

PUBLISHING WEB UI USER GUIDE

The logo for StiboSystems, featuring the company name in a white sans-serif font. The 'i' in 'Stibo' has a small crown-like symbol above it. The logo is positioned on the left side of the page, partially overlapping a large orange triangle that points towards the right.

StiboSystems

STEP Trailblazer

Table of Contents

Table of Contents	2
STEP Publishing Web UI	4
Print on Demand	5
Creating a new Print on Demand Publication	5
Set Publication Options	6
Manage Products	7
Review Publication	9
Review a saved Print on Demand Publication	10
Creating a New Print on Demand Publication based on an Existing Publication	10
Print on Demand Configuration Options	11
Email PDF to User	11
Show Review Publication Wizard Step	11
Show Template Previews	12
Actual Page Viewer	13
Proof View	15
Page Revision Comparisons	17
Summary	17
Details	17
Considerations and Limitations	18
Working with Commercial Data in the Publishing Web UI	20
Configuring the Commercial Data Component in Web UI	20
Importing Commercial Data in Web UI	26
Importing the Commercial Data Spreadsheet	28
Editing Commercial Data in Web UI	28
Editing Terms	29

Limitations and Considerations	30
For More Information	30

STEP Publishing Web UI

The purpose of the STEP Publishing Web UI is to enable users to generate JPEG and PDF proofs of products and review publications. This can be done for an individual product or for a selection of products to form a publication.

The Publishing Web UI also supports Publication Excel imports, side-by-side comparison of page revisions, and limited Flatplanner functionality.

The following are the main areas of functionality within the STEP Publishing Web UI:

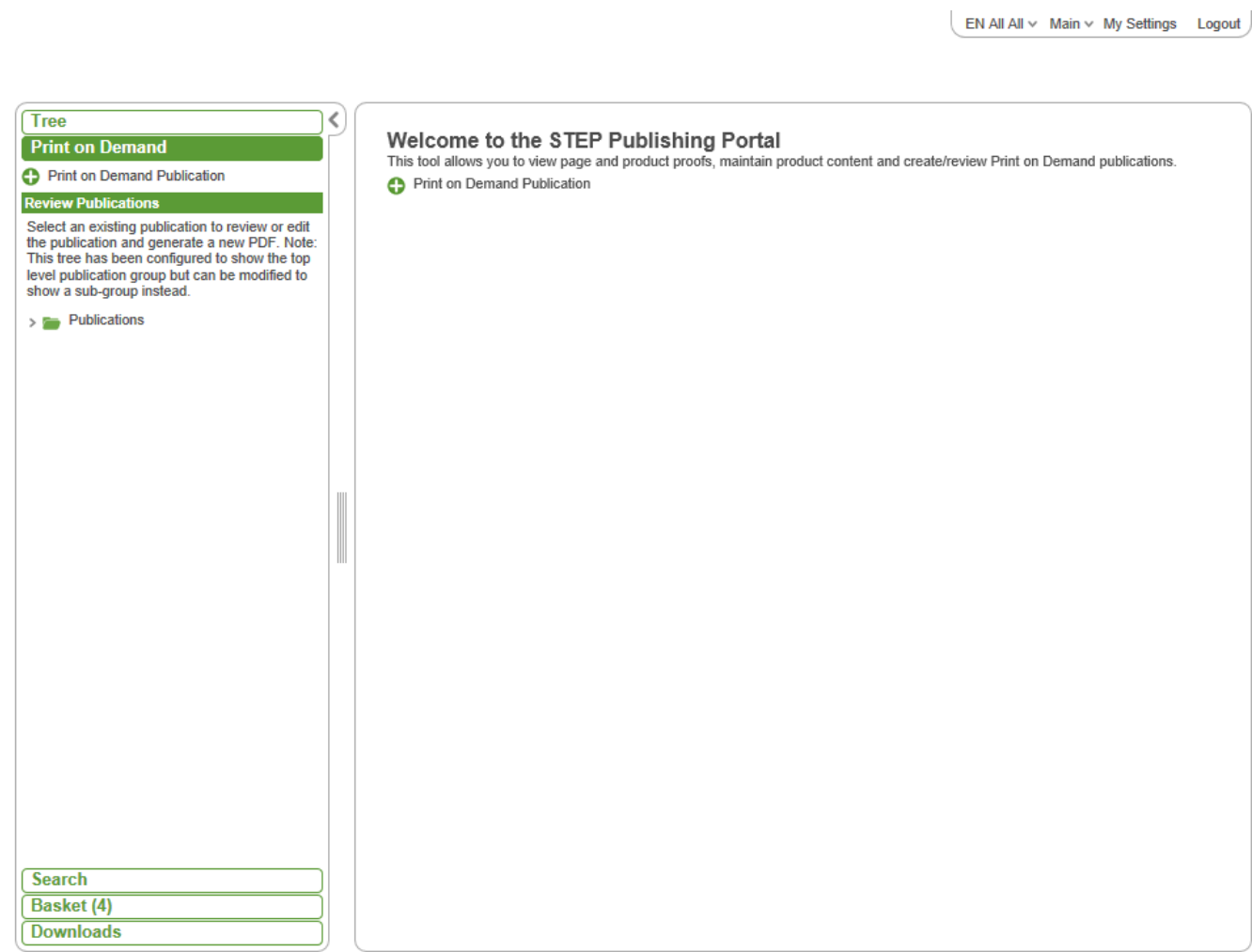
- Print on Demand
- Actual Page Viewer
- Planned Page Viewer
- Proof View
- Revision Compare
- Publication Excel import

For information on importing Publication Excel files in Web UI, see **Importing Publications in Excel** in the **STEP'n'design** documentation.

Note: Supported versions of Adobe InDesign are CS6, CC 2015 (CC11), and CC 2015.4 (CC11.4.0, June 2016 release).

Print on Demand

To access the Print on Demand functionality, select the Print on Demand tab in the left hand side panel. You can create a new Print on Demand publication by selecting the “+” icon. Existing publications can be reviewed by selecting them in the Review Publications tree.



Creating a new Print on Demand Publication

Select the “+” icon. This will display the Print on Demand Wizard for creating a new Print on Demand Publication with the following steps available:

Set Publication Options

EN All Main My Settings Logout

Tree

Print on Demand

Print on Demand Publication

Review Publications

Select an existing publication to review or edit the publication and generate a new PDF. Note: This tree has been configured to show the top level publication group but can be modified to show a sub-group instead.

> Publications

Search

Basket (4)

Downloads

1. Set Publication Options > 2. Manage Products > 3. Review Publication

Publication Name: Documentation

Start on Page: 4

Template:

Main Catalogue

Brochure

Flyer

Next

In this step of the wizard, you must specify a Publication Name for your new publication, specify a page number for the publication to start on and select a Template to base the publication on. A template can be selected by either using the template selection dropdown menu or by selecting from the template thumbnails. The template selection dropdown supports selection of the template by typing the first few letters of the template name.

Once a Publication Name and Template have been specified, the “Next” button will become enabled. Pressing this will take you to the Next step of the wizard.

Manage Products

EN All AllMainMy SettingsLogout

Tree

Print on Demand

Print on Demand Publication

Review Publications

Select an existing publication to review or edit the publication and generate a new PDF. Note: This tree has been configured to show the top level publication group but can be modified to show a sub-group instead.

Publications

Search

Basket (4)

Downloads

1. Set Publication Options2. Manage Products3. Review Publication

Select AllClear SelectionAdd ItemsRemove ItemsMove UpMove Down

Thumbnail	Name	ID	Path
	Möbelhjul dubbellänkhjul typ KP	BBtool_BB5487	Primary Product Hierarchy/Custom Cases/BBTool PIMautopage/BBTools Arbetsplatsutrustning/Transp (BBtool_5448)/Transporthjul/ dubbellänkhjul typ KP
	Länkhjul typ AO 36	BBtool_BB5492	Primary Product Hierarchy/Custom Cases/BBTool PIMautopage/BBTools Arbetsplatsutrustning/Transp (BBtool_5448)/Transporthjul/ typ AO 36
	Plasthjul fasthjul typ FPR 86	BBtool_BB5470	Primary Product Hierarchy/Custom Cases/BBTool PIMautopage/BBTools Arbetsplatsutrustning/Transp (BBtool_5448)/Transporthjul/ fasthjul typ FPR 86
	Ottomanhjul typ FWR	BBtool_BB5457	Primary Product Hierarchy/Custom Cases/BBTool PIMautopage/BBTools Arbetsplatsutrustning/Transp (BBtool_5448)/Transporthjul/ typ FWR
	Plastlänkhjul typ FP 86	BBtool_BB5469	Primary Product Hierarchy/Custom Cases/BBTool PIMautopage/BBTools Arbetsplatsutrustning/Transp (BBtool_5448)/Transporthjul/ typ FP 86
	Möbelhjul bromshjul typ BKP	BBtool_BB5494	Primary Product Hierarchy/Custom

1-9 of 9

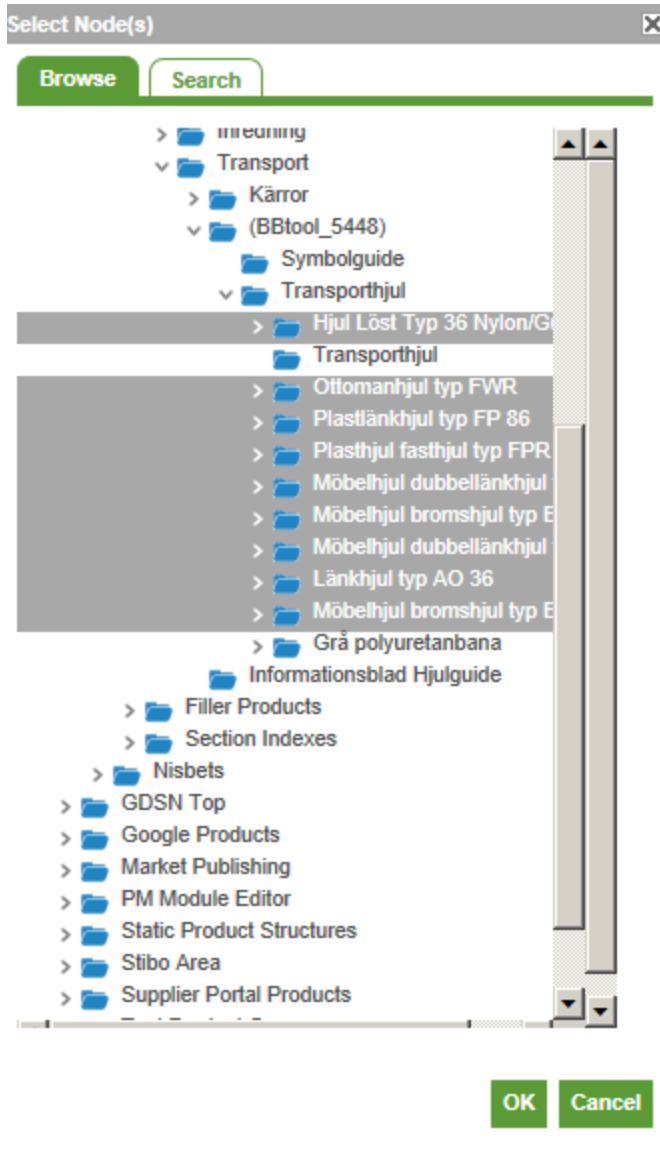
BackNext

In this step of the wizard, you can add or remove items from your publication and change the order in which they will be paginated.

Selecting “Add Items” pops up a node chooser to allow you to browse or search for the Products, Assets or Classifications you wish to add to the publication. Multiple items can be added at the same time by using either Ctrl-Click or Shift-Click in the Browse tree.

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7



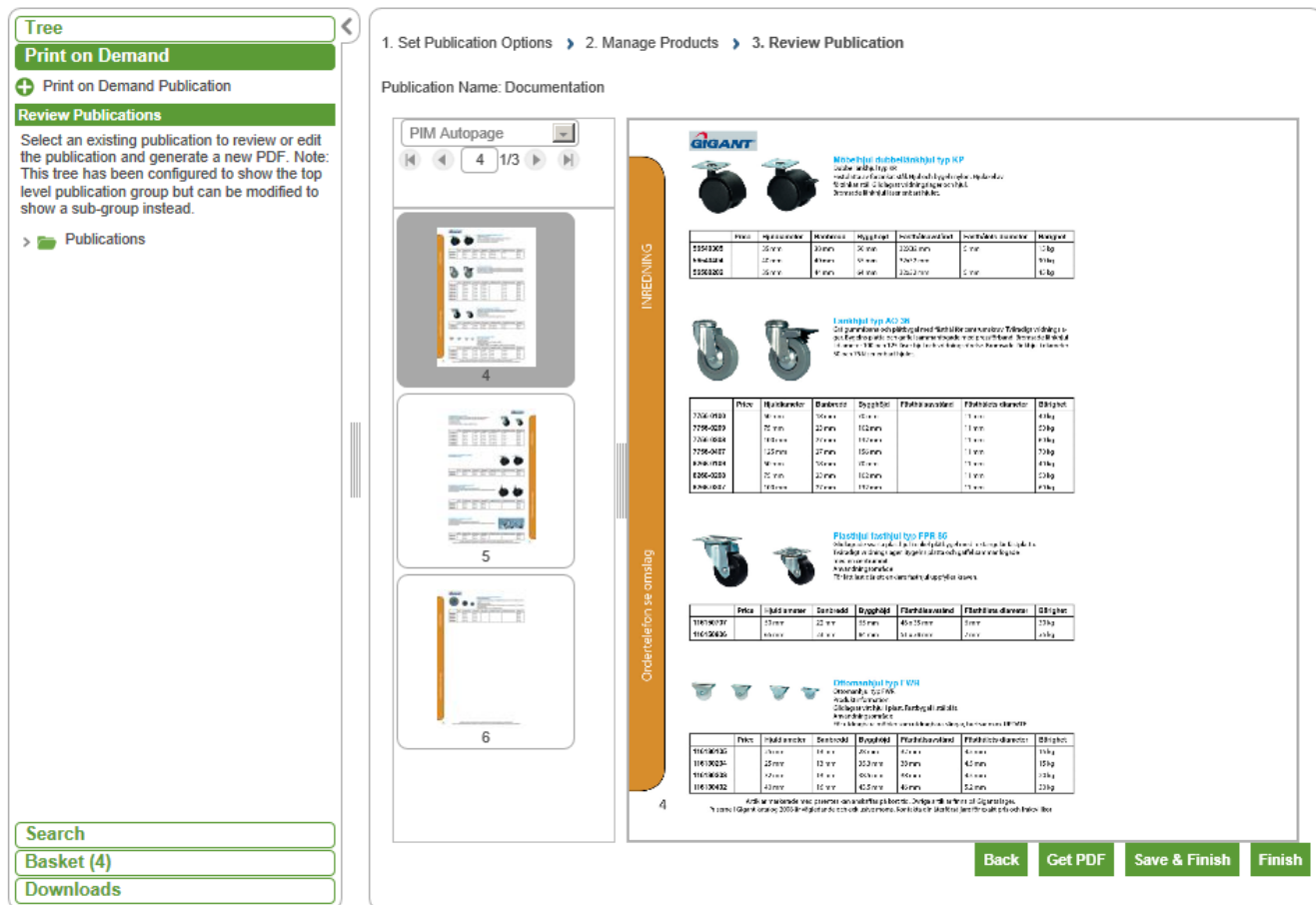
Items can be removed from the list to be paginated by selecting item(s) from the item list and then selecting “Remove Items”.

To change the order of the items in the pagination list, select the items you wish to move up or down the list and then select “Move Up” or “Move Down”

Once items have been added to you publication, the “Next” button will become enabled. Pressing this will take you to the next step of the wizard.

To go back to the previous stage of the wizard, press the “Back” button.

Review Publication



In this step of the wizard you can review the publication, retrieve a PDF of the publication and save it.

To review a page of the publication, choose a version to review from the Version dropdown and then choose a page to review by either typing a page number into the page number field or using the left and right arrow page navigator icons or selecting the page thumbnail in the left hand column. A JPEG of the selected page is shown on the right hand side of the screen. This preview can be zoomed in and out by placing the cursor over the image and scrolling the mouse wheel.

To retrieve a PDF of the publication, select the “Get PDF” button.

The publication can be saved by selecting the “Save & Finish” button or can be discarded by selecting the “Finish” button. Selecting “Save & Finish” will display a tree browser from which the user can select where in the publication hierarchy to save the publication. Pressing either of the “Save & Finish” or the “Finish” button will take the user back to the portal home page.

To go back to the previous stage of the wizard, press the “Back” button.

Review a saved Print on Demand Publication

Tree

Print on Demand

Print on Demand Publication

Review Publications

Select an existing publication to review or edit the publication and generate a new PDF. Note: This tree has been configured to show the top level publication group but can be modified to show a sub-group instead.

- Publications
 - Auto Test Publications
 - Customer Cases
 - Market Publishing Group
 - Module Mount
 - Print on Demand
 - PortalPublications
 - Documentation
 - PortalPublicationTypes
 - PrintOnDemand_AutoTest
 - Stibo Area
 - Top Publication

Search

Basket (4)

Downloads

1. Set Publication Options 2. Manage Products 3. Review Publication

Publication Name: Documentation

PIM Autopage

4 1/3

4

5

6

INFEENING

Orderreflex se omslag

4

GIANT

Minibjelt dubbeltrådet typ KP
 roller med typ 60
 med 2 ruller i en rull med 2 typer roller. Hjulene
 i rullen er 2 i en rull med 2 typer roller.
 1 rulle med 2 typer roller.

Pris	Hjul diameter	Roller diameter	Hjul bredde	Roller bredde	Roller diameter	Roller bredde
1151303	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
1151304	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
1151305	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm

Levtrådet typ AG 28
 28 paraboliserede roller i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller.

Pris	Hjul diameter	Roller diameter	Hjul bredde	Roller bredde	Roller diameter	Roller bredde
7704-0101	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
7704-0102	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
7704-0103	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
7704-0104	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
7704-0105	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm

Flasktrådet typ FFR 60
 60 paraboliserede roller i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller.

Pris	Hjul diameter	Roller diameter	Hjul bredde	Roller bredde	Roller diameter	Roller bredde
1151307	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
1151308	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm

Omslagtrådet typ I WS
 28 paraboliserede roller i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller. Hjulene i rullen er 2 i en rulle med 2 typer roller.

Pris	Hjul diameter	Roller diameter	Hjul bredde	Roller bredde	Roller diameter	Roller bredde
1151309	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm
1151310	35 mm	30 mm	50 mm	30 mm	30 mm	50 mm

Back

Get PDF

Save & Finish

From the Review Publications section of the Print on Demand tree, browse to the publication you wish to review and select it. This will display the publication in Step 3 (Review Publication) of the Print on Demand wizard.

From here you can choose to “Get PDF” for the publication which will retrieve a PDF of the publication or you can modify the publication by choosing the “Back” button to take you to the previous steps of the wizard. The “Save and Finish” will save any changes that have been made to the publication and take the user back to the portal home page.

Creating a New Print on Demand Publication based on an Existing Publication

Selecting an existing publication to review and then selecting the “+” icon to create a new Print on Demand Publication will pre-populate the item collection in Step “2 Manage Products” of the Create New Publication wizard with the items that were in the originally selected existing publication. This allows the user to create a new publication based on an existing publication.

Print on Demand Configuration Options

The Print on Demand portal has various configuration options that are available to the Portal Designer. The key configuration options are listed here. Please view the Print On Demand portal in Design Mode for further options.

Properties

Configuration Portal style

Save Close New... Delete Rename Save as...

PrintOnDemand

PrintOnDemand properties

Component Description

A component for getting a PDF of a selection of products based on a Publication Type. Component is experimental and subject to change, use with care

Component status

BackButtonCssClass

BackButtonText

Back

EmailPDFMessage

PDF will be emailed to {0}

EmailPDFToUser

☐

FetchPDFProgressMessage

Fetching PDF ...

FinishButtonCssClass

FinishButtonText

Finish

ManageProductsStepLabel

2. Manage Products

NextButtonCssClass

NextButtonText

Next

PDFButtonCssClass

PDFButtonText

Get PDF

PDFProfile

PaginationProgressMessage

Creating publication "{0}" using temp

PublicationNameLabel

Publication Name:

PublicationTemplateGroup*

PortalPublicationTypes

ReviewPublicationStepLabel

3. Review Publication

SaveAndFinishButtonCssClass

SaveAndFinishButtonText

Save & Finish

SavePublicationRoot

SetPublicationOptionsStepLabel

1. Set Publication Options

StartPageDefaultValue

1

StartPageLabel

Start on Page:

TempPublicationGroup*

PortalPublications

TemplateLabel

Template:

showReviewPublicationWizardStep

☐

showSaveOption

☒

showTemplatePreviews

☒

Child components

NodeList

NodeList

go to component

Properties

Configuration Portal style

Save Close New... Delete Rename Save as...

PrintOnDemand

NodeList properties

Component Description

Shows a list of nodes in one or several display modes. A detail panel can be added to the display modes for showing editors for the selection.

AssetSelectionScreen

<Select a screen>

Add

ClassificationSelectionScreen

<Select a screen>

Add

ClearSelection

Clear Selection

EmptySelectionScreen

<Select a screen>

Add

EnableDefaultSorting

☒

EntitySelectionScreen

<Select a screen>

Add

HideSelectionButtons

☐

ID *

PODNodeList

LookupScreenTypeForNavigation

☒

MultiSelectHelpText

Multi Selection Screen

<Select a screen>

Add

ObjectTypeScreenMapping

Add... Edit... Remove

Up Down

Page Size

25

ProductSelectionScreen

<Select a screen>

Add

SelectAllLabel

Select All

ToolbarHeight

30

Child components

DisplayModes

TableDisplayMode

GalleryDisplayMode

FilmStripDisplayMode

Add... Remove Up Down

Actions

AddPrintOnDemandItemsAction

RemovePrintOnDemandItemsAction

MoveItemsAction

MoveItemsAction

Add... Remove Up Down

Email PDF to User

If set, selecting "Get PDF" will email the PDF to the user instead of returning it directly to the browser. The default setting is to return the PDF directly to the user.

Show Review Publication Wizard Step

This controls whether Step "3 Review Publication" is shown as part of the Print on Demand wizard.

Show Template Previews

This controls whether Template Previews are shown in Step “1 Set Publication Options” of the Print on Demand wizard.

Tree

- Image Hierarchy
- Primary Product Hierarchy
- Publications
 - Auto Test Publications
 - Customer Cases
 - Market Publishing Group
 - Module Mount
 - Print on Demand
 - PortalPublications
 - Documentation
 - PIM Autopage
 - Sub Section
 - Möbelhjul dubbellänkhu
 - Länkhjul typ AO 36
 - Plasthjul fasthjul typ FFI
 - Ottomanhjul typ FWR
 - Plastlänkhjul typ PP 06
 - Möbelhjul dubbellänkhu
 - Möbelhjul bromshjul typ
 - Hjul Lül Typ 36 NylonK
 - Transporthjul
 - 4-Sub Section
 - 6-Sub Section
 - PortalAutopageTypes
 - PrintOnDemand_AutoTest
 - Stibo Area
 - Top Publication

DTP Document

PIM Autopage

4

5

There are no notes for this page

Products Assets Notes Attribute

ID	Name	Spaced Used
BBtool_BB5457	Ottomanhjul typ FWR	4885.16 mm²
BBtool_BB5458	Möbelhjul dubbellänkhu typ KP	4136.69 mm²
BBtool_BB5459	Länkhjul typ AO 36	7647.19 mm²
BBtool_TT116130105	116130105	190.43 mm²
BBtool_TT116130204	116130204	197.31 mm²
BBtool_TT116130303	116130303	197.31 mm²
BBtool_TT116130402	116130402	197.31 mm²
BBtool_TT116150707	116150707	201.83 mm²
BBtool_TT116150806	116150806	201.83 mm²
BBtool_TT56540305	56540305	193.49 mm²

Print on Demand

Search

Basket (4)

Downloads

Note: It is also possible to review all actual pages within a publication or section. It require the Actual Page View functionality has been configured for these objects as well.

Proof View

To access the Proof View functionality, from the Tree on the left hand side, select a product then select the Proof tab.

EN All AllMainMy SettingsLogout

Tree

- Image Hierarchy
 - Primary Product Hierarchy
 - (SAAR - Product Group)
 - Automated Test Products
 - Customer Cases
 - Trafalgar
 - Patterson
 - Hach Lange
 - Minor-p401
 - AMTAX sc AMMONIA ANALYZER
 - 36115 -> AMTAX sc AMMONIA ANALYZER

Product Details

- Default Product Details
- References and Classifications
- Referenced By
- Images and Documents
- Proof

Publication: Hach Lange Pub (Hach Lange (master))Template: Template1

Set as defaultPDF

AMTAX sc AMMONIA ANALYZER WITH Filterprove sc UPDATE

- 5-minutes response time, including sample preparation
- Easy installation at the measurement point
- Plug-and-play with the sc1000 controller
- Low maintenance
- Optional Filterprobe sc available for Instu membrane filtration



The Hach AMTAX sc Ammonia Analyzer measures NH₄-N concentrations as low as 0.05 mg/L and as high as 1000 mg/L. When a fast, 5-minute response time, it enhances control of the nutrient removal process. This is a "black box" system - you get transparent, high quality measurements for reliable values djdj

Article No.	Description	Price
6157300	AMTAX sc Ammonia Analyzer 0.05 to 20 mg/L, 115 Vac; includes filtration probe with 10 m heated hose	15889.00
6157200	AMTAX sc Ammonia Analyzer 0.05 to 20 mg/L, 115 Vac; includes filtration probe with 5 m heated hose	15235.00
6157900	AMTAX sc Ammonia Analyzer 10 to 1000 mg/L, 115 Vac; includes filtration probe with 10 m heated hose	15886.00
6157800	AMTAX sc Ammonia Analyzer 10 to 1000 mg/L, 115 Vac; includes filtration probe with 5 m heated hose	15232.00
6158500	AMTAX sc Ammonia Analyzer 1 to 100 mg/L, 115 Vac; includes filtration probe with 10 m heated hose	15883.00
6158400	AMTAX sc Ammonia Analyzer 1 to 100 mg/L, 115 Vac; includes filtration probe with 5 m heated hose	15235.00

For two-channel version of the AMTAX sc Ammonia Analyzer, please contact your Hach representative or call 1-800-227-4224

Print on Demand

Search

Basket (4)

Downloads

Save

Reset

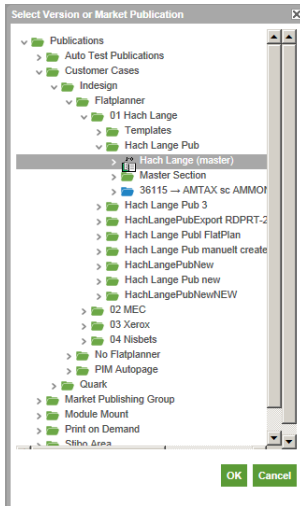
Approve

Delete

From here, the user can select a publication version to base the proof on by using the Publication Version “...” chooser.

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15



A template to use for the proof can be chosen from the Template dropdown.

Once a publication version and a template have been selected, a JPEG proof is automatically generated and is displayed in the centre of the screen. The JPEG proof can be zoomed in or out by placing the cursor over the image and using the mouse scroll wheel.

A PDF proof can be generated by selecting the PDF icon.

The user can set a template as the default template for the product selected in the tree by pressing the “Set as default” button.

Note: More of the proof view options can be hidden for the users, if the same selection are always used. For example, a publication version can be configured as default version and the user don't need to make that selection.

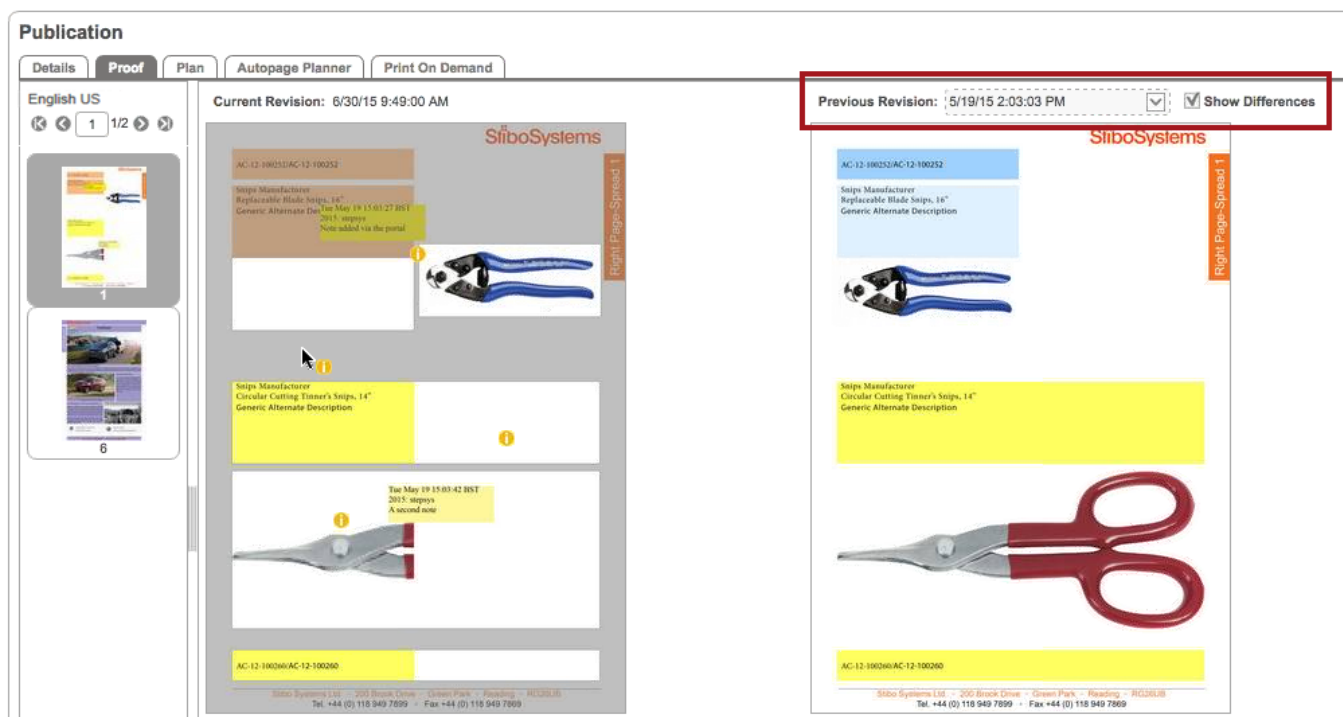
Page Revision Comparisons

Summary

The Publishing Web UI supports Revision Compare functionality for both Actual Pages and Flatplanner Planned Page spreads. This allows end users to easily compare page revisions by highlighting where changes have occurred.

Details

The 'Revision Compare' toolbar enables viewing of the latest page revision on the left half of the screen and a previous revision on the right. The previous revision to compare to can be selected from the Previous Revision dropdown and differences can be highlighted by selecting the 'Show Differences' checkbox. This will result in the differences being highlighted on the latest revision while areas that have not changed are grayed out.

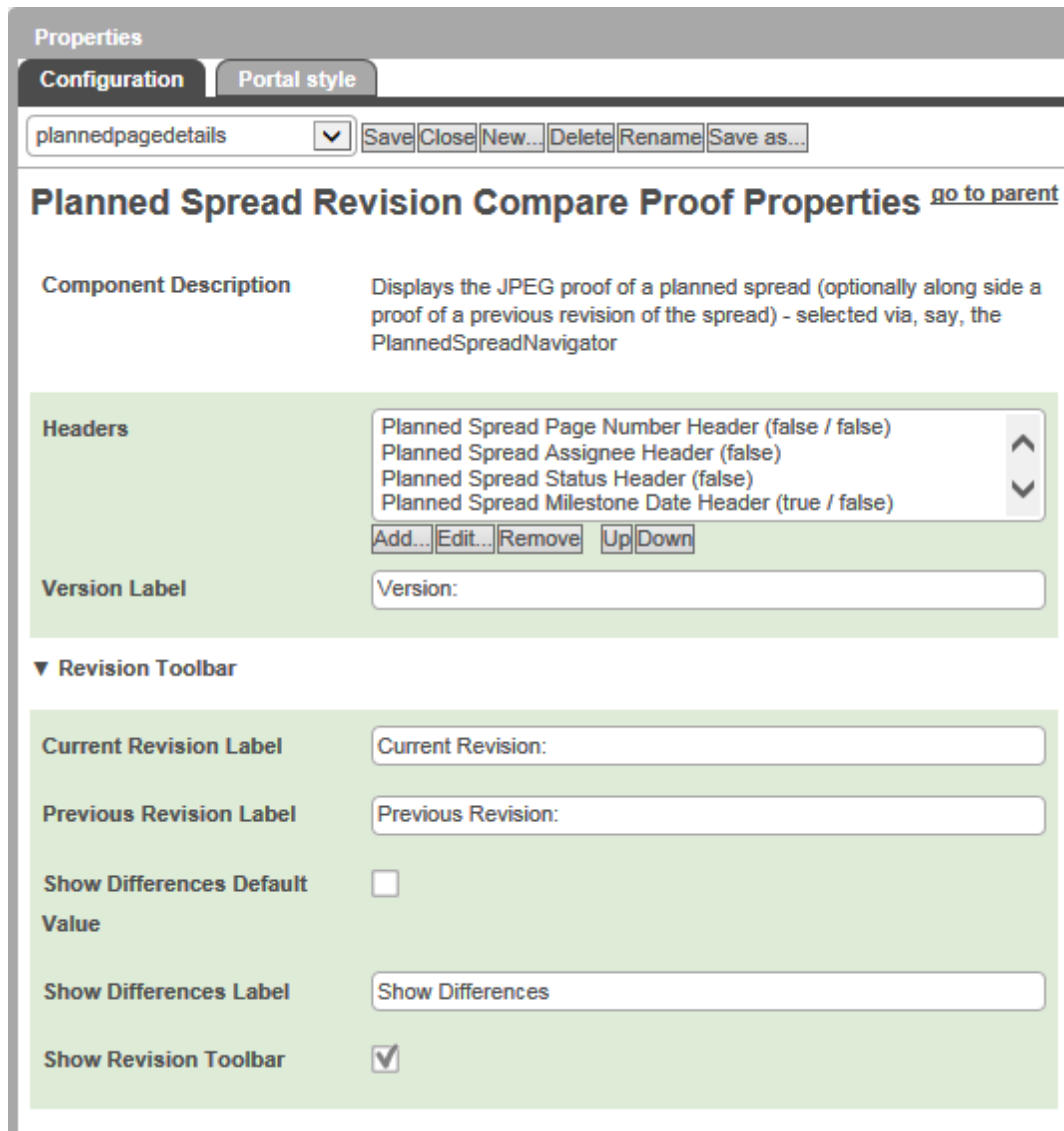


The system determines the differences between the two pages by looking at textual content changes and differences in space usage data. Text changes are highlighted whether the changes are made 'freehand' on mounted pages or if they originate from attribute value changes in STEP.

The Revision Compare functionality is available in the Publishing Web UI in the following components:

- Actual Page Revision Compare Proof
- Planned Spread Revision Compare Proof
- Planned Spread Revision Compare In Workflow

The Show Revision Toolbar option must be checked to enable the new functionality. If the box is not checked, the Revision Toolbar is not displayed and only the most recent page revision is visible.



Properties

Configuration | **Portal style**

plannedpagedetails ▼ Save Close New... Delete Rename Save as...

Planned Spread Revision Compare Proof Properties [go to parent](#)

Component Description Displays the JPEG proof of a planned spread (optionally along side a proof of a previous revision of the spread) - selected via, say, the PlannedSpreadNavigator

Headers

- Planned Spread Page Number Header (false / false)
- Planned Spread Assignee Header (false)
- Planned Spread Status Header (false)
- Planned Spread Milestone Date Header (true / false)

Add... Edit... Remove Up Down

Version Label Version:

▼ **Revision Toolbar**

Current Revision Label Current Revision:

Previous Revision Label Previous Revision:

Show Differences Default Value ☐

Show Differences Label Show Differences

Show Revision Toolbar ☒

For more information on Flatplanner Planned Page spreads and Actual Pages see the **Overview of the Flatplanner User Interface** section of the **Flatplanner** documentation.

Considerations and Limitations

- As of STEP 7.4, the Actual Page Revision Compare Proof, Planned Spread Revision Compare Proof, and Planned Spread Revision Compare In Workflow Web UI components automatically replace the previous Actual Page Proof, Planned Spread Proof, and Planned Spread In Workflow components.
- Planned pages must be mounted in InDesign and saved back to STEP before the Revision Compare functionality is enabled. Content changes to unmounted Planned Pages, e.g., replacing the content of a Flatplan frame, will not be highlighted as revisions.

- Users who have both a Flatplanner and Web UI license may compare revisions of mounted pages both from the Planned Spread Navigator and from the Actual Page Navigator in the Web UI. Users with a standard STEP Publisher (STEP'n'design) license can compare revisions of mounted pages from the Actual Page Navigator only.
- Though the Revision Compare feature highlights changes in textual content, this feature is primarily designed to highlight differences in space usage between the two revisions. It does not highlight changes in images, frame colors, paragraph styles, or layouts if the space usage remains the same.

Working with Commercial Data in the Publishing Web UI

Commercial data (commercial terms lists) may be imported, viewed, and edited in the Publishing Web UI.

This is accomplished by adding the **Commercial Terms Editor** component to the Node Editor for publication objects. Available as a Node Editor child component, the Commercial Terms Editor is intended to use only on Node Editor configurations used to work with publication objects.

The screenshot displays the 'Publication' web UI. On the left is a 'Tree' panel showing a hierarchy: 'Print on Demand' > 'Print on Demand Publication' > 'Review Publications' > 'Publications' > 'Templates' > 'Standard Publications' > 'Autopage Publications' > 'Flatplanner Publications' > 'Spring Wedding Catalog' > 'Halloween Catalog' > 'Christmas Catalog' > 'New Publication' > 'Acme Party Supplies' (selected). The main area shows the 'Commercial Data' tab for the 'Acme Party Supplies' publication. It includes fields for 'Select Commercial List' (Acme Party Winter Retail Pricing), 'ID' (AcmePartyWinter), 'Object Type' (Price), 'Default Unit' (\$ (iso4217.unit USD)), 'Default Start Date' (2015-12-25 16:26:14), 'Default End Date' (yyyy-MM-dd HH:mm:ss), 'Expiry Date' (2015-12-17 16:25:25), and 'Immutable' (checkbox). Below these is a 'Product' dropdown set to 'Cosmic Party Hat (121177)'. A table lists commercial data terms:

ID	Value	Unit	Min Quantity	Max Quantity	Start Date	End Date
121177	\$3.99	\$ (iso4217.unit USD)	1	12	2015-12-25 16:26:14	2016-03-25 00:00:00

At the bottom are buttons: 'Reset', 'Save', 'Delete', and 'Import Commercial Terms'.

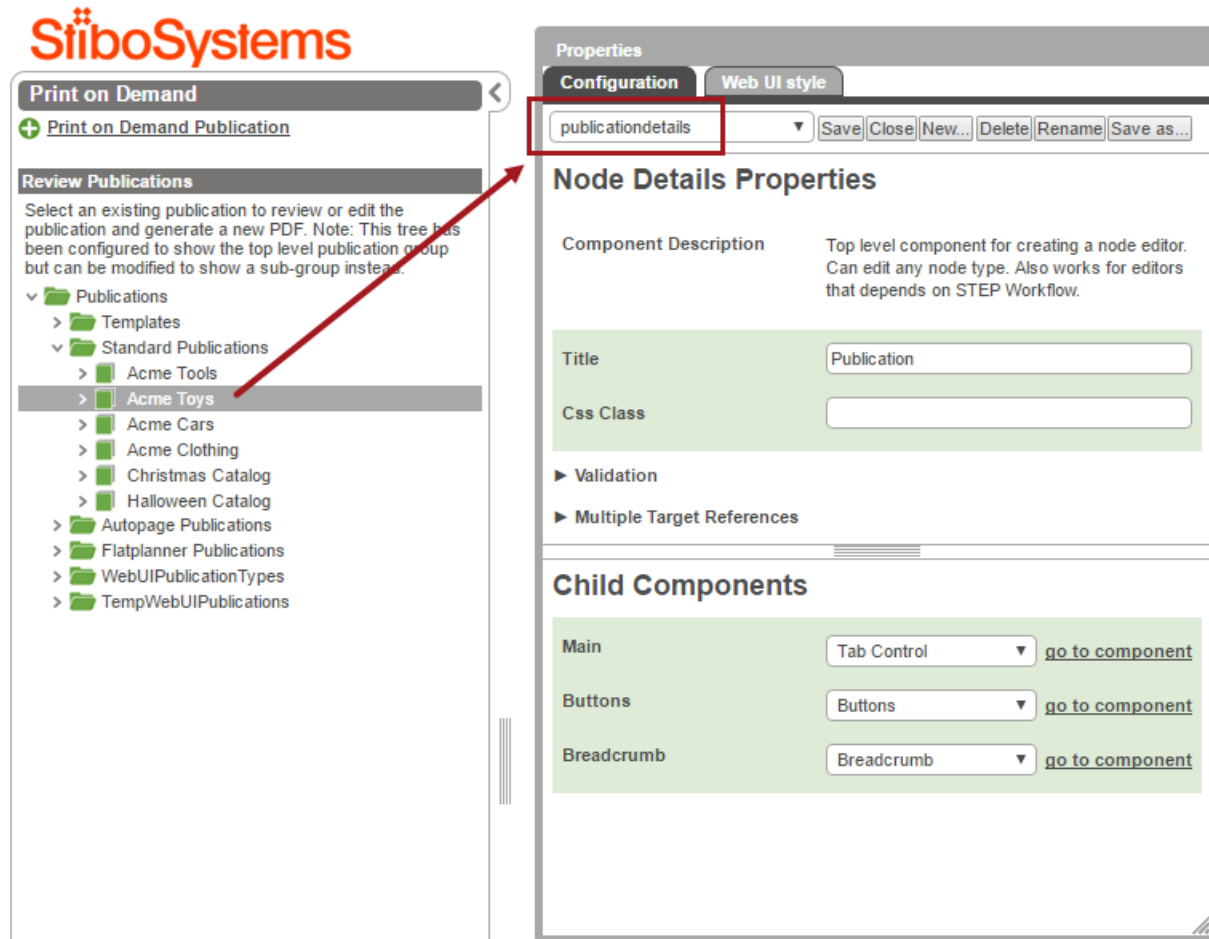
Visible term fields for commercial data lists in the Web UI are the same as those in the workbench: Value, Unit, Min Quantity, Max Quantity, Start Date, and End Date.

The following sections of this topic explain how to configure, import, and edit commercial data terms lists in the Publishing Web UI.

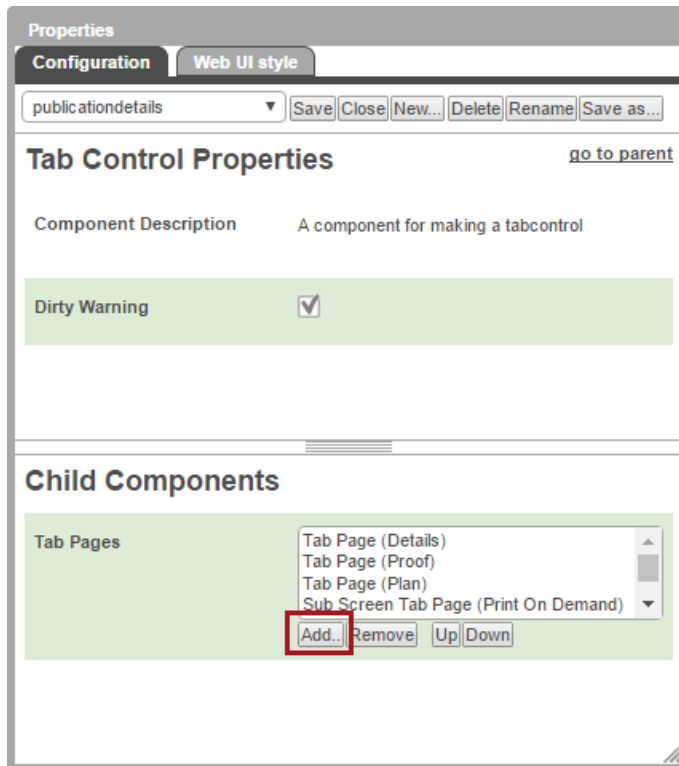
Configuring the Commercial Data Component in Web UI

Follow these steps to configure the commercial data terms lists component in the Publishing Web UI:

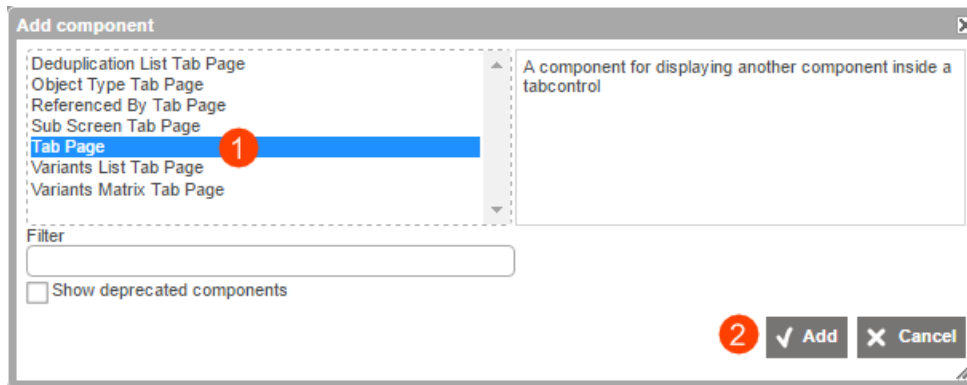
1. In your Publishing Web UI, navigate to a publication object in the publication hierarchy.
2. With the publication object selected, enter design mode.
3. In the dropdown list that appears in the upper left corner of the Web UI Designer, the screen ID for the Node Details screen created for publication objects should already be selected. In this example, this screen is named **publicationdetails**.



4. In Child Components > Main, make sure that **Tab Control** is selected. Click 'go to component.' The Tab Control component appears in the designer.
5. Under Child Components > Tab Pages, click **Add**.



6. In the **Add component** dialog that displays, select **Tab Page**, then click **Add**.



7. Double click on the newly created tab page in the Tab Pages list. **Tab Page Properties** displays.
8. In the Title field, add a descriptive title that should appear on the new tab (for example, Commercial Data). Select **Vertical Panel** as the Tab Content child component.

Properties (edited)

Configuration Web UI style

publicationdetails Save Close New... Delete Rename Save as...

Tab Page Properties [go to parent](#)

Component Description A component for displaying another component inside a tabcontrol

Lazy ☐

Title **1** Commercial Data

Child Components

Tab Content **2** Vertical Panel [go to component](#)

9. Click 'go to component' to display **Vertical Panel Properties**.
10. In Child Components > Rows, click **Add**.
11. In the **Add component** dialog, select **Commercial Terms Editor**, then click **Add**.

Child Components

Rows

1 Add... Remove Up Down

Add component

Classification Links
Classification Product Links
Clear Basket Function
Columns Control
Commercial Terms Editor **2**
Completeness Meter
Confirmed Matches
Confirmed Non Matches
Data Profile Approval Status Widget
Filter

A screen for viewing and editing Commercial Terms Lists for a Publication

☐ Show deprecated components

3 Add Cancel

12. Double click the **Commercial Terms Editor** component to open **Commercial Terms Editor Properties**.

Properties - Configuration Saved!

Configuration Web UI style

publicationdetails Save Close New... Delete Rename Save as...

Commercial Terms Editor Properties [go to parent](#)

Component Description A screen for viewing and editing Commercial Terms Lists for a Publication

Commercial List Object Types

Add... Remove Up Down

Valid Units

Add... Remove Up Down

Show Unit Header ☒

Show Min Quantity Header ☒

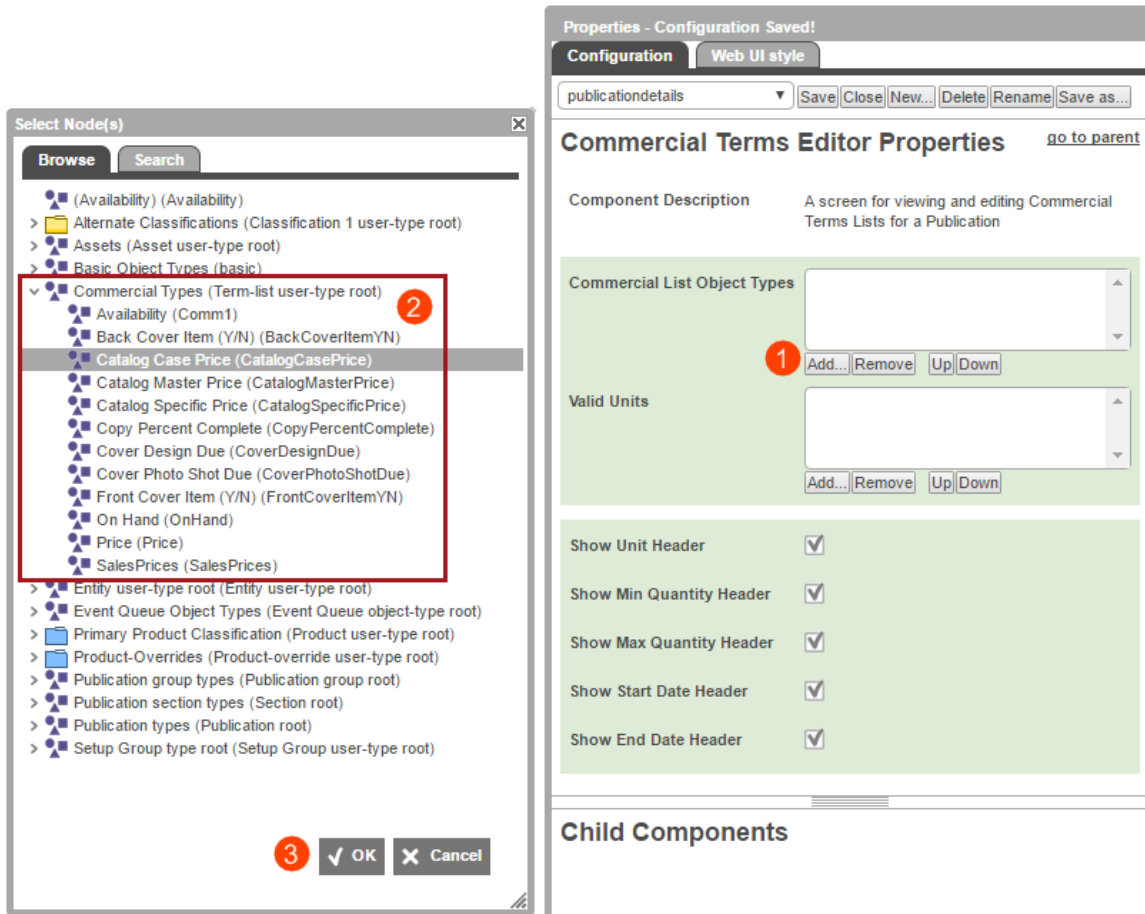
Show Max Quantity Header ☒

Show Start Date Header ☒

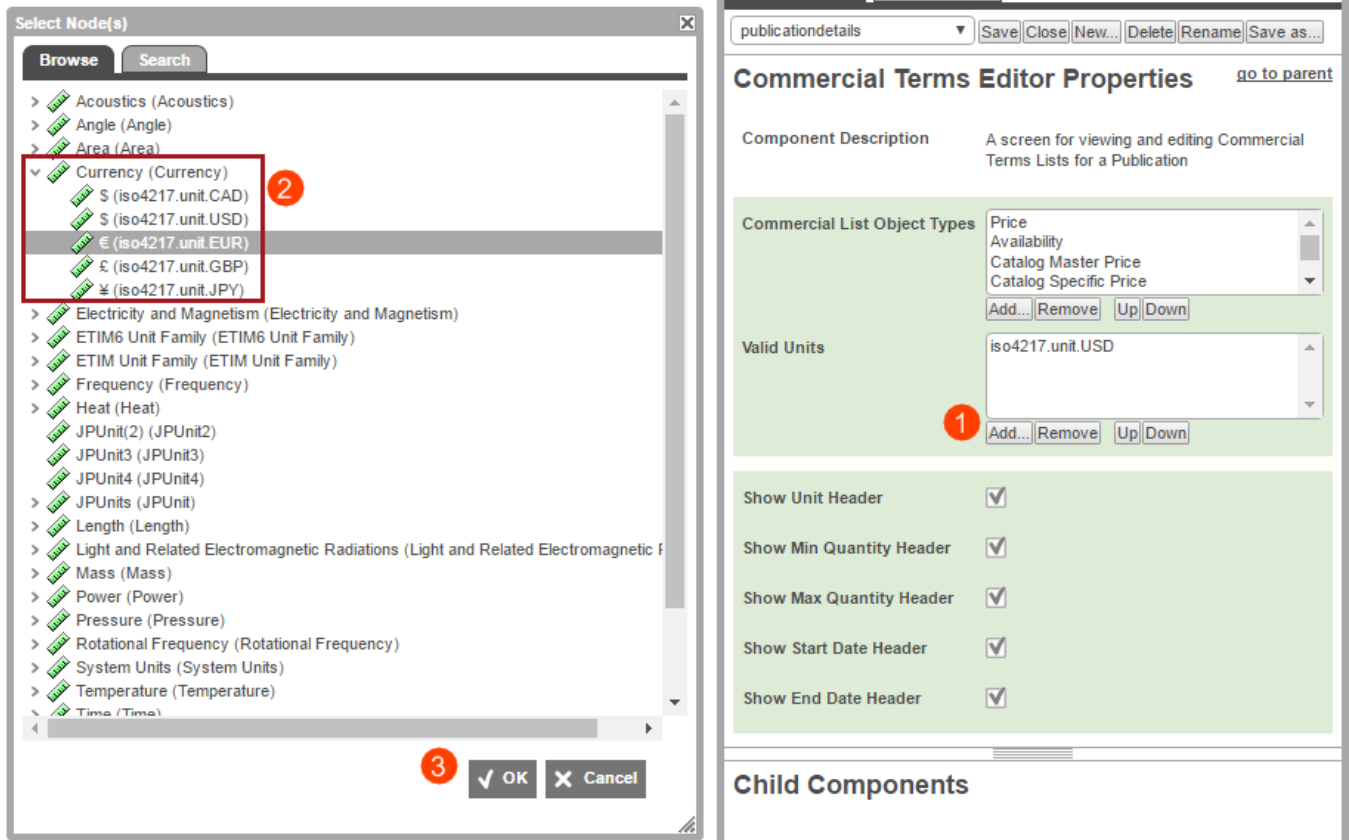
Show End Date Header ☒

Child Components

13. Click the **Add** button in the **Commercial List Object Types** section. The **Select Node(s)** dialog displays.
14. Select the commercial data object type(s) that should be valid in the commercial terms editor. Multiple commercial types may be selected at once by pressing Ctrl or Shift while making selections. Click **OK** when finished.



15. Click the **Add** button in the **Valid Units** section. The **Select Node(s)** dialog displays.
16. Select the unit(s) that should be valid in the commercial terms editor. Multiple units may be selected at once by pressing Ctrl or Shift while making selections. Click **OK** when finished. (Units used in commercial data are typically currency units.)



17. Check the relevant boxes beneath the Valid Units area to configure which headers should display in the commercial data table on the Commercial Terms Editor screen.

ID	Value	Unit	Min Quantity	Max Quantity	Start Date	End Date
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18. Click the **Save** and **Close** buttons at the top of the designer to save your configurations and close the designer.

Importing Commercial Data in Web UI

Commercial data may be imported in the Web UI by using Excel spreadsheets containing the commercial terms information for products in the selected publication.

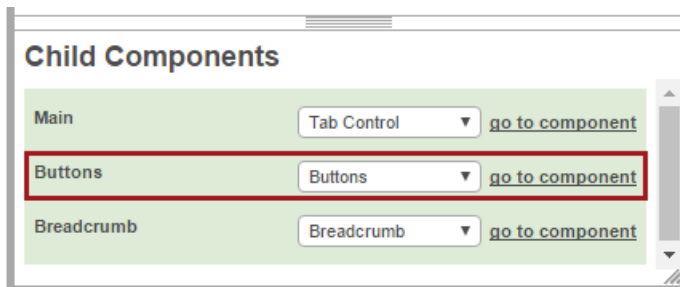
Note: Before commercial data can be imported into a publication in the Web UI, at least one import configuration for commercial data must have already been created on the publication in the workbench. See the **Defining Import Settings for Commercial Data** section of the **Commercial Data** documentation for information on how to configure import configurations for commercial data in the workbench.

The import process is accomplished by using the **Import Commercial Terms** button on the **Publication Node Editor** screen.

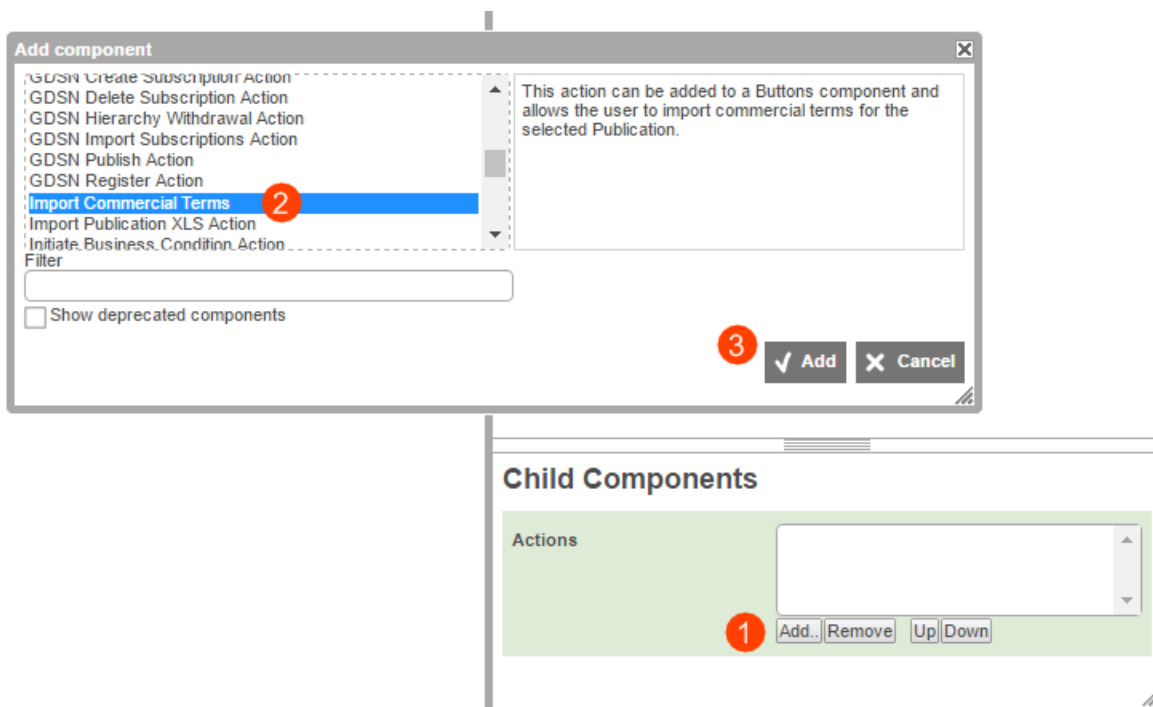
Import Commercial Terms

To add this button to your screen, follow these steps:

1. Navigate to **Node Details Properties** in the designer by following steps 1 - 3 in the previous section of this topic.
2. In the **Child Components** section, select **Buttons** in the Buttons dropdown list, then click 'go to component.'



3. The **Buttons Properties** component displays in the designer. In the **Child Components** area, click the **Add** button. In the **Add component** dialog that displays, select **Import Commercial Terms** from the dropdown list. Click **Add** to close the dialog.



4. Click the **Save** and **Close** buttons at the top of the designer to save your configurations and exit design mode.
5. The **Import Commercial Terms** button is now added at the bottom of the screen.

Note: The Import Commercial Terms button is not activated unless you have selected a publication in the Tree area that has at least one import configuration already defined in the workbench.

Importing the Commercial Data Spreadsheet

Follow these steps to import a spreadsheet containing your commercial terms information:

1. In the Tree area, navigate to the publication into which you would like to import your commercial terms spreadsheet, then navigate to the Commercial Data tab on the **Publication Node Editor** screen.
2. Click the **Import Commercial Terms** button. The **Import Commercial Terms** dialog displays.

3. If the publication has multiple import configurations, select the relevant configuration from the **Import Configuration** dropdown list.
4. Click the **Choose File** button to select the spreadsheet that you would like to import.
5. Select 'Replace entire existing list(s) with content of import file' to remove all contents of the existing list and replace those terms with the contents of the new sheet. Select 'Only update commercial data for objects included in import file' to add new terms and overwrite existing terms for products already on the list.
6. Click **OK** to close the dialog. A background process begins for the commercial terms list import.
7. When the background process successfully completes, the commercial terms are added to the commercial list.

Editing Commercial Data in Web UI

Once commercial terms have been imported into the commercial data list(s) connected to your publication, both the terms values and configurations of the lists themselves can be edited in the Web UI.

To edit configurations for commercial terms lists in the Web UI, follow these steps:

1. In the Tree area, navigate to the publication that contains the commercial terms that you would like to edit.
2. Navigate to the Commercial Data tab on the **Publication Node Editor** screen, then select the relevant commercial data terms list from the **Select Commercial List** dropdown. The **ID** and the **Object Type** of the list will automatically display.

Publication

Publications > Standard Publications > Acme Tools

Details

Proof

Plan

Print On Demand

Commercial Data

Select Commercial List:

Acme Tools Spring Pricing

ID:

AcmeToolsSpringPricing

Object Type:

Price

Default Unit:

Default Start Date:

yyyy-MM-dd HH:mm:ss

Default End Date:

yyyy-MM-dd HH:mm:ss

Expiry Date:

yyyy-MM-dd HH:mm:ss

Immutable:

3. In the **Default Unit** field, choose the default unit from the dropdown list. (This list is populated by the valid units that were selected when the **Commercial Terms Editor Properties** screen in the Web UI designer was configured.)

4. For **Default Start Date**, **Default End Date**, and **Expiry Date**, either click in the field and select a date from the popup date picker or manually enter a date that matches the ISO date / time format of **yyyy-MM-dd HH:mm:ss**.

5. Check the **Immutable** box to make the values of the terms list uneditable by any user.

Editing Terms

To edit the values of terms lists, follow these steps:

1. Click the node picker button to the right of the **Product** (product search) field to locate a product in your commercial list.

Product:

ID

Value

Unit

Min

2. In the **Select Product** dialog that displays, either browse to or search for the relevant product, then click **OK**. Note that only one product at a time may be selected.

3. The product displays in the commercial data table.

Product:

Torque wrench (42304)

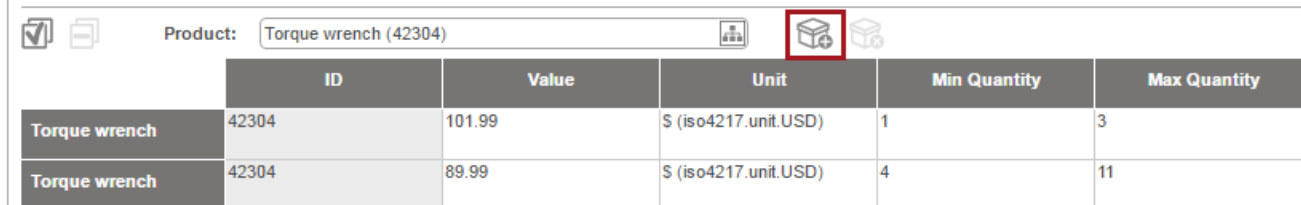
	ID	Value	Unit	Min Quantity	Max Quantity	Start Date	End Date
Torque wrench	42304	101.99		1	3		

4. Contents of the **Value**, **Min Quantity**, and **Max Quantity** fields are typed. The value for **Unit** is chosen from a dropdown list (which contains the valid units that were selected when the **Commercial Terms Editor**

Properties screen in the Web UI designer was configured).

The values for **Start Date** and **End Date** can be typed or chosen from a date picker. To view a sample of the required ISO format for the date field(s), select the field and double click. To access the date picker, select the field and triple click.

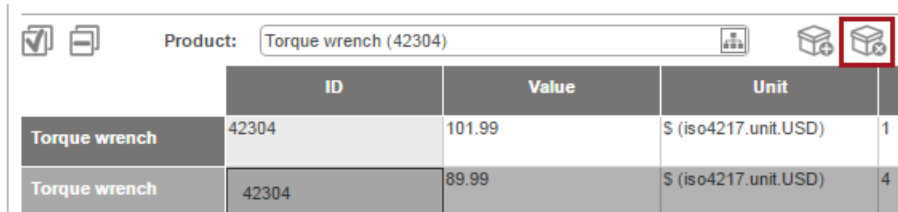
- To add an additional term for the product, click the add terms icon. An additional term may be needed, for example, to add an additional price for a price break.



The screenshot shows the 'Properties' screen for a product named 'Torque wrench (42304)'. The 'Add Terms' icon (a cube with a plus sign) is highlighted with a red box. Below the product name is a table with the following data:

	ID	Value	Unit	Min Quantity	Max Quantity
Torque wrench	42304	101.99	\$ (iso4217.unit.USD)	1	3
Torque wrench	42304	89.99	\$ (iso4217.unit.USD)	4	11

- To remove terms, select the row(s) containing the unwanted term(s), then click the remove terms icon. Rows may be multiselectable either by pressing Ctrl or Shift while making selections or by checking the 'select all' icon in the upper left (to the left of the product search field).



The screenshot shows the 'Properties' screen for a product named 'Torque wrench (42304)'. The 'Remove Terms' icon (a cube with a minus sign) is highlighted with a red box. Below the product name is a table with the following data:

	ID	Value	Unit	
Torque wrench	42304	101.99	\$ (iso4217.unit.USD)	1
Torque wrench	42304	89.99	\$ (iso4217.unit.USD)	4

- Click the **Save** button at the bottom of the screen to save all changes. Automatic saving while performing edits of commercial terms is not possible in the Web UI.

Limitations and Considerations

- Terms may be viewed and edited for only one product at a time in the Web UI.
- The toolbar is not configurable. Select / deselect all, product search, and add / remove terms are always shown.

For More Information

For information on how to configure import configurations for commercial data in the workbench, see the **Defining Import Settings for Commercial Data** section of the **Commercial Data** documentation.

For general information on commercial data in STEP, see **About Commercial Data** in the **Commercial Data** documentation.