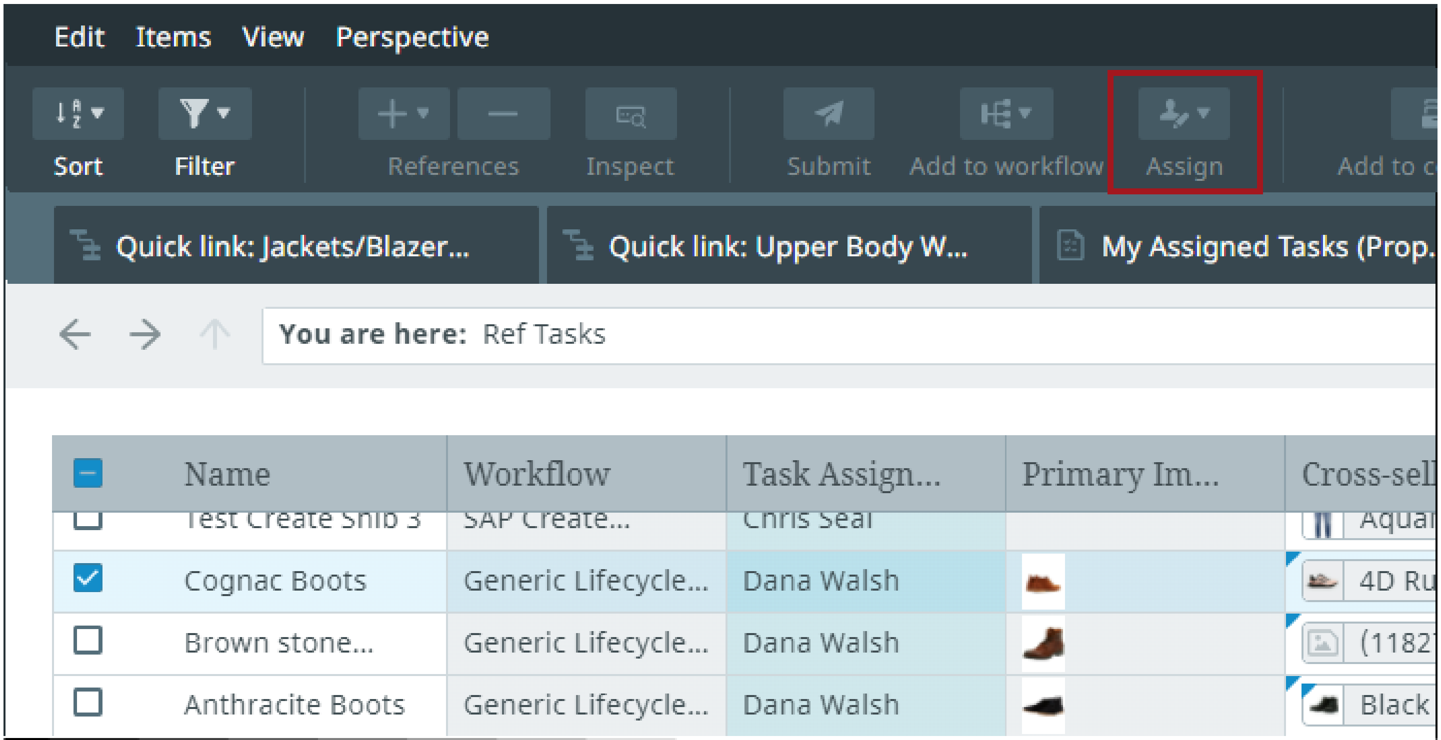


If all is well and you submitted the task(s), a confirmation message will display once the task has moved to the next state(s). However, if there are outstanding issues with the task that need to be addressed, you will be prevented from submitting them and an error message will display.


1 tasks not submitted

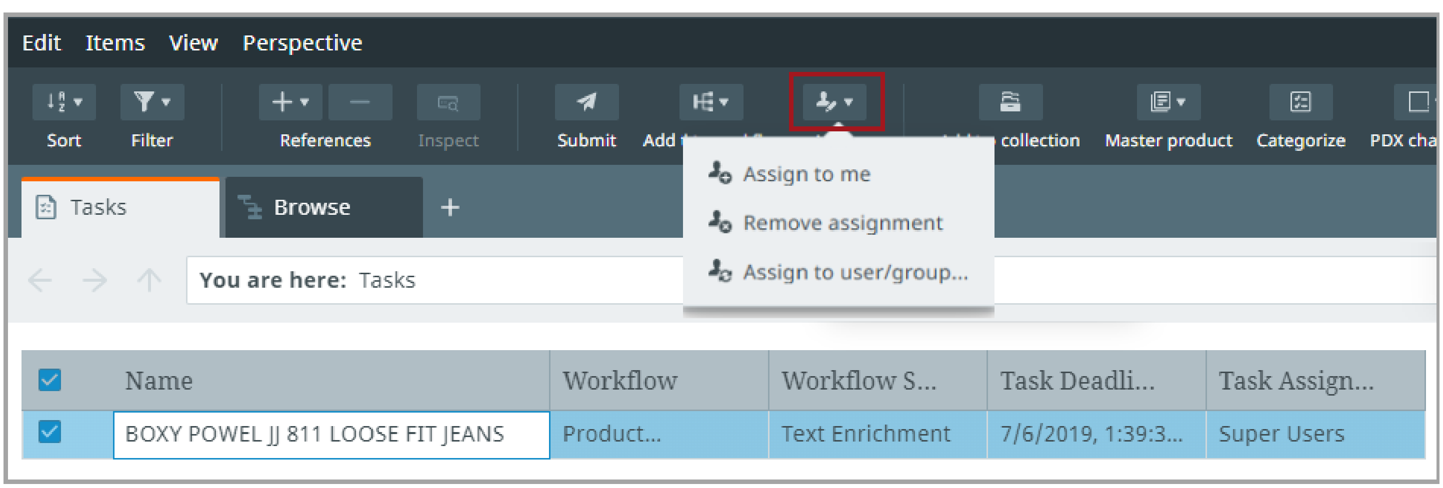
Assigning Tasks

You can use the Assign button to assign a task to yourself or others, remove an assignment, or assign a task to a group. To assign tasks, select one or multiple tasks from a Tasks perspective and click the Assign button.



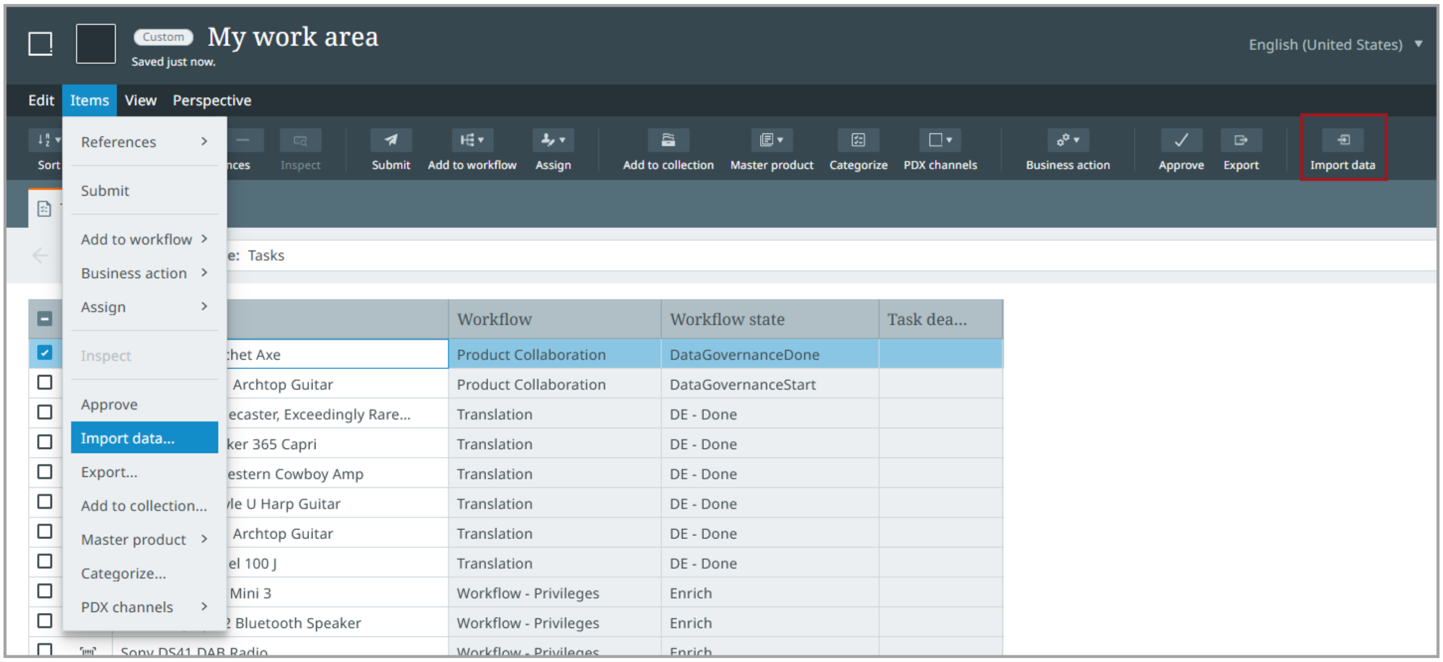
A context menu displays, allowing you to select how to change the task's assignments.

- Selecting Assign to me will assign the task(s) to you
- Selecting Remove assignment will remove the assignee from the task
- Selecting Assign to user/group will open up an assignment menu where you can select a user or group



Importing Data

From within a perspective, you can import data using the "Import data" options available from the toolbar and the Items menu:



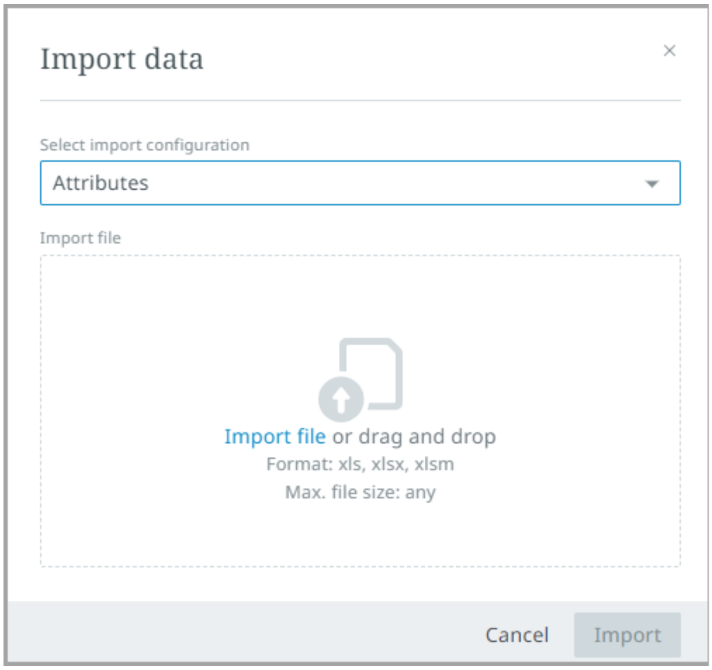
Additionally, for onboarding new products or editing existing ones, using a template configuration, you can import data from a Smartsheet using the same import method—no additional configuration within Instrument is required. For more information regarding Smartsheets, they are explained in detail within the Excel Smartsheet Format section of the Data Exchange documentation.

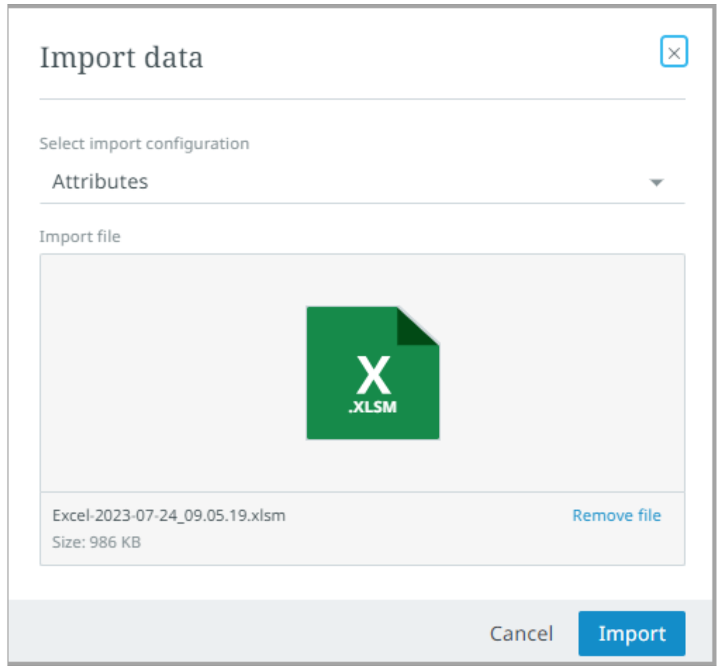
Importing Steps

Select an import configuration that you have previously set up in the STEP Workbench. For importing Smartsheets, refer to the Smartsheet Import Configurations topic in the Data Exchange documentation to learn more about Smartsheet templates.

Configurations are searched and accessed using the "Select import configuration" dropdown. Recently used configurations (for example, Attributes—as shown below) will display in the dropdown.

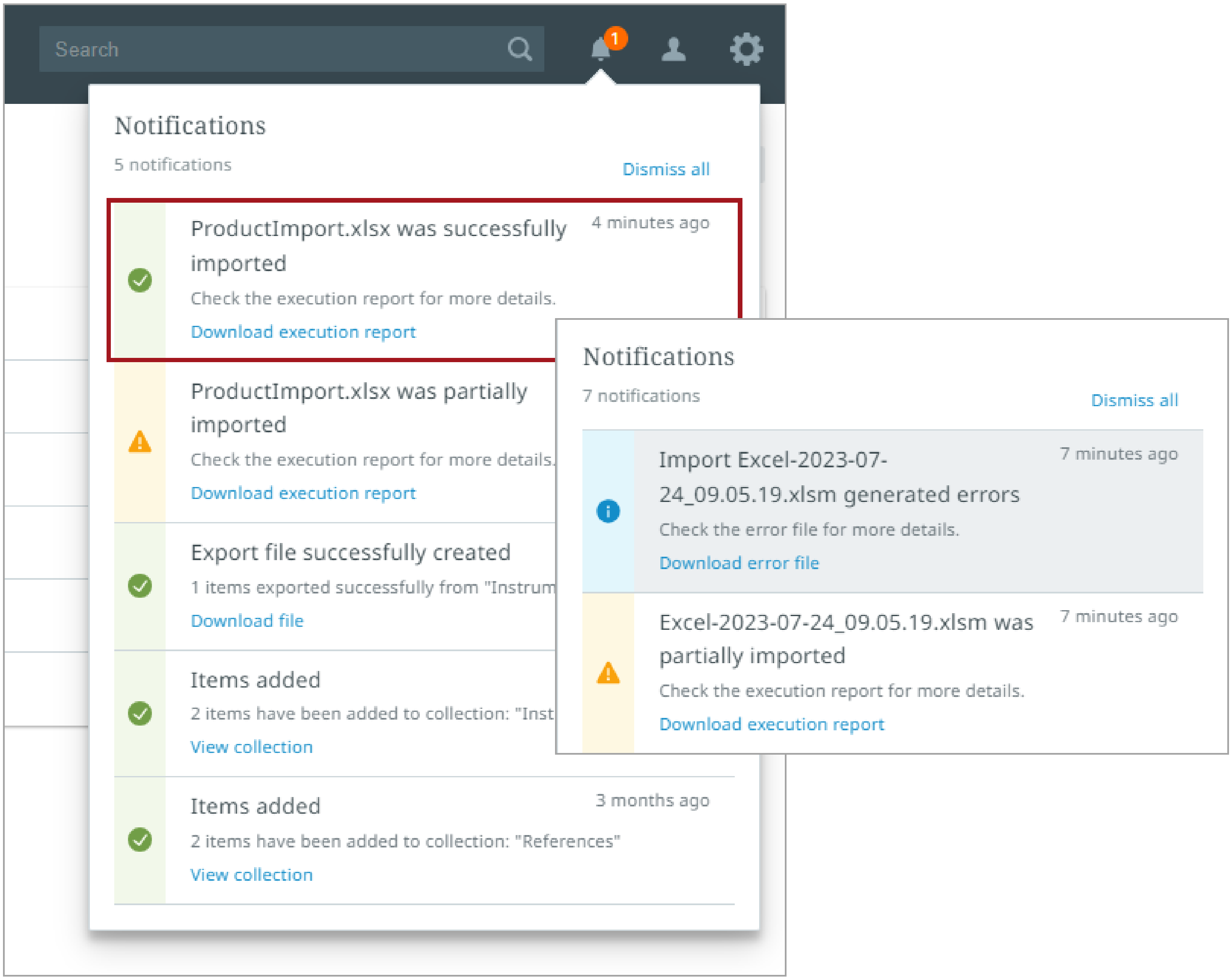
Important: If a Smartsheet is uploaded that contains an import configuration, it will override the user selected import configuration.





Note: Hidden rows will be skipped upon import when importing Smartsheets. No configuration is needed.

Once the file is selected and you select "Import," the import is sent to a background process that is listed in the notification center along with any generated error files or other notifications that show actionable feedback. For example, to view the background process, click the "Download execution report" link at the bottom of the import listing to open the "Background processes ‣ Importer" page to view more details, or click "Download error file" to identify issues (examples shown below).


Search
1
Notifications
5 notifications
Dismiss all
ProductImport.xlsx was successfully imported
4 minutes ago
Check the execution report for more details.
Download execution report
ProductImport.xlsx was partially imported
Check the execution report for more details.
Download execution report
Export file successfully created
1 items exported successfully from "Instrum
Download file
Items added
2 items have been added to collection: "Inst
View collection
Items added
3 months ago
2 items have been added to collection: "References"
View collection
Notifications
7 notifications
Dismiss all
Import Excel-2023-07-24_09.05.19.xlsm generated errors
7 minutes ago
Check the error file for more details.
Download error file
Excel-2023-07-24_09.05.19.xlsm was partially imported
7 minutes ago
Check the execution report for more details.
Download execution report

Background processes ▸ Importer

Import: ProductImport.xlsx by Attributes

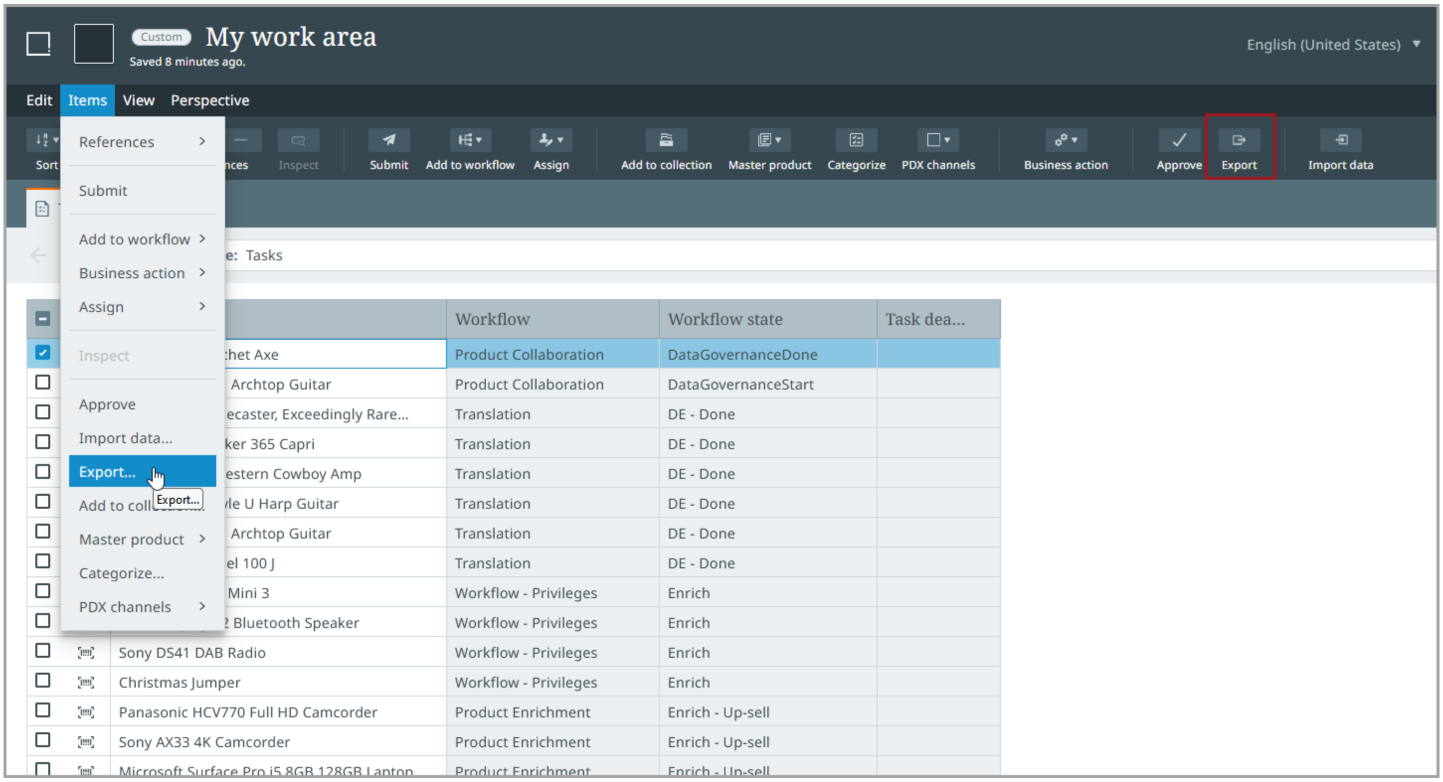
Created by: 2023-06-07 01:45:55

ID	BGP_3186455
Status	Succeeded
Progress	100%
Execution server	instrument.stibo.com
Started	2023-06-07 01:45:59
Finished	2023-06-07 01:45:59
Elapsed	0 s
Time in queue	4 s
# of warnings	0
# of errors	0

Type	Description
Info	Retrieval started (Wed Jun 07 01:45:59 CEST 2023)
Info	Retrieved 8668 bytes (Wed Jun 07 01:45:59 CEST 2023)
Info	Conversion started (Wed Jun 07 01:45:59 CEST 2023)
Info	Converted 2 objects (Wed Jun 07 01:45:59 CEST 2023)
Info	Logged on
Info	Mapping started (Wed Jun 07 01:45:59 CEST 2023)
Info	Mapping completed (Wed Jun 07 01:45:59 CEST 2023)

Exporting Data

From within a perspective, you can export data using the "Export" options available from the toolbar and the Items menu:



You can also export a Smartsheet template using the same method—no additional configuration required. For more information regarding Smartsheets, they are explained in detail within the Excel Smartsheet Format section of the Data Exchange documentation.

Exporting Steps

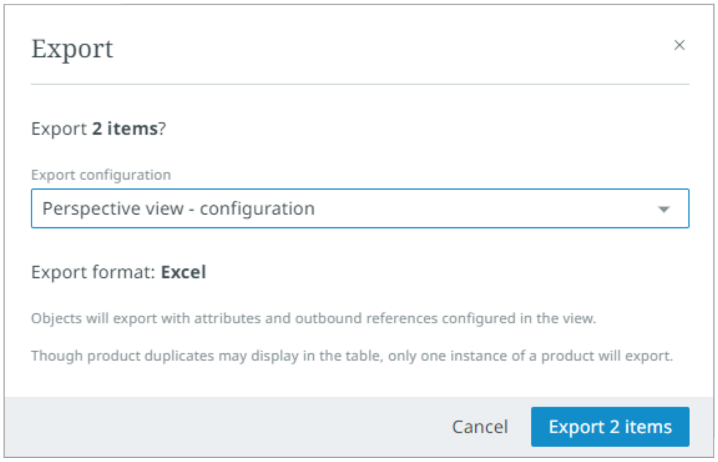
Select one or more items from the table noting the information below:

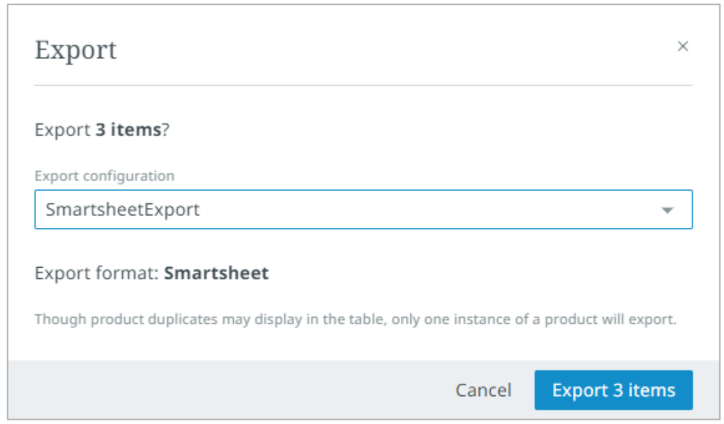
Note: Server-side actions (those that run as a background process) within the perspectives work with the following selection maximums:

- Individual selections (single or multiple)—up to 500 items
- Select All—up to 100,000 items

Next, select an export configuration that you have previously set up in STEP Workbench. For example, before a Smartsheet can be downloaded and edited, a Smartsheet data export or template configuration must be created in the Export Manager. Refer to the Smartsheet Data and Template Configurations topic in the Data Exchange documentation.

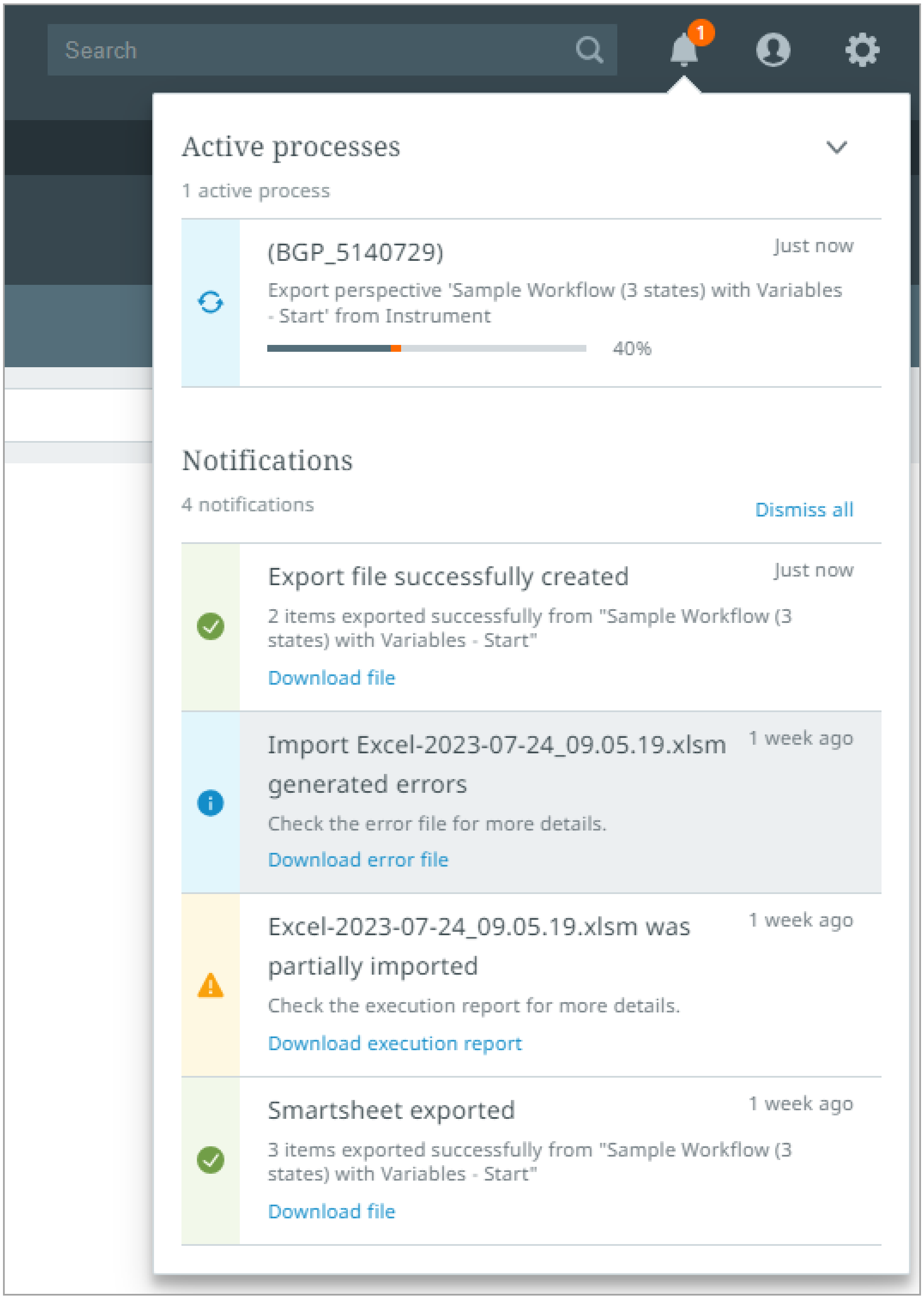
Recently used configurations (shown below) will display in the dropdown. Once a selection has been made, click the Export button from the toolbar. The context you are in is the default that will be used when exporting data.





The export is sent to a background process where it is listed in the notification center.

When the export is done, click the "Download file" link at the bottom of the export listing to open the export file with the exported data.



If you are a member of multiple supplier groups and exporting to a Smartsheet, a dropdown is automatically enabled within the Smartsheet that allows you to choose the supplier.

Approving Data

The data in STEP is logically divided into two workspaces: 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 publishing.

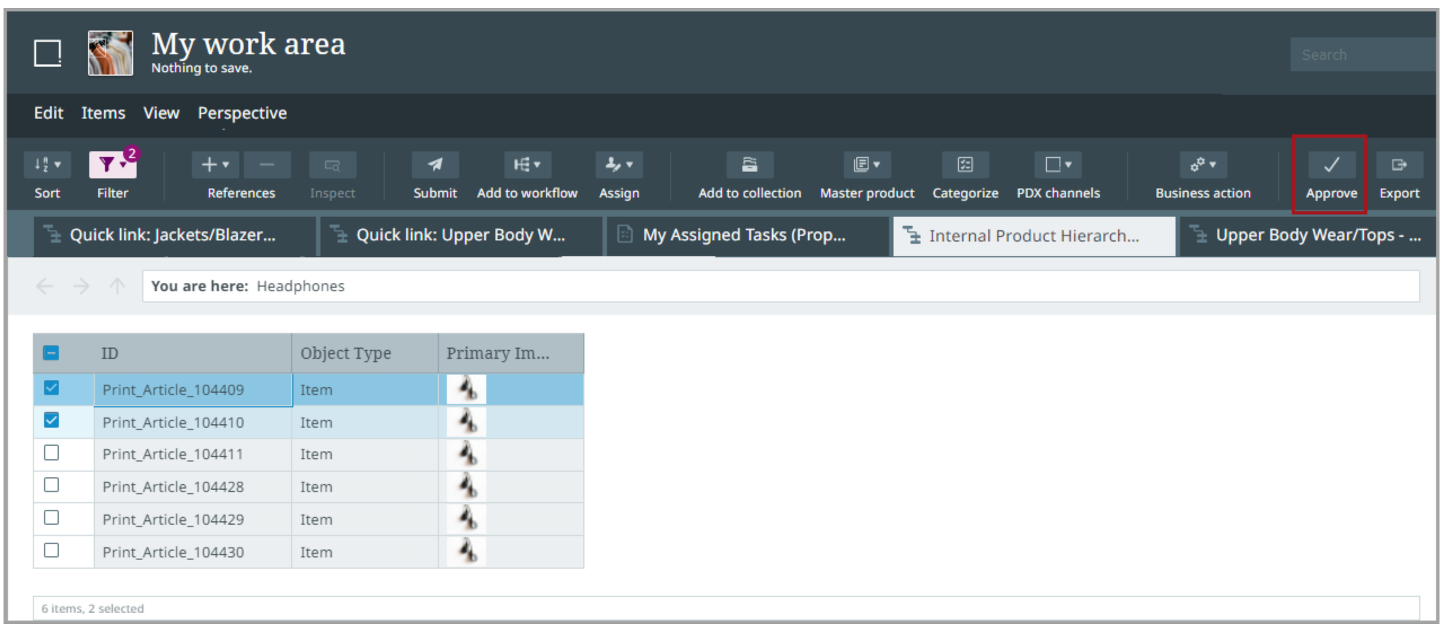
You may need to review products (for attribution or categorization in a product hierarchy, for example), and approve products or changes to products once all the product data looks accurate. In a typical setup, data from the approved workspace is made available to downstream systems.

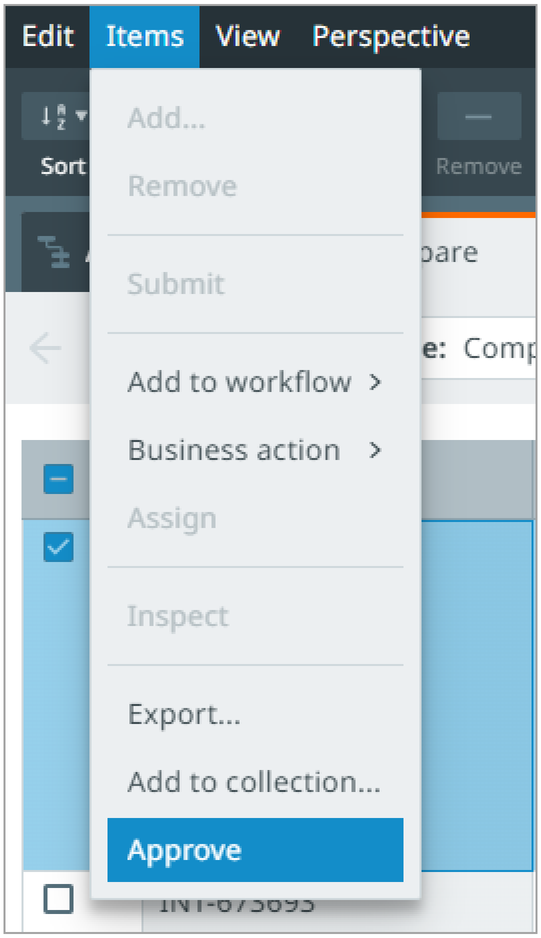
Data cannot be edited directly in the approved workspace. Instead, data is reflected in the workspace via an operation called approval. Approvals can be carried out manually by a user (as described in this topic) or programmatically by a business rule. Refer to the Approval of Objects topic for more information about the approval of objects.

Note: Server-side actions (those that run as a background process) within the perspectives work with the following selection maximums:

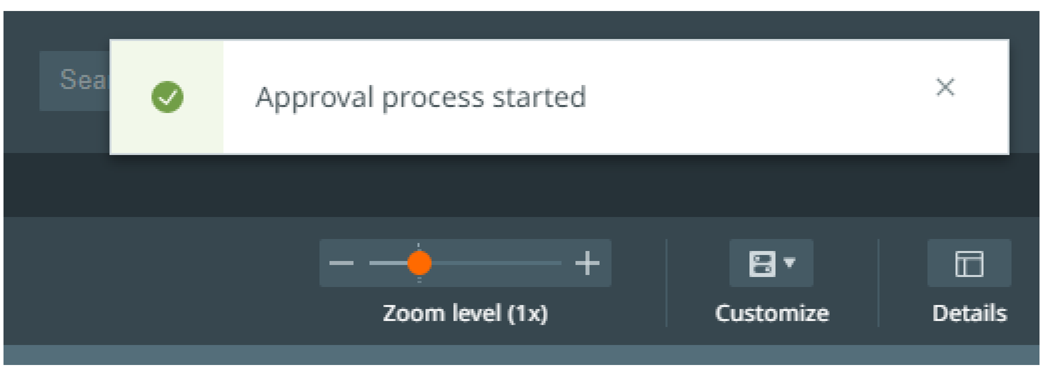
- Individual selections (single or multiple)–up to 500 items
- Select All–up to 100,000 items

Selecting one or more items in the hierarchy or table within a task or collection enables the "Approve" button on the toolbar and the "Approve" option in the Items menu. Both are shown below:

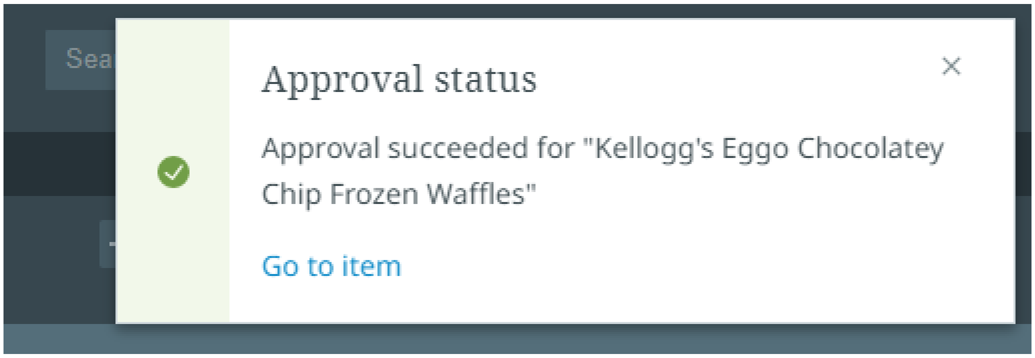


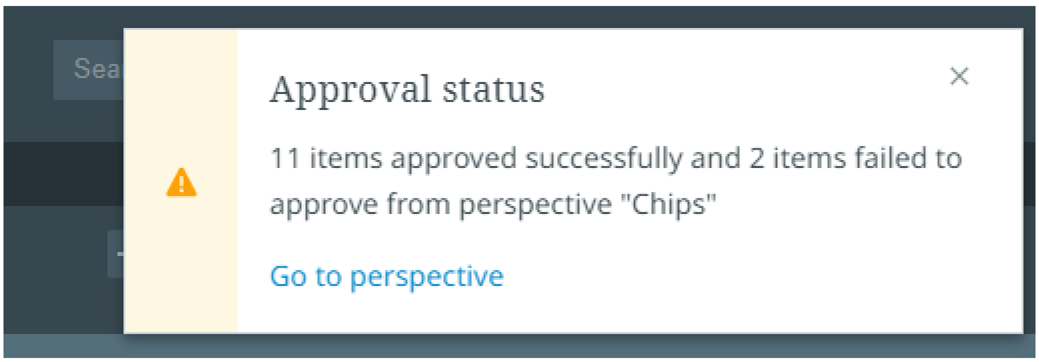


When an approval is submitted, notification is provided:

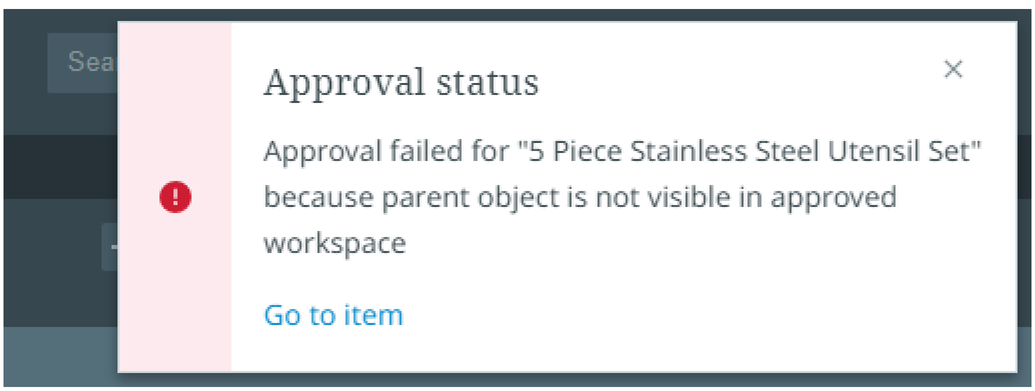


A status is provided via a pop-up notification and will be in the notification center. The link provided in the notifications will take you back to the item or the perspective (as shown below):





In case of issues, a meaningful error displays when you approve a product. For example, if you do not to have the privilege to approve the product(s), you will receive a missing privileges message in a pop-up notification or within the notification center once the approval process starts. Another example of an error message is shown below:



PDX Channels Setup

Instrument allows users to view, add, and remove PDX channels for one or more products in a perspective table view. This enables you to easily check if products are assigned to the desired PDX channels. If the products have not been assigned to the desired PDX channels, you can add or remove PDX channels to ensure that products will be syndicated to the correct receivers via PDX.

Furthermore, the PDX channel solution in Instrument supports business processes to be executed before the actual syndication to PDX takes place. This is triggered via a business action that will run when channels are either added or removed. The business action could, for example, initiate the selected products into a STEP workflow or do data quality checks and then ultimately ensure that the products get sent to PDX. Once the products are received by PDX, configured channel assignment rules will ensure that the products are assigned to the desired channels. Assignment rules must be configured in PDX.

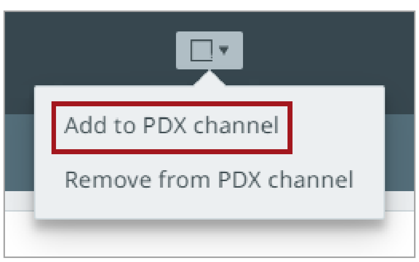
To use the PDX channel functionality, a PDX Inbound Integration Endpoint and a PDX Outbound Integration Endpoint must be set up, and users must have the Product Data Exchange Syndication commercial license enabled. For more information on PDX, refer to the PDX Syndication section of the Data Integration documentation.

Adding a PDX Channel

To add a PDX channel to a product:

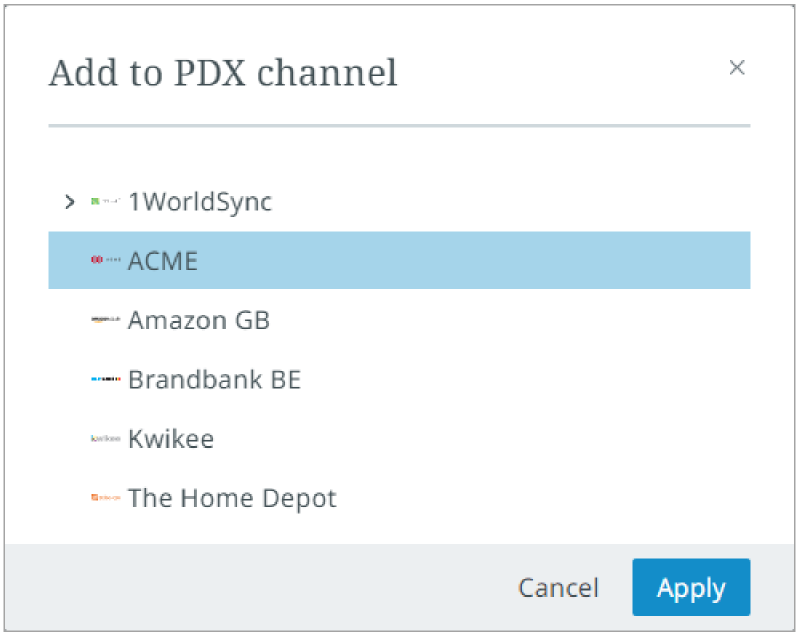
1. Select one or more products in the table. After a product has been selected, the PDX channels button on the toolbar will be enabled.

2. Click the PDX channels button.
3. Select "Add to PDX channel." A dialog listing available PDX channels will display.

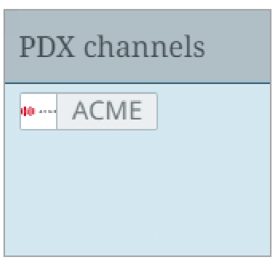


> **Note:** PDX channels are available according to the current user. Channels may differ based upon the PDX channels available to each user.

4. Select the appropriate PDX channel. After selecting the channel, the "Apply" button will become enabled.



5. Click "Apply" to add the product to the selected PDX channel. A notification will display in the upper-right corner of the screen stating, "Background process to update PDX channels has started." When the background process has finished, another notification will display stating, "PDX channels were updated." To add more channels, repeat steps 4 and 5 as needed.



> **Note:** When a channel has been added or removed, a business action will run. The type of business action triggered (quality check, workflow, etc.) is set by the user. Business actions must be set up in STEP Workbench. For more information on business actions, refer to Business Actions section of the Business Rules documentation.

Removing a PDX Channel

To remove a PDX channel:

1. Select one or more products from the product table.
2. Click the "PDX channels" button in the toolbar.
3. Select "Remove from PDX channel".
4. When the PDX dialog list displays, select the channel to be removed.

5. Click "Apply." A notification displays in the upper-right corner of the screen stating, "Background process to update PDX channels has started." Once the background process has finished, another notification displays stating, "PDX channels were updated." The channel status then changes to "Waiting to be removed". When the cursor hovers over the channel, a message displays stating, "Channel marked for removal."

   Note: The channel displays until channel removal confirmation has been received by STEP from PDX.

   If an error notification displays in the upper-right corner, click the "Go to perspective" link inside the message. The table displays a red marker next to the product with the error. Hover the mouse over the marker to display the error message. Your system administrator must make appropriate updates in STEP to fix the error.

Available PDX Table Columns

PDX table columns can display in bulk view for product managers to review channel statuses across multiple products in a table. This displays a single view for users to review when products have been syndicated successfully, added or removed from a channel, as well as other PDX channel status updates.

The two types of columns are:

1. PDX Channels: this column shows all the elected channels for a product. Each channel is displayed with a chip.
2. Individual status columns: These columns are used to select a status column for a specific channel. Once selected, the column displays the status for a product in the channel.

You can also add and change channel columns using the Customize view option. Admin can add the columns using the Configuration tool.

PDX Channel Status

When the mouse hovers over a channel, the status displays in a tooltip dialog. Each column in the table displays a product's channels and current statuses.

PDX Channel statuses:

- Progress: The product is missing mandatory attribute values
- Ready: All mandatory attribute values are present
- Submitted: Product sent. No response (yet)
- Rejected: Product failed pre-flight validations
- Returned: Product failed validations by the channel
- Accepted: Channel accepted the product received
- Multiple: The product has multiple statuses depending on the receiver
- Fetching: Fetching the retailer’s version of the product record
- Waiting to be added to channel: The product has been added to a channel in Instrument, but is waiting to be added in PDX.
- Waiting to be removed from channel: The product has been removed from a Channel in Instrument, but is awaiting the removal in PDX.

ACME	Amazon GB	Brandbank...	Kwikee
Submitted	Waiting to be added to channel	Ready	Fetching
Accepted	Waiting to be removed from cha...	Multiple	Waiting t...
Rejected	Waiting to be removed from cha...	Progress	Returned
Accepted	Returned		

Each status displays with a specific icon, shown in the above example.

Important: You should never manually manipulate PDX data containers in STEP. Doing so could result in functionality errors for both PDX and Instrument.

Executed Business Rules After Adding and Removing Channels

Once you make a change to the target channel list for a product (adding or removing channels), a business rule will run. This allows customers to customize actions triggered. For example, this could be a business rule that triggers a STEP workflow where data quality checks and additional data maintenance can be conducted. The ID of the business action must be configured via the below properties:

- PDX.BusinessAction.AddChannels=
- PDX.BusinessAction.RemoveChannels=

Note: For SaaS systems, properties are set within the Self-Service UI by going to the Configuration Properties tab for your environment. Some changes may require you to restart the server and/or user interface (i.e., the workbench) before they take effect. If the properties you need are not shown, submit an issue within the Stibo Systems Service Portal to complete the configuration.

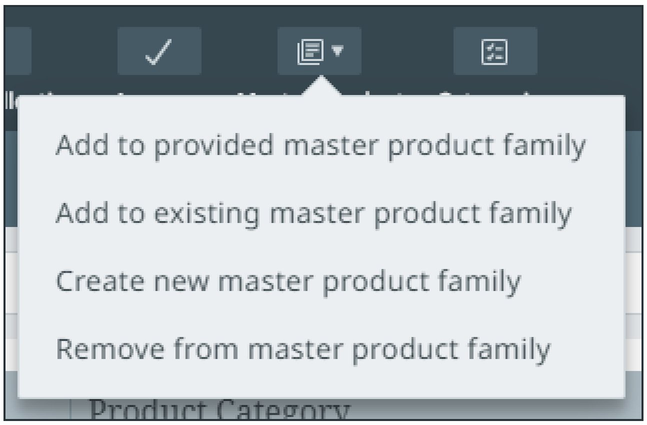
The purpose of business actions is to ensure that desired business processes (like running workflows and performing data quality checks) are executed. Also, the business action allows updates to an attribute with the added / deleted channels. Having such an attribute on products is helpful for users to utilize the channel assignment rules in PDX. The attribute must be added to the products separately and must also be syndicated to PDX. After syndication, the PDX channel assignment rules must be configured to use the attribute.

Important: The actual export of the product data to PDX via the PDX Outbound Integration Endpoint can be triggered via creating a derived event or an approve event.

Managing Master Products

Available for implementations that also make use of the Accelerator for Retail solution, the Master Product button allows users to add products to or remove products from a designated master product. The actions provided by this button include:

- **Add to provided master product family** - This action adds the selected product(s) to a master product family provided by a pre-configured attribute.
- **Add to existing master product family** - This action adds the selected product(s) to a master product family that you choose.
- **Create new master product family** - This action creates a new master product family and automatically adds the product(s) you have selected to it.
- **Remove from master product family** - This action removes the selected product(s) from their master product family.

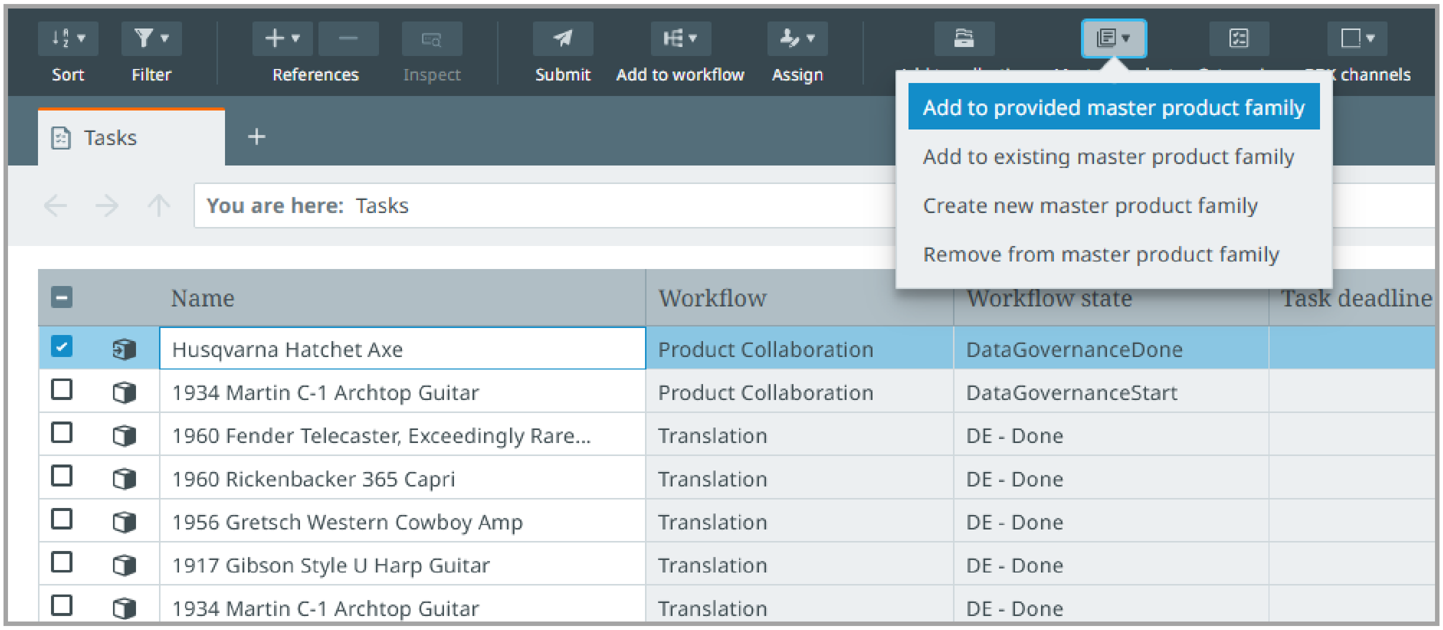


Note: The master product ID attribute, as well as the business actions that drive this functionality, are provided through the Accelerator for Retail package.

Important: These actions support the Accelerator for Retail solution, and are therefore only available for internal source records that are currently in the Internal Record Creation workflow.

Add to Provided Master Product Family

If the product that you want to add to a master product already has the master product ID mapped as an attribute, you can use the "Add to provided master product family" action. When applied, the system will check for an existing master product with the specified ID, and if one does not exist, it will create a new master product. In either case, the selected product will become a variant of that master product.



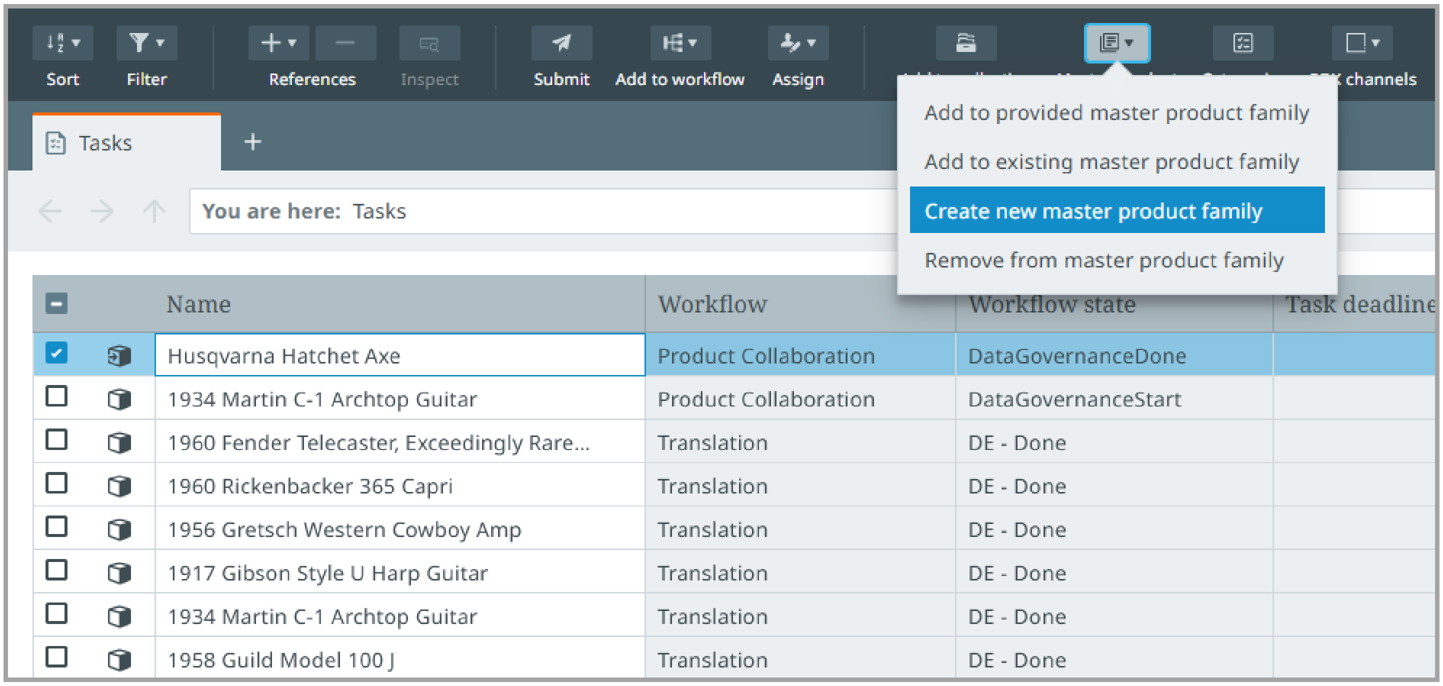
Add to Existing Master Product Family

If the product that you want to add to a master product family does not already have a master product ID mapped, you can use the "Add to existing master product family" action. Once selected, a item picker will appear prompting you to choose a master product family to add the product to.

If adding multiple products at once, the selected master product must be in the same product category as all of the products you wish to add as variants.

Create New Master Product Family

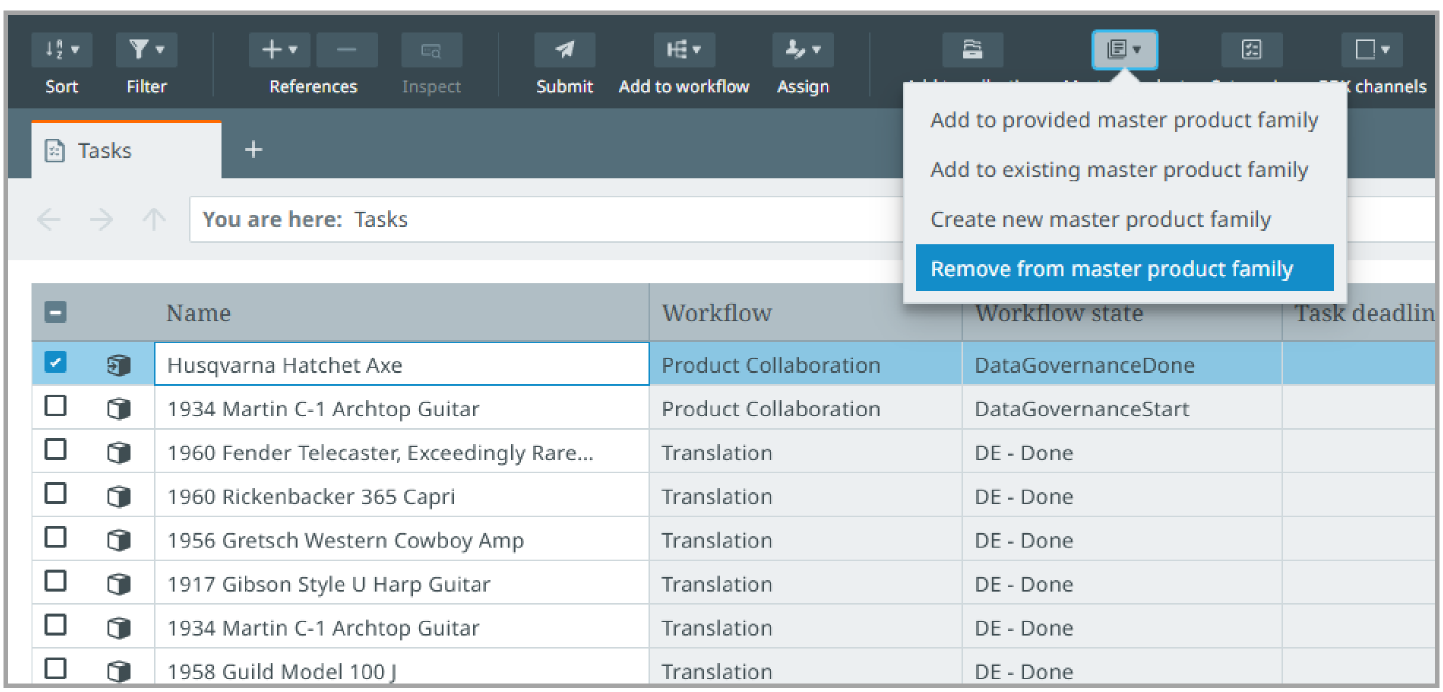
If you need to create an entirely new master product family, you can do so by selecting one or more relevant products and clicking the "Create new master product family" action. When applied, a new master product family will be created and the system will automatically add the selected product(s) to it.



If adding multiple products at once, the newly created master product must be in the same product category as all of the products you wish to add as variants.

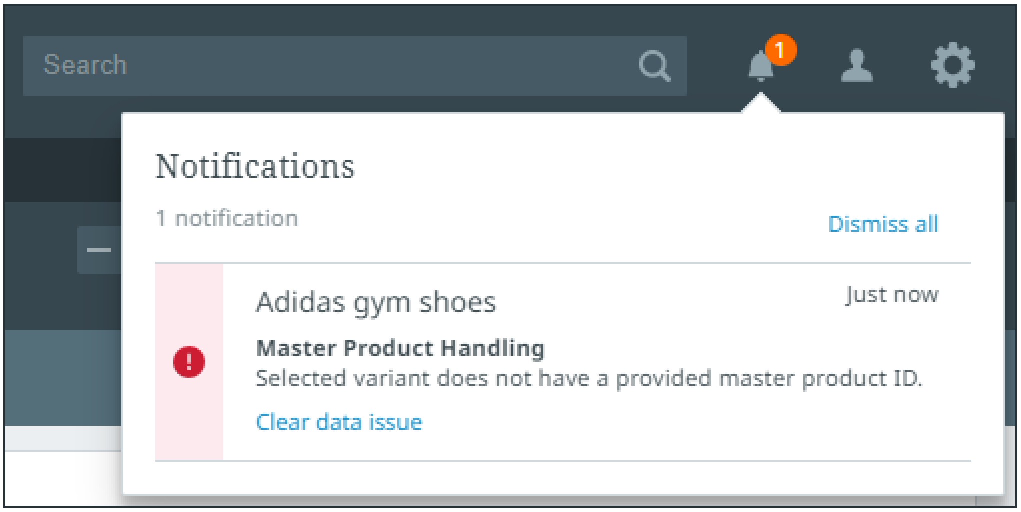
Remove From Master Product Family

If you need to remove a product from a master product family, select the desired product and click the "Remove from master product family" action.



Error Handling

Errors related to these actions will appear in the notification center. However, unlike other errors you may encounter, errors resulting from these actions can be hidden from the interface by clicking the "Clear data issue" text.

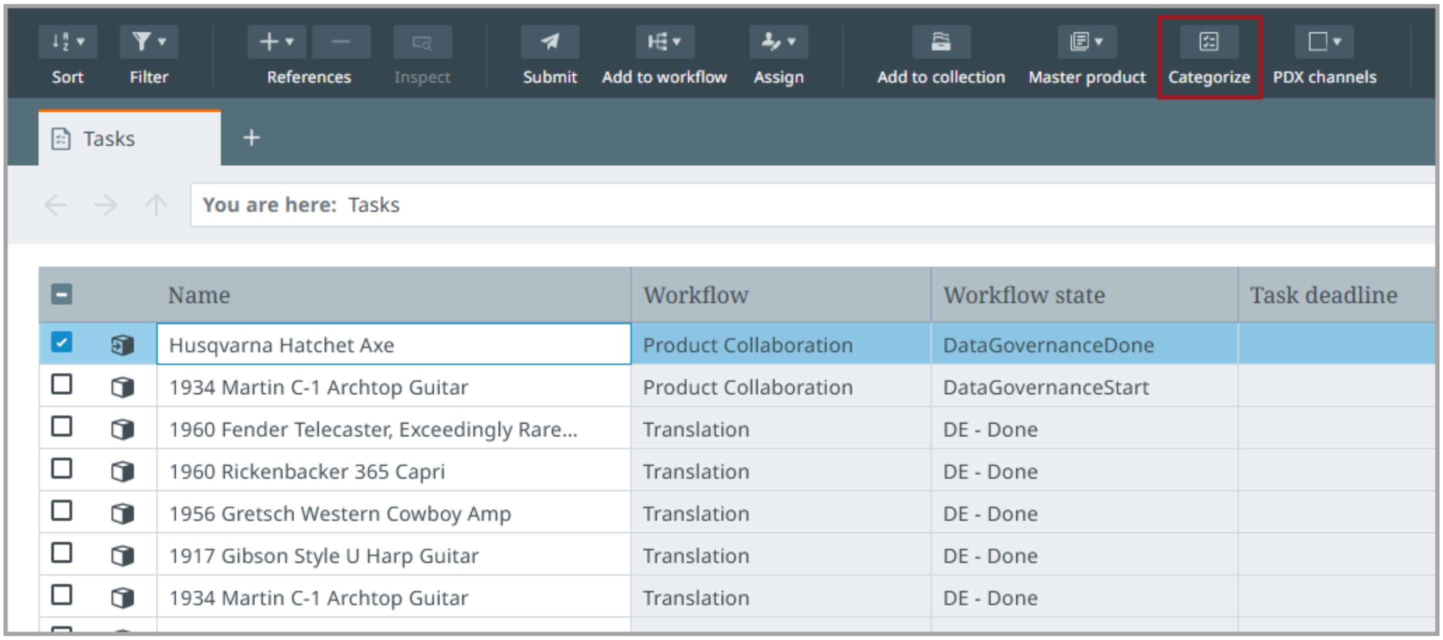


For more information, refer to the Utilities topic.

Categorizing Objects

Available for implementations that also make use of the Accelerator for Retail solution, the Categorize button enables users to move objects from one place to another.

To move objects from where they reside to a new location, select the object(s) in either the Tasks, Collections, or Browse perspectives and click the Categorize button from the toolbar.



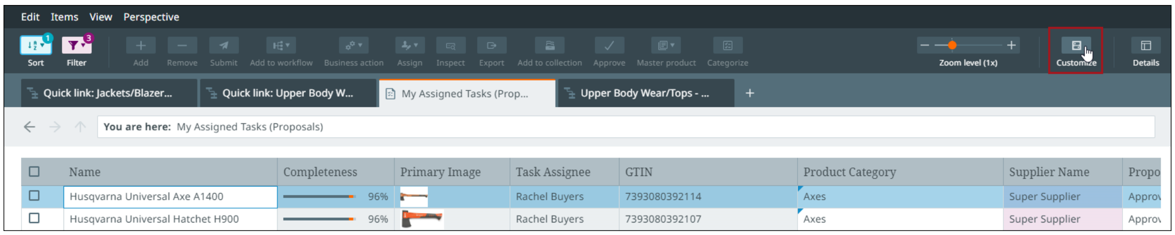
Next, using the item picker that displays, select the new desired location in the hierarchy. Once the selections are confirmed in the item picker dialog, the product(s) will move to the designated location.

Customizing Columns

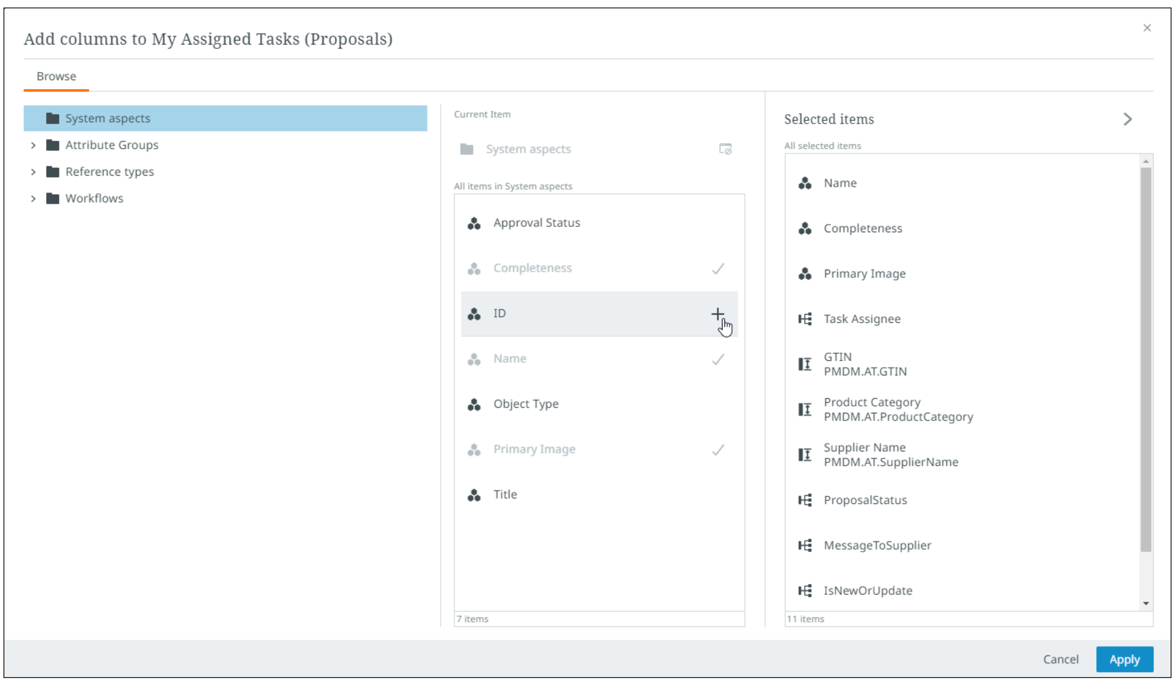
There are several ways to customize table columns in table-based perspectives like Tasks or Collections. Using a variety of methods, users can adjust their view of data in a table by adding, removing, reordering, resizing, and hiding columns.

Adding and Removing Columns

Options to add and remove columns can be found by clicking the Customize button on the toolbar.



The item picker dialog displays, allowing you to add and remove columns from the table view.



For more information on the item picker, refer to the Item picker topic.

Note: The option for administrators to add target language translation statuses for Browse and Tasks perspectives can be found in the Configuring target language translation status topic in the Configuration tool documentation. For Browse and Tasks perspectives in custom work areas, users can add or remove target language translation statuses using the toolbar Customize action (Customize > Languages > Translation status).

Tabs

A wealth of information about your assets, products, and entities can be accessed by adding tabs to your perspectives. Tabs are pages of data that can be viewed via the "Details" view in any of the perspective types. Added and configured using the configuration tool, tabs can display, for example, customized information about the objects in your hierarchy, translation information, references, and asset information. The tabs available are listed and described below.

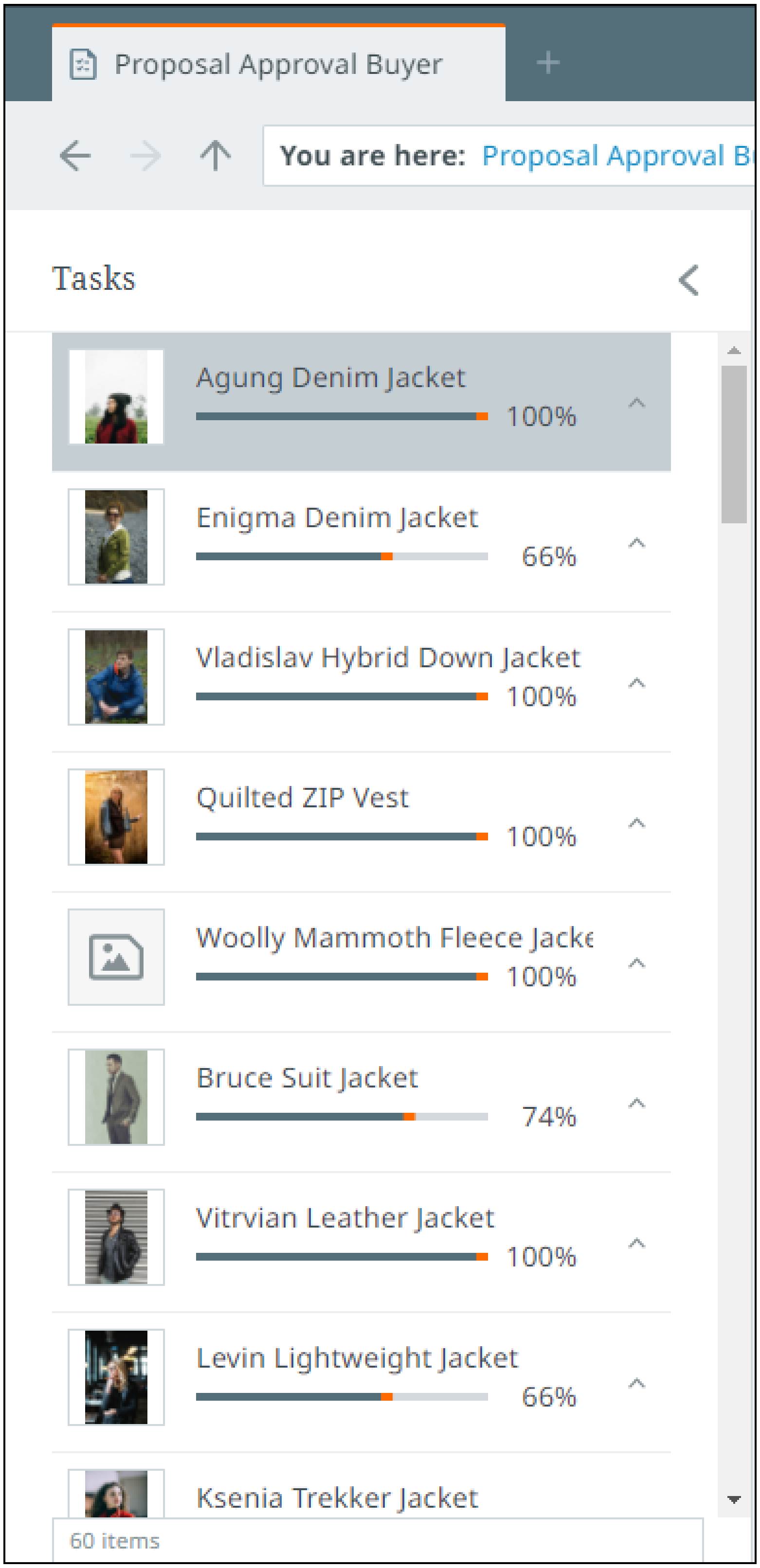
Details Tab

The details tab is divided into three primary areas: Item list pane, details pane, and section bar. In addition to viewing objects and their attributes, you can also view and manage product-to-product references from the details view.

Item List

All items within the currently selected perspective are listed in a pane on the left-hand side of the screen called the item list pane. From this pane, objects can be selected from the task list in order to view their details.

If the product has a primary image associated with it, the image will display with the name of the product. Any additional information that appears on the product card is determined by the sequence of columns in the list view.

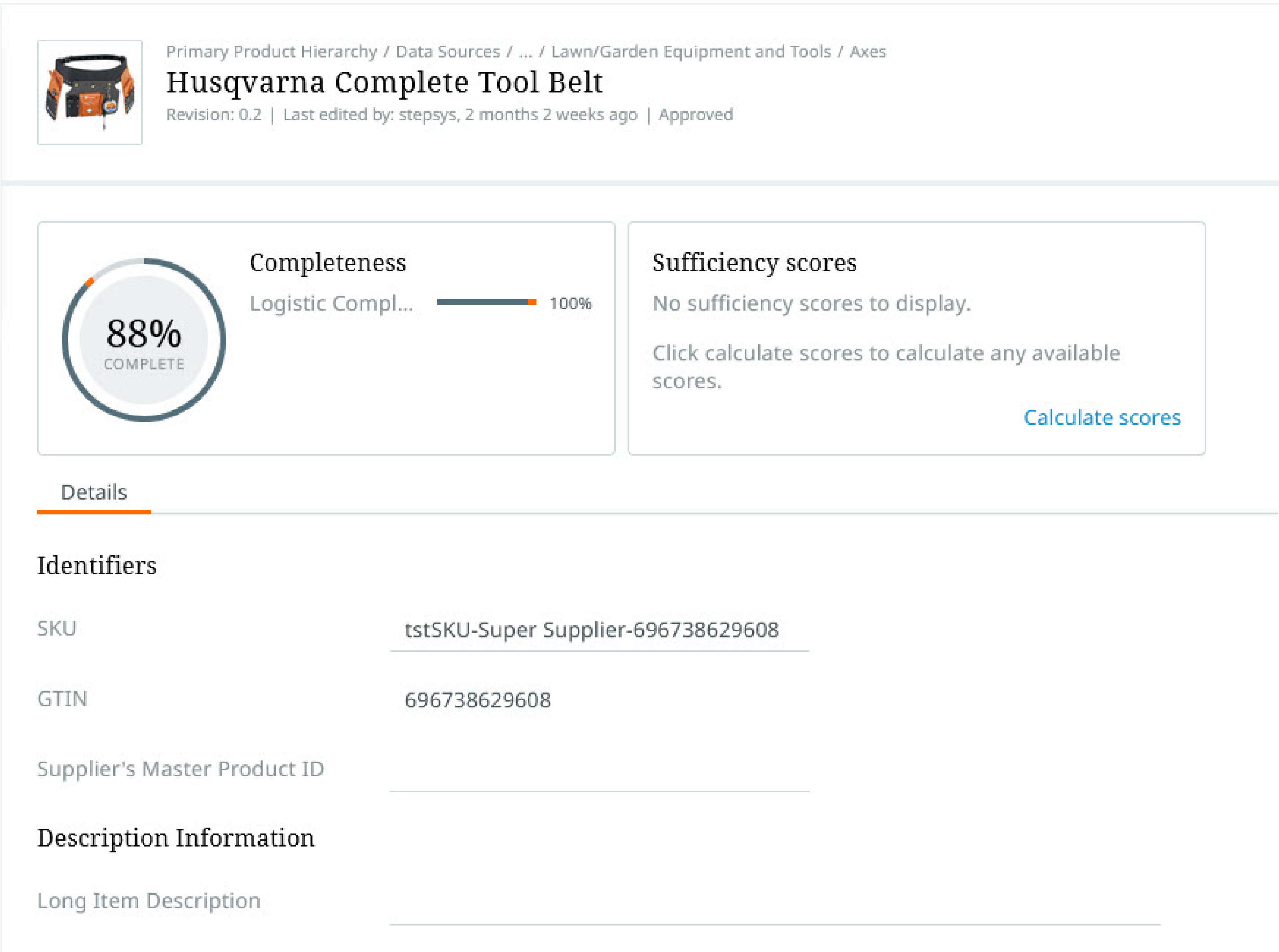

Proposal Approval Buyer
You are here: Proposal Approval B
Tasks
Agung Denim Jacket
100%
Enigma Denim Jacket
66%
Vladislav Hybrid Down Jacket
100%
Quilted ZIP Vest
100%
Woolly Mammoth Fleece Jacke
100%
Bruce Suit Jacket
74%
Vitrvian Leather Jacket
100%
Levin Lightweight Jacket
66%
Ksenia Trekker Jacket
60 items

The item list pane can also be used to perform a number of actions on a product. Select the desired product and select the relevant action from the toolbar.

You can also view and edit product-to-product references and classification links via the item list. Refer to Product references and classification links for more information.

Details Pane

The details pane is the primary focus of the details view, and displays all of a product's important details.



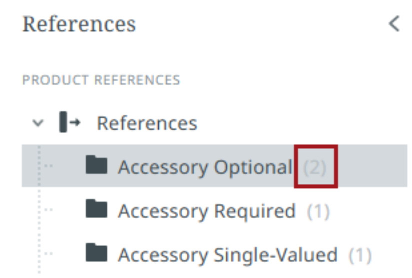
Information found within the details pane includes: attributes, attributes groups, references (provided they are in attribute groups), primary image, last edit date, Completeness card, Sufficiency scores card, and product hierarchy breadcrumbs. Attributes and references can be edited by clicking into the text field.

For your convenience, if an attribute needs your attention, you can click the applicable link to an attribute in a Completeness card, Sufficiency scores card, or in the side panel (described more below). The page will still auto-scroll to focus on the attribute in question.

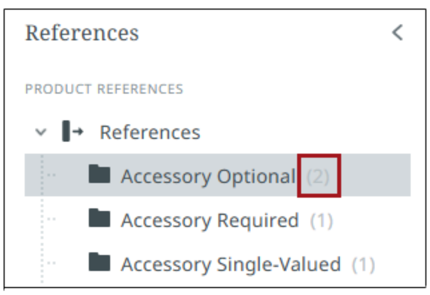
For more information, refer to Managing data.

References Tab

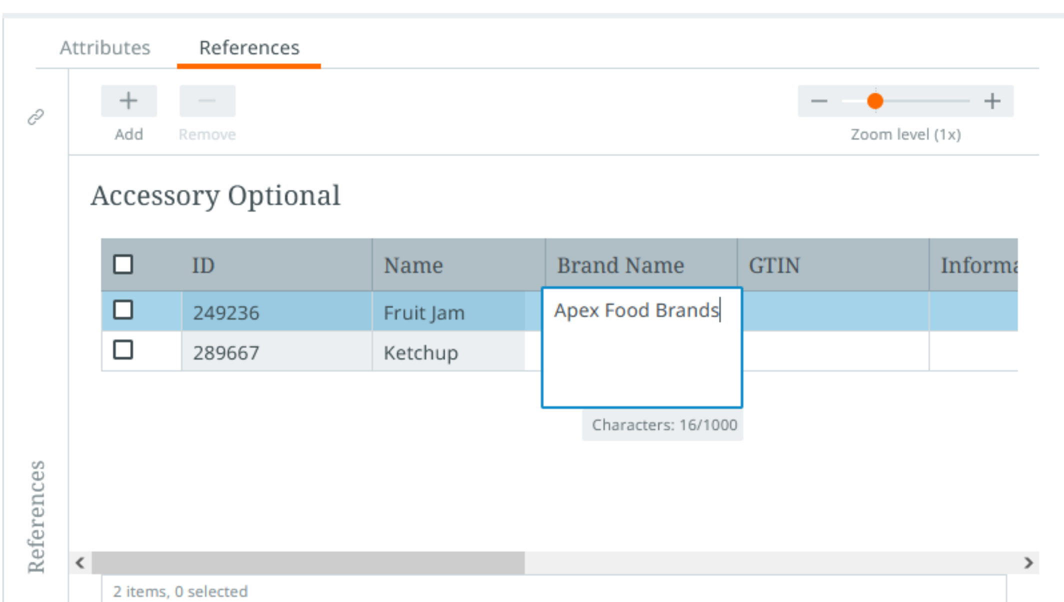
The "References" tab enables a configured view of references in the details pane. When configured, the "References" tab is split between a list of valid reference types on the left, and a tabular view of the references of the selected reference type on the right.



Each reference type containing references displays a gray numeral in parentheses (1-9) to the right of the reference type name indicating how many references there are for that reference type for that object. If there are more than 9 references, a '9+' will display.

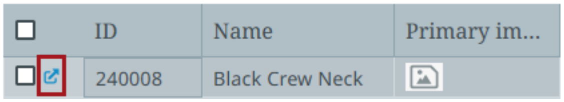


In the table that displays the references for each reference type, information on the referenced object can be edited. The buttons above the table in the secondary toolbar allow users to add new references by clicking the "Add" button and remove existing references by selecting the relevant reference and clicking the "Remove" button. A zoom slider is accessible above the table that expands table rows to display all relevant content.

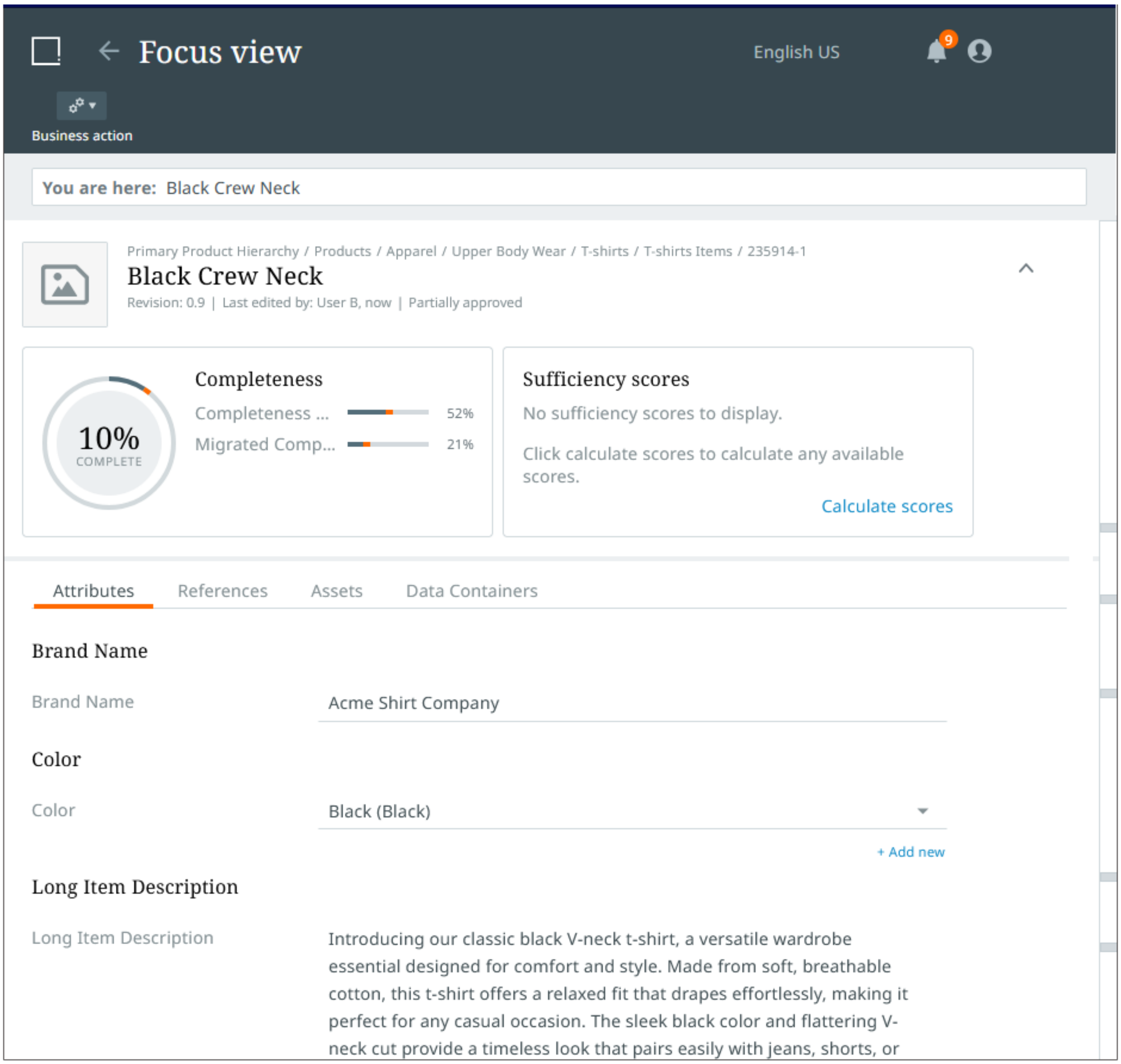


Focus View

To quickly access a broader range of attributes on a referenced object, click the blue arrow button located to the right of the checkbox on the referenced object.

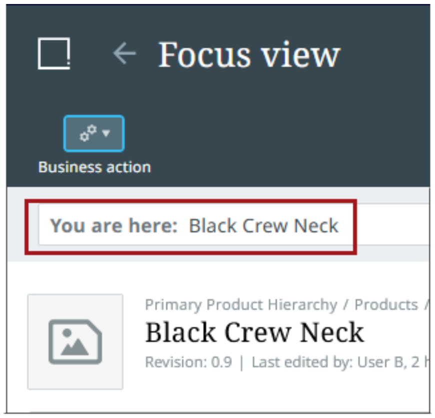


This opens a "Focus view".



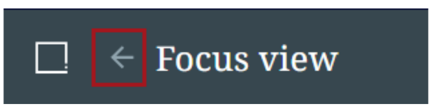
In the focus view, users can edit a referenced object using the attribute tab page configured for the referenced object's object type. If the user then wants to navigate to an object referenced by the referenced object, they can do so by, once again, clicking the blue arrow button for the referenced item on the configured reference tab page.

At the top of the screen in focus view is a field with the text "You are here" inside.



Displayed in this field is a list of the referenced objects viewed within a focus view session. To navigate to any of the objects viewed in the session, click the relevant object shown in the field.

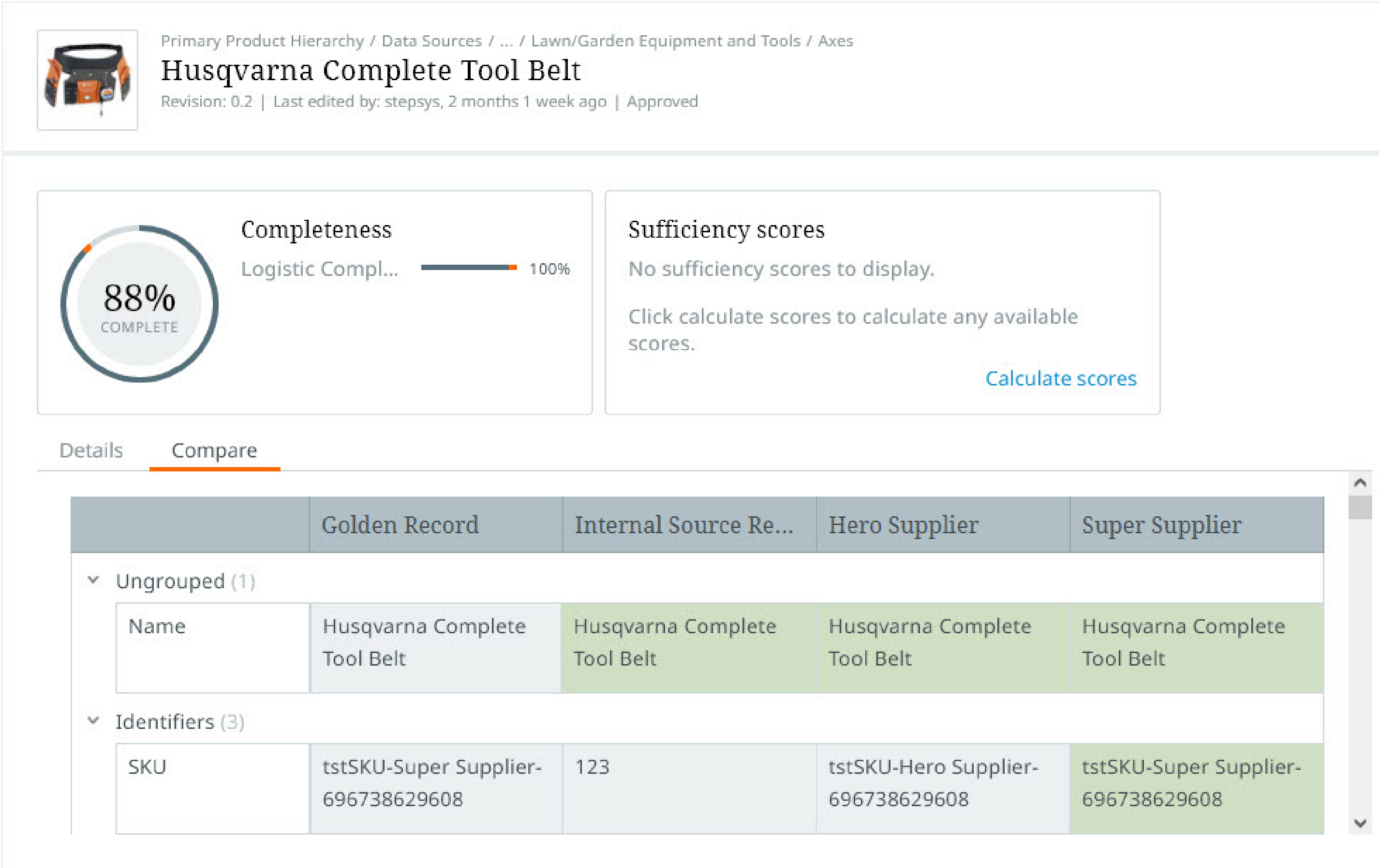
To go all the way back to the original object, click the arrow in the top left-hand corner of the screen, next to the "Focus view" title.



For more information on how to configure a "References" tab, refer to the Configuration tool tabs setup topic.

Compare Tab

The "Compare" tab allows appropriately privileged users to both view and manage product information. The tab is accessible by clicking the "Compare" tab, which is located to the right of the "Details" tab.

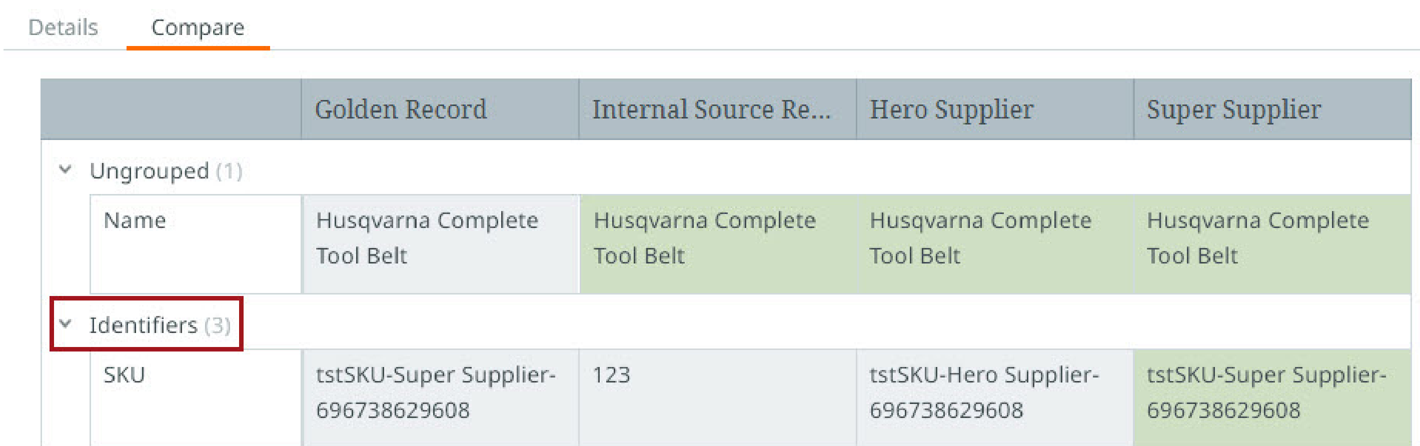


Display

This tab displays a table showing the various records that contributed to a given product's product data described on the "Details" tab.

The records displayed on the tab include the golden record, the internal record, and the external record(s) associated with the product. Each record displays in its own column. The golden record and internal source records are displayed in the "Golden Record" and "Internal Source Record" columns, respectively, and the external records are displayed in columns named with the ID of the supplier that submitted the record. If multiple suppliers submitted product data for the same product, multiple external records will display in multiple columns, each named with the supplier ID.

All attributes display in collapsible attribute groups, display of which can be expanded or collapsed by clicking on the arrow button to the left of the attribute group name, as shown in the screenshot below.



To help users review which data from external records have been promoted to the golden record, values in the internal source record and external record column(s) cells matching those found in the Golden Record column will be shaded green. Examples of these cells can be seen in the screenshot above.

Internal source record and external record columns can be manually moved by clicking on the column header and dragging the column to the desired place in the table.

A slider that controls the height of the rows in the comparison table is available just above the table to the far right of the screen.

The "Zoom level" slider can expand the height of columns to make longer values more readable.

Editing

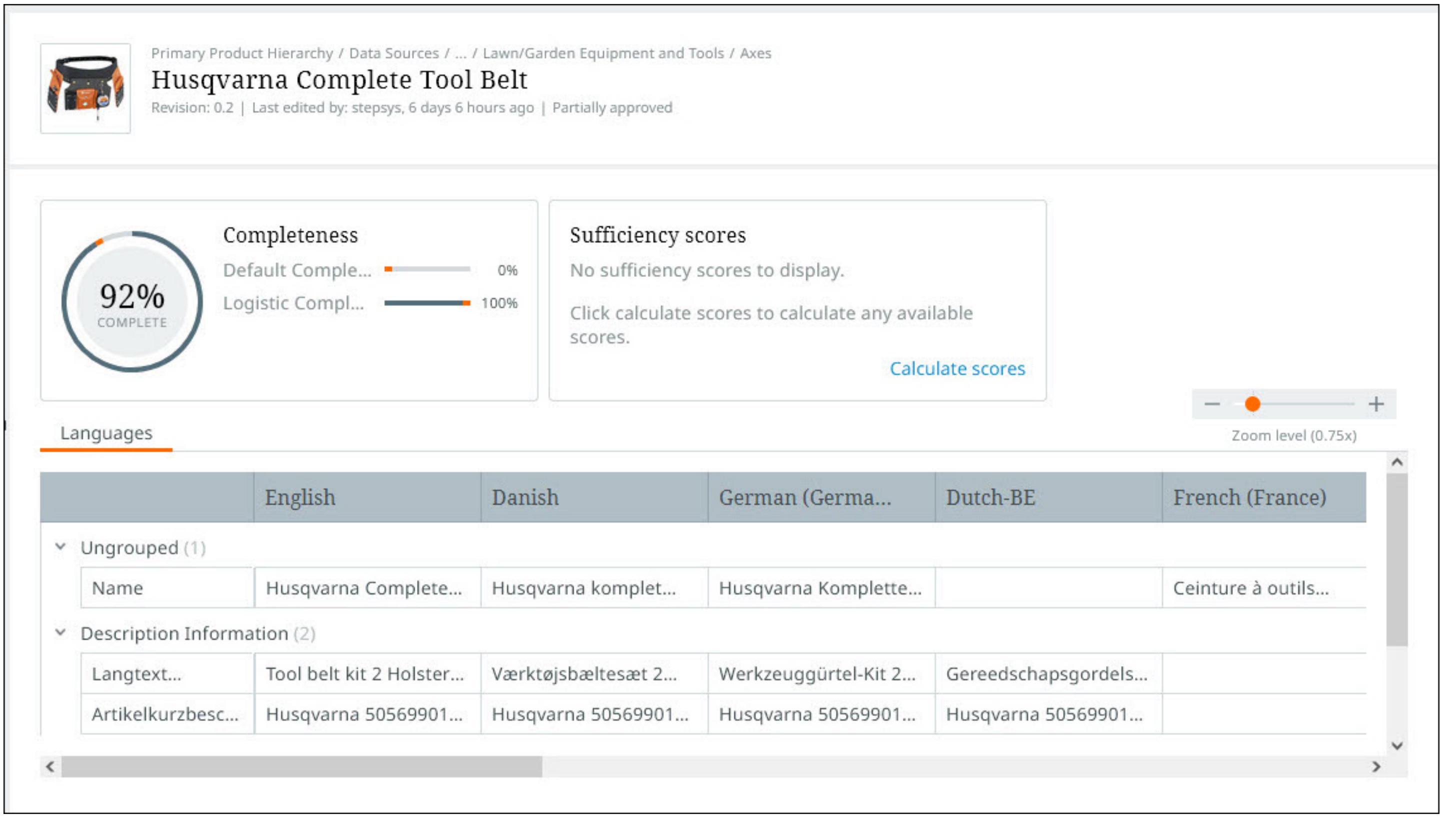
Data in white-shaded cells in the internal source record column can be edited by clicking into the relevant cell. Once edits are made, clicking outside of the cell saves the updates. Gray- and green-shaded cells are read-only and cannot be edited.

If no golden records exist for the product, when the "Compare" tab is clicked, no information will display.

If the user wants to update values displaying in the golden record column, they can make the needed edits to the internal source record data. Once the internal source record is approved, those values are promoted to the golden record.

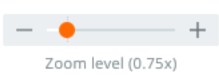
Languages Tab

The Languages tab features a table presenting product information for the languages the user is privileged to view. Each column in the table displays translated product information for the language shown in the header. The information presented includes default aspects (like name and ID), as well as attribute values. Based on how the tab is configured, the table can display one or multiple attribute groups, which can be collapsed or expanded by clicking the arrow icon to the left of the parent attribute. If no attribute or attribute groups are configured, the table will display all valid attributes presented in their attribute groups.



All attributes showing in the Languages tab display in attribute groups. All columns can be clicked and dragged to the desired place in the table by clicking on the gray-shaded header and dragging the column to a new table location.

A slider that controls the height of the rows in the languages table is available just above the table to the far right of the screen.



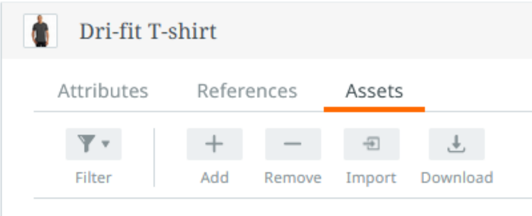
The "Zoom level" slider can expand the height of columns to make longer values more readable.

Note: If the name of the product is dimension-dependent for language, the aspect "Name" will show in a group called "Ungrouped". If the "Name" is not dimension-dependent, only the configured attribute groups will display.

Assets Tab

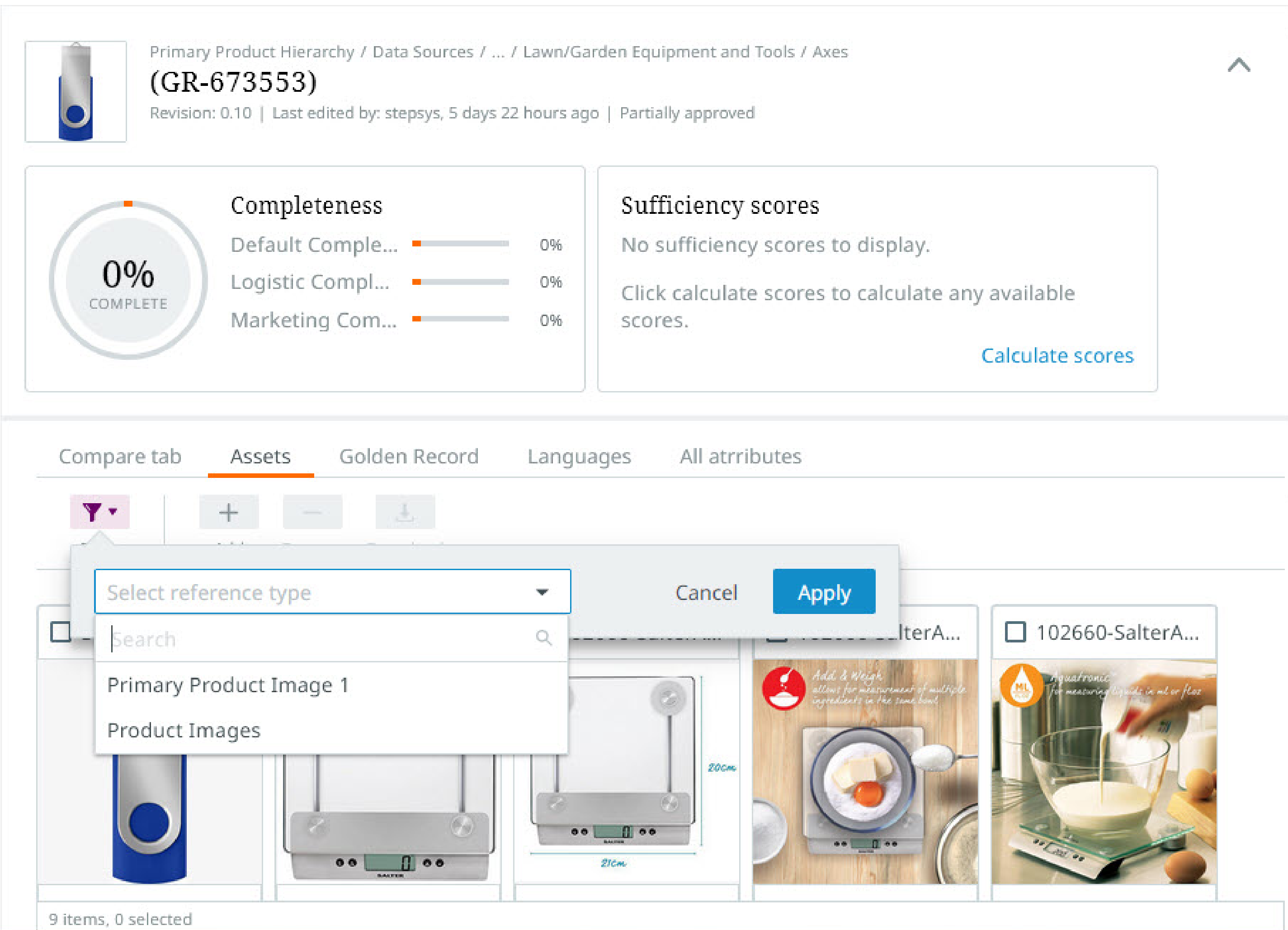
The "Assets" tab, available in the details view, presents all referenced assets in a gallery view. The assets display as tiles that show either thumbnails or icons to represent the asset. The functionality available in the tab enables users to view, filter, expand, download, upload, add, and remove assets associated with the viewed product.

Above the gallery are four buttons: "Filter," "Add," "Remove," "Import," and "Download."



Filter

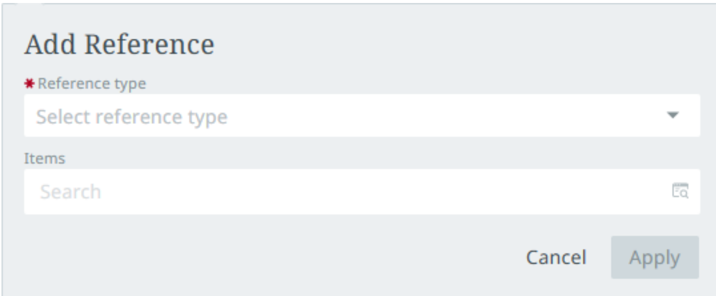
When the "Filter" button is clicked, a dialog displays that allows users to select the reference type they want to filter by. When users click into the "Select reference type" field, a dropdown displays listing all reference types the referenced assets use. By selecting one of the listed reference types, the page will only display assets that use the selected reference type.



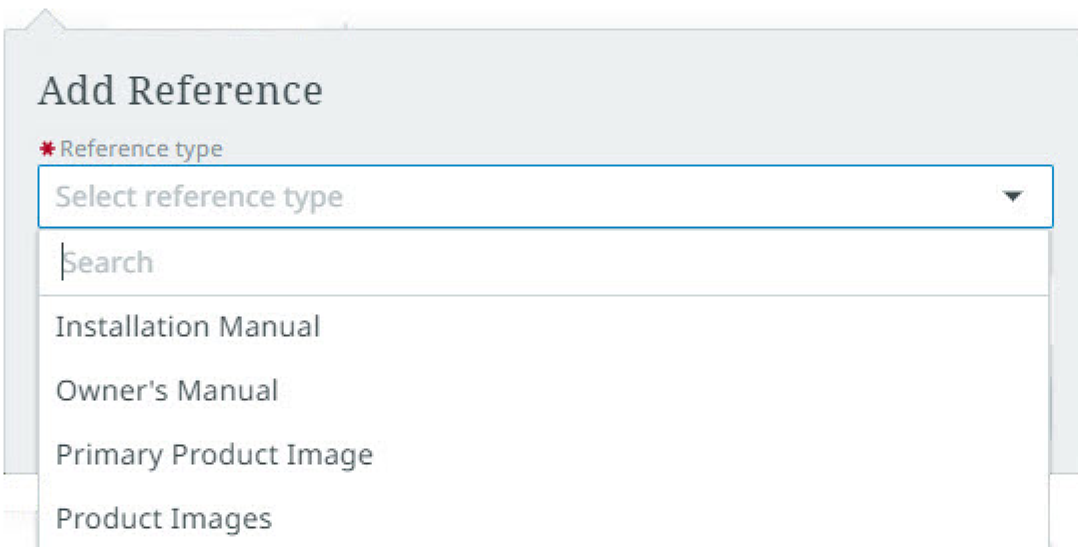
For instance, if the user only wants to view the referenced assets of the "Product image" reference type, users can select "Product image" from the list of reference types and restrict the tiles that display to only those assets that use the "Product image" reference type.

Add

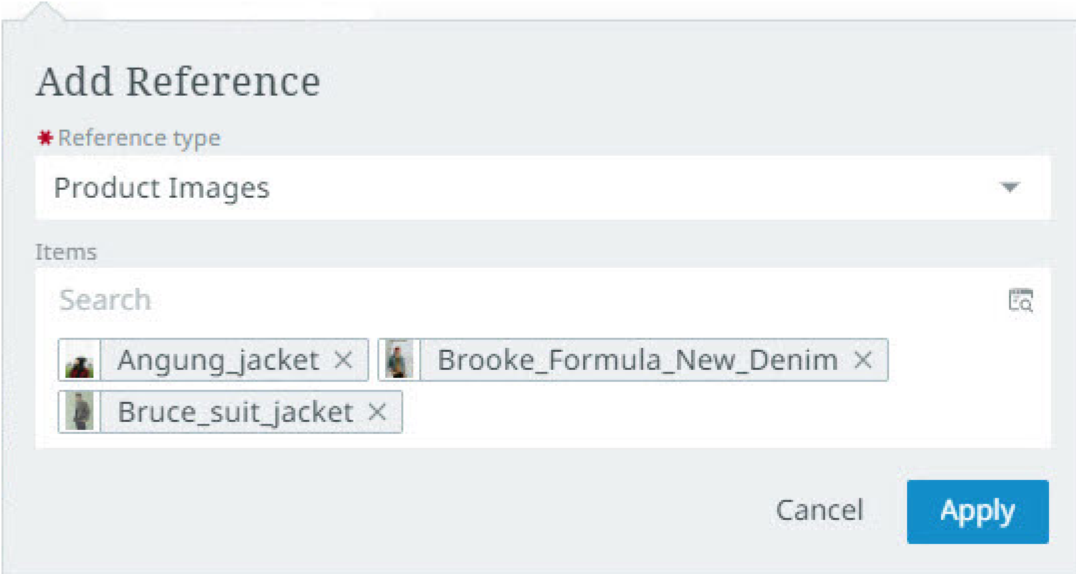
The "Add" button enables users to add references to assets from the object being viewed. When the "Add" button is clicked, a dialog displays with two fields: "Reference type" and "Items".



To add a new asset reference, first, click the arrow in the "Reference type" field to display the dropdown. A list of available asset reference types will display. Select the reference type of the asset you want to reference.



Once you have selected the desired reference type, a list of all currently referenced assets will display in the "Assets" field.



The dialog provides two ways to select the asset to reference. In the "Search" bar, found at the top of the "Assets" field, start typing the desired asset and the typeahead feature will display a list of relevant assets to select. To navigate to the desired asset, click the "Item Picker" icon in the right side of the "Search" bar. The Item Picker supports multi-selection of assets. (For more information on using the Item Picker functionality, review the Item picker topic.)

Remove

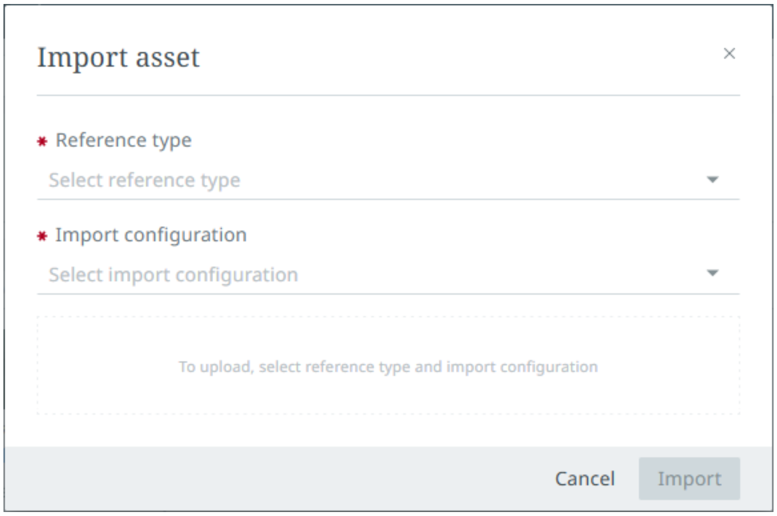
By clicking the "Remove" button, users can remove assets from the referenced product. To remove references to assets, users can click the checkbox at the top of the tile to select it. With the tile(s) selected, clicking the "Remove" button deletes the reference to the selected asset(s).

A footer displays at the bottom of the table that states how many assets are in the gallery, and how many of those are currently selected.

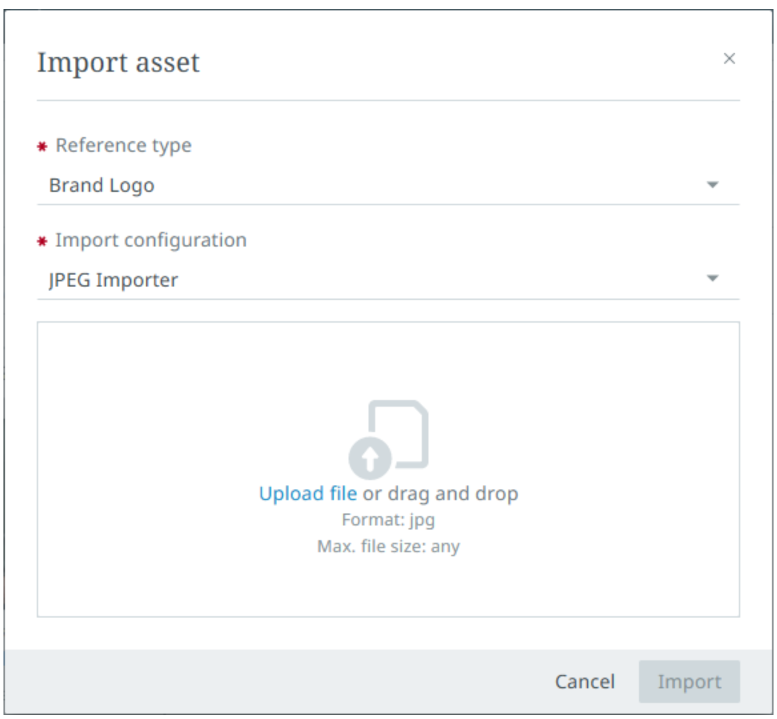
If no assets are associated with the viewed product, text will display in the place of tiles that reads, "There were no results for your selection."

Import

The "Import" button allows users to import assets for the viewed object and create an asset reference between the object and the asset. When clicked, an "Import asset" dialog displays.



For the "Reference type" parameter, click the arrow to show a dropdown displaying all reference types valid for the object. Once selected, the "Import configuration" field auto-populates with an import configuration whose name matches either completely or partially with the name of the selected reference type. If this import configuration is not the desired configuration, users can click the arrow at the far right of the "Import configuration" field to display a dropdown containing all import configurations valid for the selected reference type. With both selections made, any restrictions associated with the selected import configuration (e.g., file size or file type) display in the upload area.



To import a file, click the "Upload file" text button that displays in the upload area. When a file is selected, click the "Import" button at the bottom of the "Import Asset" dialog. A notification displays first to indicate the import has begun. A second notification displays to indicate whether the import was successful or if the import failed.

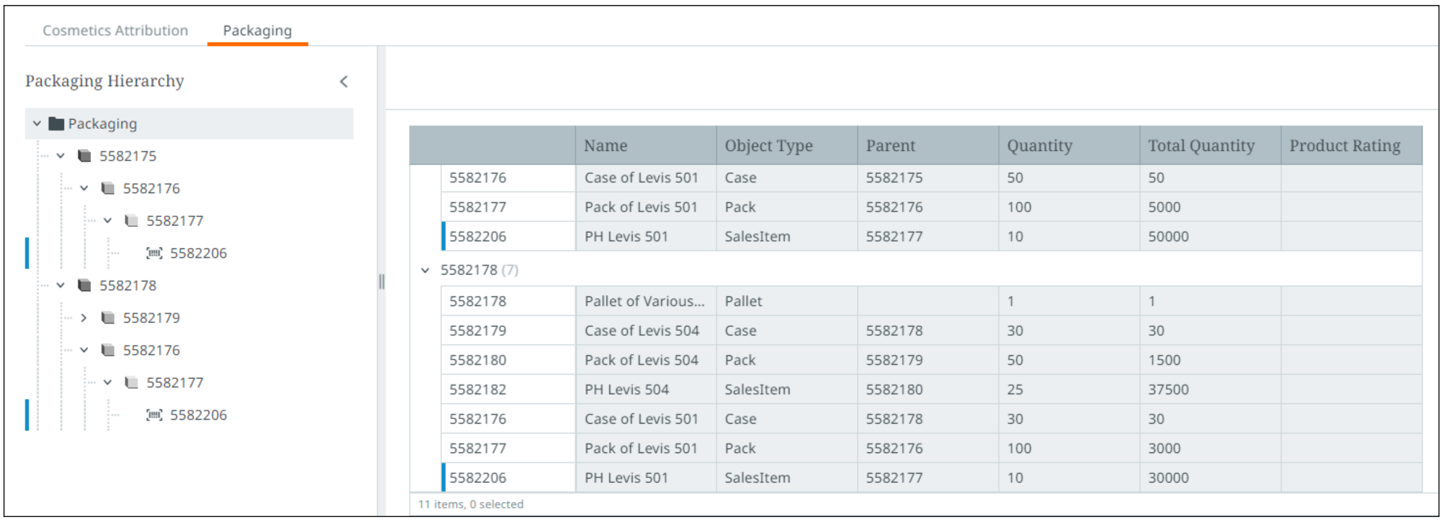
If successful, a refresh of the browser will display the newly created asset reference on the "Assets" tab.

Download

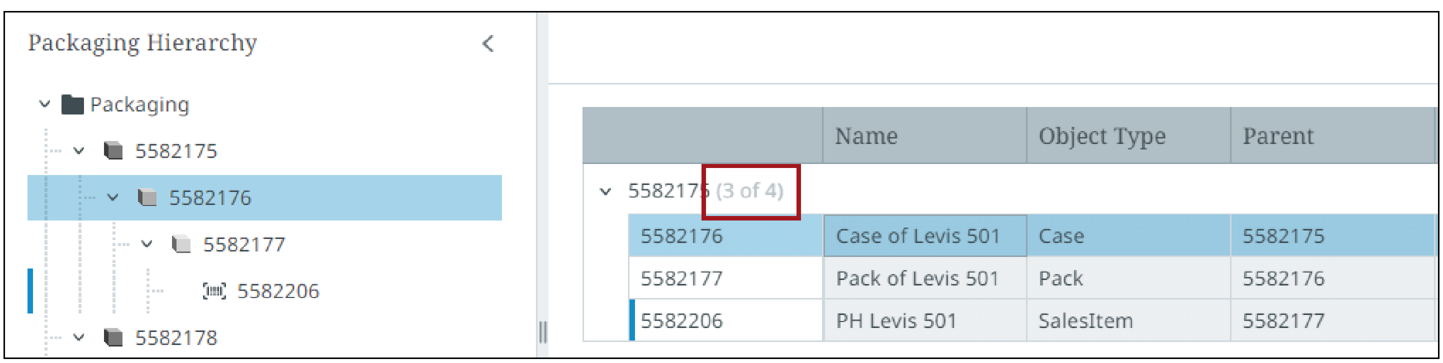
Assets can be downloaded from the "Assets" tab via the "Download" button. To download assets, first select the asset(s) you want to download, then click the "Download" button. The browser will initiate a download of the asset to your local machine.

Packaging Tab

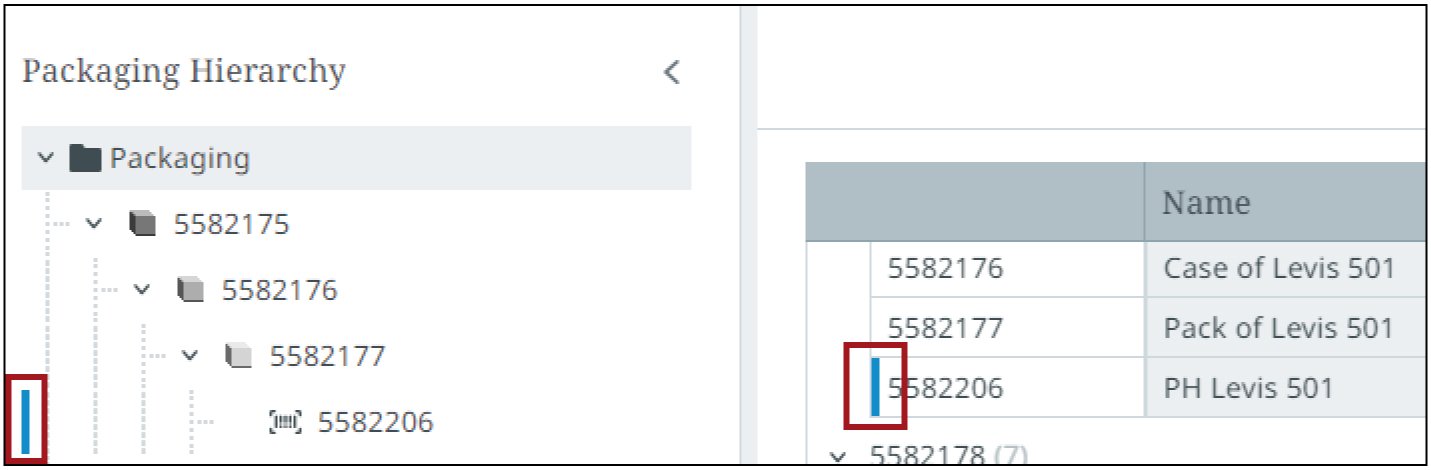
The "Packaging" tab, available in the details view, presents the packaging hierarchies of the currently selected object. Each hierarchy is displayed in the left pane in a tree view, and as a table in the right pane. A zoom slider is accessible above the table that expands table rows to display all relevant content.



Selecting a lower lever packaging object in the hierarchy will narrow down the displayed data in the table(s) to only display child objects. The number that displays beside the header of each table indicates how many packaging objects and products are currently being displayed.

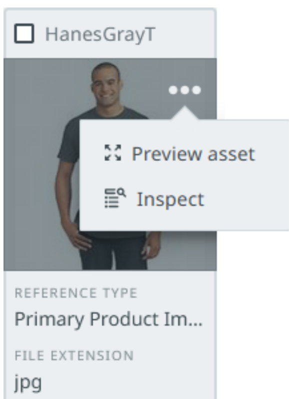


In both panes, the blue line indicates the location of the currently selected object in the packaging hierarchy.



Asset Preview

To display a preview of an asset, hover your cursor over the thumbnail for that asset in the asset tile. An ellipsis displays in the upper right-hand corner of the thumbnail. When you click the ellipsis, a pop-up displays with two options: "Preview asset", and "Inspect".



When you click "Preview asset", a full-screen overlay displays that presents:

- a tile (or tiles) in a column that lists all assets referenced by the object (on the left side of the screen)
- an expanded view of the asset in the asset panel (on the right side of the screen)

If the checkbox in the tile is checked, you may download the checked asset via the "Download" button, found directly above the column. If downloading multiple assets at once, the assets will be placed into a zip file onto your local machine.

When a user selects "Inspect", the asset details view is displayed. From here, users can review the asset specifications, the relationship information (i.e., the objects the asset is referenced by), and remove or replace the asset content.

For more information on managing assets in the asset details view, refer to the "Assets" section of the Product references and classification links topic.

Note: The asset preview and "Inspect" functionality are also available in the thumbnail that displays at the top of the details pane.

Section Bar

The section bar, located to the left of the scroll bar, is a non-scrolling quick-navigation tool that enables easy access to attribute groups, as well as potential errors, found on the product.

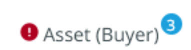
The short gray horizontal markers that display at intervals along the section bar each represent a set of product data; the gray marker's placement in the section bar indicates the data set's relative location on the page. For instance, by clicking the first gray marker at the top of the section bar, a list of attribute groups nearest the top of the list of product data displays in a dialog. When an attribute group from the list is clicked, the page auto-scrolls until the selected attribute group displays at the top of the page. In this way, a page of product data containing a thousand or more attributes can be navigated with a single click, without scrolling.

Errors

Errors on an item will display as exclamation points inside of red circles in the section bar, corresponding to the placement of the affected attribute. Warnings display as yellow triangles in the section bar, also corresponding to the placement of the affected attribute.

Clicking on the warning icon will auto-scroll down the product details pane to the relevant attribute. Additionally, the data quality measuring capabilities, available in both the Sufficiency and Completeness tiles, can be set to display blue flag icons to indicate where a given sufficiency requires additional data enrichment. When the flag is clicked, the page auto-scrolls to the relevant attribute.

Errors on an item will also be denoted on the tab label itself. An exclamation point inside a red circle or yellow warning triangle icon displays to the left of the tab label if there are errors are warnings on that tab. These errors and warnings are generated when attributes and references are affected by business rules applied to a given item. If attributes related to the Sufficiency or Completeness tiles are missing values, a blue circle displays to the right of the tab label. Inside the circle is a number indicating how many missing attributes or references need to be added as required by the Sufficiency and Completeness configurations.



For more information on Sufficiency and Completeness, refer to the Sufficiency scores card and Completeness card topics.

Managing Data

Within Instrument, attributes and references are a key part of product data. In a general sense, attributes are used to provide details about items (i.e., products, classifications, and assets) while references are used to define connections between items. There are several different ways to manage both attribute and reference data within Instrument.

For more information about managing attribute data, go to Attributes. For more information about managing reference data, go to References.

Attributes

Attributes are characteristics or details that help describe an item displaying in Instrument. If the item is a product, then an attribute might be its weight, color, or height. If the item is an asset, the attribute might be an image's width and height, file type, or its subject. Attributes and the values assigned to those attributes are central to building quality master data, and Instrument meets this requirement by enabling users to manage their attributes–add, delete, and edit–in either the list or gallery views.

List View

When looking at an item in the list view, attribute values can be changed from within the table cells.

You can also use the mass update capability to edit attributes in bulk by selecting a cell and dragging the data across other editable attribute cells to override them. The selected cells' value will copy to other selected cells above or below it. However, mass updates cannot be applied to references, workflow variables, completeness, primary, name fields, or any field that the user does not have privileges to edit. Mass update works between cells with the same type of value. For more information on copying and pasting in tables, refer to the Perspective basics topic.

In the list view, when editing cells that contain text values ("Text" or "Text (exclude tags)" validation base type attributes), line breaks can also be added to the text. To add line breaks: click into the editable cell, position your cursor where the break should be added, and then press "Enter" + "Shift." Double clicking into the cell will verify that the line breaks are correctly placed.

Details View

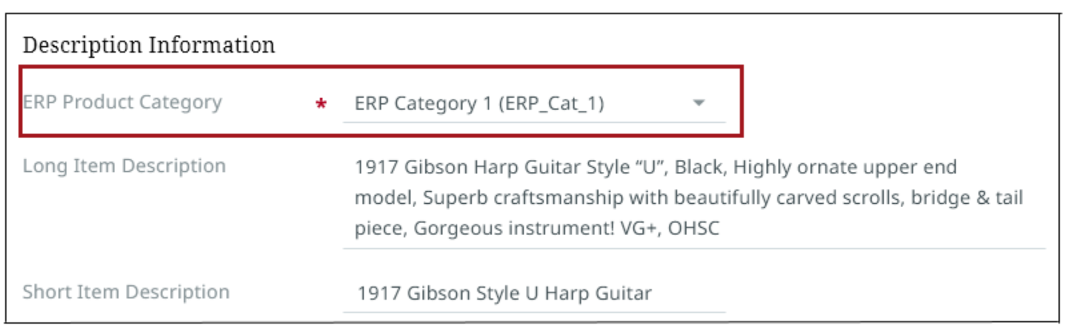
When looking at a product in the details view, attribute values can be changed from within the details pane.

Attribute Editing Options

Whether in the list or details view, each field may offer different selection options based on the attribute you wish to edit. For example, a "Long Description" attribute may be a simple text field, while "Brand Name" may allow users to select a value from a pre-configured list of value options.

Additionally, data field validation is communicated and enforced. For example, you may only be allowed to enter numbers for a "Product Width" attribute value. It may even indicate and automatically apply the relevant unit of measure.

Mandatory attributes are denoted by a red asterisk.



References

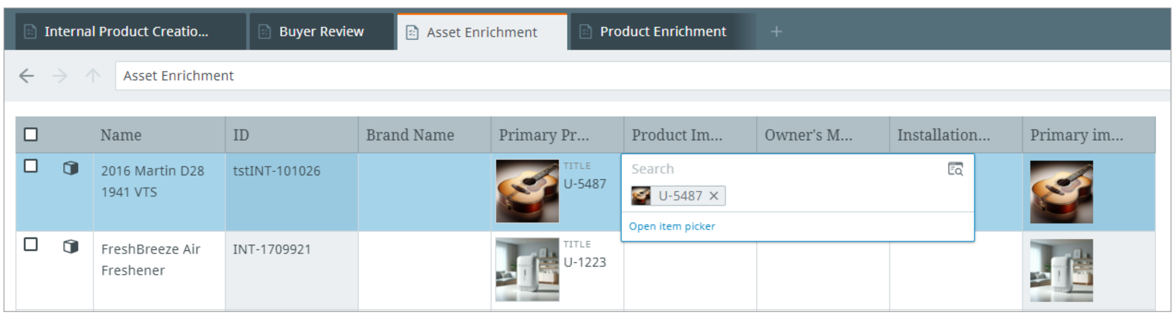
References allow you to define a connection between two objects, essentially creating a set of rules for the relationship between those objects. For example, a reference can associate an image with a product, link multiple addresses to a single company, or connect an object to a classification, among other uses. References can be inherited from one object to another (i.e., a specific-sized shoe inherits a reference from a brand of shoes) or references can be local (i.e., a specific-sized shoe has its own reference not inherited from a brand of shoes or any other object).

For more information regarding inherited and local references and how to differentiate between these types of references, go to the References-Inherited and Local topic.

List View

Like attribute data, reference data can be edited from within a perspective. Only outbound (target) reference columns can be added manually using the Customize toolbar action. More information can be found in Customizing columns.

When looking at one or more products in the list view, outbound references can be added or removed from within the table. First, double-click the outbound field on the reference you want to edit to display a dialog.

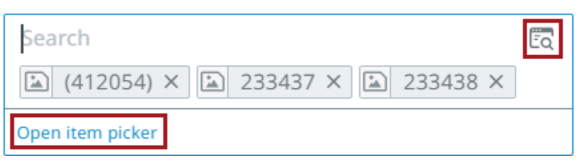


There are two ways to add a reference from the cell via the dialog:

- All current outbound references for the selected object are listed below a "Search" field in the dialog. Use the typeahead search functionality in the "Search" field (based on the object ID or name) to specify a product to reference. This method of adding a reference is depicted in the video below.

> **Note:** Single-reference reference types will not display in the typeahead dropdown. If a cell is already populated with a reference for a single-reference reference type, typeahead will not be available for that cell until the single reference has been removed.

- To access the Item Picker, click either the Item Picker icon in the right-hand side of the dialog, or click the 'Open Item Picker' text button.



The Item Picker dialog that displays allows you to navigate product and classification hierarchies, depending on the target type configured for the reference type, and add references.

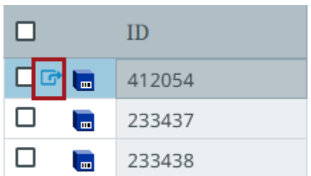
If a reference must be added to multiple items at once, first multi-select the relevant items in the table, then use either of the options described above to add the reference to all selected products.

For more information on the Item Picker, refer to the Item picker topic.

To view the details of a reference or a group of references, right-click the reference cell and select "Inspect" from the dropdown, or click the table cell that contains the references and then click the "Inspect" button on the toolbar.

If the Inspect icon is selected within a cell that allows for multiple product references, the reference table will be displayed.

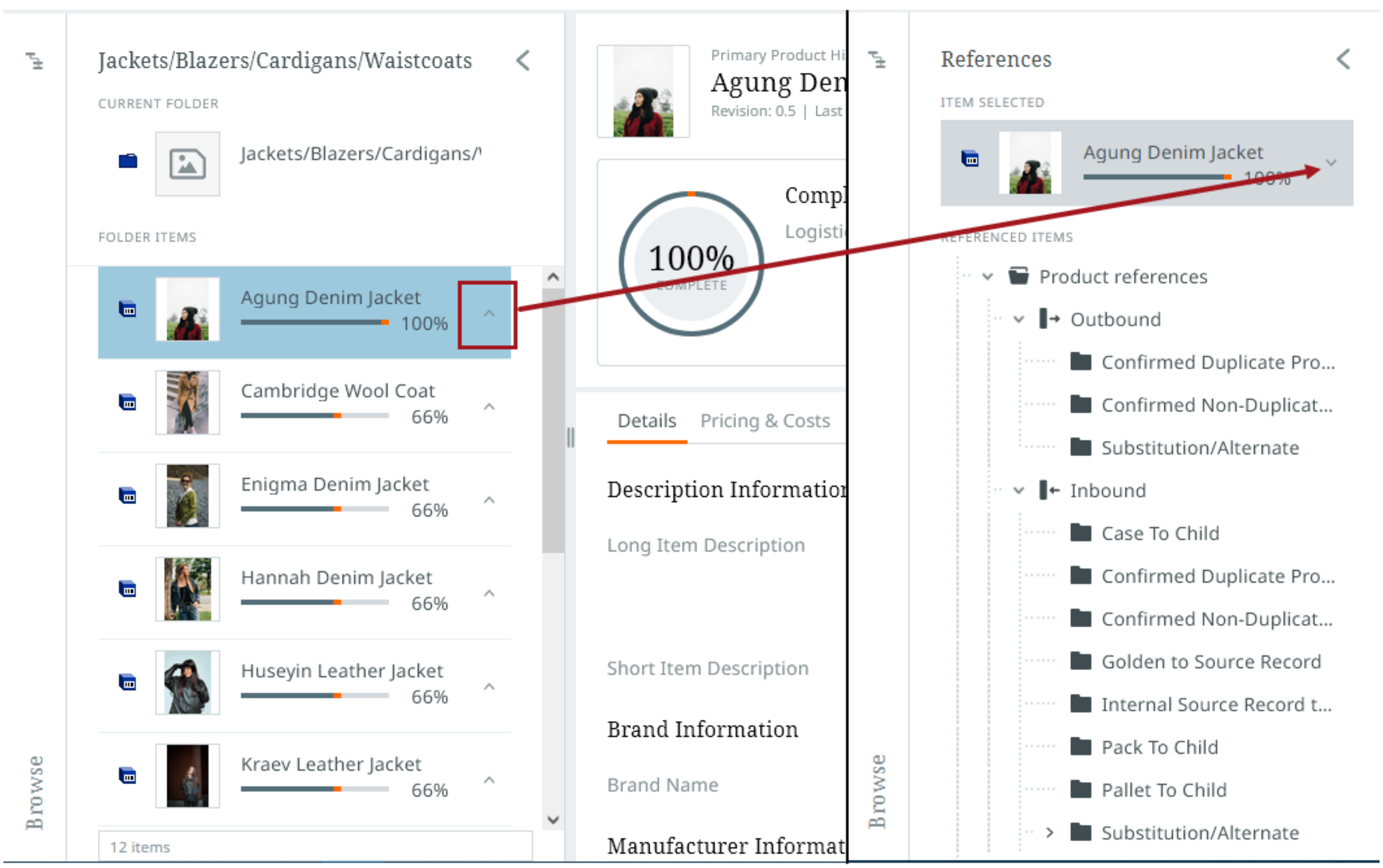
The Details page for a specific referenced product that is displayed in the reference table can then be displayed by clicking the blue arrow button located in the product row, as shown in the screenshot below.



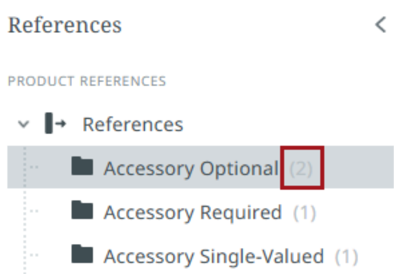
Details View

When looking at an item in, for example, the Tasks perspective using the details view, reference metadata can be changed from within the details pane.

To access references, click the arrow next to the product information in the hierarchy. For example:

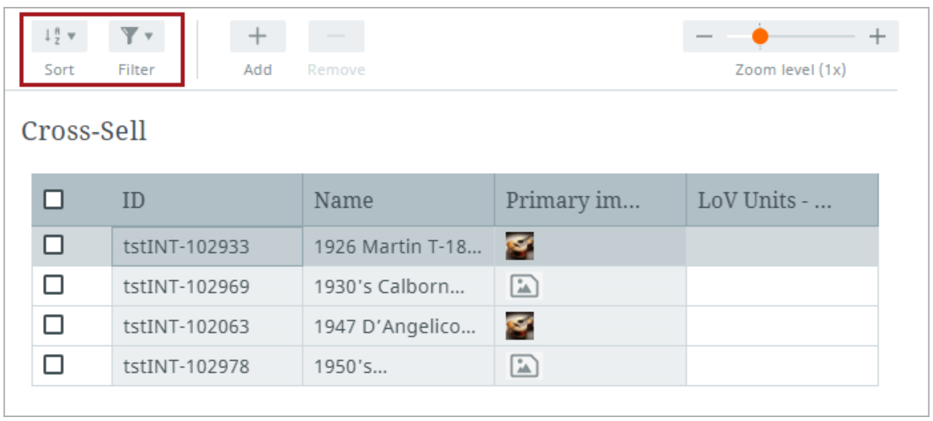


Additionally, if a "References" tab has been configured, users can select a reference type from a collapsible "References" column that displays on the left side of the details pane. Reference types that have references will display with a number in parentheses indicating how many references there are for the reference type.

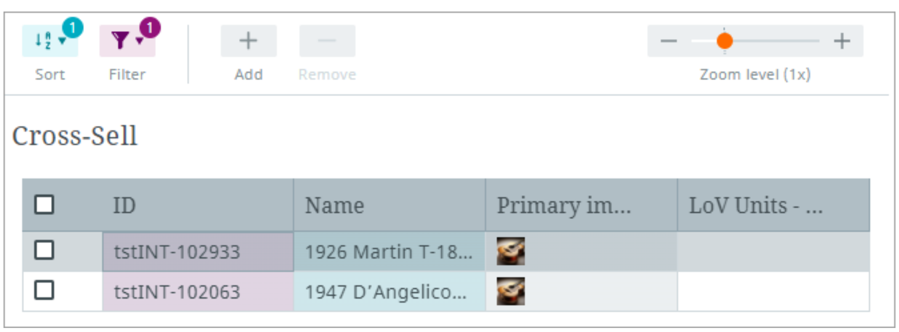


Sorting and Filtering References

If a "References" tab has been configured, buttons above the table in the secondary toolbar allow users to sort and filter referenced objects in the table that displays on the right side of the details pane.



Both sorting and filtering are possible using the available columns in the view in the References tab. The color of the column being used changes, indicating the column is used for either sorting or filtering. Refer to the Sorting or Filtering topics for additional information.

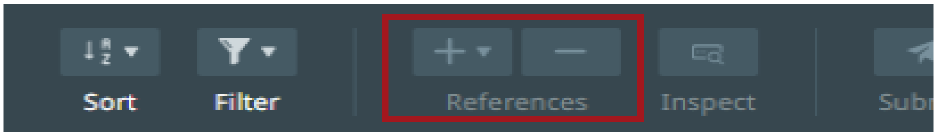


Adding and Removing References

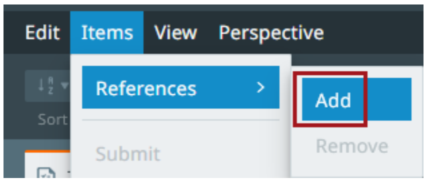
Users can edit data on the referenced objects in the table that displays on the right side of the details pane for the "References" tab.

There are two methods to add or remove references:

- click the "+" (Add) or "-" (Remove) buttons in the "References" section of the toolbar

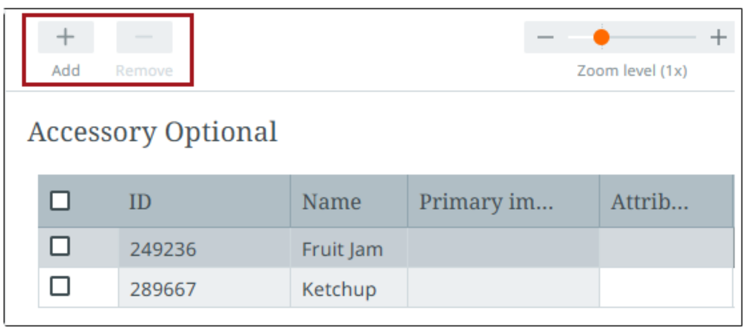


- click the "Items" option from the menu, and then click "References"; if adding a reference select "Add..." from the dropdown; if removing a reference, first select the reference to be removed, then click "Items", and select "Remove"

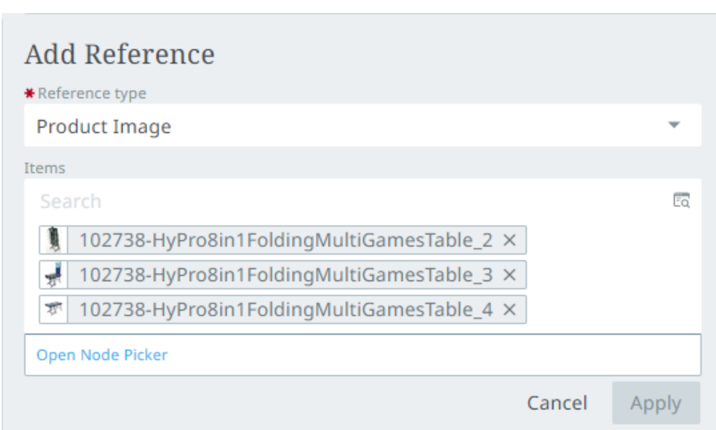


The "+" (Add) button (and corresponding menu option) is always active when viewing items in a "Details" view on either the "Browse" or "Tasks" perspectives. The "-" (Remove) button (and corresponding menu option) is only enabled when a specific reference has been selected. If neither button is active, the current view does not allow for the addition or removal of references.

If a "References" tab is configured, buttons above the table in the secondary toolbar allow users to add new references by clicking the "Add" button and to remove existing references by selecting the relevant reference and clicking the "Remove" button.

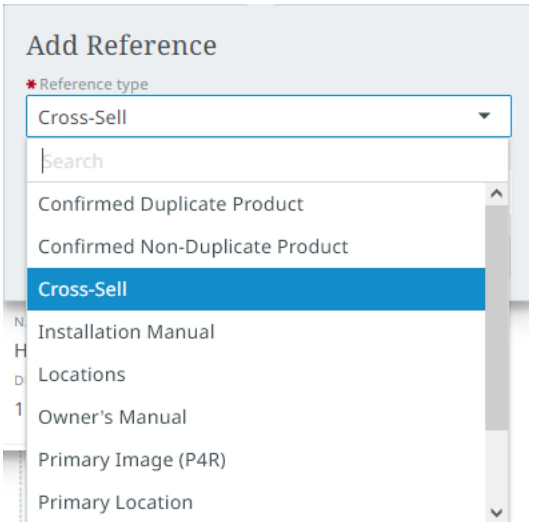


Adding a reference using any of these methods will display an "Add Reference" dialog.



If the user is viewing the references for a reference type in a "Details" view on a "Tasks" perspective and then clicks the "+" (Add) button, the "Reference type" field in the "Add Reference" dialog is pre-populated with the viewed reference type.

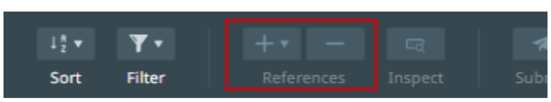
If a reference of a different reference type is desired, click the arrow in the right-hand corner of the field to display a dropdown listing all available reference types.



In the "Items" field, all existing references will display. To add a reference in this field, start typing the desired item to reference in the "Items" field and the typeahead function will display a list of relevant options for selection. Alternatively, users may navigate to the desired reference by clicking either the "Item Picker" button in the right-hand corner of the field, or the 'Open Item Picker' button that displays below the field after the user clicks into the "Items" field.

For more information on using the Item Picker, refer to the Item picker topic.

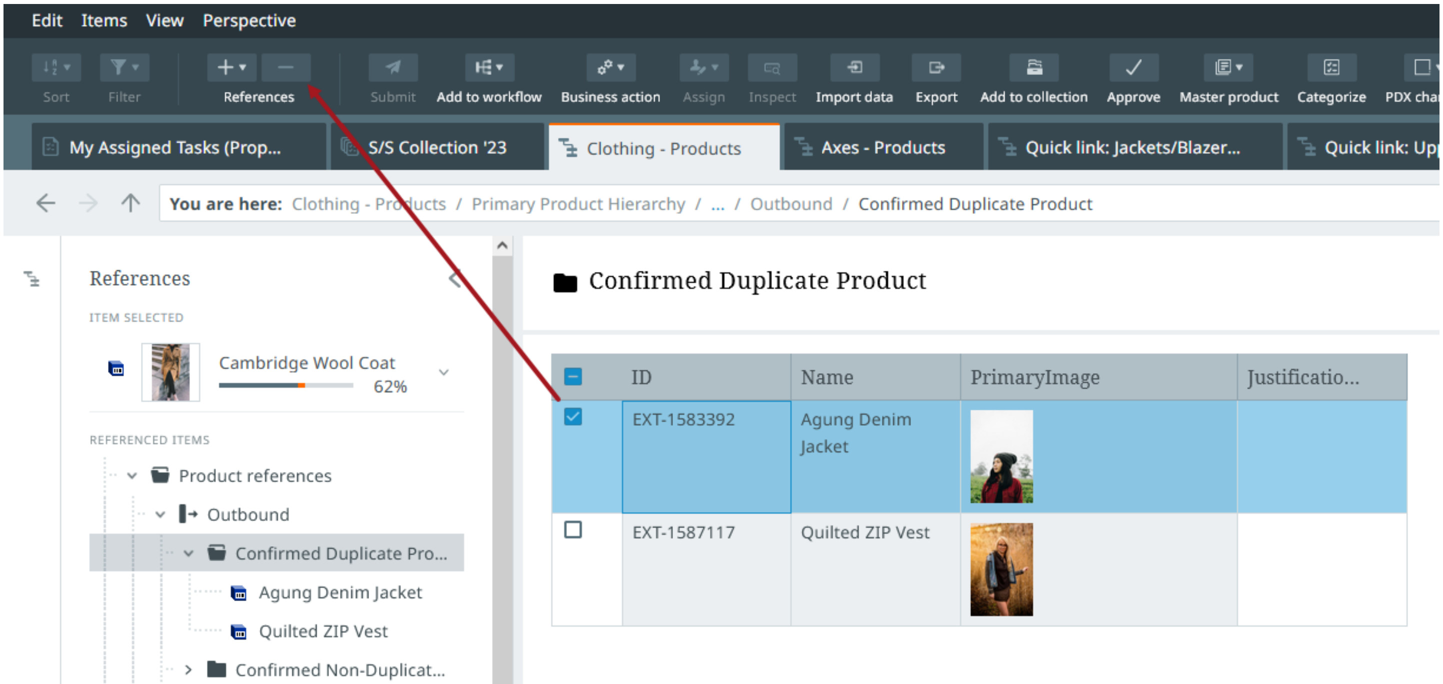
References Hierarchy and Table



If you are working in the reference hierarchy or in a reference table, the "+" (Add) and "-" (Remove) buttons in the toolbar can also be used to add and remove references. When adding references, you can use the typeahead function as described above, or the Item picker feature to find the items to reference.

In the reference table, it is possible to select many references by using the table checkboxes.

- The "-" (Remove) button will show as enabled, even if you select references that cannot be removed. You will receive an error message after clicking "-" (Remove) if there are some references that cannot be removed.
- The "-" (Remove) button will be disabled if the direction is inbound and if you do not have the privilege to remove references for the specific object type.



Reference Details

Navigate to the desired outbound reference from the list, and select a field to edit within this "Relationship information" section.

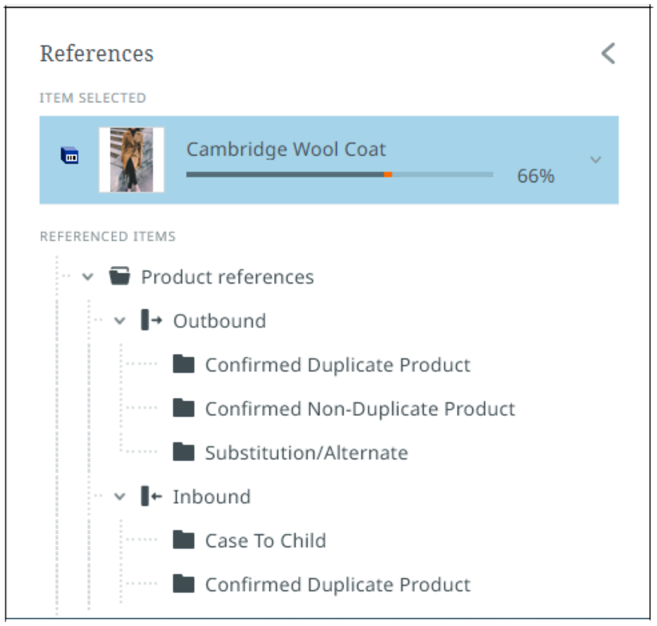
Alternatively, this metadata can be edited directly from the references table that displays when selecting an outbound reference.

You can add and remove references using the toolbar and menu.

This metadata can only be changed for outbound references and non-inherited references. Inherited references are indicated by a hierarchy icon beside the name of the reference.

Classification Links

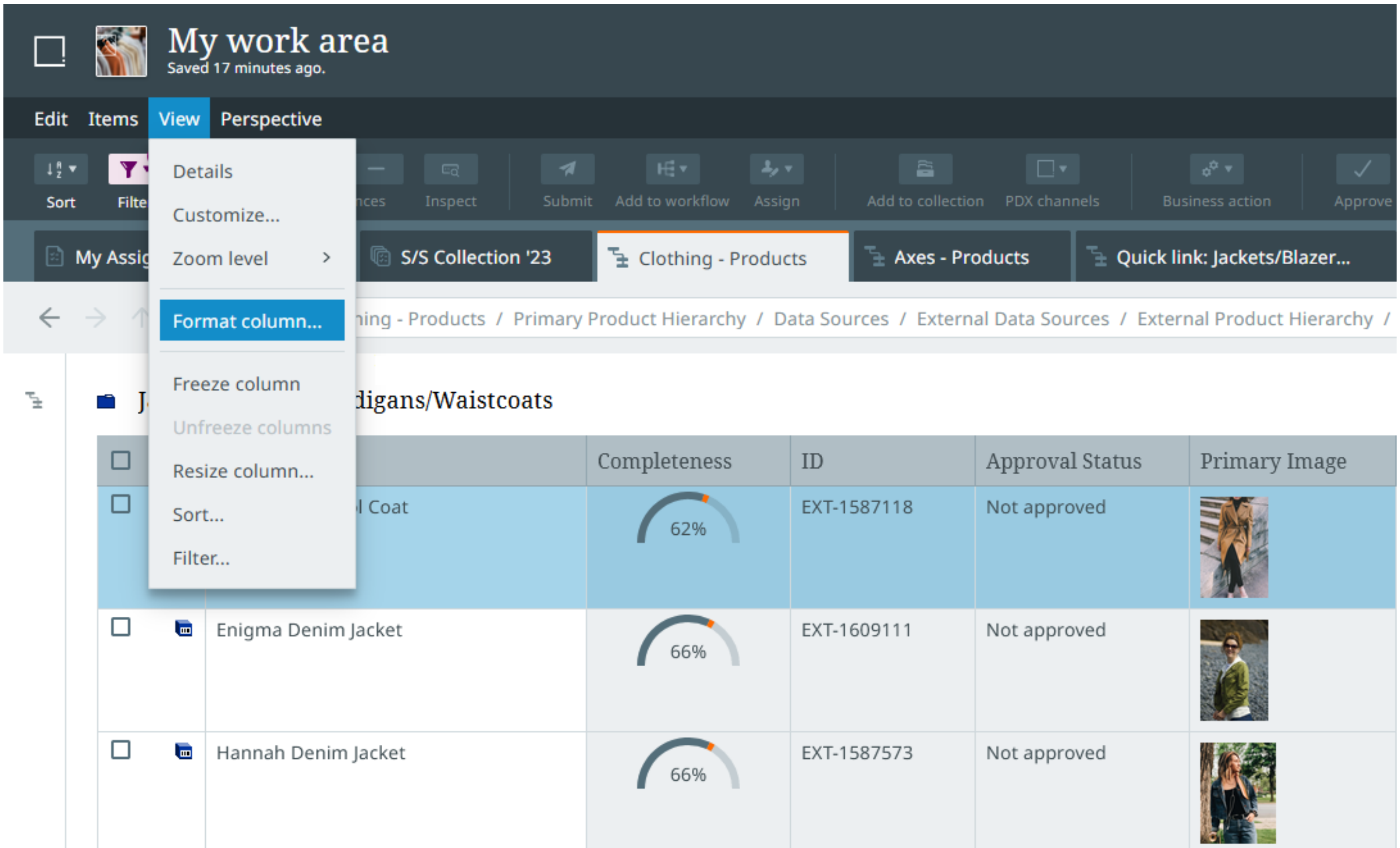
Classification links can be maintained in a similar fashion to references, but only from the details view. Additionally, only outbound classification links can be added or removed.

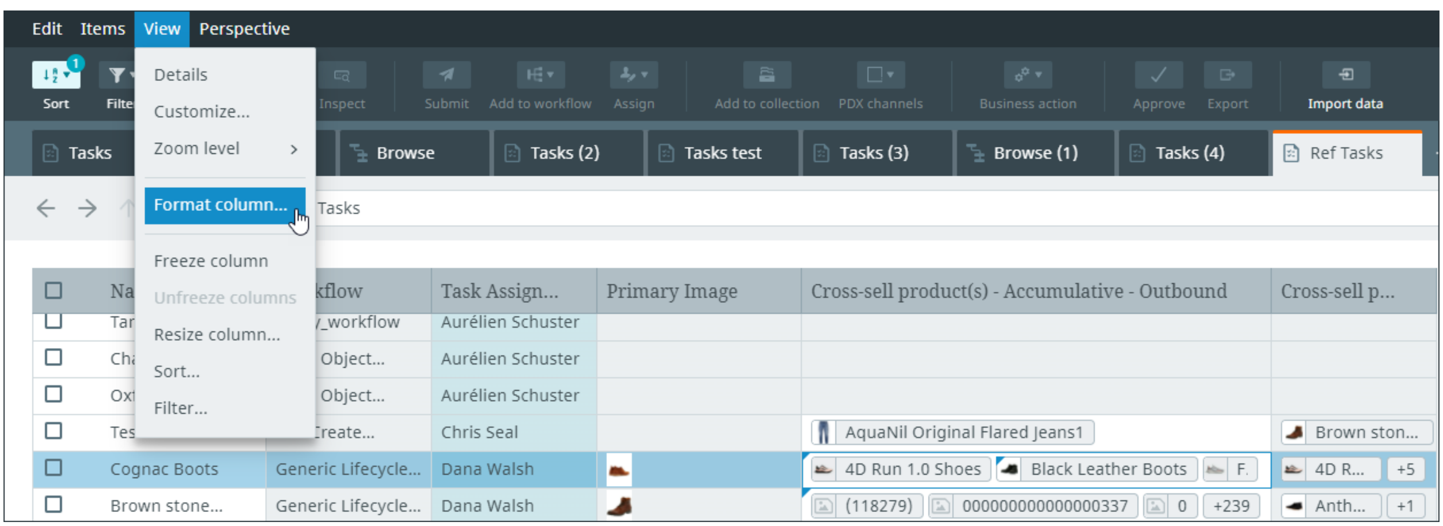


Find more information in Product references and classification links.

References Details Dialog Box

By selecting "Format column" from the View menu, users can configure specific settings that determine what is displayed within the selected referenced product's details dialog box.





These configurable settings include:

- the ability to select which attributes will be displayed in the dialog box (with a maximum of five attributes displayed at one time)
- the option to display the value of selected attributes but not the title of the attributes themselves
- the option to display or not display the primary image on the referenced product on the overlay

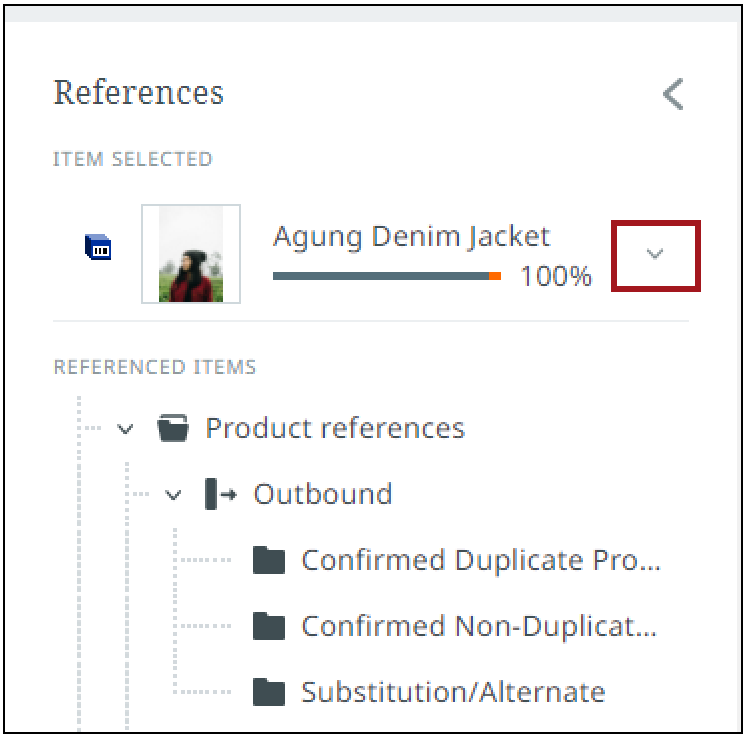
- the ability to choose the display value of the referenced product based on an attribute (e.g., a user may decide to identify the referenced product by its ID instead of its name)

Product References and Classification Links

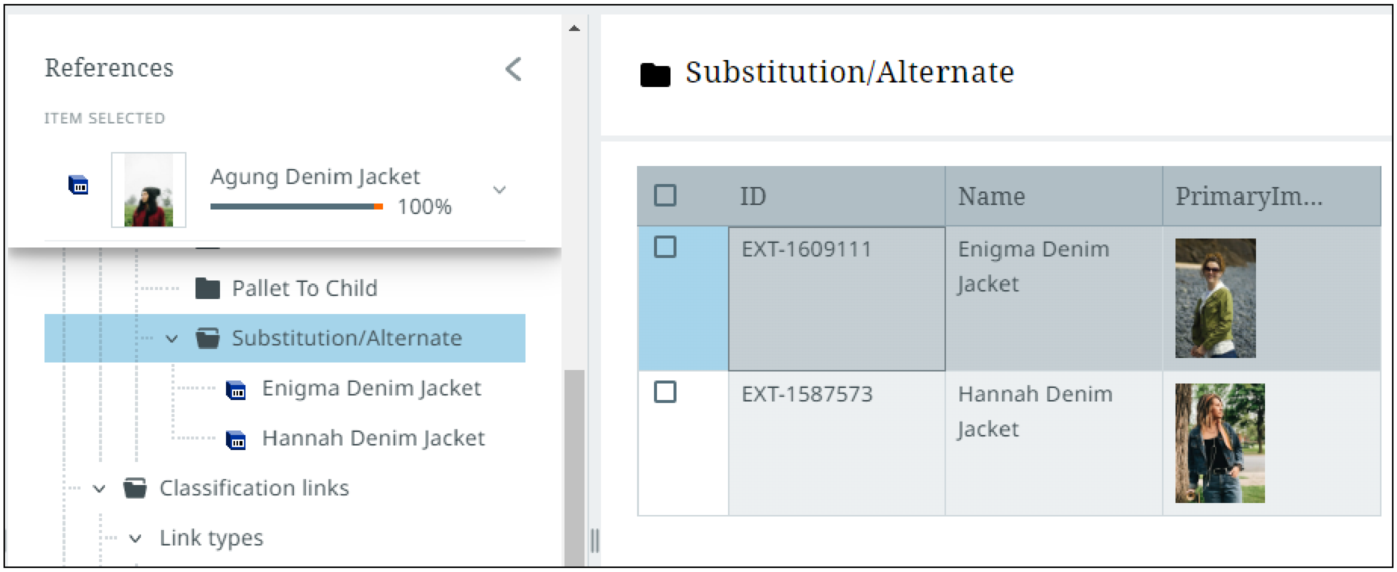
In addition to viewing products and their attributes, you can also view and manage product-to-product references and classification links from the details view.

Product References

1. From the node list, select the arrow icon to view all reference types of a given product. They are split between "Outbound" and "Inbound."

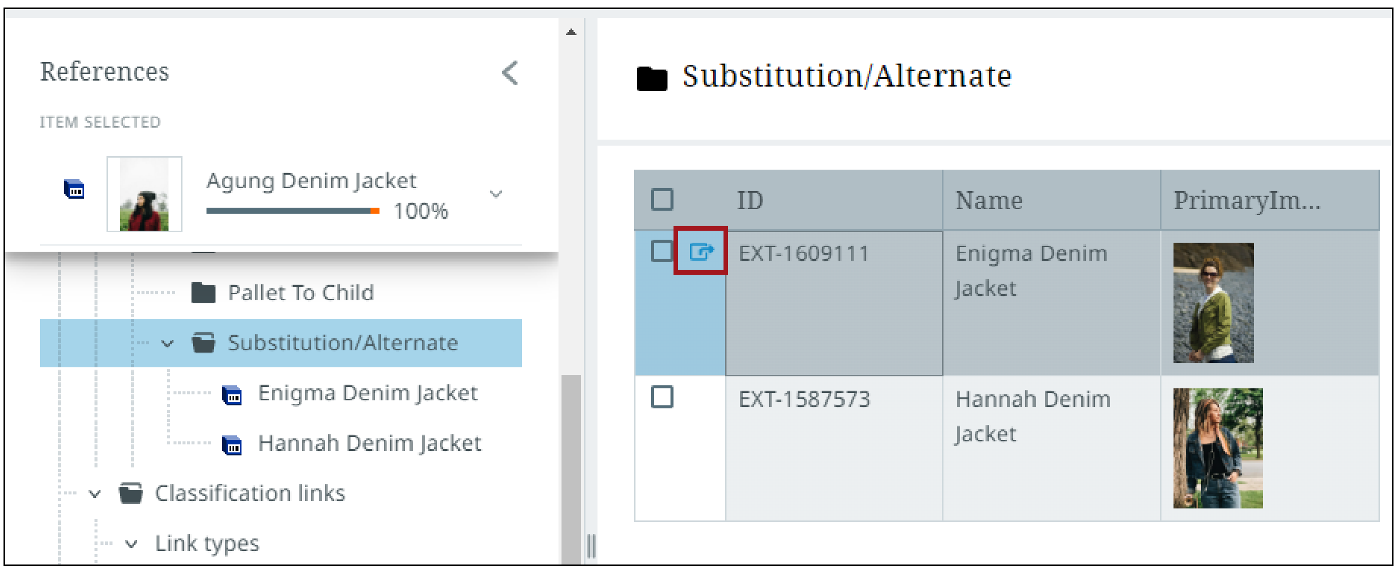


2. In the expanded list, select a reference type to view all references of that type connected to the product (whether it be an inbound or outbound reference). If there is only one reference, it will display the details of that reference in the product details pane, otherwise it will display a table of all references. Reference types listed here can also be expanded to view all references of that type within the pane.

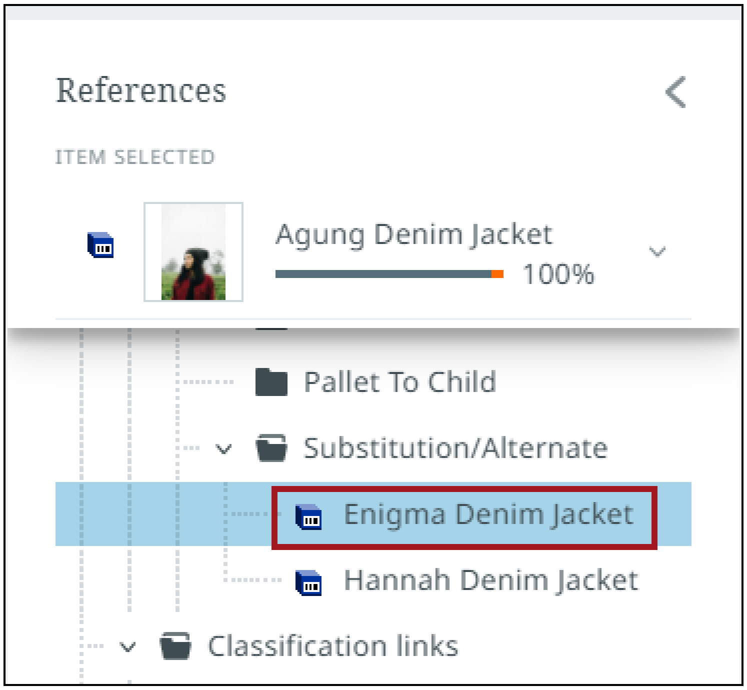


The table view displays default product information such as "ID" and "Name," as well as reference metadata.

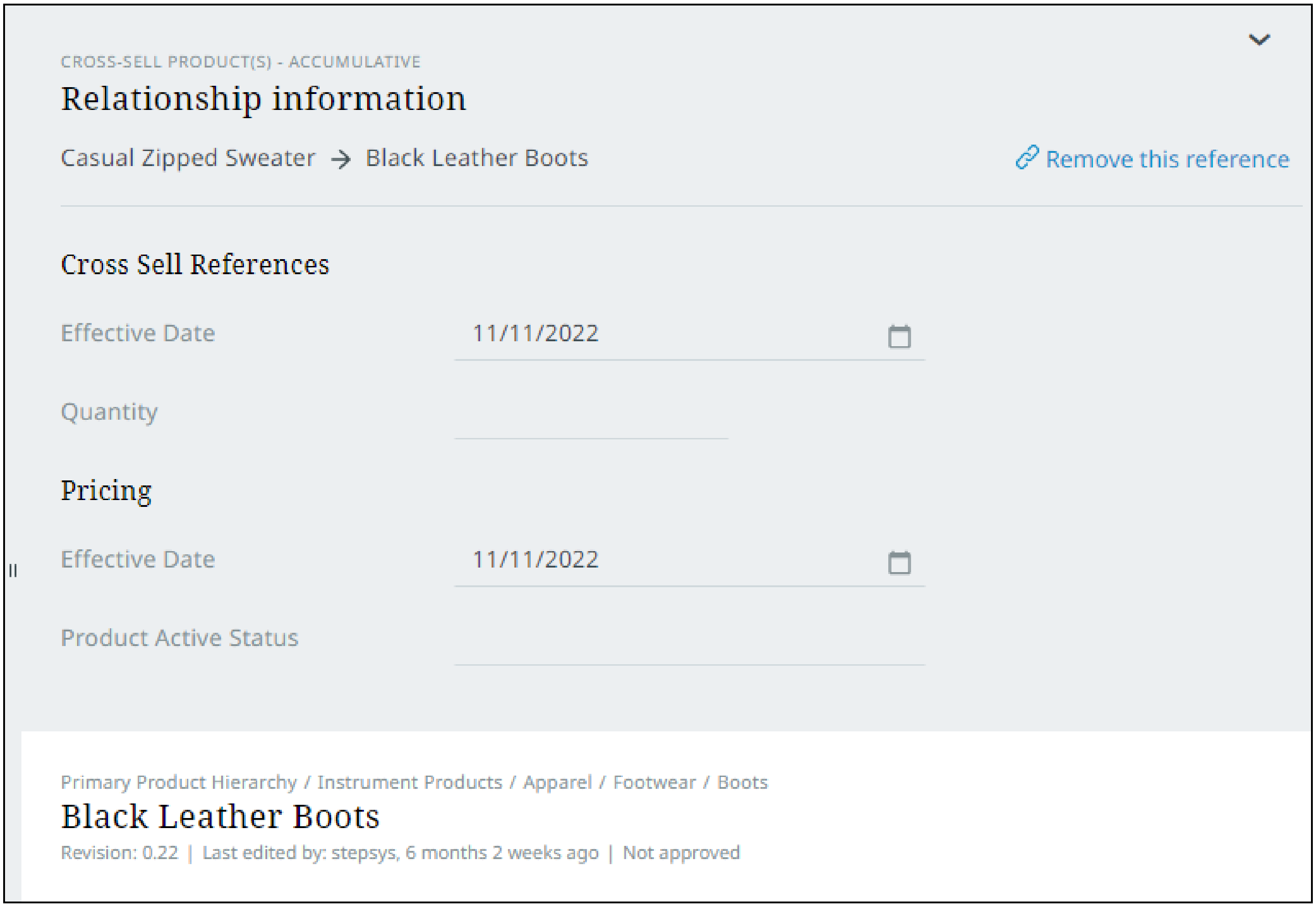
3. If a table of references is displayed, you can view a specific reference by hovering over the relevant row and clicking the arrow icon next to the checkbox of a particular reference.



You can also view a reference by selecting it from the pane.



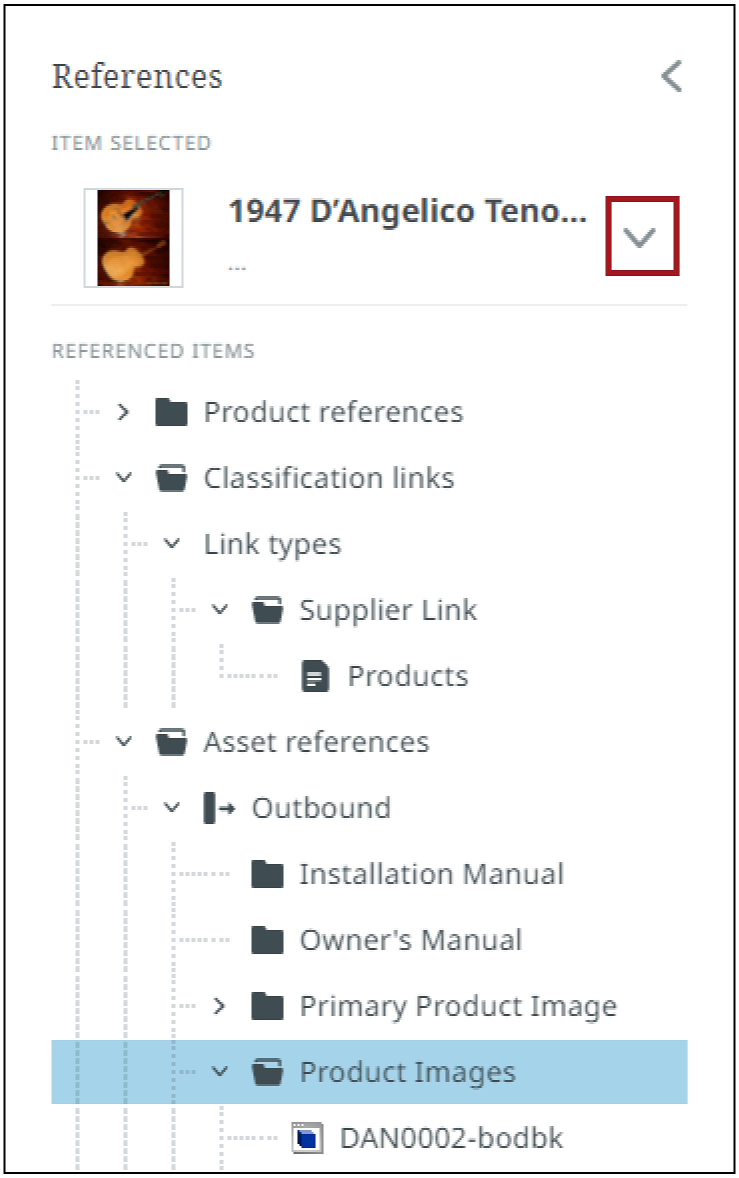
When viewing a reference, a "Relationship information" section is displayed above the reference's product details information. This section displays the reference's metadata.



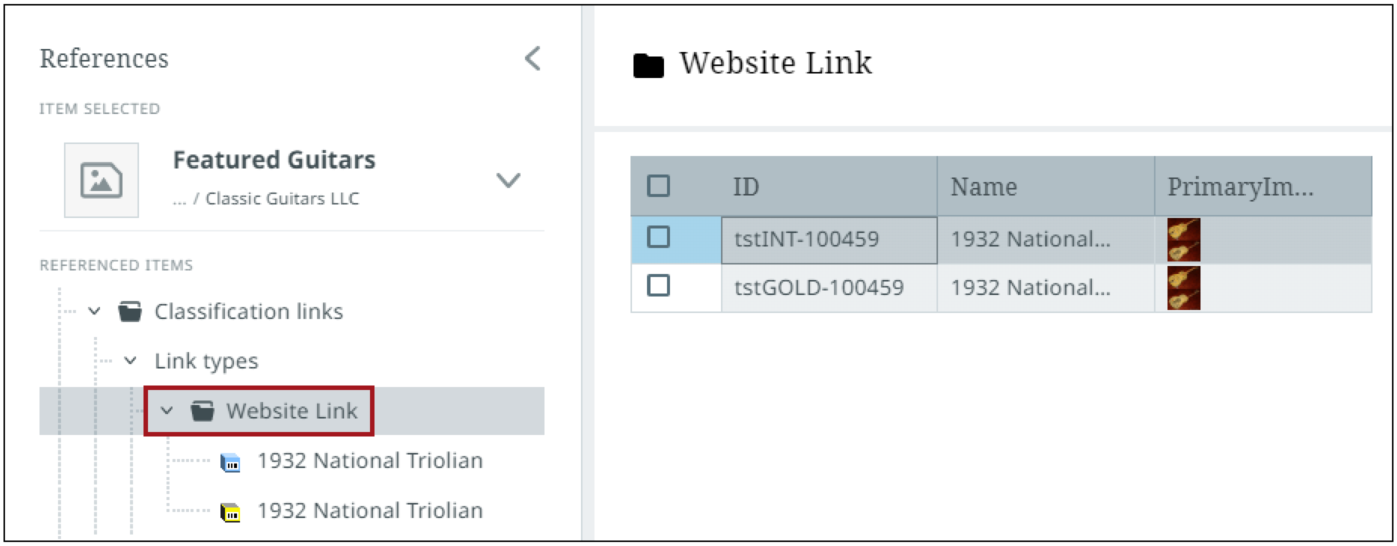
For additional information, go to the References topic.

Classification Links

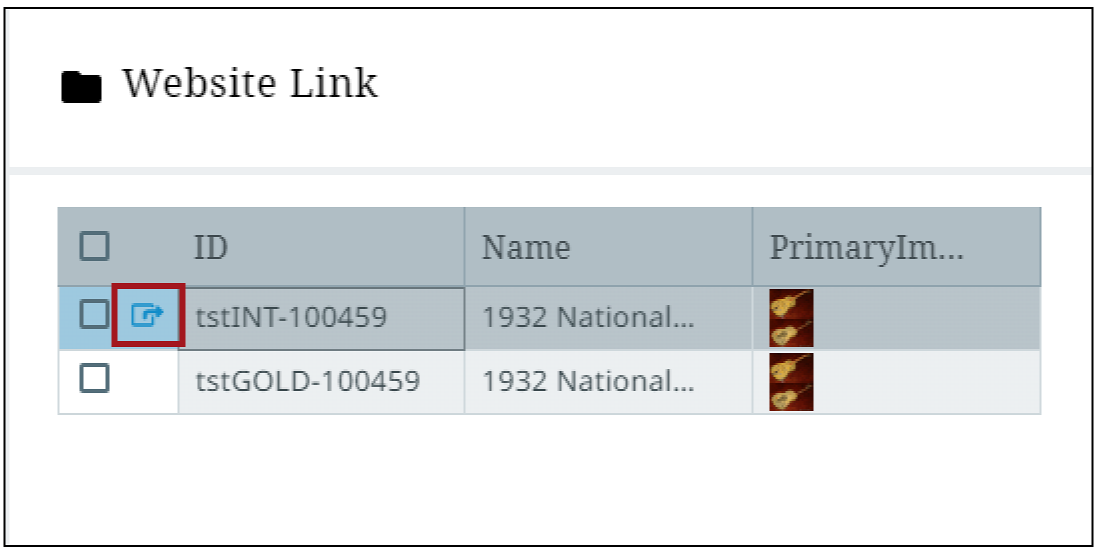
1. From the node list, select the arrow icon to view all classification links of a given product or classification. For products, the classification links are listed under "Outbound" and for classifications they are listed under "Inbound".



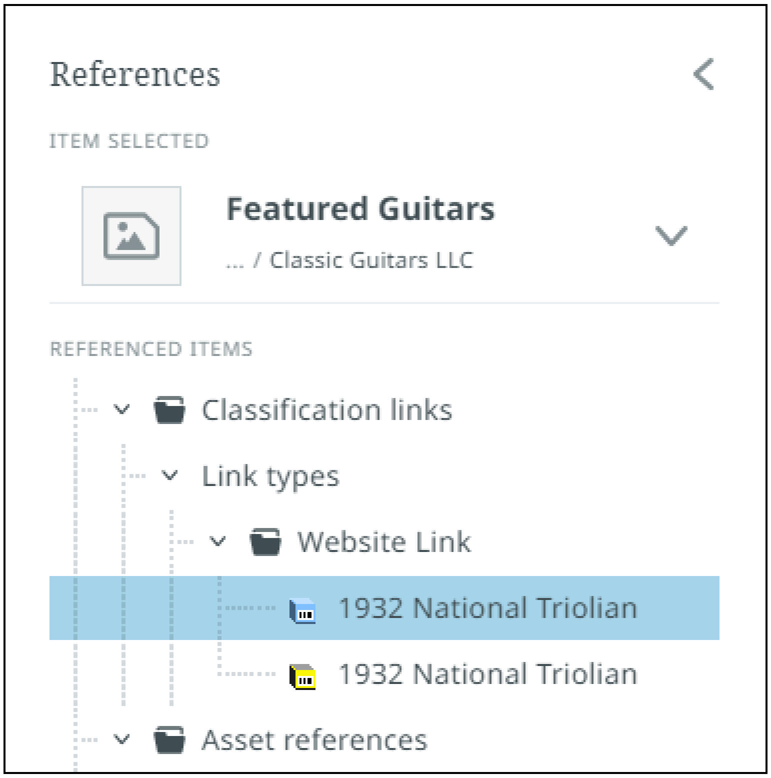
2. In the expanded list, select a classification link type to view all relations of that type connected to the product or classification. If there is only one link, it will display the details of that link in the product details pane, otherwise it will display a table of all links. Classification links listed here can also be expanded to view all links of that type within the pane.



3. If a table of links is displayed, you can view a specific link by hovering over the relevant row and clicking the arrow icon next to the checkbox of a particular link.



You can also view a link by selecting it from the pane.

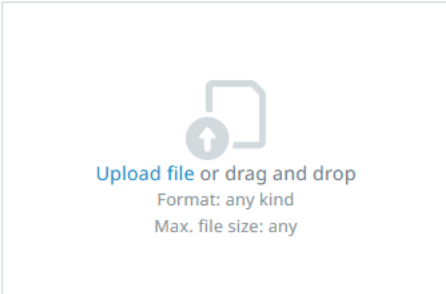


When viewing a classification link, a "Relationship information" section is displayed above the link's product details information. This section displays the classification link's metadata.

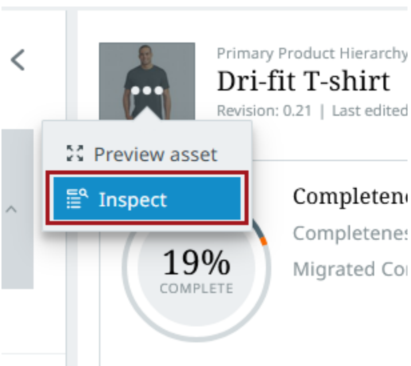
Assets

When viewing an asset classification link, appropriately privileged users have the ability to remove the asset content entirely, or replace it with different asset content, either by selecting a file from the user's local machine, or dragging and dropping a file. To either remove asset content or replace it, first click 'Remove content', found beneath the asset thumbnail.

Then upload new or replacement asset content to the empty asset object.



One way to quickly navigate to the asset details view of a given asset is to click the ellipsis button located inside asset thumbnail images found in perspectives, reference views, and in search. Select "Inspect" from the dropdown menu that displays.

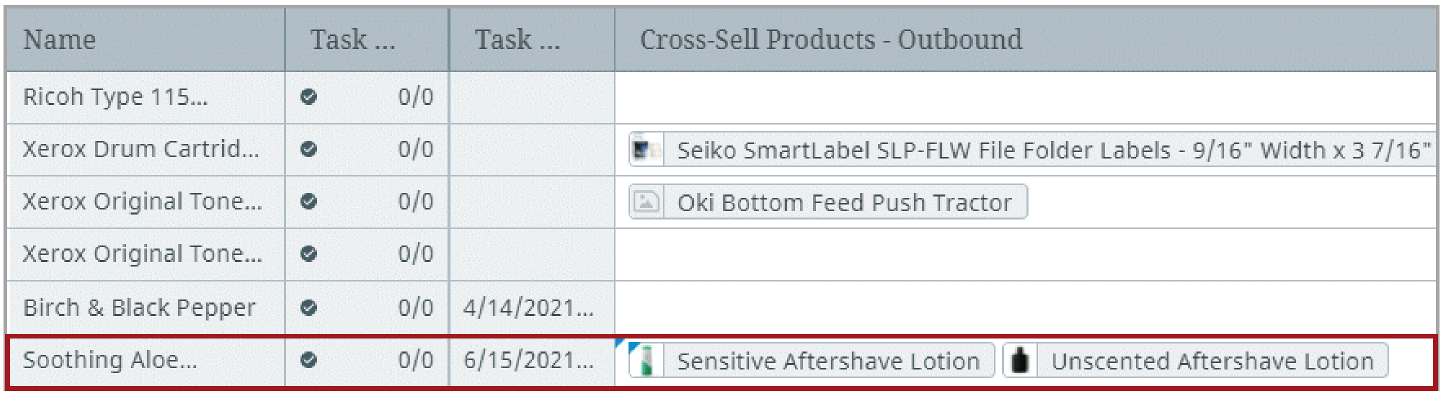


This brings up the asset details view described at the beginning of this section from which users can access asset information and take action to change or remove the asset.

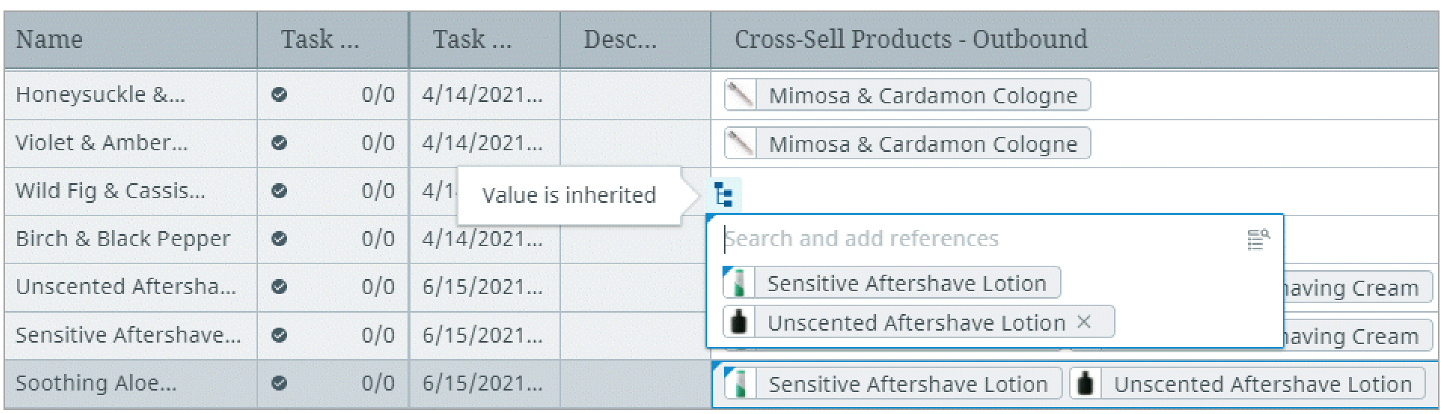
Inherited and Local References

Users can gain additional information about the status of an inherited reference when a blue triangle is present in the left-hand corner of any cell containing an inherited reference. In the case of a product with multiple references, a blue triangle can also display in the left-hand corner of the product "chip" itself, the "chip" being the shaded box inside the cell in which the product name displays.

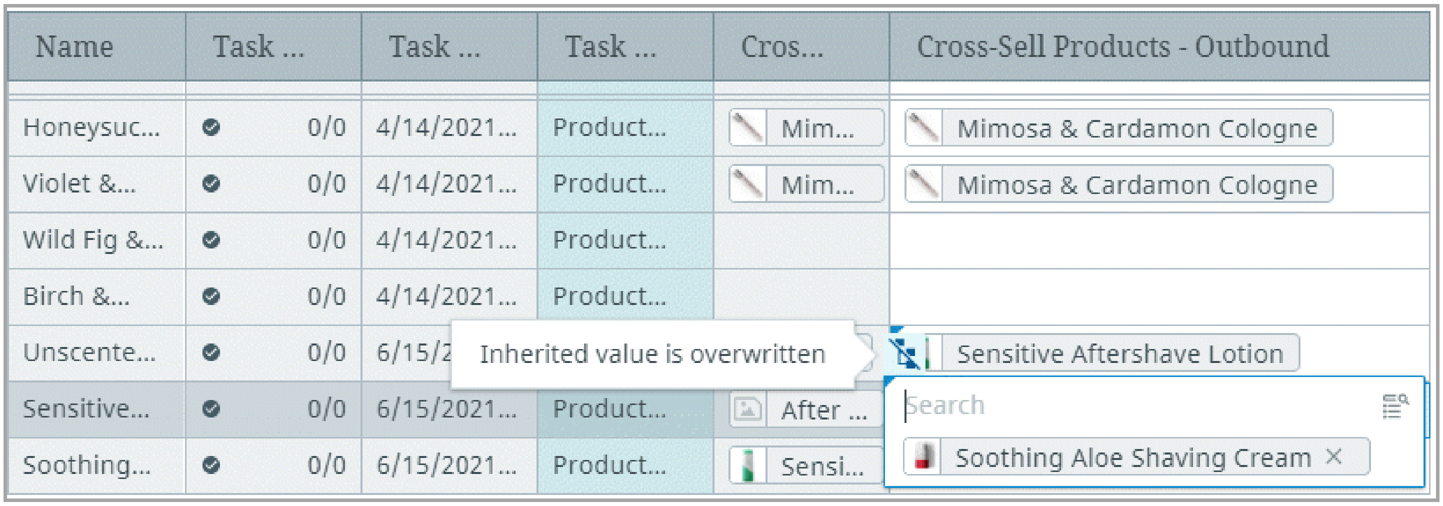
In the example below, the highlighted product contains two references of the "Cross-Sell Products - Outbound" reference type: "Sensitive Aftershave Lotion" and "Unscented Aftershave Lotion." The blue triangle in the top left corner of the cell that contains these two product chips indicates that there is at least one referenced product that is inherited. In this case, the "Sensitive Aftershave Lotion" product is inherited, as indicated by the blue triangle on the product chip itself, while the "Unscented Aftershave Lotion" product chip is a local reference (not inherited reference), indicated by its lack of a blue triangle.



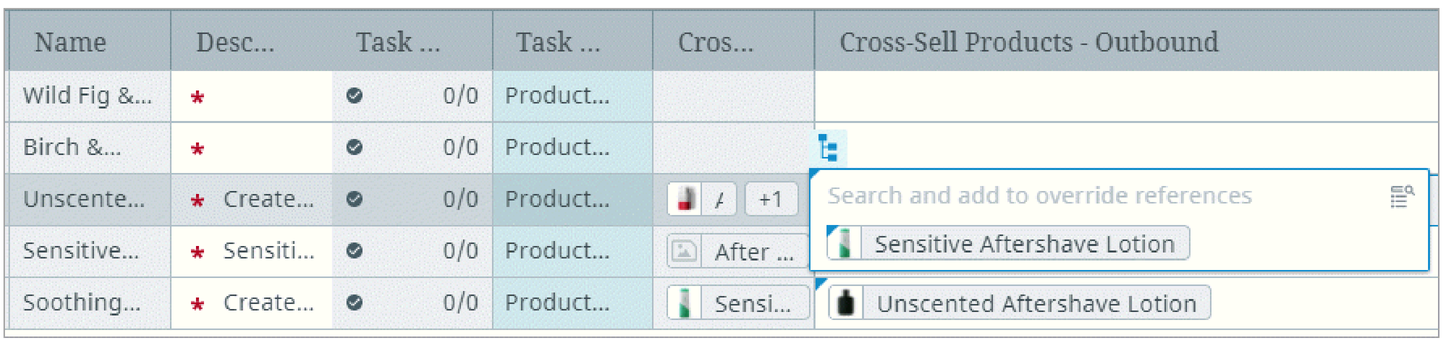
When a cell that contains a referenced product is double-clicked, an icon that represents hierarchical inheritance, along with informational text, is displayed above the cell.



In the example below, notice that the hierarchical inheritance icon has a line through it. This indicates (and is described by accompanying informational text) that the referenced product is local, and has overridden the inherited product reference. If a user wishes to remove the local reference (and has the proper user privileges), they can do so by clicking the "X" located on the product chip. Once this local reference is removed and the page is refreshed, the inherited referenced product will appear within the cell.

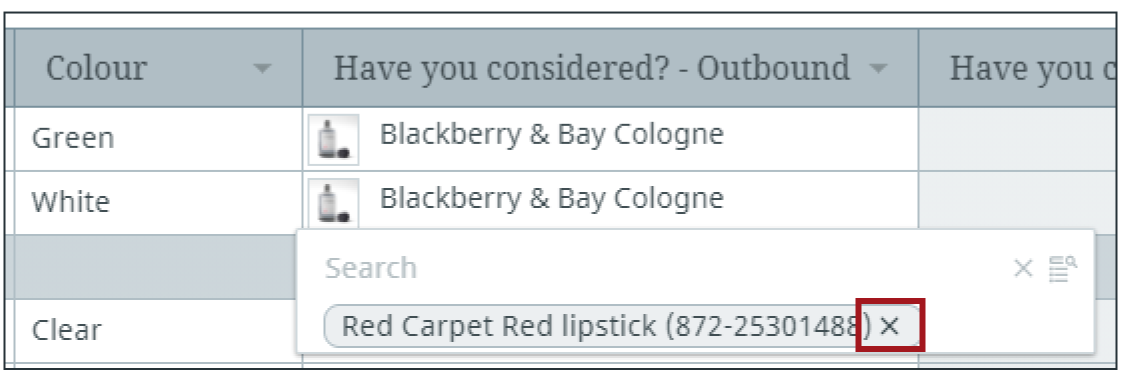


When double-clicking on a cell which only contains inherited referenced products, users will be notified that adding a different referenced product will override the existing inherited referenced product.



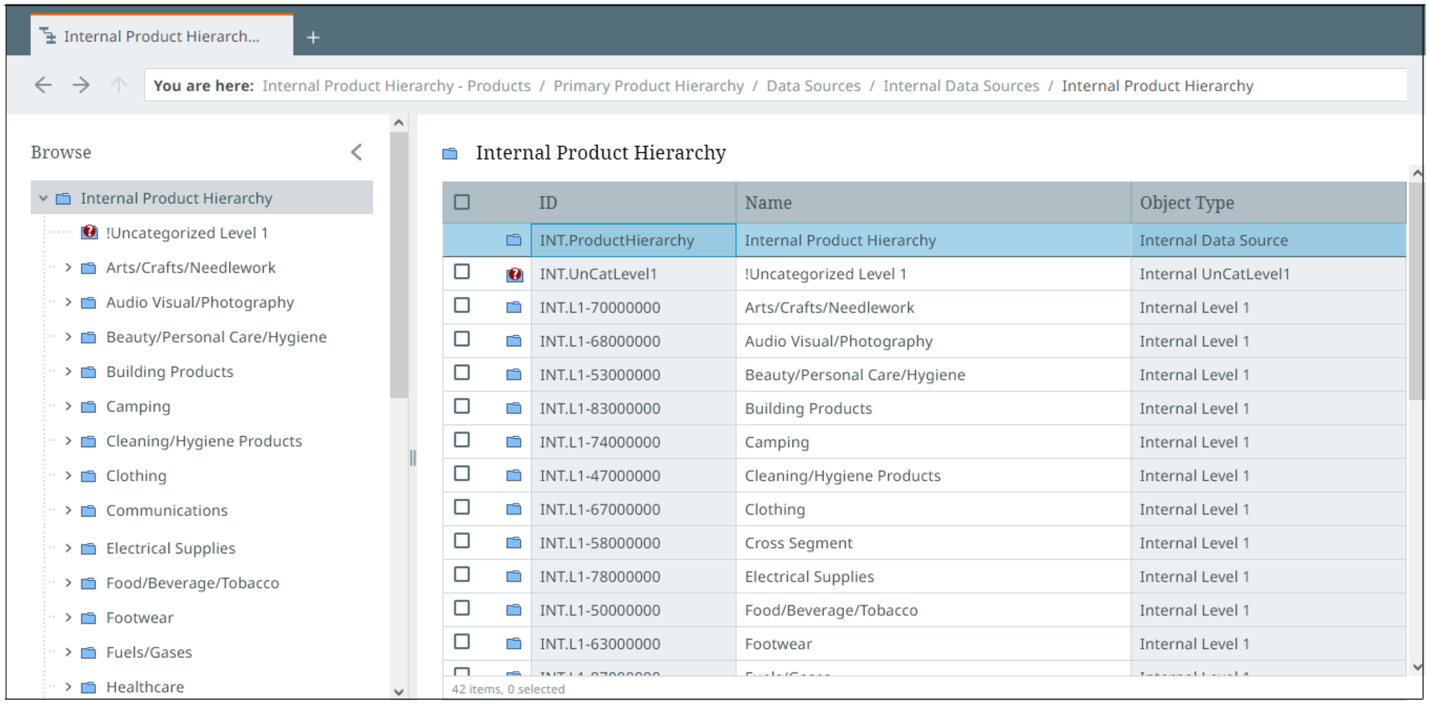
If you want to remove a local reference, select the "X" icon beside the reference in the cell.

Note: Inherited references cannot be removed (there is no "X" option for inherited references).



Browsing Data

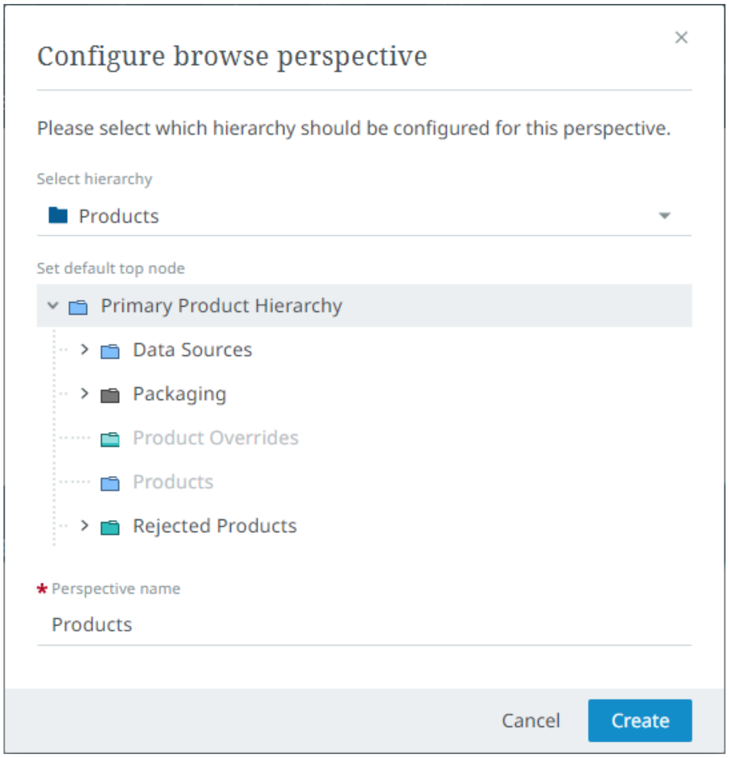
Data can be freely explored via the Browse perspective. Like other perspective types, Browse perspectives display your data in a customizable table. Objects in this perspective can be viewed in more detail by selecting them from the table.



Navigation Tree

The navigation tree resides on the left side of the perspective and allows you to browse through a hierarchy of products, entities, assets, or classifications. This hierarchy draws nodes directly from the data model and may restrict access to parts of the data set based on the user's permissions.

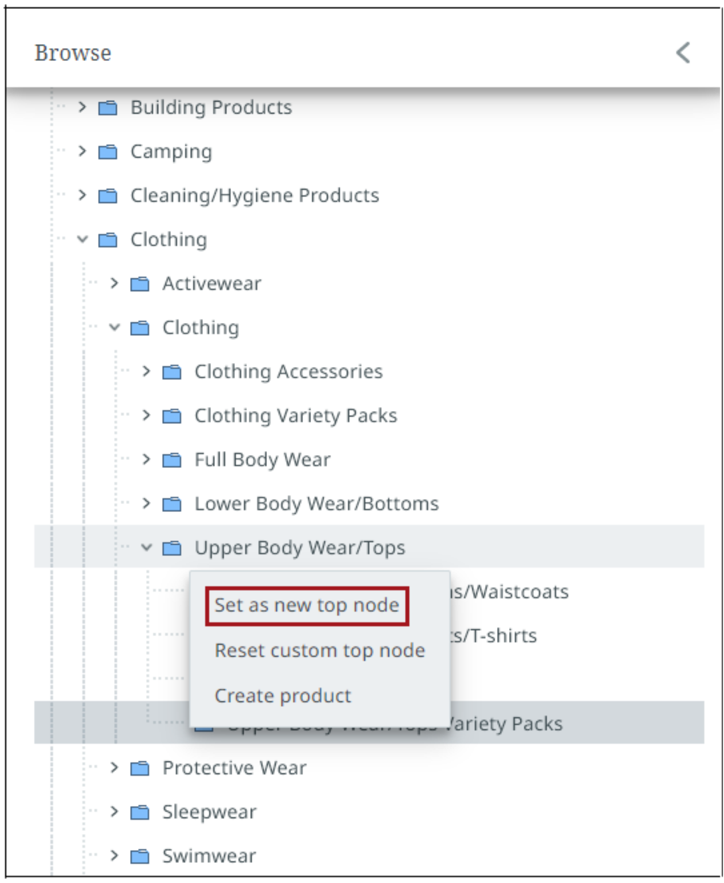
Each Browse perspective focuses on a specific hierarchy that is determined when creating it for the first time.



To navigate down to the deeper levels of the tree, select the arrow icon to open relevant nodes. When you have arrived at the desired node, select it from the tree to open a table comprising all the objects within that node.

Note: When navigating a Classification hierarchy any linked objects will not appear in the tree. Instead, linked objects can be viewed via the node list that populates when selecting a classification in the details view or in a table when using the list view.

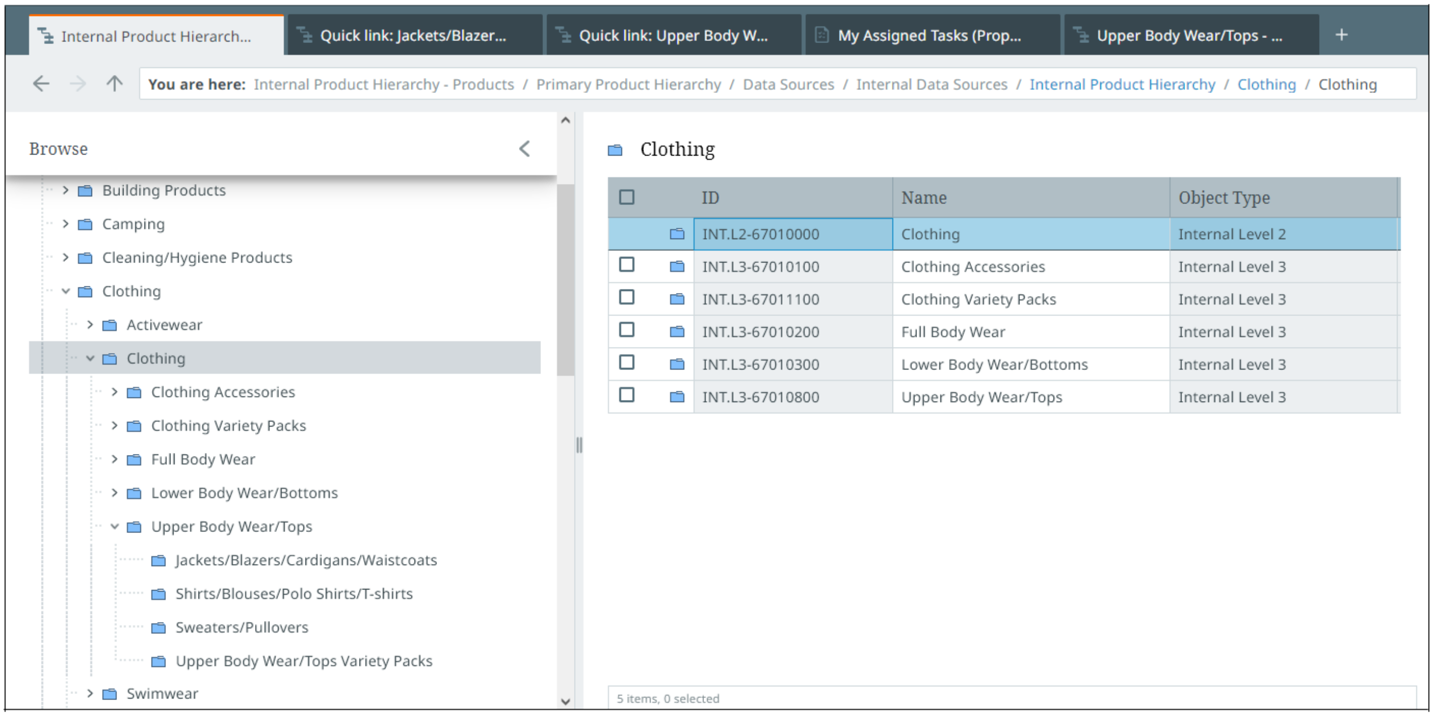
The top node of the hierarchy can be changed at any time by simply right-clicking the desired node and selecting **Set as new top node** from the context menu.



This selection can be undone by right-clicking any node in the hierarchy and selecting **Reset custom top node** from the context menu.

List View

When viewing a Browse perspective via the list view, it will display all objects within the selected node on a table. Similar to other perspective types, this table is customizable.



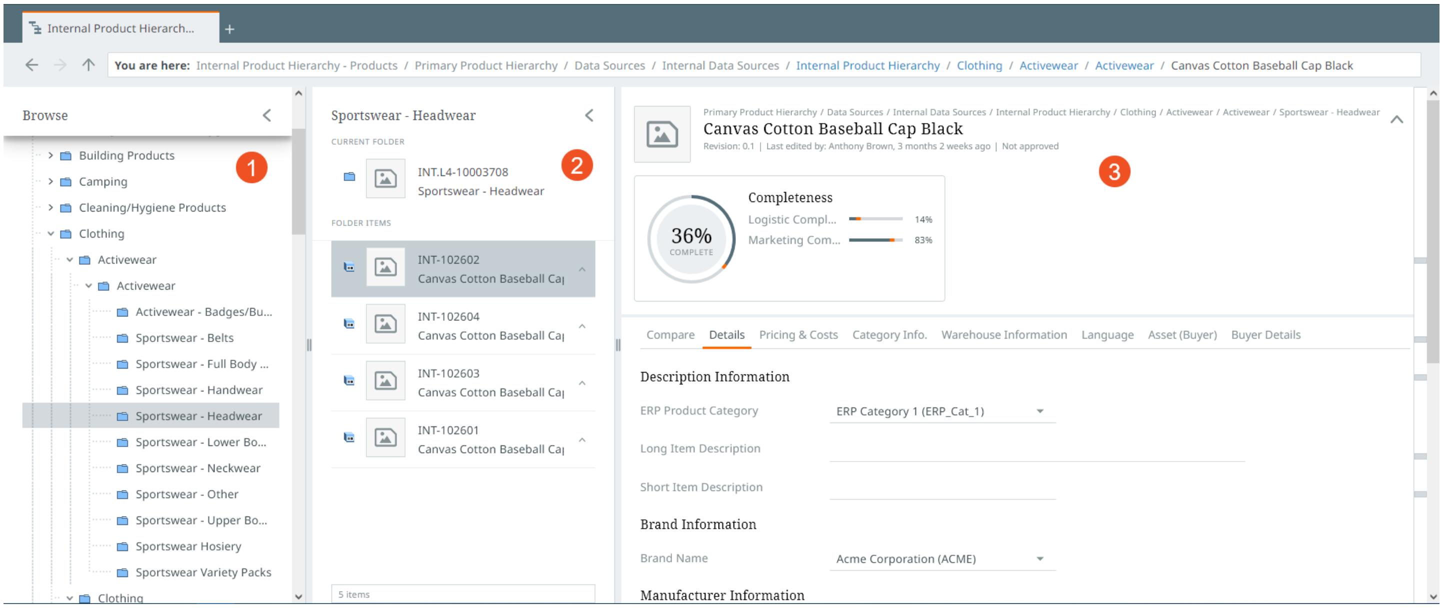
Selecting an object from the table will open it up in the details view (shown below).

Important: The Select All option, found in the header row of the table, allows you to select all items in a table. Alternatively, you can select up to 500 items manually by checking the checkbox for each desired item. Refer to the Toolbar topic for other maximums that you need to consider when taking actions on perspective selections.

Details View

When viewing a Browse perspective via the details view it will split the screen into the following sections:

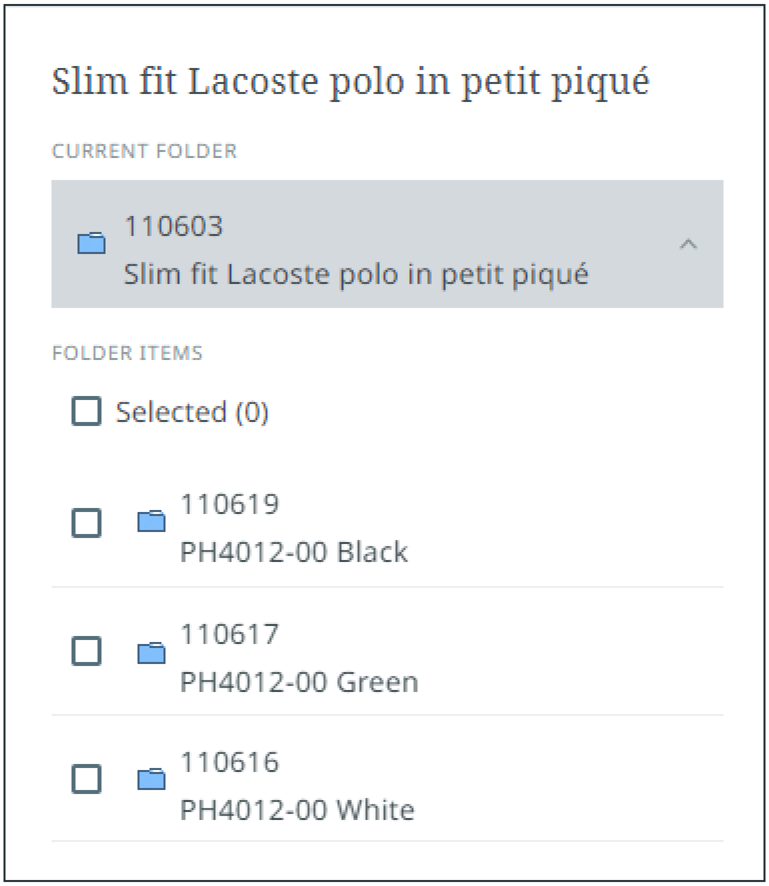
1. Navigation tree (explained above)
2. Node list
3. Node details



Node List

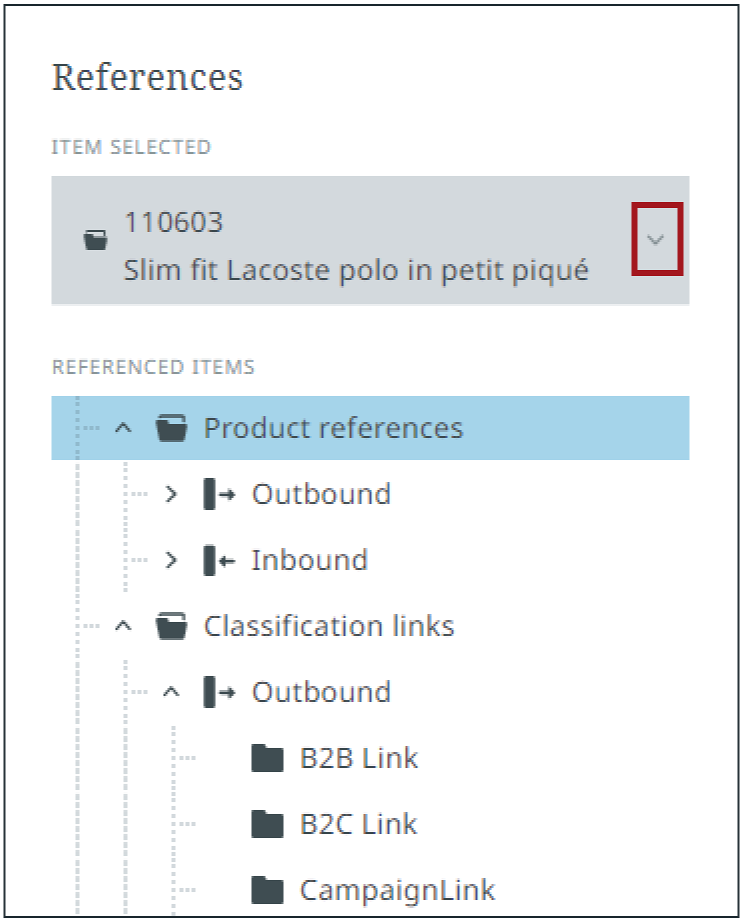
All objects listed under the node selected from the tree will appear in a list in this section. When selected, the node details pane to the right will populate with relevant data.

The "Current Folder" navigation card displays the node you currently have selected in the navigation tree and the "Folder Items" section below lists out all of the child objects. In the example image below, the current folder is a classification and the folder items are its linked products.



Clicking the arrow beside an object in the list will display all of its inbound and outbound references, as well as any classification links. Refer to Product references and classification links for more information.

To return to the product / classification list, select the arrow icon next to the selected item.



Node Details

When an object is selected from the node list it will populate additional node data on the pane to the far-right of the screen.

Creating New Objects within the Browse Perspective

You can create products, classifications, and entities one at a time within the Browse perspective or the Tasks perspective. Refer to the Creating and Initiating a New Object within the Tasks Perspective topic for additional information.

Why single products? As an example, a new product may be needed for the internal record-handling workflow, which does not originate from external record imports (PDX). This becomes necessary for planning purposes in the case for products that do not exist yet (a placeholder is required), which will be enriched by a vendor at a later time. Such products are often referred to as “white label” products, which are sold by retailers with their own branding and logo, but the products themselves are manufactured by a third party.

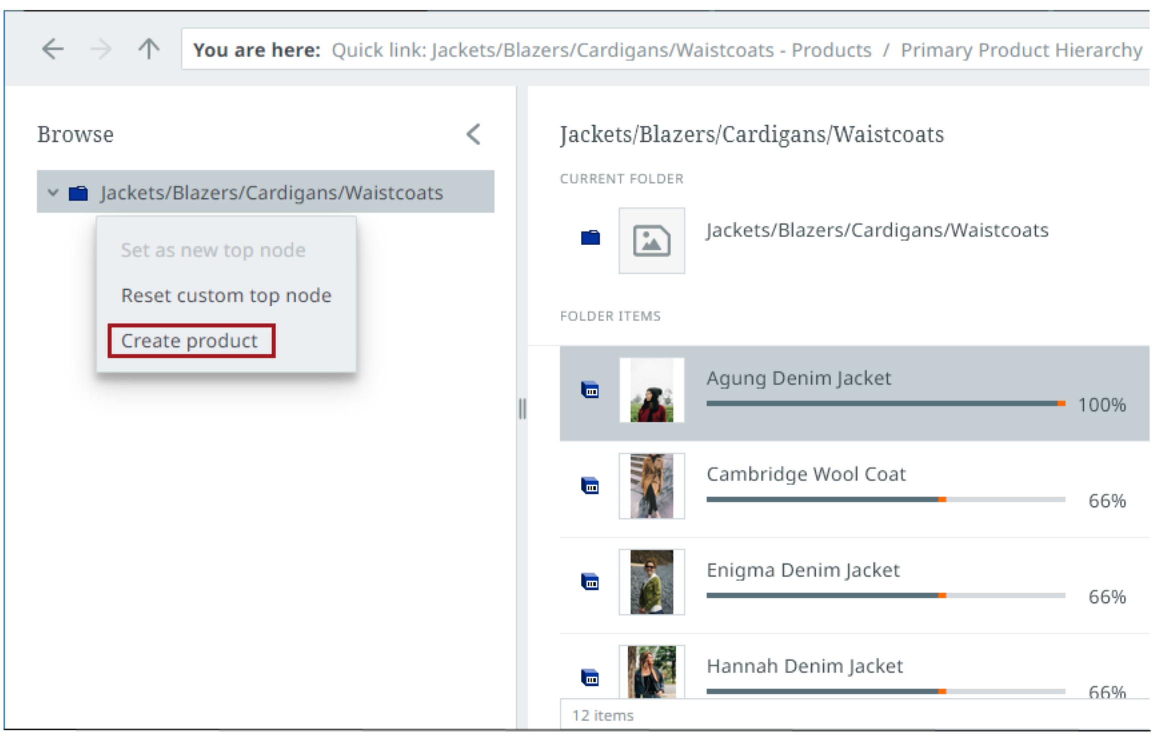
You can also create classifications using the same methods described below. Classifications can be used to build hierarchies and objects that bundle other objects into organized groupings, or product objects can be linked into classifications to provide alternative categorizations of objects that vary from the product hierarchy structure.

Choosing a Node

The examples below mainly show the product creation process. The process for creating classifications and entities within a classification or entities hierarchy will be the same or similar.

Where in the hierarchy the product ,entity, or classification is created is derived from the currently selected location in the Browse perspective. Right-click on the Browse perspective menu at the point where you want to add the object.

Note: If the object type selected for the new object has an 'Object creation' action configured in the Configuration tool, the parent node of the newly added object will be overwritten to be location in the hierarchy where the user right-clicked within the Browse menu. Refer to the Configuration Tool Actions topic for additional information.



Valid options are enabled as shown in the example above:

Set as new top node: Resets the top node of the browse tree.

Reset custom top node: Returns the top node to the default node set for the Browse perspective.

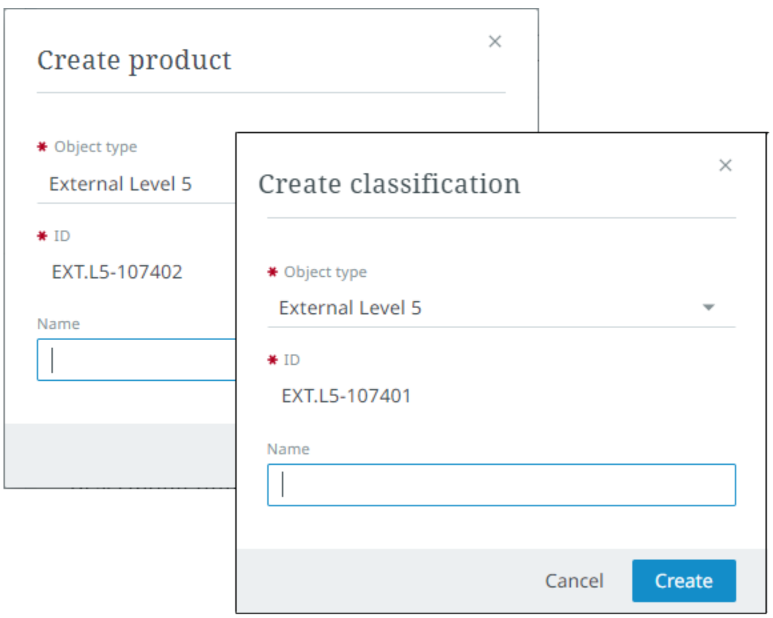
Create product / **Create classification**: Creates a new object.

Any invalid options for the node that you are on will be grayed out.

Creating a New Object

The 'Create product,' 'Create Entity,' or the 'Create classification' dialog appears, depending on the type of new object you are creating:

- **Enter the Name**: A name suggestion is given, if configured to do so.
- **Select the Object type**: Only valid object types are shown.
- **Enter the ID**: If auto-ID is configured to be used for the selected object type, then this field will populate for you.

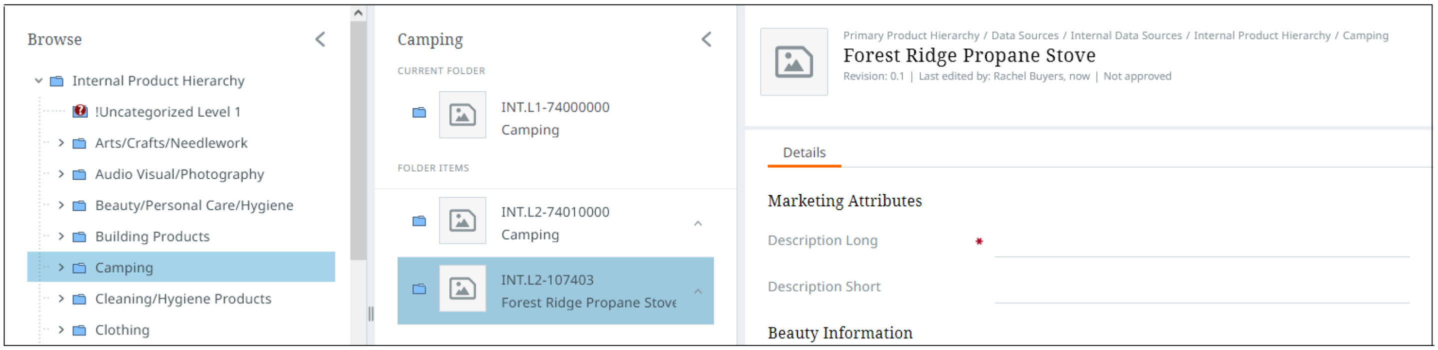


Select Create to finish (or Cancel to start over).

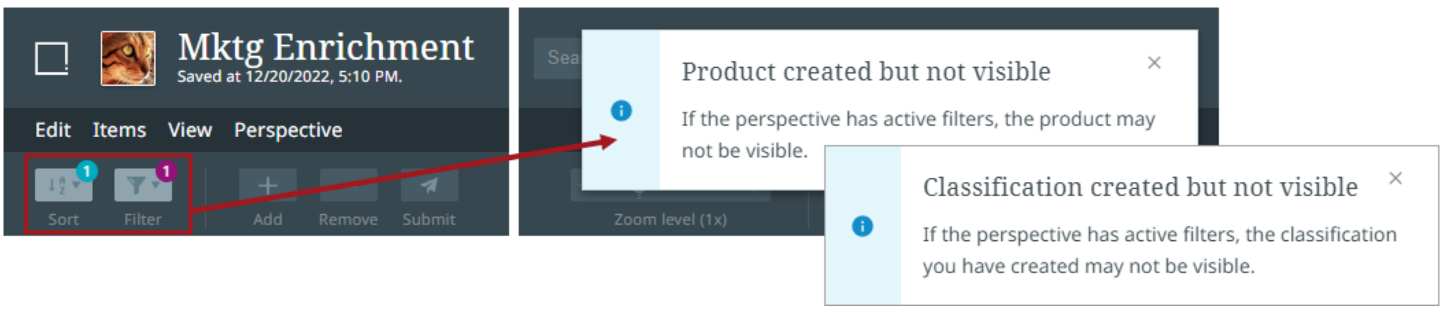
Enriching Objects

Upon creation, you will be taken to a details screen where you can enrich the newly created object and, if desired, initiate it to a workflow (Toolbar / Menu).

> **Note:** If the object type selected for the new object has an 'Object creation' action configured in the Configuration tool, the new object will automatically be initiated into the defined workflow. Refer to the Configuration Tool Actions topic for additional information.



If the newly created object cannot be viewed in the current perspective, then a notification displays. For example, if the Browse perspective data set is filtered and the filtering is not applicable to the new product or classification, the screen will not automatically navigate to the new object but will provide information on why a detailed view cannot be shown.



You can access these objects by navigating to them via normal means.

Details View Tiles

In the details view for both the Tasks or Browse perspectives, a series of data tiles are available that provide clear metrics about the objects in your hierarchy or workflows. The completeness and sufficiency tiles give you a view of how enriched an item or group of items are. A workflow visualization feature displays information about your products in workflows, including how far along your product is in one or more workflows.

Instrument provides these tools so users can quickly and accurately evaluate product data quality, completeness, and vital workflow information to better enable fast and timely product data delivery.

Users have the following tools available to determine data quality, data completeness, and workflow information: the Completeness Tile , the Sufficiency Scores Tile, and the Workflow Tile. The tiles are described in this section.

Important: It is important to read the information within online help around sufficiency scores and product completeness. There are specific privileges that are required to calculate and view sufficiencies. For more information, start here: Sufficiency Scores for Data Quality and Completeness.

Workflow Tile

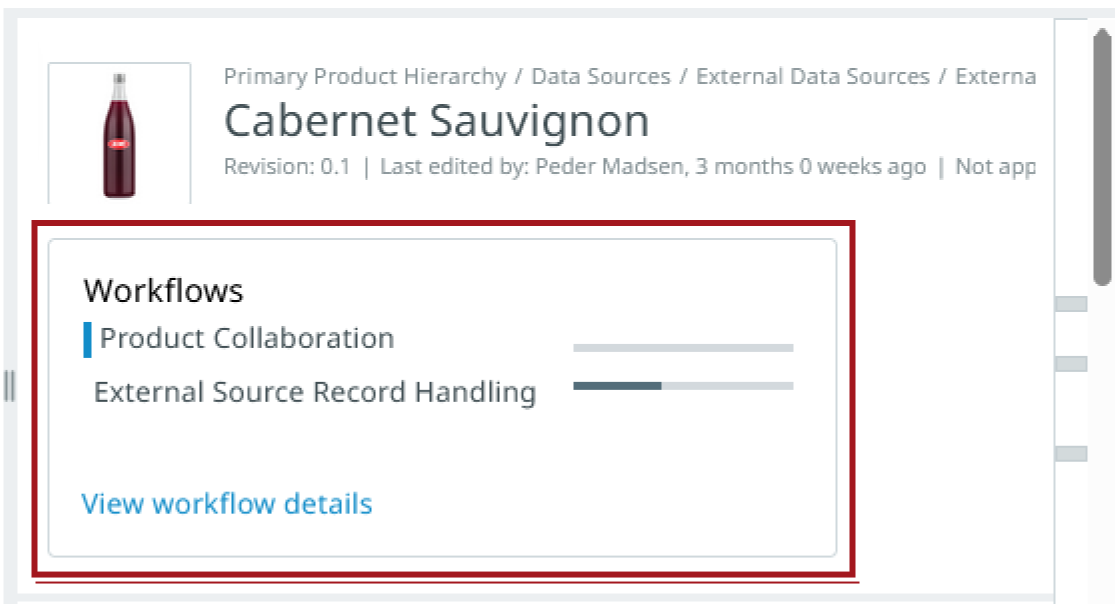
The Workflow Tile displays relevant information about an object's status in workflows, and provides access to additional, more granular information about a specific object's presence in one or more workflows. The Workflow tile can be found above the tabs in the details view in either the Browse, Tasks, or Collections perspectives. Whether it displays in your UI is conditional: if the viewed object is valid for any workflow, the tile displays to users. If the object is not valid for any workflow, the tile does not display.

Configuring the Workflow Tile

To fully configure the Workflow tile, users can configure a progress bar for each non-system workflow state an object will travel through. Configuration of the progress bar is completed in the workflow designer, which is accessible via the STEP Workbench. For more information on this step, review the Progress Bar In Workflows topic. If no progress bar is configured, workflows will display without the progress bar.

Using the Workflow Tile

To find the Workflow tile, navigate to any object currently in a workflow, and click the 'Details' button to toggle out of the table view. If applicable, the Workflow tile displays above the tabs.

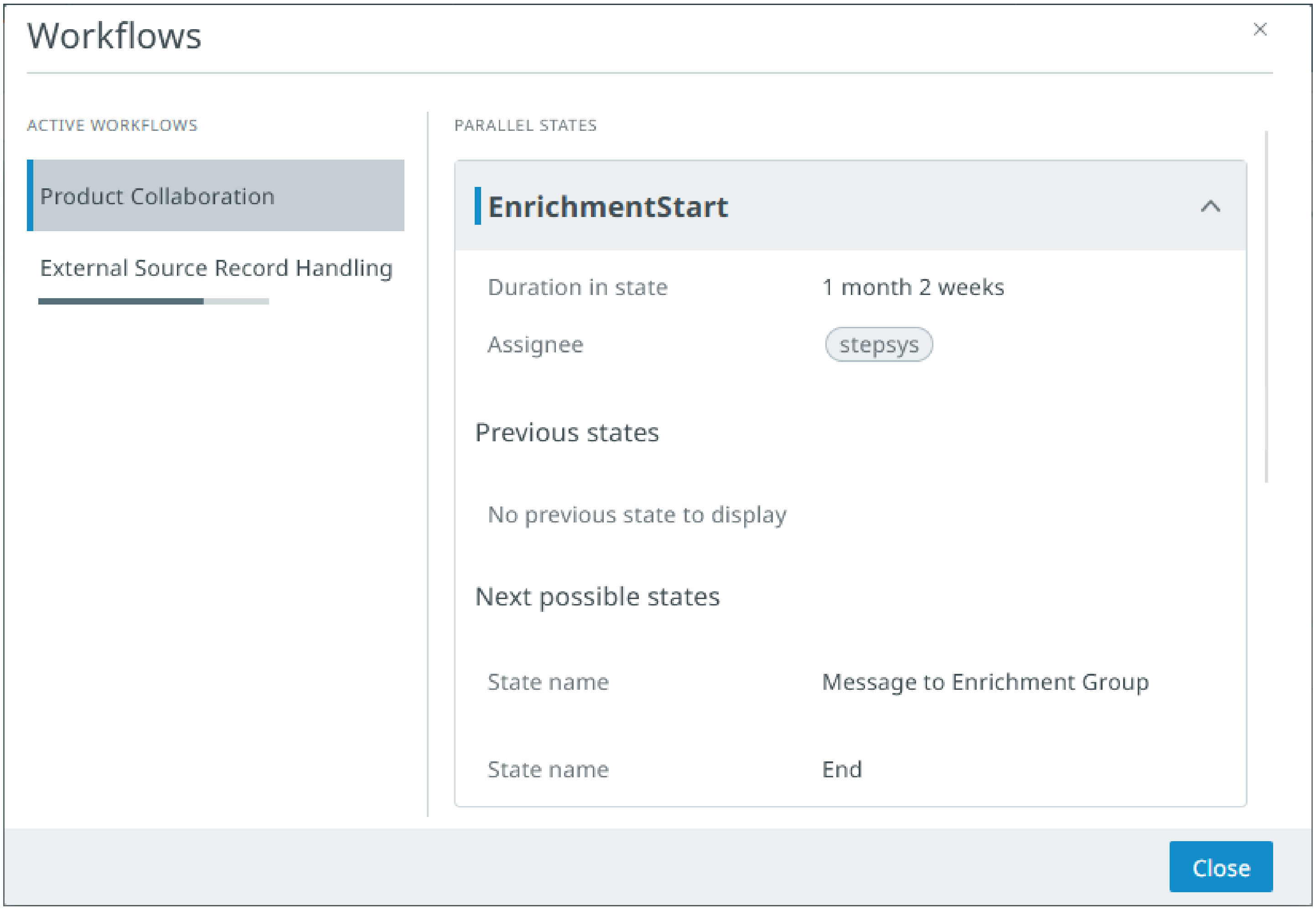


The Workflow tile lists all workflows in which the selected object currently resides. Beside each listed workflow is a progress bar, configuration of which is referenced in the 'Configuring the Workflow Tile' section just prior to this section.

A 'Workflows' window that provides users with more granular detail about the workflows in which the object resides can be accessed one of two ways. Either by clicking:

- the 'View workflow details' link button at the bottom of the Workflow tile
- any of the workflow names listed in the Workflow tile

When the 'Workflows' window is accessed by clicking a specific workflow name, the window opens showing details about the object in the selected workflow. When the window is accessed by clicking 'View workflow details,' the details of the first workflow will display when opened by default.



The 'Workflows' window is comprised of two parts: a column to the left that shows 'Completed Workflows' and 'Active Workflows' sections, and a details section to the right.

The 'Active Workflows' column lists all workflows in which the viewed object resides, along with a progress bar configured for the workflow states that comprise the workflow. If, for instance, the object resides in a workflow state configured to represent 50% progress through a workflow, the progress bar will display as half-full. If the list is longer than can be easily shown in the confines of the default window space, a scroll bar will display that enables access to all workflows. To review additional details about the object in any of the listed workflows, the user can click the relevant workflow name in the list. This prompts display of metrics about the object in that workflow in the details section.

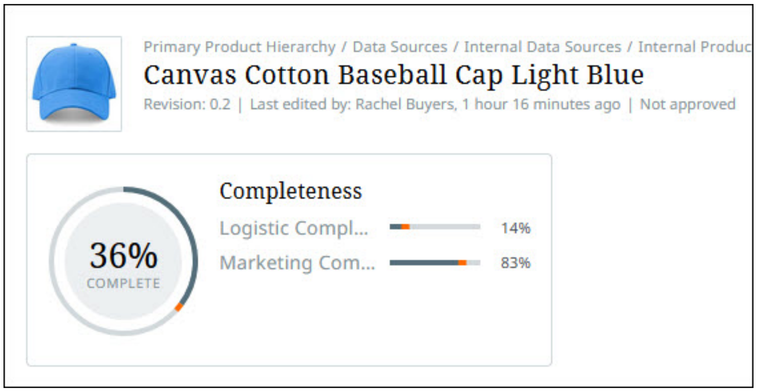
The details section of the 'Workflows' window lists the following data points:

- the name of the workflow state in which the object resides
- how long the object has been in the state (under 'Duration in state')
- who the object / task is assigned to when in the workflow state
- the previous workflow state the object resided in just before the current state
- the next workflow state the object will progress into when it moves out of the current state

To end display of the 'Workflows' window, click the 'Close details' button in the bottom right-hand corner of the window.

Completeness Tile

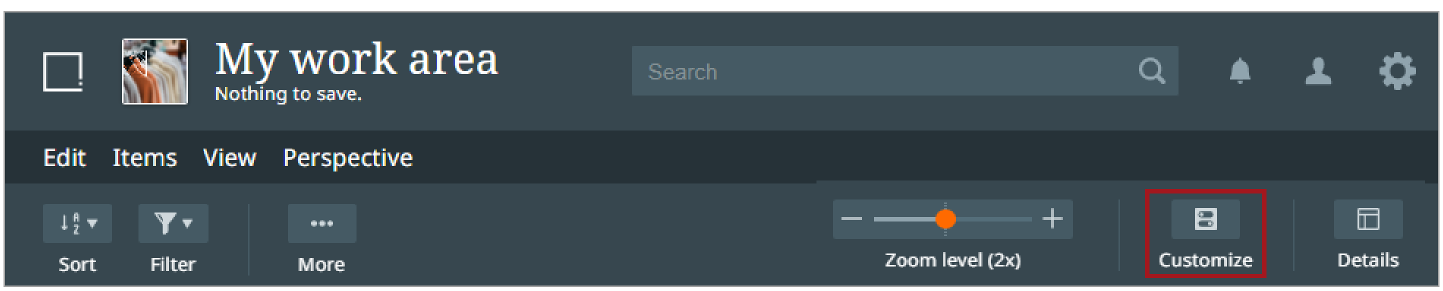
Completeness is a measure of how well a given product has been enriched with product data and is signified via a pre-configured score. Often, this score is determined by how many important attributes have been enriched with values. The Completeness tile displays data quality based on a percentage score. The percentage score itself is determined by metrics that check the attribute values of a specific product.

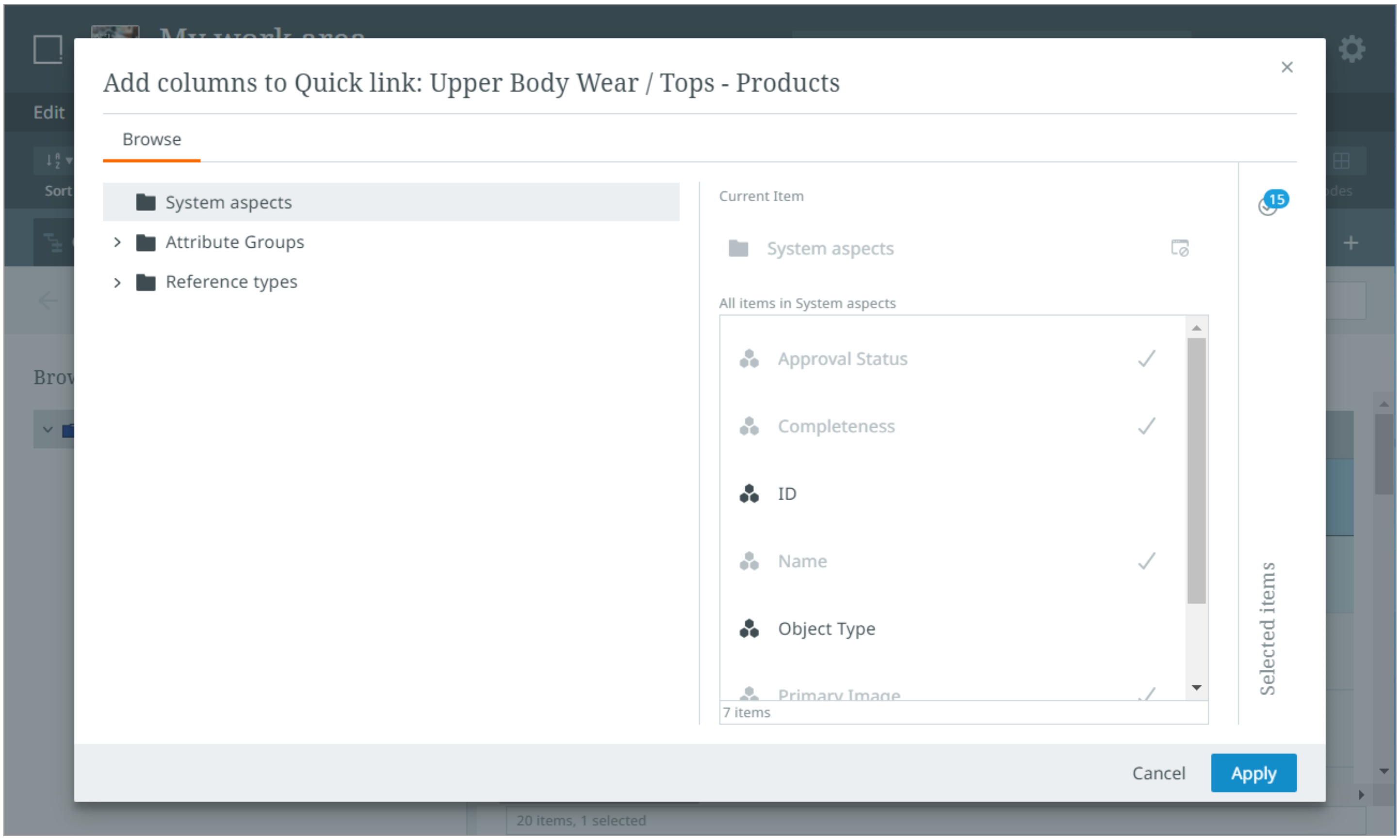


In the image above, there are two completeness scores given, each based on a metric used to determine data completeness. The first score (36%) is based on the default metric, and is shown in the circle within the Completeness tile. Clicking on this circle provides more details about the default metric and what factors were applied to generate the percentage score.

Note: The location of the attributes with incomplete values (as determined by the metric) can be located on the details page by first toggling the Display on side panel switch, and then either hovering the cursor over the flag icon indicator in the side panel, or clicking on the specific attribute link.

Completeness scores for products (based on the default metric) can also be viewed and accessed in the list view by adding the Completeness option via the Customize toolbar action.



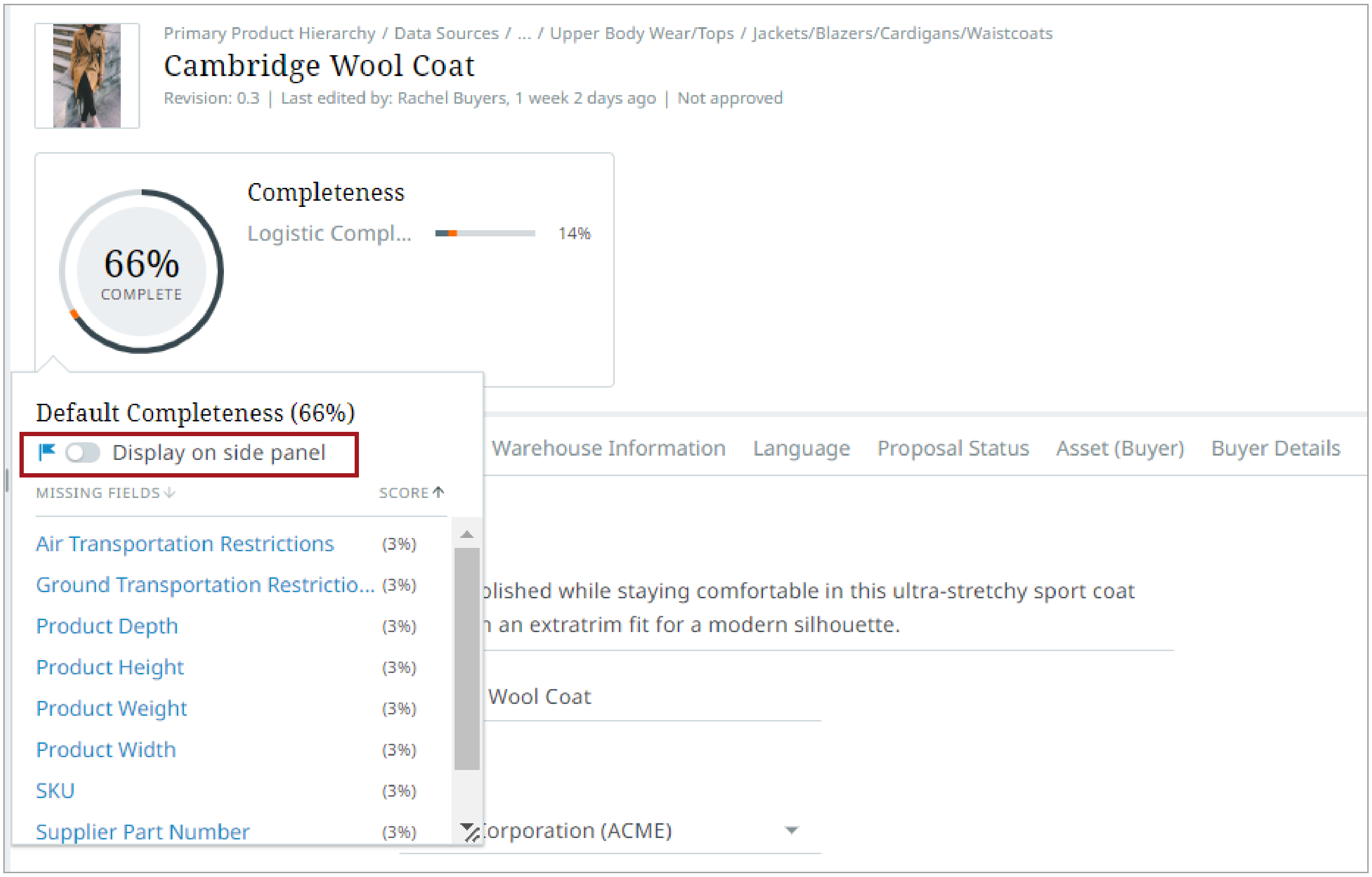


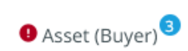
For more information, refer to Customizing columns.

Once the Completeness column is added, the completeness score (based on the default metric) for individual products can be viewed in the list view.

	ID	Prima...	Name	App Description Long ...	Completeness
	201653		English Pear & Freesia perfume	* Our first fragrance....	56%
	201656		Nectarine Blossom & Honey...	* Our first fragrance....	79%
	201657		Orange Bitters cologne	* Our first fragrance....	73%

Additionally, when the "Display on side panel" toggle is engaged, a blue circle icon will display to the right of the tab label for the tab that contains attributes that are missing attributes that contribute to the item's configured Completeness. Inside the circle is a number indicating how many Completeness-related attributes are missing required values. Sufficiency-related attributes may also contribute to the number in the blue circle if a Sufficiency is configured, has relevant attributes on the tab, and the "Display on side panel" toggle for the Sufficiency has been activated.


Primary Product Hierarchy / Data Sources / ... / Upper Body Wear/Tops / Jackets/Blazers/Cardigans/Waistcoats
Cambridge Wool Coat
Revision: 0.3 | Last edited by: Rachel Buyers, 1 week 2 days ago | Not approved
66%
COMPLETE
Completeness
Logistic Compl...
14%
Default Completeness (66%)
Display on side panel
MISSING FIELDS
SCORE
Air Transportation Restrictions (3%)
Ground Transportation Restrictio... (3%)
Product Depth (3%)
Product Height (3%)
Product Weight (3%)
Product Width (3%)
SKU (3%)
Supplier Part Number (3%)
Warehouse Information
Language
Proposal Status
Asset (Buyer)
Buyer Details
plished while staying comfortable in this ultra-stretchy sport coat
n an extratrim fit for a modern silhouette.
Wool Coat
Corporation (ACME)

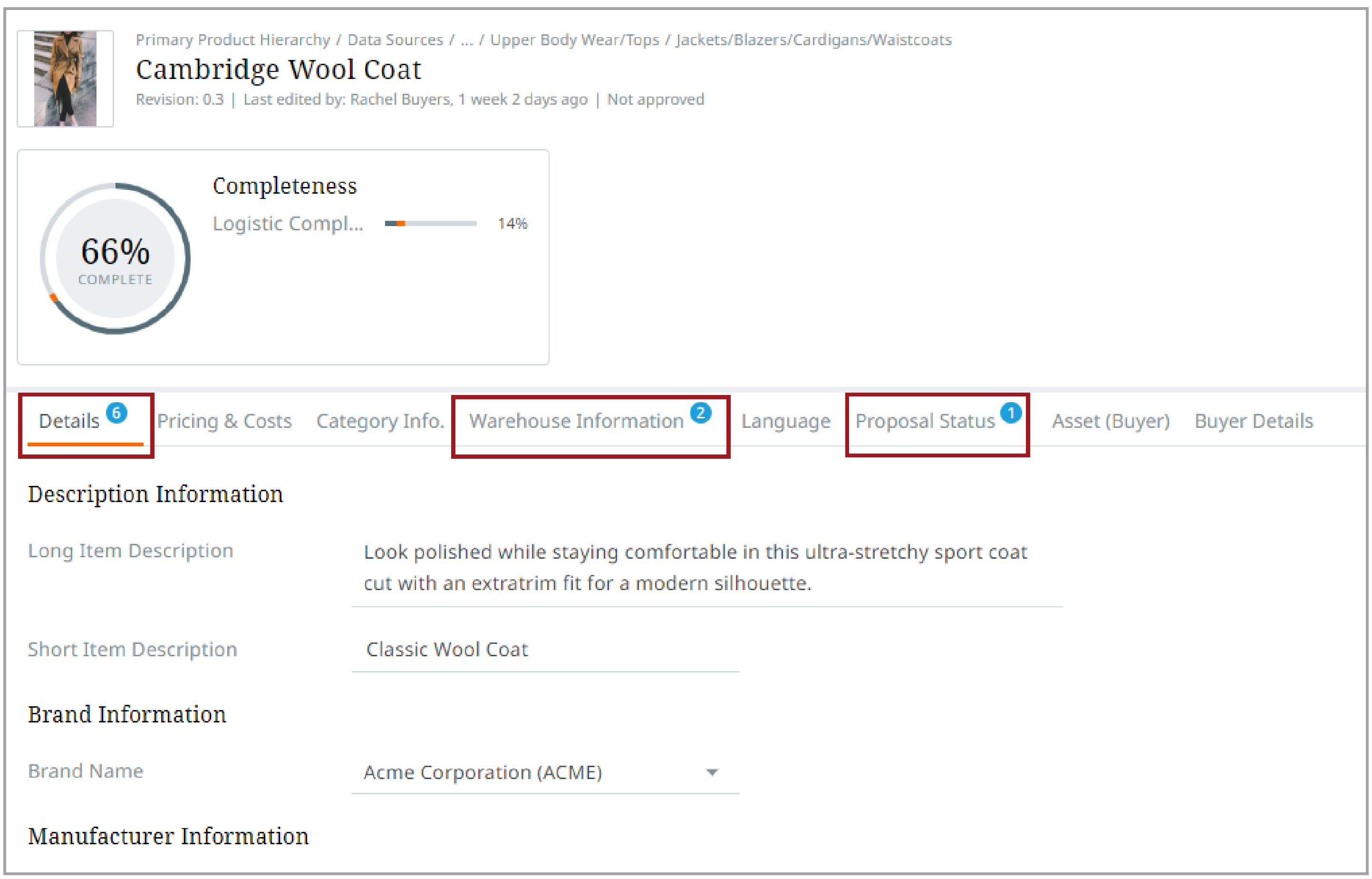

Asset (Buyer)
3

Sufficiency Scores Tile

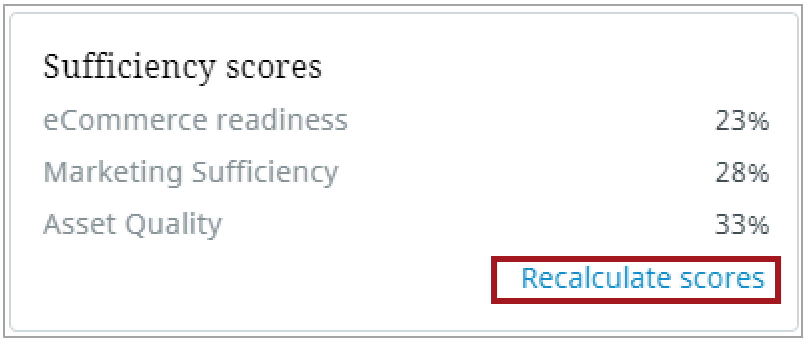
Similar to a Completeness tile, the Sufficiency scores tile can be used to check for product data quality and completeness. While the Completeness tile contains and displays scores for metrics applicable to specific products, the Sufficiency scores tile contains and displays scores for the sufficiencies applicable to specific products.

Users can click on the Sufficiency scores tile to access more information about individual sufficiencies. In the example below, there are three sufficiencies within the Sufficiency scores tile: "eCommerce readiness," "Marketing Sufficiency," and "Asset Quality." Clicking on an individual sufficiency displays information about that sufficiency, e.g., metrics contained within the sufficiency, and error messages. As with Completeness tiles, users can locate incomplete attribute values (based on sufficiency settings) on the Details page by first toggling the "Display on side panel" toggle switch and then either hovering the cursor over the flag icon indicator in the side panel, or clicking on the specific attribute link. When you click on the specific attribute link, the page will auto-scroll to bring the attribute into focus on the screen.

Additionally, when the "Display on side panel" toggle is engaged, a blue circle icon displays to the right of the tab label for the tab containing attributes missing values that contribute to the item's Sufficiency. Inside the circle is a number indicating how many attributes related to the configured Sufficiency are missing required values. Completeness-related attributes may also contribute to the number in the blue circle if Completeness has been configured, has relevant attributes on the tab, and the "Display on side panel" toggle for Completeness has been activated.



To recalculate sufficiency scores once an attribute value has been updated, click the Recalculate scores link.


Sufficiency scores
eCommerce readiness 23%
Marketing Sufficiency 28%
Asset Quality 33%
Recalculate scores

Utilities

The utilities are located in the upper right-hand corner of the Instrument interface.

The utilities are comprised of five elements that enable users to quickly search, navigate, or configure Instrument settings.

Those elements are:

- Context selection
- Search bar
- Notification center
- User settings
- Configuration tool access

These elements are described in detail below.

Context Selection

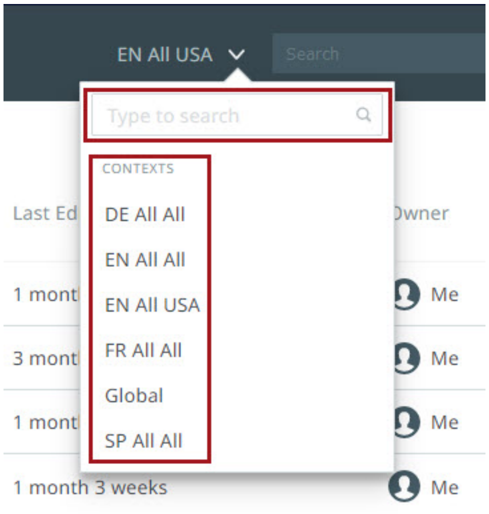
The context selector is located to the left of the search bar in the utilities.

The context selector is comprised of two elements, listed from left to right:

- the name of the context currently being viewed
- a dropdown arrow

The name of the context tells the user which context the user is currently viewing.

When the user clicks the dropdown arrow, a dropdown menu displays.



In this dropdown menu, users can search for their desired context from the search field, or manually select it from the contexts listed under "Contexts".

When the user starts to type the name of their desired context into the search field, the list of contexts below the search field are automatically filtered until only the contexts that align with the user's search remain.

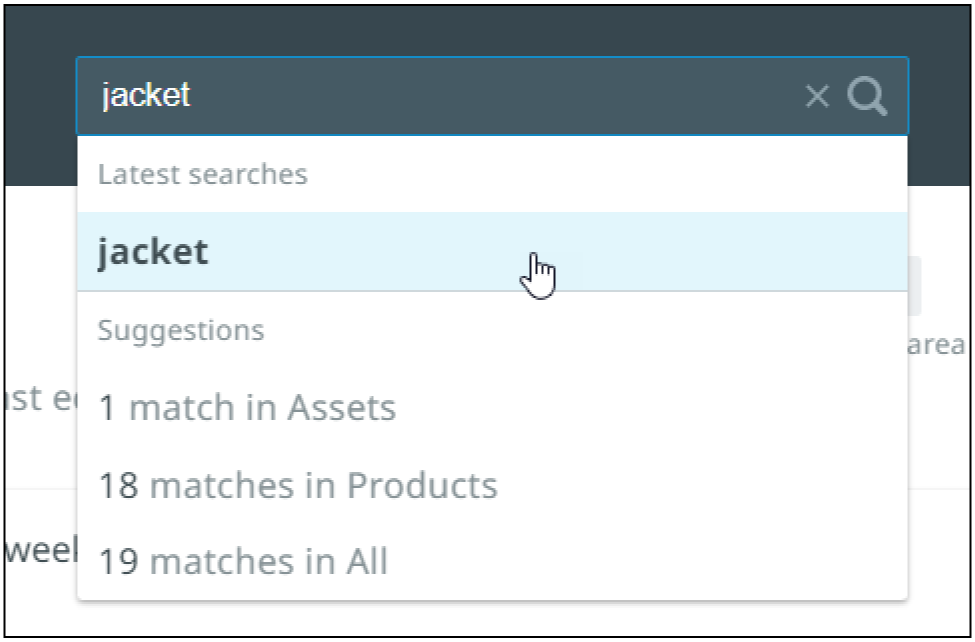
To select a new context to view in the Instrument interface, click the desired context from those listed in the dropdown menu. Following a refresh, Instrument opens in the new context.

Search Bar

Located in the utilities section next to the Notifications icon, the search bar can be used to locate products, classifications, and assets within Instrument.

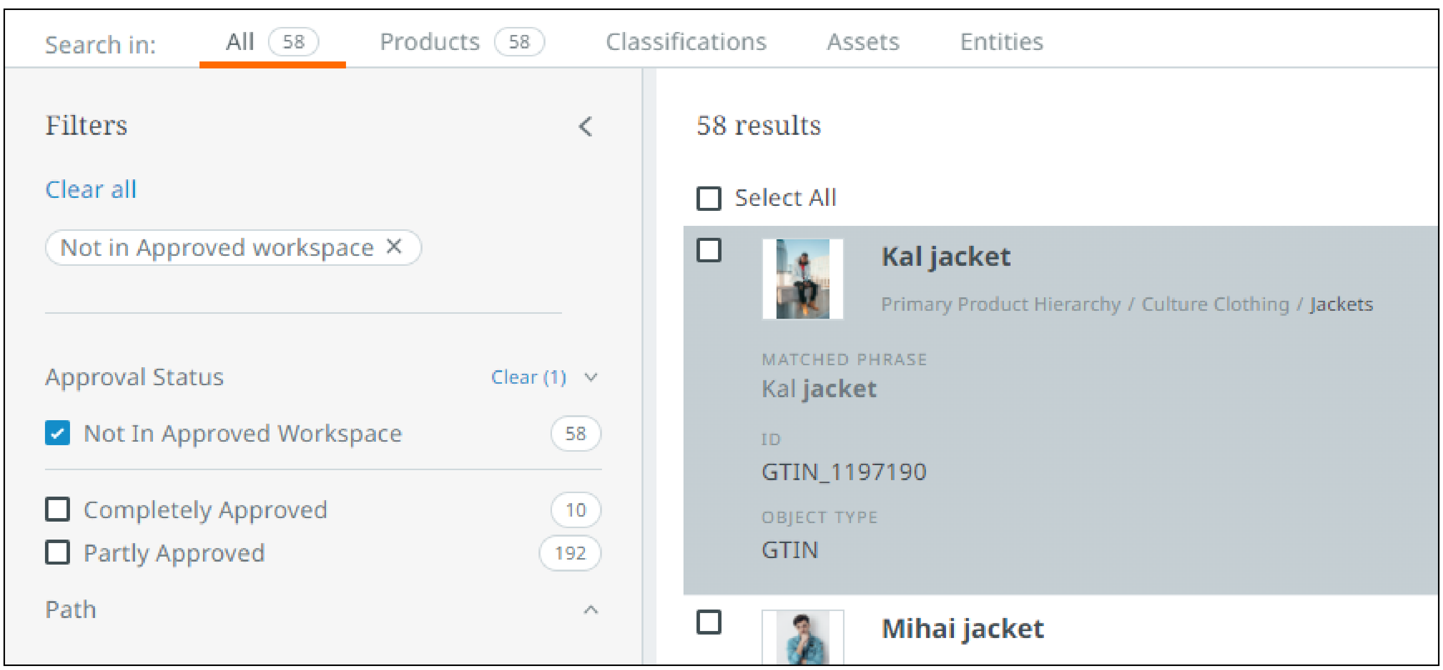
Important: Prerequisite—Verify or have a system administrator verify that a faceted search solution has been set up. Refer to the Elasticsearch Setup topic / section in the System Setup documentation.

To search for available data, enter the search terms in the search bar, and click the magnifying glass button, hit the "Enter" button, or make a selection from the dropdown. Or, if you prefer to navigate directly to the search screen, click the magnifying glass without typing in a search query.



Filtering Search Results

On the search screen, the column on the left contains a number of filters that can be used to narrow down search results to display only those results that are most relevant.



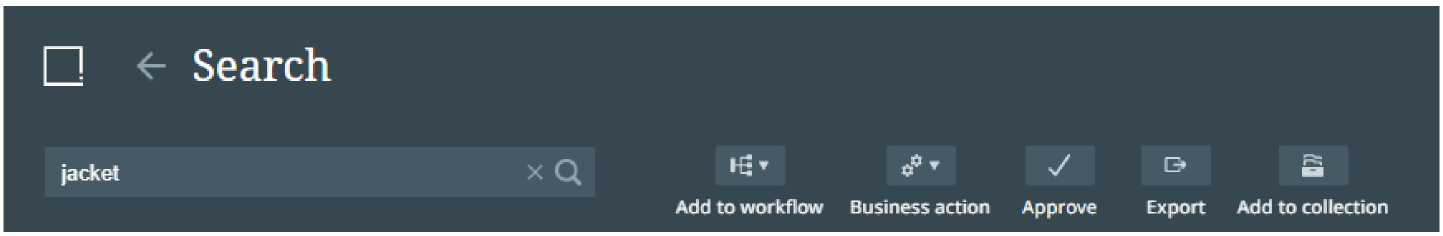
Click on any of the arrows to the right of the attributes in the left nav to display a list of attribute values (facets) available among the items in the list. Each attribute value will be accompanied by a checkbox and a number value that represents the number of items that have that value for the attribute. To filter your list of items to display only those items with the listed value, check the box beside the value. Multiple boxes can be checked to further refine your search.

This list of facets updates dynamically in order to provide you with the most relevant options based on the content of your search.

Search Results

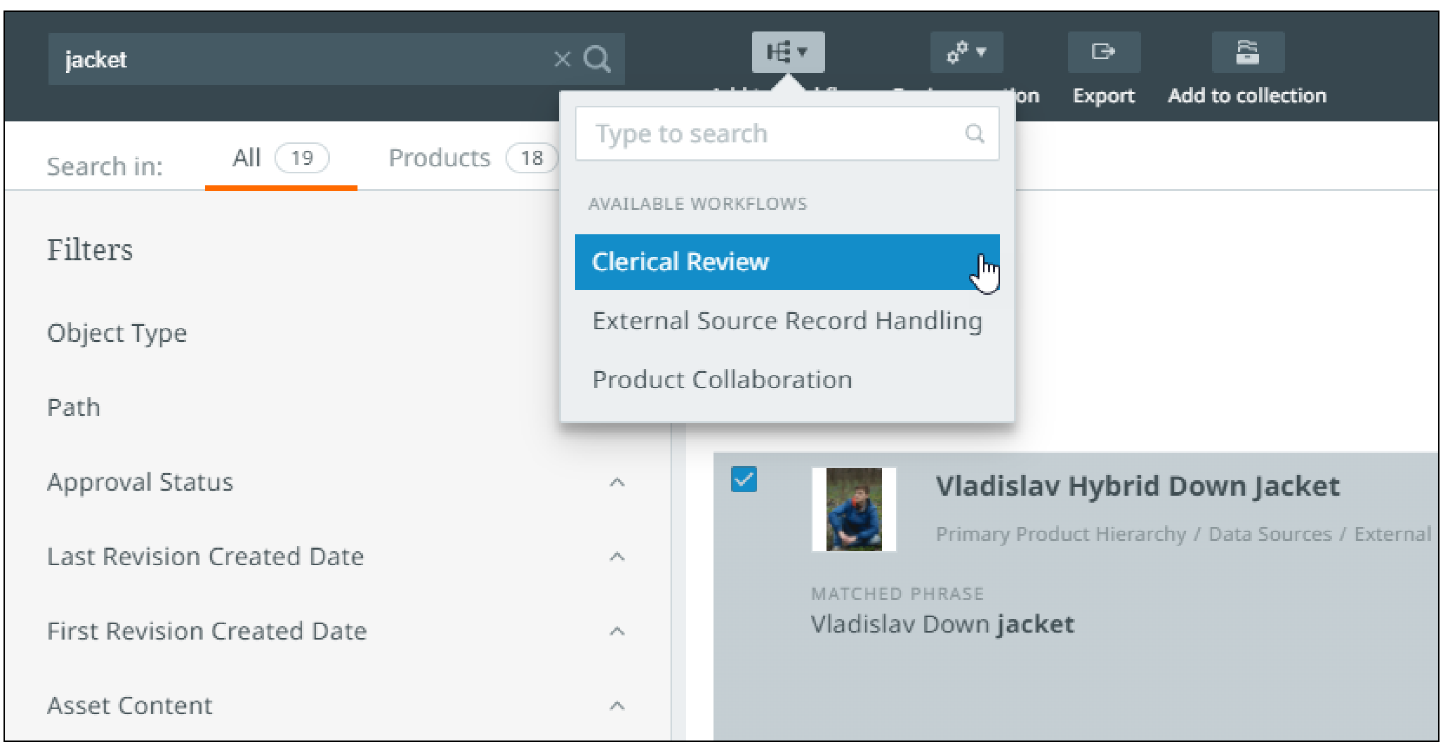
You can select one or more items from the search results, and take the following actions:

- add a selection to a workflow
- apply a business action to the selection
- approve selections
- export selections into an Excel spreadsheet
- add selection to a new or existing collection



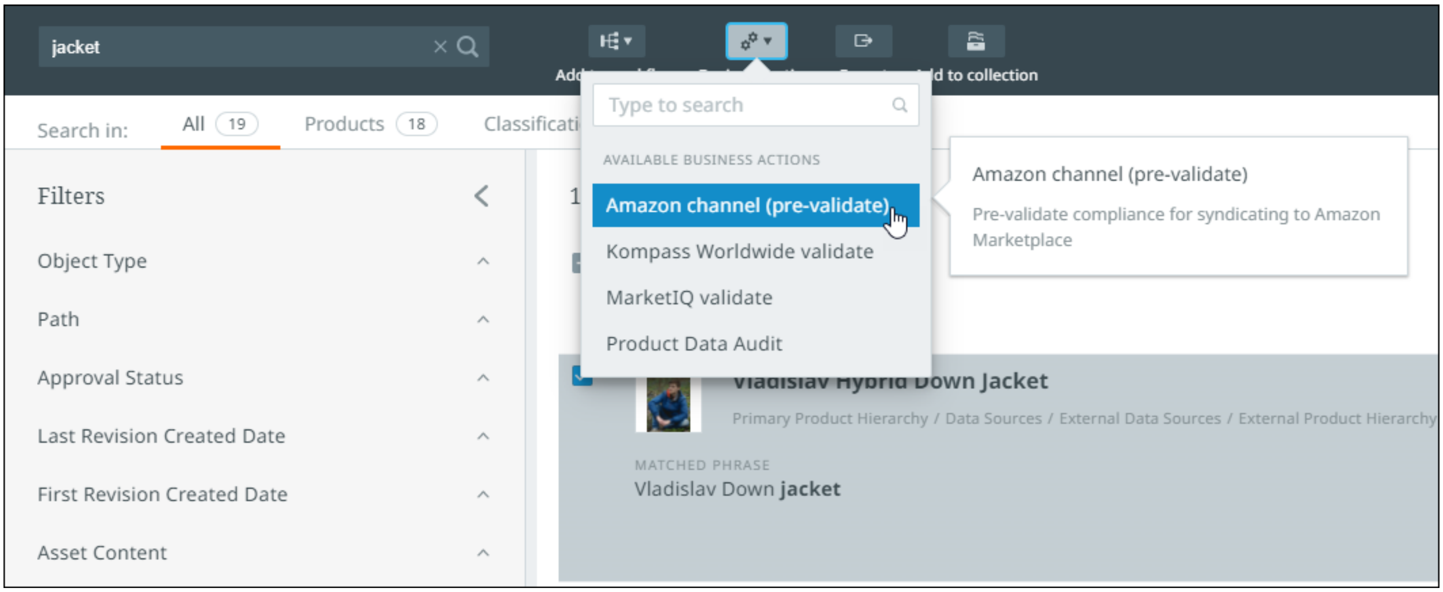
Adding Search Results to a Workflow

Once the selection has been made from the search results, click the "Add to Workflow" button at the top of the screen. A dropdown will display containing the names of all workflows configured on that system. When the desired workflow has been located from the drop-down, click it. The items in the selection are now added to the selected workflow.



Applying Business Actions to Search Results

With one or more items selected from the list of search results, users can apply a pre-configured business action to that selection. To do so, click the "Business Action" button at the top of the screen. The dropdown displays all applicable business actions configured on the system. Those business actions listed in black text can be applied to the selection, while those in gray cannot. Hover the cursor over each business action for additional information about that business action. When the desired business action has been located, click it. Subject to the business rule configuration and the selected items' suitability, the items in the selection will have the business action applied to them.



Exporting Search Results

Once users have made their selection from the search results, users can export the data for the items in the selection based on a pre-configured export configuration by clicking the "Export" button. If multiple export configurations have been configured, an "Export" dialog will display that allows users to select from all export configurations that user is privileged to use. With the desired export configuration selected, clicking the "Export" button, which also lists the number of items included in the export, initiates the export. The export file can be accessed by clicking the notifications button in the top right-hand corner of the interface.

Approving Objects in the Search Results

Once users have made their selection from the search results, users can approve the selected objects by clicking the "Approve" button. The status of the approval can be accessed by clicking the notifications button in the top right-hand corner of the interface.

Adding Search Results to a Collection

Once the selection has been made from the search results, users can click the "Add to Collection" button at the top of the screen (next to the search bar).

Users will then have the option to "Create a new collection" or add the selection to an existing collection, if available.

When creating a new collection, users can pick a work area and then input the desired name for the collection.

- Use the check mark to add the collection or the trash icon to delete the information you have entered.
- To add the selection to the collection, you will choose "Add to collection" at the bottom of the dialog.

If a collection or collections already exist, they will be listed in the dialog. Make a collection selection, and "Add to collection."

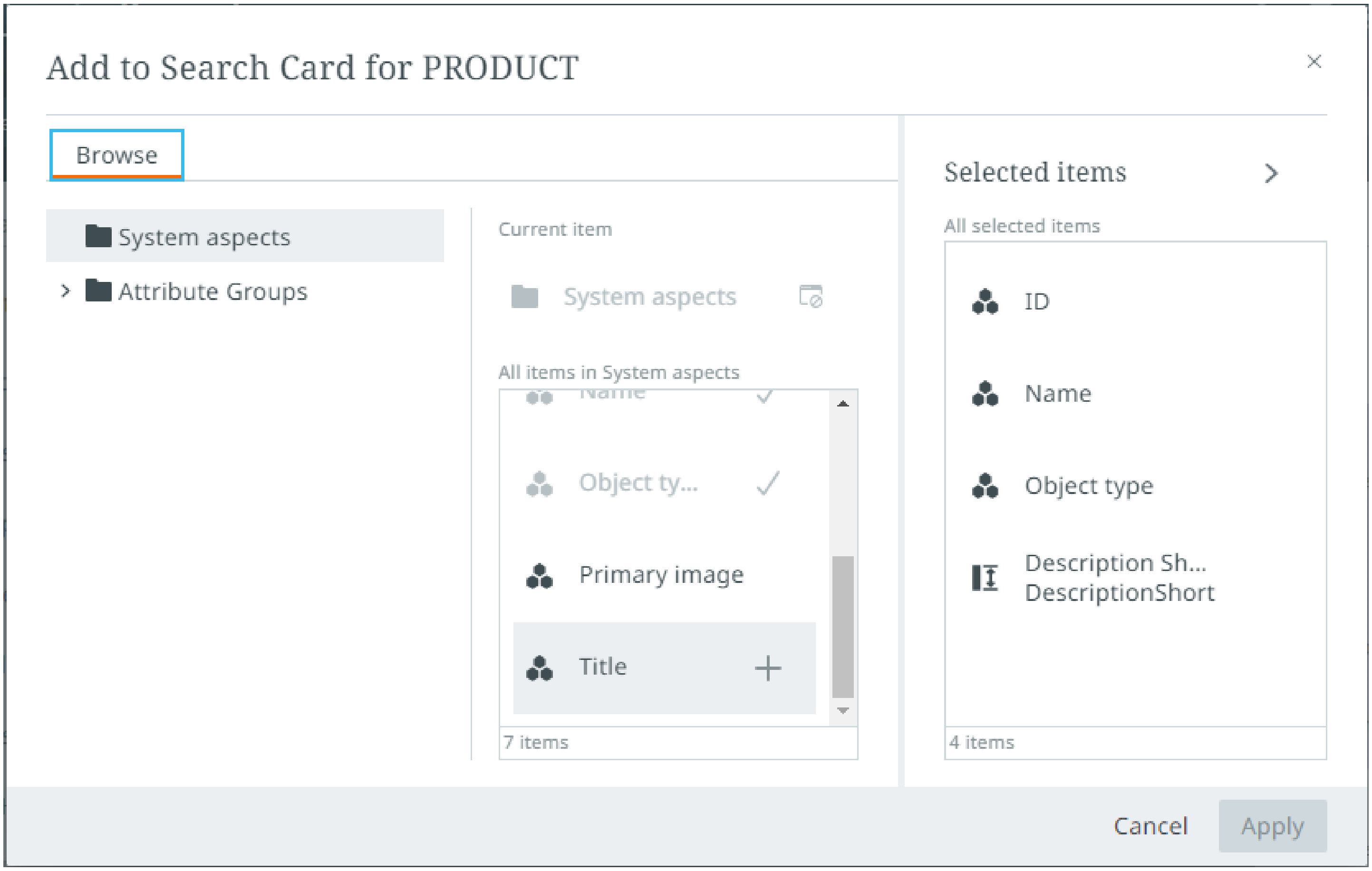
As items are added to a collection, the Notification center is updated and the notification gives you a link to the collection.

> **Note:** When a specific search term is entered in the search bar, returned values based on that search term will include a breadcrumb navigation that displays the category / product path. This information is especially helpful for users that want to view the categories associated with the search results and filter the results as needed. While this is not shown above, an example can be found in the Search bar.

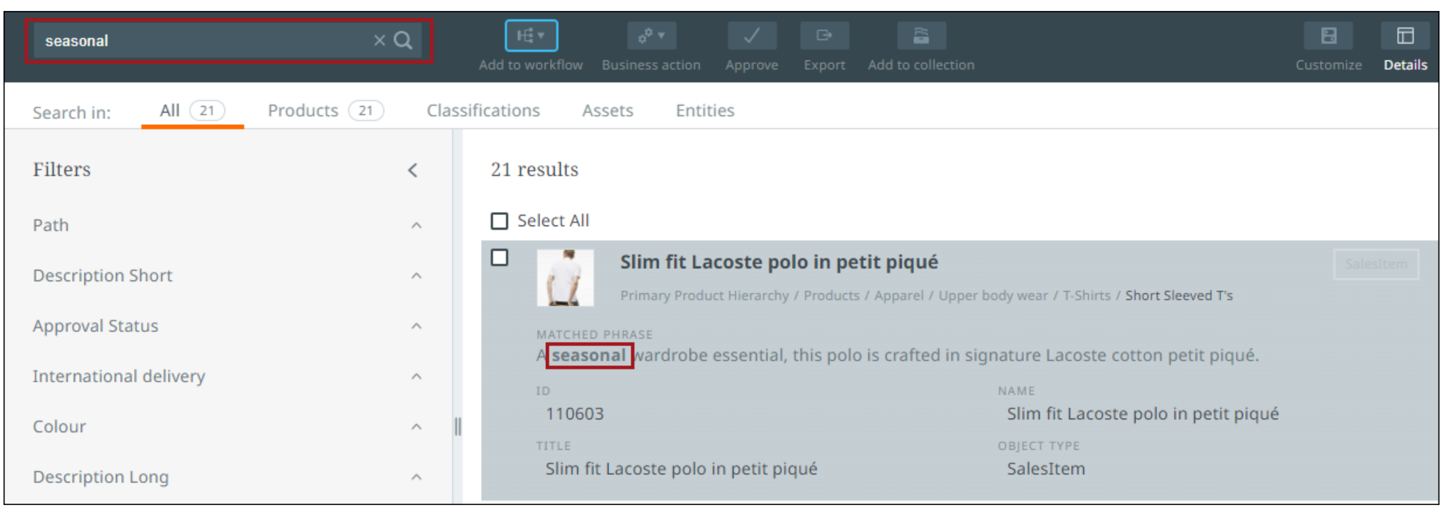
Search Results Product Card View

When searching for objects, you need to be able to identify them quickly when reviewing the results. The search cards which display the search results, provides you with enough information within a card view to identify the objects being returned while also allowing you to validate your search.

Search cards display up to four attributes per card. The attributes that are configured to show on the card view are the same attributes that will be displayed as columns if creating a new perspective with these results. These attributes can be changed by clicking the customize button via the toolbar and selecting the desired attributes from the "Add to Search Card" menu. Only the first 4 items listed will appear on the search card. Refer to the Item Picker topic for more information.



Any relevant matched phrases appear in bold on the search card.

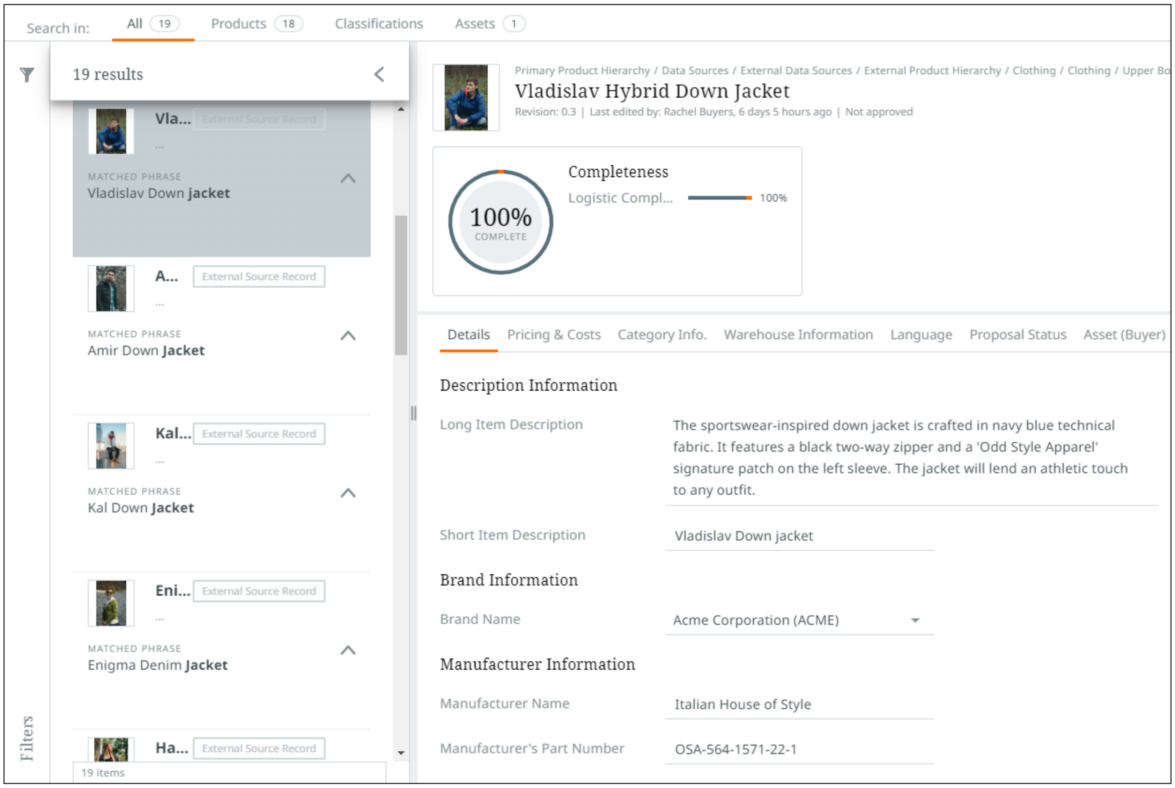


GraphQL queries have been created to retrieve search attribute configuration settings and to update attribute configuration settings. Administrators can get the information to run these queries from the Creating default collection perspective columns topic.

Details Panel

If you wish to view the details of a search result, select a card or click the details button via the toolbar to open up a details panel on the right-side of the screen. Information provided in this panel is identical to the details pane found via Tasks and Browse perspectives.

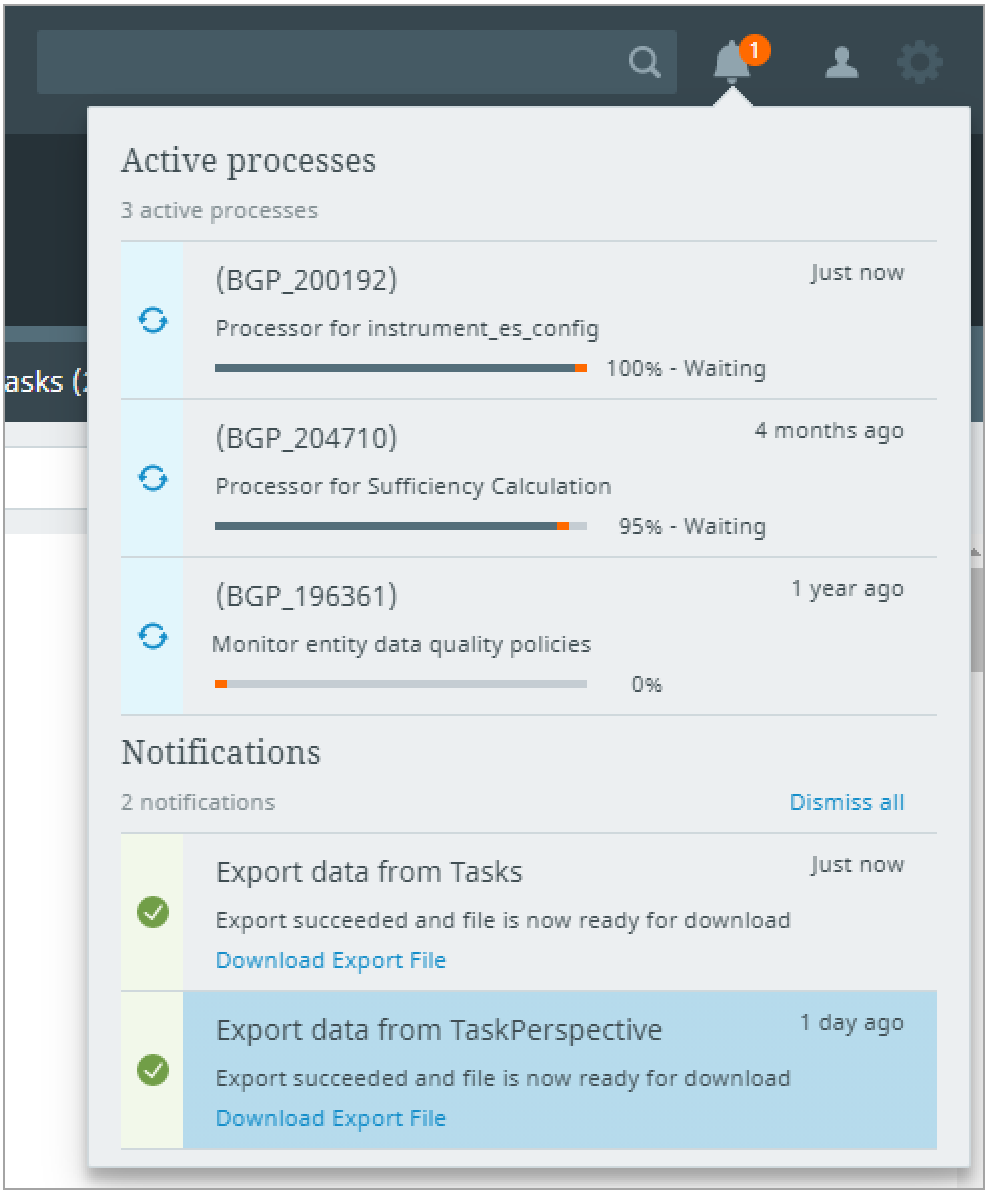
To return to the search results screen, click the details button in the toolbar.



Notification Center

The notification center, accessed by clicking the bell-shaped button in the utilities, is a centralized place for:

- Keeping visibility and status of your processes running in the background away from your current activities. This allows you to continue your work after initiating large operations.
- Receiving actionable notifications that provide messaging and navigation for you to complete the call to action.



If you have any active processes or notifications[1] that need your attention, they will be available upon opening the navigation panel. If working in the interface with the notification panel closed, you will receive pop-up notifications letting you know of any status changes or new notifications.

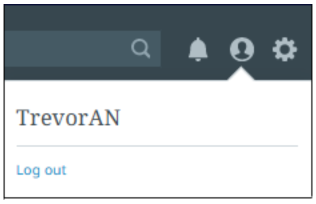
User Settings

The user settings button, located in the utilities, is represented by the silhouette of a person.

[1]displays up to 200 of the latest notifications

When clicked, a small dialog displays containing two elements:

- the name of the person currently logged into Instrument
- a "Log out" button



Clicking the user settings button allows users to quickly view the user name of the account currently logged in. This can be useful for admin users confirming access and display configurations for users.

To log out of the Instrument session, click "Log out".

Configuration Tool Access

The configuration tool can be accessed by clicking the gear button found at the far-right in the utilities. This button only displays for users with admin-level privileges.

When clicked, the configuration tool screen opens, which allows admin users to configure various parts of the Instrument interface.

For a full description of the configuration tool and how to use it, refer to the Configuration tool topics in the Administration documentation.

Data Containers

A data container allows you to represent and structure complex entity or product data through the use of composite attribute objects. For more on how to setup data containers and how they work, refer to the Data Containers section of the System Setup documentation.

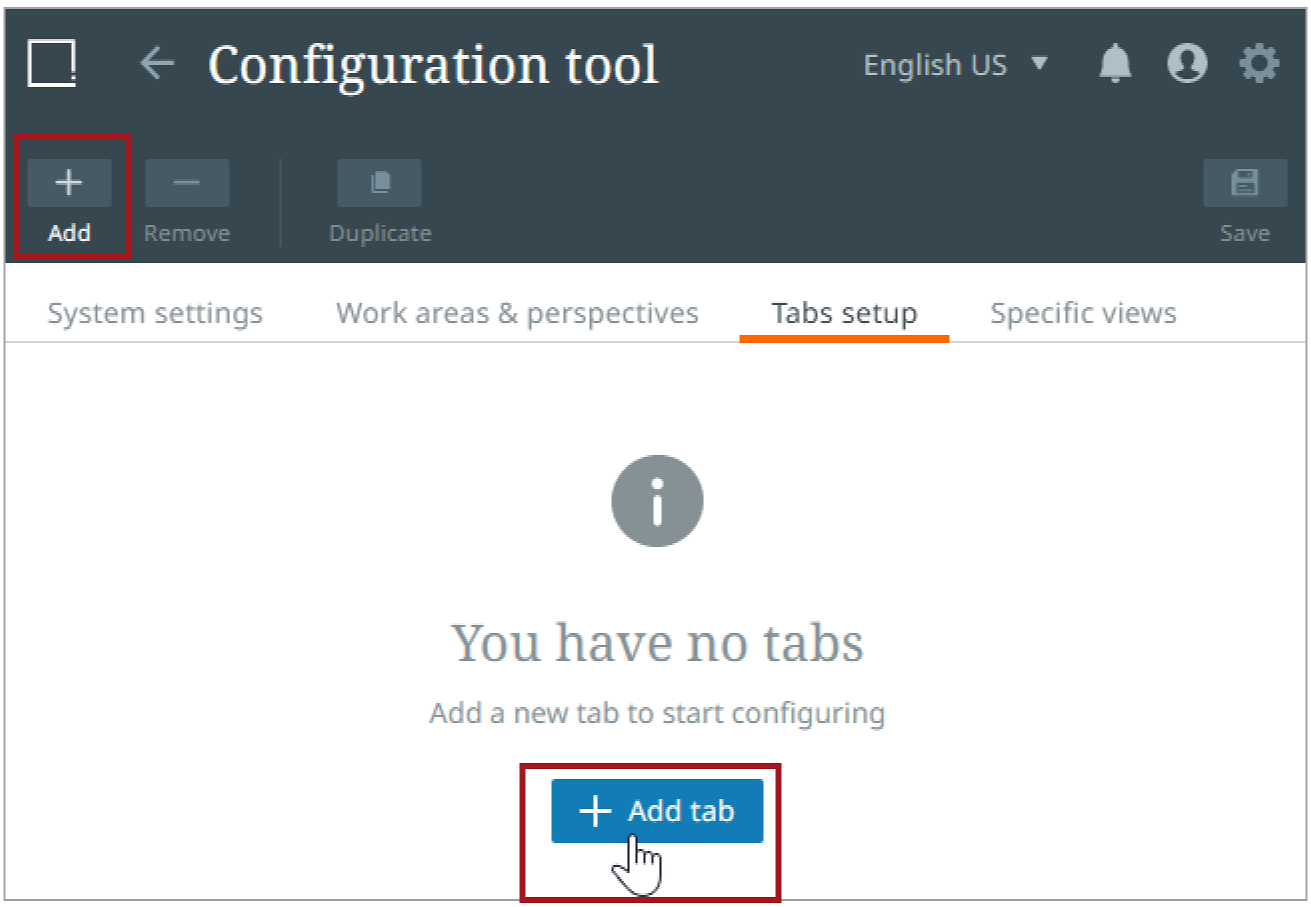
Note: For data containers to display in Instrument, they must first be created in the workbench.

Adding Data Containers

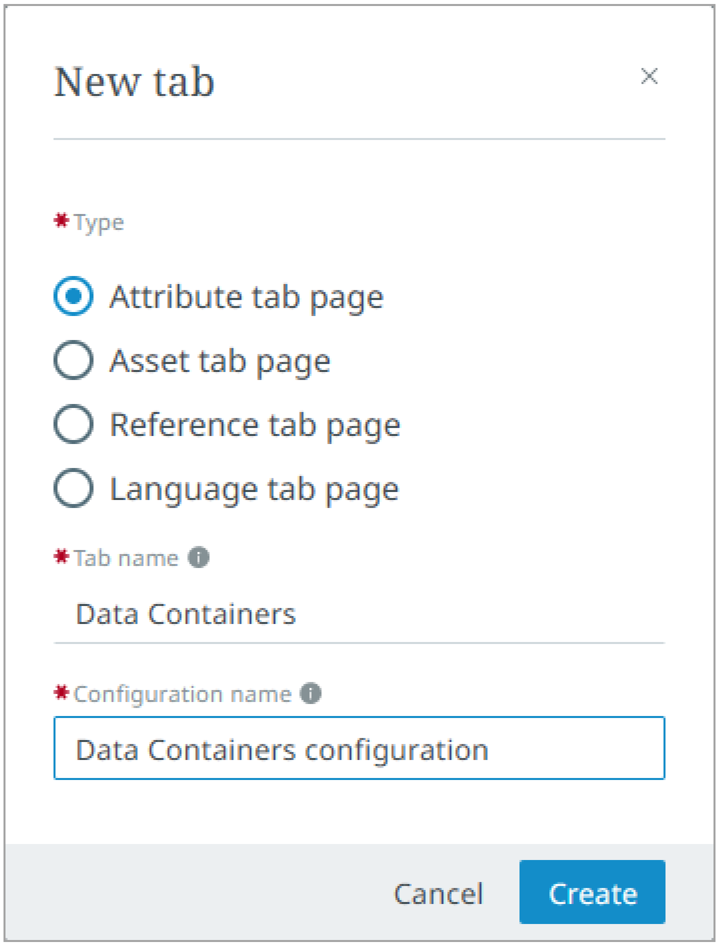
Data containers can be added to a details view. To add a data container to the details view:

1. Click on the Configuration tool in the upper right-hand corner.

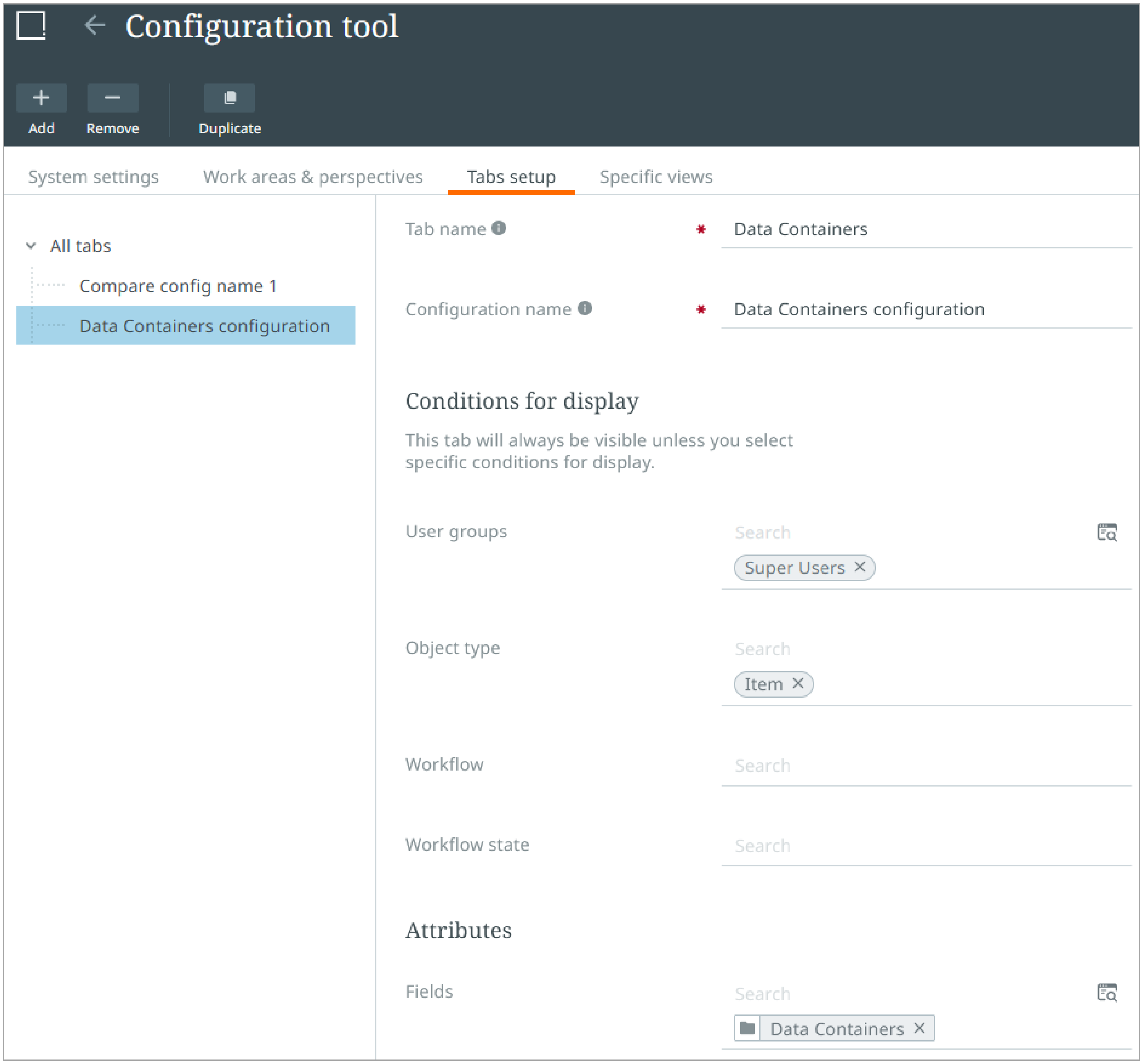
2. Select "Tabs setup," and click "Add" or "Add tab" to add a tab page.



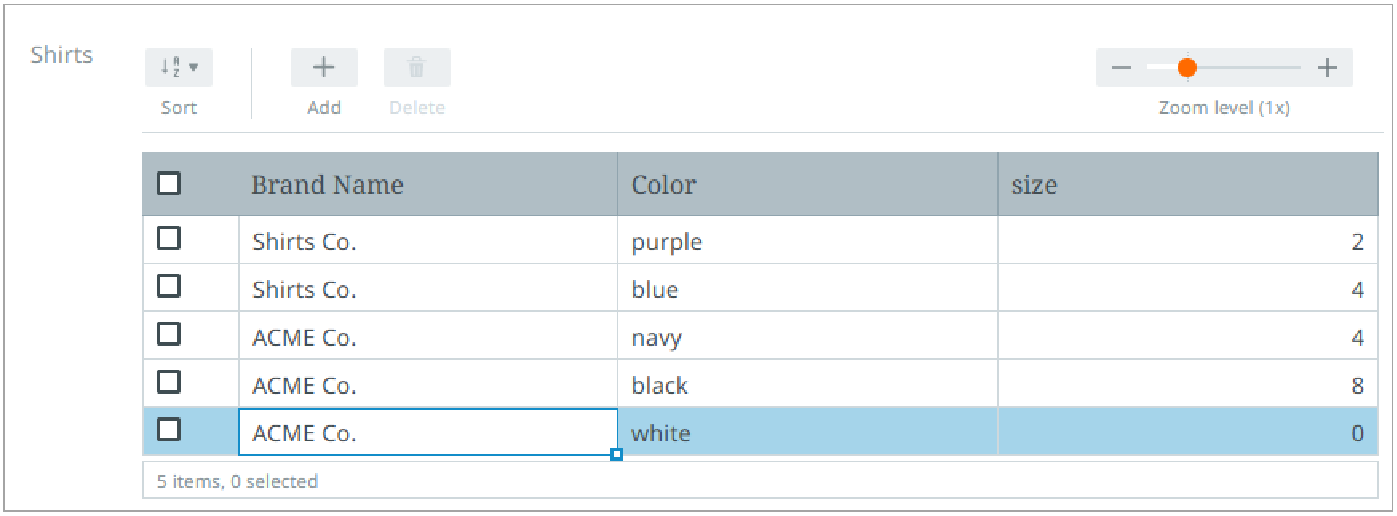
3. Select "Attribute tab page," and fill out the Tab name and Configuration name fields. Click Create.



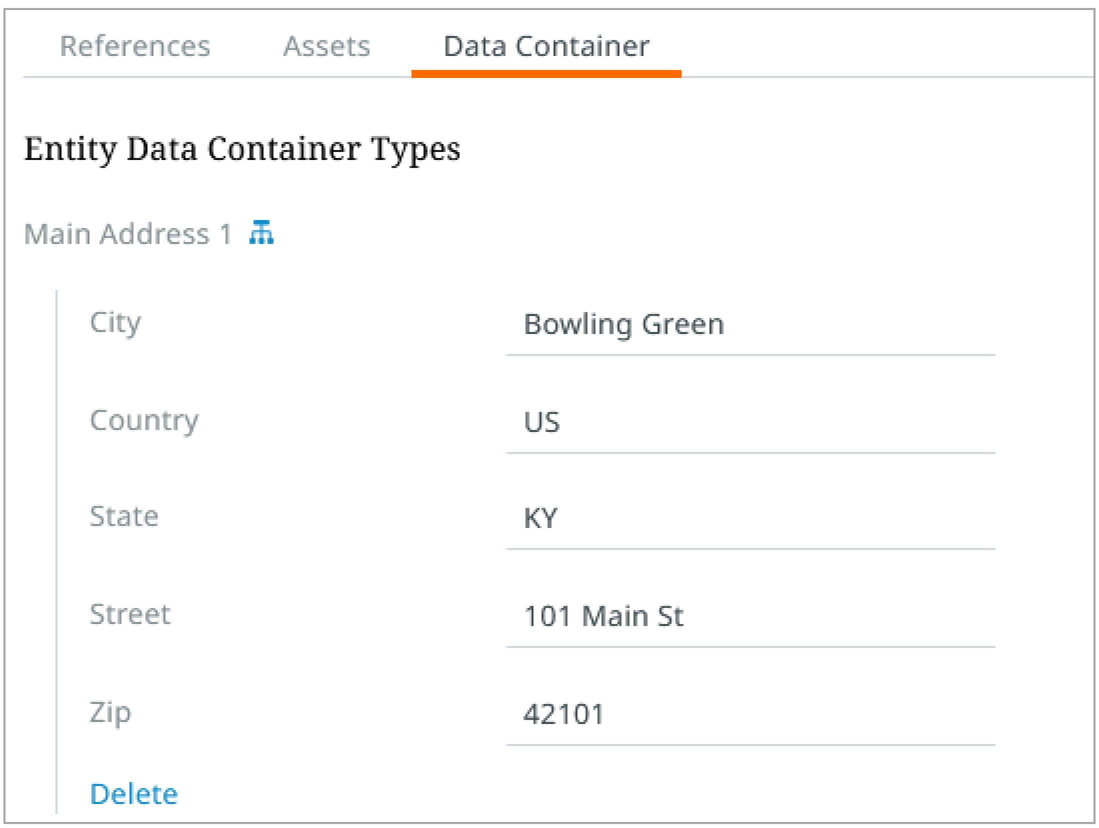
4. On the Attribute tab page just created, fill out any needed information. For more on the Tabs setup, refer to the Configuration tool tabs setup topic. Specifically for data containers, identify the Object type(s), and in the Attribute section in the Fields parameter, add the attribute folder(s) that contain the desired data container attributes. Click Save when finished.



5. Navigate back to the details view, and click on the tab you just created. The data container displays the attributes and its data.

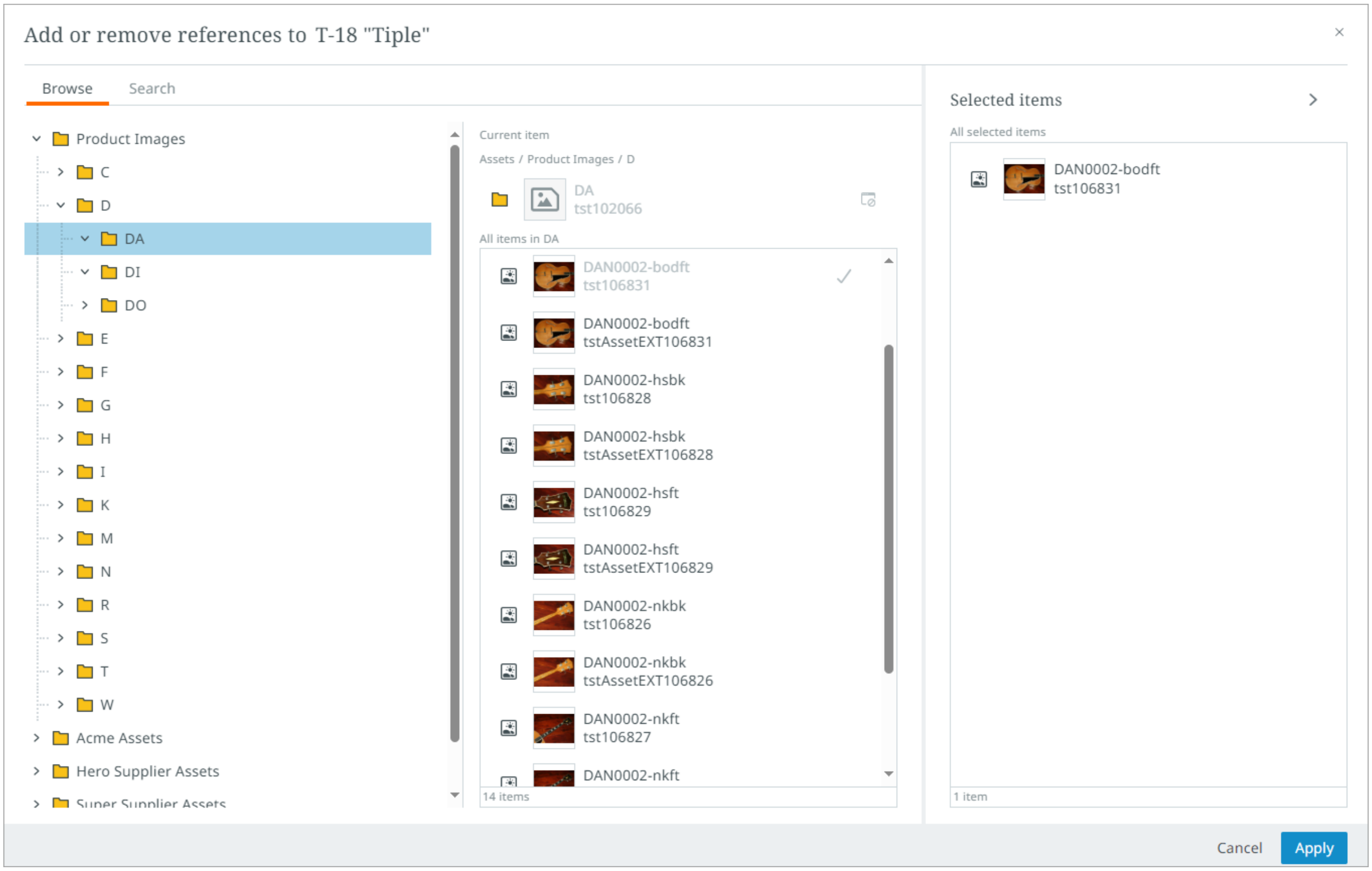


For single data containers, tables appear vertical for easier viewing. If the table is inherited, the inherited icon will display next to the data container name. In the example below, the table is an inherited single data container.



Item Picker

The item picker component allows users to browse or search through the available records to make selections.



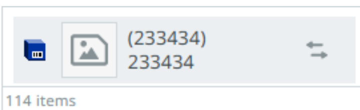
The item picker displays when users add asset, product, classification, or product-to-classification references. The item picker is also used to customize views.

The item picker opens by default on its "Browse" tab. In the "Browse" tab, users can navigate through system objects via an expandable and collapsible hierarchy called the navigation tree. The reference target object type determines what options are listed in the hierarchy. The path of the selected item is displayed in the middle panel.

In the "Search" tab, available in the item picker only when adding a reference to an item, users enter the desired item's name into the search bar to search for folders with items contained inside. By entering three characters into the search bar, the system presents results that align with the entered query, if present. The typeahead results will display beneath the search field, and for each result, that item's object type icon, thumbnail, name, and ID will display. For each item in the typeahead results that the user wants to reference, they must click the "+" symbol that displays at the far right of the item's list-row.

When added, the selected item's plus sign ("+") is replaced with a checkmark in the list of typeahead results. It also displays in the "Selected items" column.

If the user is, for instance, adding a reference for a single-value reference type, and an object has already been referenced and is displaying in the "Selected items" column, the objects showing in the center column will display not with a plus sign ("+") but a replace icon, as shown in the screenshot below:



Note: The "Search" tab is only available in the item picker when adding a reference to an item. It is not currently available for other use cases.

The visual elements that comprise each tab of the item picker is listed and described below.

Browse

The "Browse" tab of the item picker dialog is comprised of three vertical panels:

Tree Navigator - In this panel, the relevant hierarchy is displayed. Users navigate through the hierarchy to locate and select the desired object. The folders and objects selected from the hierarchy display in the "Selected items" panel.

Selection List - In this panel, users can view which objects are contained in folders selected in the tree navigator panel. Objects in gray text cannot be selected. Objects in black text can be selected. To select an object, hover your cursor over that object. A "+" symbol displays to the far right of the listed object. When you click the "+" button, the object is moved to the third panel.

Selected Items - The "Selected items" panel shows all selected objects relevant to the object being worked.

Search

The "Search" tab of the item picker dialog is comprised of two vertical panels:

Search and select items - At the top of this panel is the search bar. Users type their search query into this field and the typeahead results display beneath the search bar.

Selected Items - The "Selected items" panel shows all selected objects relevant to the object being worked.

To save and apply the changes made on either tab of the item picker, click the "Apply" button. To disregard any changes made in the item picker, click the "Cancel" button.

For more information on how the item picker works in the "Assets" tab, review the "Assets Tab" section of the Tabs topic.

Administration

Administration for Instrument is not required within Instrument itself, the functionality of Instrument does rely on your data model and additional configuration from within the workbench.

This section goes over administration specific to Instrument.

Prerequisites

- Be on the most recent STEP version. Going forward, update to the latest version when available. Instrument updates will not be backported.
- Verify that you have set up (integrated and configured) a faceted search solution to use the search functionality. Refer to the Elasticsearch Setup section of the System Setup documentation.
- Verify that your system has In-Memory. Refer to the In-Memory Database Component for STEP section of the Resource Materials online help documentation.
- Verify that you have a classification folder set up to allow users to make a selection for their work area image. The default ID for the classification folder is ID = IllustrationRoot, but can be changed based on user requirements via a GraphQL mutation. Refer to the Setting default asset upload classification topic for instructions. If the user encounters an error (i.e., "Error with asset upload configuration"), check to ensure the default or configured classification folder exists and users have privileges required to access the classification folder.
- Verify that you have set up business actions and designated a specific setup group for Instrument users to access and use. By default, no business actions are shown without this setup. Refer to Setting business action availability for instructions.

Centralized Configuration

Centralized configuration is a centralized storage model for configurations. The centralized configuration concept is intended to make Instrument usage much easier for users and admins. The configurations are stored in System Setup nodes that live below Setup Groups within System Setup. The system relies on the presence and the content of these configurations, and it will change or remove the configurations when necessary.

Additionally, there is a "Centralized Configuration Attributes" attribute group that works with these configurations.

Important: Do not make any manual changes to any of these "Centralized Configurations" nodes / groups.

Instrument will no longer function if you make changes.

Administrators should review the Configuration Management - Export topic to understand centralized configuration solution details and how to export configurations to import into other systems for a Development, Testing, Acceptance, and Production (DTAP) approach to testing and deployment.

Using GraphQL, administrators can make a few changes that will be stored in the centralized configurations storage model as mentioned above. Examples of this are the Creating default collection perspective columns and Setting business action availability topics.

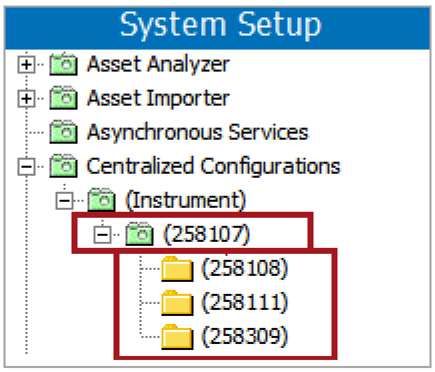
Configuration Management - Export

In this topic, you will find information regarding the options you need to select in the workbench Export Manager to export the needed configurations. Exporting the configurations allows you to transfer the configurations using STEPXML to support a development, testing, acceptance, and production (DTAP) approach to testing and deployment.

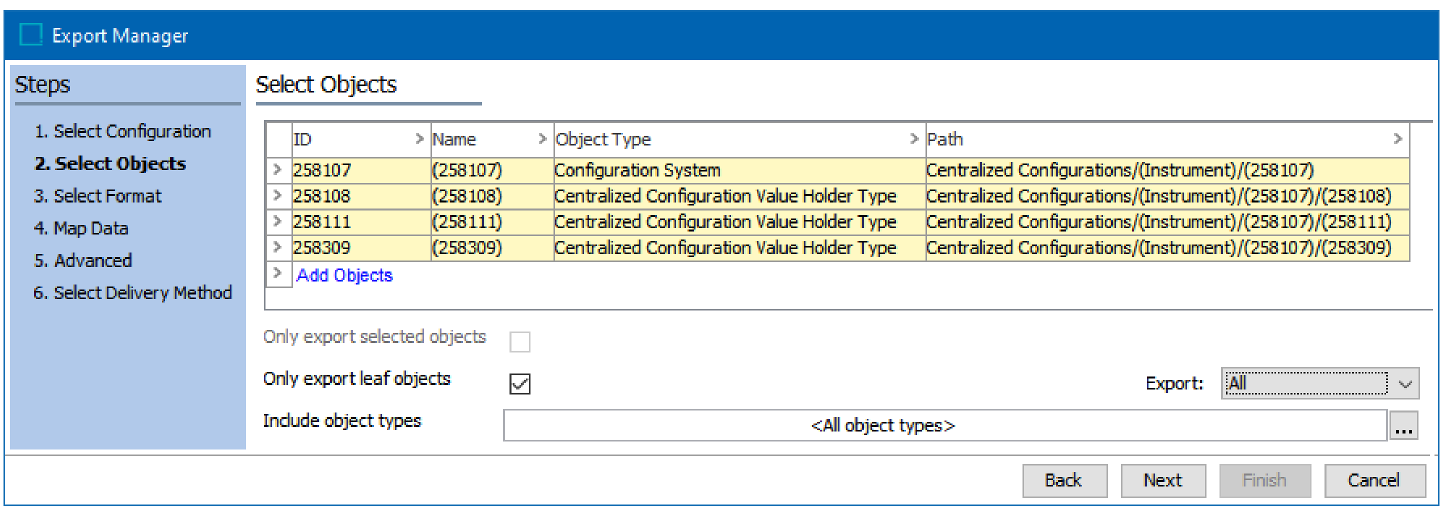
Configurations can be stored on the user-level, user group-level, or global- (default settings) level.

- If no configurations are stored on the user level, then the system will look for the user group level.
- If no configurations are stored on the user group level, then the system will look at the global level (default settings).

In step 2 (Select Objects) of the Export Manager Wizard, select the "Configuration System"-level setup group tree node in the setup group hierarchy holding centralized configurations. Also, select all setup entities below the "Configuration System" level.



In the screen shot below, the "Configuration System"-level setup group and the three setup entities in the setup group are selected.



In step 3 (Select Format), select "Advanced STEPXML" and use the template:

```
<?xml version='1.0'?>
<STEP-ProductInformation DefinitionsAsComments="true">
    <SetupGroups ExportSize="Selected"/>
    <SetupEntities ExportSize="Selected"/>
    <UserGroupList ExportSize="Selected"/>
    <UserList ExportSize="Selected"/>
</STEP-ProductInformation>
```

This would generate a STEPXML file like the following:

```

                        <MadCap:concept term="Instrument"
xmlns:MadCap="http://www.madcapsoftware.com/Schemas/MadCap.xsd" /><STEP-ProductInformation
ExportTime="2022-01-12
22:10:14" ExportContext="Context1" ContextID="Context1" WorkspaceID="Main" UseContextLocale="false">

  <SetupGroups>
    <SetupGroup ID="CentralizedConfigurations" UserTypeID="CentralizedConfigurations">
      <Name>Centralized Configurations</Name>
      <SetupGroup ID="Instrument" UserTypeID="ConfigurationType">
        <SetupGroup ID="258107" UserTypeID="ConfigurationSystem" Selected="true" Referenced="true">
          <MetaData>
            <Value AttributeID="ConfigurationSystem">Default System For Value Holder</Value>
          </MetaData>
        </SetupGroup>
      </SetupGroup>
    </SetupGroup>
  </SetupGroups>

  <SetupEntities>
    <SetupEntity
ID="258309" UserTypeID="CentralizedConfigurationValueHolderType" Selected="true" Referenced="true">
<!-- Definition:
Configuration={
```

```
  "ContextConfiguration" : "<?xml version=\"1.0\" encoding=\"UTF-8\"?>\n<plugin id=\"ContextConfiguration\">\n  <simple id=\"Context\">step://context?id=Context0</simple>\n</plugin>\n"
} -->
      <SetupGroupLink SetupGroupID="258107"/>
      <Configuration>H4sIAAAAAAAAAG2NQQrCMBBF9z3FMHtN3UmJzSLgCXSXjbQxDKST0KRSEO9uSlwouBv+e3++Dnwnt8y3TIFPzwYAdeBs16y/CUIHKNU6eXjYOW2uwcO+NQiWhzASuxJcL+fd0aDqDcvoF0cMNJb830eDxQKQiabo7Y9XUMo2dkIMNVCFflgrRW1sG6KOlBObl0zRU+7fRL5xGtEAAAA=</Configuration>
    </SetupEntity>
    <SetupEntity ID="258111" UserTypeID="CentralizedConfigurationValueHolderType" Selected="true" Referenced="true">
<!-- Definition:
Configuration={
  "ContextConfiguration" : "<?xml version=\"1.0\" encoding=\"UTF-8\"?>\n<plugin id=\"ContextConfiguration\">\n  <simple id=\"Context\">step://context?id=Context0</simple>\n</plugin>\n"
} -->
      <SetupGroupLink SetupGroupID="258107"/>
      <Configuration>H4sIAAAAAAAAAG2NQQrCMBBF9z3FMHtN3UmJzSLgCXSXjbQxDKST0KRSEO9uSlwouBv+e3++Dnwnt8y3TIFPzwYAdeBs16y/CUIHKNU6eXjYOW2uwcO+NQiWhzASuxJcL+fd0aDqDcvoF0cMNJb830eDxQKQiabo7Y9XUMo2dkIMNVCFflgrRW1sG6KOlBObl0zRU+7fRL5xGtEAAAA=</Configuration>
    </SetupEntity>
    <SetupEntity ID="258108" UserTypeID="CentralizedConfigurationValueHolderType" Selected="true" Referenced="true">
<!-- Definition:
Configuration={
  "ContextConfiguration" : "<?xml version=\"1.0\" encoding=\"UTF-8\"?>\n<plugin id=\"ContextConfiguration\">\n  <simple id=\"Context\">step://context?id=Context0</simple>\n</plugin>\n"
} -->
      <SetupGroupLink SetupGroupID="258107"/>
      <Configuration>H4sIAAAAAAAAAG2NQQrCMBBF9z3FMHtN3UmJzSLgCXSXjbQxDKST0KRSEO9uSlwouBv+e3++Dnwnt8y3TIFPzwYAdeBs16y/CUIHKNU6eXjYOW2uwcO+NQiWhzASuxJcL+fd0aDqDcvoF0cMNJb830eDxQKQiabo7Y9XUMo2dkIMNVCFflgrRW1sG6KOlBObl0zRU+7f
```

```
RL5xGtEAAAA=</Configuration>
    </SetupEntity>
  </SetupEntities>
</STEP-ProductInformation>
```


The file is ready to import to another system.

Configuration Management - Import

In this topic, you will find information regarding configuration management in Instrument and how an Instrument UI configuration from a source system can be imported into an Instrument UI configuration on a target system.

For information related to readying your Instrument UI configuration for import, review the Configuration Management - Export topic, also found in the Administration documentation.

Importing an Instrument UI configuration is accomplished via the Import Manager.

The ability to manage Instrument UI configurations supports an array of use cases. What follows are the most common use cases where an Instrument configuration on a pre-production system is imported into a production system:

Configuration Replacement : Replacement rules can be added in the import STEP XML file to fully replace an existing Instrument configuration with an imported configuration. One use case where this option would be useful is where the admin knows the import configuration should replace all user groups and default configurations. The admin can use replacement rules to specify replacement of all default configurations and user group-owned configurations. This method might be optimal in an instance where a configuration is moved to a live system from a test system from which all the test system configurations are correct and up to date.

When admin users replace an existing Instrument configuration with a new one:

- existing elements in the target system are updated with the changes made in the source system
- elements deleted in the source system will also be deleted in the target system
- elements not in the source system will be deleted from the target system

To apply replacement rules, include any of the three rules shown below to the import STEP XML file:

```
<ReplacementRules>
  <SetupEntities>
    <ReplaceCentralizedConfigurationInstances OwnedBy="UserGroup"/>
    <ReplaceCentralizedConfigurationInstances OwnedBy="Default"/>
    <ReplaceCentralizedConfigurationInstances OwnedBy="User"/>
  </SetupEntities>
</ReplacementRules>
```

Each of the rules accomplishes a specific replacement task:

1. <ReplaceCentralizedConfigurationInstances OwnedBy="UserGroup"?> -- This rule removes all user group configurations, but leaves all other configurations untouched.
2. <ReplaceCentralizedConfigurationInstances OwnedBy="Default"?> -- This rule removes all default configurations, but leaves all other configurations untouched.
3. <ReplaceCentralizedConfigurationInstances OwnedBy="User"?> -- This rule removes all user configurations, but leaves all other configurations untouched.

In the example use case described above, the admin would apply rules 1 and 2 to the import STEP XML file to replace all configuration but those owned by the users.

Full replacement of an Instrument configuration by an imported configuration will require that all three replacement rules are added to the import configuration file.

Merging configurations: Imports an Instrument configuration from one environment into an Instrument configuration in another environment, retaining important elements of both. To merge configurations, no replacement rules should be applied. For instance, if the admin wants to add Accelerator for Retail to a system in which Accelerator has never been installed, the admin will not use replacement rules as the admin wants the new Accelerator configurations to be added to the existing configurations.

Additionally, if the admin wants to update their existing Accelerator configurations on a system with a new Accelerator package, the admin will also not use replacement rules as they want the new configurations to be merged with existing configurations and, where the configurations match, the new configurations must overwrite the old.

Instrument configuration imports fail in cases where the import cannot create a new setup entity or update an existing setup entity. In all other cases, the import will complete. The import may complete with errors if the imported configuration from the source system refers to any of the following elements absent from the target system:

- workflows
- workflow states in an existing workflow, or workflow states in a non-existing workflow
- perspectives included in a non-existing work area
- user groups or users
- object types

In all cases, the ID of the missing object will be reported in the import's execution report.

When importing an Instrument UI configuration from a source system to a target system, it is not possible to import only a selected configuration from the source system to the target system. All work areas, perspectives, and tab configurations configured on the source system will be imported to the target system.

All work areas in the target Instrument UI configuration source system are retained upon import. Because the import process does not allow for admin users to select which work areas to import in the import configuration, all work areas will be imported and will display in the target Instrument UI, (subject to the users granted the appropriate privileges required to view those work areas).

Note: Admin users cannot delete the setup entities that store the centralized configurations.

Additional Considerations for Administrators

For admins importing an Instrument UI from a source system into a target system, there are aspects of the import that are important to be aware of:

- Because work areas on a target Instrument UI are not overwritten by those on the source system's Instrument UI during import, all work areas deemed unnecessary must be deleted manually by the admin. Deletion of work areas must be done using the configuration tool in Instrument. For more information on managing work areas, refer to the Work areas topic.
- Work areas, perspectives, and tabs configured on the target UI that have the same ID as those found on the source UI will be overwritten upon import.

- If a specific view has been configured for an object type on the target Instrument UI, and a specific view has been configured for the same object type on the source Instrument UI (or vice versa), the two views will be in conflict upon import and will display as an error in the import execution report. Both views will be present in the post-import UI; the admin user will be responsible for reviewing the two views and deleting the unnecessary view.

Configuring the Compare Tab

To configure a "Compare" tab for use in a details view, a GraphQL mutation must be drafted. By setting one or more "ConditionTypes" on the mutation, admins can determine under what circumstances a "Compare" tab will display.

To run this mutation from your local STEP environment, follow the steps described below:

1. Open the local GraphiQL editor by navigating to your local STEP server using this URL template: https://[servername]/graphqlv2
2. Enter your login credentials (creating this tab requires admin access)

Written below is an example of the "Compare" tab mutation, followed by a description of the relevant elements that will need to be amended from the example to make the "Compare" tab useful for each instance. Copy from this example mutation (using the "Copy" link in the upper-right hand corner of the example) and paste it into GraphQL:

```
1  mutation writecfg {
2    updatePerspectiveView(input:
3      {propertyName: "CompareRecords",
4      configurationName: "Compare Records - Configuration",
5      tabType: "COMPARE",
6      viewName: "Compare Records",
7      groupId: "PMDM.UG.BuyerGroup",
8      conditions: [
9        {conditionType: "ObjectType", objectTypeIDParameter: "PMDM.PRD.InternalSourceRecord"},
10       {conditionType: "Task", workflowIDParameter: "PMDM.WF.InternalSourceRecordCreation",
   stateIDParameter: "Buyer_Review"},
11       {conditionType: "Workflow", workflowIDParameter: "PMDM.WF.InternalSourceRecordCreation"}
12     ],
13     viewContents: [
14       {itemID: "CharacteristicsAttributes", itemType: "attributeGroup"}
15     ]
16     }
17   ) {success}
18 }
```

- **Tab ID**: On line three (3) in the example (propertyName), the "Tab ID" refers to the unique ID for the specific tab referenced.
- **Configuration Name**: On line four (4) in the example (configurationName), the "Configuration Name" is the label given to the tab configuration as it displays in the "All tabs" and "Available tabs" sections of the "Tabs setup" tab in the Configuration tool. This allows admin users to visually distinguish between similar tabs in the configuration tool. It is not the "name" of the tab, nor the "ID"; it is only the name of the tab configuration.

- **Tab Type**: On line five (5) in the example is "Tab type" (tabType). The "Tab type" refers to the type of the configured tab, and cannot be customized. The "Compare type" for all "Compare" tabs is "COMPARE".
- **View Name**: On line six (6) in the example is "View Name" (viewName). The value added here determines what label displays on the tab itself in the details view wherever the tab is configured to display.
- **Group ID**: On line seven (7) in the example is "Group ID" (groupID). The value(s) added define the user groups for which this tab will display. For instance, if the user group "Data Stewards" is listed but the user group "Marketers" is not, the configured tab where all conditions are met will display for users in the group "Data Stewards" , but not for users in the "Marketers" user group.
- **Conditions**: On line eight (8) in the example is "Conditions" (conditions). In this section of the mutation, admins can list the conditions under which the configured tab will display. Adding conditions here is optional: if no conditions are defined, the tab will be shown on all object types in all contexts on both the Browse and Tasks perspectives. For example, admins can stipulate that a user must be viewing a product of a specific object type, in a specific workflow, and / or in a specific workflow state. If all requirements are met and the user is in a configured user group, the tab will display. If any of the added conditions are not met, the tab will not display.
- **View Contents**: On line thirteen (13) in the example is "View Contents" (viewContents). In this section of the mutation, admins can list all attribute groups required to display in the configured tab.
- **GraphQL call**: On line seventeen (17) in the example is the "GraphQL call". This element in the mutation is meant for the admin writing the mutation. This element confirms when the GraphQL call is successful.

Configuration Tool

The Configuration tool is a feature that enables users with admin privileges to configure preset settings in Instrument. The tool can also be used to set a context for users under the admin Main settings. The purpose of the Configuration tool is to enable businesses to tailor and customize work areas to specific user roles within their organization, streamlining Instrument UI with simple steps to meet customer needs.

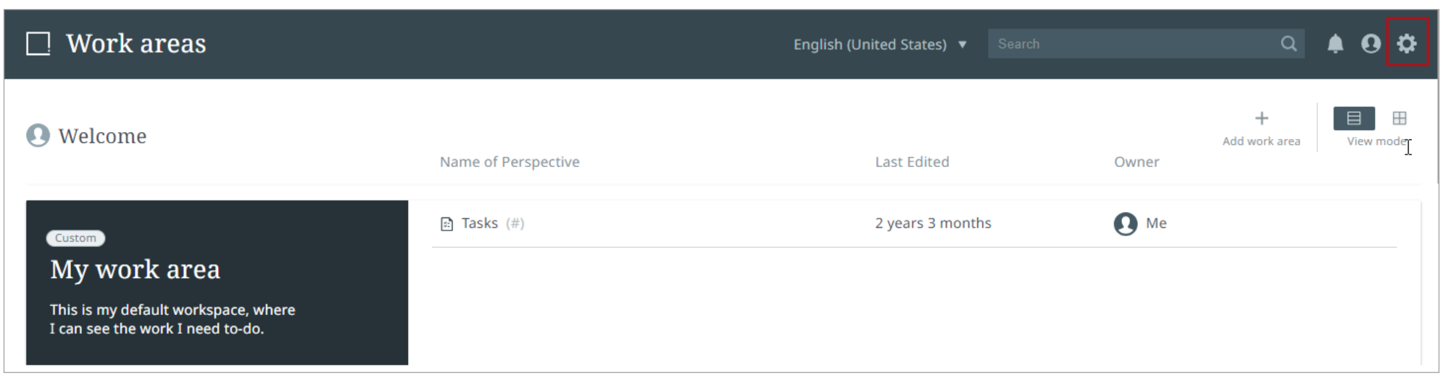
The Configuration Tool controls the following areas:

- **System settings**: sets context for users. For more information refer to the Configuration Tool System Settings topic.
- **Work areas and perspectives**: admin users can create preset (default) work areas and perspectives for users. For more information refer to the Configuration Tool: Creating Perspectives and Work Areas topic.
- **Tabs setup**: admin users can create default tabs in perspectives for users. For more information refer to the Configuration Tool Tabs Setup topic.
- **Specific views**: admin users can maintain Browse table configurations for end users. For more information refer to the Creating a Browse Perspective topic.
- **Actions**: admin users can create preset actions that are automatically triggered based on the type of action created. For more information refer to the Configuration Tool Actions topic.

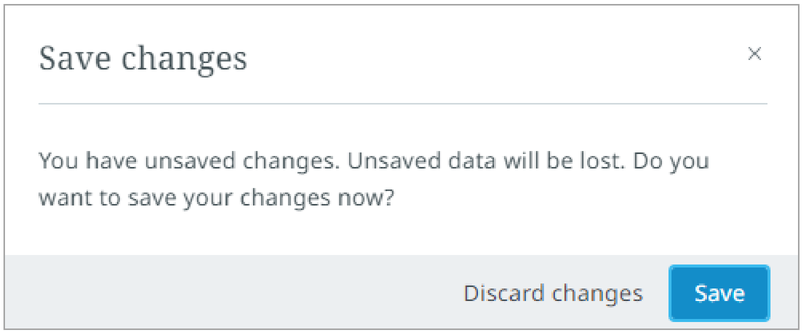
Accessing the Configuration tool

To access the Configuration tool, the admin user will need the "Web UI Administration" privilege (from Setup Actions). When an admin user is logged in, a gear icon displays in the upper right corner of the screen.

To use the Configuration tool, click the gear icon found to the far right in the utilities section.



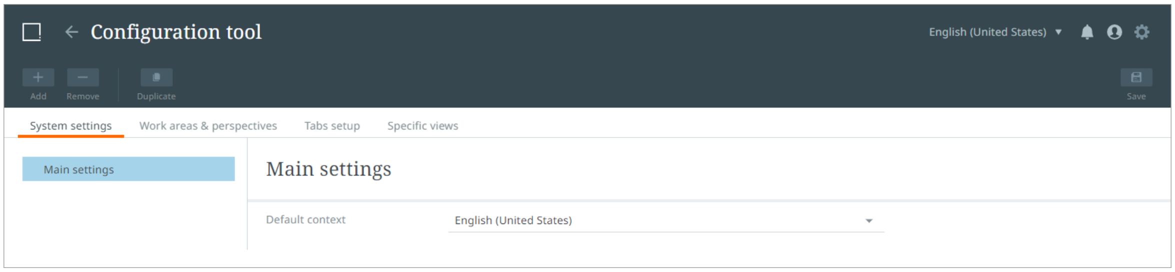
Any changes, deletions, or additions performed in the Configuration tool will not be auto-saved. If the admin user tries to leave the page without saving, the "Save changes" dialog will appear until "Save" or "Discard changes" has been selected. Users can also exit the dialog without saving changes by selecting the "x" in the upper right corner.


Save changes
You have unsaved changes. Unsaved data will be lost. Do you want to save your changes now?
Discard changes
Save

Configuration Tool System Settings

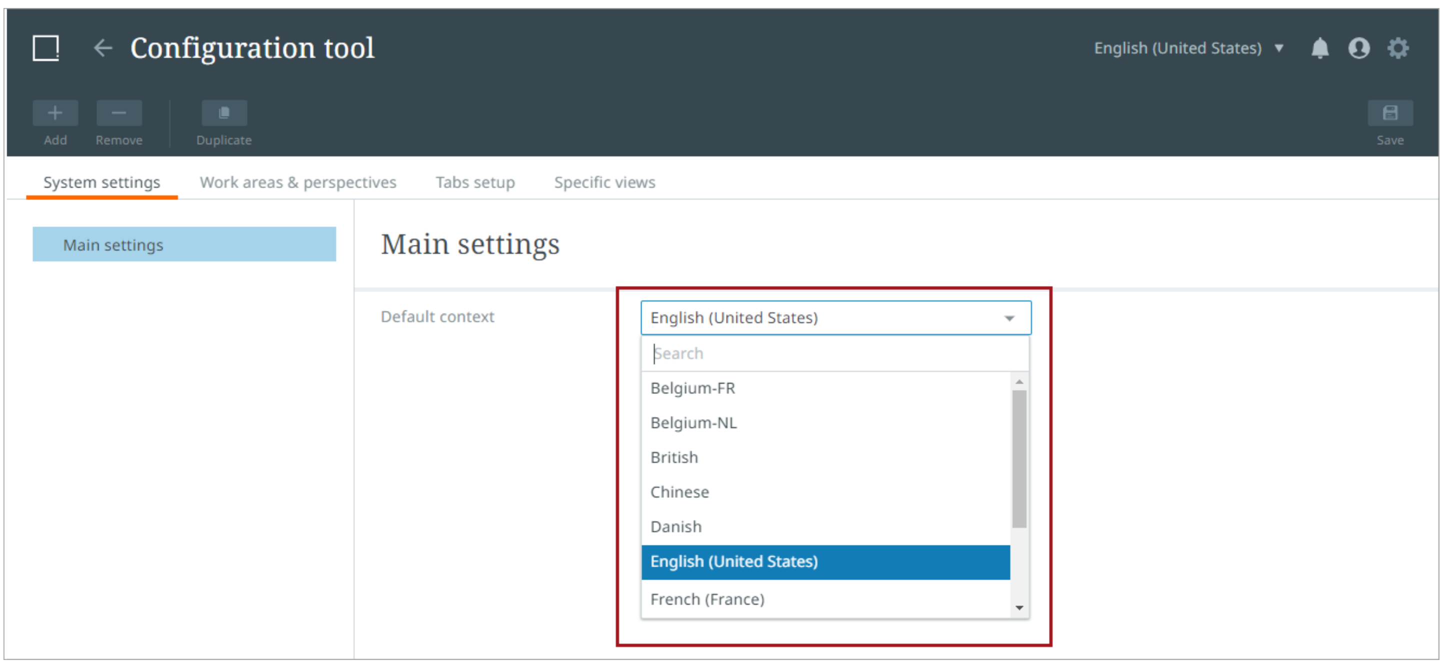
The Configuration tool system settings allows admin users to select default contexts for new users.

To access system settings, click the "System settings" tab in the Configuration tool. Here the admin user will be able to select features that will apply to all new users.



Setting the Default Context

To set the default context for new users, select the dropdown option next to "Default context" and select the desired context.



Once a context has been selected and changes have been saved, the selected default context will be the applied context for new users. However, users can select another context other than the default context. If a user selects a different context from the preset option, it will override the default context.

Note: Click "Save" in the upper right corner to keep all adjusted settings.

Configuration Tool: Creating Perspectives and Work Areas

Admin users can configure and manage preset work areas and perspectives in the Configuration tool. The tool can also be used to assign preset work areas and perspectives to user groups specific to tasks and roles.

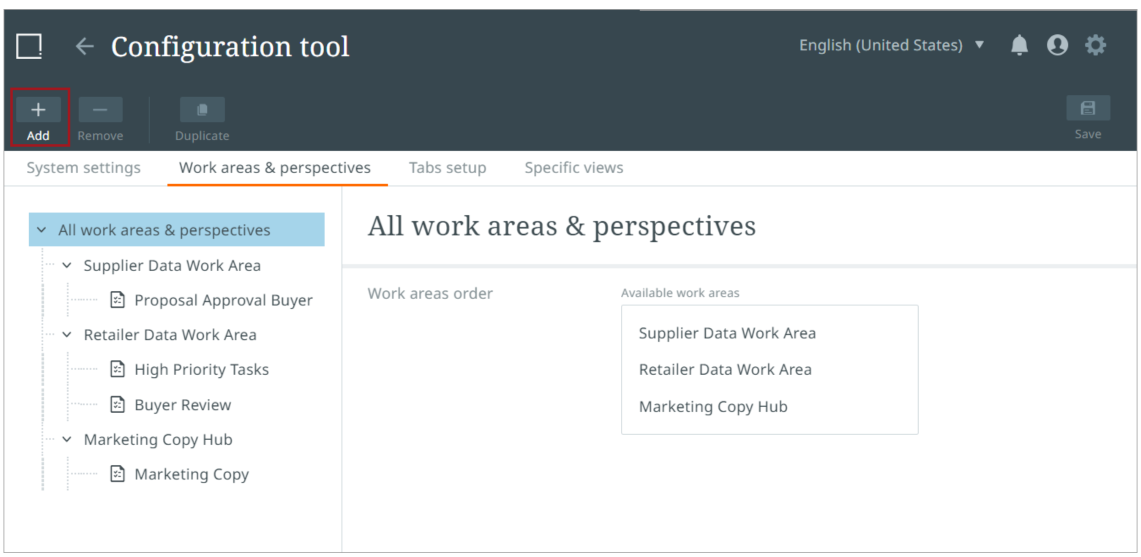
Preset work area and perspective configurations set by admin users become the default settings for assigned user groups. Preset columns and filters display to users as they have been set up by admins. Admin-defined filters cannot be removed by users once set. If a user attempts to delete a preset work area or perspective, a tooltip message displays stating, "You cannot overwrite admin configurations." However, users can still manipulate and maintain zoom levels, column width, as well as add and maintain new filters in preset perspectives. Upon saving these changes, the 'Reset perspective' feature is enabled which allows users to revert to default perspective settings defined by admins.

Preset work areas can be duplicated and further customized by users in the duplication. Custom work areas, identified by a "Custom" visual marker next to the work area name, are configured by the user and are customized based on user preferences and privileges.

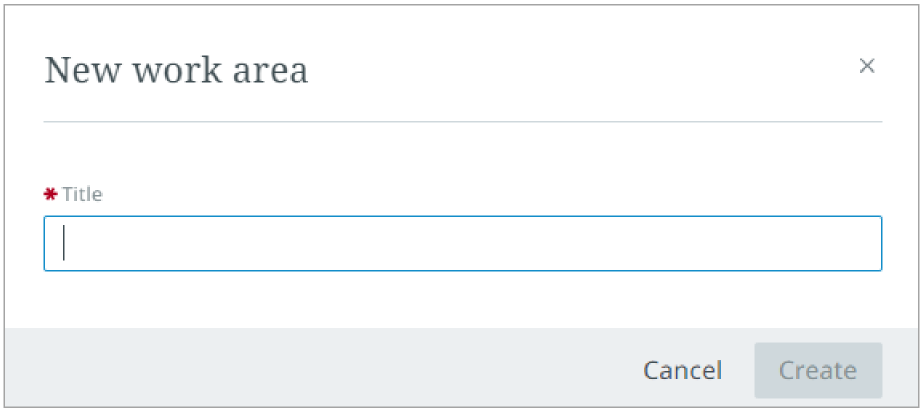
Creating and Maintaining Work Areas

The Configuration tool allows admin users to create and maintain work areas.

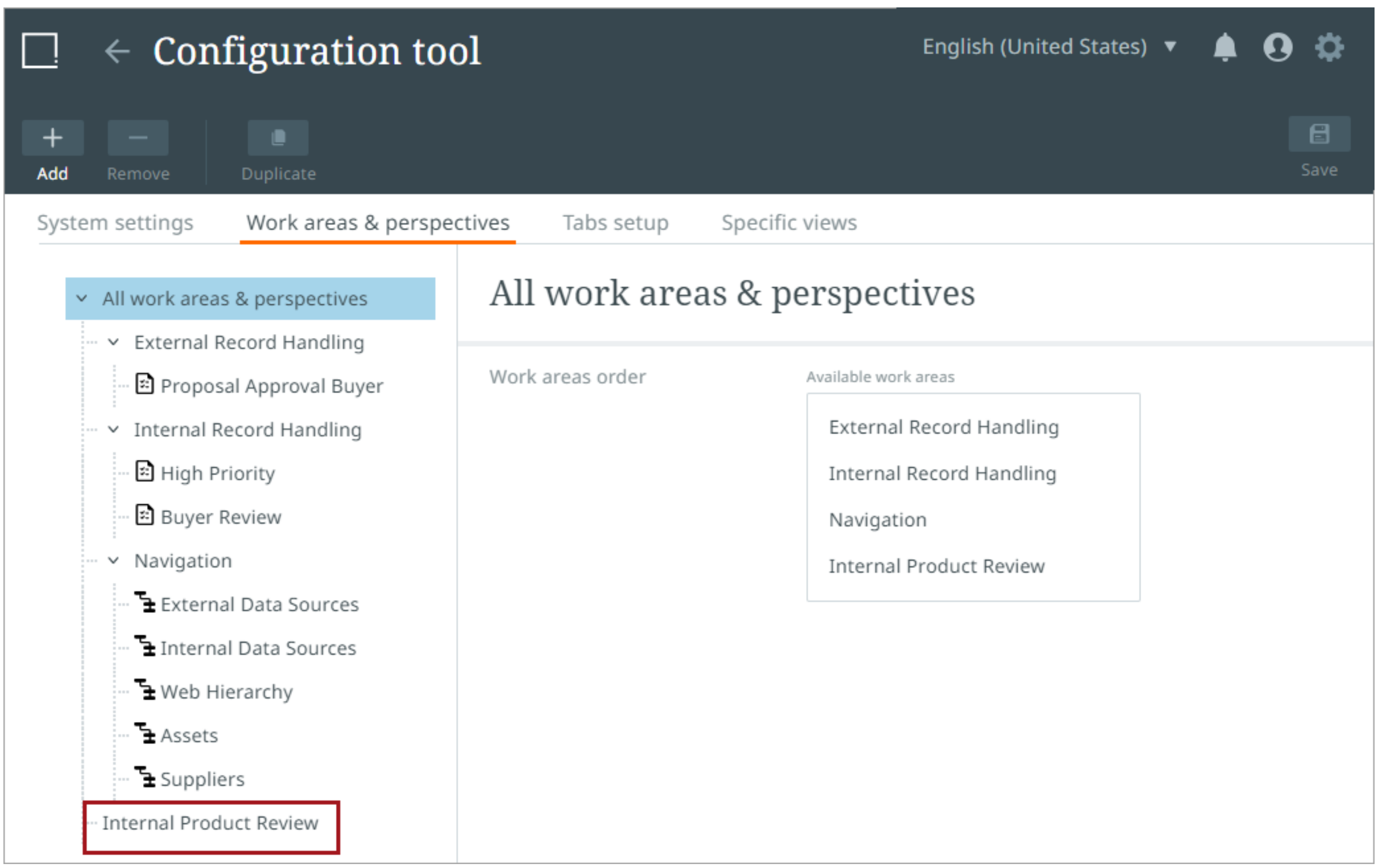
1. To create a new work area, click the "Work areas & perspectives" tab on the Configuration tool homepage.
2. Click the "+" in the top-left corner of the page. A dropdown menu displays.



3. Select "New work area." A "New work area" dialog will display. Mandatory fields will be marked with an asterisk "*". Users cannot create a work area without completing the mandatory fields.



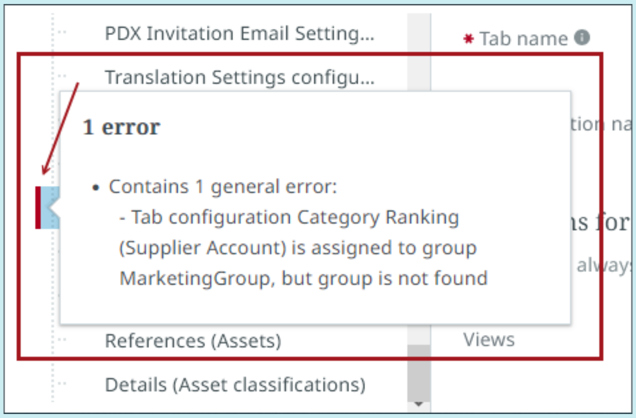
4. Create a title for the work area.
5. Click "Create" to create the new work area. The new work area will display in the navigation menu on the left of the page.



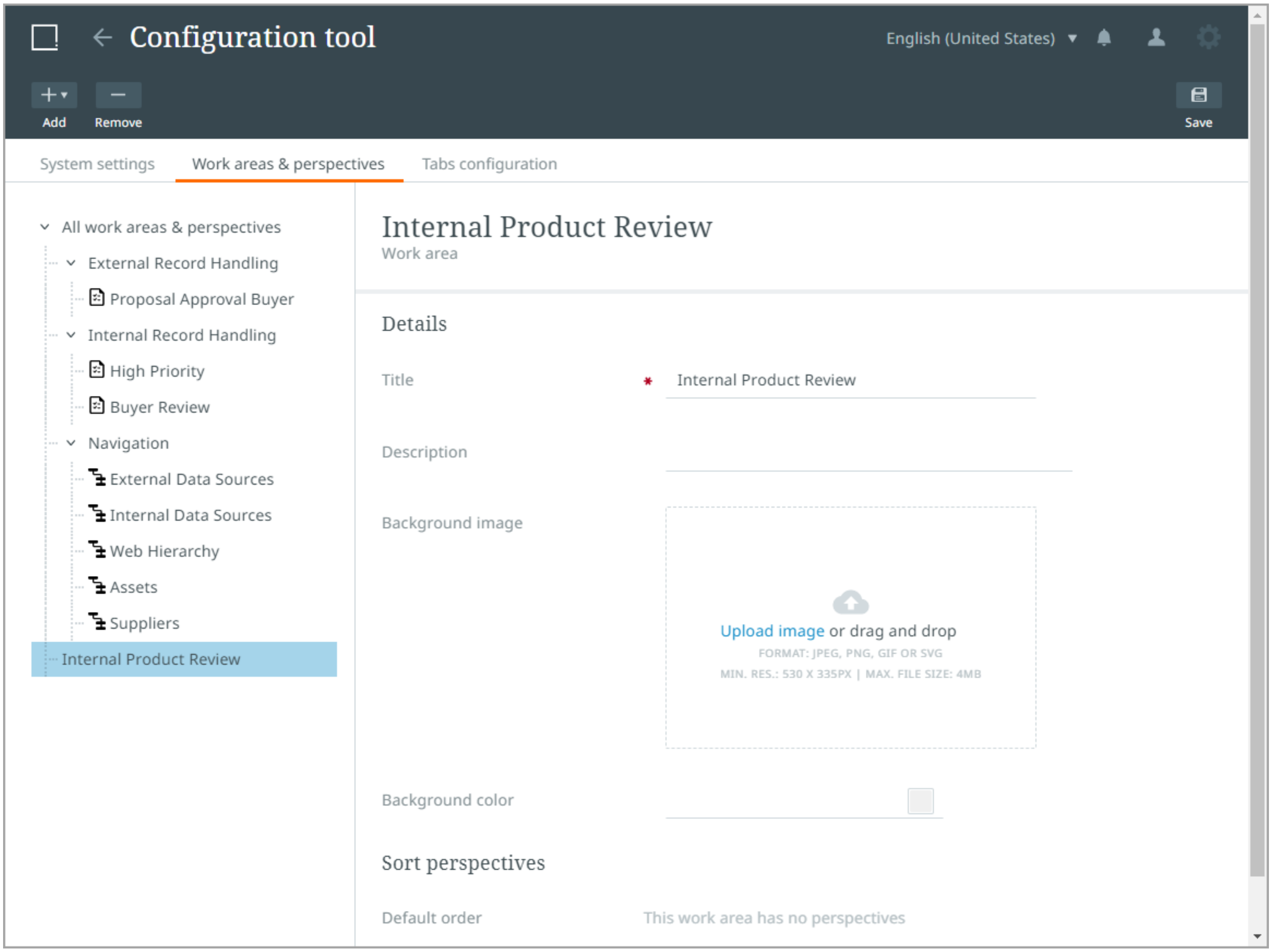
To open the new work area, select it from the left navigation panel. When it is open, the user can further customize the work area by adding a description, background image, and background color.

To save changes, click the "Save" icon in the upper right corner of the page.

Note: If a work area, perspective, view, or tab is misconfigured, a red-line error indicator will display to the left of the affected configuration element. Hovering the cursor over the red line prompts an informational pop-up to display. The pop-up describes the issue causing the configured element to be misconfigured, (as shown in the screenshot below), giving the user the information needed to make the appropriate change.



Until the configuration is corrected, the 'Save' and 'Duplicate' buttons will be inoperative.



Duplicating a Work Area

To duplicate a **work area**:

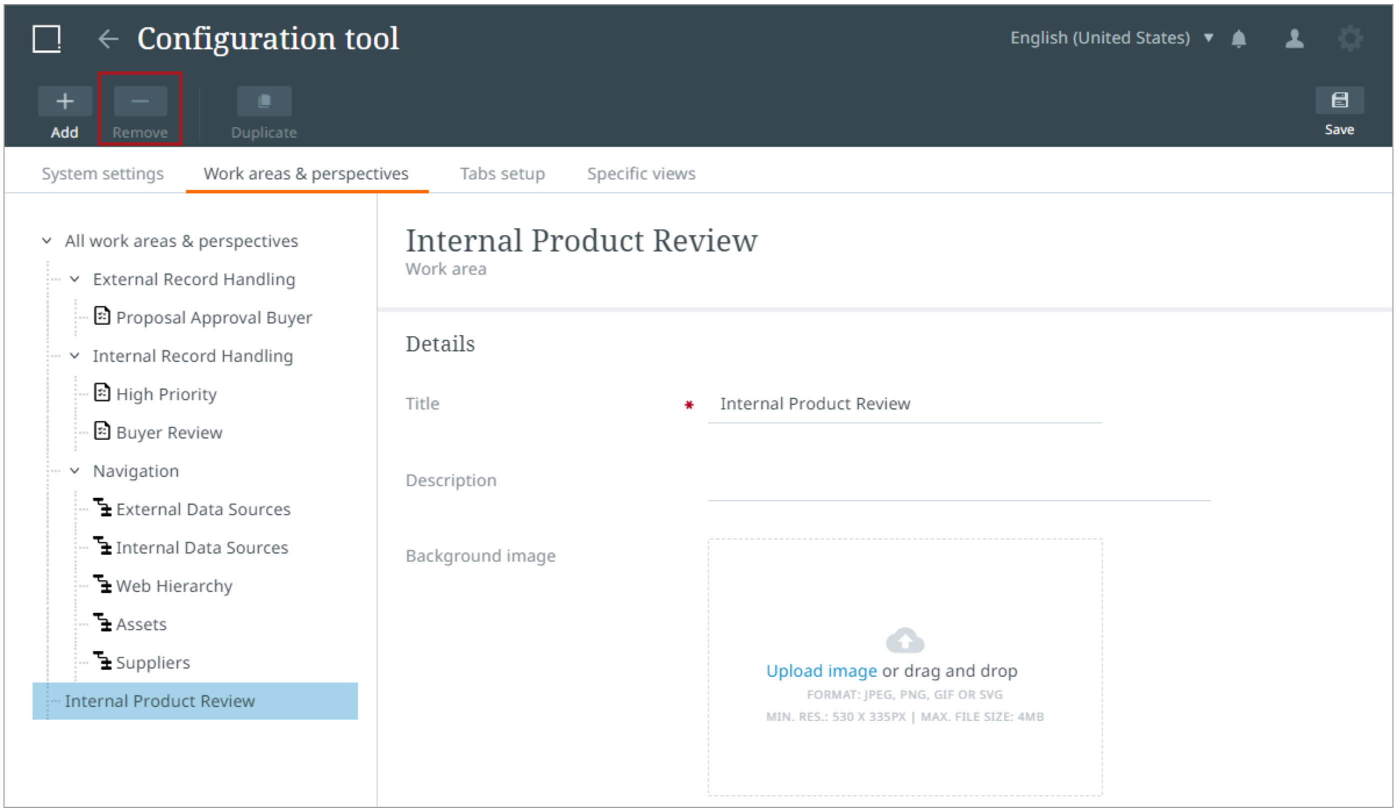
1. Select a work area configuration in the tree on the left by clicking it.
2. Click the "Duplicate" button in the Tool bar.

The new duplicated configuration will be placed at the bottom of the tree. The newly duplicated configuration will have the same title of the original configuration with a “(1)” added at the end of the title of the duplicated configuration.

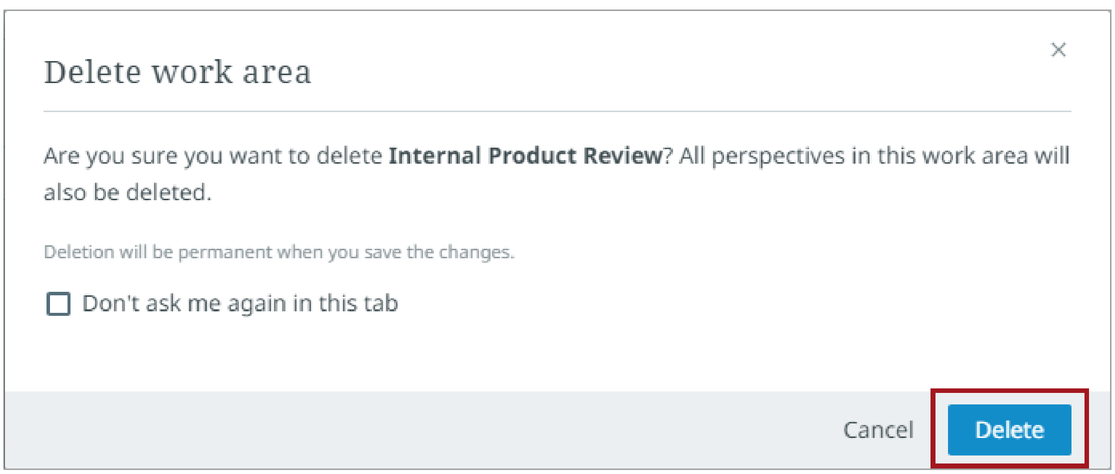
Removing a Work Area

Users can remove work areas using the Configuration tool.

1. To remove a work area, select the work area in the left navigation panel.
2. Next, click the "Remove" button in the tool bar at the top right of the page.



3. A dialog will display to confirm if the user wants to delete the work area. The dialog has an optional selection box that states "Don't ask me again in this tab." When checked, the "Delete tab" warning dialog will not display again, and the remove button will immediately delete the selected tab when the "-" button is selected.

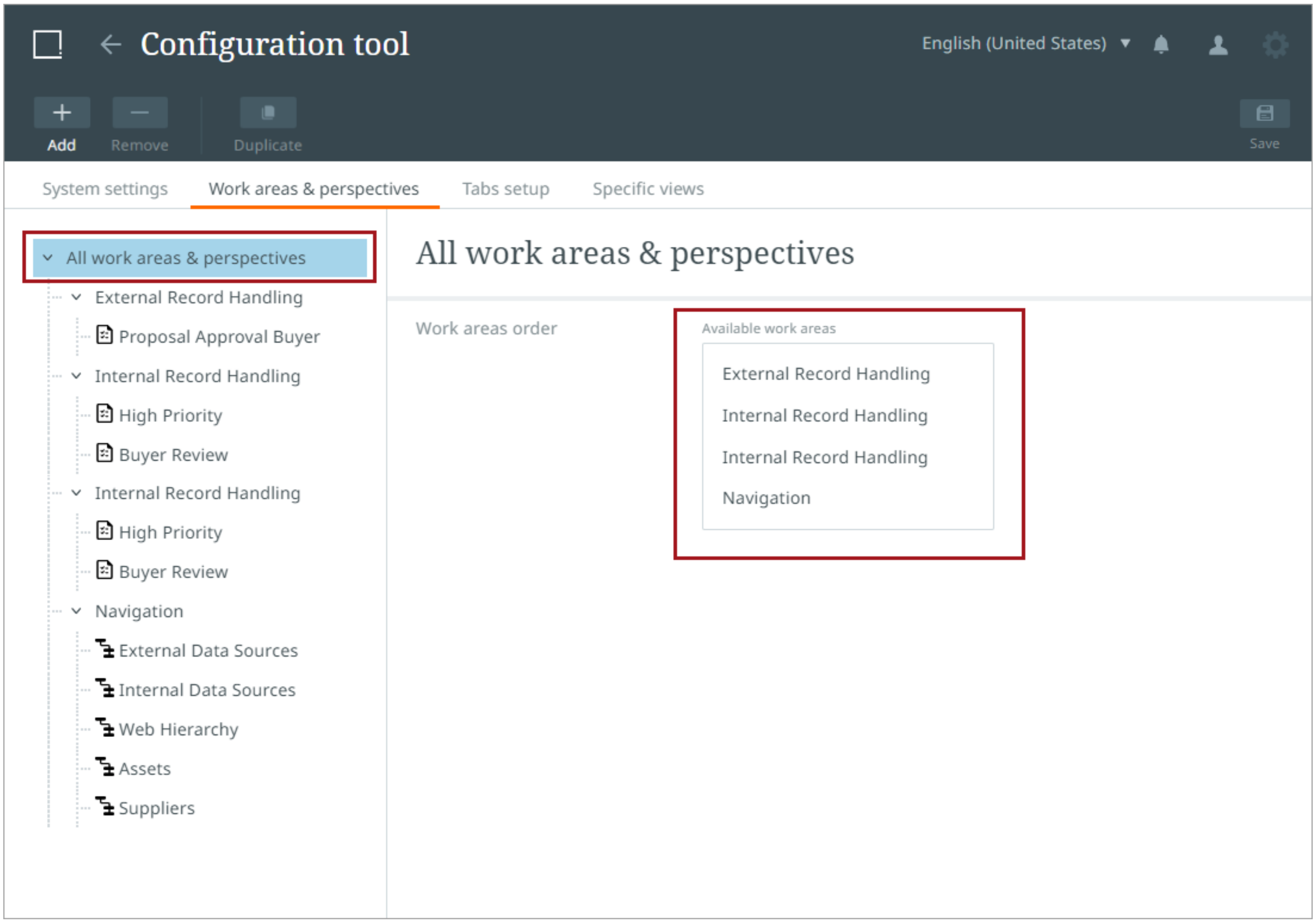


4. Select "Delete" and then click "Save" to finalize deletion of the work area.

Sequencing Work Areas

Users can sequence or order work areas in the Configuration tool.

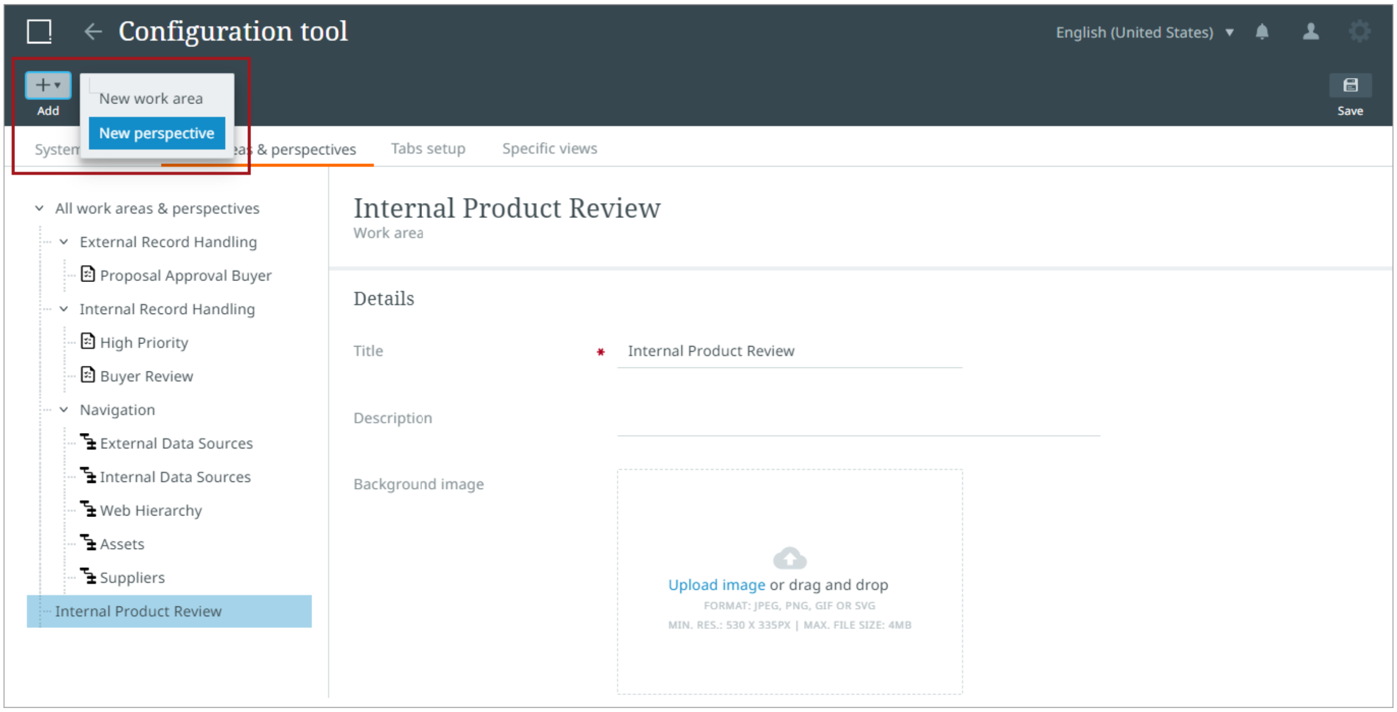
1. To sequence a work area, select the "All work areas & perspectives" root node in the Tree to the left.
2. Then inside of the "Available work areas" box, select a work area to move by clicking it, and drag and drop the work areas in the desired order.



Creating and Maintaining Tasks Perspectives

Users can also create and maintain Tasks perspectives in the Configuration tool.

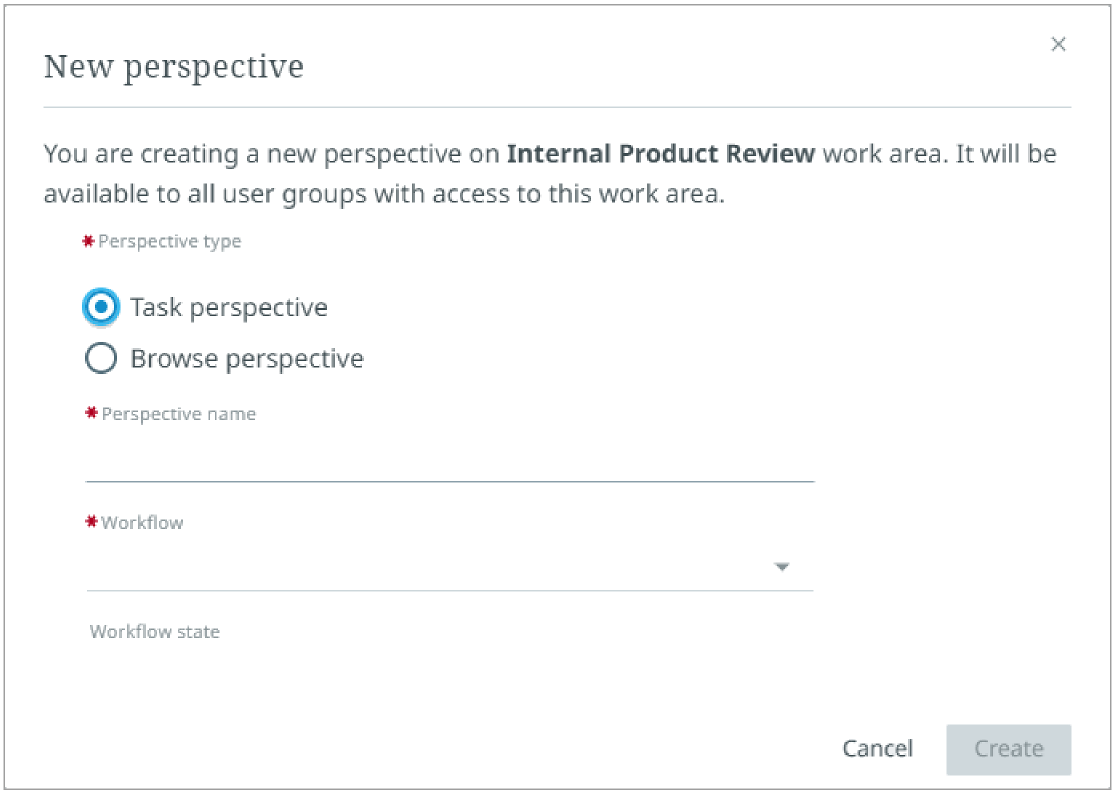
1. To create a new Tasks perspective, click the "+" sign in the upper right corner of the page. A dropdown menu will display. Select "New perspective."



2. A "New Perspective" dialog will display. Mandatory fields in the dialog will be marked with a red asterisk "*". Users cannot create a perspective without completing the mandatory fields.

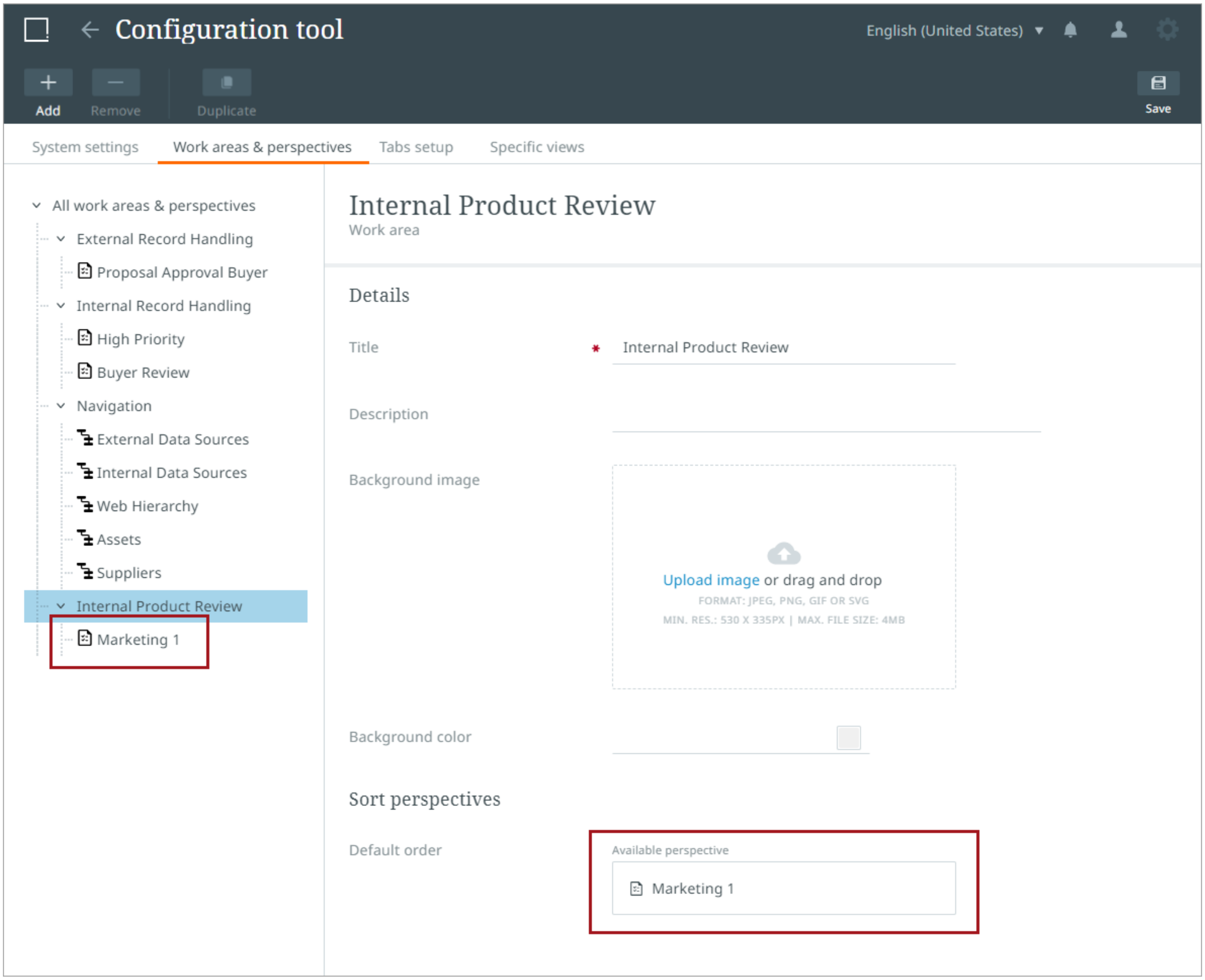
   Name the Tasks perspective and select a workflow. If the Tasks perspective is designed for users who will only need to view a single workflow state, also select a workflow state. If the perspective is designed for a user that needs to view all states in the workflow, leave the "Workflow state" field blank.

   When all fields are complete the "Create" button will become active.

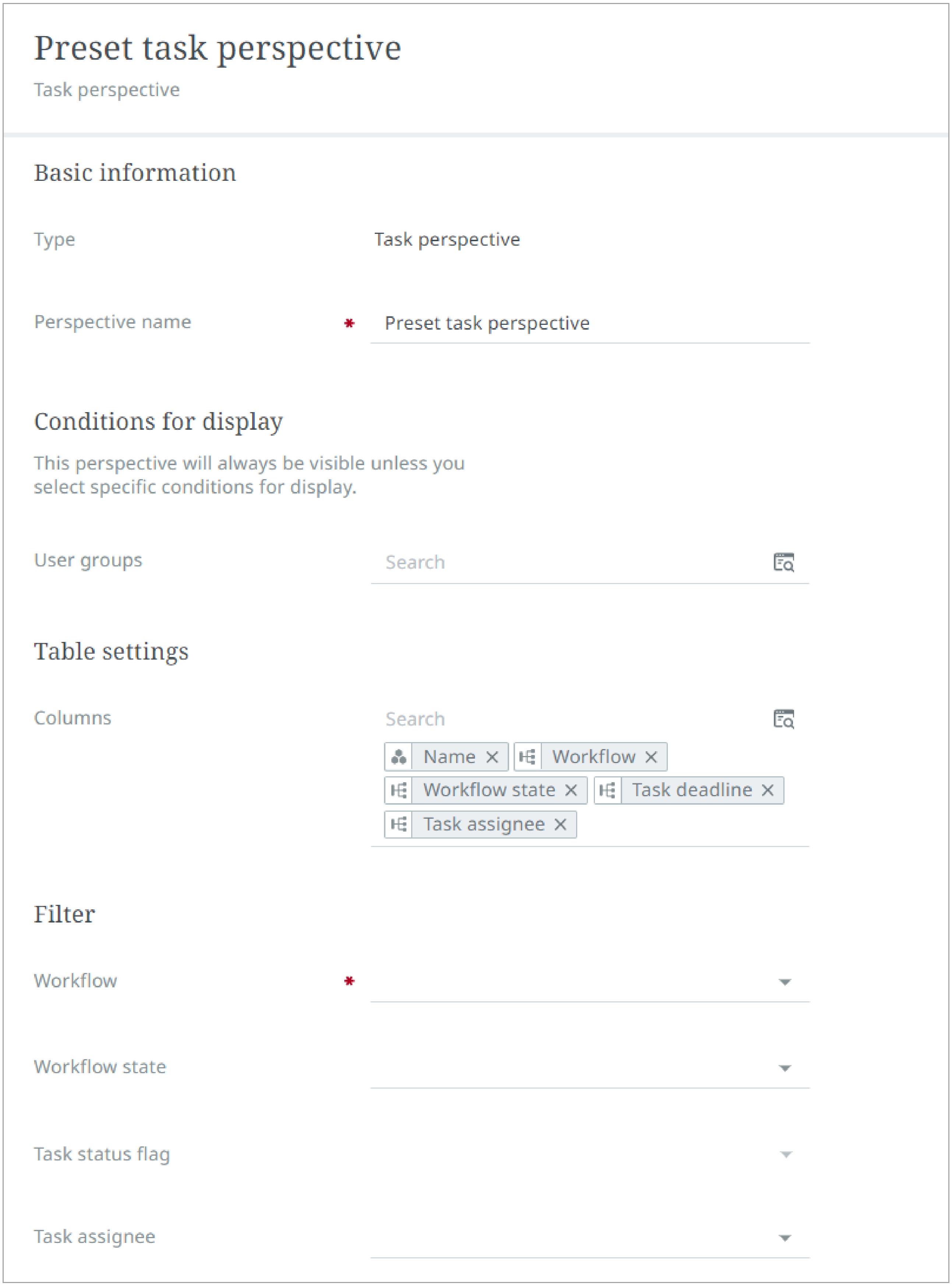


3. Click "Create" to create the new perspective. Next, click "Save " to save the new Tasks perspective.

The new perspective will display beneath the work area in the navigation tree menu on the left side of the page as well as under the "Sort Perspectives" option on the work area editor screen.



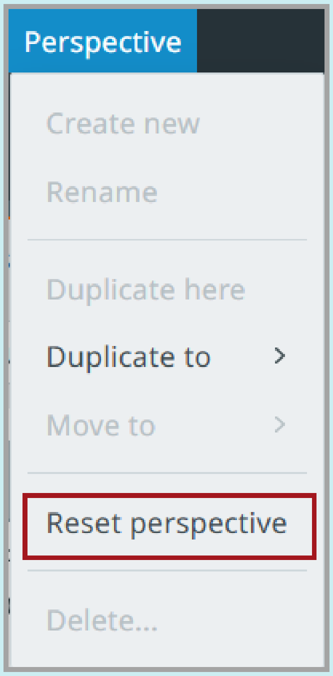
After the perspective has been created, the user can customize default table columns, change the name of the perspective, and select filters. Users can select one or more user groups to assign to the perspective. Only those users that belong to the selected user group(s) will be able to view the perspectives within the work area. When no user group is selected, the perspective will be available to all user groups. The surrounding work area will be available to the users if they have access to the corresponding perspective.

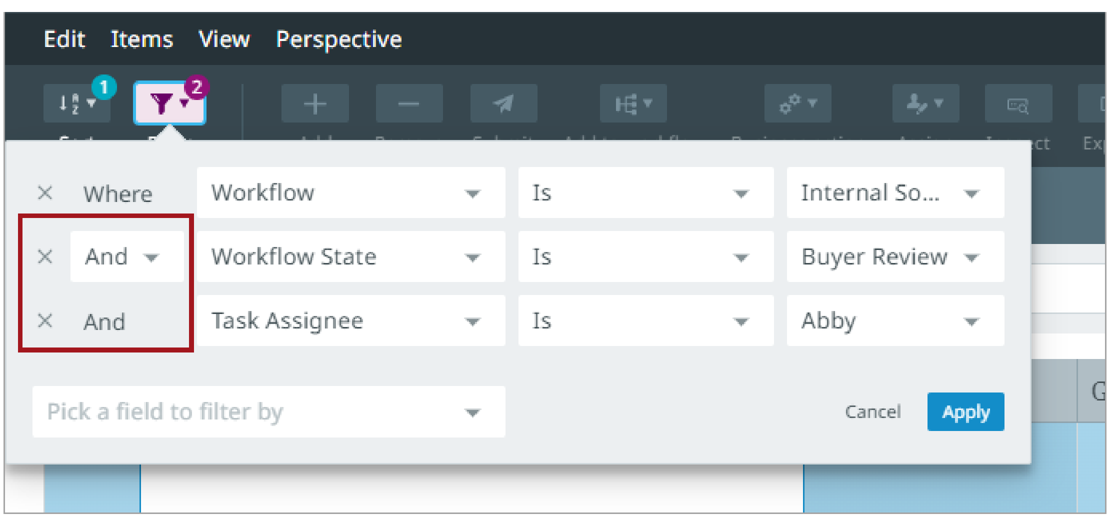

Preset task perspective
Task perspective
Basic information
Type
Task perspective
Perspective name
Preset task perspective
Conditions for display
This perspective will always be visible unless you select specific conditions for display.
User groups
Search
Table settings
Columns
Search
Name
Workflow
Workflow state
Task deadline
Task assignee
Filter
Workflow
Workflow state
Task status flag
Task assignee

Filter options will filter the data that displays in the table for Tasks perspectives. Available filters include: Workflow, Workflow State, Workflow Status flag, and Workflow assignee. As filters are selected, the Configuration tool includes an implicit "AND" between the filters, resulting in a cumulative filter search.

The image below shows how the filters display in the Work area after they have been saved in the Configuration tool.

Note: Admin-defined filters cannot be deleted or overwritten by users once set. A tooltip message displays stating, "You cannot overwrite admin configurations." However, other filters can be added to the preset filters by users. Users can reset their preset settings at any time by selecting "Perspective" and then "Reset perspective."





To duplicate a **perspective**: Select a perspective configuration in the tree on the left by clicking it.

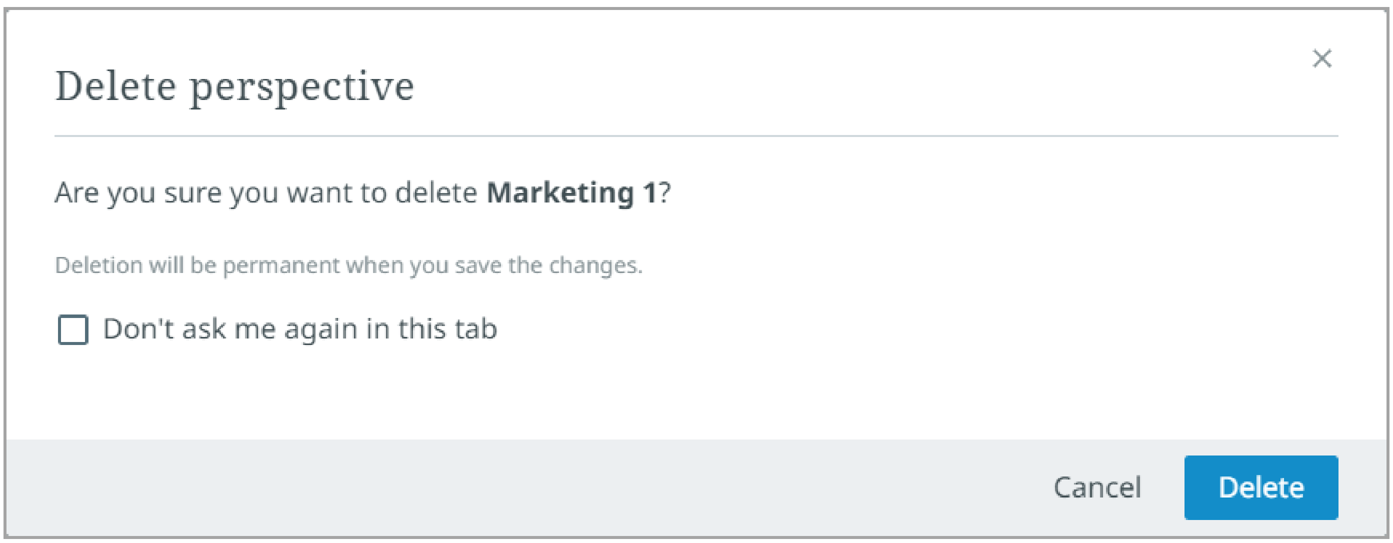
Duplicating a Perspective

1. Click the "Duplicate" button in the Tool bar. A drop-down option will display with two options:
   - Duplicate here: Choose this option to duplicate a perspective to the current work area
   - Duplicate to: Choose this option to select a different work area for the perspective duplicate

Removing a Perspective

Users can remove a perspective using the Configuration tool.

1. To remove a perspective, click the perspective in the left navigation panel.
2. Click "Remove" in the toolbar in the upper left corner of the page.
3. A dialog will display to confirm if the user wants to delete the perspective. The dialog has an optional selection box that states "Don't ask me again in this tab." When checked, the "Delete tab" warning dialog will not display again, and the remove button will immediately delete the selected tab when the "-" button is selected.



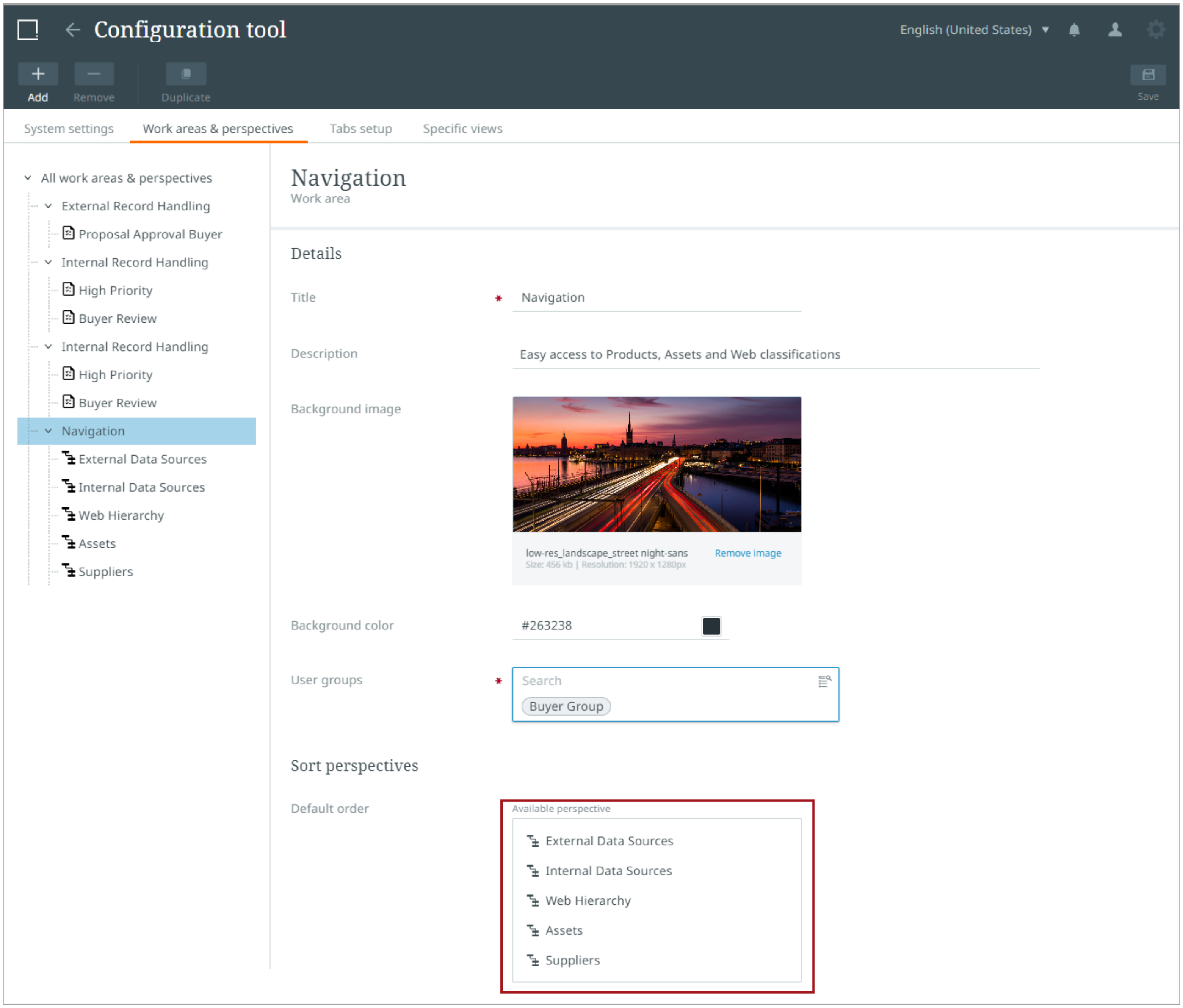
4. Click "Delete" and then click "Save" to finalize deletion of the perspective.

Sequencing Tasks Perspectives

Users can sequence or order Tasks perspectives using the Configuration Tool.

1. Select the "owning" work area in the tree on the left side of the page.
2. Perspectives will be listed beneath the "Sort Perspectives" section at the bottom of the page inside the "Available perspective" box. Click a perspective to drag and drop the

perspective to the desired order.



Creating a Browse Perspective

Admin users can configure and manage preset Browse perspectives in the Configuration tool. Preset Browse perspectives cannot be changed by end users without admin privileges. Only admin users can alter table configurations using the Configuration tool within preset Browse perspectives. Customize view for preset Browse perspectives is disabled for admin and end users.

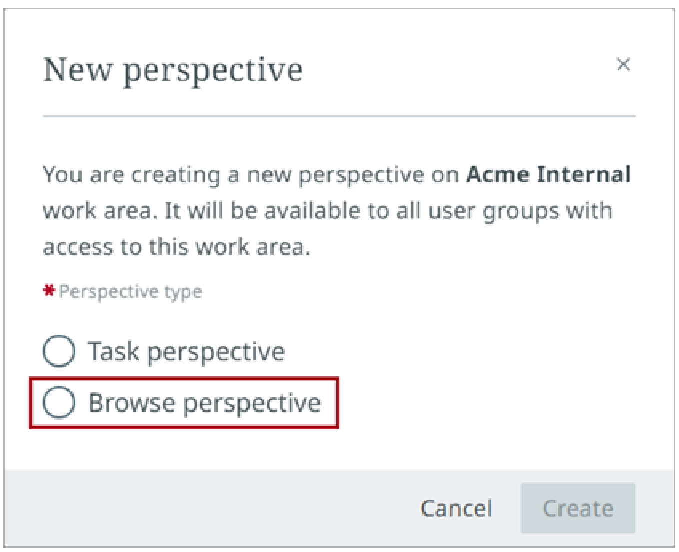
Preset work area and perspective configurations set by admin users become the default settings for assigned user groups. Preset columns and filters display to users as they have been set up by admins. Admin-defined filters cannot be removed by users once set. If a user attempts to delete a preset work area or perspective, a tooltip message displays stating, "You cannot overwrite admin configurations." However, users can still manipulate and maintain zoom levels, column width, as well as add and maintain new filters in preset perspectives. Upon saving these changes, the 'Reset perspective' feature is enabled which allows users to revert to default perspective settings defined by admins.

Preset work areas can be duplicated and further customized by users in the duplication. Custom work areas, identified by a "Custom" visual marker next to the work area name, are configured by the user and are customized based on user preferences and privileges.

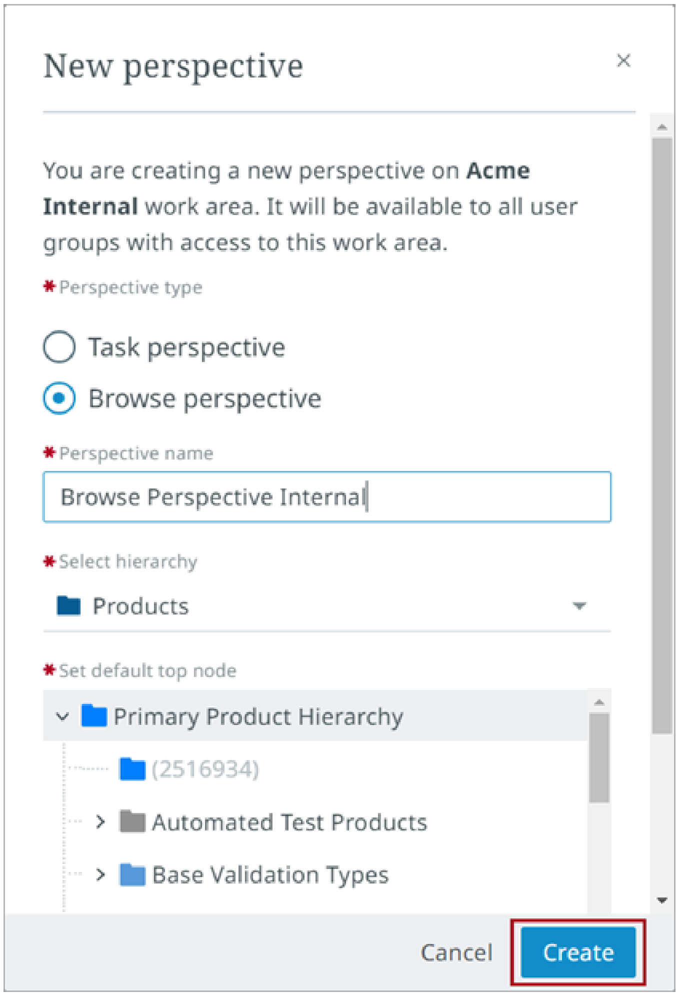
After a work area has been created for selected user groups, admin users may create Browse perspectives.

1. To create a Browse perspective, click the “+” sign in the upper right corner of the page. A dropdown menu will display. Select "New perspective."

2. Mandatory fields in the dialog will be marked with a red asterisk "*". Users cannot create a perspective without completing the mandatory fields.



Name the Browse perspective, select a hierarchy, and a top item. When all fields are complete the "Create" button will become active.



3. Click "Create" to create the new perspective. Next, click "Save " to save the new Browse perspective.

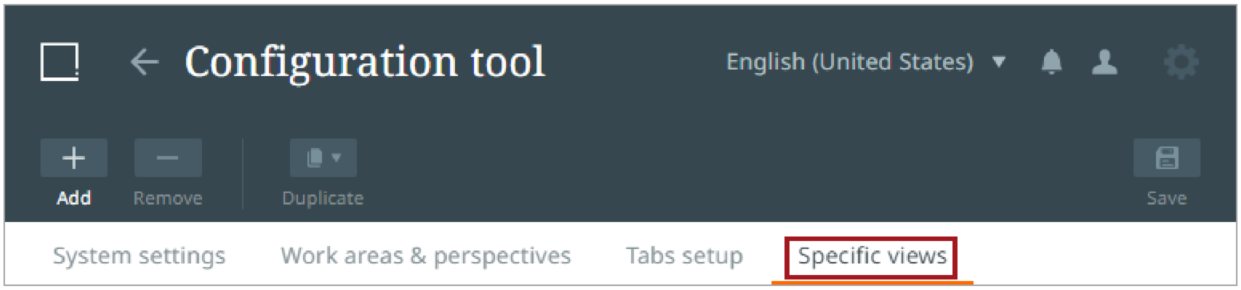
   The new perspective will display beneath the work area in the navigation tree menu on the left side of the page.

   Note: Beneath the hierarchy box, there is a shortcut from the perspective configuration to the browse table. Click “Go to Browse tables” to go directly to the browse table

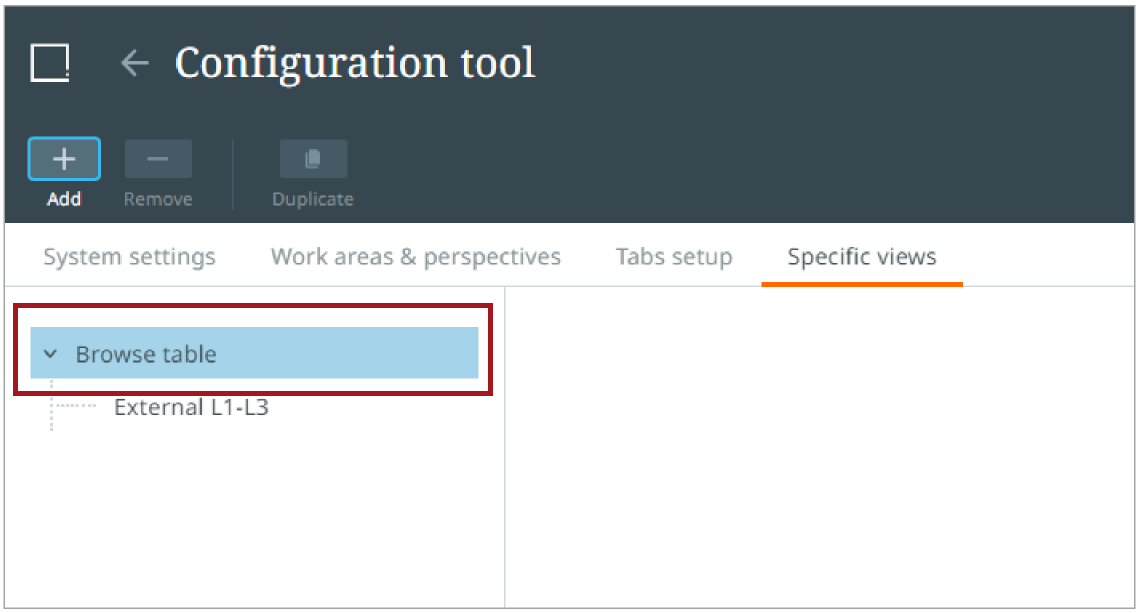
Creating a Browse Table Configuration in Specific Views

Browse table configurations for end users can be maintained by admins in the Configuration tool under the Specific views tab. These tables are displayed when an end user selects a item in the Browse perspective tree. The browse table configurations are object type specific. One browse table configuration can be assigned to one or more object types. An object type can only be assigned to one browse table configuration.

1. To create a new browse table configuration, select the Specific Views tab.



2. Select the “Browse table” root item in the tree.



Click the “+” in the upper right corner of the page. A “New Browse Table” dialog will display. Name the configuration and select one or more object types.

3. Click “Create” to create the new browse table configuration. Five default columns will display in the “Table settings” section: ID, name, object type, completeness, and primary image. Admin users can customize which columns display as well as add attributes, attribute groups, and reference types using the search field or Item Picker. Using the Item Picker, admins can select the column sequence by dragging and dropping the order of the columns in the “Selected Columns” section.

STIBO SYSTEMS
MASTER DATA MANAGEMENT

Configuring Target Language Translation Status

The option for administrators to add target language translation statuses for Browse and Tasks perspectives can be found in the Configuration tool. For Browse and Tasks perspectives in custom work areas, users can add or remove target language translation statuses using the Customize option in the toolbar.

Translation status options are populated based on the language dimension points that have been configured in STEP. You should be familiar with the following STEP concepts:

- The Dimensions, Dimension Points, and Contexts section of the System Setup documentation will explain how to set up your language dimension points.
- The Translations section will provide an overview of how translations work in STEP.

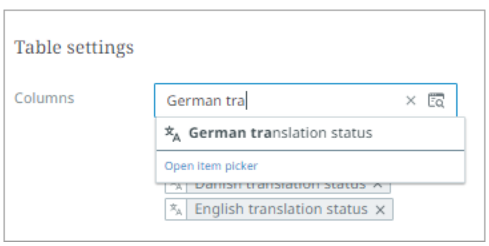
Administrators

Enter the Configuration tool by clicking the gear icon found to the far right in the utilities section of the toolbar.

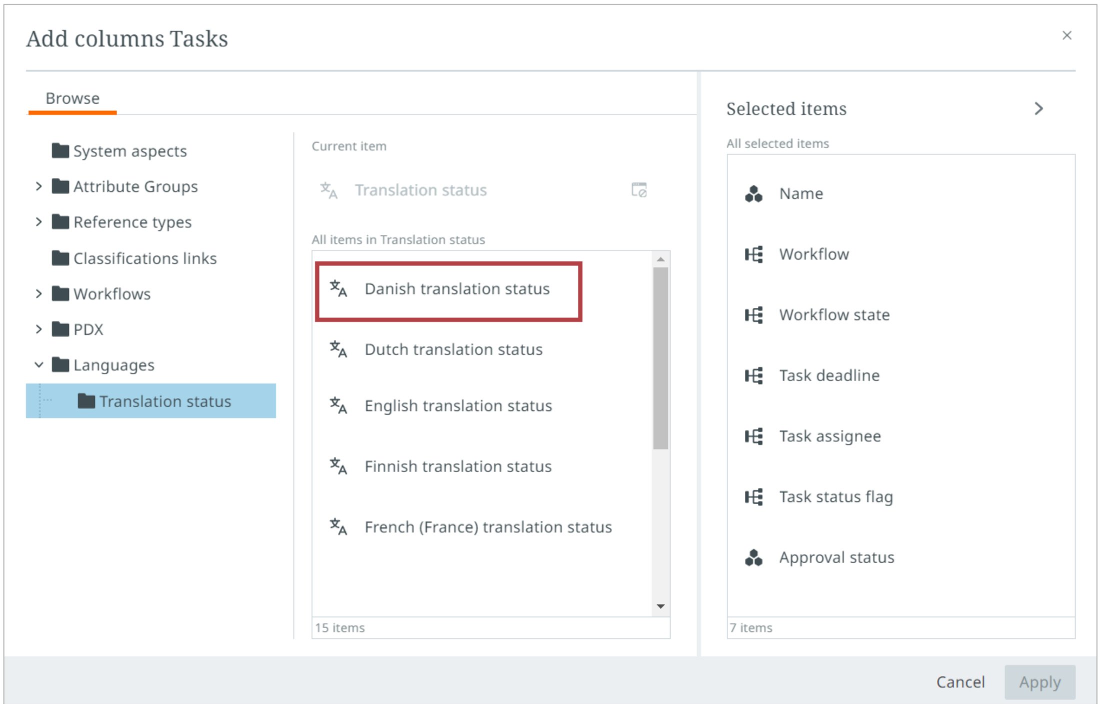
Work Areas and Perspectives Tab

To add the languages column to a preset work area using the Work areas and perspectives tab:

1. Select the Work areas and perspectives tab. Navigate to the desired Tasks perspective.
2. Navigate to the “Table settings” heading. In the columns section, there are two ways to access the “Languages” option:
    - Use the typeahead search to select the desired language(s).



- Use the item picker and select Languages > Translation status. Select the desired language(s).



3. Apply and then save all of your changes by clicking the Save button in the header area of the screen.

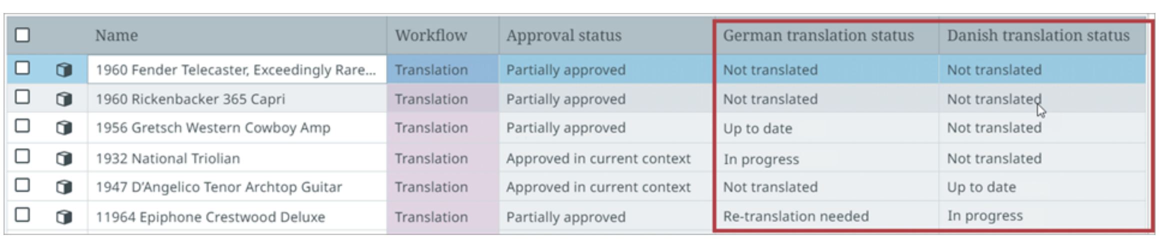
Specific Views Tab

To add the languages column to a preset Browse perspective as an admin using the Specific views tab:

1. Select the Specific views tab. Navigate to the desired browse table.

Follow steps 2 and 3 from the Work areas and perspectives tab instructions above to navigate the item picker and typeahead options.

Once changes have been saved, tables in the applicable Tasks and Browse perspectives will display the target language translation status column(s) with the corresponding translation status for each product displayed:



Name	Workflow	Approval status	German translation status	Danish translation status
1960 Fender Telecaster, Exceedingly Rare...	Translation	Partially approved	Not translated	Not translated
1960 Rickenbacker 365 Capri	Translation	Partially approved	Not translated	Not translated
1956 Gretsch Western Cowboy Amp	Translation	Partially approved	Up to date	Not translated
1932 National Triolian	Translation	Approved in current context	In progress	Not translated
1947 D'Angelico Tenor Archtop Guitar	Translation	Approved in current context	Not translated	Up to date
11964 Epiphone Crestwood Deluxe	Translation	Partially approved	Re-translation needed	In progress

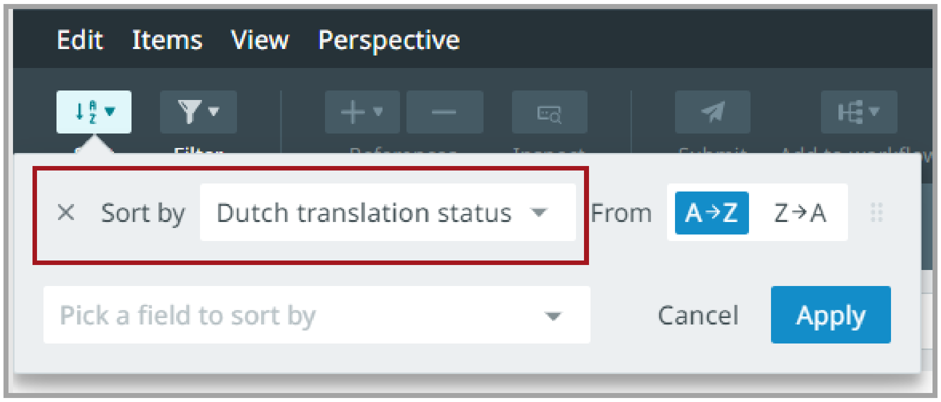
Translation Status

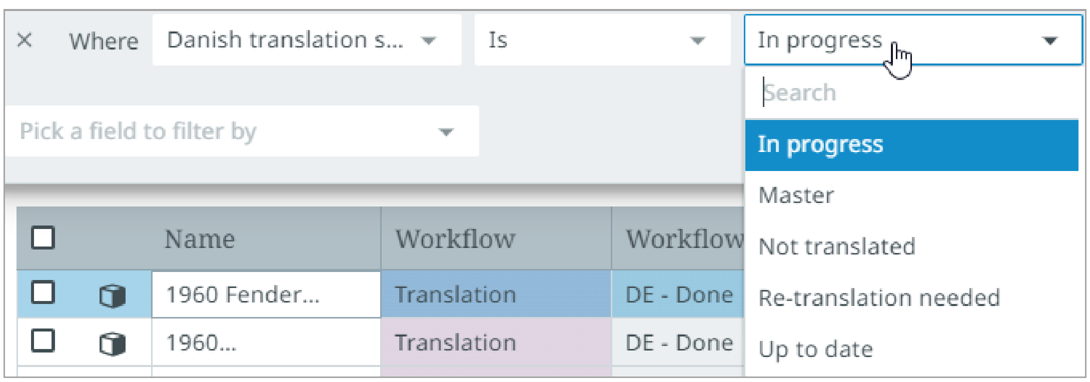
The translation status column displays the following statuses:

- **In progress**: Content to be translated has been exported, but translated content received from the translator vendor has not been imported yet.
- **Master**. This is the first language used as the source language.

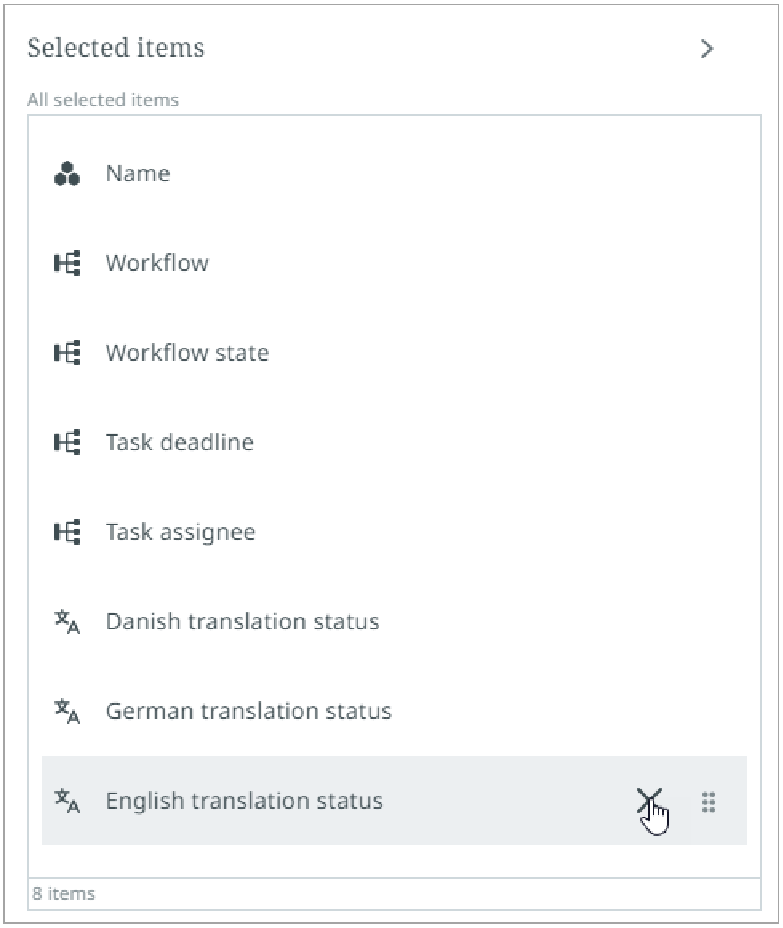
- **Not Translated**: Object has never been translated.
- **Re-translation needed**: Translated content in the source language has changed since last translation.
- **Up to date**: Translated content in the source language has not been changed since last translation.

You can sort and filter the target language column:



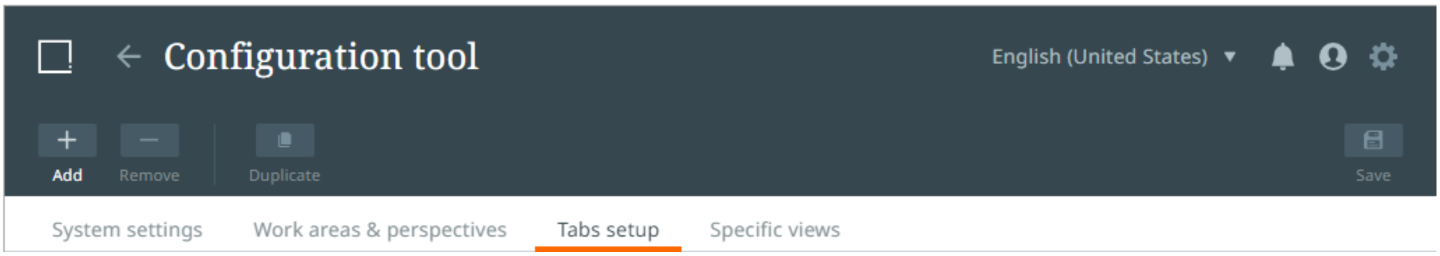


To remove a target language column, users in custom work areas can select the “Customize” option and remove selected languages by selecting the “X” next to the language to be removed.

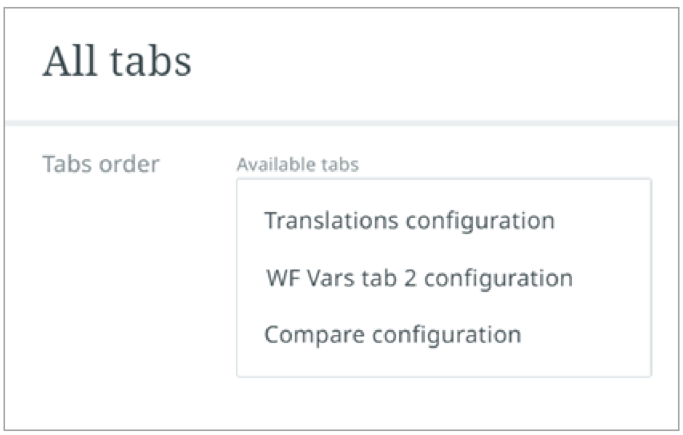

Selected items
All selected items
Name
Workflow
Workflow state
Task deadline
Task assignee
Danish translation status
German translation status
English translation status
8 items

Configuration Tool Tabs Setup

The Configuration tool's "Tabs setup" functionality allows admin users to configure preset tabs for the details view. To access the "Tabs setup" page, click on the Configuration tool icon in the upper-right hand corner of the screen. From the configuration tool home page, click on the "Tabs setup" option.



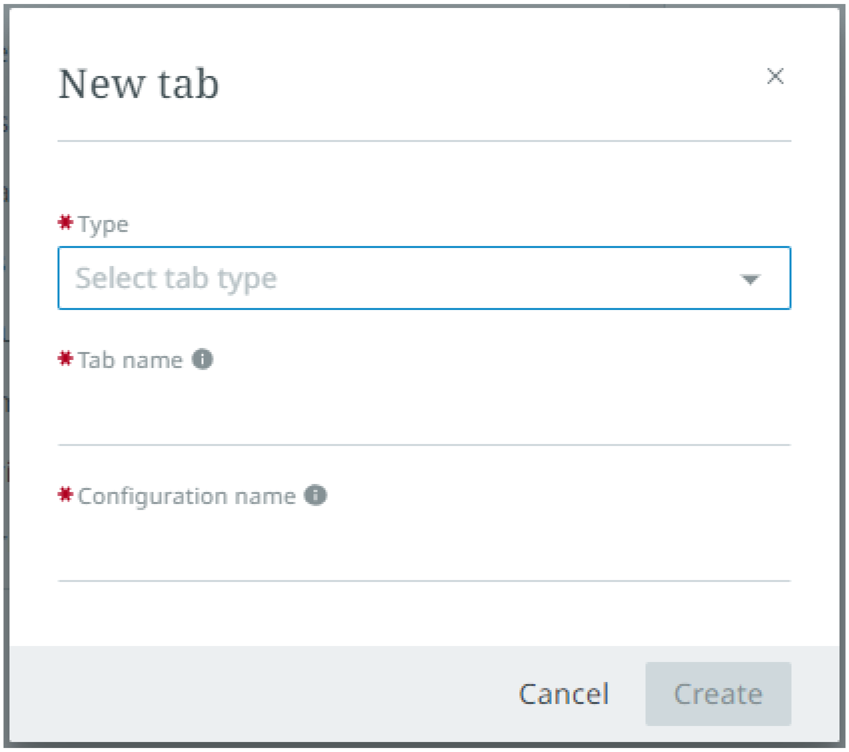
The "Tabs setup" page will display all created tabs. Configured tabs will be listed on the left side of the page. Select a tab to view details.



Adding a Tab

To add a tab:

1. Click the "+" button in the toolbar. The "New tab" dialog will display.



2. Select the type of tab to create: "Attribute tab page," "Asset tab page," "Reference tab page," "Packaging tab page," or "Language tab page."
3. Provide a name for the "Tab name" field. A value will auto-populate for the "Configuration name" field derived from the value provided for the "Tab name" field. Users can revise this value as needed.

> **Note:** The Configuration name is only displayed for admin users and only displays in the Configuration tool. End users cannot view the Configuration name.

4. Click "Create" to create a tab. The new tab will display in the tree on the left side of the screen.

Configuring the Tab

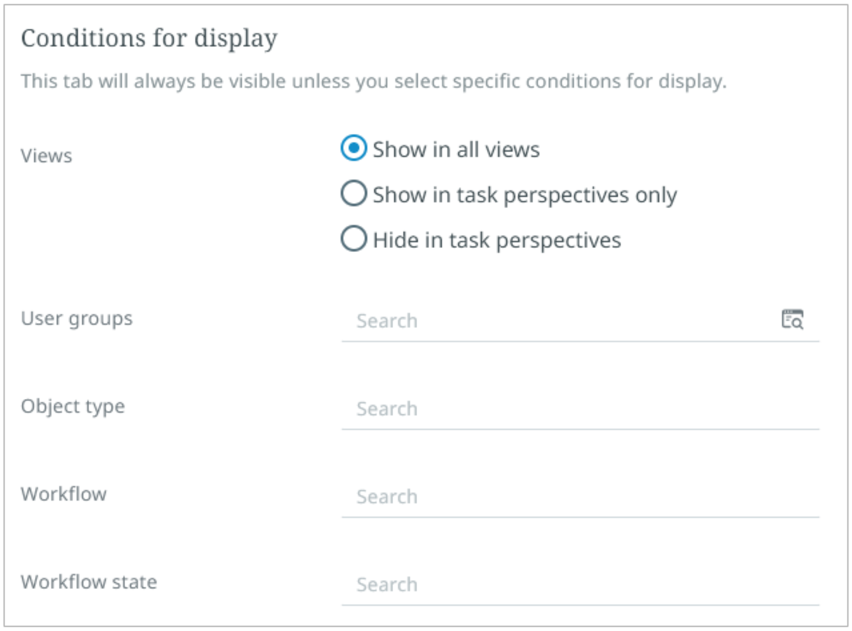
The options available to configure a tab enable the Instrument UI admin to determine:

- when the tab displays
- for whom the tab displays
- the data the tab displays

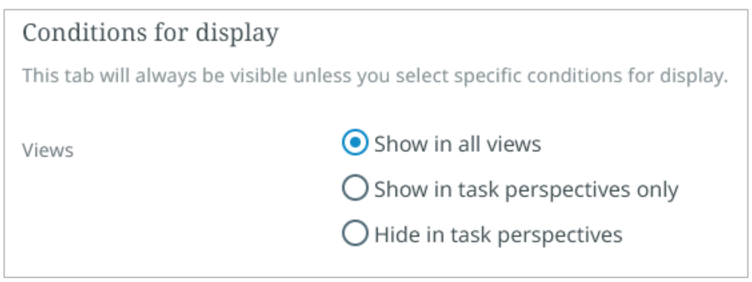
To configure a tab, use the settings described below.

"Conditions for display" Parameters

The admin user can set conditions for tab display using the options found under the "Conditions for display" section. Conditions for display can be combined and include: Views, User groups, Object type, Workflow, and Workflow State. These parameters are listed and described below.



1. **Views**. The "Views" parameter presents three radio buttons that, when set, determine which perspectives the tab will display in. This setting can help avoid cluttered interfaces by limiting the display of tabs to just those relevant to the user / user group.



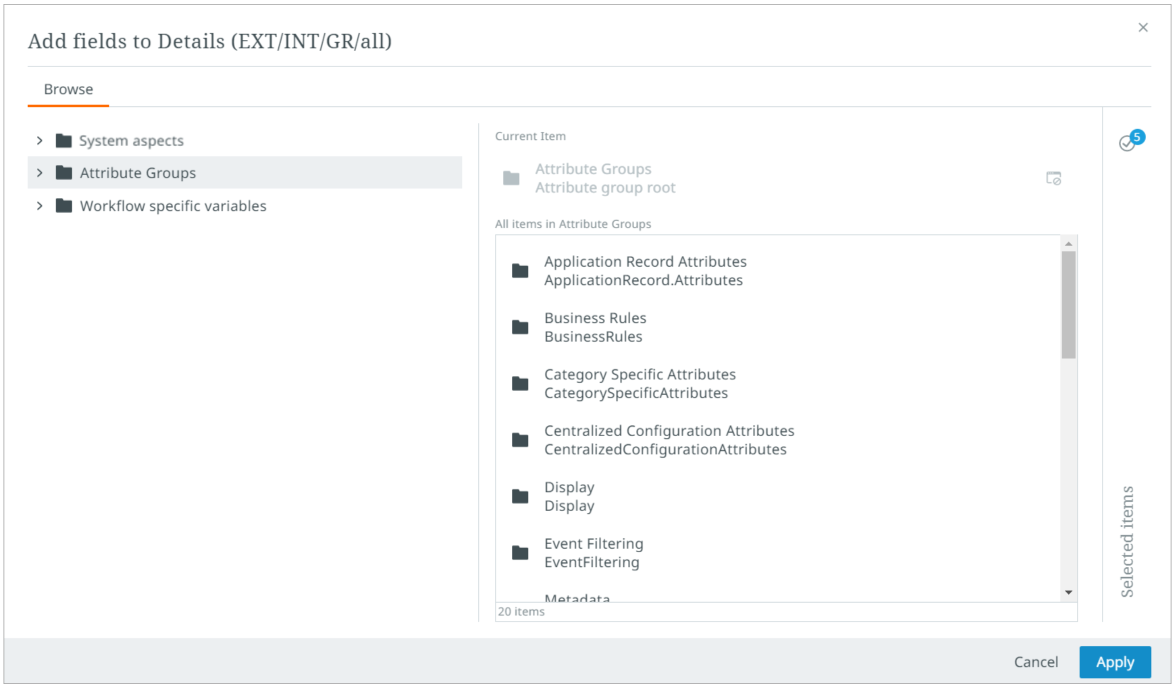
- "Show in all views" -- The tab will display in all perspectives: Browse, Tasks, Collections, as well as in the search screen
- "Show in task perspectives only" -- The tab will only display in Tasks perspectives
- "Hide in task perspectives" -- The tab will not display in any Tasks perspectives

2. **User groups**. Allows the admin user to select specific user groups to access the tab. When user groups are selected, the tab is only displayed for the specified groups. If no user groups are selected, all user groups will have access to the tab. Normal privilege rules (maintained in the workbench) are still respected.
3. **Object type**. Select one or more object types in this parameter to trigger display of the tab when one of the configured object types is being viewed.
4. **Workflow**. By selecting a workflow, the tab will only display when objects in that workflow are being viewed.
5. **Workflow state**. By selecting a specific workflow state, the tab will only display when an object in the specific workflow state is being viewed.

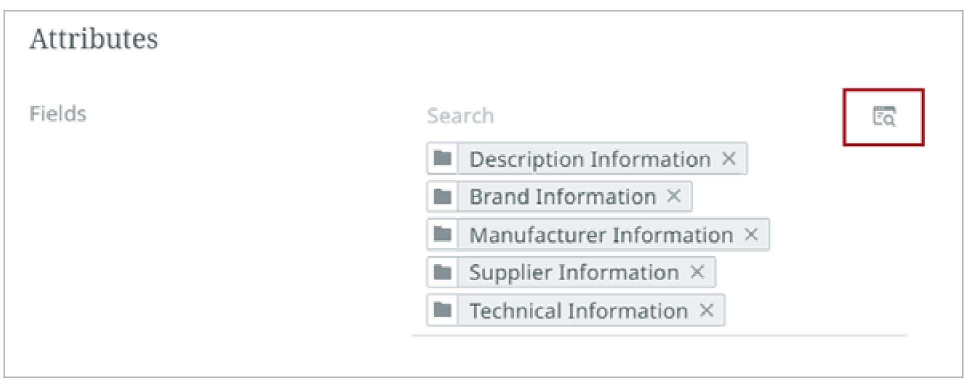
Setting Attributes for Display

The user can customize the new tab by selecting which attributes, attribute groups, and workflow variables display on the tab. If reference types are included in the selected attribute groups, those reference types can be selected and added for display on the attribute tab.

The "Attribute groups" component allows admin users to select which attribute or reference fields should display in the tab. The search option utilizes a typeahead component with an option to open the Item Picker.



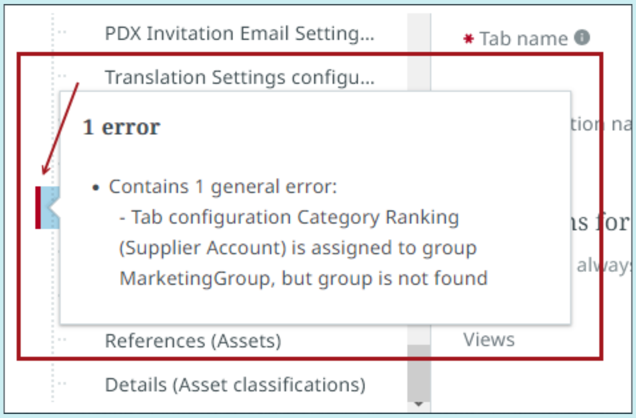
- To use typeahead, type the attribute name and select it.
- To use the Item Picker, select the Item Picker icon in the typeahead search bar.



The Item picker allows the administrator to select attributes, system aspects, workflow aspects, workflow variables, and Reference or Link types for a Tasks perspective table. Attributes, Attribute groups, and workflow variables are displayed in a dual list within the attribute tab's edit page.

When the tab is configured as desired, click "Save" to keep all changes made to the tab configuration.

Note: If a work area, perspective, view, or tab is misconfigured, a red-line error indicator will display to the left of the affected configuration element. Hovering the cursor over the red line prompts an informational pop-up to display. The pop-up describes the issue causing the configured element to be misconfigured, (as shown in the screenshot below), giving the user the information needed to make the appropriate change.



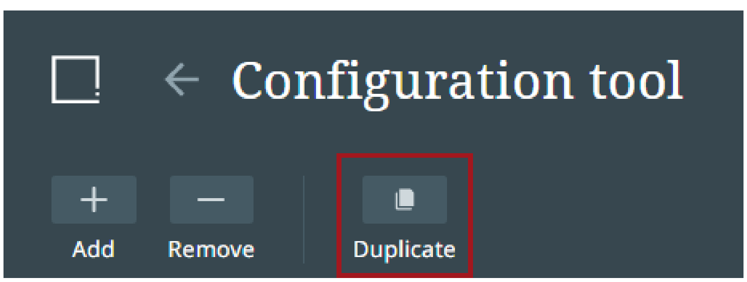
Until the configuration is corrected, the 'Save' and 'Duplicate' buttons will be inoperative.

Sequencing Tabs

Click "All tabs" to view all existing tabs. Tabs can be reordered by clicking and dragging the order displayed in the "Available tabs" display.

Duplicating a Tab

Admin users can duplicate a tab. The selected tab page configuration will be duplicated into the new duplicated configuration.



To duplicate a **tab**:

1. Select a tab page configuration in the tree on the left by clicking it.
2. Click “Duplicate” in the toolbar and the tab will duplicate along with the configuration settings.
3. Click “Save” to save changes.

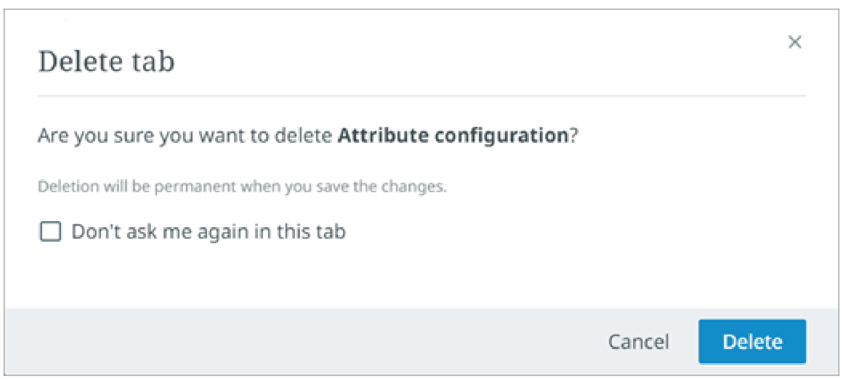
Tab Type-Specific Configuration Options

- **Attribute tab**: The Attribute tab displays attributes and workflow variables. Admin users can specify which attributes, attribute groups, and workflow variables should be used in the tab.
- **Asset tab**: The Asset tab displays asset values within the details view of the preset work areas and perspectives.
- **Reference tab**: The Reference tab displays a details pane that features a list of valid reference types in a References column and a tabular view of the references for the selected reference type.
- **Language tab**: The Language tab allows admin users to configure preset attributes that are language dependent. Admin users can specify which attribute groups should be used in the tab.
- **Packaging tab**: The Packaging tab displays any packaging hierarchies the currently selected object resides in.

Removing a Tab

To remove a tab:

1. Click the tab in the tree on the left to select it.
2. Next, click the "-" button in the toolbar. The "Delete Tab" dialog will display. Click delete to close the dialog. The dialog has an optional selection box that states "Don't ask me again in this tab." When this box is checked, the "Delete tab" warning dialog will not display again, and the remove button will immediately delete the selected tab when the "-" button is selected.



3. Click "Save" to save changes made to the tab. Deletion of a tab will be permanent upon saving the changes.

For information on configuring a Compare tab to easily compare golden, external, and internal records for products, review the Configuring the Compare tab topic in the Central Configuration documentation.

Configuration Tool Actions

The Configuration tool actions allow admin users to create preset actions that are triggered by user actions. The action options are described below.

Object Creation Configuration Action

The object creation configuration action allows a user to create a new object and immediately initiate the new object into a defined workflow. This action is triggered in the following ways:

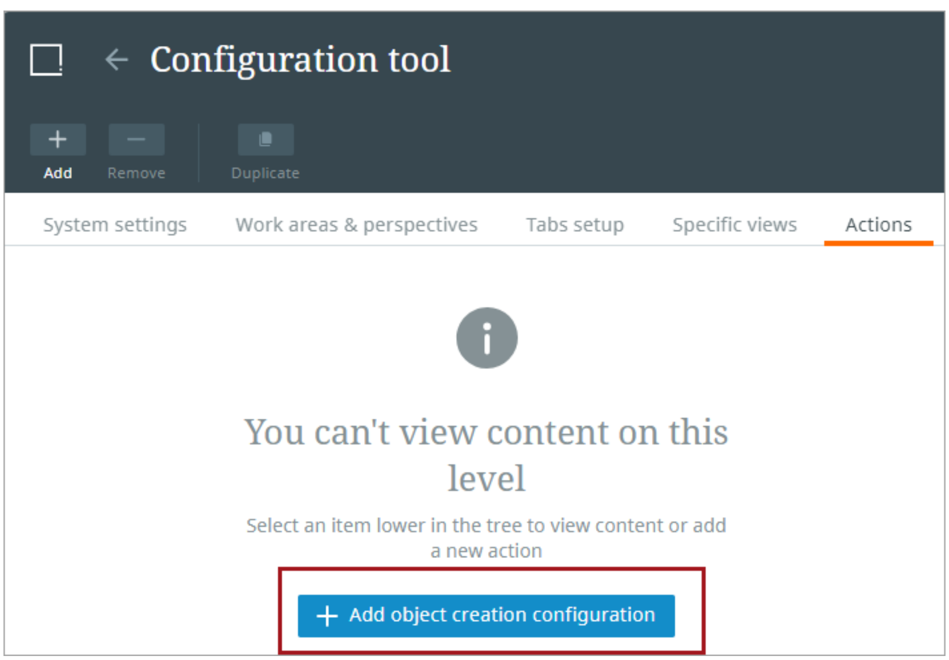
- In a Task perspective, object creation and initiation are triggered by clicking the 'Create' toolbar action. For additional information, refer to the Creating and Initiating a New Object within the Task Perspective topic.
- In a Browse perspective, object creation and initiation are triggered by right-clicking the 'Create' action. For additional information, refer to the Creating New Objects Within the Browse Perspective topic.

Creating an Object Creation Configuration Action

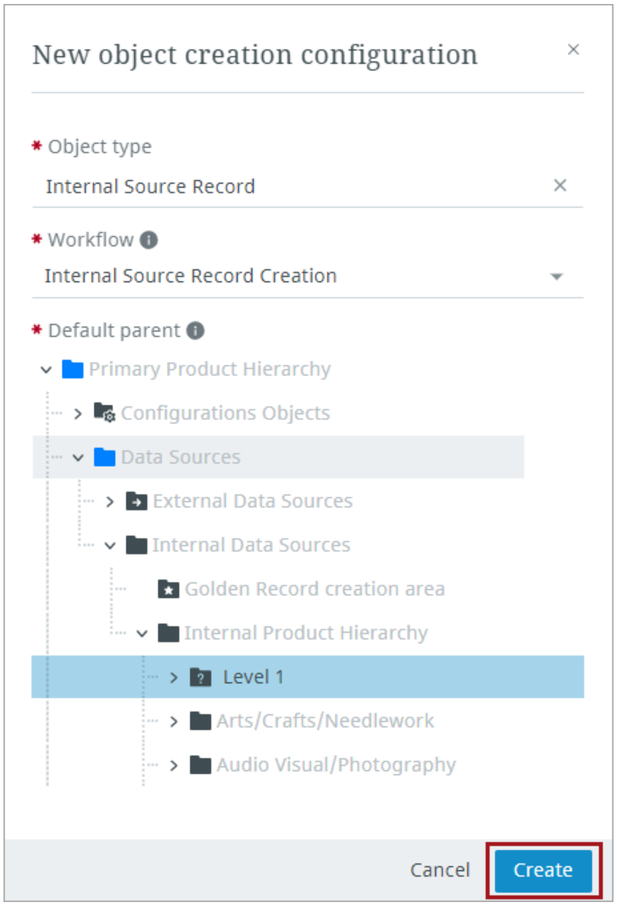
1. Add a new configuration.

    - Click the **Add** toolbar button.

    - Click the **Add object creation configuration** button.



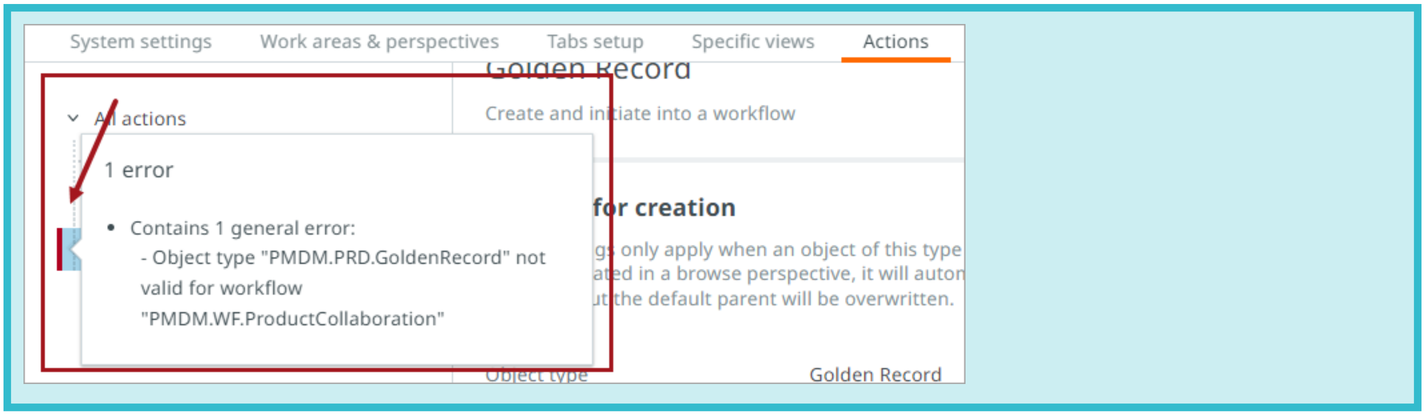
2. Enter an **object type**, a **workflow**, select the **default parent node**, and click the **Create** button.



> **Note:** The default parent settings apply when an object of this type is created in a Tasks perspective. If the object is created in a Browse perspective, it will automatically be initiated into the selected workflow, but the default parent will be overwritten with the location the object was added.
>
> The default parent node value is stored in the 'Parent' field. This value can be updated later in a perspective table or using the Attribute tab of the details view. For more information on adding the 'Parent' field to these locations, refer to the **Creating a Browse Table Configuration in Specific Views** section of the Creating a Browse Perspective topic, the **Creating and Maintaining Tasks Perspectives** section of the Configuration Tool: Creating Perspectives and Work Areas topic, and the **Setting Attributes for Display** section in the Configuration Tool Tabs Setup topic.

3. Click the **Save** button in the toolbar.

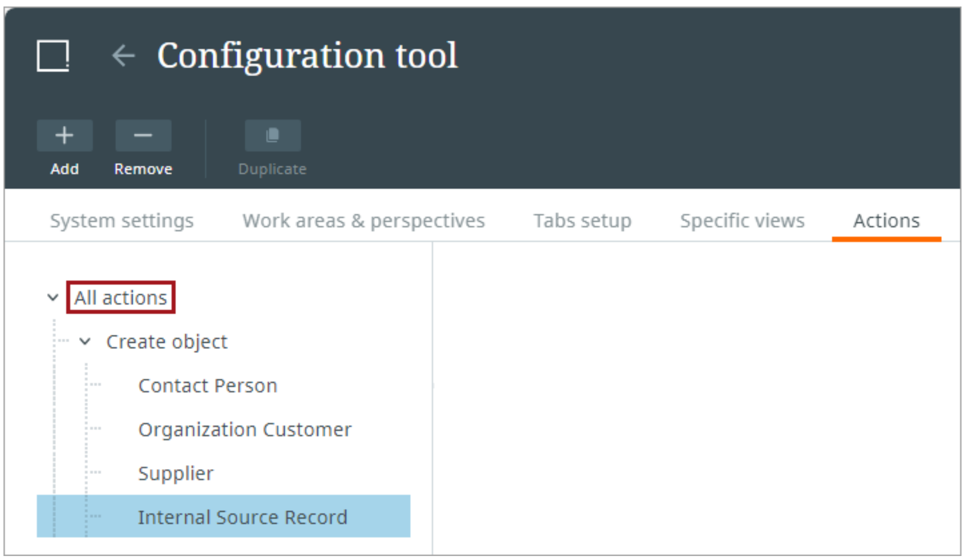
> **Note:** Changes made to the properties of the actions may result in the action configuration to become invalid. If this happens, a red-line error indicator will display to the left of the affected configuration element. Hovering the cursor over the red line prompts an information pop-up to display. The pop-up describes the issue causing the configured element to be misconfigured, (as shown in the screenshot below), giving the user the information needed to make the appropriate change.



Updating Configuration Tool Actions

Actions can be viewed and updated by an admin user after the initial creation of the action.

1. Select the action from the actions list menu.

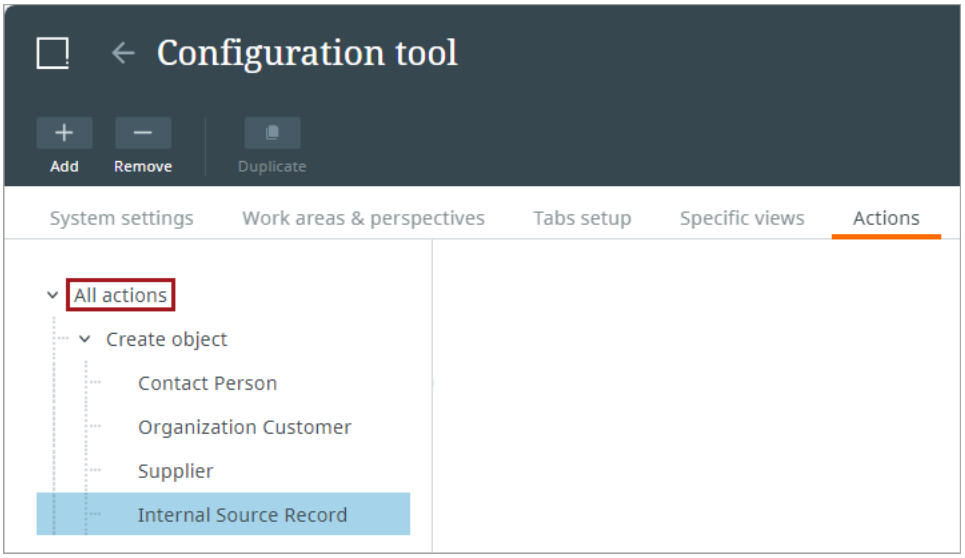


2. After making any changes, click the **Save** button on the top right of the page.

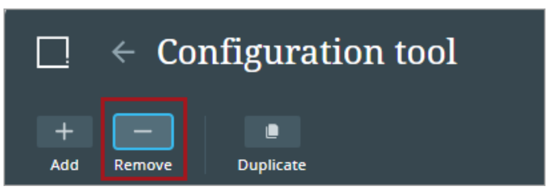
Removing Configuration Tool Actions

Actions can be removed by an admin user.

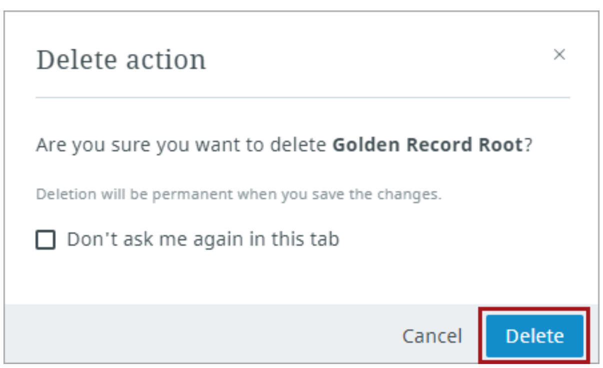
1. Select the action from the actions list menu.



2. Click the **Remove** toolbar button.



3. Click the **Delete** button in the dialogue to confirm removal. If desired, check the box for **Don't ask me again in this tab for automatic removal** for any future removal requests.



4. Click the **Save** button on the top right of the page.

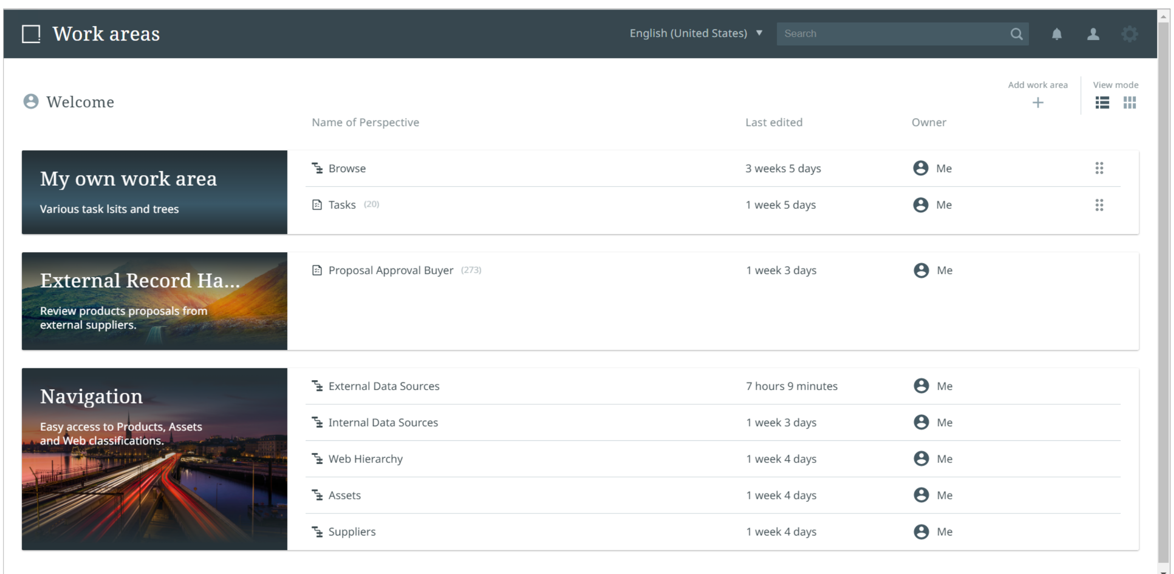
Preset Work Areas and Perspectives

The administrator can create custom, non-editable perspectives and work areas for user groups that will streamline dashboard assignments that have been configured to align with the customer's specific business requirements. Once created, these preset perspectives and work areas cannot be edited or deleted by users, and will display by default; this is to ensure that users are engaging with tasks in the way the admin configured. To use this feature, contact Stibo Systems.

Creating Preset Work Areas and Perspectives for Users

When creating a work area for users, you must be logged in to an admin account. Once logged in, refer to Configuration tool: Creating perspectives and work areas for instructions. After the work area have been set as default, user groups will be able to use them immediately.

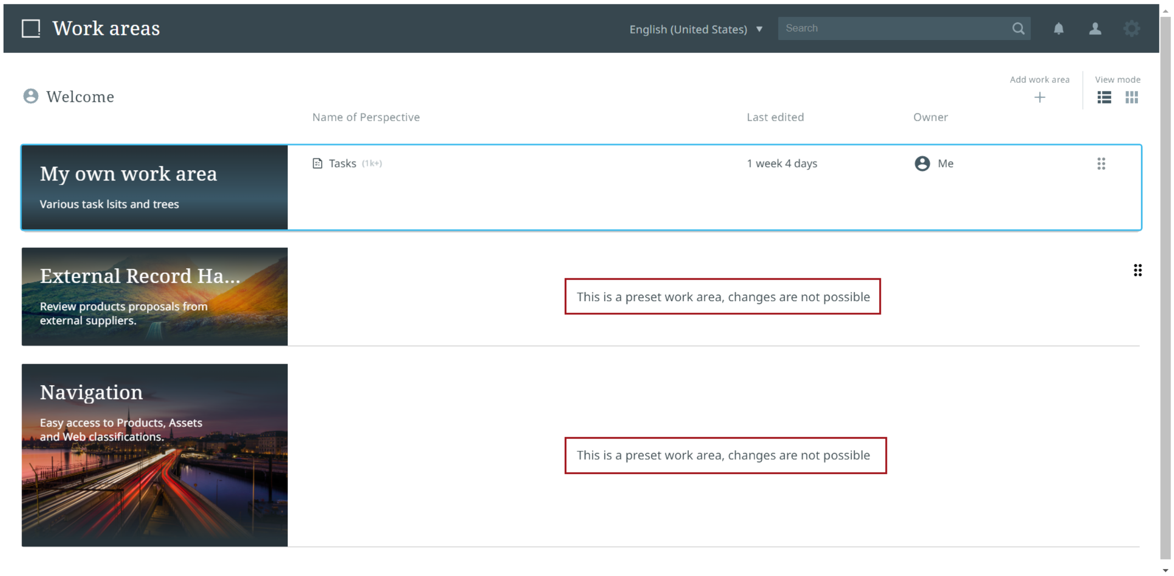
To create default perspectives, you must be logged in to your admin account. Once logged in, refer to Configuration tool: Creating perspectives and work areas for instructions. Admin will need to add standard perspectives to the work area, and after work areas have been set to default, the perspectives will be default as well. Dashboard views for users will look the same, but editing and ordering work areas and perspectives will be limited.



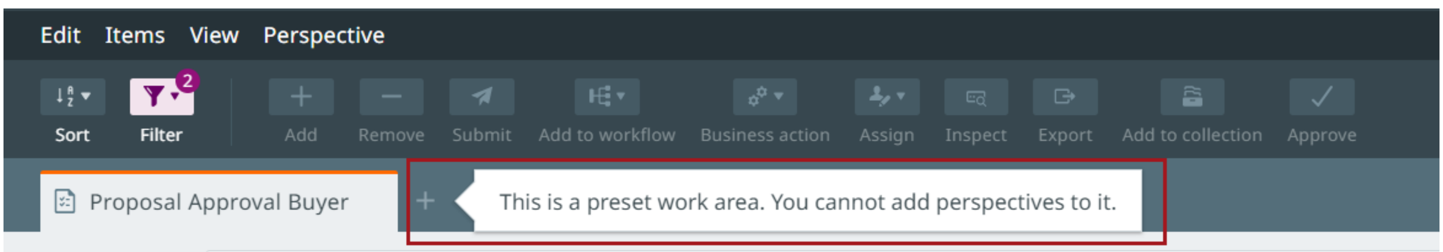
User Permissions for Preset Work Areas and Perspectives

Admin and users cannot modify or move preset work areas. The "Edit" and "Delete" options are disabled. Only admin users can change work area settings such as "Rename," "Duplicate," "Move to," "Reset to default," and "Delete."

Users cannot move perspectives once they have been set by admin permissions.



In a perspective, when a user hovers their cursor over the edit menu options, a message displays stating that the perspectives belong to the preset work areas and cannot be altered, nor new perspectives be added.



Users can add columns and adjust column width in preset perspective tables. Changes made by the individual user to default perspective tables such as columns, width, filters, and sort options, display only for that user, and are saved for future work sessions. Users can also choose to reset their adjusted tables back to default configurations by clicking the "Reset to default" option.

Creating Default Collection Perspective Columns

After completing a search for products within Instrument, users can add the selected products to a Collection Perspective. The attributes that are configured to show on the card view are the same attributes that will be displayed as columns in the newly created perspective.

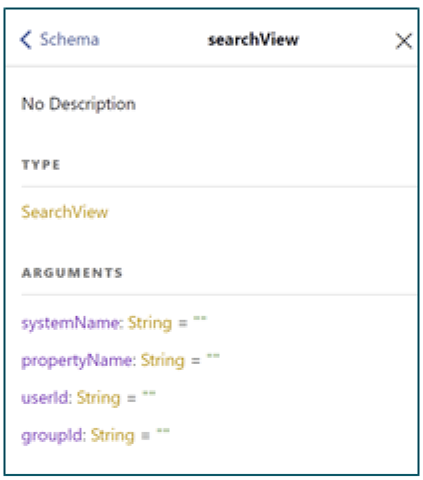
Finding Internal Endpoint Schema

GraphQL queries have been created to retrieve search attribute configuration settings and to update attribute configuration settings. To run these queries from your local STEP environment, refer to the below:

1. Open the local GraphiQL editor by navigating to your local STEP server: https://[servername]/graphqlv2
2. Enter login credentials (requires admin access)

To find the relevant query for your task, the GraphQL schema definition is available to browse.

1. Find the schema definition in the Documentation Explorer on the top right side of the screen
2. Search for the query SearchView in the "Docs" menu:



Query searchView

The searchView query is used to view the current default settings for which attributes are visible in the card view. These properties can be queried for individual users or for the default for all users.

> **Note:** Removing the userId property will return the default settings for all users.

Definition

query.searchView

TYPE

SearchView

ARGUMENTS

systemName: String = ""

propertyName: String = ""

userId: String = ""

groupId: String = ""

TYPE

[ViewConfigEntry]

FIELDS

featureID: String

featureType: String

fieldIDs: [String]

entryForNode: Boolean

Input Example

```
 query searchView {
searchView(userId: "USER") {
  viewConfigEntries {
    featureID
    fieldIDs
    featureType
  }
```

```
    }
}
```

Response Example


```
{
  "data": {
    "searchView": {
      "viewConfigEntries": [
        {
          "featureID": "product",
          "fieldIDs": [
            "id",
            "name",
            "objectType",
            "values. NumberWithUnits",
            "values.test_date",
            "values.test_date_multivalue"
          ],
          "featureType": "SUPERTYPE",
          "entryForNode": null
        }
      ]
    }
  }
}
```


Mutation updateSearchView

The updateSearchView query is used to mutate the saved view configuration and update the visible fields either by default for all users, per userID, or by userGroup.

The node fields listed below are defined in the Data specifications section / step for the Elasticsearch Configuration, and they can be added to the search view. Some are displayed on the search cards by default and will not be duplicated with the attribute view, even if they are added to the configuration.

- *ID* – fieldID: "id"
- *Name* – fieldID: N/A

- *Path* – fieldID: N/A
- *Object Type* – fieldID: N/A
- *Creation Date* – fieldID: "dateOfCreation"
- *Last Revision Date* – fieldID: "lastUpdated"
- *Approval Status* – fieldID: "approvalStatus"
- *Reference attributes* and *attributes of child nodes* can also have values displayed on search cards. Examples for how to configure their identifiers are below:
  - *reference target attribute* – values.{referenceType}|target|{attributeId}
  - *reference source attribute* – values.{referenceType}|source|{attributeId}
  - *reference meta attribute* – values.{referenceType}|target|{attributeId}
  - *child item attribute* – values.child|{attributeId}

Definition

Mutation.updateSearchView

Arguments:

FIELDS

systemName: String

propertyName: String

userId: String

groupId: String

viewConfigEntries: [ViewConfigEntryInput]!

Input Example

```
 mutation updateSearchView {
updateSearchView(input: {
 userId: "USER",
```

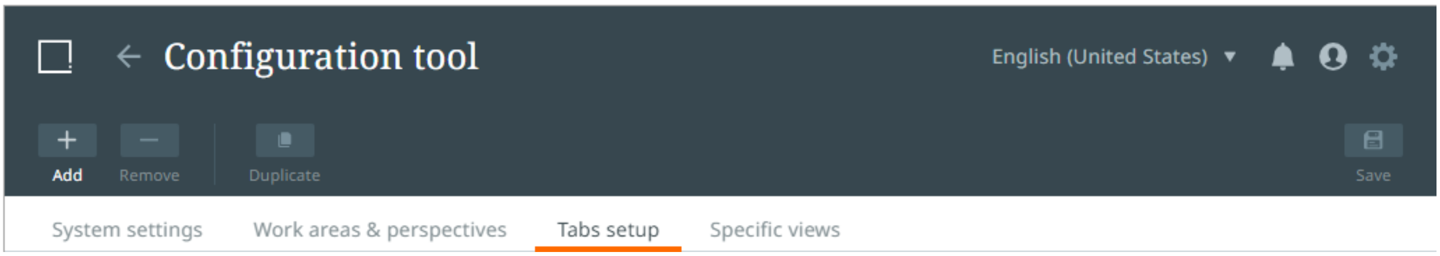
```
    viewConfigEntries:
    [{featureType: "SUPERTYPE", featureID: "product", fieldIDs: ["id","approvalStatus",
"values.DescriptionShort", "values.RecommendedProducts|target|CountryOfOrigin"]}]
  })
    {
       success
    }
}
```

Response Example

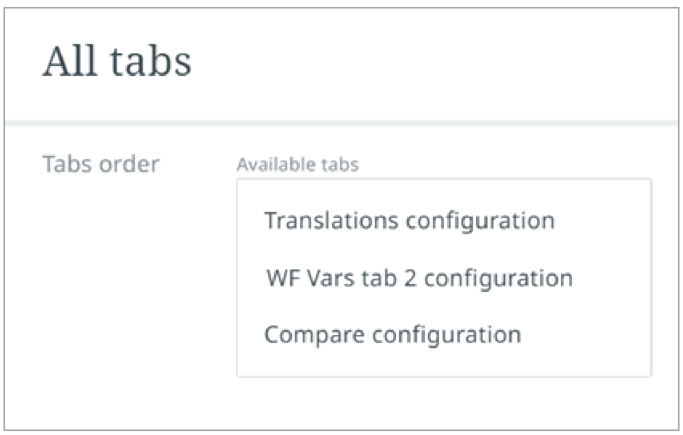
```
{
  "data": {
    "updateSearchView": {
      "success": true
    }
  }
}
```

Configuration Tool Tabs Setup

The Configuration tool's "Tabs setup" functionality allows admin users to configure preset tabs for the details view. To access the "Tabs setup" page, click on the Configuration tool icon in the upper-right hand corner of the screen. From the configuration tool home page, click on the "Tabs setup" option.



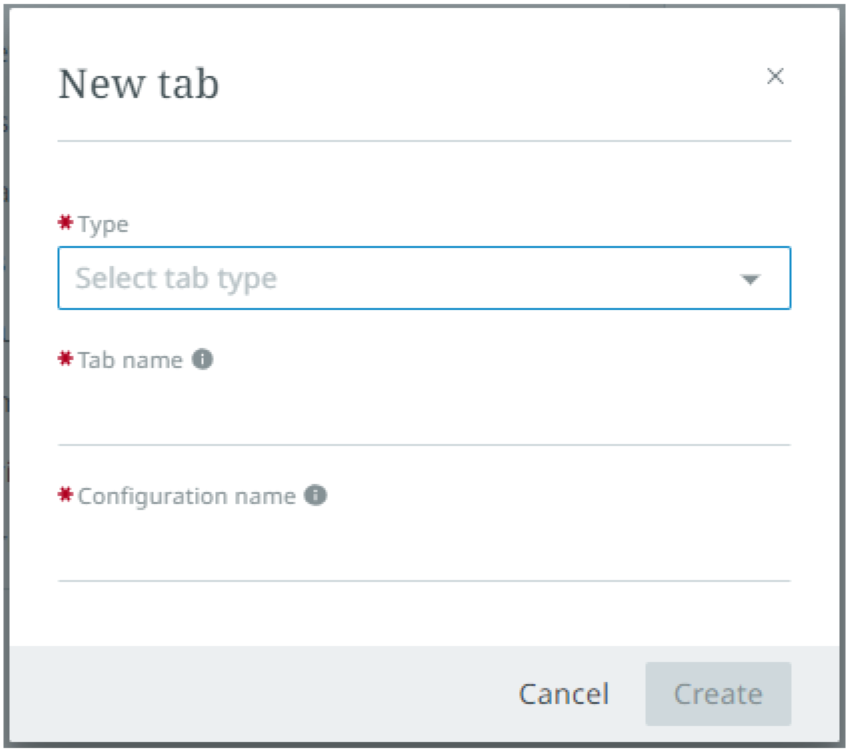
The "Tabs setup" page will display all created tabs. Configured tabs will be listed on the left side of the page. Select a tab to view details.



Adding a Tab

To add a tab:

1. Click the "+" button in the toolbar. The "New tab" dialog will display.



2. Select the type of tab to create: "Attribute tab page," "Asset tab page," "Reference tab page," "Packaging tab page," or "Language tab page."
3. Provide a name for the "Tab name" field. A value will auto-populate for the "Configuration name" field derived from the value provided for the "Tab name" field. Users can revise this value as needed.

> **Note:** The Configuration name is only displayed for admin users and only displays in the Configuration tool. End users cannot view the Configuration name.

4. Click "Create" to create a tab. The new tab will display in the tree on the left side of the screen.

Configuring the Tab

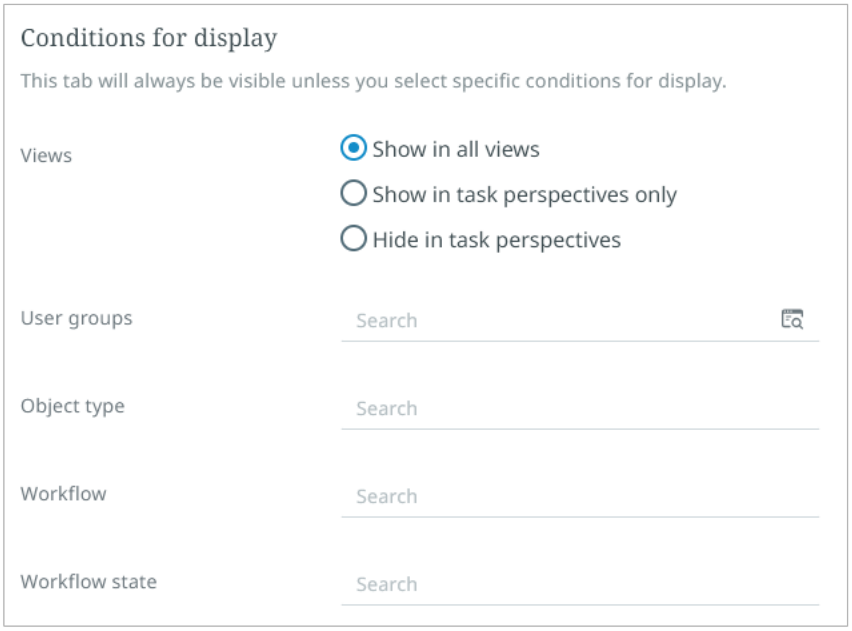
The options available to configure a tab enable the Instrument UI admin to determine:

- when the tab displays
- for whom the tab displays
- the data the tab displays

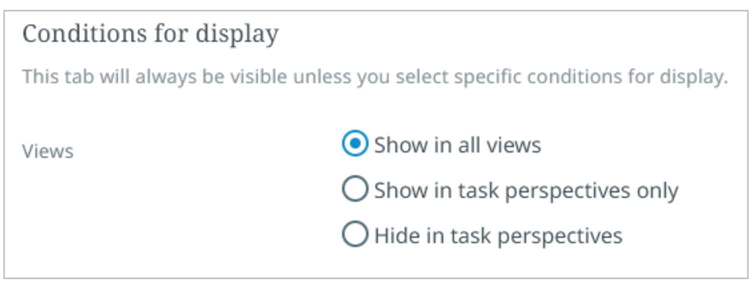
To configure a tab, use the settings described below.

"Conditions for display" Parameters

The admin user can set conditions for tab display using the options found under the "Conditions for display" section. Conditions for display can be combined and include: Views, User groups, Object type, Workflow, and Workflow State. These parameters are listed and described below.



1. **Views**. The "Views" parameter presents three radio buttons that, when set, determine which perspectives the tab will display in. This setting can help avoid cluttered interfaces by limiting the display of tabs to just those relevant to the user / user group.



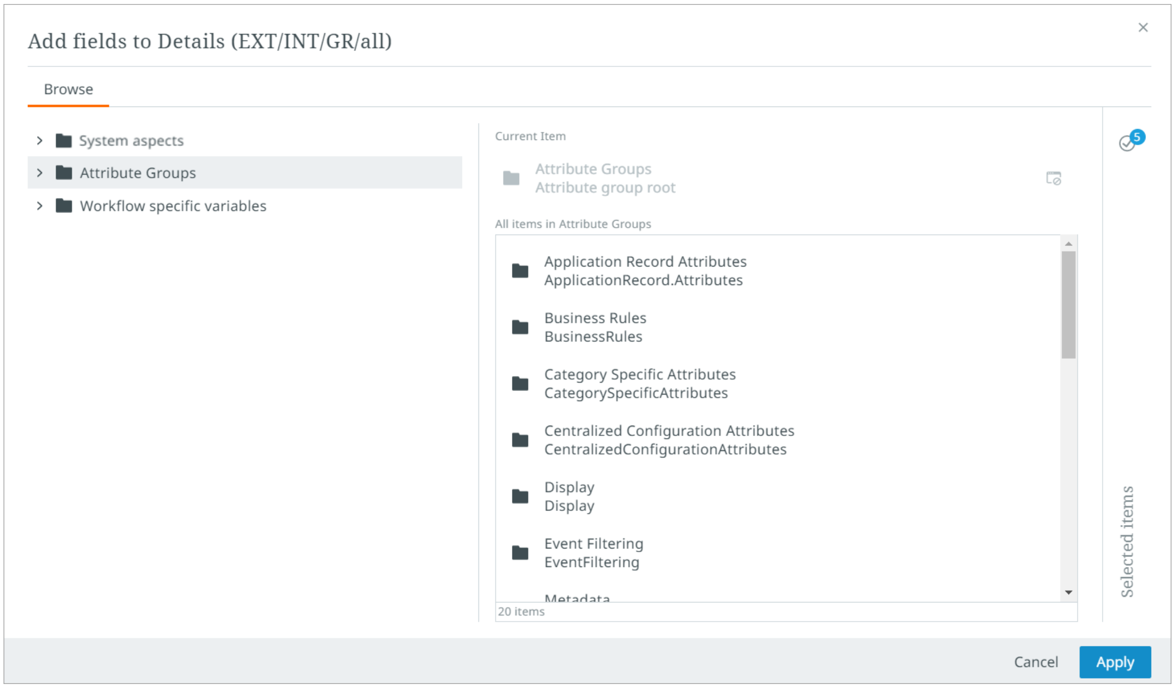
- "Show in all views" -- The tab will display in all perspectives: Browse, Tasks, Collections, as well as in the search screen
- "Show in task perspectives only" -- The tab will only display in Tasks perspectives
- "Hide in task perspectives" -- The tab will not display in any Tasks perspectives

2. **User groups**. Allows the admin user to select specific user groups to access the tab. When user groups are selected, the tab is only displayed for the specified groups. If no user groups are selected, all user groups will have access to the tab. Normal privilege rules (maintained in the workbench) are still respected.
3. **Object type**. Select one or more object types in this parameter to trigger display of the tab when one of the configured object types is being viewed.
4. **Workflow**. By selecting a workflow, the tab will only display when objects in that workflow are being viewed.
5. **Workflow state**. By selecting a specific workflow state, the tab will only display when an object in the specific workflow state is being viewed.

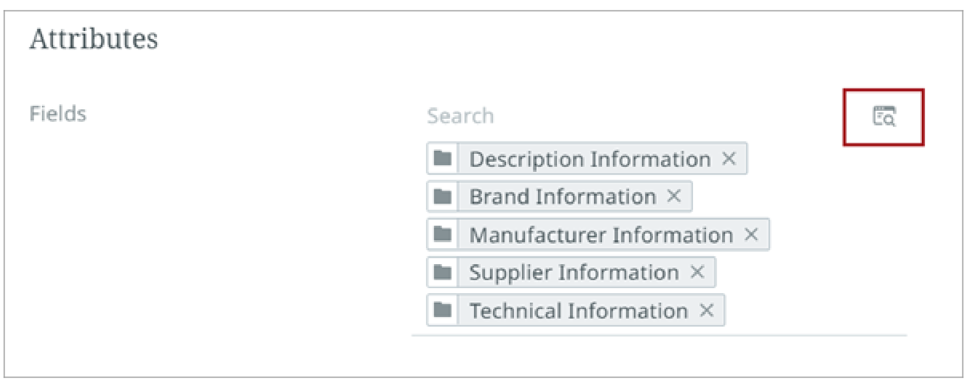
Setting Attributes for Display

The user can customize the new tab by selecting which attributes, attribute groups, and workflow variables display on the tab. If reference types are included in the selected attribute groups, those reference types can be selected and added for display on the attribute tab.

The "Attribute groups" component allows admin users to select which attribute or reference fields should display in the tab. The search option utilizes a typeahead component with an option to open the Item Picker.



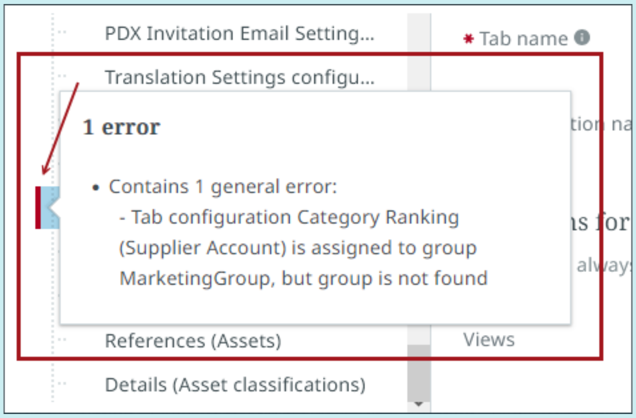
- To use typeahead, type the attribute name and select it.
- To use the Item Picker, select the Item Picker icon in the typeahead search bar.



The Item picker allows the administrator to select attributes, system aspects, workflow aspects, workflow variables, and Reference or Link types for a Tasks perspective table. Attributes, Attribute groups, and workflow variables are displayed in a dual list within the attribute tab's edit page.

When the tab is configured as desired, click "Save" to keep all changes made to the tab configuration.

Note: If a work area, perspective, view, or tab is misconfigured, a red-line error indicator will display to the left of the affected configuration element. Hovering the cursor over the red line prompts an informational pop-up to display. The pop-up describes the issue causing the configured element to be misconfigured, (as shown in the screenshot below), giving the user the information needed to make the appropriate change.



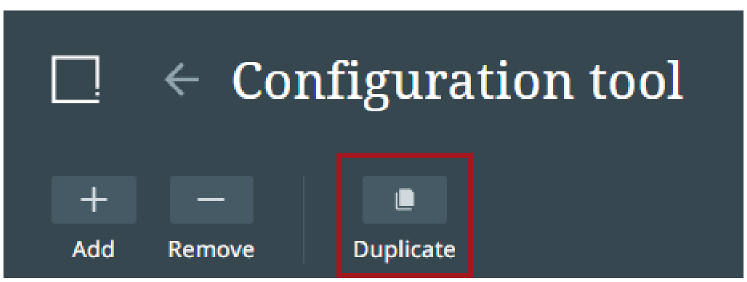
Until the configuration is corrected, the 'Save' and 'Duplicate' buttons will be inoperative.

Sequencing Tabs

Click "All tabs" to view all existing tabs. Tabs can be reordered by clicking and dragging the order displayed in the "Available tabs" display.

Duplicating a Tab

Admin users can duplicate a tab. The selected tab page configuration will be duplicated into the new duplicated configuration.



To duplicate a **tab**:

1. Select a tab page configuration in the tree on the left by clicking it.
2. Click “Duplicate” in the toolbar and the tab will duplicate along with the configuration settings.
3. Click “Save” to save changes.

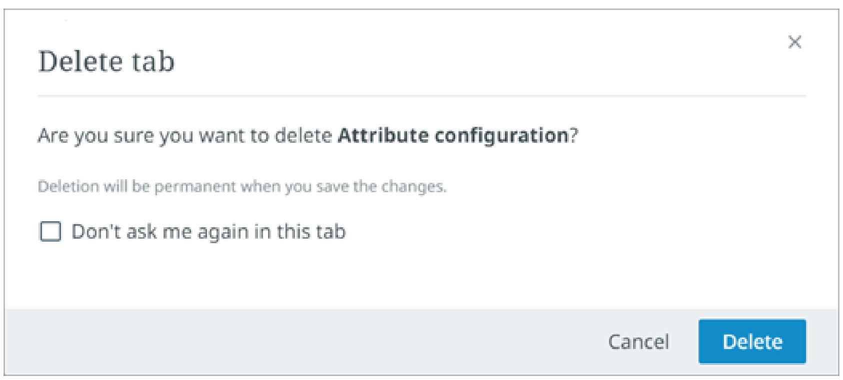
Tab Type-Specific Configuration Options

- **Attribute tab**: The Attribute tab displays attributes and workflow variables. Admin users can specify which attributes, attribute groups, and workflow variables should be used in the tab.
- **Asset tab**: The Asset tab displays asset values within the details view of the preset work areas and perspectives.
- **Reference tab**: The Reference tab displays a details pane that features a list of valid reference types in a References column and a tabular view of the references for the selected reference type.
- **Language tab**: The Language tab allows admin users to configure preset attributes that are language dependent. Admin users can specify which attribute groups should be used in the tab.
- **Packaging tab**: The Packaging tab displays any packaging hierarchies the currently selected object resides in.

Removing a Tab

To remove a tab:

1. Click the tab in the tree on the left to select it.
2. Next, click the "-" button in the toolbar. The "Delete Tab" dialog will display. Click delete to close the dialog. The dialog has an optional selection box that states "Don't ask me again in this tab." When this box is checked, the "Delete tab" warning dialog will not display again, and the remove button will immediately delete the selected tab when the "-" button is selected.



3. Click "Save" to save changes made to the tab. Deletion of a tab will be permanent upon saving the changes.

For information on configuring a Compare tab to easily compare golden, external, and internal records for products, review the Configuring the Compare tab topic in the Central Configuration documentation.

Setting Business Action Availability

The administrator can decide which business actions their users can access in Instrument. Without setting up user access to business actions (as described in this topic), no actions will be available when users click on the Business action button.

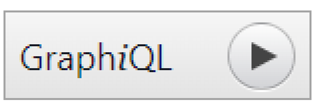
Reading a New System Setup Group

Follow the steps below to designate a specific System Setup group that holds the business actions to be utilized by Instrument users:

1. Open the local GraphiQL editor by navigating to your local STEP server: https://[servername]/graphqlv2.
2. Enter login credentials (requires admin access).
3. Paste the code pictured below into the left-side panel. (Also, be sure to remove the text "InstrumentActions" and replace it with the system setup group ID for your desired business action group.) For example:

```
mutation writeConfig {
  updateBusinessActionsConfig(input: {businessActionsGroupId: "InstrumentActions"}) {
    success
    errors {
      message
    }
  }
}
```

4. Click the play button (circle with an arrow) in the top left corner of the screen;



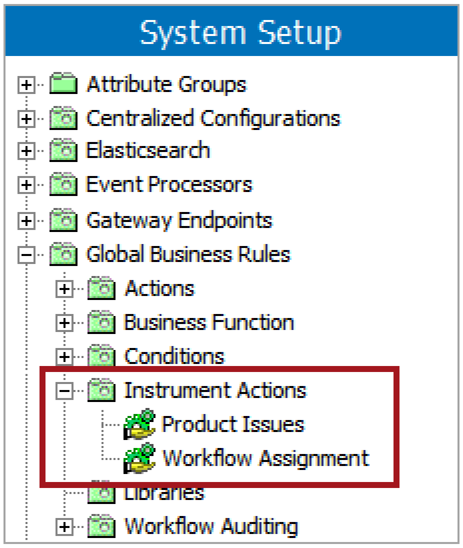
If your setup is a success, then this code is displayed on the right-hand panel:

```
{
  "data": {
    "updateBusinessActionsConfig": {
      "success": true,
      "errors": []
    }
  }
```

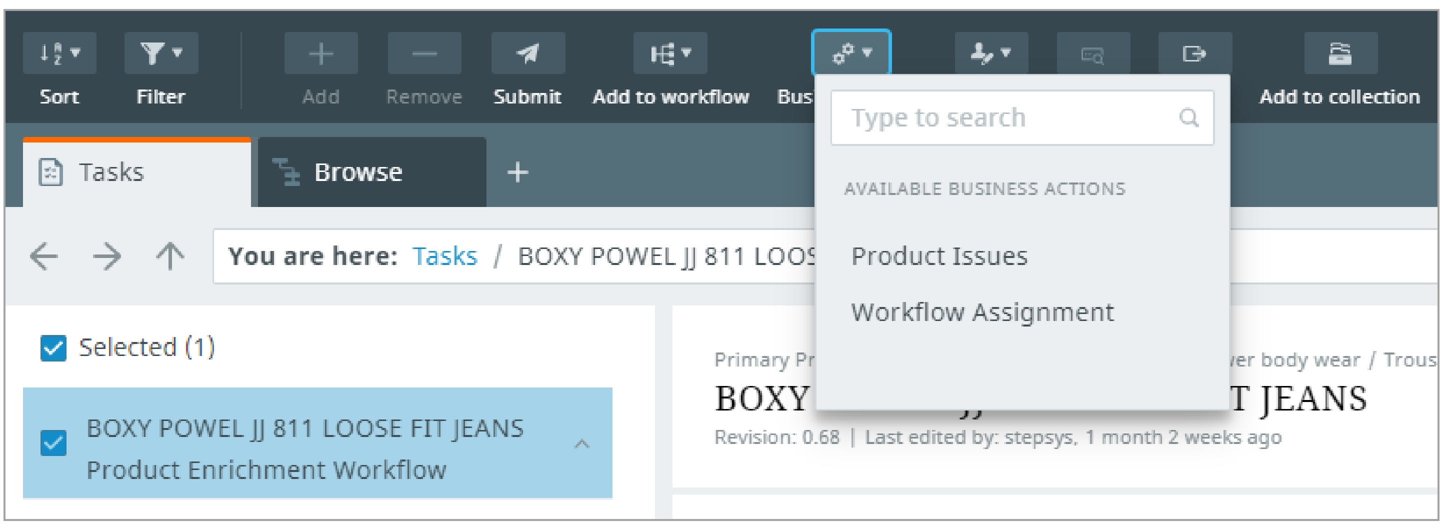
```
}
```

Now, when a user clicks on Business action on the Instrument toolbar, the business actions configured under that group will be available.

STEP Workbench:



Instrument:



When reviewing the business action hierarchy in the workbench, it is useful for admin users to know that any business actions contained in sub-folders beneath the folder specified as the `businessActionsGroupId` will also be displayed in the Business action button drop-down.

Setting Default Asset Upload Classification

A default classification folder with the ID of "IllustrationRoot" is used to store all image files used as background images for work areas. The administrator can elect to use a different folder for these image assets using the method described below.

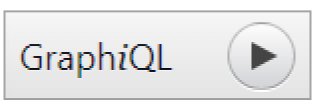
Setting a New Asset Upload Classification

Follow these steps to designate a specific classification folder to use for storing work area background image assets:

1. Open the local GraphiQL editor by navigating to your local STEP server: https://[servername]/graphqlv2.
2. Enter login credentials (requires admin access).
3. Paste the code pictured below into the left-side panel. (Also, be sure to remove the text "InstrumentAssets" and replace it with the classification folder ID for your desired asset upload classification.) For example:

```
mutation setAssetUpload {
  updateAssetUpload(
    input: { assetClassification: { id: "InstrumentAssets", type: "Folder" } }
  ) {
    success
  }
}
```

Click the play button (circle with an arrow) in the top-left corner of the screen.



If your setup is successful, this code is displayed on the right-hand panel:

```
{
  "data": {
    "updateAssetUpload": {
      "success": true
    }
  }
}
```

Create Toolbar Button Setup

The 'Create' button is a button located within the toolbar of a Tasks perspective that allows a user to create a new object and initiate that object into the initial state of a workflow. For more information on how to use the 'Create' button, review the Creating and Initiating a New Object within the Tasks Perspective topic. Before the 'Create' button can be utilized, a series of configurations need to be completed.

Prerequisites

- The object type being used for the new object(s) must be created within STEP Workbench with an autogenerated ID. For more information on how to create an object type, refer to the Creating an Object Type topic in the System Setup documentation.
- A workflow is required for initiating the newly added object. For additional information on creating a workflow, refer to the Creating a Workflow topic in the System Setup documentation.

  It is important that the workflow:

  - Is not configured with business rules that require data on incoming objects before being accepted by the workflow.
  - Uses an Initial state that is not part of a cluster or parallel initial state.
- In Instrument, an 'Add object creation configuration' action must be configured in the Configuration Tool for the intended object type of the new object(s). This configuration will define a workflow and a default parent node. Refer to the Configuration Tool Actions topic for additional information.
- Users utilizing the 'Create' button must belong to a User Group that has 'Create product', 'Create entity', or 'Create classification' permissions defined for object types in the STEP Workbench. Refer to the Adding Setup Privileges for a Group topic in the System Setup documentation.