EXCEL SMARTSHEET
SETUP AND USER GUIDE

StiboSystems

STEP Trailblazer

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About Smartsheets

The Smartsheet component can be used to download product data from a Supplier portal to an interactive Smartsheet in Excel. The downloaded data can be maintained or new product data can be created. When the desired changes have been made, the data can be automatically validated in Excel, and the Excel file can then be uploaded to the Supplier portal. The Smartsheet component can also be used to initiate new products using a predefined template in Excel to set up the products.

The export configurations are specified in the Export Manager, then associated with the relevant template widgets and export actions in the Supplier portal. From the Supplier portal, product data or templates can also be downloaded.

Important: Though still available, the Quicksheet concept has been deprecated. The use of Smartsheets is recommended.

License Requirements

To be able to use the Smartsheet component, the following components are required in addition to the Step Information Server.

- Smartsheet component
- Supplier Portal component

Other licenses may be required for specific features.

Important: Smartsheets are designed to be used from the Supplier Portal ONLY and using them out of this context will diminish their capabilities. Furthermore, future Smartsheet enhancements will most likely also depend on the Portal. Specifically, objects should NOT be exported to Excel Smartsheets from the STEP Workbench. Smartsheet templates exported from STEP Workbench will not be able to correct supplier linking of products created during import and will also provide different browsing capabilities. A Maintenance Smartsheet exported from the STEP Workbench will not contain any information about workflow and state, so it will not be able to supply information about workflow mandatory columns. In addition, any business rules regarding the current workflow will be unavailable during import. It will also supply a different set of possible targets when maintaining product cross-references.

Creating Smartsheet Data and Template Configurations in the Export Manager

Smartsheet export configurations are specified in the Export Manager and associated with the relevant template widgets and export actions in the Supplier portal. From the Export Manager, data can either be exported to a Smartsheet or a template can be exported to use for creating new products.

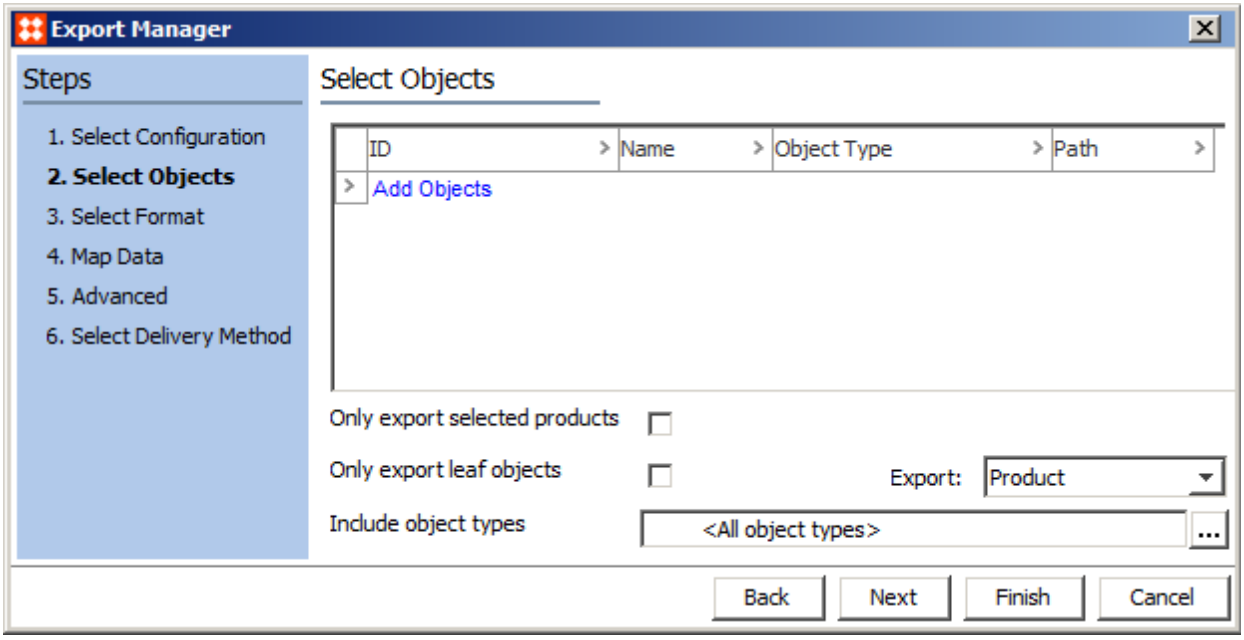
To specify the configurations, go through all the steps of the Export Manager wizard. The following section, however, only describes the settings that are specific to Smartsheets.

For detailed information about the Export Manager Wizard, see the Exporting Data and Images documentation.

Important: Smartsheets are designed to be used from the Supplier Web UI ONLY and using them out of this context will diminish their capabilities. Furthermore, future Smartsheet enhancements will most likely also depend on the Web UI. Specifically, objects should NOT be exported to Excel Smartsheets from the STEP Workbench. Smartsheet templates exported from STEP Workbench will not be able to correct supplier linking of products created during import and will also provide different browsing capabilities. A Maintenance Smartsheet exported from the STEP Workbench will not contain any information about workflow and state, so it will not be able to supply information about workflow mandatory columns. In addition, any business rules regarding the current workflow will be unavailable during import. It will also supply a different set of possible targets when maintaining product cross-references.

Step 2 - Select Objects

In this screen, select the objects for export.



When products are selected for a Smartsheet, the following settings apply:

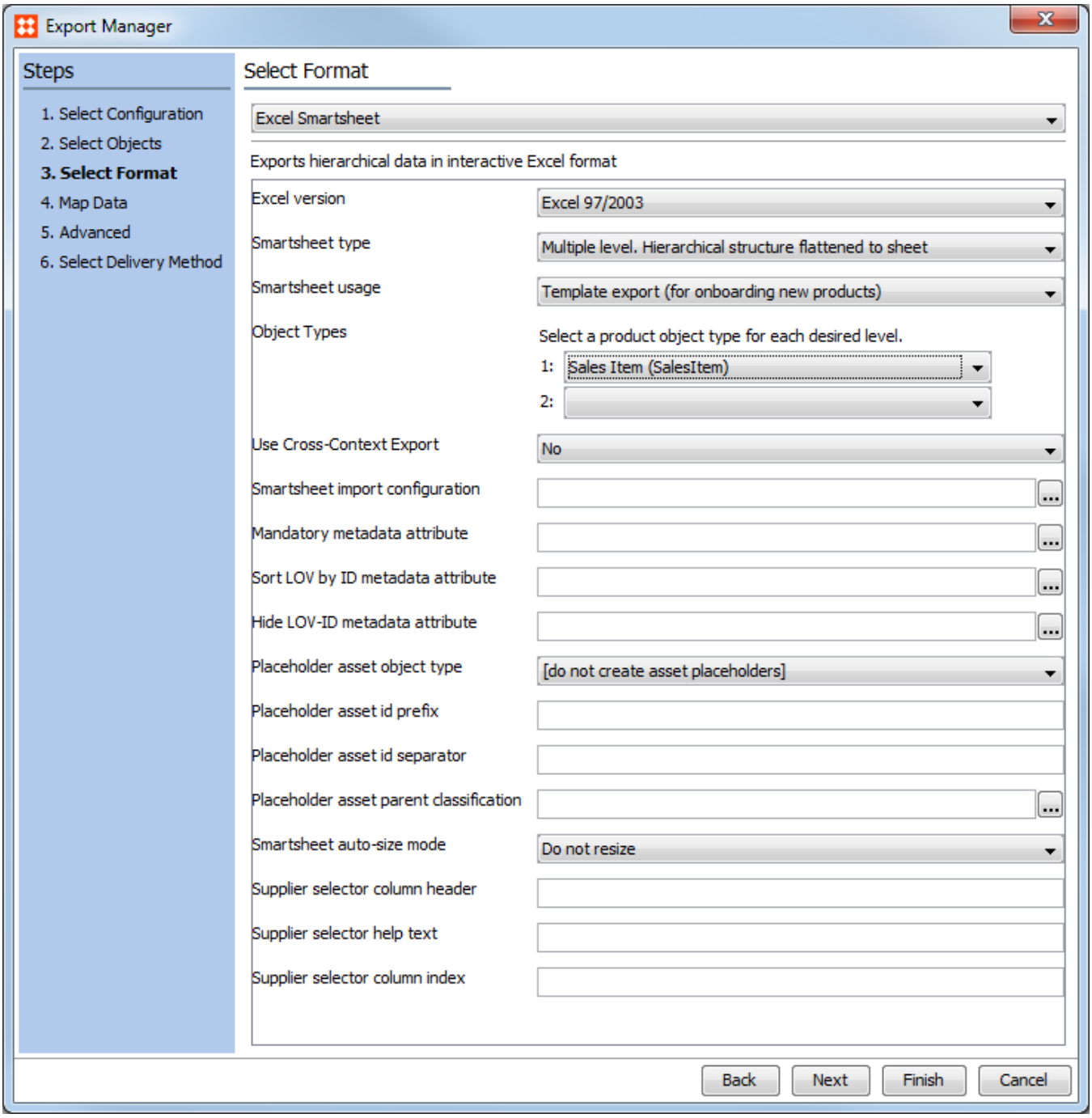
- Do not change the **Export** and **Include object types** default settings.
- For Smartsheet multilevel data export, clear **Only export selected products** and **Only export leaf objects**. Otherwise, only the topmost selection or no products at all are exported.
- For Smartsheet template export, optionally select **Only export selected products** so that the Export Manager does not have to examine the child products of the selected template product.
- Distributing the selected products across different sheets based on value validity can limit potential empty attribute cells.

For Smartsheet template export, note the following:

- If the export configuration is saved and used from the Supplier Web UI, the actual products selected in this step are irrelevant. The products will be replaced with the products selected in the Web UI.
- The selected objects are not exported in Smartsheet templates. However, the first product in the list or selection will be the parent of top-level products created when the edited template is imported.
- Selecting **Only export leaf objects** is not recommend since the import may fail, or new products may be created in the wrong place when the resulting template is later used via the saved configuration.

Step 3 - Select Format

In this screen, select **Excel Smartsheet** as the file export format.



1. In **Excel version**, select the relevant Excel version. Excel 2007 is recommended.
2. In **Smartsheet type**, the following options are available:
   - Select **Multiple level. Hierarchical structure flattened to sheet** when wanting to work with Multi-level Smartsheets. This is used to initiate and maintain products of different object types and at different hierarchy locations in STEP.

- Select **Multiple object types. Different product types intermixed** when wanting to work with Multi-object Smartsheets. This handles multiple object types simultaneously, without them being hierarchically related; i.e. one object type should not necessarily be a child of the other. This functionality works best when there is a large overlap between the set of attributes that are valid for each of the object types.

3. In **Smartsheet usage**, the following options are available:
   - Select **Data export (for maintaining product data)** to export maintainable data for products already in the STEP database.
   - Select **Template export (for onboarding new products)** to export an empty Smartsheet with formatted columns that can be used to initiate new products.
4. In **Object Types**, the following choices are available:
   - For Multi-level Smartsheets, specify the object type of the products for each level in the multi-level export. The object type must be valid for each level. The top level must be allowed under the root product selected in Step 2 of the wizard. Only 5 entries are allowed.
   - For Multi-object Smartsheets, specify the object type(s) in question. There is no limit on how many entries are allowed.
5. In **Use Cross-Context Export**, choose **Yes** or **No**.

   When set to **Yes**, the contexts that should be included in the export are specified. A column is created in the Smartsheet for each selected context on all language-dependent attributes. Remember to select the export context specified in Step 5 of the wizard in the cross-context list. If the export context is not selected, there is a risk of exporting data in an incorrect context.
6. In **Smartsheet import configuration**, select an existing import configuration to apply to the Smartsheet. The import configuration contains predefined business rules and actions. This field is optional.
7. In **Mandatory metadata attribute**, select an attribute to mark columns as mandatory in the Smartsheet. The attribute must be of the attribute type Description and of the validation base types Integer or Numeric. The attribute must also be added as metadata to attributes or attribute links. For attributes that should appear as a mandatory column in the Smartsheet, the metadata must have a non-zero value.
8. **Sort LOV by ID metadata attribute** is used for individual attribute columns that have a LOV as validation base type in order to sort the (optionally filtered) list of values by value ID. This changes the order in drop-down lists and pop-up LOV selector in the Smartsheet column(s).

   If a Description attribute made valid for attributes or attribute links contains non-zero values for the particular column, the list of values will be sorted by value ID.

   The metadata value is ignored if the attribute is not LOV based or if the LOV does not use value ID. The metadata attribute type must be Integer or Numeric. This makes it possible to have the same values for two different columns sorted both by value and value ID.
9. **Hide LOV-ID metadata attribute** is used to exclude external IDs from individual LOV-based Smartsheet columns.

10. **Placeholder asset object type** defines the object type of the assets that are created and referenced during import. This must be specified to enable asset placeholders. The available options are system dependent.

    Placeholder assets make it possible for the created assets to have a determinable ID so other processes are able to import and maintain actual asset content.

    If **[do not create asset placeholders]** is selected, the asset placeholder system is disabled and normal asset references are maintained in the Smartsheet.

11. **Placeholder asset ID prefix** is used during export from STEP Workbench to ensure that asset IDs are unique across all suppliers. The prefix will be changed during portal export. This field is optional.
12. **Placeholder asset ID separator** is inserted in the final ID between the prefix and the file name. This field is optional.

    Example: If a member of the user group 'Vendor ltd.' enters the asset file name 'Blue Running Shoe.png', the ID of the final placeholder asset is 'Vendor ltd.:Blue Running Shoe.png'. This ID is, with high probability, unique between vendors. If the ID contains invalid characters or exceeds the 40 characters limit, the name will fail validation.

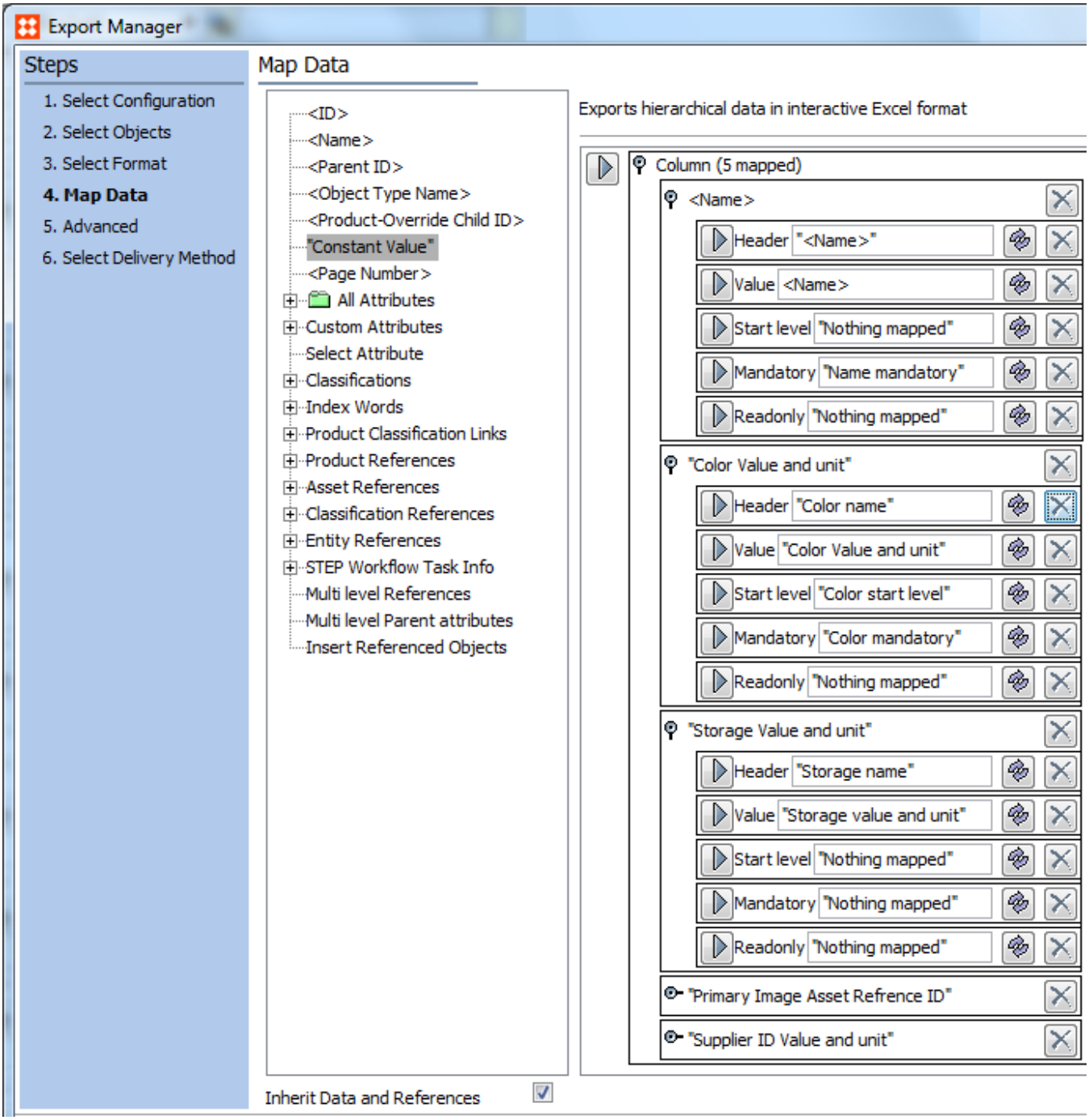
13. **Placeholder asset parent classification** defines where placeholder assets are created when the Smartsheet is re-imported. It is configurable in the Export manager to allow the export to be run from STEP Workbench.
14. **Smartsheet auto-size mode** specifies whether to resize the exported Smartsheets either by column-header width or by cell-content width using word wrap, or not to resize at all.
15. **Supplier selector column header** defines what the supplier selector column is called. Note that this parameter, as well as the 'Supplier select help text' and 'Supplier select column index', are only available when creating a Template export and when 'Enable all-view for users that are a member of multiple suppliers' is set to 'Y' in system properties (Users & Groups node).

    For more information on setting this parameter in system properties, see the **New Multi-Supplier View** section of the **STEP Trailblazer 7.3 Release Notes**.

    Unless this parameter is set, the supplier selector column is called 'Supplier' by default.

16. **Supplier selector help text** defines what the tooltip says when the cursor is placed over the supplier selector column header in the exported sheet.
17. **Supplier selector column index** determines which column the supplier selector occupies. If the parameter is not set, then the column will be placed as far to the left as possible. If this parameter is set, all columns mapped in Step 4 will be bumped to the right of whichever column is specified. Valid values are between 2 and 999.
18. Click **Next** to move on to the next screen.

Step 4 - Mapping Data for Smartsheets



For Multi-object Smartsheets:

- The **Parent ID** setting is specific to Multi-object Smartsheets. It is used as a Parent ID selector in the sheets so users can indicate the correct parent IDs for the products they work with.

- The **Object Type Name** setting is specific to Multi-object Smartsheets and is used as an Object Type selector in the sheets so users can indicate the object types for the products they work with.

For Multi-level Smartsheets:

- The **Start level** setting is specific to Multi-level Smartsheets. The setting specifies that the selected column starts a new object level.
- The **Start level** can be left empty because it is implicit. However, a value must be provided for all other Start levels. The actual value is not important.

  The Start level columns are also used for grouping products at each level. For example, all sheet rows with "T-shirt" in the Name column become 1 product, and all "Pink" color columns on rows with "T-shirt" in the Name column become one SKU Level product under the new T-shirt product.

  It is not recommended to group by multivalued attributes and reference columns.

- **Mandatory** makes the column appear mandatory in the downloaded Smartsheet. If the Smartsheet is validated in Excel, cells that are empty but marked as mandatory will appear as invalid. However, no errors are generated when the Smartsheet is imported.
- **Read only** makes the column read-only and locks all cells in the column in Excel. This setting is only relevant for data export. In template export, mappings marked as read-only are omitted.

More About Attribute Smartsheet Mapping

If attribute groups are mapped at this step, the individual attributes are ordered using the **Display Sequence** metadata for the attributes. If an attribute defines or starts a level in the Smartsheet, the first column in the group is used for sorting at this level.

Important: Do not add any kind of transformation to the value of a mapping unless it is marked as read-only. Transformations are applied during Smartsheet data export. However, during Smartsheet import, the column will be handled as if it contains Value and Unit. This can lead to import errors or unexpected imported values.

Sub-level description attributes cannot be exported to a Smartsheet unless a product of the sub-level object type is included in the export. This is usually not the case in template exports where it is recommend to select the **Export only selected products** option.

When Smartsheets are exported, LOV values are embedded in the Excel workbook so that a list of valid values is available when values are specified in a LOV-based column. The exported values are filtered according to the filters specified on the attribute and on the attribute link in the Product hierarchy.

Note: Smartsheet only supports LOV filters on attributes and attribute links.

Step 5 - Advanced

Do not select **Locale conversion from context**. It can break the automatic conversion to the client's native decimal separator and can cause the import of the Smartsheet to fail.

Note: Conditional attributes can also be exported using Smartsheets. For more information on how conditional attributes behave in Smartsheet exports, see the **Conditional Attribute Handling** topic within the **System Setup** documentation.

Importing Smartsheets with the Import Manager

When using the Import Manager to import a Smartsheet file, all relevant information is available from the Smartsheet, so no Smartsheet-specific settings need to be specified. Selecting 'Excel Smartsheet' from the **Format** dropdown in step 3 of Import Manager is all that is required.

The import configuration can be saved and used for other Smartsheet imports where the same import options should be applied. This is useful when applying the same business rules and actions to multiple Smartsheet imports. The import configuration can be specified when exporting a Smartsheet using the Export Manager.

If an import configuration is not specified during export of the Smartsheet, a fallback import configuration can be specified on the SmartSheetImportAction in the Supplier portal.

For more information, see Creating Smartsheet Data and Template Configurations in the Export Manager.

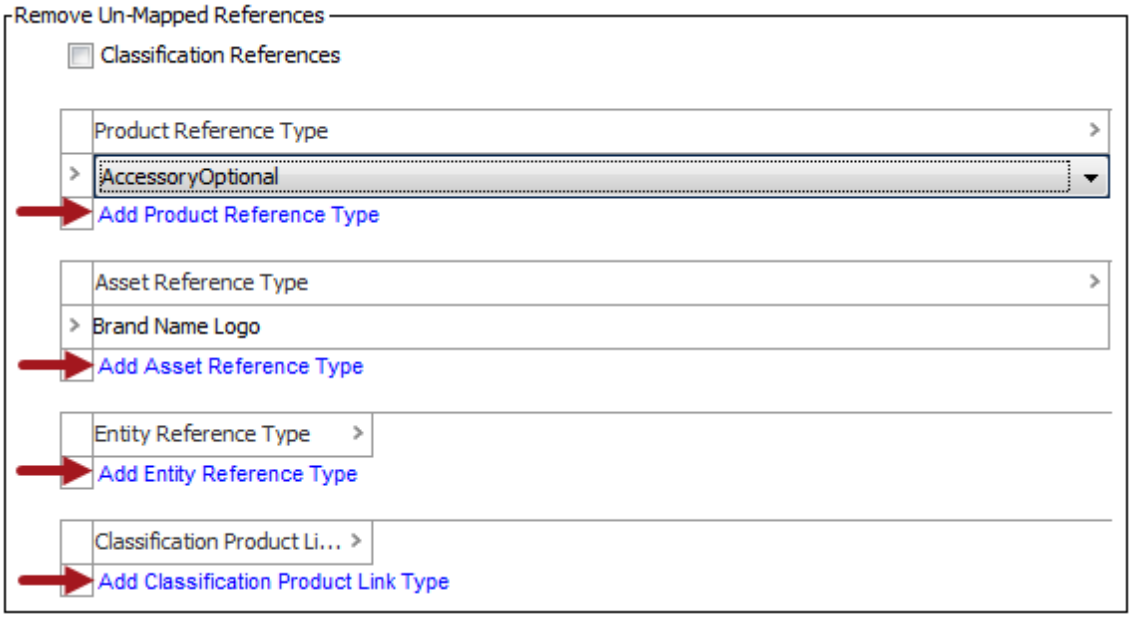
For more information about using the Import Manager, see the Importing Data and Images documentation.

Delete and Replace References

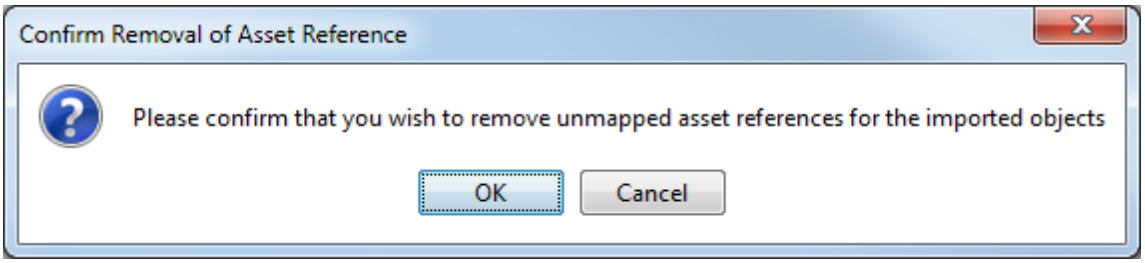
It is possible to delete / replace references when importing a Smartsheet.

References can be cleared or replaced by selecting them during the final step in Import Manager:

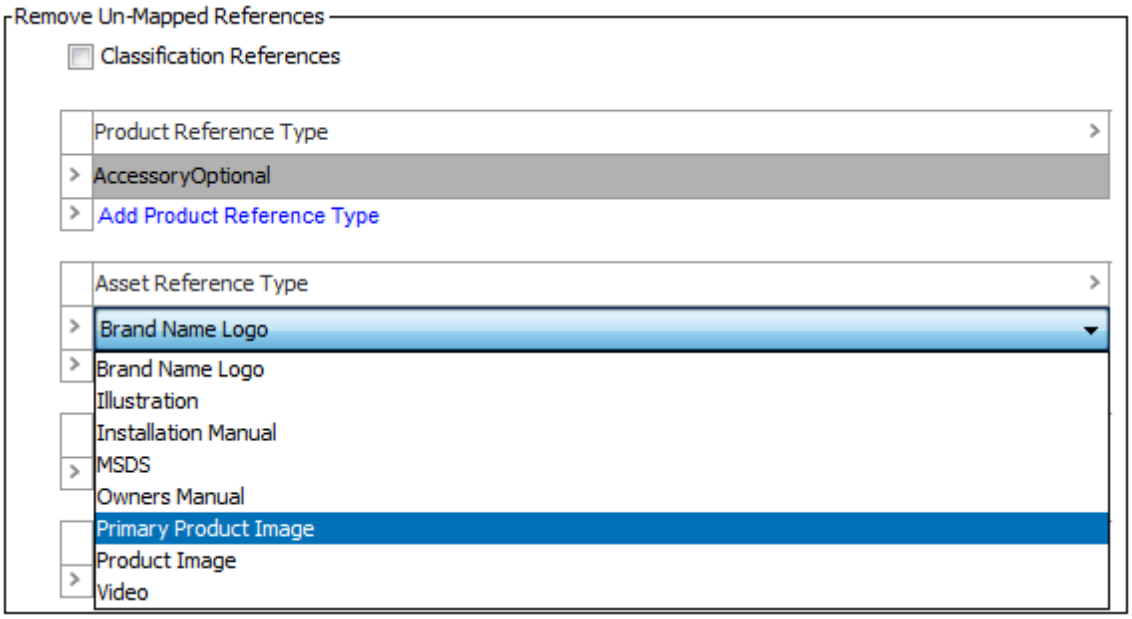
1. Progress to Step 8 in the import wizard.
2. In the **Remove Un-Mapped References** area, click the relevant 'Add Reference Type' option.



3. A warning message will appear. Click **OK**.



4. Click to open the dropdown list and select the appropriate reference type.

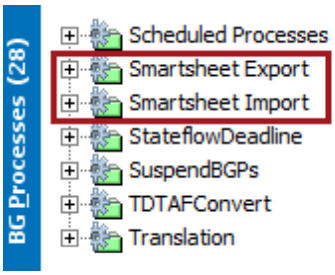


In the above example, the asset reference 'Primary Product Image' will be replaced by any new references included in the Smartsheet import. If the reference field is blank, the import will clear the reference from the corresponding product. Only Primary Product Image references that are included in the input file will be present on the products included in the file.

Smartsheet Background Processes and Queues

When the default configurations are used, Smartsheet imports and exports are placed in queue along with other import and export processes. However, Smartsheet imports and exports can be set up to run on unique queues so that they are not competing for resources with other import and export processes.

To accomplish this, the user must populate the appropriate process template when executing their import or export. Once executed, the import or export is displayed in a separate area in the **Background Processes** tab in Workbench. Smartsheet export processes will appear in the **Smartsheet Export** folder while import processes will appear in the **Smartsheet Import** folder.



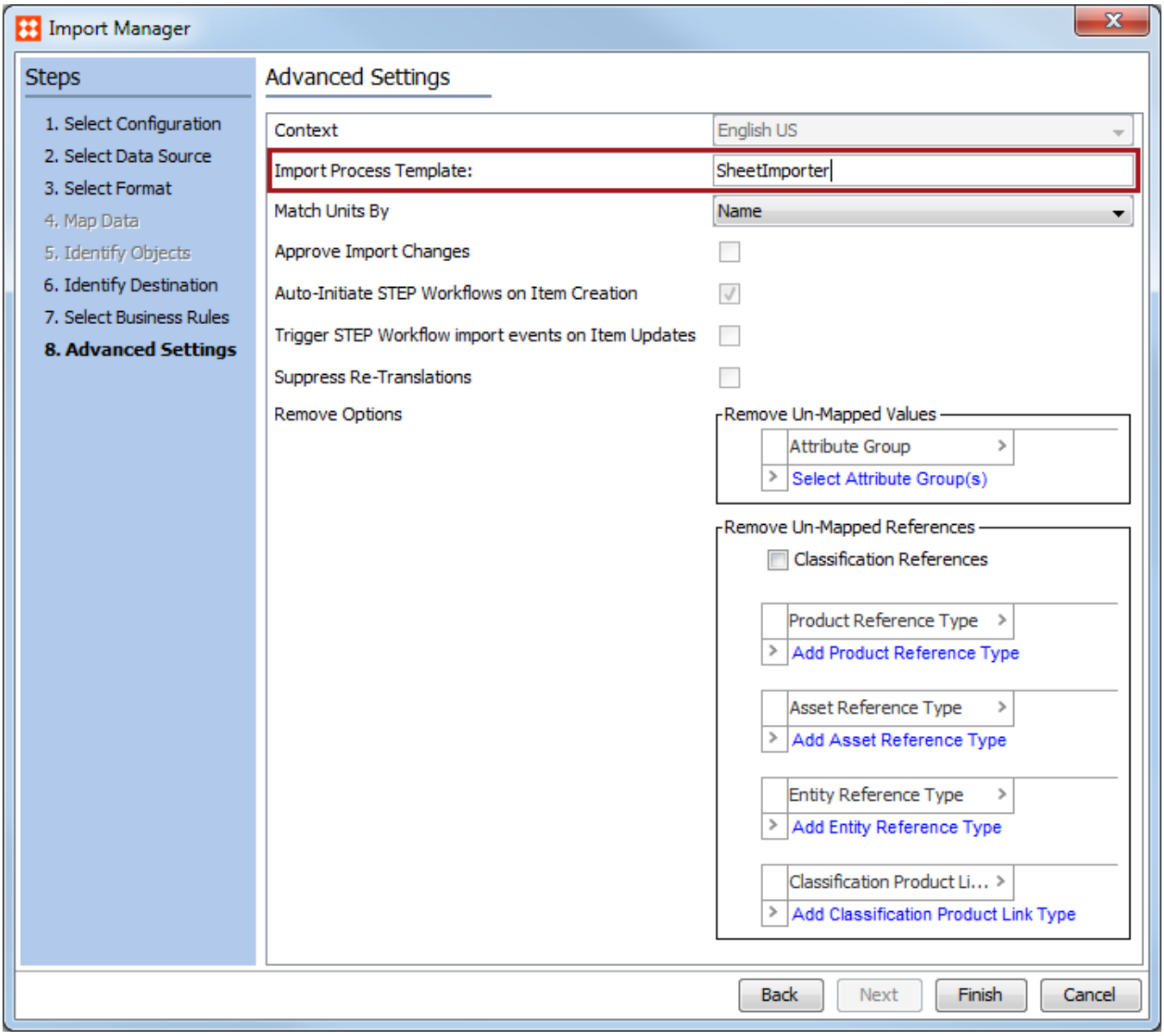
Important: 'BackgroundProcess.ProcessType.SheetExporter.Queue' and 'BackgroundProcess.ProcessType.SheetImporter.Queue' default to the same queue as Export Manager and Import Manager, and must be changed in sharedconfig.properties before they can run in their own queues. This step must be completed before the corresponding process templates can be used.

Using Smartsheet Import Background Process

On Step 8 in the Import Manager, navigate to the **Import Process Template** field and type 'SheetImporter'.

This will tell the system to display the import in the **Smartsheet Import** folder on the **Background Processes** tab.

See the 'Overview of the Data Import Manager Wizard' section within the 'Importing Data and Images' documentation for more information about the Import Manager.

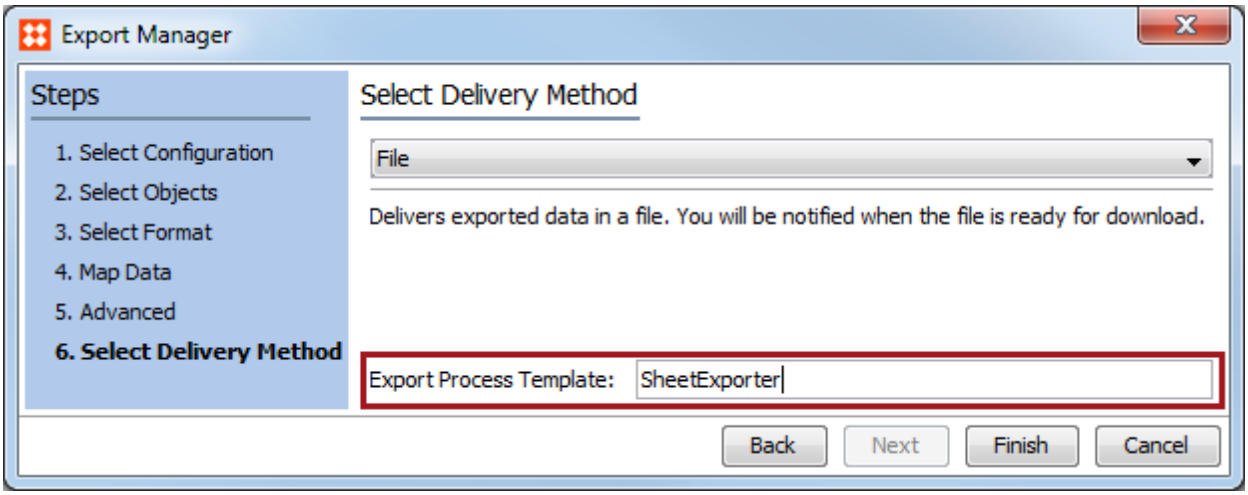


Using Smartsheet Export Background Process

On Step 6 in Export Manager, navigate to the **Export Process Template** field and type 'SheetExporter'.

This will tell the system to display the export in the **Smartsheet Export** folder on the **Background Processes** tab.

See the 'Data Export Wizard' section within the 'Exporting Data and Images' documentation for more information about the Export Manager.


Export Manager
Steps
1. Select Configuration
2. Select Objects
3. Select Format
4. Map Data
5. Advanced
6. Select Delivery Method
Select Delivery Method
File
Delivers exported data in a file. You will be notified when the file is ready for download.
Export Process Template:
SheetExporter
Back
Next
Finish
Cancel

Smartsheet System Properties

It is possible to set some configuration properties to manage the system behavior.

Limit supplier browsing

It is possible to allow the Smartsheet user to browse and search the full data set in STEP in accordance with the user's privileges. (Smartsheets exported from the Portal would previously limit browsing and searching for products/assets to the ones already marked as "owned" by the supplier for which the sheet was exported. This was enforced while maintaining product cross-references and asset references.) This is steered using a configuration property called Smartsheet.LimitSupplierBrowsing.

If this property is true, users of a Smartsheet that has been exported for a specific supplier (i.e from the Portal) will only be able to browse/search for products and assets linked into appropriate supplier classifications. This is used from the client while maintaining product cross-references and asset references.

If this property is false, users will be able to browse/search for all products and assets using the same privileges as in STEP Workbench.

Important: Notice that no matter if this property is true or false, the browse/query service disregards whether or not the current user is a supplier user. If the property is true, even super users are limited to supplier classifications. If false, supplier users will be able to access the full hierarchy using normal privileges.

The setting defaults to true, as these limitations have always been applied in Smartsheets.

Service URL override

In order for the online data validation of Smartsheet data to work, the address (URL) of the service must be embedded in the exported sheet. When exported through the Portal, this setting is assigned the address of the Portal's server. It is possible to override this with a configuration setting (for STEP Workbench export or load balancing). The STEP attributes and references used in the Smartsheet can only be validated if this URL ultimately (through whichever Portal server) points back to the STEP server from which the Smartsheet is exported; i.e. it is possible to export a Smartsheet from PortalServerA and have it validated at PortalServerB as long as they share the same STEP backbone.

This setting is steered via the Smartsheet.ValidationService property.

Trusted headers authentication

One can make use of Trusted Headers authentication in conjunction with Excel Smartsheets. This enables end users to, for example, make use of their intranet login and password when validating Excel Smartsheets. To make use of Trusted Headers in Excel Smartsheets, the following instructions need to be followed:

1. An authentication proxy needs to be in place that can:
   - Make basic authentication from the calls from Excel
   - Extract the User ID and password from the basic authentication token

2. Forward all requests, including all payloads, from Excel to STEP if the request is authenticated
3. Add a header to all requests to STEP containing the User ID
4. The following configuration parameters need to be set in STEP config.properties:
   - Excel.UseTrustedHeaders=true;
   - Excel.TrustedHeaders.Username=[Name of the header that contains the User ID]

Initiating and Maintaining Products in the Supplier Web UI Using Smartsheets

Excel Smartsheets are useful for initiating or maintaining many products at a time. To do this, a Smartsheet template file must first be downloaded from the Supplier portal.

This topic addresses:

- Prerequisites
- Downloading a Smartsheet Template
- Downloading a Smartsheet with a Supplier Selector
- Downloading a Smartsheet with Data
- Entering Data in a Smartsheet
- Copying Data in a Smartsheet
- Upload a Smartsheet to the Supplier Portal
- Initiating Multiple Product Object Types using a Smartsheet

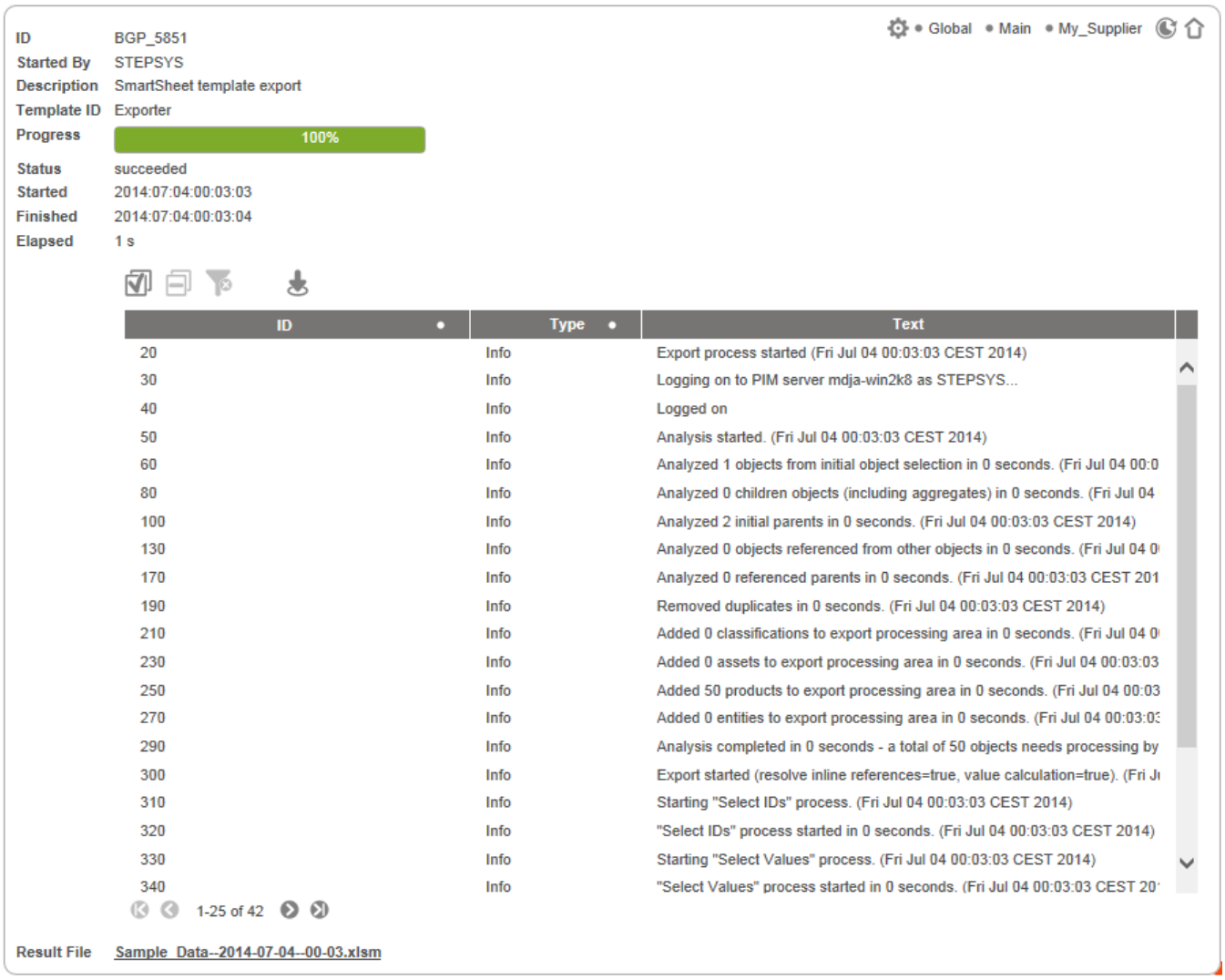
Prerequisites

The Supplier portal must have been configured for Smartsheets before users can download templates or data or upload Smartsheets. Also, a Smartsheet template must have been configured in the Export Manager, and the template configuration must have been associated with a Smartsheet template widget.

Downloading a Smartsheet Template

1. In the **Smartsheet template** widget, click the browse hierarchy icon to browse to the desired product level for export. No actual products are exported.

2. Click **Export** to download the Smartsheet.
3. A download process starts and the download process page is displayed:



4. When the process is finished, click the **Result file Sample Data**.
5. Save the file to the relevant location.

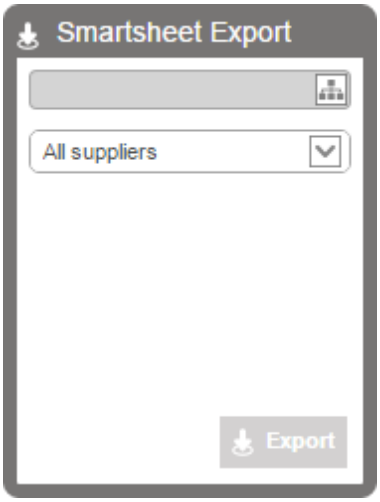
Downloading a Smartsheet with a Supplier Selector

Users that belong to multiple supplier groups can, within a single Smartsheet, load data for all suppliers to which they have access. Once configured, a supplier selector column will appear on the Smartsheet template. Users can select suppliers on a row-by-row basis, with each object being linked to the selected supplier upon import.

For information on how to configure a Smartsheet template with a supplier selector column, see Step 3 of the **Creating Smartsheet Data and Template Configurations in the Export Manager** section in the **Excel Smartsheet** documentation.

Before a Smartsheet can be exported with a supplier selector column, the user must ensure that the 'Enable all-view for users that are a member of multiple suppliers' is set to 'Y' in system properties. For more information, see the **New Multi-Supplier View** section of the **STEP Trailblazer 7.3 Release Notes**.

1. In the **Smartsheet template** widget, click the browse hierarchy icon and select a valid node based on the object type(s) specified in the Smartsheet template. The category specific attributes that appear in the exported Smartsheet are dependent on the selected node and all applicable child nodes. No actual product data is exported.

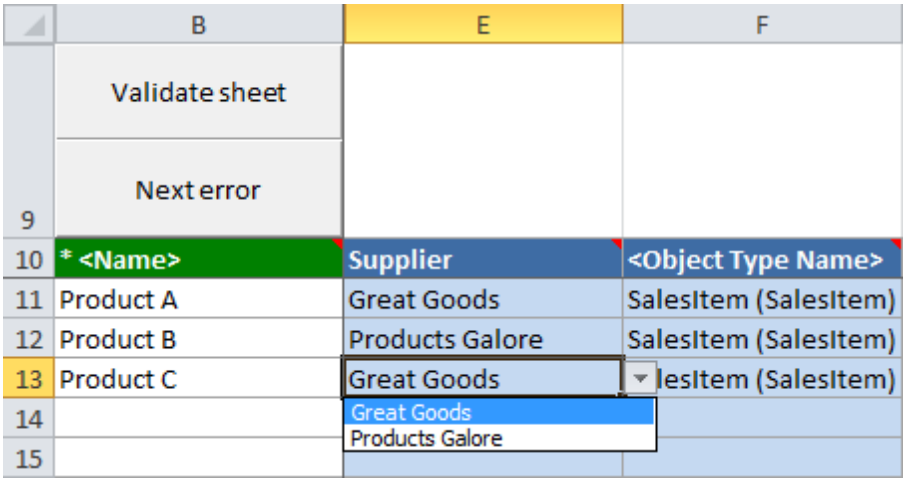


2. If the user is a member of multiple supplier groups the supplier dropdown will appear underneath the node picker. If the user is only a member of a single supplier user group, the supplier drop down will not be present.

   Users can only make a selection from the supplier groups they belong to. Additionally, when selecting 'All suppliers', the supplier selector column will only include the supplier groups that the user belonged to at the time of the export.

   If the user is not a member of multiple supplier groups or the user specifies a supplier using the dropdown, the supplier selector column will not appear in the exported sheet. If 'All suppliers' is selected, the column will appear in the export.

3. Click **Export** and download the Smartsheet.



Users who do not belong to the same supplier group as a product they are working with will be unable to validate the product. Additionally, if the user does not belong to the applicable supplier groups when importing the data, the newly created products will fail to link to their designated supplier groups.

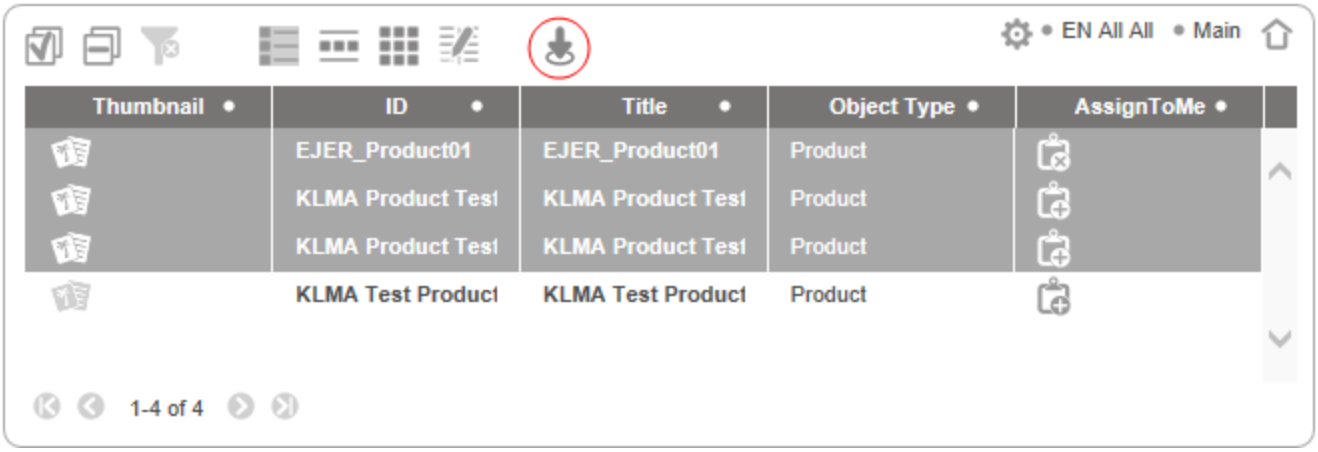
Note: To avoid this, a business condition can be set up to run on import, checking for the supplier link. If the condition fails, then the creation of the product in question is rolled back.

Important: When using a Multi-Level Smartsheet, the supplier selector column can only be included in a top level.

Downloading a Smartsheet with Data

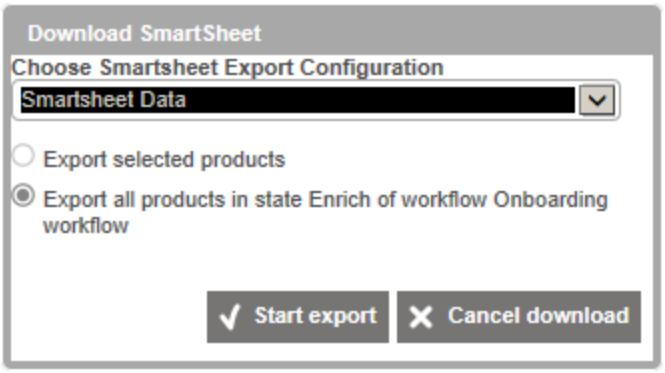
To maintain existing products, download a Smartsheet with data.

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



2. Select the products that should be exported in the Smartsheet file.

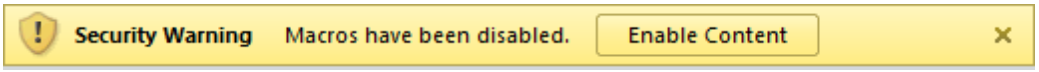
3. Click the **Download Smartsheet** icon . If more download icons are available, hover the mouse over the icons to locate the appropriate icon.



4. In the **Download Smartsheet** dialog, choose the relevant export configuration and then select the relevant products for export.
5. A download job starts and the download job page displays.
6. When the download job is finished, click **Download**, then save the file to the relevant location.

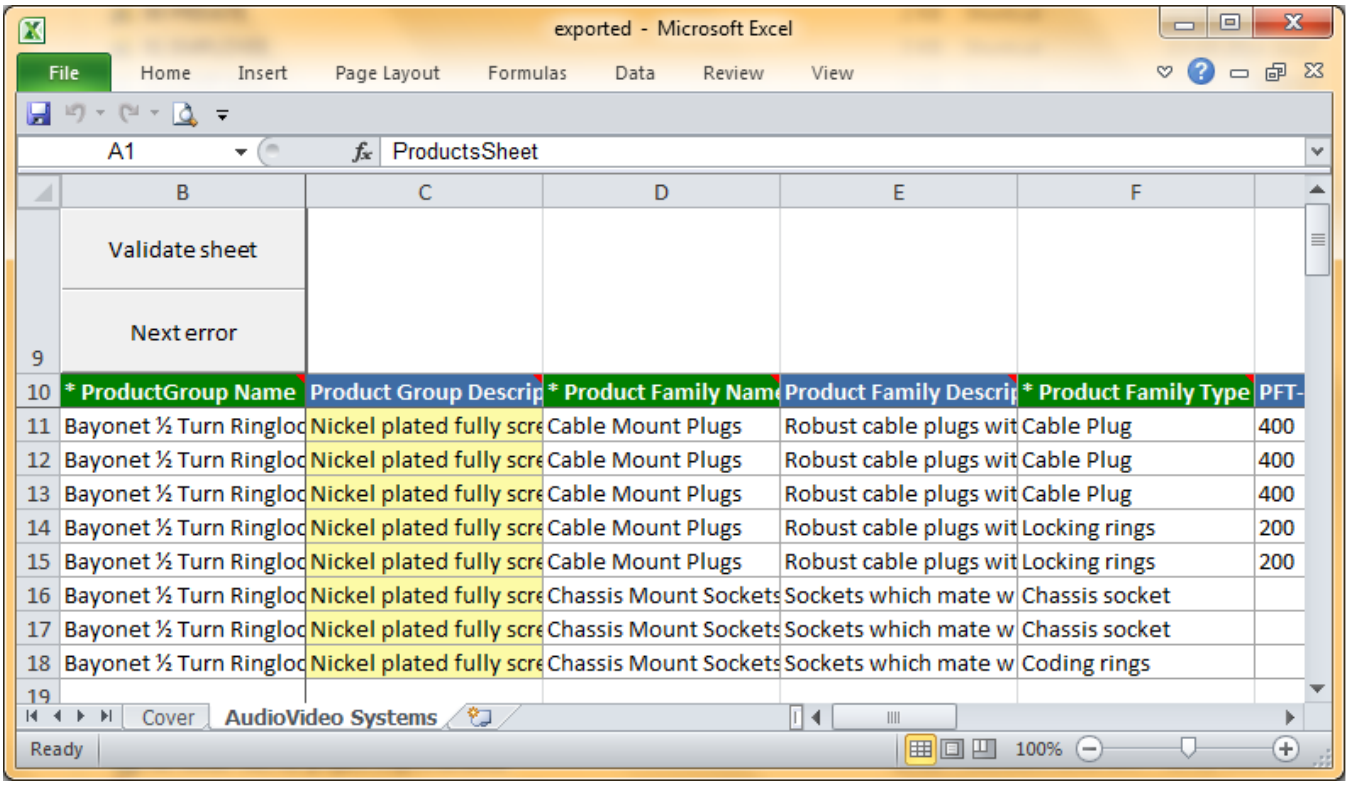
Entering Data in a Smartsheets

1. In **Excel**, open the applicable Smartsheet. If the Smartsheet has never been opened before it will open on the **Cover** tab, which contains information about the download date and the color codes used in the Smartsheet. Additionally, a security warning will appear at the top of the cover page.



Click **Enable Content** to enable macros, otherwise the Smartsheet will not work correctly.

2. On the workbook, click the second tab, which has the name of the node selected during the export process.



3. Enter the data for the objects to be imported.
4. Click **Validate sheet** in the top left corner. In the 'Validate Smartsheet Contents' dialog two check boxes are available:

- **Validate only changed products** - The Smartsheet will only validate products that have been changed. Leaving this box unchecked means all products are validated.
- **Validate all product sheets** - The Smartsheet will validate all sheets in the workbook. Leaving this box unchecked means only products that appear on the currently selected sheet will be validated. This check box is only available if multiple sheets exist in the workbook.

5. Click **OK**.
6. In the **Login** dialog, enter the relevant STEP user name and password and click **Login**.
7. After the validation is run the **Validate Smartsheet Contents** window will display if the validation succeeded or if there are errors that need to be corrected.

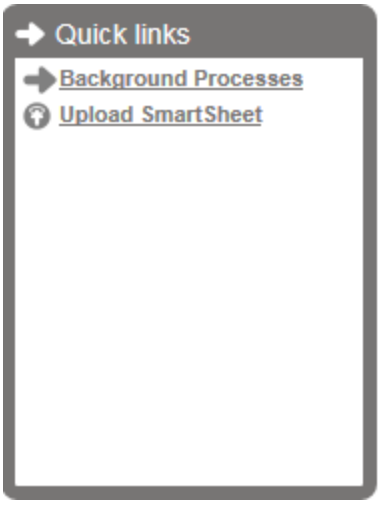
   Errors can be located and manually corrected via the **Next Error** button.

8. Save the file.

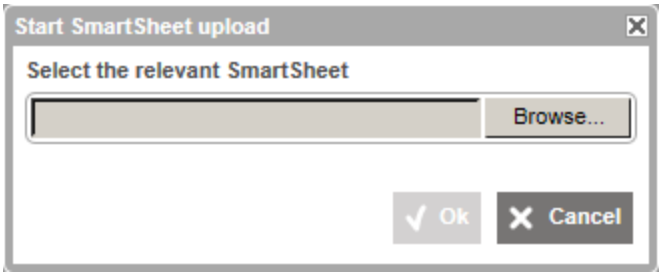
Note: Some fields, such as node pickers, will prompt the user for a STEP user name and password. The system will only prompt for these credentials once.

Upload a Smartsheet to the Supplier Portal

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



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



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

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

Initiate Multiple Product Object Types

In some cases there is a need to use Excel Smartsheets to initiate products of different object types and at different hierarchy locations in STEP. The multi-object Smartsheet allows users to easily upload multiple object types simultaneously, and without them being hierarchically related; i.e. one object type should not necessarily be child of the other. This works best when there is a large overlap between the set of attributes that are valid for each of the object types.

The multi-object Smartsheet handles multiple mutually independent object types in the same Excel workbook. For each product category selected for download, a sheet will be added to the Excel workbook. Each sheet can contain all configured object types alongside each other, with handling of multiple object types supported throughout sheet export, validation, and import.

Note: In order to support this, the export configuration (download) for the multi-object Smartsheet must include mapping of the object type. Upon upload, this column must be populated with the desired object type for all new products. Additionally, the configuration can contain a mapping for Parent ID which displays in the downloaded sheet as a column with a selector dialog so that end users select from valid parent objects.

Configuring Smartsheets in the Supplier Portal

To be able to configure Smartsheets in the Supplier portal, users must be members of a Supplier portal user group and have sufficient privileges to run the portal in Design mode.

Also, before the Smartsheet can be configured in the Supplier portal, the relevant template must already have been created, as well as the data export and import configurations in the Export and Import Manager.

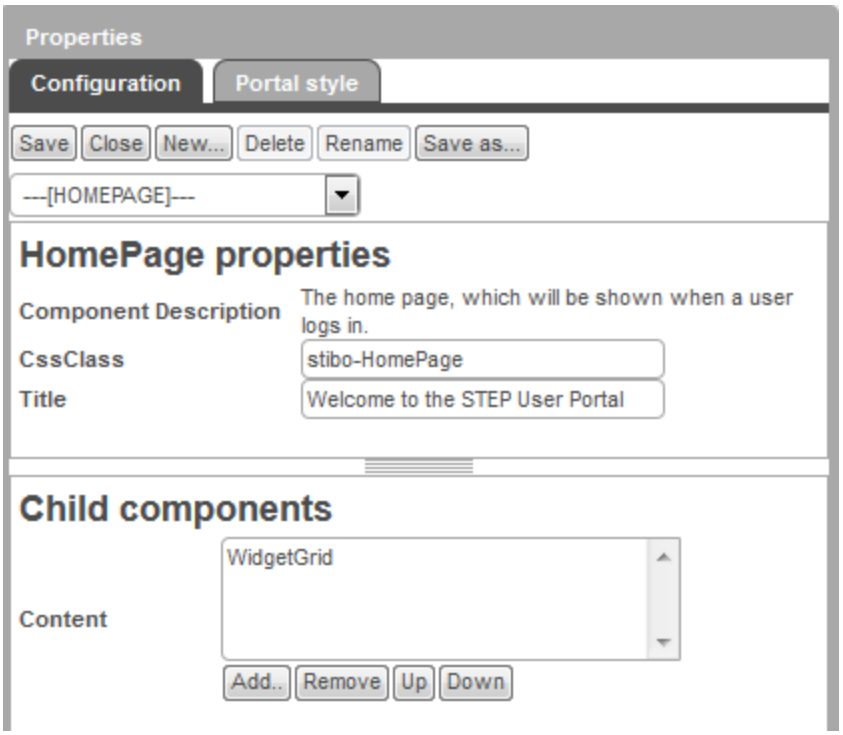
Configuring the Smartsheet Template Widget

The Smartsheet Export Template widget is used to initiate many products at a time. A Smartsheet template file is downloaded from the portal, then the preferred products are added.

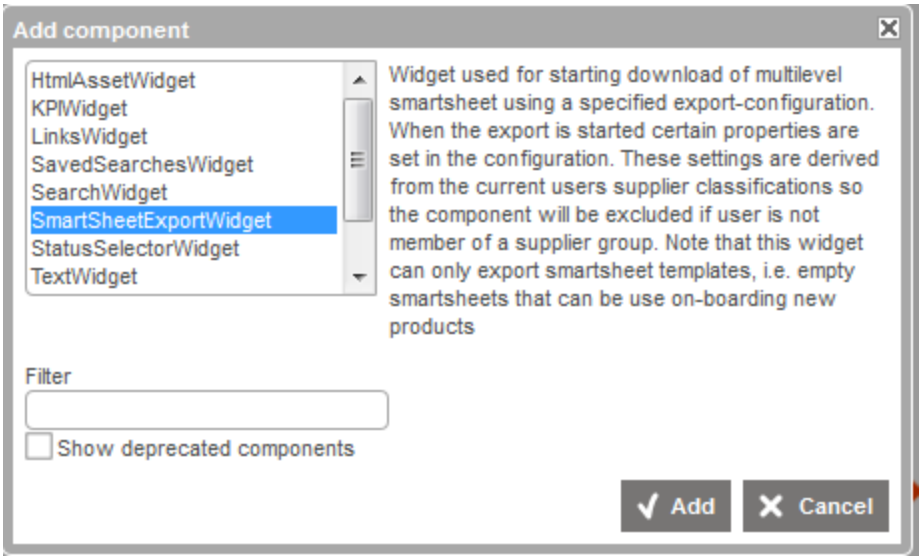
To use the Smartsheet Template widget, the widget in the Supplier portal must be configured and associated with a template export configuration.

Add a Smartsheet Template WidgetGrid

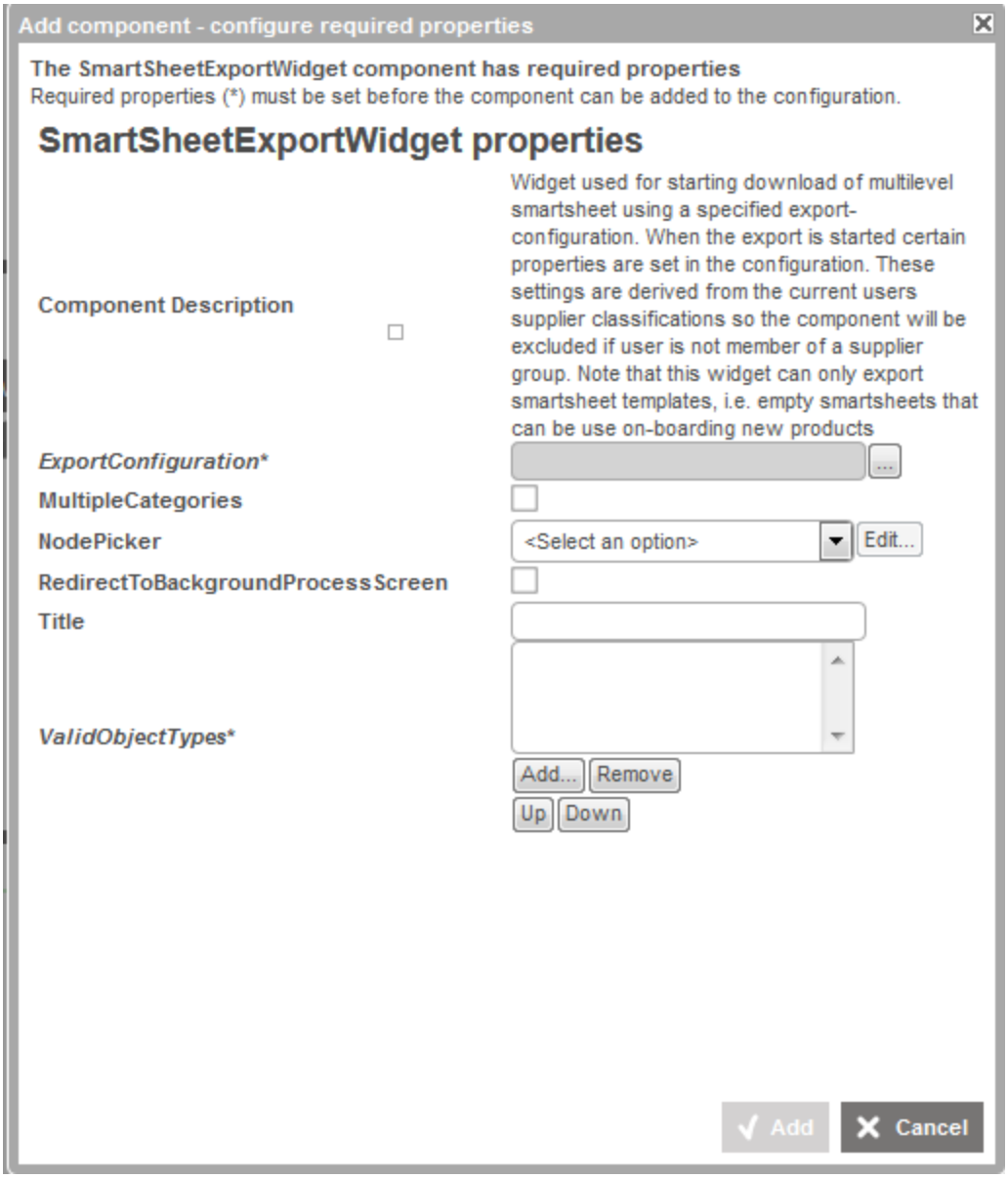
1. On the **Home** page, click the **gear wheel** icon to enter **Design mode**. The **HomePage Properties** dialog appears.



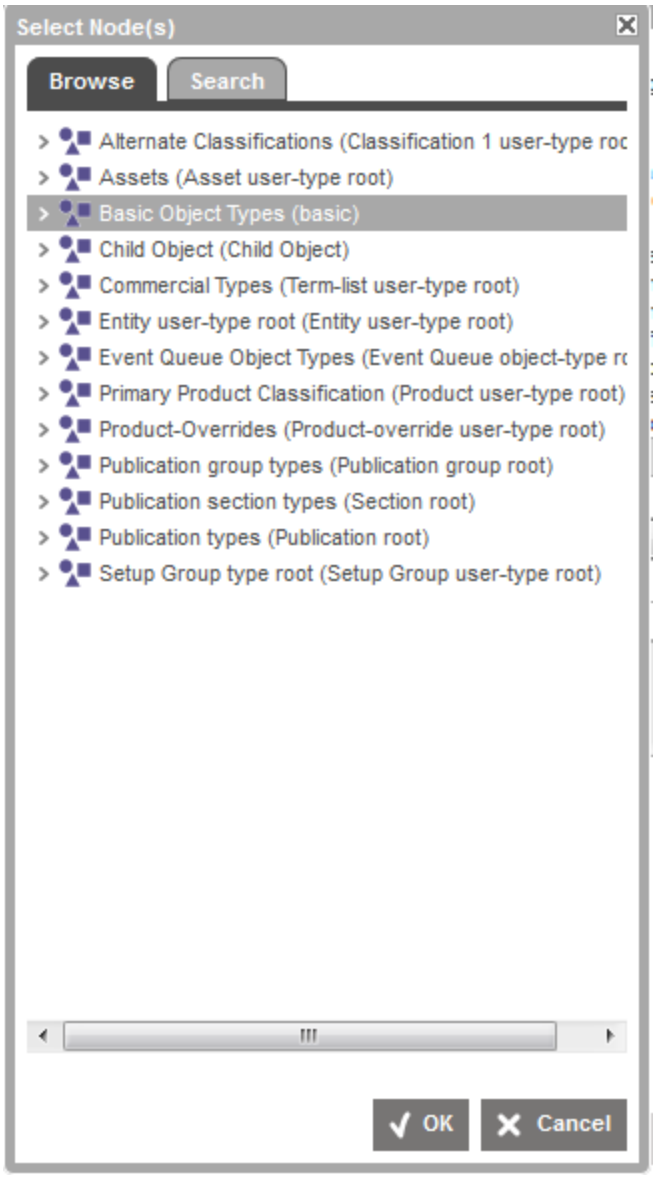
2. In **Child components**, in the **Content** area, double-click **WidgetGrid**. The **WidgetGrid Properties** dialog appears.
3. In **Child components**, in the **Widgets** area, click **Add**.
4. In the **Add component** window, select **SmartSheetExportWidget**, then click **Add**.



The **SmartSheetExportWidget properties** window appears. This is where the export configuration that should be associated with the Smartsheet export template is selected. **ExportConfiguration** and **ValidObjectTypes** are required properties that must have a value.



5. In **ExportConfiguration**, click the ellipsis button **(…)** to **Browse** or **Search** for the relevant export template configuration. ExportConfiguration is a required property and must have a value.
6. In **ValidObjectTypes**, click **Add**, select the object types that should be valid for the template, then click **OK**. ValidObjectTypes is a required property and must have a value.



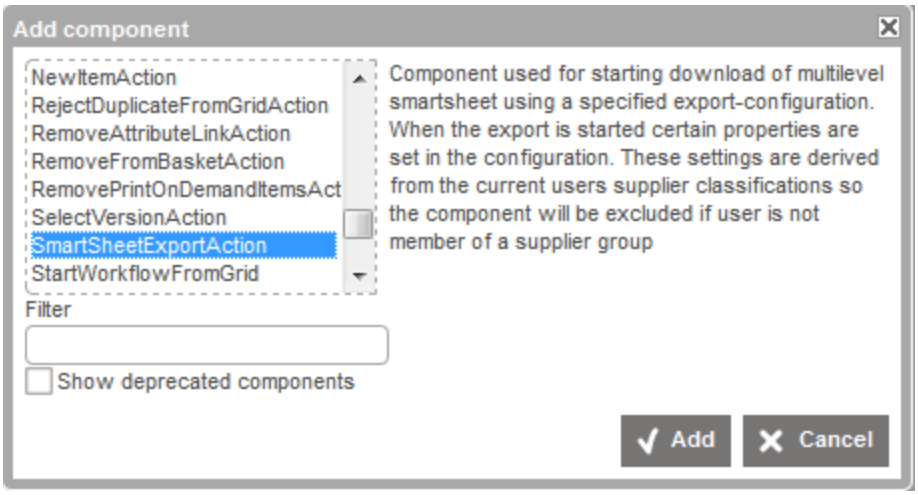
7. In the **Properties** window, click **Add**. A Smartsheet template widget is added to the home page.

Configuring the Smartsheet Export Action

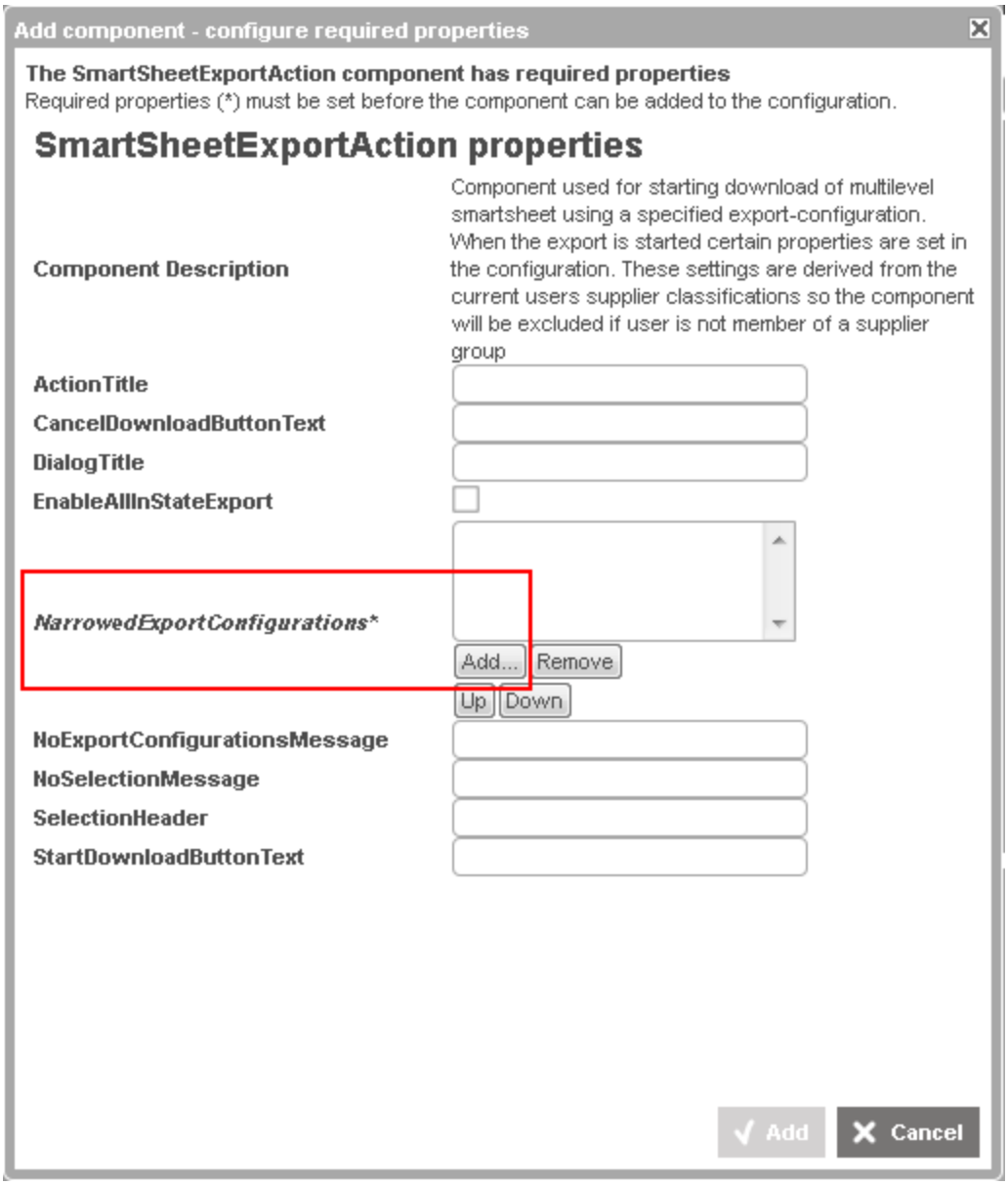
The Smartsheet Export Action must be configured on the screens and lists in the Supplier portal where users wish to export data in an Excel Smartsheet.

Add the Smartsheet Export Action to a Workflow State

1. On the **Homepage**, in the **Workflow** widget, click the workflow state where the action should be added.
2. Click the **gear wheel** icon to enter Design mode, then click the area where the action should be added. The **NodeList** properties window appears.
3. In the **Child component** area below **Actions**, click **Add**. The **Add component** dialog appears.



4. Select the **SmartSheetExportAction**, then click **Add**. The **SmartSheetExportAction Properties** dialog appears.
5. Specify the property settings.
6. In the **NarrowedExportConfigurations** list, click **Add**.



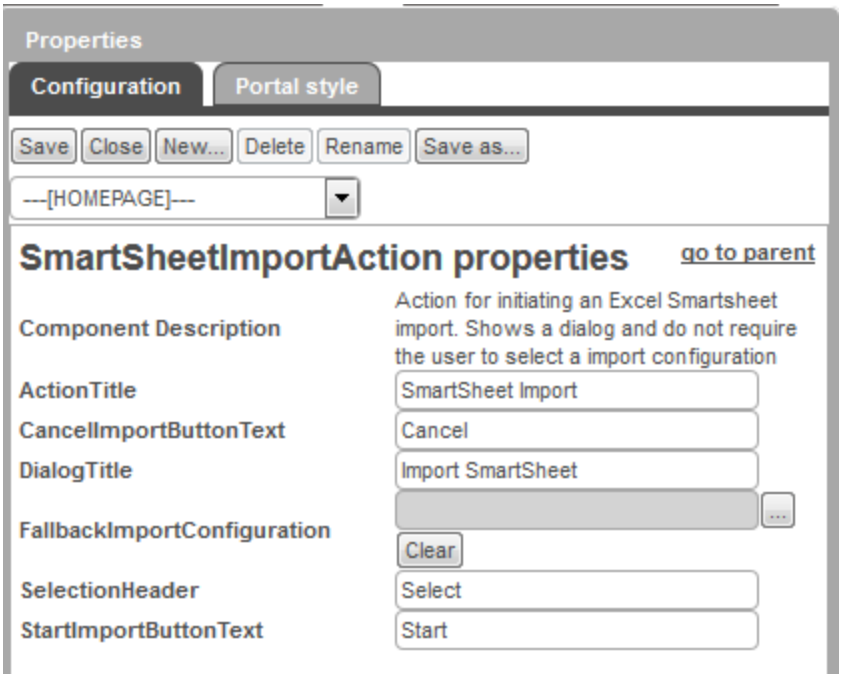
7. Search or browse for the relevant export configuration, then click **Add**. This must be a data export configuration, not a template configuration.
8. Repeat steps 1-7 as needed to add the Smartsheet Export Action to other workflow states.

Configuring the Smartsheet Import Action

The Smartsheet Import Action must be configured on the screens and lists in the Supplier portal where users wish to import data from an Excel Smartsheet.

Add the Smartsheet Import Action to a Workflow State

1. On the **Homepage**, click the **gear wheel** icon to enter Design mode.
2. Click the **QuickLinks** area. This is where to add the action. The **LinksWidget properties** window appears.
3. In the **Child component** area, select **SmartSheetImportAction**. The **Add component** dialog appears.
4. Specify the property settings.



5. In the **FallbackImportConfiguration**, search or browse for an existing import configuration to apply to all Smartsheet imports where no import configuration was specified in the Export Manager. This field is optional.

Workflow State and Transition Mandatory Attributes

It is often necessary that attributes or whole groups of attributes are mandatory for a state or transition in a STEP Workflow. This means that the object can only pass further in the workflow if the indicated attributes have values.

To facilitate this, the relevant mandatory attribute groups and/or attributes can be indicated directly in the STEP Workflow Designer, with mandatory indications being enforced in both the workbench and Web UI (Portal).

This simplifies the configuration within the workflow itself, but also enables business users to steer the Web UI and Smartsheets behavior for end-users without requiring use of the STEP Portal Designer.

For more information on setting up, see the **Mandatory Attributes in Workflows** section of the **Workflows** documentation.

Handling Workflow State and Transition Mandatory Attributes in Smartsheets

Excel Smartsheets also handle workflow state mandatory attributes (though not for transition mandatory attributes). Upon validation of the Smartsheet, the user is informed about any attributes that are mandatory and unpopulated.

Color Codes:

Blue=Mandatory. Information must be added.

Yellow= Read Only. Information can not be altered

Red= The cell holds data that failed the validation

Important: Attributes mandatory for transitions are not enforced in Smartsheets as the selected transition is not known.

For information about conditionally mandatory attributes are handled in Smartsheets, see the **Conditionally Mandatory Workflow Attributes** section of the **STEP Workflows** documentation.