

# USER GUIDE

The logo for StiboSystems, featuring the company name in a white sans-serif font with a small crown-like icon above the 'i' in 'Stibo'. It is positioned on a large orange triangle that points to the right, which is part of a larger graphic element on the left side of the page.

StiboSystems

STEP Trailblazer

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# Introduction

## How to Use this Guide

This user guide is intended to have the minimum amount of information needed to allow a user to maintain product data and assets. It does not contain any advanced functionality such as attribute creation, workflow management, or translations.

## Options and Licenses

There are a variety of options and licensed components available for the STEP system. This user guide may make reference to one or more of those components. If your system does not behave in the same manner as described in this user guide, you should first check to make sure that you have that option available in your system.

## What is meant by “product database”?

Generally, a product database is a medium in which product data is stored and maintained. Stibo’s product database is called the Product Information Manager (PIM).

The PIM is a dynamic tool for maintaining product information. Information about almost any type of element can be stored in the PIM through the use of specification and description attributes. There are functions to increase data integrity and efficiency, such as validation routines. The PIM also allows information to be stored that is context-dependent, such as

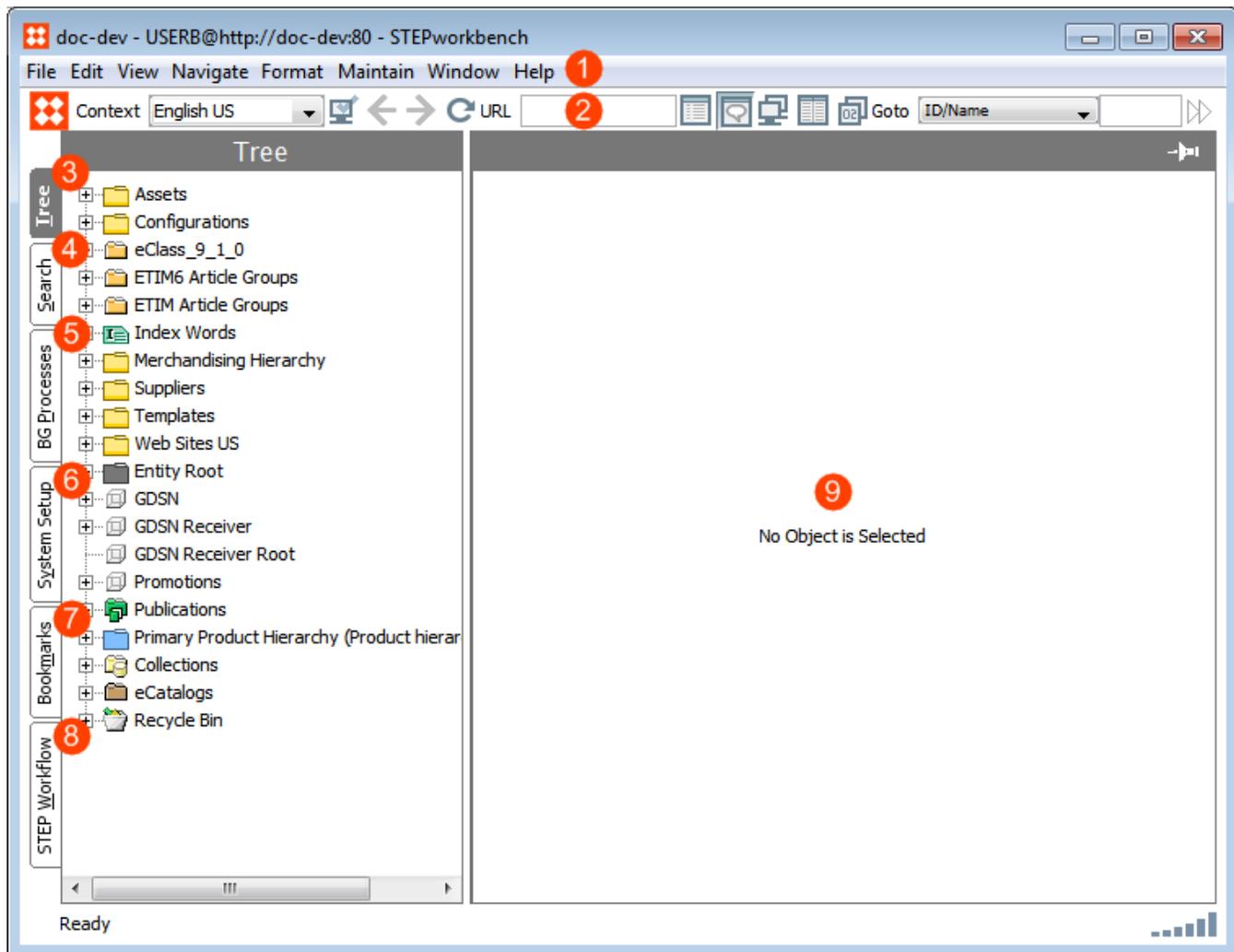
## Getting Started with the STEP Workbench

This section introduces some of the basic concepts and general functionality of the STEP Workbench. STEP users of all expertise-levels will benefit from reading the topics listed in this section as they provide foundational information about how STEP users populate and maintain data in STEP. This section also features a visual guide to the STEP Workbench interface, using annotated screenshots to show where and how the various functions are performed.

## Main Window in STEP Workbench

The screenshot below shows a basic view of the STEP Workbench. Though system customizations and variable access permissions may result in a slightly different view, the basic elements appearing in this view of the workbench's Main Window will be present for most users. Nine of those basic elements are numbered in the screenshot below and labeled in the list appearing below the screenshot. Each item is covered in detail in separate topics.

### Main Window - Basic Elements

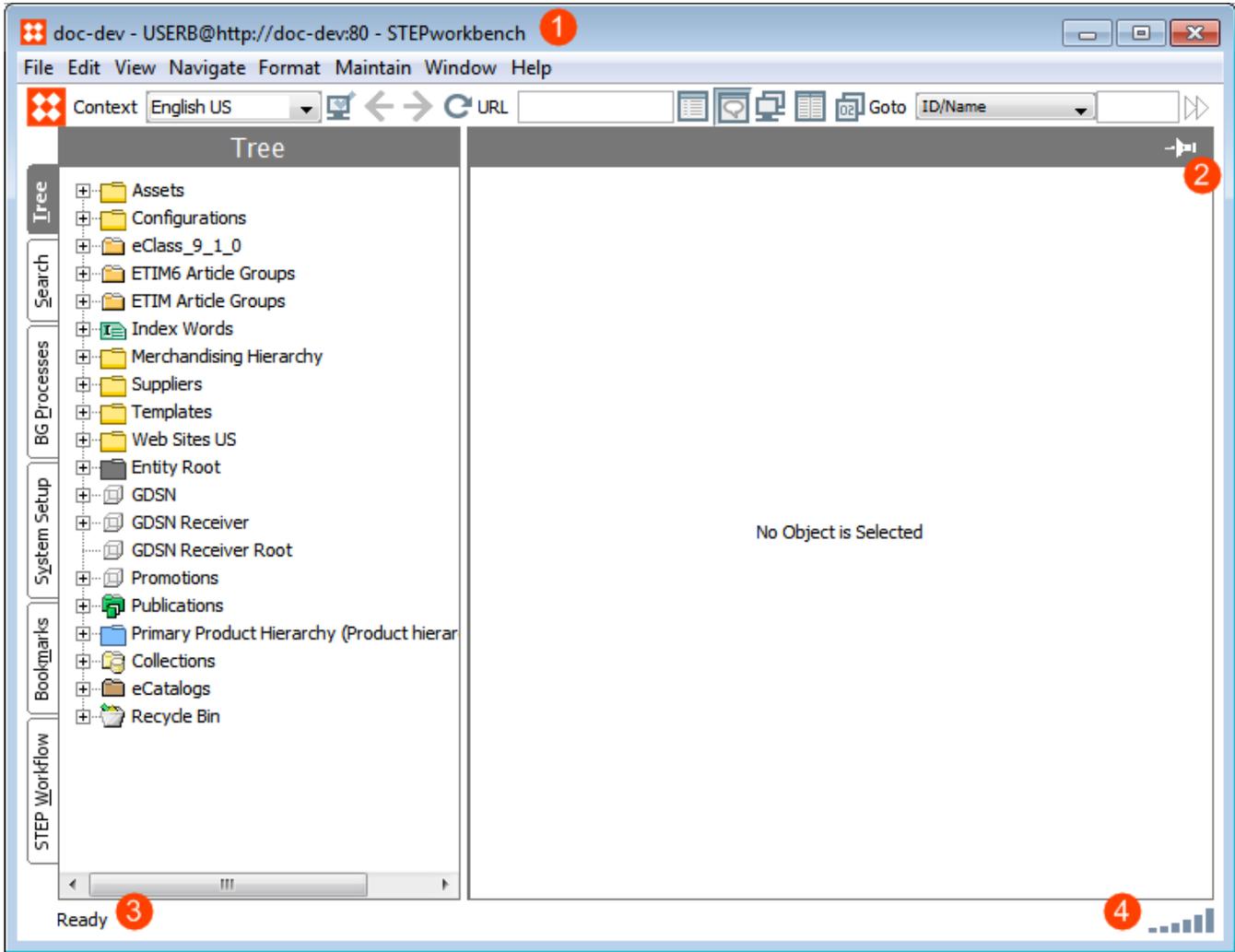


1. [Menu Items](#)
2. [Toolbar](#)
3. [Tree Tab](#)

- 4. Search Tab
- 5. Background Processes Tab
- 6. System Setup Tab
- 7. Bookmarks Tab
- 8. STEP Workflow Tab
- 9. Object Details

### Main Window - Other Elements

Other elements appearing in this view of the STEP workbench that are useful to understand but do not require their own topic are numbered in the screenshot below (a duplicate of the previous screenshot). An additional list appears below the screenshot that names these elements and provides additional information.



- 1. **System Information.** At the very top of the STEP window, important information about the user's STEP system is listed. The first element displayed is the name of the STEP system, then the user ID, followed by the

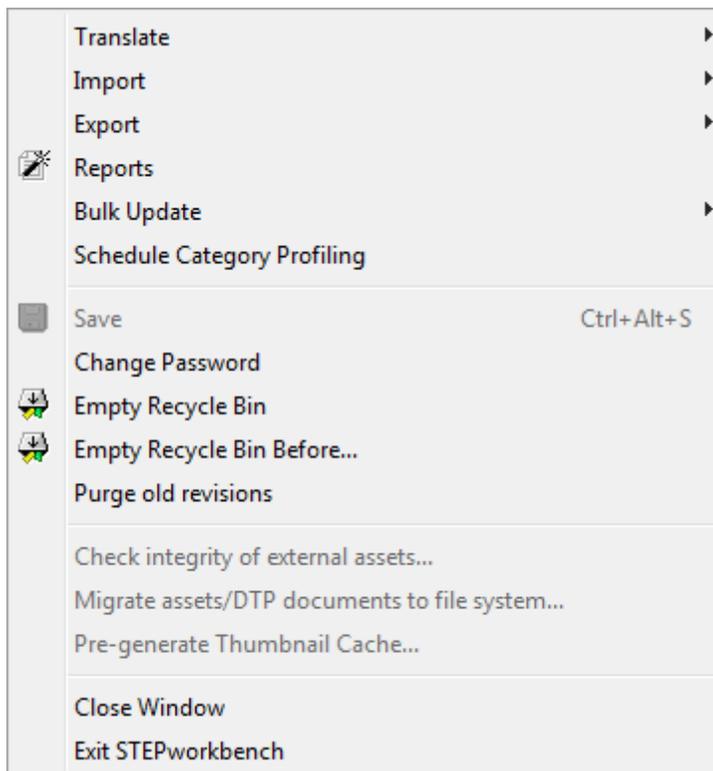
URL of the STEP system being accessed.

2. **Thumbpin.** Clicking this icon activates the "pin" which, when engaged, allows the user to navigate in the hierarchy (left panel) while keeping the object details displayed in the right panel static.
3. **STEP connection status.** Displays the status of STEP's connection to the internet. When the connection is strong and STEP is ready to run normally, the status will read 'Ready'. Other statuses that may appear are:
  - **Reading.** STEP is requesting information from the database.
  - **Lost Connection to.** STEP has lost connection to the server.
  - **Reconnected to.** STEP has reconnected to the server after a lost connection. May alternate with the **Lost Connection to** status if the connection to the internet is lost for a significant period of time.
4. **Connection strength.** A small graph illustrating the connection strength between the user and the server, also known as the 'Network Latency'. If a user hovers their cursor over the graph, a hover-over display will appear showing how fast data is traveling between the server and the user as measured in milliseconds.

## Menu Items

Listed below are all of the functions accessible via STEP's menu bar. Though many tasks central to using STEP can be accomplished with a right-click on an object and then selecting the desired option from a dropdown, some of the less frequently used functions are only accessible via the menu bar.

### File Menu



### Translate

Allows the ability to translate Products / Assets / Classifications in the Workbench and to import translations.

### Import / Export

Allows the ability to load data / images and documents / eCI@ss Classifications, GPC, ETIM, or to export data / images and documents. The user can also schedule imports and exports from their menu selections.

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**Note:** To import eCI@ss Classifications a license is required. For more information about eCI@ss, see STEPtrade User Guide.

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## **Reports**

Launches the Standard Reports and any custom data reports.

## **Bulk Update**

Allows the user to launch or schedule a Bulk Update.

## **Schedule Category Profiling**

Launches the Schedule Category Profiling dialog.

## **Save**

This allows the user to save any changes that are made within the Workbench.

## **Change Password**

During any session, any user may change their own password.

## **Empty Recycle Bin**

Contents of the Recycle Bin are permanently deleted when this function is selected. Can also be accessed by right-clicking on the Recycle Bin icon in the [Tree] tab.

## **Empty Recycle Bin Before**

Contents before a specified date are deleted from here.

## **Purge Old Revisions**

This is a global purge of revisions contained within a specified workspace.

## **Check integrity of external assets...**

This option is enabled on systems set up to store images in file system and not in the STEP database. If a Classification is selected the user can click this menu item to see if all images in the selected classification have been successfully migrated from the database to the file system.

## **Migrate assets to file system...**

This option is enabled on systems set up to store images in file system and not in the STEP database. If a Classification is selected, the user can click this menu item to migrate images stored in the database to the file system location.

## **Close Window**

This option closes the active window.

## **Exit STEPworkbench**

This will exit the STEP Content Manager completely by exiting all active windows.

## Edit Mode

	Undo	Ctrl+Z
	Redo	Ctrl+Shift+Z
	Cut	Ctrl+X
	Copy	Ctrl+C
	Paste	Ctrl+V
	Paste and Match Style	Ctrl+Shift+V
	Paste Link	Ctrl+L
	Select All	Ctrl+A
	Spelling	▶
	Asset	▶
	Edit Unique Key Values	
	Remove Row(s)	Ctrl+Minus
	Insert Row	Ctrl+Plus

### Undo

Undoes the last action of the user. Note: it does NOT undo character by character changes in text editors.

### Redo

Once an action is undone by selecting 'Undo', a user can then select 'Redo' to repeat the action.

### Cut

Standard 'cut' operation.

### Copy

Standard 'copy' operation. Note that if a folder is copied, the subfolders will NOT be copied.

### Paste

Standard 'paste' operation.

### Paste Link

Allows the copied object to be linked into another object (e.g. linking an attribute into a second attribute group). Creates another instance (not a copy) of the same object, just in a different location.

### Select All

Standard 'select all' operation.

**Spelling**

Automatic spell check is enabled / disabled here and manual spell check can be accessed here.

**Asset**

Create local content of asset, delete local content of asset, update asset system properties, and edit asset can be accessed here.

**Edit Unique Key Values**

Edit the key values of the currently selected object.

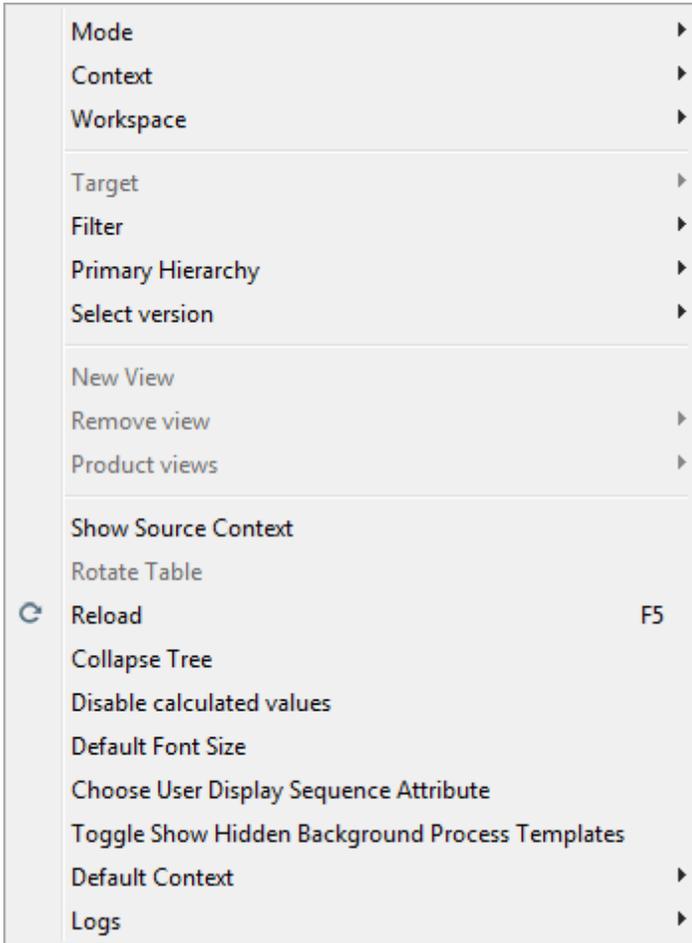
**Remove Row(s)**

Removes a selected row, e.g. an attribute linked to a product. Keyboard Shortcut = Ctrl + '-'.

**Insert Row**

Adds an additional row, e.g. an attribute linked to a product. Keyboard Shortcut = Ctrl + '+'.

**View Menu**



## Mode

- Normal viewing mode can be accessed here. This is the normal view where the majority of product maintenance occurs.
- Translation view shows a split-screen between a selected source language and the currently selected language. The source language is also selected in this menu.
- Workspace viewing mode can be accessed here. It shows a comparison of values between workspaces.
- Context Viewing mode can be accessed here. It shows a comparison of values between different contexts. For example, this will allow a user to view values for all languages or for all price versions.
- Revision Viewing Mode can be accessed here. It shows a comparison of values between different revisions.
- Update Viewing Mode can be accessed here. It is a comparison view between object differences across workspaces. Additionally, it allows the user to update the object in the current workspace from a source workspace.

## Context

Context shows all available contexts. It is possible to change context and view objects as they appear in different contexts.

## Workspace

Workspace shows all available workspaces. It is possible to the change workspace and view objects as they appear in different workspaces.

---

**Note:** In the Workbench toolbar next to the context selector, a toggle icon (  ) is available. It makes it possible to switch between Main and Approved workspaces.

---

## Target

Depending on the view chosen, this function changes from target to source. E.g., when in the Translation view, this allows the user to select the source language.

## Filter

A view that filters out empty attribute values, non-mandatory attributes, uneditable attributes, and/or illegal attributes.

## Primary Hierarchy

A product may be located in several different hierarchies. When searching for products, a user may wish to locate the product in a particular hierarchy. For example, a product manager may always want to view the product in its position in the main classification (All Products). However, a web administrator may wish to view the product in its location in the alternate web classification. This option sets the default as to which hierarchy the product will be displayed in when it is selected from the search's 'hit list'.

## Select Version

Allows the user to set the default publication / version used for proofing.

## New View

Allows the user to create / customize a new view to hide / show attributes.

## Remove View

Removes an unwanted / unneeded view.

## Product Views

Shows the products that are selected.

## Show Source Context

Attribute names may be translated. This option allows a user to view attribute values in a foreign language but still view attribute names in the source language.

## Rotate Table

This will flip the selected table so that the columns become rows and vice versa. This is most often used in a multi-product editor. Keyboard Shortcut = F11.

## Reload

Retrieves updated information from the database including other users' changes.

## Collapse Tree

Collapses the folders in the Tree navigator.

## Disable calculated values

Disables the calculation of calculated attributes. This will make the STEP interface load faster.

---

**Note:** If **Disable calculated attributes** is checked, calculated attributes can be rendered one by one by clicking the **Calculate button** on the Product editor



## Default Font Size

Allows the user to change GUI font.

## Choose User Display Sequence Attribute

Allows the user to select a user specific Display Sequence Attribute, different from the global set up in [System Setup], Users & Groups, in the System Settings tab, under Product Information Manager Default Settings.

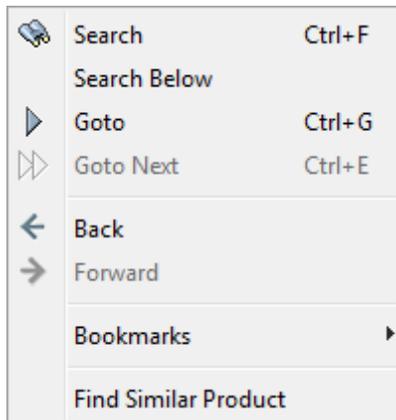
## Default Context

Sets the default context used when logging in.

## Logs

Displays Workspace and System Setup logs.

## Navigate Menu



## Search

Searches for all different types of objects within the PIM (products, attributes, assets, etc.). Also contains the ability to search a) within a selected hierarchy, b) via attribute values, and c) via custom queries.

## Search Below

Performs a search within a selected hierarchy.

## Goto

A quick way to jump to a particular object in the database based on the name, ID, or Unique Key value. If there are multiple hits, it will jump to the first one it finds.

## Goto Next

When there are multiple hits from the 'Goto' function, the user can opt to select Goto Next to continue on to the next hit.

## Back / Forward

Jumps the user backwards or forwards to previously selected objects. Works the same as the Back / Forward button in a web browser.

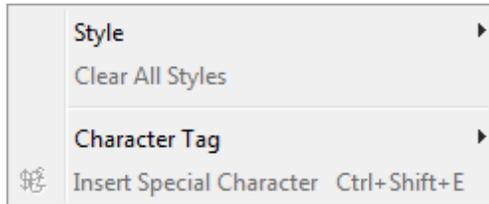
## Bookmarks

Allows the setting of bookmarks specific to individual users – just as in a web browser. For example, a user can 'bookmark' a specific search query.

## Find Similar Product

Populates a search based on the attributes of the selected product. When selected, a window will appear prompting the user to check off common attributes to search for.

## Format Menu



### Style

Users can apply style formatting to selected strings of text such as bold, italic, or custom style tags.

### Clear All Styles

Removes all styling that is applied to a selected string of text such as bold and italic.

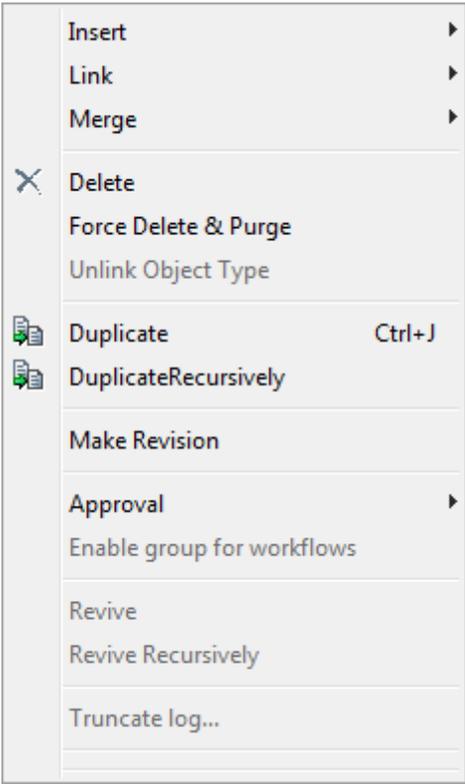
### Character Tag

Inserts custom tags e.g. <BigStar/> into a text string.

### Insert Special Character

This is an embedded character map. It shows the most recently used characters and offers a complete Unicode character range.

## Maintain Menu



### Insert

Insert an object based on either the currently selected tree or elsewhere.

### Link

Allows users to link attributes to products, assets, products to classifications, etc.

### Merge

Depending on the selected object, the user can merge attributes, LOVs, and LOV values.

### Delete

Standard 'delete' function. Warns the user if the selected folder contains subfolders. All deleted objects are moved to the Recycle Bin (where they can be revived or totally removed from the system).

### Force Delete and Purge

If an object is selected in the workbench, and Force Delete and Purge is clicked, the object will be deleted and purged from recycle bin.

## Unlink Object Type

A System Setup option. Allows a superuser to unlink a selected object type from its parent.

## Duplicate

Standard 'duplicate' operation. Essentially a copy and paste in one click.

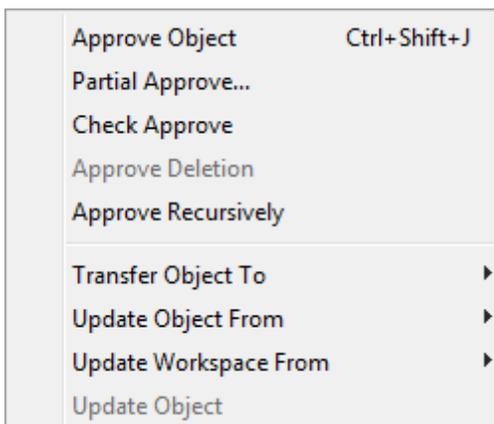
## Duplicate Recursively

If a hierarchy needs to be duplicated, the user can select the top node in the hierarchy and click Duplicate Recursively. The hierarchy will be duplicated.

## Make Revision

Allows a user to force a revision on a product and provides a comment for explanation.

## Approval



### Approve Object

Approves an object from the Main workspace to the Approved workspace and changes the red X ( ✖ ) to either a green checkmark ( ✔ ) or a yellow one ( ⚠ ).

See the **Object Approval Overview** section of the **STEP User Guide / Getting Started** documentation for more information.

### Partial Approval

Approve selected parts of the unapproved changes on selected object.

### Check Approve

Generates report that shows what would happen if the object is approved.

### Approve Deletion

Deletes the object from the Approved workspace.

## Approve Recursively

Launches a workflow process that will approve the currently selected object and all of its children.

## Transfer Object To

Takes selected object and moves it into the chosen workspace.

## Update Object From

Updates the object across all workspaces, including references and values for classifications, products and images & documents.

## Update Workspace From

Updates the current workspace from another workspace. It is possible to update the entire workspace or only a part of the workspace. Objects that do not exist in the current workspace will be transferred to the current workspace.

## Update Object

Updating objects across workspaces. This means that if an object exists in different workspaces, values and references can be updated across these workspaces.

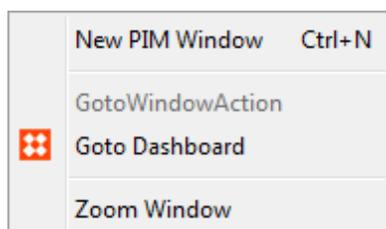
## Revive

Revives a deleted object.

## Revive Recursively

Revives a deleted object recursively.

## Window Menu



## New PIM Window

Allows the user to launch another PIM session.

## Goto Dashboard

Brings the user to the dashboard.

## Zoom Window

Maximizes the selected PIM window.

## Help Menu



## Help

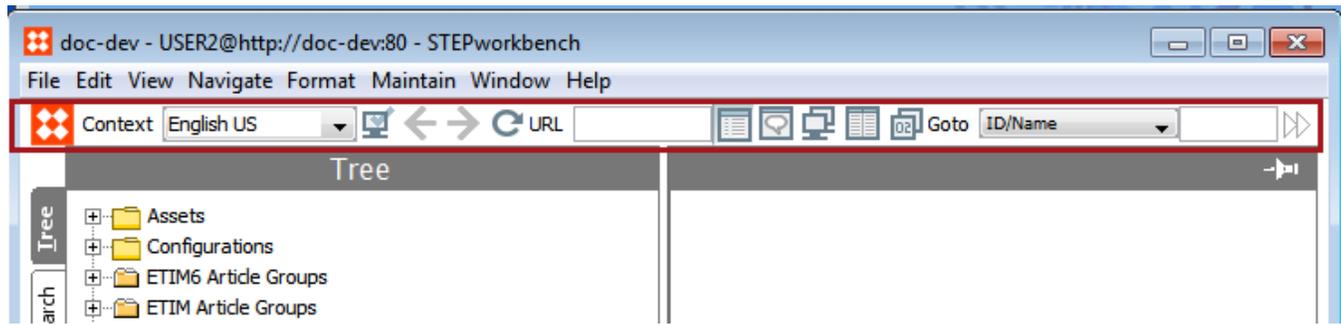
Brings the user to the online help documentation.

## About STEP

Displays the workbench introductory window.

## Toolbar

The features accessible on the STEP toolbar, (located beneath the menu bar), are geared towards navigating between objects and viewing object data in different ways.



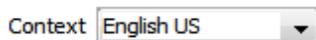
The various features available on the STEP toolbar are described below.

## Stibo Systems Logo



Clicking the Stibo Systems logo allows the user to toggle between the STEP dashboard and the STEP Workbench. For more information regarding the Dashboard see the Global Dashboard documentation .

## Context List



'Context' acts as a filter that allows a user to view object data defined by, for example, country or language.

To select the context, the user clicks the dropdown and then selects the desired context from those listed. When working in STEP it is useful to check that the context is properly set because viewing data in the wrong context is likely to cause significant confusion. For more information regarding contexts see the Contexts documentation .

## Workspace Toggle Icon

Located to the right of 'Context', the Workspace Toggle button, , switches the user's view of a given object between the 'Main' and 'Approved' workspaces. In the 'Main' workspace, object information is editable. In the 'Approved' workspace, the user will see only those values that have been approved, and may not edit them.

## Navigation Icons



To navigate backward or forward to a previously viewed screen or to refresh the current screen's data, the user can click the 'Back', 'Forward', or 'Reload' buttons, respectively. These buttons are located between the 'Workspace Toggle' button and the URL field. When clicked, these buttons behave in a way similar to most web browsers' 'Back', 'Forward', and 'Reload' functions.

## Address Field

URL

To maximize navigability of the STEP tool, all objects may be accessed via an in-tool URL. As with the URL bar in a standard web browser, a product may be reached within STEP by pasting its unique URL into the URL bar. It is important to note that the STEP URL always begins with "**step://**", unlike web URLs which begin with "**http://**" or "**https://**".

## Viewing mode icons



STEP enables the user to view STEP data in a variety of ways, dependent on the need. When clicked, each of the five 'View' icons that appear to the right of the URL field in the toolbar present STEP data in different ways. Below are the five view modes described:

### Normal mode



This is the default view of the STEP Workbench. With this view selected, users will see a listing of all relevant attribute and metadata associated with that object.

### Translation mode



With this mode selected, users can view all object-related data in up to two languages. The data is presented in a comparison display format. STEP automatically highlights in green those attributes that require translation.

### Workspace mode



With the 'Workspace' view active, users can see object data as it appears in both the 'Main' and 'Approved' workspaces. This comparison view can be useful by allowing a user to view, at a glance, which values have changed since the object was last approved. However, if the object is in 'Never been approved' status, only the 'Main' workspace will show when this view is active.

### Context mode



With this view enabled users can view all of an object's data for two or more available contexts in a comparison display format. The number of contexts viewable at one time is configurable.

## Revision mode



With this mode selected, users can view the current state of an object's data as well as all previous revisions in a comparison display format. The number of revisions viewable at one time is configurable, but the current and previous versions are shown as the default.

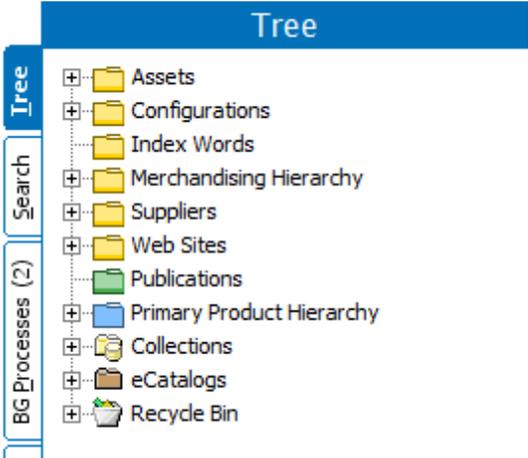
## Goto field

Goto

This field enables searching for specific objects. To quickly locate objects in the hierarchy by their ID, name, or key, that data can be added into the 'Goto field' and searched on. When the desired item appears in this field, the user can click on it, taking them directly to the object. For more information regarding the Goto field, see the Using Goto documentation . For more information on Keys, see the Unique Keys documentation

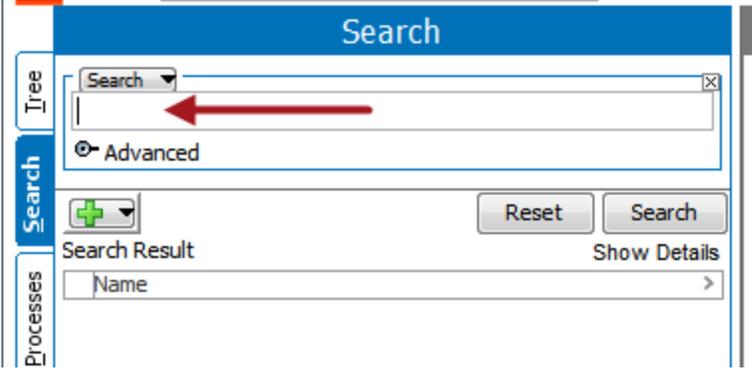
# Tree Tab

The Tree tab displays Products, Classifications, Assets, Entities, Publications, Collections, eCatalogs, and the Recycle bin.

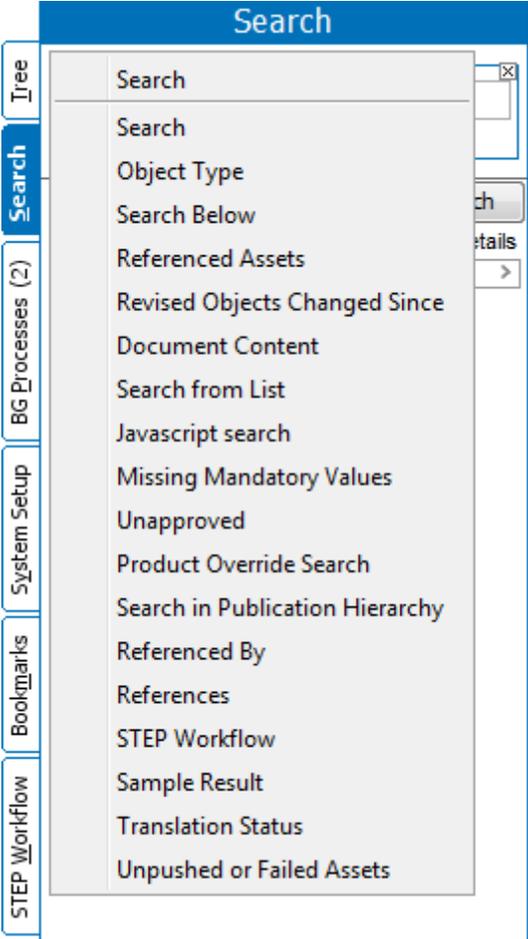


# Search Tab

The Search tab allows users to perform simple searches by typing directly into the default search field.



Users can also perform more complex searches by selecting and/or combining additional search criteria.



For more on Searching, see the Search Overview section of the STEP User Guide / Getting Started documentation).

# Background Processes Tab

The Background Processes tab shows all active and non-active processes in STEP. Each time there is any activity such as imports, exports, bulk-update, creating collections, etc, there is a background processes, BGP, which generates the logs and lets the users know if the process was successful. In the event of an unsuccessful background process, an error message is displayed showing the reason for failure.

**Background Process** Queue Info

Property	Value
Started by	USER1
Id	BGP_180963
Description	100703, en-US > German, Tue Jul 05 13:53:00 +0530 2016
Execution Server	doc-dev
Progress	30%
Status	failed
Created	Tue Jul 05 04:23:01 EDT 2016
Started	Tue Jul 05 04:23:15 EDT 2016
Finished	Tue Jul 05 04:23:17 EDT 2016
Processing Time	0 m 2 s
Time in Queue	0 m 14 s
# of warnings	0
# of errors	2

**Execution Report**

- Analyse
- Logged on
- Analyzing translation request
- Analysis selected 1 out of 1 nodes for translation
- Leaving query service
- Root node was specified. Will wait for user to accept analysis result
- Parsed translation configuration
- Logged on
- Updating translation status
- 1 nodes will be exported for translation
- Registering pending translation file '100703-100703.xlsx'
- Xml for translation: [exceltranslation\\_BGP\\_180963.zip](#)
- Translation Export Completed
- Export failed with exception: Optimistic locking errors were detected when flushing to the data s
- Caught OptimisticVerificationException at Tue Jul 05 04:23:17 EDT 2016: Optimistic locking en

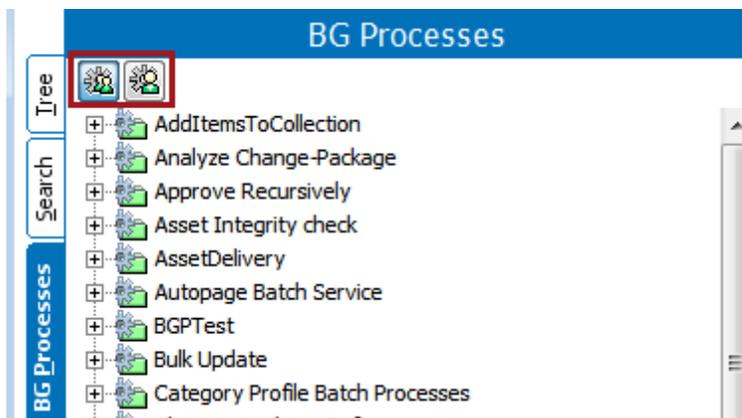
Based on the type of activity being generated, there are many different kinds of background processes. A few are mentioned below:

1. Approve recursively
2. Bulk Update
3. Create Collection
4. Download Report

5. Export Manager Pipeline
6. Import Manager Pipeline
7. Purge Revisions
8. Revive Recursively
9. Translation
10. Translation Import

## Background Process View Options

In the Background process tab, there are two options for viewing BGPs. A user logged in can choose to see only the BGPs that they have initiated or the user could choose to see all the BGPs run by everyone. These two options can be selected by clicking on either the 'One Man and Gear' button or the 'Two Men and Gear' button.



**One Man and Gear:** This icon, , will display the background process run by the user who has logged into the STEP system.

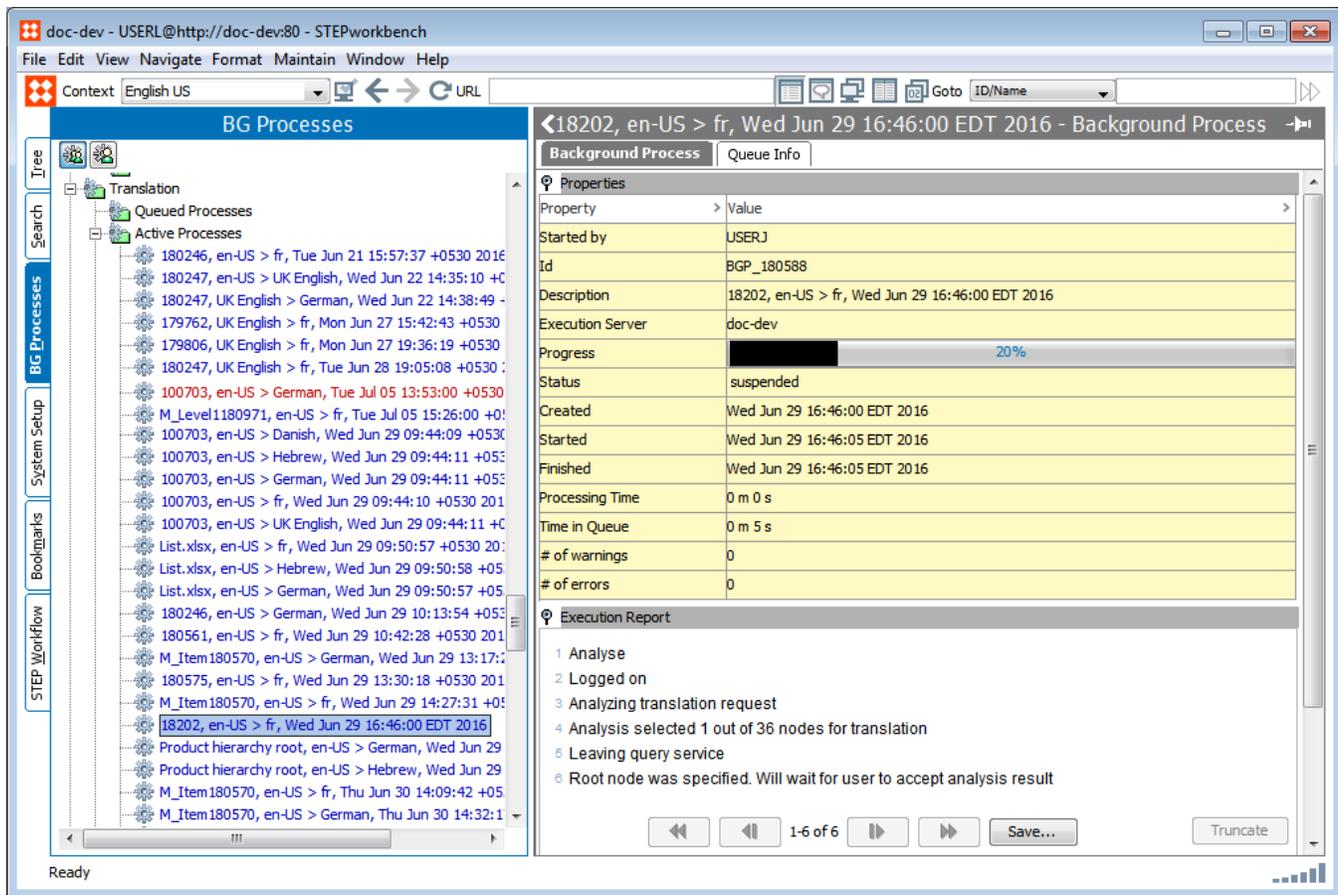
**Two Men and Gear:** This icon, , will display the background process run by all users of the STEP system. To have this privilege available, the 'View Background Processes of Other Users' setup action must be added for the users who need access to this feature.

## Background Process States

For each background process started, there are four states that it could enter. Below each state is described in detail:

### Active Process

This shows the list of processes which are currently being executed. If there are any processes which failed, then those processes will still be in the active process node, but highlighted in Red color.



## Queued Process

This shows the list of processes which are in queue. Once the active processes are complete, the queued process moves to the active process.

## Completed with Errors

This shows a list of processes which are completed, but with a few errors. The minor errors are displayed with the details, but the one's which can be processed will eventually complete.

## Ended Process

This displays a full list of all the processes which have been processed without any errors.

The screenshot displays the 'BG Processes' interface. On the left is a tree view with categories like 'Active Processes', 'Ended Processes', and 'Unique Key Processes'. The 'Unique Key Processes' category is expanded to show 'Activating: Key 4' and 'Deactivating: Key 4'. The right pane shows a detailed view for 'Activating: Key 4' with a 'Background Process' tab selected. This view includes a table of process details and an 'Execution Report' section.

Background Process	
Execution Server	doc-dev
Progress	Done
Status	succeeded
Created	Tue Jul 19 08:31:32 EDT 2016
Started	Tue Jul 19 08:31:32 EDT 2016
Finished	Tue Jul 19 08:31:32 EDT 2016
Processing Time	0 m 0 s
Time in Queue	0 m 0 s
# of warnings	0
# of errors	0

**Execution Report**

- 1 Start calculating keys for activating unique key with ID Key 4. (Tue Jul 19 08:31:32 EDT 2016)
- 2 For 0 objects in object types: (Tue Jul 19 08:31:32 EDT 2016)
- 3 Using template "null". (Tue Jul 19 08:31:32 EDT 2016)
- 4 Synchronized. Activation continues. (Tue Jul 19 08:31:32 EDT 2016)
- 5 Waiting to enter single-update-mode to activate unique key. (Tue Jul 19 08:31:32 EDT 2016)
- 6 Got single-update-mode - looking for duplicates. (Tue Jul 19 08:31:32 EDT 2016)
- 7 No duplicates - activating unique key with ID Key 4. (Tue Jul 19 08:31:32 EDT 2016)
- 8 Successfully generated unique keys for unique key with ID Key 4 for 0 objects. (Tue Jul 19 08:31:32 EDT 2016)

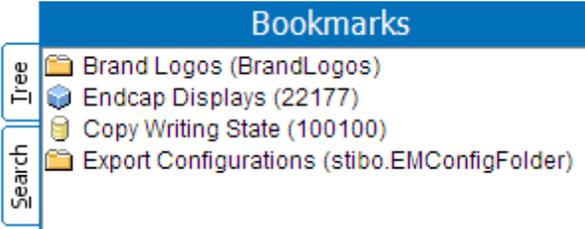
# System Setup Tab

Schema objects are maintained from the System Setup tab. Examples of such objects are Attributes, Action Sets, Contexts, LOVs, Object Types, Tags, Units, Users & Groups, Workspaces, and Reference Types. Most actions performed here require Super User access.

The screenshot displays the 'System Setup' tab interface. At the top, a blue header bar contains the text 'System Setup'. Below this, a vertical sidebar on the left contains several tabs: 'Tree', 'Search', 'BG Processes', 'System Setup', 'Bookmarks', and 'STEP Workflow'. The 'System Setup' tab is currently selected and highlighted in blue. The main area of the interface shows a list of system objects, each with a small icon and a plus sign to its left. The objects listed are: Attribute Groups, Attribute Transformations, Action Sets, Contexts, Lists of Values / LOVs, Gateway Endpoint, Global Business Rules, Inbound Integration Endpoints, Match Codes and Matching Algorithms, Outbound Integration Endpoints, Portals, Status Flags, Workflow Profiles, Workflows, Derived Events, Object Types & Structures, Tags, Units, Users & Groups, Reference Types, Workspaces, Table, Keys, Event Queues, Component Models, and Recycle Bin.

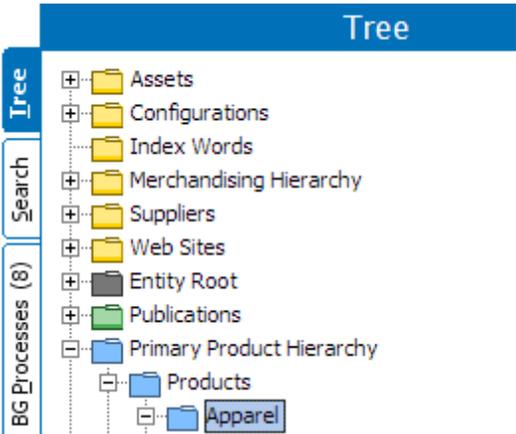
# Bookmarks Tab

The Bookmarks tab allows users to set bookmarks for any objects in the Tree, and allows users to easily access these objects without having to search or navigate the Tree.

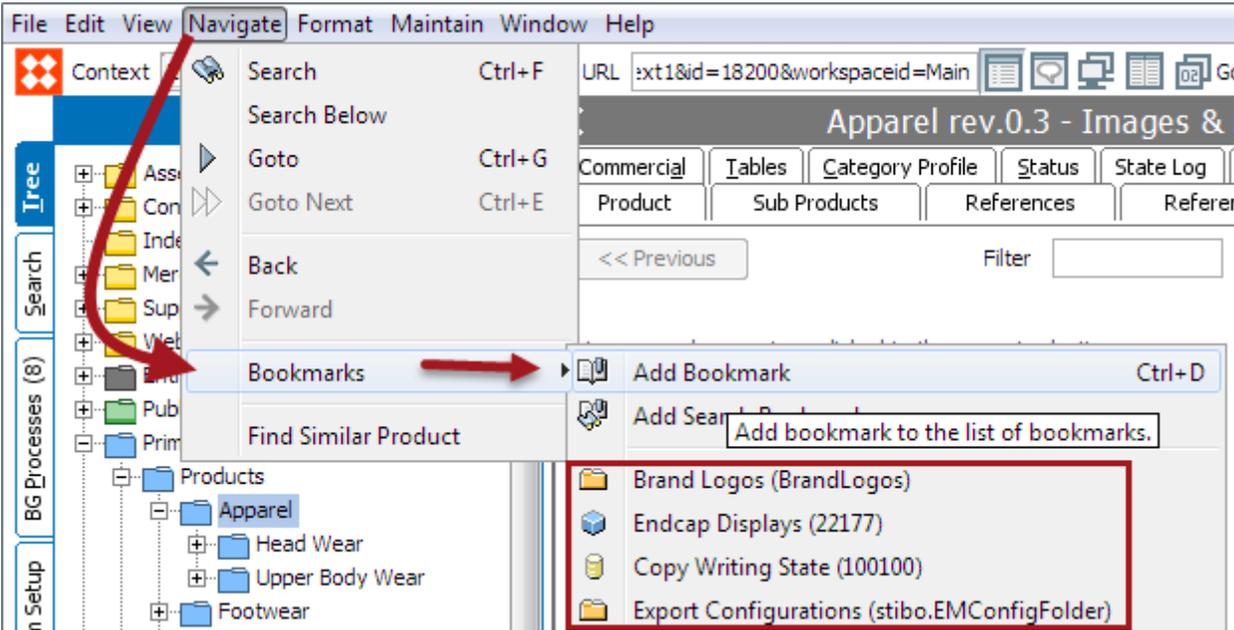


# Adding a Bookmark

1. On the tree, select the item to be bookmarked.



2. On the Navigate menu, select Bookmark and Add Bookmark



**Tip:** Notice that the existing bookmarks are displayed on the menu.

3. Your new bookmark is displayed on the Bookmarks tab



4. Click the new bookmark



5. The bookmarked data is displayed on the Bookmarks page

The screenshot shows the 'Apparel rev.0.3 - Product' page. On the left is a sidebar with navigation options: Tree, Search, BIG Processes (8), System Setup, Bookmarks, and STEP Workflow. The main content area displays product details for 'Apparel' (ID 18200). The 'Name' field is circled in red. A 'No Primary Image' placeholder is visible on the right.

Description	
Name	Value
ID	18200
Name	Apparel
Object Type	Level1
Revision	0.3 Last edited by USER on Thu Jul 30 11:...
Approved	✗ Last Approved on Thu May 21 14:58:...
Translation	Not Translated
Path	Primary Product Hierarchy/Products/Apparel
City	abc
Country	abc
State	abc
Street	abc
Zip	12a

Sales Item Marketing Descriptions	
Name	Value
Description, Long	abc

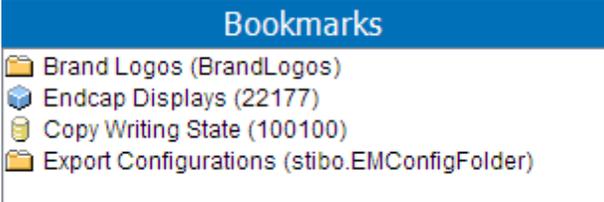
Attribute Group	
Name	Value
Size	abc

# Removing a Bookmark

1. On the Bookmarks tab, right-click the bookmark to be removed and click Remove Bookmark.

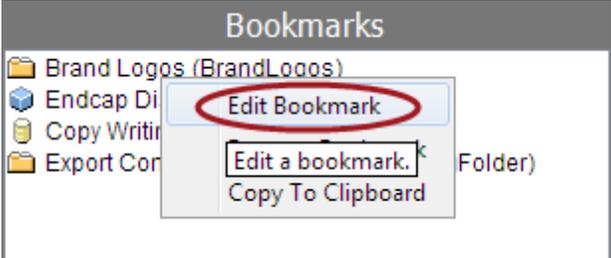


2. The selected bookmark is removed.

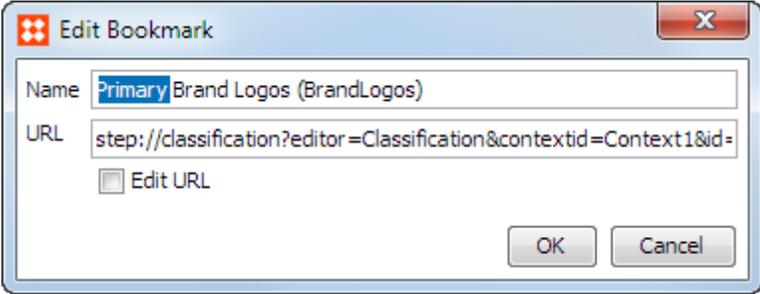


# Editing a Bookmark

1. On the Bookmarks tab, right-click the bookmark to be modified and click Edit Bookmark.



2. Modify the name or URL of the bookmark

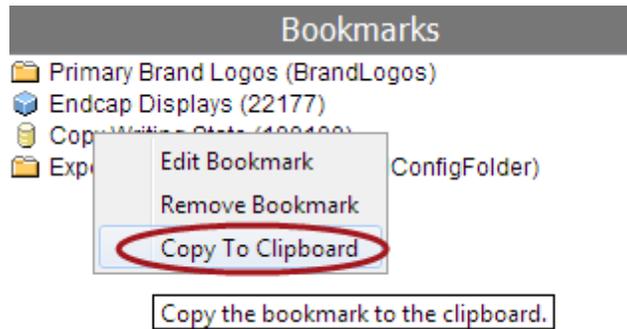


3. The name is updated on the Bookmarks tab

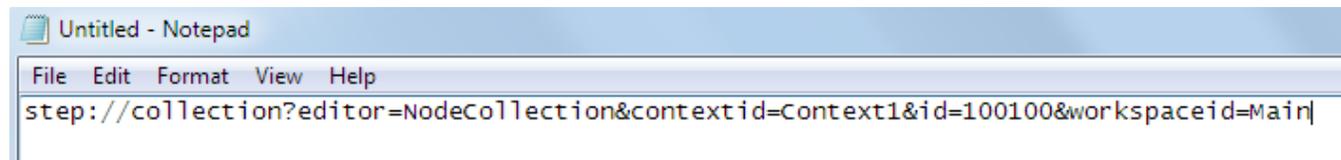


## Copying a Bookmark to the Clipboard

1. On the Bookmarks tab, right-click the bookmark to be removed and click Copy to Clipboard.



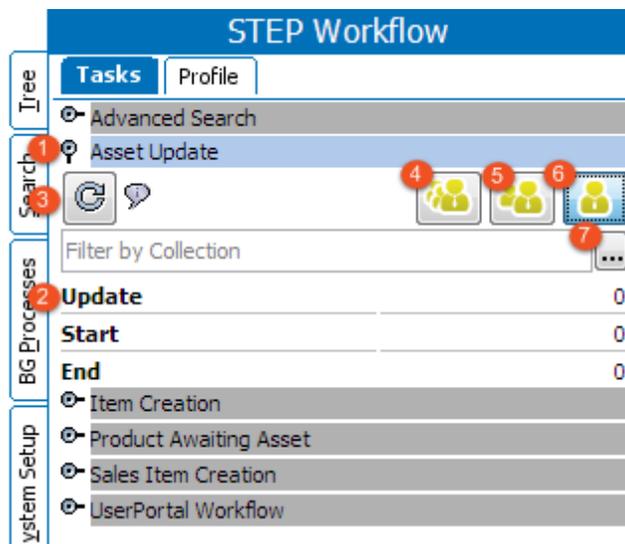
2. Use Ctrl-V to paste the copied URL of the bookmark.



# STEP Workflow Tab

The STEP Workflow tab has 2 sub tabs (Tasks and Profile).

## Tasks



The Tasks sub tab is the primary interface for working with workflows in the STEP Workbench.

1. Each workflow has a flipper that can be opened to display details about the workflow.
2. Administrators can configure which states are displayed for each workflow. The number of tasks for the state are displayed.
3. The Refresh button updates the data displayed for number of tasks in the workflow.
4. Clicking the **Show All Items** button displays all tasks in all displayed states, regardless of the assignee. Only users with the STEP Workflow Administrator privilege have access to this button.
5. Clicking the **Show All Items assigned to me or any group I am a member of** button displays tasks directly assigned to the user or any group that the user is a member of.
6. Clicking the **Show All Items assigned to me** button displays only tasks that are directly assigned to the user.
7. Clicking the ... (ellipsis) button allows users to filter the list of displayed tasks based on a Collection. For example, if a user wanted only to see objects in the workflow where the Color Attribute = Blue, they can first perform an Attribute search on the Search tab, then save the result as a Collection, and use that Collection to filter the objects to display only those where Color is Blue.

# Profile

**STEP Workflow profile**

Configuration last edited by user on 2015-07-23 13:46:21; On-demand data has not yet been generated for this profile

State	STEP Workflow	Items in State	Average time in State
> Copy Writing	SalesItemCreation	11	81 Days
> Copy Writing Cluster	SalesItemCreationNewBR	4	123 Days
> Copy Writing Cluster	SalesItemCreation	11	81 Days
> Copy Writing Ended	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreation	11	81 Days
> Digital Asset Review	SalesItemCreationNewBR	4	123 Days
> Digital Asset Review	SalesItemCreation	11	81 Days

1. Click a Profile link to see details of the configuration .
2. The **Edit Configuration** button allows you to modify the data being profiled.
3. The **Update on-demand data** button runs the profile and updates the data displayed.
4. The **Copy to Clipboard** button saves the data displayed to your computer's clipboard
5. Once saved to the Clipboard, this data can be pasted into Excel for further analysis.

# Object Details

When an object is selected from the left panel in STEP (e.g. Tree tab, System Setup tab, etc), the right panel displays details for the selected object. The kind and number of tabs will vary depending on the selected object. However, all objects will have an ID, Name, and Object Type.

<
18207-012 rev.0.2 - Product
>

Images & Documents

Commercial

Tables

Category Profile

Status

State Log

Tasks

Product

Sub Products

References

Referenced By

🔍 Description

Name	>	>	Value
ID	>		18207
Name	>		18207-012
Object Type	>		SalesItem
Revision	>		0.2 Last edited by USER on Mon Jul 27 15:43:10 EDT 2015
Approved	>		<span style="color: red;">✖</span> Last Approved on Mon Jun 15 16:27:06 EDT 2015
Translation	>		Not Translated
Path	>		Primary Product Hierarchy/Products/Apparel/Upper Body Wear/T-shirts/T-Shirts
Condition	>		<span style="color: green;">?</span>
Parent	>		<span style="color: blue;">fx</span> T-shirts
Path	>		<span style="color: blue;">fx</span> Apparel   Upper Body Wear   T-shirts   T-Shirts Sales Items   T-shirts
Status	>		<span style="color: blue;">☰</span>



🔍 Sales Item Marketing Descriptions

Name	>	>	Value
Description, Long	>		<div style="display: flex; align-items: flex-start;"> <div style="width: 20px; font-size: 8px; color: green; margin-right: 5px;">abc</div> <div> <p>The Hanes Beefy-T T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.</p> </div> </div>

## Product Maintenance

This section deals with products. In STEP terms, a product is a part number, a stock number, an order number, a catalog number, a product number, etc. In other words, any orderable item that a company sells.

After reading this section, you should be able to:

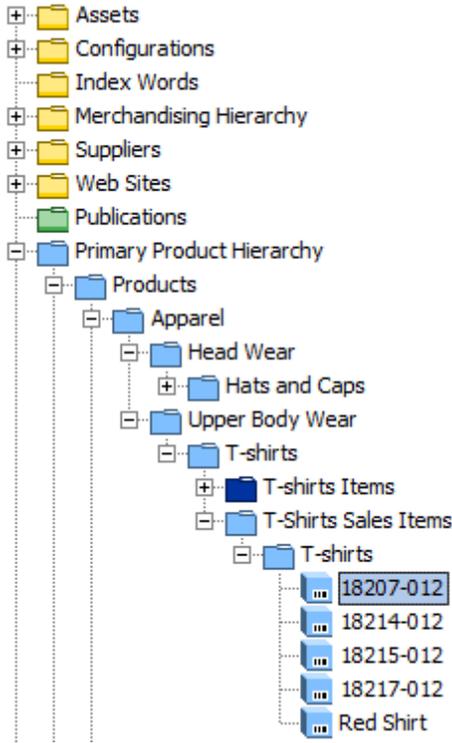
- Create/Delete products
- Link/Unlink attributes to product groups
- Edit attribute values

# Product Hierarchy

The Product Hierarchy is an organized hierarchy where all products in the workbench are stored. This is also where products and product attributes are linked and product attribute values are defined. Although configurable, the Product Hierarchy is usually a multi-level hierarchy—each level controlled by its own unique Object Type. Superusers can control the naming convention(s) used to categorize the products at their different levels.

The system allows for any number of different types of hierarchies to be created . For example, supplier hierarchies may be set up, as well as country/region hierarchies, customer hierarchies, and so on. All of these hierarchy types are configured via the “Tree” tab.

That said, a standard system will always have a minimum setup (configuration) of one hierarchy type—the Product Hierarchy.



The above is a screenshot of a Product Hierarchy.

All product groups are represented by a file folder (📁).

A + sign signals that the folder contains subfolders and can be expanded, the same as in Windows File Manager.

An actual product is displayed below its parent folders.

# Attribute Inheritance

An important advantage of linking product attributes to the product hierarchy is inheritance. When a product attribute is linked to a product folder, that attribute is inherited down through the tree. For example, attributes such as Price, Warranty, Description, and Manufacturer Name are considered to be **global attributes**. Thus, these attributes are linked to the top level and are inherited down to all products beneath, no matter how many levels there are.

Attributes can be linked to any point within the product hierarchy. As just stated, 'Global' attributes are linked to the top level, while attributes that are more specific to the product are linked to the appropriate and corresponding product groups. For example, the attribute 'Ink Color' would be linked to the product group 'Pens' but not to 'Projectors'.

Attribute inheritance only means that the attributes are now valid (or *available*) for all of the products beneath where they are linked. The process of linking attributes to different levels does not have anything to do with the actual values that will go into the attributes for any particular product. In the 'Ink Color' example, when linking that attribute, you are only concerned with making that attribute available to all the Pens products—not with the ink color for every product.

## Attribute Values & Value Inheritance

Once the product hierarchy is created and the attributes are linked to the appropriate locations, the next step is to enter values. Obviously, you must be able to state that for product ABC-2500-1006, the ink color is 'Black'. This can be done either by importing a file manually or by entering 'Black' into the value field of the product editor in workbench. For large amounts of data, the Import Manager is recommended.

Category Specific Attributes		
Name	>	Value
> Color		Black
> Fit	abc	
> Primary Color	abc	

As mentioned above, it is possible to set attribute values for an individual product, but consider a situation where all products within a product group share common attribute values, i.e. all pens that have the same manufacturer.

There are two ways to approach this: 1) keep all common values with the individual product or 2) set the common value at a higher level in the product hierarchy (the product group level). By setting the value higher in the hierarchy, the attribute value is inherited down to all products beneath.

Item Description Information		
Name	>	Value
> Product Name	abc ✓	Name 1
> Short Item Description	abc	T-shirt, short sleeve, Beefy-T, Mens M, Royal Blue
> Long Item Description	abc	Hanes Beefy-T short sleeve T-shirt in 100% cotton that resists shrinkage. Men's Medium. Royal Blue.
> Family Description	abc ✓	The Hanes Beefy-T T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.

An example of an inherited value – the Product Name

The figure above shows an inherited value, which is designated by a green upside down arrow (✓).

The value is set at the product group, or in this case, 'Pens'. Therefore, all products beneath will inherit the same value.

It is possible to override an inherited value by setting a different value at any subordinate level, e.g. the product level. This is called a **localized value**. It may be that a majority of the products in a group have the same manufacturer, so the “default” value would be found in the product group while local values would be set for the exceptions.

## Advantages of Inherited Values

There are many advantages to setting common values.

- When an update is needed, the value is only entered once in the product group instead of – potentially – separately, across hundreds of products.
- When new products are added to the group, they automatically inherit the product group’s values.
- The translation of product group values only need to be performed once, as opposed to translating the same value every time for individual products.

# The Product Maintenance Interface

1 Description		
Name	>	Value
> ID		20808
> Name		20808-012
> Object Type		SalesItem
> Revision		0.2 Last edited by USER on Thu Jul 30 13:28:54 EDT 2015
> Approved		Never Been Approved
> Translation		Not Translated
> Path		Primary Product Hierarchy/Products/Apparel/Head Wear/Hats and Caps/Hats and Caps SalesItems/20808-012
> Condition		
> Parent		Hats and Caps SalesItems
> Path		Products   Apparel   Head Wear   Hats and Caps   Hats and Caps SalesItems
> Status		
Sales Item Marketing Descriptions		
Sales Item Pricing		
2 Category Specific Attributes		
Name	>	Value
> Primary Color		abc

**1. Product Description** - This area displays the ID, Name, and Object Type of the selected product. It gives further information about when this product was last edited and its complete path.

It also provides information about the Approved status of the product. See **Object Approval Overview** within the **STEP User Guide / Getting Started** documentation for more information.

**2. Attribute Group 'Flippers'** - All attributes and attribute groups that are valid for this product and are available to the user for editing (via User Rights and Privileges) will display here. Each attribute group has its own 'flipper'. Shown is the flipper for the attribute group called Category Specific Attributes.

By default, attributes shown in the Product Editor of a product are listed in alphabetical order. If an Attribute Display Sequence Attribute has been set on your STEP system, the attributes shown in the Product Editor are sorted according to the order set in the Display Sequence attribute. Attributes that have no sequence number, and therefore are alphabetically sorted, will be placed last in the list. See **Attribute Display Sequence** within the **STEP User Guide / Getting Started** documentation for more information.

## Creating New Products / Product Groups

The following task list is appropriate for all objects except Attributes, Assets, and Users.

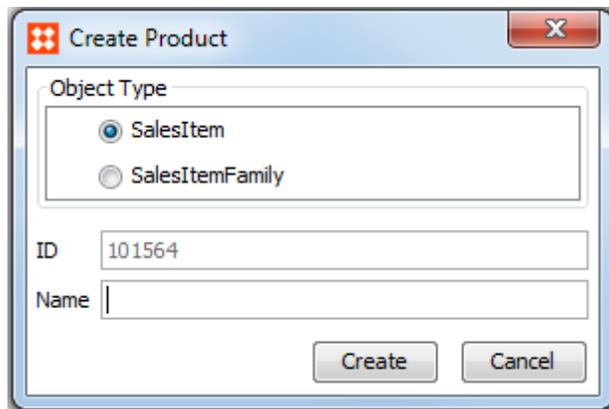
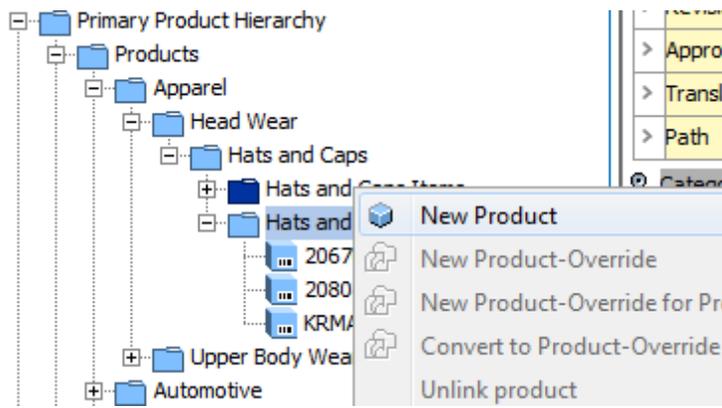
See **Overview of Asset Maintenance** within the **STEP User Guide / Getting Started** documentation for more information on asset creation.

---

**Note:** The menus and windows may change slightly depending on the object being created.

---

1. Select the parent folder. Right-click and select **New...** from the context menu.



2. Select the appropriate type of object to create (i.e. **SalesItem**). Type in the ID and Name of the new object.

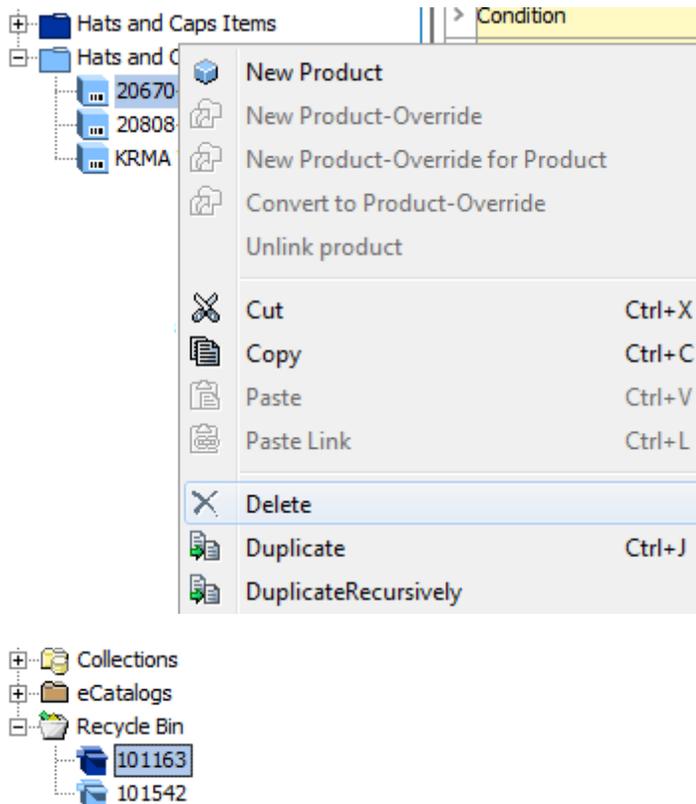
Depending on the parent object, the list below will contain different choices – or may not appear at all. The ID field must be unique. In some system setups, the ID is autogenerated and will simply display the next number in a system list. In that case, just type in the name.

3. Select the **Create** button.

The newly created object will appear.

## Deleting Products / Product Groups

1. Select the item to be deleted. Right-click and select **Delete** from the context menu.
2. A delete confirmation window will appear. Select **Delete** and the object will go to the Recycle Bin.



---

**Note:** The menus and windows may change slightly depending on the object being deleted.

---

If the object has subfolders, a separate warning window will appear and ask if you wish to continue. You cannot delete an object (i.e. empty from Recycle Bin) if it is used in a module (for products & assets). Ideally, the user should check to see whether the object is being used in a module before sending it to the Recycle Bin.

# Linking an Attribute to a Product

To make attributes valid for products, they must be linked to the appropriate trees in the Product Hierarchy. Many attributes will be global attributes linked to the “Product Hierarchy” root node. These global attributes are then valid for all products.

1. Select the product or product group, then click the **References** tab. Under **Linked Attributes**, click **Link to Attribute**.

Product | Sub Products | **References** | Referenced By | Images & Documents

- ⊖ Discontinued Product Maintenance
- ⊖ Image References
- ⊖ Sales Item References, Classification
- ⊖ Sales Item References, Product
- ⊖ Index Words
- ⊖ Publications
- ⊕ **Linked Attributes from Product Hierarchy**

ID	Name
⌵ AirTransportationRestrictions	Air Transportation Restrictions
⌵ AnnualSalesForecastMaximum	Annual Sales Forecast, Maximum
⌵ AnnualSalesForecast,Minimum	Annual Sales Forecast, Minimum
⌵ AvailabilityEnd	Availability End
⌵ AvailabilityStart	Availability Start
⌵ BaseUnitOfMeasure	Base Unit of Measure
⌵ BrandName	Brand Name
⌵ BrandOwner	Brand Owner
⌵ Color	Color
⌵ Cost	Cost
⌵ CostEffectiveDate	Cost Effective Date
⌵ CostExpirationDate	Cost Expiration Date
⌵ CountryOfOrigin	Country of Origin
⌵ DescriptionLong	Description, Long
⌵ TaxClassification	Tax Classification
⌵ TshirtSize	T-shirt Size
>	<a href="#">Link to Attribute</a>

A standard search window will appear.

2. Locate the appropriate attribute(s) and then click **Select**.



# Editing Attribute Values

Values can be maintained at the individual product level or on a selected group of products.

## Edit Single Product

1. Navigate to the relevant product in **Tree** and open up the product editor.
2. On the **Product** tab, select the value field next to the attribute you wish to edit.

**Note:** Editing in the workbench is similar to Excel editing. Pressing the tab key shifts the focus to the next cell. Shift+Tab shifts the focus to the previous cell. F2 enters the cell. Alt+F2 will open a large editor with a dialog to assist keying in a valid value.

Product		
Description		
Name	> >	Value
> ID		110190
> Name		Hat123
> Object Type		SalesItem
> Revision		0.1 Last edited by USER on Tue Sep 29 11:16:36 EDT 2015
> Approved		Never Been Approved
> Translation		Not Translated
> Path		Primary Product Hierarchy/Products/Apparel/Head Wear/Hats and Caps/Hats and Caps SalesItems/Hat123
> Biodegradable	abc	
> Category		Primary Product Hierarchy   Products   Apparel   Head Wear   Hats and Caps   Hats and Caps SalesItems   Hat123   Hat123
> Condition		
> Parent		Hats and Caps SalesItems
> Path		Products   Apparel   Head Wear   Hats and Caps   Hats and Caps SalesItems
> Product Variant Priority		
> Status		
> URL		
Sales Item Marketing Descriptions		
Name	> >	Value
> Description, Long	abc	Enter new content here...
> Description, Table	abc	
> Description, Web	abc	

3. Make the appropriate changes to the attribute value and then hit Tab to leave the value field.

## Edit Multiple Products

1. Navigate to the relevant products in **Tree** and multi-select them to open up the multi-product editor.

The valid attributes for the selected products will appear on the right. To flip the columns & rows, either right-click & select **Rotate Table** or press F11. To view all products within a product group, select the group & then select the **Sub Products** tab on the right.

	20670-012	20808-012	20808-013
ID	17739	20808	101567
Name	20670-012	20808-012	20808-013
Object Type	SalesItem	SalesItem	SalesItem
Revision	0.7 Last edited by DANF on W...	0.2 Last edited by USER on Fri Jul 31 10:4...	0.1 Last edited by USEI
Path	Primary Product Hierarchy/Pro...	Primary Product Hierarchy/Products/Appar...	Primary Product Hiarar
Approved	✓ Approved on Wed Jul 15 1...	✗ Never Been Approved	✗ Never Been Appro
Translation	Not Translated	Not Translated	Not Translated
Default InDesign template			
Default Quark template			
Condition			
Parent	Hats and Caps SalesItems Products   Apparel   Head Wear	Hats and Caps SalesItems Products   Apparel   Head Wear   Hats and	Hats and Caps SalesIte Products   Apparel   He

### Multi-product Editor

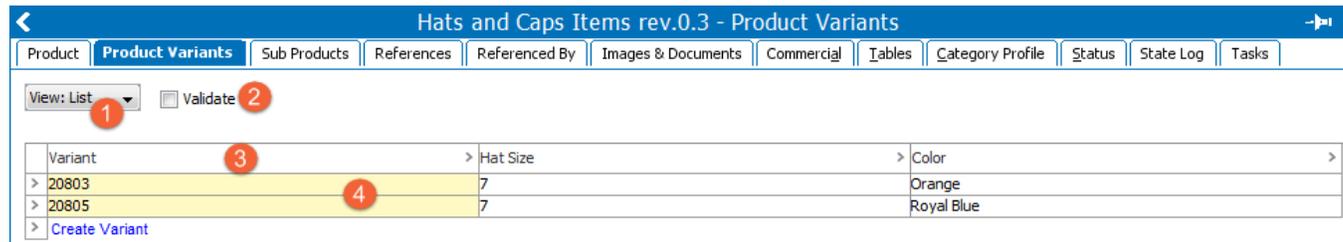
2. Type in the appropriate values in each cell.

### Additional Notes

- If the object has subfolders, a separate warning window will appear and ask the user if they wish to continue. Some attributes may have validation rules assigned to them. Users can tell this by the icon next to the attribute name. For example: **abc** means that there is a Text validation for this attribute. Values that are entered must conform to the preset validations. There are no exceptions.
- Some attributes may have a List of Values (LOV) to choose from. In this case, the user is presented with a dropdown list with a selection of choices. In some cases, users may be able to add additional values by typing directly in the LOV field.
- Copy/Cut & Paste - The editor will allow users to copy/cut & paste from other sources. These are similar to Excel in functionality.
- A large editor can be opened by pressing Alt+F2. For text based attributes the following short-cuts can be used in the large editor
  - Ctrl+Shift+Space: Inserts a non-breaking space
  - Ctrl+Y will open a style tag dialog
  - Ctrl+R will open a character tag dialog
  - Ctrl+H will open a special character dialog

# The Product Variants Tab

## List view



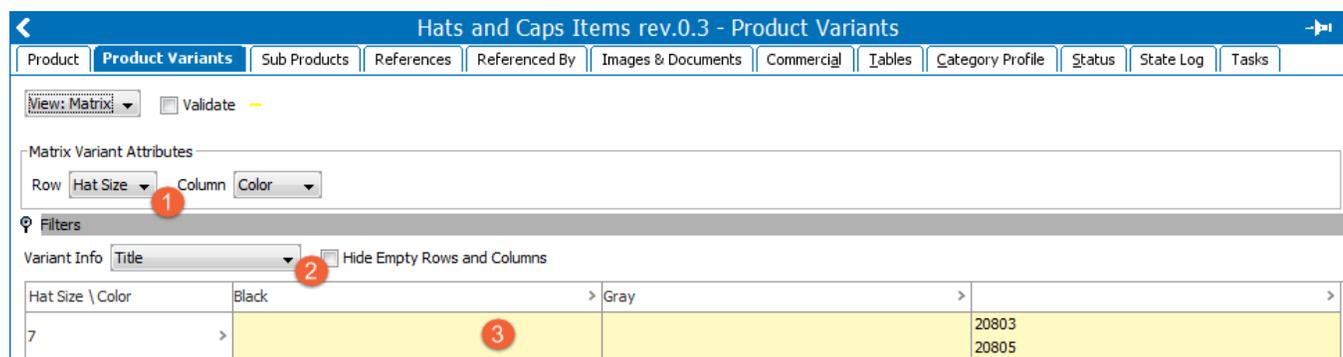
**1. View dropdown** - Dropdown for switching between List view and Matrix view.

**2. Validate checkbox** - When checked, products that have potential duplicates will be highlighted with a red background. Information about possible duplicates on a highlighted product is shown in a tooltip when hovering over the product. If no potential duplicates are found a green check mark will be shown next to the check box label.

**3. Variant attribute** - Column showing attributes marked as variant attributes. An attribute is marked as a variant attribute by linking the 'Super Product' (the product containing the variant products) to the desired attribute, and by setting a priority for that attribute.

**4. Variant attribute values** - The value of a variant attribute. Values can be changed by clicking the value and choosing another value from the drop down.

## Matrix view



**1. Row and Column** - Here you can specify which variant attributes should be shown as columns and which should be rows.

**2. Variant Info** - The dropdown is used to change between different views. Two views are available: "Title", which makes only the title visible in the matrix view and "Primary Image & title", which also displays an image in the matrix view if the primary image attribute contains an image.

**3. Matrix cell** - Products are grouped in cells defined by the variant attributes selected for rows and columns, making it easy to identify potential duplicates.

# The Sub Products Tab

Product	Product Variants	Sub Products	References
View: Show all			
Name	20803	20805	Test11189
ID	20803	20805	100703
Name	20803	20805	Test11189
Object Type	Item	Item	Item
Revision	0.12 Last edited by USER ...	0.2 Last edited by USER o...	0.1 Last edited by L
Path	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product Hie
Approved	Last Approved on Tue...	Never Been Approved	Never Been Api
Translation	Not Translated	Not Translated	Not Translated
Default InDesign template	Default InDesign template		
Default Quark template	Default Quark template		
LIPC	002567954136	002567954136	

- Viewing Menu** - This dropdown menu allows you to choose the different viewing modes to display what information you want to see. This grid view lets you see and edit attributes for the products under a parent node. The advantage of this view is that you may compare products on one screen rather than having to scroll to each individual product.
- List of Attributes** - All attributes with values used in each product under a parent group.
- List of Products** - Products that reside under the parent group.

---

**Note:** You have the option of highlighting the different values in each product by right-clicking and selecting the **Mark Different** option in the Object Details Screen.

---

**Note:** The grid view can also change in orientation.

---

# The References Tab

Product **References** Referenced By Images & Documents Commercial Tables Status State Log Tasks

**Document References**

Reference Type > Target > >

1 Owners Manual +  Manual EN 

**Image References**

Reference Type > Target > Thumbnail > >

2 Product Image +  blue cap  

**Ungrouped Classification Links**

Reference Type > Target > Condition > Supplier > >

3 Classifications  Suppliers 

**Ungrouped Product References**

Reference Type > Target > >

4 Product Referen... +  18207-012   
 20670-012 

**Index Words**

5 Inherited From > Index >

[Add Index Word](#)

**Publications**

6 ID > Name >

[Link to Publication or Section](#)

**Linked Attributes from Product Hierarchy**

7 Display Sequence > ID > Name > Attribute Groups > Inherited from >

Display Sequence	ID	Name	Attribute Groups	Inherited from
>	Hazmat	Hazmat	Attribute Group	Primary Product Hierarchy
>	PrimaryColor	Primary Color	Category Specific Attributes	Primary Product Hierarchy
>	Size	Size	Attribute Group	Primary Product Hierarchy

[Link to Attribute](#)

- Document References** - Documents that are linked directly to the currently selected product will display here.
- Image References** - Images that are linked directly to the currently selected product will display here.
- Classifications** - Product to Classification links will be shown here. It allows the currently selected product to be lined into Classifications.

Icons used for Link Types	Description
	Link Icon
	Link is inherited from a higher level in the Tree.

Icons used for Link Types	Description
	<p>Link Type is set to be Mandatory. A Link from Product to Classification will have to exist in order to Approve Product or Classification. If a Mandatory Link has not been established, Approval will be prevented.</p> <hr/> <p><b>Important:</b> The Approval check for Mandatory Product to Classification Links is determined by the ownership of the Product to Classification Link. The Ownership of a Link is setup on the Classification Object Types. For more information, see <b>Object Types and Structures</b> within the <b>System Setup</b> documentation.</p>

4. **Product References** - Shows Product to Product References. It allows the currently selected Product to be referenced to another Product.

Icons used for References	Description
	Reference Icon
	Reference is inherited from a higher level in the Tree. The inherited Reference can be overwritten.
	Reference is set as Mandatory.
	Reference is set as mandatory. A Reference is inherited from a higher level in tree. The inherited Reference can be overwritten.

5. **Index Words** - Allows you to link index words to the currently selected product. Index words are now maintained in a dedicated hierarchy where it is possible to maintain the word itself along with a sort word.
6. **Publications** - Publications that the currently selected Product is linked to will be displayed here.
7. **Linked Attributes** - Attributes that are linked directly to the selected product and attributes that were linked further up in the hierarchy (and are being inherited) will display here. The **Inherited from** column shows where the attribute is linked.

The first column under **Linked Attributes** always shows the Display Sequence attribute. The  (inherited) symbol in front of the row tells you if the Display Sequence attribute is inherited from a higher level in the hierarchy. If there is a  (inherited) symbol next to the number, the **value** of the Display Sequence attribute is directly taken from the Display Sequence value set on the Attribute itself.

In the **Attribute Groups** column, you can see if the attribute belongs to one or more Attribute Groups.

## The Referenced By Tab

1. **Referenced by Products, Classifications or Entities** - Products, Classifications and/or Entities that the current Object is referenced by will display here.
2. **Used By Product-Overrides** - Shows which Product-Override is based on a specific product and it also shows which Product-Overrides have the product as a child.
3. **Linked into Product-Overrides** - Shows if a Product is used in a Product-Override.
4. **Used by Match Code Objects** - Shows if a Product is being used in a Match Code.
5. **Used on Page** - Shows Pages saved back to PIM that Product is mounted on.
6. **Applied Privileges** - Shows which privileges are applied.
7. **Visible Sub-Products in Other Contexts** - Shows which Sub-Products are visible in another Context.

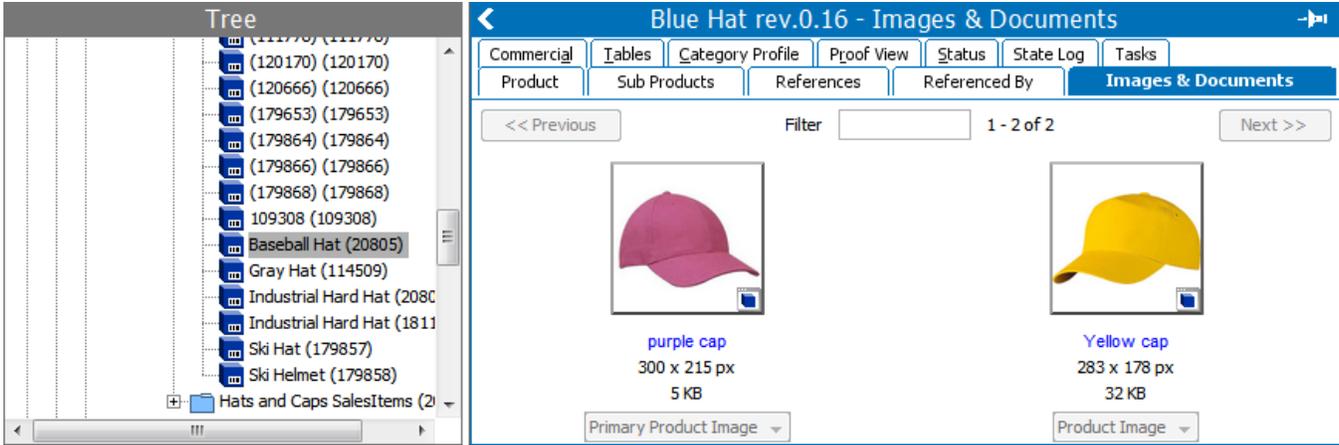
---

**Note:** Only if the Product hierarchy is dimension dependent.

---

# The Images & Documents Tab

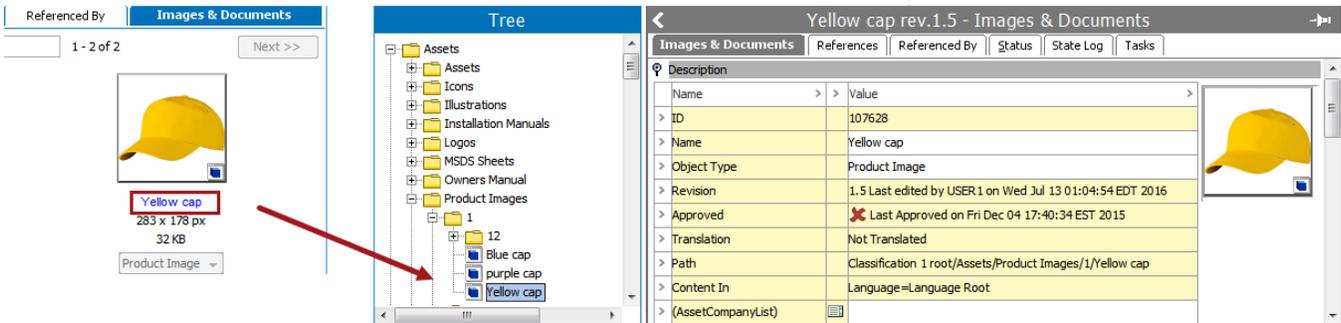
All images and documents linked to a selected product are displayed as thumbnail images on this tab. STEP also displays useful information for each asset. Asset name, pixel size, file size, and the asset reference type being used for linking display beneath each thumbnail. For more on image and document reference types, see the **Reference Types** topic in the **Super User Guide / System Setup** documentation.



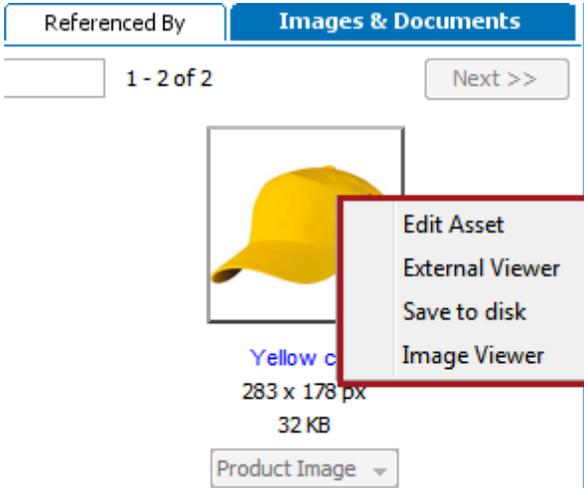
## Interacting with Assets on the Documents Tab

When a user is on the Images and Documents tab, they are able to interact with the assets in a number of ways.

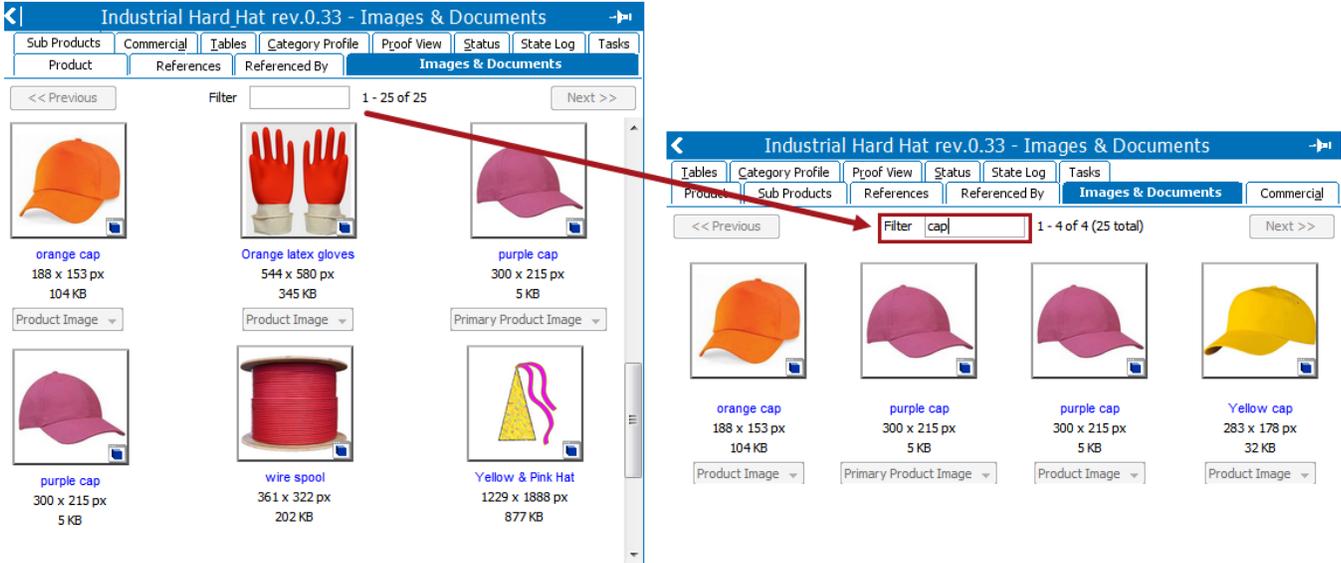
- They can click the asset name and be brought to where the actual images and documents reside in the classification folders.



- By right-clicking on the asset, users can edit any assets on the page, open an external viewer, save the image to a disk or local PC, and view the image on a larger scale.



- A user can also filter the images by entering the name of the asset in the 'Filter' field. This action displays assets that are matched to the name entered in the field. It is important to note that when using the filter, wild cards (\*) will not work. However, users can enter a few characters of the asset name, and STEP will find all of the assets which have these characters.



To remove the applied filter, users have to delete the characters in the filter field and press the Return / Enter key on their keyboard.

- Lastly, there are two buttons displayed at the top of the Images and Documents tab, **Previous** and **Next**, that allow the user to navigate to the next screen of linked assets when more than 50 assets are linked to a product.



# The Status Tab

Product	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Category Profile	Proof View	Status	State Log	Tasks																														
<b>1 Revisions</b> <table border="1"> <thead> <tr> <th>Revision</th> <th>Created</th> <th>Edited</th> <th>Major</th> <th>User</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>&gt; 0.4</td> <td>Fri Oct 23 16:49:50 EDT 2015</td> <td>Tue Jan 19 15:42:51 EST 2016</td> <td></td> <td>USER</td> <td>Auto Generated</td> </tr> <tr> <td>&gt; 0.3</td> <td>Fri Oct 16 09:39:06 EDT 2015</td> <td>Fri Oct 16 09:39:06 EDT 2015</td> <td></td> <td>USER</td> <td>Complete approval</td> </tr> <tr> <td>&gt; 0.2</td> <td>Tue Sep 22 14:14:02 EDT 2015</td> <td>Tue Sep 22 14:14:02 EDT 2015</td> <td></td> <td>USER</td> <td>Auto Generated</td> </tr> <tr> <td>&gt; 0.1</td> <td>Fri Feb 13 11:36:40 EST 2015</td> <td>Fri Feb 13 11:36:40 EST 2015</td> <td></td> <td>STEPSYS</td> <td></td> </tr> </tbody> </table>												Revision	Created	Edited	Major	User	Comment	> 0.4	Fri Oct 23 16:49:50 EDT 2015	Tue Jan 19 15:42:51 EST 2016		USER	Auto Generated	> 0.3	Fri Oct 16 09:39:06 EDT 2015	Fri Oct 16 09:39:06 EDT 2015		USER	Complete approval	> 0.2	Tue Sep 22 14:14:02 EDT 2015	Tue Sep 22 14:14:02 EDT 2015		USER	Auto Generated	> 0.1	Fri Feb 13 11:36:40 EST 2015	Fri Feb 13 11:36:40 EST 2015		STEPSYS	
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<b>2 Workspaces</b> <table border="1"> <thead> <tr> <th>ID</th> <th>Name</th> <th>Path</th> <th></th> </tr> </thead> <tbody> <tr> <td>&gt; Main</td> <td>Main</td> <td>Main</td> <td>0.4</td> </tr> <tr> <td>&gt; Approved</td> <td>Approved</td> <td>Main/Approved</td> <td>0.3</td> </tr> </tbody> </table>												ID	Name	Path		> Main	Main	Main	0.4	> Approved	Approved	Main/Approved	0.3																		
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<b>3 Translation</b> <p>Master : <input type="text"/></p> <table border="1"> <thead> <tr> <th>Source</th> <th>Target</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> </tr> </tbody> </table>												Source	Target	Status																											
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<b>4 Approval status in all contexts</b> <table border="1"> <thead> <tr> <th>Context</th> <th>Approval Status</th> </tr> </thead> <tbody> <tr> <td>&gt; Danish DK</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; English UK</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; English US</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; French Belgium</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; French Canada</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; French FR</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; Germany German</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> <tr> <td>&gt; Israel Hebrew</td> <td>✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015</td> </tr> </tbody> </table>												Context	Approval Status	> Danish DK	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> English UK	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> English US	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> French Belgium	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> French Canada	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> French FR	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> Germany German	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015	> Israel Hebrew	✘ Last Approved on Fri Oct 16 09:39:06 EDT 2015												
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<b>5 Hidden values</b> <table border="1"> <thead> <tr> <th>Attribute</th> <th>Visible in workspaces</th> <th>Visible in dimensions</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>&gt; Long Item Description</td> <td>Approved, Main</td> <td>Country=AllCountries, Language=en-US</td> <td>Red carpet worthy pumps in scarlet suede is sure</td> </tr> <tr> <td>&gt; Packaging Type</td> <td>Approved, Main</td> <td>Country=AllCountries, Language=std.lang.all</td> <td>Box</td> </tr> <tr> <td>&gt; Supplier Name</td> <td>Approved, Main</td> <td>Country=AllCountries</td> <td>Products Galore</td> </tr> </tbody> </table>												Attribute	Visible in workspaces	Visible in dimensions	Value	> Long Item Description	Approved, Main	Country=AllCountries, Language=en-US	Red carpet worthy pumps in scarlet suede is sure	> Packaging Type	Approved, Main	Country=AllCountries, Language=std.lang.all	Box	> Supplier Name	Approved, Main	Country=AllCountries	Products Galore														
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<b>6 Diagnostics</b> No problems found																																									

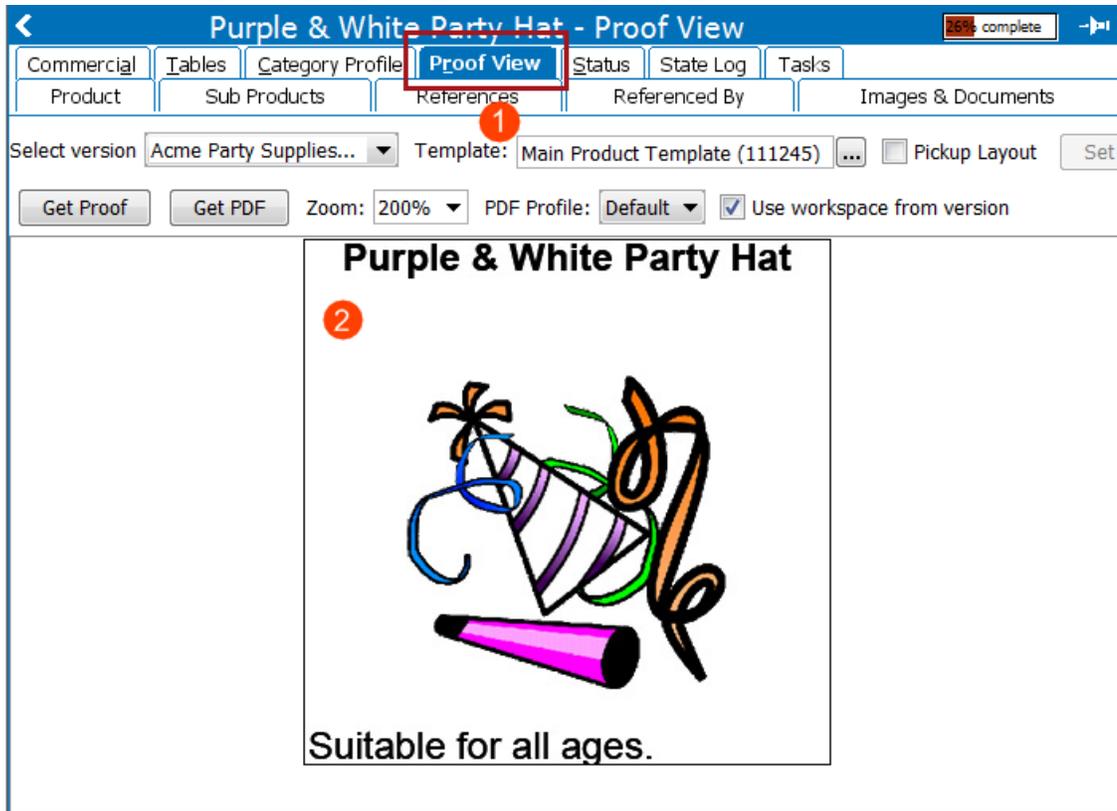
- Revisions** - A record of all the changes that have been made to a currently selected product will display here. This record will allow you to see the user that made the change and when the change was made.
- Workspaces** - All the workspaces that the selected products are in will display here.
- Translation** - All the translation relations and translation statuses will display here. For more information, see **About STEP Translation** within the **Translation** documentation.
- Approval status in all contexts** - Displays which contexts the product is approved in.
- Hidden Values** - Hidden inheritance value not associated with the product's parent. Usually this value is based on some other context such as language or country.
- Diagnostics** - Displays any ongoing issues associated with the topic.

# The Table Tab



1. **Tables** - All the table types that are relevant to the currently selected product will appear here.
  2. **Definition Sub-Tab** - Allows you to create columns and rows within a selected table type.
  3. **Preview Sub-Tab** - Allows you to preview a selected table type. You are also able to create table transformations which allow you to sort, insert rules, format, and merge or remove certain columns or rows.
- See **Setting Up Tables** within the **Tables** documentation for more information on table creation.

## The Proof View Tab



1. **Template** - The default template applied to the currently selected product will appear here.
2. **Proof View** - Allows you to preview a template for the currently selected product. This is a close representation of how it would look when mounted onto a page.

---

**Note:** For more information on template creation, please refer to the STEP'n'design User Guide.

---

# Product-Override

Product-overrides are alternate versions of products and product families that may have differing values, references, links, and structures. Attributes and values applied to the product family are inherited to the product-override and can be replaced with local values and references on the product-override.

**Note:** A product-override can include products from various product Families.

The screenshot displays the Stibo Systems interface. On the left is a 'Tree' view showing a hierarchical structure of folders and items. A red circle with the number '1' highlights the 'Product Overrides' folder, which is expanded to show 'Level 1' and 'Level 2'. Under 'Level 2', a specific product override '101609 -> SKU 00001' is selected. On the right is the 'Product' details view for '101609 -> SKU 00001 rev.0.1 - Product'. It features a navigation bar with tabs: 'Product', 'Sub Products', 'References', 'Referenced By', 'Images & Documents', 'Commercial', 'Tables', and 'Statu'. Below this is a 'Description' section with a table of attributes:

Name	Value
ID	101609
Name	101609
Object Type	Product-override
Revision	0.1 Last edited by USER on Tue Aug 04 11:18:17 EDT 2015
Approved	Never Been Approved
Translation	Not Translated
Path	Primary Product Hierarchy/Product Overrides/Level 1/Level 2/101609 -> SKU 00001
Overridden Product	SKU 00001 (SKU 00001)
Product Variant Priority	

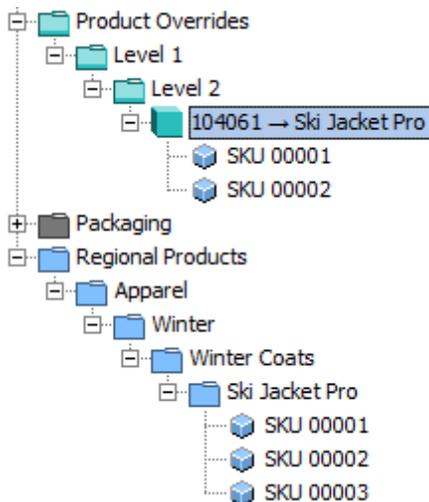
Below the description is an 'Attribute Group' section, also with a table:

Name	Value
Size	abc Medium

**1. Tree Structure** - The product-override option is only available in the product structure.

**2. Override Interface** - The product-override object makes it possible to override the children, attributes, and references of a product / product family. This is useful in order to publish a limited version of a product family without modifying the object itself.

Example of a Product-Override:



In this example a Product-Family **Ski Jacket Pro** has three products. A product-override **104061** is created and based on the product family **Ski Jacket Pro**. Attributes, values, and references are inherited from the product family **Ski Jacket Pro** to the product-override and can be replaced with local values and references on the product-override.

Later, two products from the product family **Ski Jacket Pro** are linked into the product-override: SKU 00001 and SKU 00002. The product-override only contains a subset of the products included in the original product family **Ski Jacket Pro**. The product-override has SKU 00001 and SKU 00002, but not SKU 00003.

---

**Important:** Values and references inherited to a product-override will not be inherited to products linked into the product-override. These products will have their values inherited from their original structure instead.

---

Selecting the Product tab or References tab on the product-override will indicate with a yellow icon, if a reference is inherited from an overridden product. In this example, the Primary Image reference is inherited from the product **Ski Jacket Pro**. The inherited reference can be replaced with a local reference.

Ungrouped Product References			
Reference Type		Target	
> Product References		18207-012	
		SKU 00001	

## Creating a Product-Override

1. In **Tree**, Select a Product Family
2. Right-Click and select **New Product-Override**
3. In the Create Product-Override dialog,
  - Click an Object Type
  - Key in ID and Name
  - **Optional:** Press the ellipses button [...] to select a product family to adapt values, references, and links from. The product-override will inherit all values, references, and links from the selected product family.

- **Optional:** Click 'Adapt Children' if the product-override should also include all products from the overridden product family.
4. Press **Create** to create the product-override.

### **Linking Products into a Product-Override**

1. In **Tree**, select the product-override
2. Right-click the product-override and select **Add Children to Override**
3. **Search** or **Browse** for the products to be linked into the product-override

### **Removing Products from the Product-Override**

1. In **Tree**, select the product-override
2. Expand the product-override and select the product to be removed
3. Right-click and select **Remove Child from Override**

### **Creating a Sub-Product-Override**

1. In **Tree**, select the product-override
2. Select a product linked into the product-override
3. Right-click the product and click **Convert to Product-Override**

The product will be converted into a product-override. Values, references, and links will get inherited from the overridden product.

## Entity Maintenance

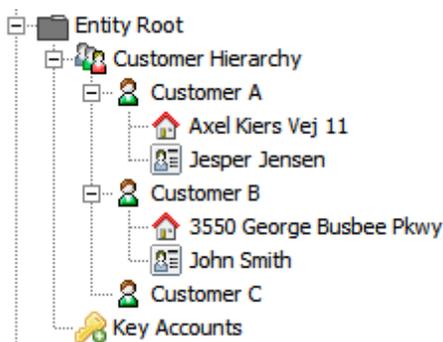
This section deals with Entities. In STEP terms, an Entity could be any object not defined as a product. Entities are commonly used to model customer related data such as contacts, addresses, markets or customers, though they can be used for any number of data modeling scenarios.

Compared to Products, Entities do not contain all of the Product specific functionality like GDSN tracking, packaging hierarchies, specification attributes, value inheritance, or tables. It is also not possible to publish Entities in printed form or to translate Entities using a background process.

However, Entities retain the standard data modeling capabilities and provide even more configurability, in that it is possible to define an entity object type that does not have to be approved. Entities can be created as globally revisable, meaning they are the same in both the Main and Approved workspaces.

## Entity Hierarchy

Any number of entity hierarchies can be added to any system. For example, you may set up address hierarchies, customer hierarchies, market hierarchies, and so on. All of these hierarchy types are set up via **Object Types and Structures**, which can be found in the **System Setup** documentation.



The above is an example of an Entity Hierarchy.

Entities are represented by icons chosen as part of the implementation process and will likely differ on each system.

A + sign signals that the entity contains child entities and can be expanded, while a - sign tells you it is already opened.

## Entity Values

Once the Entity Hierarchy is created and Description Attributes are applied to the Entity Object Types, the next logical step is to start entering values.

**Note:** It is not possible to link Specification Attributes into Entities. Only Description Attributes can be applied to Entity Object types and will appear in the Entity editor.

Address		References	Referenced By	Status	State Log	Tasks
Description						
Name	>	>	Value			
ID	>		ADD_101571			
Name	>		Axel Kiers Vej 11			
Object Type	>		Address			
Revision	>		0.1 Last edited by USER on Fri Aug 14 10:59:02 EDT 2015			
Path	>		Entity hierarchy root/Entity Root/Customer Hierarchy/Customer A/Axel Kiers Vej 11			
City	>	abc	Hojbjerg			
Country	>	abc	Denmark			
State	>	abc				
Street	>	abc	Axel Kiers Vej 11			
Zip	>	12a	DK-8270			

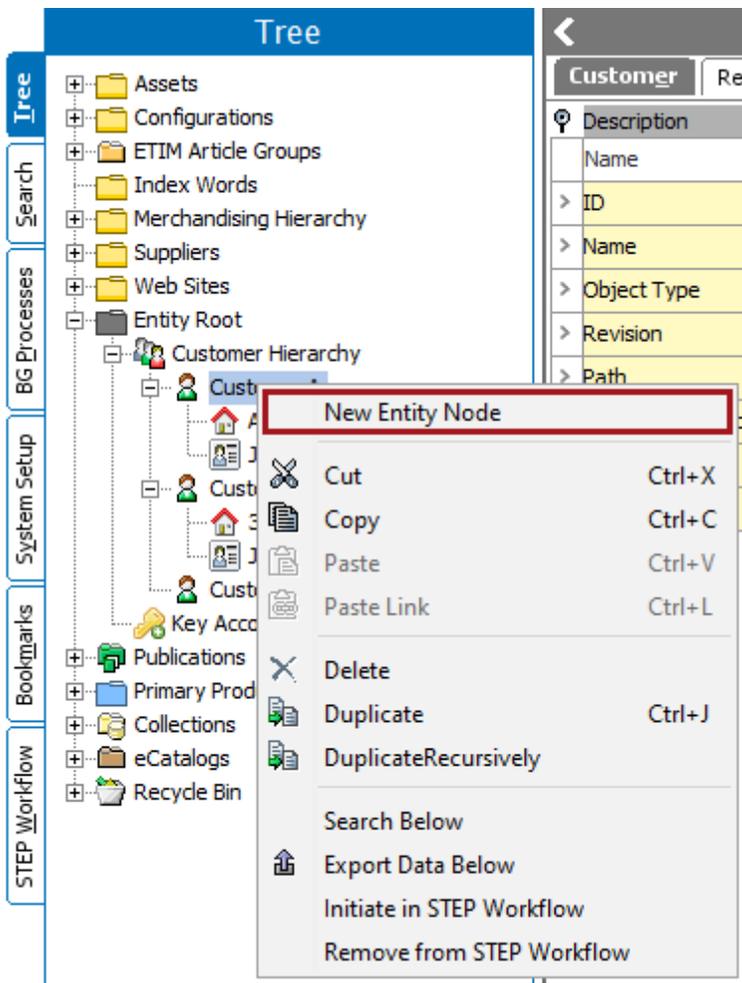
**An example of an Address:**

The figure above shows an Entity modeled as an Address. The Entity Object has 4 Description Attributes applied - City, Country, Street and Zip that can be maintained, as well as the Name. In this example, the Entity Object Type has been modeled to be Globally Revisable. For Globally Revisable entities, approval is not applicable and therefore the Approval status is not shown.

# Creating, Deleting, and Editing Entities

## Creating New Entities

1. Select the relevant Entity Object (in this example Customer). Right-click and select 'New Entity Node' from the context menu.

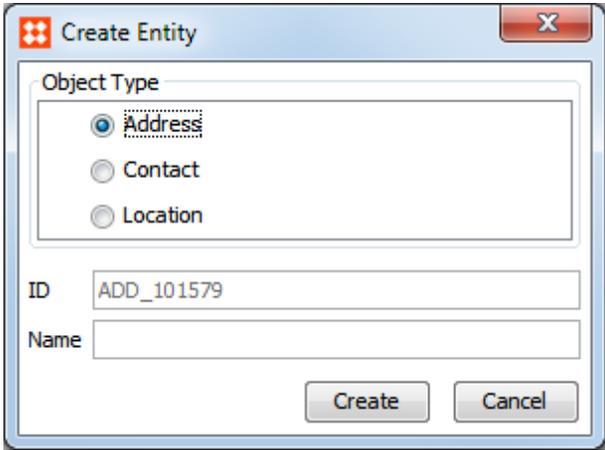



---

**Note:** Tree icons may appear different and are created by the customer according to preference.

---

2. Select the appropriate type of object to create (in this example Address). Type in the ID and Name of the new object. Depending on the parent object, the list below will contain different choices. The ID field must be unique. In some system setups, the ID is autogenerated (as in the example below) and will simply display the next number in a system list. In that case, just type in the name.



3. Select the **Create** button. The newly created Entity Object will appear.

### Deleting Entities

1. Select the Entity Object to be deleted. Right-click and select 'Delete' from the context menu.

### Editing Entity Values

Values can be maintained at the individual Entity Object or on a selected group of Entities.

**Note:** If a field is colored yellow, it cannot be edited. This is because the field is either inherited or not valid for the object type.

1. Multi-Select the relevant Entities by pressing the Control key to select desired Entities.

The valid attributes for the selected Entities will appear on the right. To flip the columns & rows, either right-click & select 'Rotate Table' or press F11.

	ADD_101571	ADD_107837
ID	ADD_101571	ADD_107837
Name	Axel Kiers Vej 11	3550 George Busbee Pkwy
Object Type	Address	Address
Path	Entity hierarchy root/Entity Root/	Entity hierarchy root/Entity Root/
City	Hojbjerg	Kennesaw
Country	Denmark	USA
State		
Street	Axel Kiers Vej 11	
Zip	DK-8270	

2. Type in the appropriate values in each cell.

Editing is similar to Excel editing. Pressing the tab key takes the focus to the next cell. Shift+Tab shifts the focus to the previous cell. F2 enters the cell. Alt+F2 will open a large editor with a dialog to assist keying in a valid value.

# Entity References, Referenced By, and Status Tabs

## References Tab

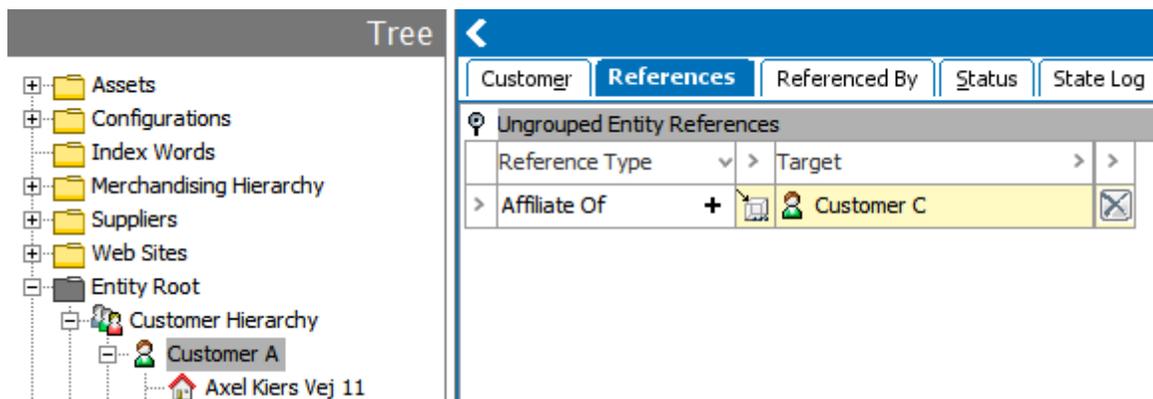
Selecting the References tab on an Entity Object will list valid References. In this tab it is possible to maintain references from the selected entity to other objects.

See **Reference and Link Types** in the **STEP Super User Guide** documentation for more information.

An entity can reference a number of difference objects. It is possible to create:

- Entity to Entity references
- Entity to Product references
- Entity to Classification references
- Entity to Asset references

In the example below one Entity to Entity reference type is valid on the selected entity object. Clicking the + will open a large editor where you can select objects to be referenced. Alternatively you can key in an object in one of the white target fields and press enter.



## Referenced By Tab

Selecting the Referenced By tab on an entity will list valid Reference Types. In this tab it is possible to maintain references from other objects to current entities.

See **Reference and Link Types** in the **STEP Super User Guide** documentation for more information.

An Entity Object can reference a number of difference objects. It is possible to create:

- Product to Entity
- Entity to Entity

- Asset to Entity
- Classification to Entity

In the example below, one Entity to Entity reference type is valid from an Entity to the current selected Entity Object. Clicking the + will open a large editor where you can select objects from where a reference to the current selected Entity Object should be made. In the example, a reference from an entity named 'Customer A' is made to the current selected Entity Object.

Customer	References	Referenced By	Status	State Log
Unique Identifiers				
Reference Type	>	Source	>	
Referenced by Objects				
Reference Type	>	Source	>	>
> Affiliate Of	+	Customer A		
Used by Match Code Objects				
ID	>	Name	>	

### Status Tab

A record of all the changes that have been made to a currently selected entity will be displayed here. This record will allow you to see the user that made the change and when the change was made.

Customer	References	Referenced By	Status	State Log	Tasks
Revisions					
Revision	>	Created	>	Edited	>
> 0.1		Thu Jul 30 14:53:26 EDT 2015		Fri Aug 14 10:58:36 EDT 2015	USER
Hidden values					
Diagnostics					

## Overview of Publication Maintenance

Before generating InDesign pages from STEP through any of the **STEP Publisher** components—STEP'n'design ('drag and drop'), STEP Flatplanner, STEP AutoPage, or STEP Publishing Web UI—it is necessary to build out a **publication hierarchy** (green hierarchy) in the STEP Workbench.

The topics in this section describe how to manually create the necessary objects in the **Tree** that compose a standard publication hierarchy. Instructions are also included for duplicating a publication and linking products, assets, and classifications to nodes (publications and sections) in the publication hierarchy.

Before creating any of the objects detailed in this section, you must first ensure that all relevant object *types* for the publication hierarchy have been created in **System Setup**. Instructions on how to create and configure these object types are detailed in the **Creating a Standard Publication Object Type Hierarchy** section of the **System Setup / STEP Super User Guide** documentation.

A publication hierarchy can also be built by importing a **STEPXML** or **Publication Excel** file. Details on these more automated methods of creating a publication hierarchy are not included in the **Publication Maintenance** documentation. For more information on building a publication and publication hierarchy through imports, see the following sections of the STEP online help / STEP user guides:

### STEPXML imports:

- **STEPXML Format** in the **STEP Import Manager** documentation
- **Managing Objects in AutoPage** in the **AutoPage** documentation

### Publication Excel imports:

- **Importing Publications in Excel** in the **STEP'n'design** documentation

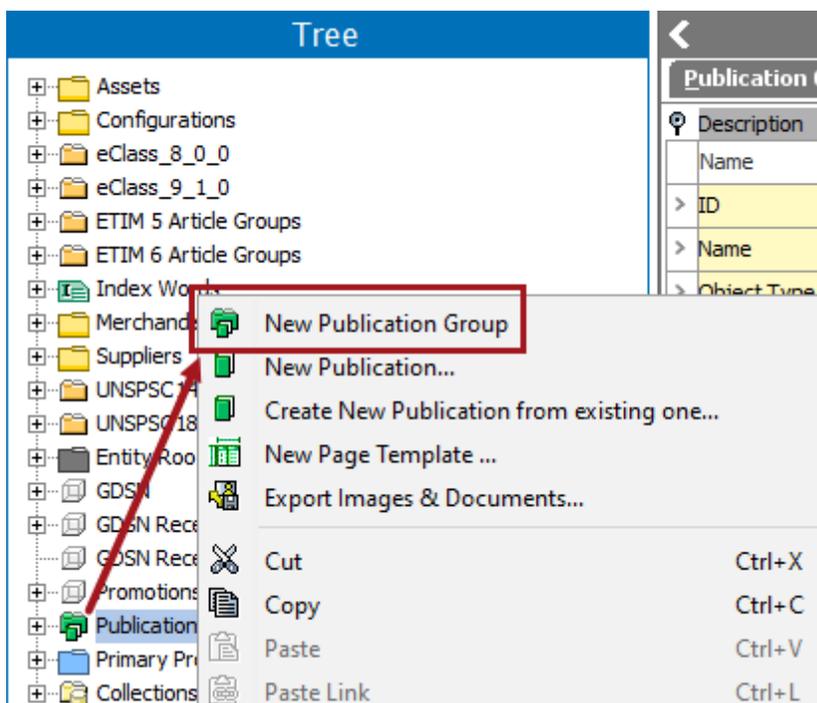
## Creating a Publication Group

Creating a publication group in the STEP Workbench is the first step in creating a publication after all necessary publication-related object types have been configured in System Setup. Publication groups not only serve as the parent nodes of publications, but at least one publication group must exist before publication templates and product templates can be saved back to STEP.

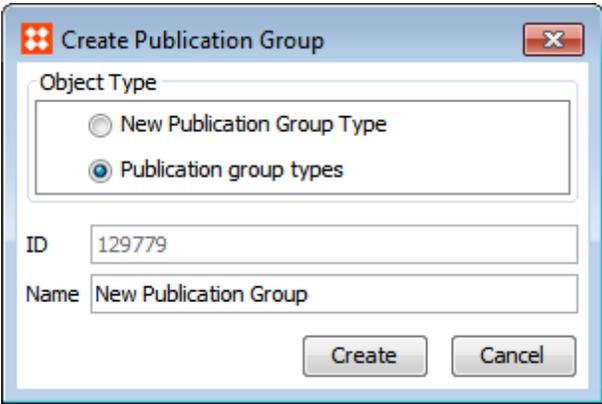
**Note:** Unless created by Excel or STEPXML import, publications cannot be created in STEP until at least one publication template and one product template has been saved back to the workbench. For instructions on how to configure and save these templates into STEP, see the **STEP'n'design** documentation.

### Steps to Create a Publication Group

1. In the **Tree**, click on the top level of the publication hierarchy (green tree node). The standard ID of this root node is **Publication hierarchy root**. If this root node does not exist on your system, contact Stibo Systems for assistance.
2. Right-click and select **New Publication Group**.



3. In the **Create Publication Group** dialog box that displays, click the relevant **Object Type**, if applicable.

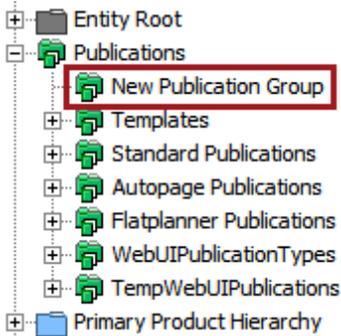


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**Note:** In order to choose an object type for your publication group, these object types must first be defined in System Setup. For more information, see **Creating a Publication Group Object Type** in the **System Setup / STEP Super User Guide** documentation.

---

4. Type an ID in the **ID** field if the STEP ID for your publication group object type has not been set to autogenerate with an ID Pattern in System Setup. (The preceding screenshot shows an ID that has been created automatically.)
5. In the **Name** field, type a name for the publication group.
6. Click **Create**. The publication group is created.



### A Note on Revisability

Publication Groups objects are globally revisable, meaning that they are the same in both the Main and Approved workspaces. Each time a change is made by a different user, a numbered revision is created and logged.

# Creating a Publication

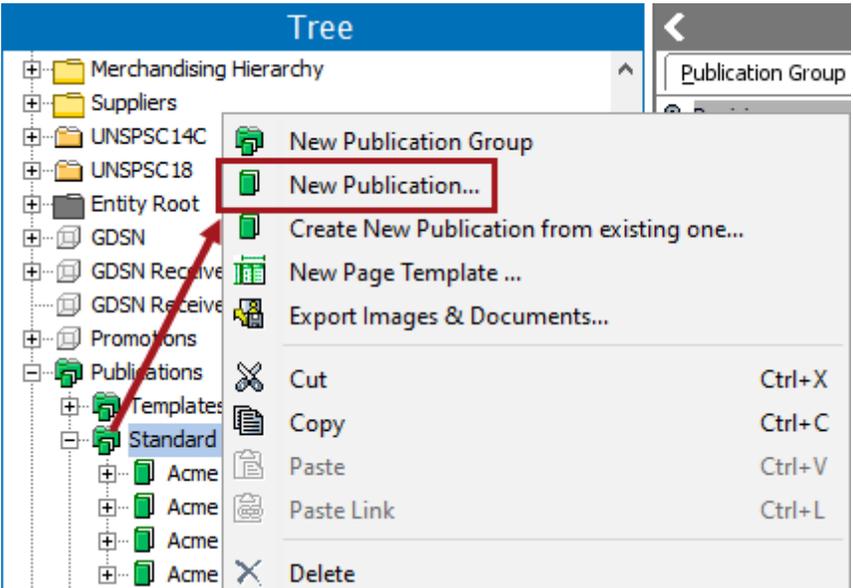
Publications are created in the green publication hierarchy in the Tree by the same basic process whether the publication will be used for standard STEP'n'design publishing ('drag and drop'), AutoPage, or Flatplanner.

Unlike the more straightforward method of creating objects in the Product or Classification hierarchies, all publications require the linkage of two types of STEP'n'design templates: publication templates and product templates. Flatplanner publications require three template types: publication templates, product templates, and page templates. These templates must already be saved in STEP before a publication can be created.

Though publications can be imported in STEPXML or Publication Excel formats, it is recommended to create your first publication in STEP manually. Once created, this publication can be exported to produce a 'template' spreadsheet that can be used for later publication imports.

## Steps to Create a Publication Manually in the Workbench

- 1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication group object in which you would like to create your publication.
- 2. Right-click this publication group object and select **New Publication**.



- 3. A **Create Publication** dialog box displays.

**Create Publication**

Publication

ID: 110167

Name:

Object Type: Publication

InDesign engine

Product Templates

Name >

> Add template

Page Templates

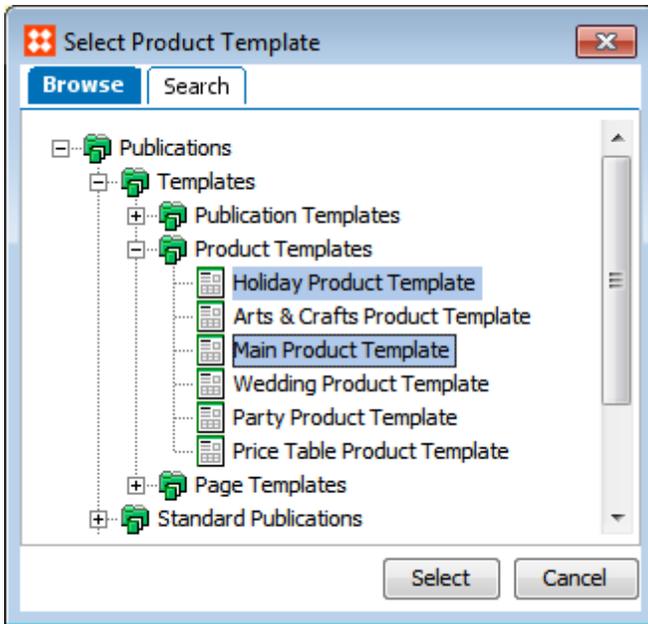
Name > Default >

> Add template

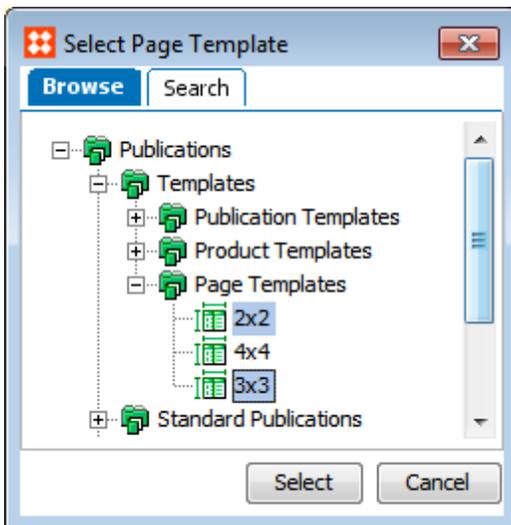
Publication Template ...

Create Cancel

4. If the STEP ID for your publication object type has not been set to autogenerate with an ID Pattern in System Setup, type an ID in the **ID** field. (The preceding screenshot shows an ID that has been created automatically.)
5. In the **Name** field, type a name for the publication (a name is required for publications).
6. In the **Object Type** list, select a publication object type (only applicable if more than one publication object type has been created in System Setup).
7. In standard STEP systems there will be only one choice of engine—**InDesign engine**. If a **Quark engine** is required, contact Stibo Systems for assistance.
8. Under the **Product Templates** flipper, click **Add template**. A **Select Product Template** dialog appears. Either search or browse for the product template(s) that you would like to use in your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished.



9. (For Flatplanner publications only) Under the **Page Templates** flipper, click **Add template**. A **Select Page Template** dialog appears. Either search or browse for the page template(s) that you would like to use in your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished. (You can add page templates after creating the publication if the page templates are not already in STEP.)



- A green check mark will appear next to the first page template to indicate that it is the default page template for the publication. To change the default template, click in the empty **Default** cell next to the page template that you would like to make default.

**Create Publication**

Publication

ID: 123812

Name: Acme Shoes

Object Type: Publication

InDesign engine

Product Templates

Name	
> Holiday Product Template	
> Add template	

Page Templates

Name		Default	
> 2x2		<input checked="" type="checkbox"/>	
> 4x4		<input type="checkbox"/>	
> 3x3		<input type="checkbox"/>	
> Add template			

Publication Template:  ...

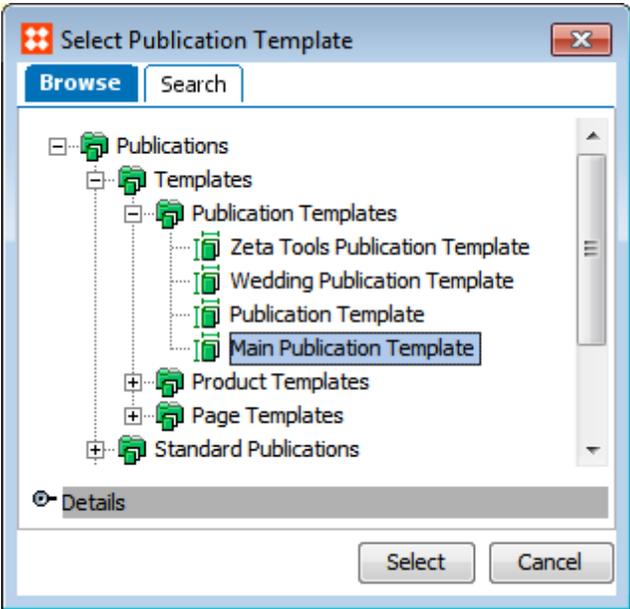
Create Cancel

9. In the **Publication Template** field, click the ellipsis button. A **Select Publication Template** dialog appears. Either search or browse for the publication template that you would like to use in your publication. Click **Select** when finished.

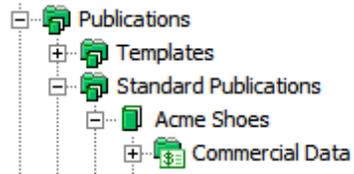
---

**Note:** Only one publication template is allowed per publication, as it is the master reference for all page sizes, paragraph styles, object styles, character styles, colors, and table rule settings in your publication.

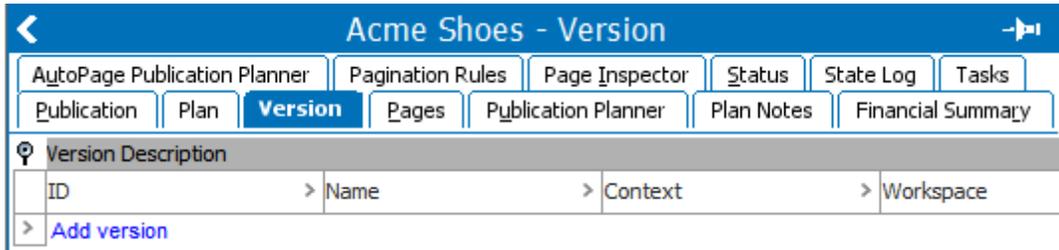
---



10. Click **Create**. The publication will now be created together with a **Commercial Data** folder. The Commercial Data folder is created by default with every publication object. Though it cannot be deleted, it will not negatively impact the publication if it remains empty.



11. Once the publication is created, the system will automatically route to the **Version** tab.



12. Before proceeding further with publication creation, you must create at least one publication **version**. For instructions on creating a version, see **Creating and Removing a Version** in the **Publication Maintenance** documentation.

## Creating and Removing a Publication Version

Once a publication object has been created, the next step in completing a publication is to create at least one **version**. Publications need at least one version to define the context(s) and workspace(s) that will be used within the publication. Multiple versions are created when there are multiple languages being used within the same publication. For example, if the publication will be published in five languages, then five versions will be created.

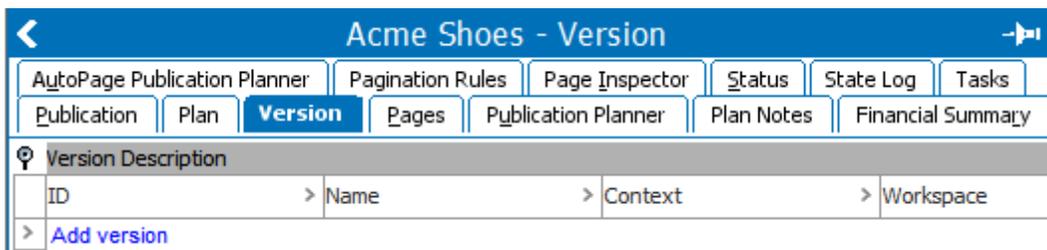
---

**Note:** Publication sections cannot be created until at least one version has been defined.

---

### Creating a Version

1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication in which you would like to create your version.
2. Select the **Version** tab. The **Version Description** flipper displays.



3. Click **Add version**. A **Create Version** dialog box displays.

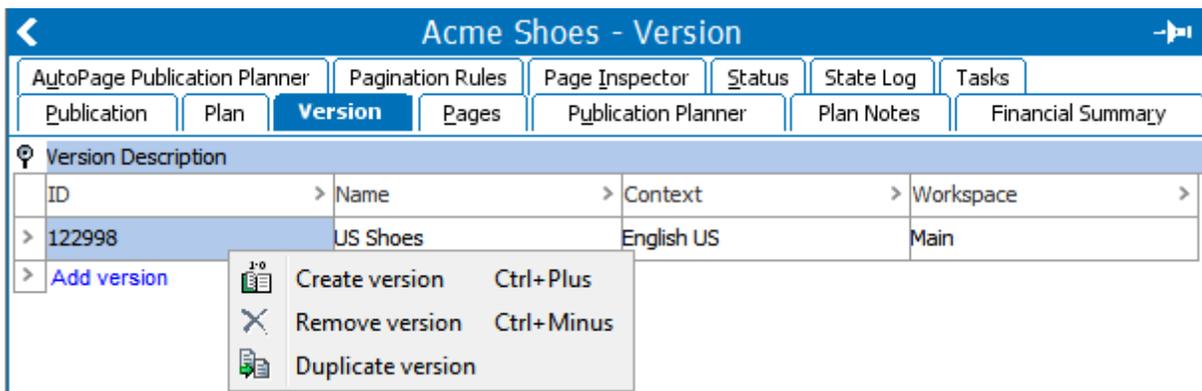
The screenshot shows the 'Create Version' dialog box. It has a title bar with a close button. The dialog contains four input fields: 'ID' with the value '122997', 'Name' (empty), 'Context' with a dropdown menu showing 'English US', and 'Workspace' with a dropdown menu showing 'Main'. At the bottom, there are two buttons: 'Create' and 'Cancel'.

4. If the STEP ID for the 'Publication Version' object type has not been set to autogenerate with an ID Pattern, type an ID in the **ID** field.
5. In the **Name** field, type a name for the version.
6. From the **Context** dropdown list, select the context from which the product data should be published.

7. From the **Workspace** dropdown list, select the workspace from which the product data should be published.
8. Click **Create** to create the version.
9. Create the number of versions needed by repeating steps 1 - 9 or by duplicating the version you just created. Note that the name, context, and workspace can be changed after creating a version.

## Removing or Duplicating a Version

1. To remove a version, right-click on the version that you want to remove from the publication, then select **Remove version**. The version will be removed.
2. To duplicate your version, right-click on the version that you want to duplicate, then select **Duplicate version**. The version will be duplicated.

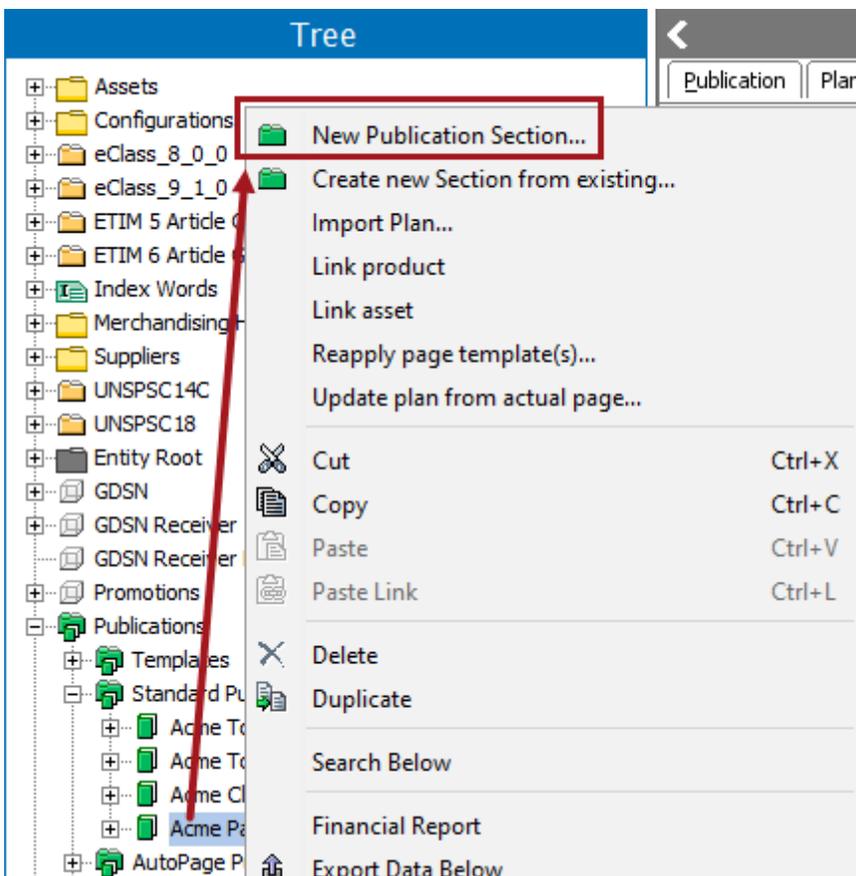


## Creating a Section

After creating a publication object with at least one version, the next step in completing your publication is to create at least one **section**. Sections are required for storing mounted (actual) InDesign pages in STEP as well as creating Flatplanner planned pages (spreads).

### Steps to Create a Section

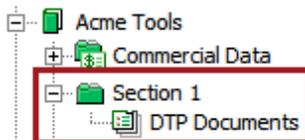
1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication object in which you would like to create your section.
2. Right-click this publication object and select **New Publication Section**.



3. In the **New Section** dialog that displays, select the relevant section **Object Type** (only applicable if more than one section object type has been created in System Setup).

4. In the **ID** field, type the ID of the section (if not generated automatically).
5. In the **Section Name** field, type a name for your section. If no name is provided, STEP will automatically name the section with the STEP ID of the section surrounded by parentheses, e.g., (123005).
6. If your system does not contain the STEP Flatplanner publishing component, no additional configuration steps are required. Click **Create** to create the section.

The **DTP Documents** node is automatically created along with sections. The DTP Documents node is used to store mounted (actual) InDesign pages in STEP.

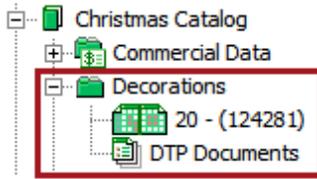


## Additional Steps for Flatplanner Publications

For systems that contain the STEP Flatplanner publishing component, the fields within the **Pages** section of the **New Section** dialog must be populated before the section can be created.

1. In the **First pagenumber** field, type the page number at which the planned pages in the section should begin. (For new sections, the default page number is 1. For subsequent sections in the same publication, the page number will pick up after the last page number in the previous section.)
2. In the **Number of pages** field, type desired number of planned pages that should be created along with the section.
3. In the **Page Template** dropdown, choose the page template that should be used for the planned pages in the section. To create a section without any planned pages, enter '0' for **Number of pages**. (Note that planned

pages cannot be named at the time sections are created. If names are required, they must be added after the planned pages have been created.)



---

**Note:** It is also possible to add sections to a Flatplanner publication using the **Publication Planner**. For more information about the Publication Planner, see **Inserting Sections in A Publication in Publication Planner** in the **Flatplanner** documentation.

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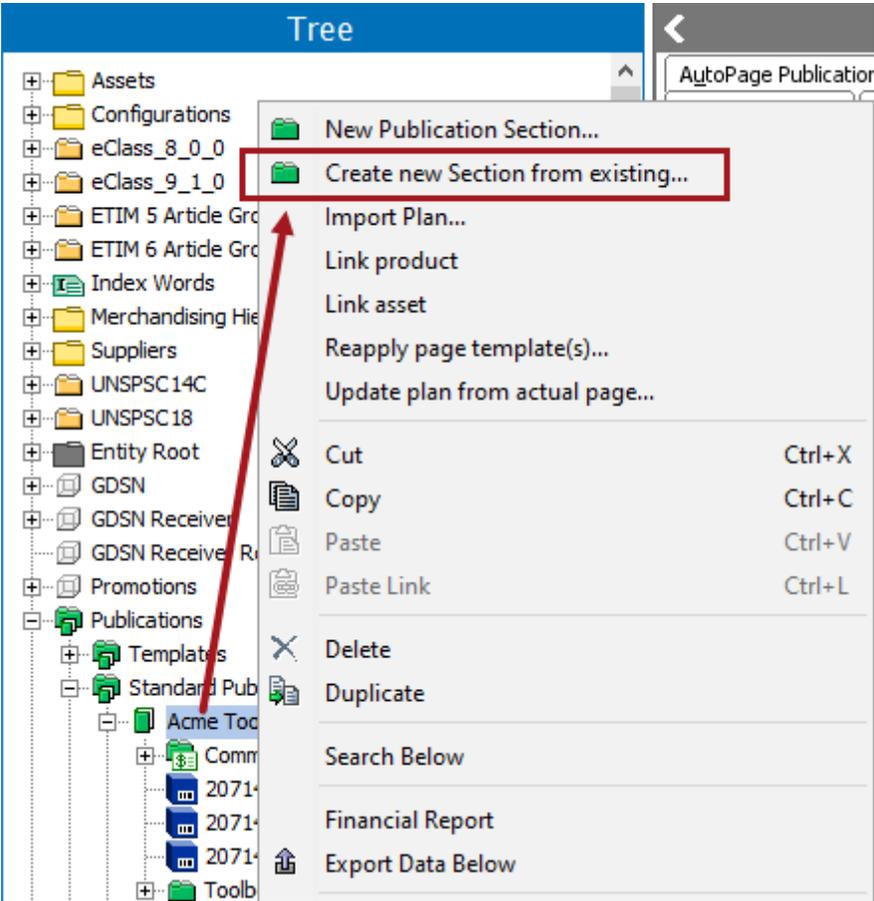
## Create a New Section From Existing

Creating a new section from an existing section is a useful feature that can help reduce time spent on manual tasks such as:

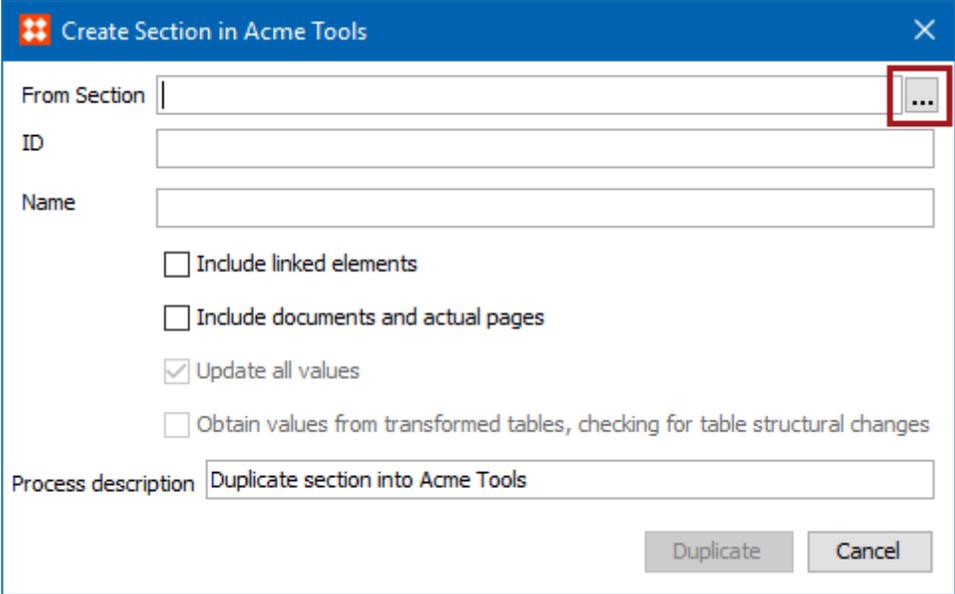
- Reassigning of product templates on Flatplanner pages
- Remounting of attribute values on pages
- Re-saving of InDesign pages into STEP

### Steps to Create a New Section From Existing

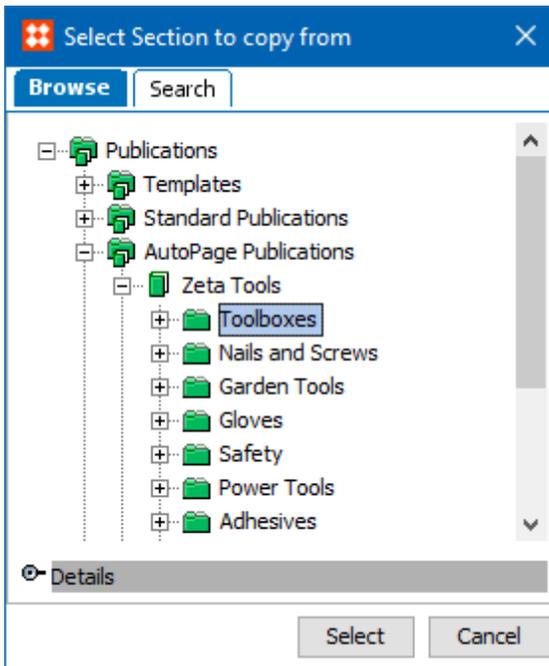
1. In the **Tree**, navigate to the publication or section where you would like to create the new section.
2. Right-click and select **Create new Section from existing....**



- 3. In the **Create Section** dialog that displays, click the ellipsis button (...) by the **From Section** field. (Or, type the name or ID of the section into this field.)



- In the **Select Section to copy from** dialog, browse to or search for the relevant section, then click **Select**.



- Type an ID in the **ID** field if the STEP ID for your section object type has not been set to autogenerate with an ID Pattern in System Setup. (The following screenshot shows an ID that has been created automatically.)
- Type a name for the section in the **Name** field.
- Select **Include linked elements** to carry over the product and asset objects that are linked to the source section.
- To keep all mounted (actual) pages from the original section, select **Include documents and actual pages** . (For Flatplanner publications, a duplicated section will still contain all *planned* pages even if this checkbox is not selected.)
- If **Include documents and actual pages** is selected, the **Update all values** checkbox is activated and the **Destination Version** and **Source Version** options display.
- Under **Source Version**, choose the relevant publication version (from the source section) from the dropdown list(s). This will essentially 'map' the actual pages from the source section into the relevant Destination Version in the destination section.

**Create Section in Acme Tools**

From Section: Toolboxes (177998) ...

ID: 182916

Name: Portable Toolboxes

Include linked elements

Include documents and actual pages

Update all values

Obtain values from transformed tables, checking for table structural changes

Destination Version	Source Version
French FR	French FR
English US	English US

Process description: Duplicate section into Acme Tools

Duplicate Cancel

11. Check **Update all values** if you would like the actual (mounted) pages in the new section to be updated with all changes made to attribute values in STEP since the time that the original pages were mounted.

---

**Note:** 'Update all values' will update *all* attributes from the original section. There is no way to choose a subset of attribute values to update when duplicating a section.

---

12. The checkbox for **Obtain values from transformed tables, checking for table structural changes** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, checking for table structural changes** if the following statements apply:

- Mounted tables exist on the actual pages of the original section
- Attribute values within these tables have changed in STEP since the original section was created
- You would like to update the values contained in the table cells but do *not* want to completely remount the tables

Updated table cell values will be populated as they exist in the resolved table in STEP, i.e., the way the table appears in STEP after all transformations have been applied.

---

**Note:** Any *new* transformations applied to tables since the original section was created will not be applied to the updated tables in the new publication.

---

If **Obtain values from transformed tables, checking for table structural changes** is *not* selected, all tables will be remounted in the new section. Remounting a table will update the tables with any changes made in STEP but will also cause the loss of any manual table formatting that was applied to the tables in the original section. Manual formatting includes changes such as the adjustment of column widths or addition of background shading to cells.

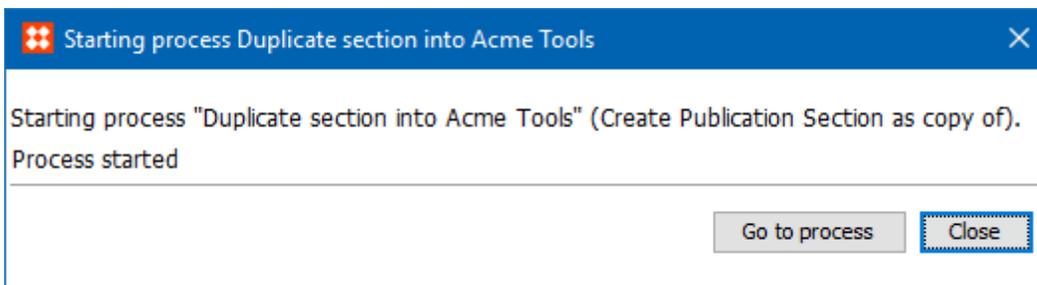
If the actual structure of a table itself has changed in STEP since the table was mounted in the original section, the table will be remounted in the new section regardless of whether **Obtain values from transformed tables, checking for table structural changes** is checked or not. A basic example of a structural change to a table is the addition or removal of a row or column.

---

**Note:** A configuration property can be set to allow values to update in tables—without remounting—even if structural changes are present. For more information, see the **Preventing the Remount of Structurally Different Tables in Duplicated Publications** section of the **Duplicating a Publication** topic.

---

13. In the **Process description** field, you may enter a name for the background process that will run when starting the duplication, though a name is not required.
14. Click **Duplicate**. A 'Create Publication Section as copy of' background process starts and a **Starting process** dialog box appears.

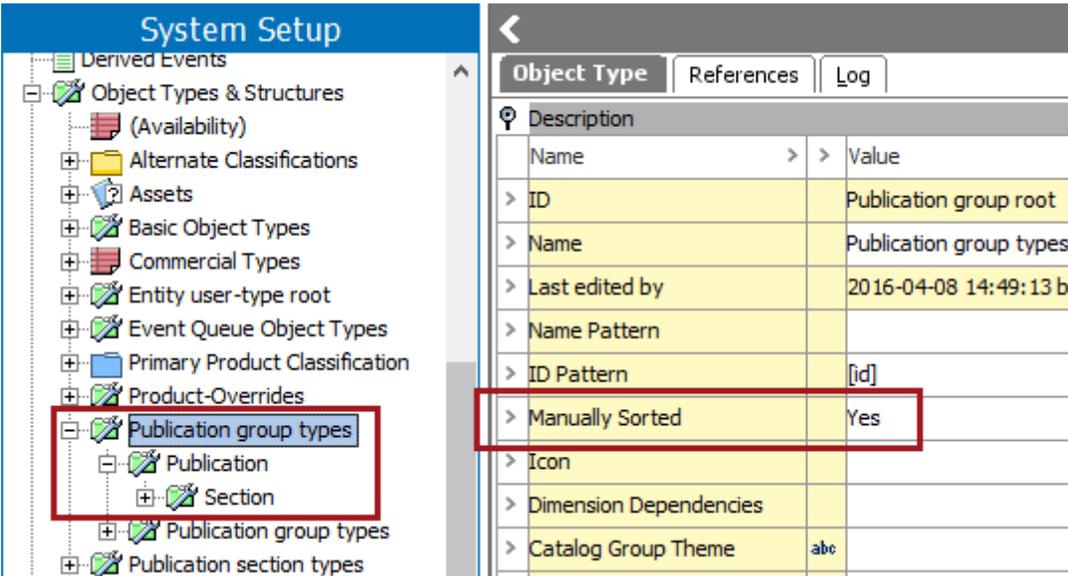


15. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
16. Once the background process has finished, the new section can be found as a child object inside the publication or section from which the duplication process was started.

# Organizing Publication Sections in STEP

Sections and subsections in publications can be manually organized in the Tree through simple drag-and-drop operations as long as the following object types are set to **Manually Sorted** = Yes:

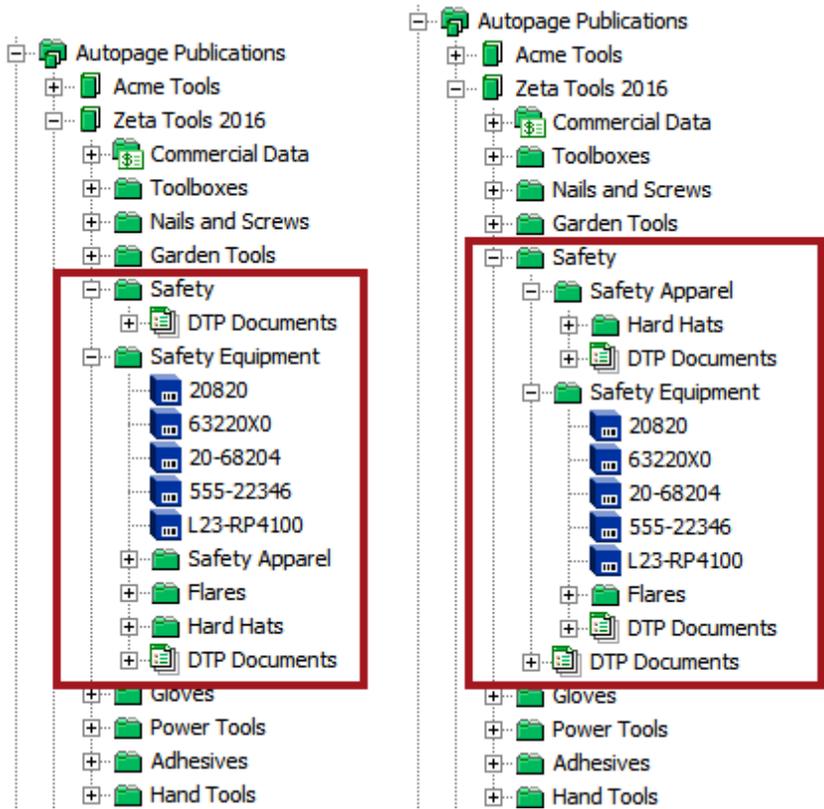
- Publication Group (typically, the object type with the STEP ID 'Publication group root')
- Publication (typically, the object type with the STEP ID 'Default publication type')
- Section (typically, the object type with the STEP ID 'Section')



Subsections may be dragged and dropped out of their parent sections and promoted to higher-level subsections or top-level sections. Likewise, sections may be dragged and dropped into other sections, enabling the 'demotion' of sections to subsections.

This functionality simplifies the maintenance of more complex publications where multiple levels of organization are needed.

The following screenshots show a 'before' and 'after' example of sections and subsections rearranged in the Tree through drag and drop. The 'before' image (left screenshot below) shows two top-level sections ('Safety' and 'Safety Equipment') with three subsections below the 'Safety Equipment' section. The 'after' image (right screenshot below) shows an updated order, with 'Safety' as the parent section and multiple levels of subsections beneath.



**Note:** Sections may still be rearranged by drag and drop in the Tree if **Manually Sorted** is set to **No** on publication group, publication, and section objects, but the sections will automatically arrange themselves in alphabetical order.

Templates (Publication, Product, and Page) may also be manually sorted in the Tree if **Manually Sorted** is set to **Yes** on the publication group object type. See the **Sorting Templates in STEP** section of the STEP'n'Design documentation for more information.

For more information about object type sorting in STEP, see the **Manually Sorted** section of the **System Setup / STEP Super User Guide** documentation.

## Duplicating a Publication

To simplify the creation of new publications that are similar to existing ones, duplicating a publication is a useful feature that can help reduce time spent on manual tasks such as:

- Remapping of import configurations for commercial data
- Reconfiguration of layer mappings
- Resaving of mounted (actual) pages into STEP

A common use case for needing to duplicate a publication is when a catalog is very similar from year to year. When it is time to produce the latest catalog, the publication from the previous year can be duplicated.

### Steps to Duplicate a Publication

1. In the Tree, open the top-level node of the publication hierarchy, then navigate to the publication that you would like to duplicate.
2. Right-click and select **Duplicate**. A **Duplicate** dialog box appears.

The screenshot shows a 'Duplicate' dialog box with the following fields and options:

- ID:** 123354
- Name:** Acme Party Supplies(2)
- Include documents and actual pages
- Update all values
- Obtain values from transformed tables, checking for table structural changes
- Include commercial information
- Include linked elements.
- Process description:** Duplicate Acme Party Supplies
- Buttons:** Duplicate, Cancel

3. In the **ID** field, type the ID of the publication (if not generated automatically).
4. In the **Name** field, type a name for the publication.
5. To keep all mounted (actual) pages from the original publication, select **Include documents and actual pages**. (For Flatplanner publications, a duplicated publication will still contain all *planned* pages even if this checkbox is not selected.)

---

**Note:** An InDesign server must be connected to your STEP system in order to duplicate actual pages into a new publication. If you select **Include documents and actual pages** and your system is *not* connected to an InDesign server, the publication duplication process will fail. For more information on the deployment of an InDesign server, contact Stibo Systems.

---

6. The checkbox for **Update all values** is activated if **Include documents and actual pages** is selected. Select **Update all values** if you would like the actual (mounted) pages in the new publication to be updated with all changes made to attribute values in STEP since the time that the original pages were mounted.
- 

**Note:** 'Update all values' will update *all* attributes from the original publication. There is no way to choose a subset of attribute values to update when duplicating a publication.

---

7. The checkbox for **Obtain values from transformed tables, checking for table structural changes** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, checking for table structural changes** if the following statements apply:

- Mounted tables exist on the actual pages of the original publication
- Attribute values within these tables have changed in STEP since the original publication was created
- You would like to update the values contained in the table cells but do *not* want to completely remount the tables

Updated table cell values will be populated as they exist in the resolved table in STEP, i.e., the way the table appears in STEP after all transformations have been applied.

---

**Note:** Any *new* transformations applied to tables since the original publication was created will not be applied to the updated tables in the new publication.

---

If **Obtain values from transformed tables, checking for table structural changes** is *not* selected, all tables will be remounted in the new publication. Remounting a table will update the tables with any changes made in STEP but will also cause the loss of any manual table formatting that was applied to the tables in the original publication. Manual formatting includes changes such as the adjustment of column widths or addition of background shading to cells.

If the actual structure of a table itself has changed in STEP since the table was mounted in the original publication, the table will be remounted in the new publication regardless of whether **Obtain values from transformed tables, checking for table structural changes** is checked or not. A basic example of a structural change to a table is the addition or removal of a row or column.

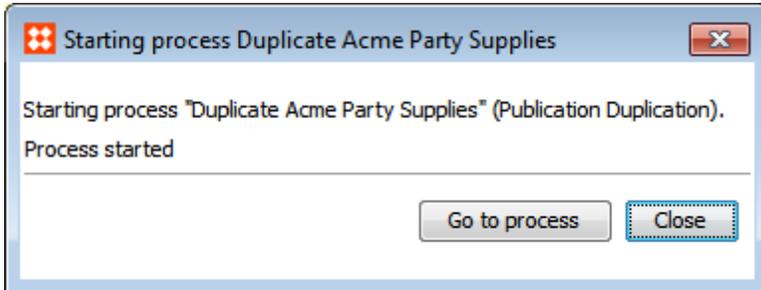
---

**Note:** A configuration property can be set to allow values to update in tables—without remounting—even if structural changes are present. See the **Preventing the Remount of Structurally Different Tables in Duplicated Publications** section later in this topic for more information.

---

8. Select **Include commercial information** to duplicate the commercial lists and commercial data import configuration(s) into the new publication.
9. Select **Include linked elements** to carry over the product and asset objects that are linked to the sections in the original publication.

10. In the **Process description** field, you may enter a name for the background process that will run when starting the duplication, though a name is not required.
11. Click **Duplicate**. A Publication Duplication background process starts and a **Starting process** dialog box appears.

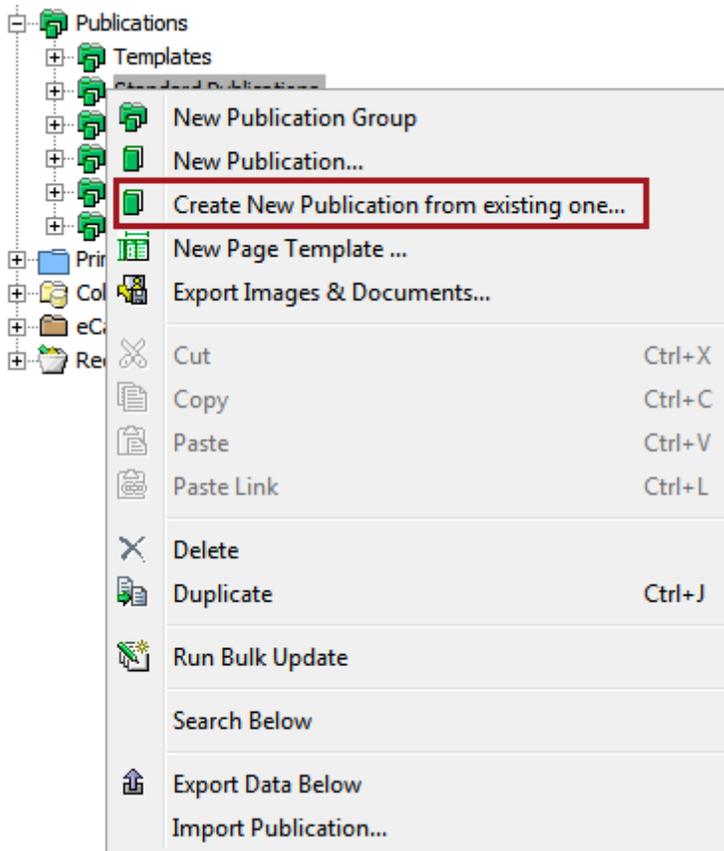


12. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
13. Once the background process has finished the new publication can be found in the Tree .

## Create a New Publication from Existing

Another method of duplicating a publication in STEP is to create a new publication from an existing publication. This method is ideal if you do not want to locate the existing publication, duplicate it, then cut and paste or drag and drop the duplicated publication from the 'old' location to the 'new' location.

1. Locate the publication group where you would like to create the new publication.
2. Right-click and select **Create New Publication from existing one....**



3. Browse to or search for the publication that you would like to duplicate. Click **Select**.
4. The same **Duplicate** dialog box as described in step 2 of the 'Steps to Duplicate a Publication' section of this topic (above) displays.
5. Follow steps 3 - 11 as outlined in that section to create your new publication.

## Preventing the Remount of Structurally Different Tables in Duplicated Publications

To prevent tables with structural differences from remounting in a duplicated publication, a config property may be added to the sharedconfig.properties file on the STEP application server. This property is **InDesign.TableMissMatch**.

```
#Other
InDesign.TableMissMatch = 1
```

- If **Obtain values from transformed tables, checking for table structural changes** is selected during the publication duplication process and **InDesign.TableMissMatch** is set to = 1, then tables with structural differences will *not* remount in the duplicated publication. Attribute values in the table will update but the table structure will not change. Manual formatting from the original publication will also remain.

- If **Obtain values from transformed tables, checking for table structural changes** is selected and **InDesign.TableMissMatch** is set to = 2, tables with structural differences will remount and manual formatting will be lost.
- If **Obtain values from transformed tables, checking for table structural changes** is selected and **InDesign.TableMissMatch** is set to = 3 (or any other value), tables with structural differences will be skipped. Values will not be updated, nor will tables be remounted.

## Considerations and Limitations

If the possibility exists that a large number of attribute values have been changed in STEP since the time that the original publication was completed, it is not recommended to update all values during publication duplication by selecting the **Update all values** checkbox. It is recommended instead to duplicate the publication with the original values intact, then update the values on the duplicated pages afterward from within InDesign.

The reasons for this recommendation are:

- Updating attribute values by clicking **Update all values** is an 'all or nothing' scenario. The data update options under the STEP menu in InDesign—including **Update Document Data** and **Check DB Update**—allow greater flexibility in what should be updated, including the ability to update values from specific attribute groups only.
- Updating data in InDesign also allows for values to be updated in text but not in tables. Updating values in tables all at once during publication duplication can provide unpredictable results if there have been structural changes made to the tables since the creation of the original publication.

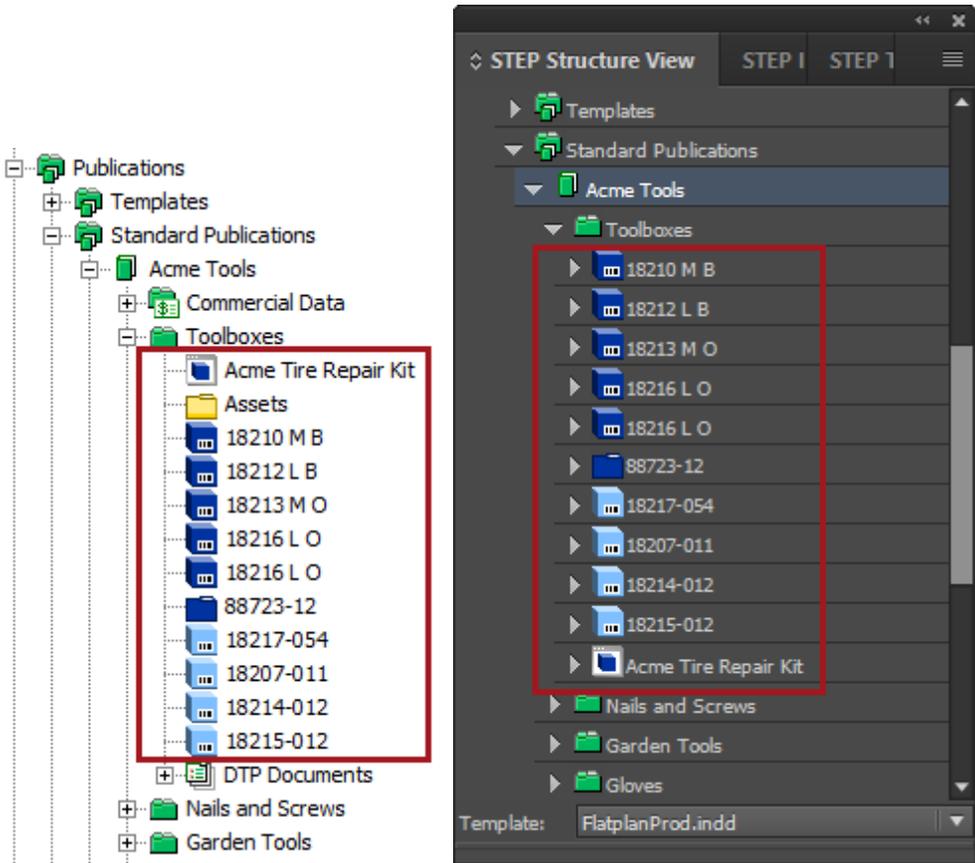
# Linking and Unlinking Publication Products, Assets, and Classifications

Product, asset, and classification objects may be linked to publication **sections** in the **publication hierarchy**. Product and asset objects (but not classifications) may also be linked to **publications**.

Linking products and assets to a publication at the top level can be a useful way to make a 'collection' of objects available for the entire publication. Linking products, assets, and classifications to publication *sections* is a useful way to further organize these objects for DTP operators. This organization helps to eliminate guesswork for DTP operators as they choose objects from STEP to mount ('drag and drop') onto pages in InDesign.

Linking these objects directly to publications and sections also eliminates the need to organize them in an alternate classification hierarchy.

Linked products, assets, and classifications can be viewed directly beneath the applicable publication nodes in the **Tree** (left screenshot below) as well as from the **STEP Structure View** palette in InDesign (right screenshot below).



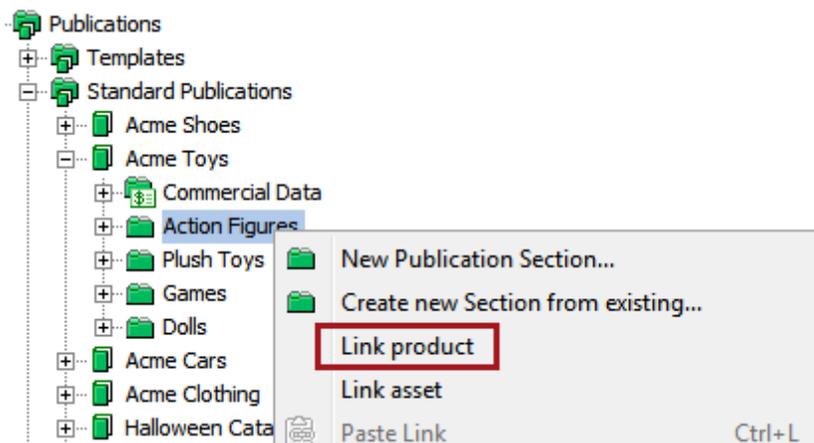
**Note:** Reference types are not used to link products, assets, or classifications to publications. Due to this, any product, asset, or classification object type may be linked to any publication or section object type. In addition, metadata cannot be placed on links between publications / sections and linked objects.

This topic outlines the manual steps involved in linking and unlinking products, assets, and classifications to and from nodes in the publication hierarchy. For information on more automated linking methods, refer to the following:

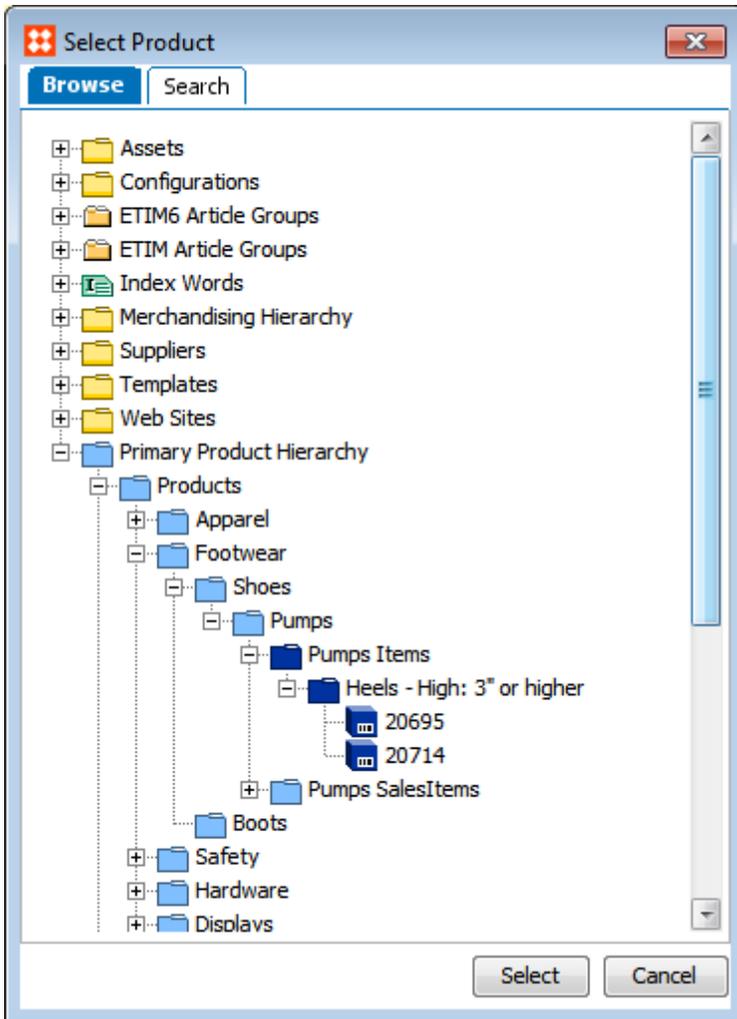
- For more information on linking objects to publications and sections through **STEPXML** imports, see **Managing Objects in AutoPage** in the **AutoPage** documentation. (Though this topic is in the AutoPage documentation, the method is valid for any publication type.)
- For more information on linking objects to publication sections through **Excel** imports, see **Importing Publications in Excel** in the **STEP'n'design** documentation.

## Steps to Link a Product to a Publication or Section

1. In the **Tree**, open the top-level node of the publication hierarchy, then navigate to the publication or section object to which you would like to link your product(s).
2. Click on the relevant publication or section, then right-click and select **Link product**.



3. In the **Select Product** dialog, browse or search for the product(s) that you would like to link to the publication or section. Multiple products may be selected by holding the CTRL or Shift key while clicking.



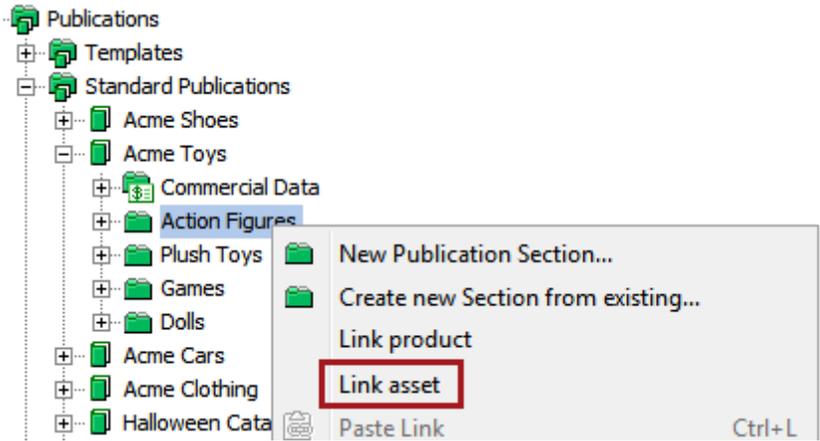
4. Click **Select** to link the selected product(s) to the publication or section.

## Unlink a Product from a Publication or Section

1. In the publication hierarchy, navigate to the product that you would like to unlink from the publication or section.
2. Click the relevant product, then right-click and select **Unlink product**.

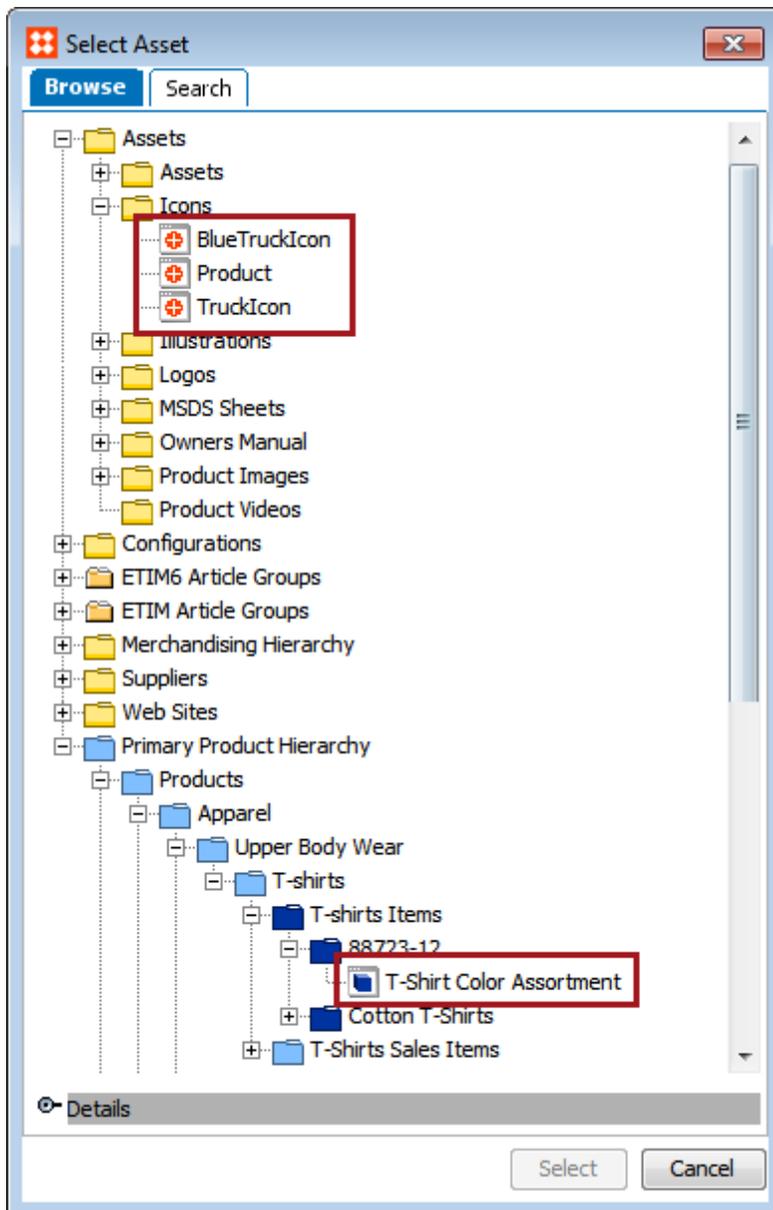
## Link an Asset to a Publication or Section

1. In the Tree, open the top-level node of the publication hierarchy, then navigate to the publication or section object in which you would like to link your asset(s).
2. Click the relevant publication or section, then right-click and select **Link asset**.



3. In the **Select Asset** dialog, browse or search for the asset(s) that you would like to link to the publication or section. Multiple assets may be selected by holding the CTRL or Shift key while clicking.

Assets will typically be selected from a location in the Classification hierarchy but they can also be chosen from the Product hierarchy if they have been linked to the product by an asset reference.



4. Click **Select** to link the selected asset(s) to the publication or section.

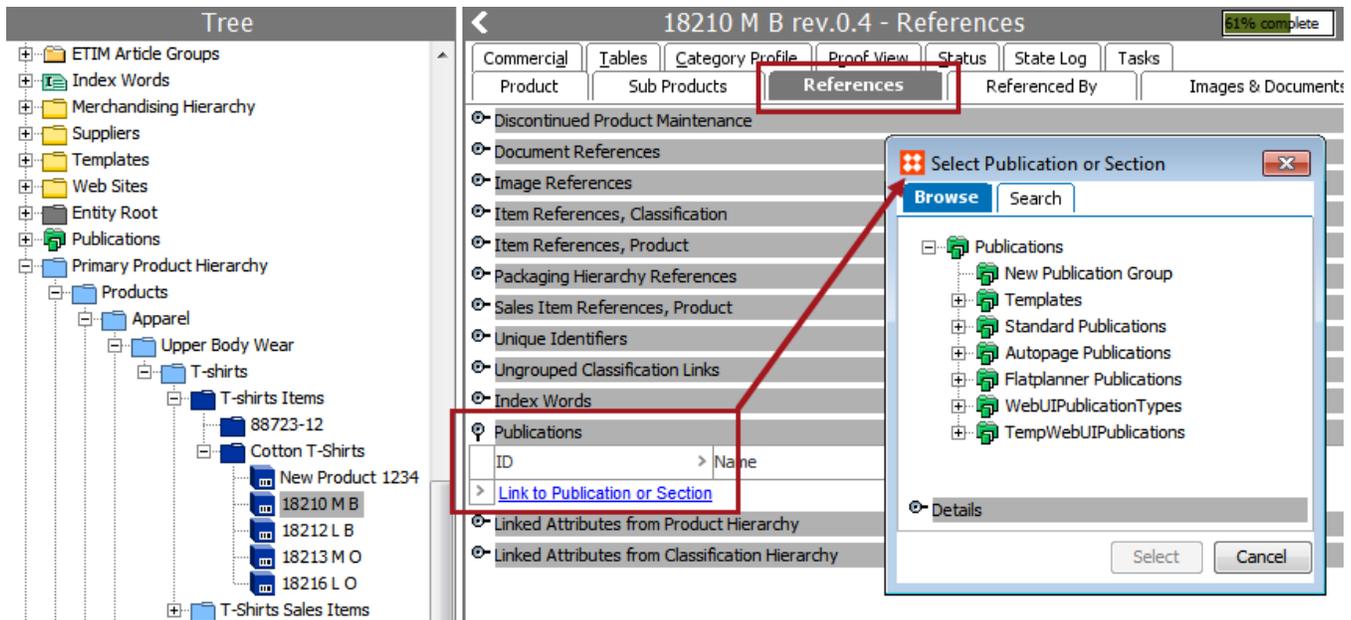
## Unlink an Asset from a Publication or Section

1. In the publication hierarchy, navigate to the publication or section that contains the asset you would like to unlink.
2. Click the relevant asset, then right-click and select **Unlink asset**.

## Link a Product to a Publication or Section from the Product References Tab

Products may also be linked to publications and sections from the product **References** tab. (This option is not available for assets or classifications.)

1. Navigate to the Product object that you would like to link to the publication or section and click on the **References** tab.
2. Expand the **Publications** flipper and click **Link to Publication or Section**.



3. In the **Select Publication or Section** dialog, browse to or search for the publication or section into which you would like to link your product.
4. Click **Select**. The product is now linked to the selected publication / section.

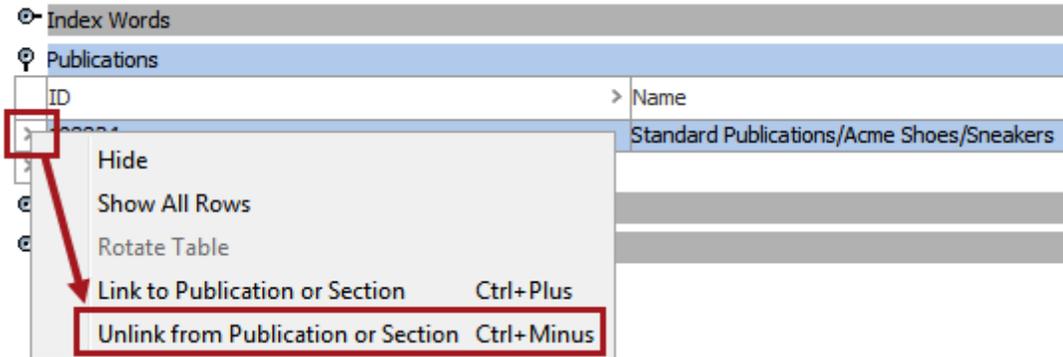
Publications	
ID	Name
> 108824	Standard Publications/Acme Shoes/Sneakers
>	<a href="#">Link to Publication or Section</a>

## Unlink a Product from a Publication or Section from the Product References Tab

1. Navigate to the **References** tab of the Product that you would like to unlink from the publication or section.
2. Expand the **Publications** flipper and click the arrow to the left of the row that contains the publication / section

from which you would like to unlink.

3. Select **Unlink from Publication or Section**.



## Link a Classification to a Publication Section

To link a **Classification** folder to a publication section, simply drag and drop the Classification folder from its location in the Tree into the relevant section folder.

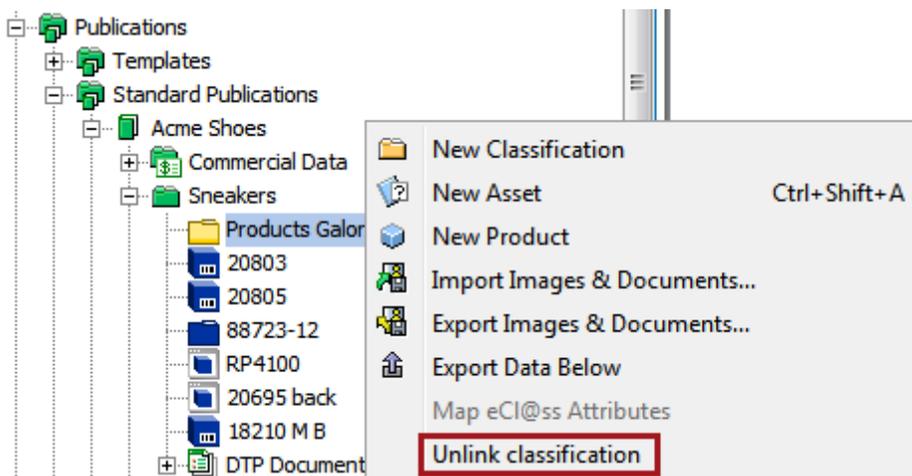
---

**Note:** There is no right-click option available on sections for linking Classifications. Also note that Classifications cannot be linked to publications at the publication level.

---

## Unlink a Classification from a Publication Section

1. In the Publication hierarchy, navigate to the section that contains the Classification you would like to unlink.
2. Click the relevant Classification, then right-click and select **Unlink classification**.



## Considerations and Limitations

Linking Products (and Assets and Classifications, if applicable) to publication sections is mandatory for **AutoPage** publications. In addition, Products, Assets, and Classifications can be linked to sections in AutoPage publications by using the **AutoPage Publication Planner**.

For more information on object linking for AutoPage publications, see the following sections of the **AutoPage** documentation:

- **Overview of the AutoPage Interface**
- **Managing Objects in AutoPage**

## Navigation and Searches

This section describes the many different ways you can access specific data. Whether it be by standard navigation, Bookmarks, basic, advanced or drill-down searches, STEP provides many ways to locate the required data.

This section will allow users to:

- Navigate hierarchies
- Find data quickly using the **Goto** function
- Find data using basic and advanced searches
- Perform drill-down searches using the **Search Result Profiling** page
- Use standard and **Search Bookmarks**

## Basic Navigation

You can navigate the STEP tree structures in the same manner as you navigate Windows folder structures.

### Expanding a Folder

- Click the plus sign (+) to the left of a folder
- or double-click on collapsed folder

### Collapsing a Folder

- Click the minus sign (-) to the left of a folder
- or double-click on expanded folder

---

**Note:** Folders with an (x) sign cannot be expanded in the hierarchy, because they contain too many subnodes. To reach objects beneath such folders, the search or **Goto** functionality must be used.

---

The remaining navigation methods are standard techniques similar to those just described. These basic desktop computer skills are prerequisites for all users of the STEP system.

## Using Goto

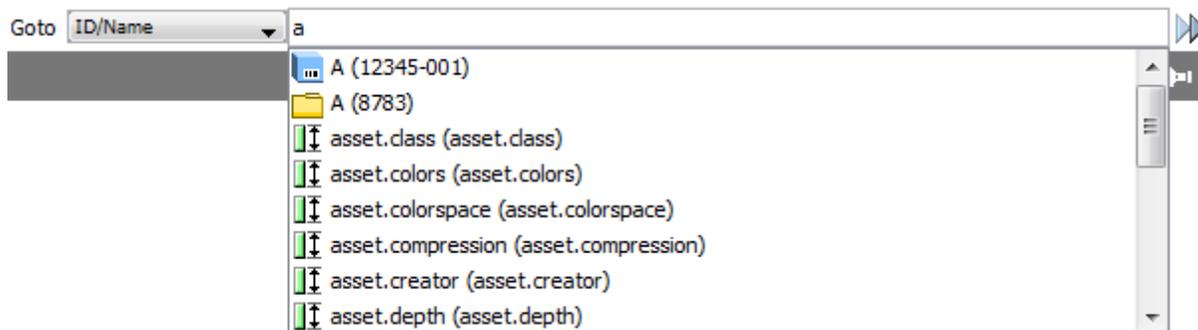
The **Goto** functionality allows you to locate an object in STEP in a quick and efficient manner. You simply type in the **Name** or **ID** of an object in the **Goto** field, press Enter or click the **Goto next object** button to the right of the field, and the system will take you to the object without displaying a list of search results. If there are several matches, the **Goto** function will take you to the first hit it finds and you can then browse through the additional hits using the **Goto next object** button.

---

**Note:** Pressing Ctrl+G will take you to the **Goto** field.

---

Once you start typing in the **Goto** field, the system will suggest objects matching the typed-in text (case insensitive) and display them on a drop-down menu as shown below.



Items can be selected from the menu using either the mouse or the keyboard ARROW UP/DOWN keys. A maximum of 20 items will be displayed.

# Bookmarks

In the STEP system there are two different types of **Bookmarks**, standard navigation **Bookmarks** and **Search Bookmarks**.

---

**Note:** **Bookmarks** are stored on the local STEP system and are not accessible when logging into STEP from a different computer.

---

## Standard Navigation Bookmarks

Standard navigation **Bookmarks** are used for quickly accessing specific nodes in the **Tree** and **System Setup** hierarchies.

You can add a standard navigation **Bookmark** by selecting a node in the hierarchy and clicking **Add Bookmark** in the **Navigate: Bookmarks** menu or alternately by using the Ctrl+D keyboard shortcut. The **Bookmark** will afterwards be accessible in the left side **Bookmarks** tab.

## Search Bookmarks

**Search Bookmarks** are used for storing specific searches that can then easily be re-run.

You can add a **Search Bookmark** by selecting **Add Search Bookmark** in the **Navigate: Bookmarks** menu with the **Search** tab open.

When you click a stored **Search Bookmark**, the search will automatically be run and you will be taken to the **Search** tab.

## Editing a Bookmark

Both standard navigation and **Search Bookmarks** can be edited in the **Bookmarks** tab by right-clicking the **Bookmark** and selecting **Edit Bookmark** in the context menu. It is possible to edit the **Name** of the **Bookmark** and also the object / search URL if the **Edit URL** checkbox is activated.

## Removing a Bookmark

Both standard navigation and **Search Bookmarks** can be removed from the **Bookmarks** tab by right-clicking the **Bookmark** in the tab and selecting **Remove Bookmark** on the context menu.

# Search Overview

The **Search** tab in combination with the **Search Result Profiling** page offers extensive methods for locating objects in STEP quickly and efficiently.

If you know specific details about the object you wish to find, using the **Search** tab you can find, for example, all **Products** where the value for the attribute Weight is less than '5 kg', the object is located below the Product Folder 'Office Chairs' and is not of the **Object Type** 'Item'.

If you do not know the details, you can start with a broad search and then narrow it down using the **Search Result Profiling**.

## Search Elements

The screenshot shows the Search interface with the following elements highlighted by numbered callouts:

- 1: Search input field
- 2: Search button
- 3: Filter dropdown (Object Type = Asset)
- 4: Reset button
- 5: Search button
- 6: Search results list
- 7: Show Details button
- 8: Selected search result
- 9: Search filters
- 10: Search filters
- 11: Search filters

The screenshot shows the Search Result Profiling interface with the following elements:

- 12: Search Result Profiling title
- 127 hit(s)
- Click links to narrow down search
- Notice: Profile is not filtered according to context visibility / privilege check
- Results by Object Type
  - Product (107) - exclude
    - Item (41) - exclude
    - SalesItem (18) - exclude
    - Case (10) - exclude
    - Level2 (7) - exclude
    - Level3 (6) - exclude
    - ItemFolder (6) - exclude
    - SalesItemFolder (6) - exclude
    - Pallet (4) - exclude
    - Level1 (3) - exclude
    - Level4 (2) - exclude
    - SalesItemFamily (2) - exclude
    - ItemFamily (1) - exclude
    - Pack (1) - exclude
  - Classification (20) - exclude
    - Asset Level 2 (7) - exclude
    - Asset Level 1 (4) - exclude
    - Department (3) - exclude
    - MerchandisingClass (3) - exclude
    - SubDepartment (3) - exclude
- Results by Position in Tree Hierarchy
  - Results by Parent (Displaying the 5 most common)
    - Products (29) - exclude
    - Buy Side Packaging (15) - exclude
    - Products (11) - exclude
    - Drinking Items (5) - exclude
    - T-shirts and Sweatshirts (4) - exclude

1. Search Criteria Type Selector - Click the text / triangle icon to display a list of available search criteria options. See **Basic Search Criteria & Functionality** within the **Search Overview** documentation for more information.
2. Add Criteria / Operator Button - Click the button to add a new **Standard Search Criteria**. The type can be changed for each search criteria. If you hold down the mouse button, you can choose an **OR** operator or an **Exclude** operator. See **Basic Search Criteria & Functionality** within the **Search Overview** documentation for more information.
3. Remove Search Criteria Button - Clears the criteria from the search. Click the Search button to refresh the Results Area.
4. Reset Button - Clears all results from the **Search** tab and **Search Result Profiling** page.
5. Search Button - Runs the defined search.
6. Search Result Counts - The number of items currently displayed and total number of items found by the search. If the search finds objects not visible in the current Context or objects that you are not privileged to see, a message is displayed and the objects are not displayed in the search result.
7. Show Details / Hide Details Toggle - Hyperlink shows or hides search result details. The details view displays asset thumbnails.
8. Search Results List - Click an object to open the object editor in the Search Results Profiling pane while continuing to display the Search Results list. A maximum of 100 results are displayed in this area. The complete result set can be viewed, exported or updated using the Operations on Entire Result options.
9. Save as Collection Button - Click to open the **Save as Collection** dialog which allows you save the entire result set as a **Collection**. Collections are available on the Tree tab. See **Search Operations** within the **Search Overview** documentation for more information.
10. Export Button - Click to open the **Export Manager** wizard which allows you to export the entire result set to a specified file type. See **Search Operations** within the **Search Overview** documentation for more information.
11. Bulk Update Button - Click to open the **Bulk Update** wizard which allows you to modify a variety of elements on each item in the entire result set . See **Search Operations** within the **Search Overview** documentation for more information.
12. Search Result Profiling Page - Page displays profiling information about the search including categories and the ability to easily refine the search. See the **Search Result Profiling Page** section within the **Search Overview** documentation for more information.

## The Search Result Profiling Page

The **Search Result Profiling** page appears when you have run your search. The page displays statistics about the search grouped under the headers **Results by Object Type**, **Results by Position in Tree Hierarchy** and **Results by Value**. Apart from giving you information about the results of your search, you can use the page to further refine your search. See the example below:

### Search Result Profiling

87 hits

Click links to narrow down search

#### Results by Object Type

[Product \(78\)](#) - [exclude](#)

 [Product \(78\)](#) - [exclude](#)

[Asset \(8\)](#) - [exclude](#)

 [TIFF Image \(7\)](#) - [exclude](#)

 [JPG Image \(1\)](#) - [exclude](#)

[Attribute \(1\)](#) - [exclude](#)

For all types of searches, the **Search Result Profiling** page will display the results sorted by **Object Type**. The screenshot above shows the **Results by Object Type**. The search result includes 78 **Products** of the **Object Type** "Product", 8 **Assets** (where 7 are of the **Object Type** "TIFF Image" and 1 is of the **Object Type** "JPG Image") and finally 1 **Attribute**.

If you click **TIFF Image**, an **Object Type Search Criteria** is added to the search. The search runs again, finding only objects with the **Object Type** "TIFF Image".

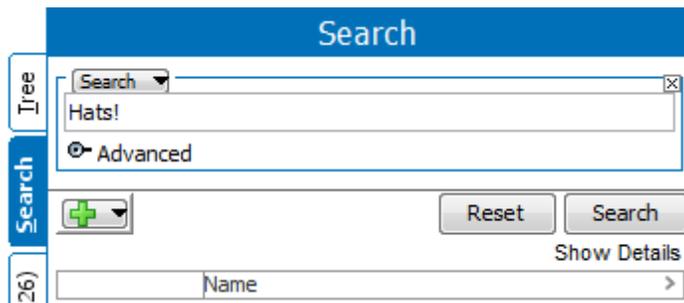
If you click **exclude** next to **TIFF Image**, an **Object Type Search Criteria** is added to the search, but this time as an **Exclude Criteria**. Hence, all objects of the **Object Type** "TIFF Image" will be excluded from the search result.

## Basic Search Criteria and Functionality

This section describes the different types of search criteria available in the STEP system as well as some basic search functions.

### The Standard Search Criteria

The standard search criteria named 'Search' allows you to find objects in STEP based on **Name**, **ID** and **Attribute** values.



If you simply enter a text string and click the **Search** button, the search will find objects with an **ID**, and / or a **Name** and / or an **Attribute** value matching the entered string. Below you can see how you can further refine your standard searches.

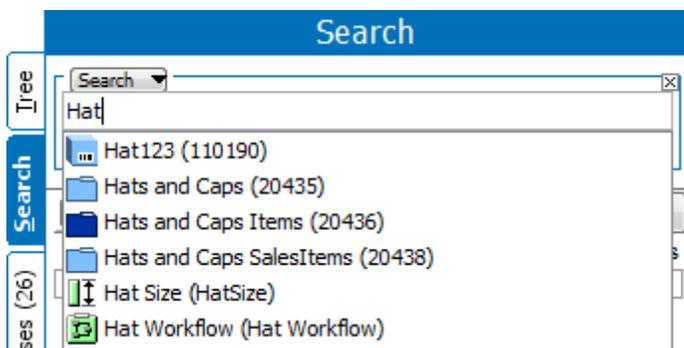
---

**Note:** By default, standard searches are case insensitive for **Name** and **Attribute** value searches and case sensitive for **ID** searches. You can make **Name** and **Attribute** value searches case sensitive using the **Advanced** option "Match Case on Names and Values".

---

### Search Field Typeahead

Once you start typing in the standard search criteria text field, the system will suggest possible entries matching the typed in text (case insensitive) and display them on a drop-down menu as shown below.



In the typeahead menu, objects are displayed with their relevant icon, then **Name** and **ID** in brackets, whereas **Attribute** values are shown as text.

Items can be selected from the menu using either the mouse or the keyboard ARROW UP/DOWN keys. A maximum of 100 items will be displayed.

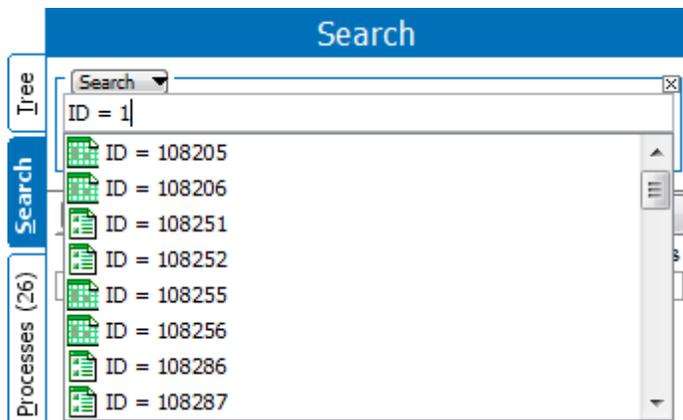
---

**Note:** Using system properties it is possible for a system administrator to control the behavior of the typeahead. E.g. after how many entered characters should suggestions be shown etc.

---

## Limiting Result to Matches on ID's

You can limit standard searches to match on **ID** only by entering "ID = " at the beginning of the text field as shown below.



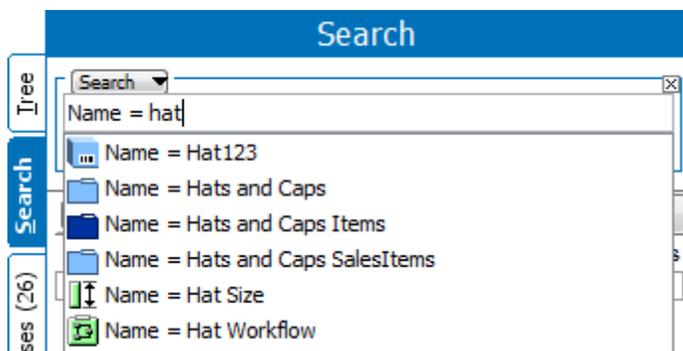

---

**Note:** "id" and "Id" will work as well and spaces on each side of the equals sign are optional.

---

## Limiting Results to Matches on Name

You can limit standard searches to match only on **Name** by entering "Name = " at the beginning of the text field as shown below.




---

**Note:** E.g. "name" and "NAME" will work as well and spaces on each side of the equals sign are optional.

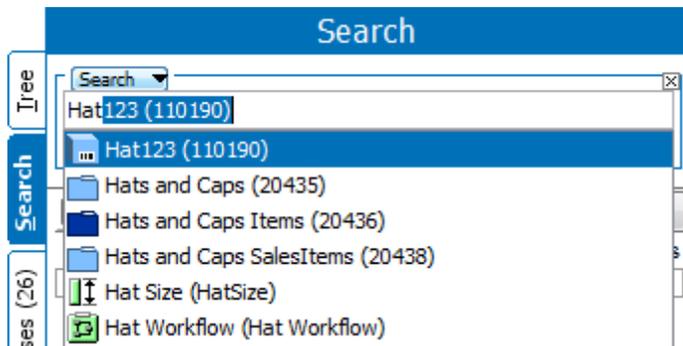
---

## Attribute Value Searches

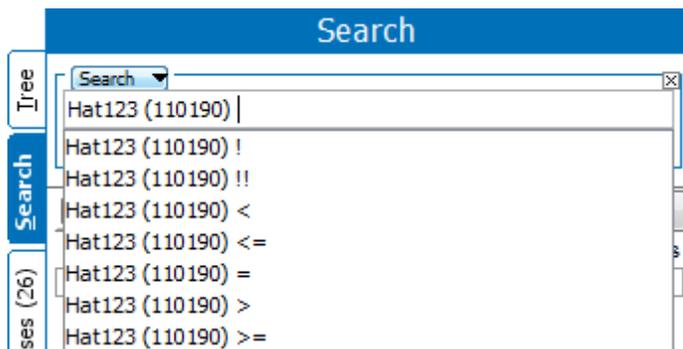
Using a standard search, you can limit the result to only match on values for specific **Attributes**.

There are at least three ways to construct an **Attribute** search query:

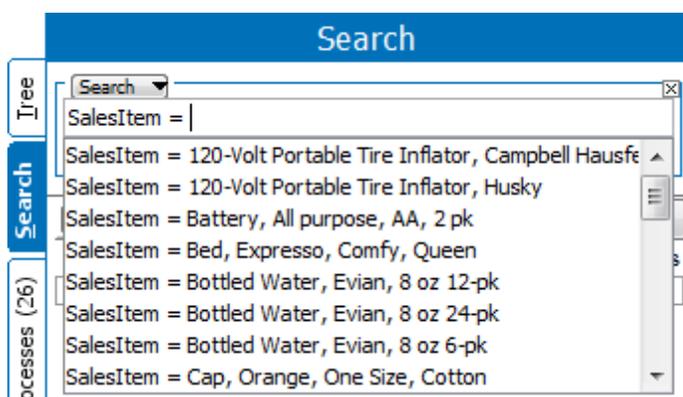
1. Start entering an Attribute **Name** or **ID**, then select the relevant Attribute from the typeahead menu, after which "Attribute Name (Attribute ID)" is inserted in the text field, then enter a search operator or enter a SPACE and select an operator from the typeahead menu and enter the value to search for.



2. Enter the Attribute **ID** (case sensitive), enter a search operator or enter a SPACE and select an operator from the typeahead menu, then enter the value to search for.



3. Enter the Attribute **Name** (case insensitive), enter a search operator or enter a SPACE and select an operator from the typeahead menu, then enter the value to search for.



**Note:** As shown on the screenshot above, if you have the required privileges you will get typeahead suggestions on existing values after having specified a search operator.

## Attribute Value Search Operators

There are 7 operators that can be used when performing **Attribute** value and **Reference Metadata Attribute** value searches.

**<** - Less than operator. Only works for number validated **Attributes** (Validation Base Type = number, integer or fraction)

**<=** - Less than or equal to operator. Only works for number validated **Attributes** (Validation Base Type = number, integer or fraction)

**=** - Equal to operator.

**>** - Greater than operator. Only works for number validated **Attributes** (Validation Base Type = number, integer or fraction)

**>=** - Greater than or equal to operator. Only works for number validated **Attributes** (Validation Base Type = number, integer or fraction)

**!** - Operator used for finding objects where the specified **Attribute** does not have values in current **Context**. Note that the search does not check whether the **Attribute** is valid for a given object. Also, if the specified attribute has an inherited value (not a local value), then the object will be listed in the results set even though the value field is not empty.

**!!** - Operator used for finding objects where the specified **Attribute** does not have local values in any **Context**. Note that the search does not check whether the **Attribute** is valid for a given object. Also, if the specified attribute has an inherited value (not a local value), then the object will be listed in the results set even though the value field is not empty.

## Using Wildcards in Searches

In searches you can use two different wildcards for performing searches on partial text strings. The wildcards are asterisk (\*) and question mark (?).

The difference between the two is that while the asterisk (\*) represents any number of characters in a string, the question mark represents exactly one character.

## Searches in Full Text Indexed Attribute Values

Searches in values for Attributes configured as Full Text Indexable do not work in the same manner as searches in ordinary Attribute values. If you, for instance, have a full text indexed Attribute "Description" with the following value on a given Product:

"Black powder coated diecast aluminum enclosure. Textured surface. Bulk version: Enclosures possibly may have flaws in the finish such as scratches, dents, discoloration, etc."

Then apart from common English words like "in" and "as", each word will be indexed as a separate entity.

This means that a search for: "Description = aluminum" returns the **Product**. On the contrary, if the **Attribute** is not configured as **Full Text Indexable**, for the search to find the product you would have to place wildcards on both sides of the "aluminium" text like this: "Description = \*aluminum\*."

**Note:** Searches starting with a wildcard as shown above will be significantly slower than other searches.

**Note:** For more information about which words are not indexed see the "English Default Stoplist" on Oracle's homepage.

**Note:** As a default, if you have not specified an **Attribute**, typeahead for full text indexed Attribute value entries is turned off. If you have specified an **Attribute**, you will first get typeahead suggestions after having entered 3 characters of the value entry.

## Combining Search Criteria

You can combine different search criteria to create advanced searches. Except for cases where one or more **OR operators** are used, the sequence of the criteria does not matter.

Thus, the search shown below:

The screenshot shows a search interface with the following elements:

- Search:** Search: Name = Hat123
- Tree:** Search Below = Apparel
- Search:** Object Type = Product
- Buttons:** Reset, Search
- Results:** Displaying 1 of 1 results. Show Details. Name: Hat123 ID = 110190

...will generate the same results as:

The screenshot shows a search interface with the following elements:

- Tree:** Search Below = Apparel
- Search:** Object Type = Product
- Search:** Search: Name = Hat123
- Buttons:** Reset, Search
- Results:** Displaying 1 of 1 results. Show Details. Name: Hat123 ID = 110190

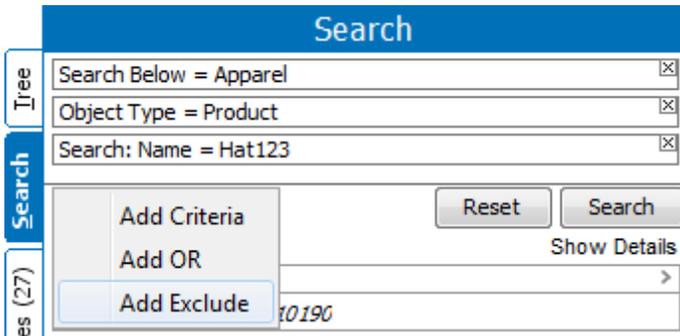
When not using **OR Operators** or **Exclude Search Criteria** in the search, all criteria will be combined with an implicit AND operator.

As for how to construct your search using **Exclude Search Criteria** and **OR Operators**, please see below.

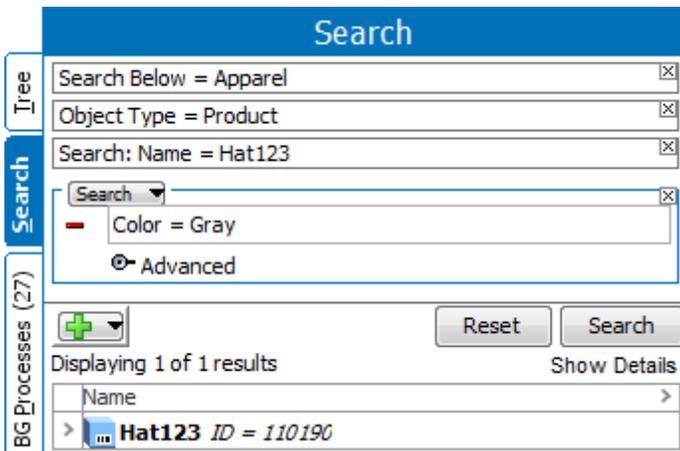
## Using Exclude Search Criteria

It is possible to negate all the different types of search criteria using the **Exclude Search Criteria** functionality.

You can add **Exclude Search Criteria** to your search either by clicking the **Add Criteria/Operator** button, holding the mouse button down and selecting **Add Exclude** from the menu, or by clicking an "exclude" link on the **Search Result Profiling** page.



Exclude Search Criteria appear with a red minus icon on the left side of the criteria panel as shown below.



As long as no **OR Operators** are used, it does not matter where in the sequence of criteria **Exclude Search Criteria** are placed.

Taking the example depicted above, the search will find objects where all the "positive" criteria are met minus objects where the **Attribute** "Color" is "Gray".

---

**Note:** You can use as many **Exclude Search Criteria** in your search as you wish to.

---

**Note:** As the **Exclude Criteria** are subtracted from the "positive" search result, a search containing only an **Exclude Search Criteria** without an Include criteria as point of departure will not generate any results.

---

## Using the OR Operator

You can add an **OR Operator** to your search by clicking the **Add Criteria/Operator** button, holding the mouse button down and selecting **Add Or** from the menu.

When using **OR Operators** your search will be divided in to completely separate parts containing one or more criteria. Each part is in effect executed separately and the results then added before presenting the final result.

As an example, the search shown below will return all objects where the **Name** starts with the text "Hat123" and the **Color** is "Black" plus all objects where the **Name** starts with the text "Hat123" and the **Color** is "Gray".

### Search

**Tree**

Search: Name = Hat123

Search: Color = Black

OR

**Search**

Search: Name = Hat123

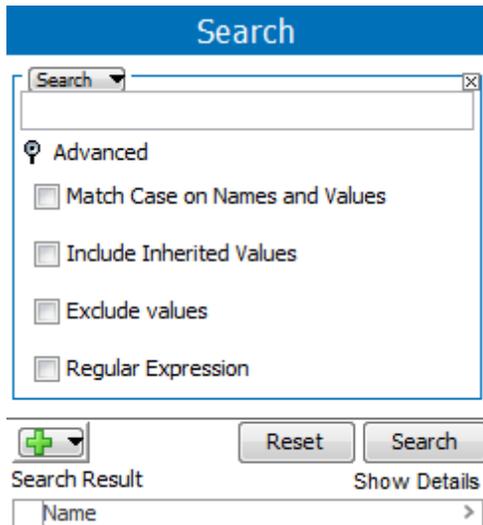
Search

Color = Gray

Advanced

## Advanced Options

Additional options for narrowing a search can be accessed under the **Advanced** flipper in Simple Search.



The screenshot shows a search interface with a blue header labeled "Search". Below the header is a search input field with a dropdown arrow and a close button. A flipper labeled "Advanced" is open, revealing several options: "Match Case on Names and Values", "Include Inherited Values", "Exclude values", and "Regular Expression", each with an unchecked checkbox. Below the flipper are buttons for "Reset" and "Search". At the bottom, there is a "Search Result" section with a "Show Details" button and a text input field containing the word "Name".

### Advanced Search Options

1. Match Case on names and Values - When selected, **Name** and **Attribute** value searches are case sensitive.

---

**Note:** ID searches are always case sensitive.

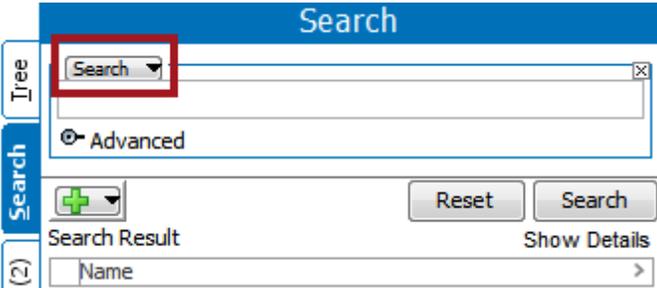
---

2. Include Inherited Values - When selected, attribute value search results will show objects where the match includes inherited values as well as objects where the match includes locally defined values.
3. Exclude Values - When selected, attribute values are not searched for the entered search term. If unchecked, attribute values are searched for the entered term and objects with the search term populated as an attribute value are included in the search results.
4. Regular Expression - Search using regular expressions

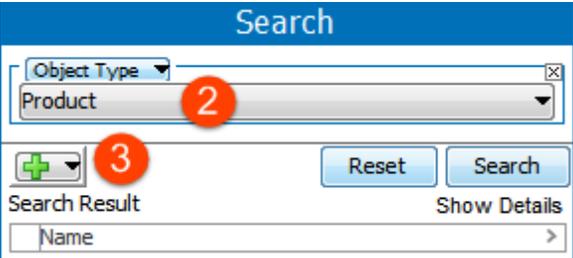
# Object Type

With the **Object Type** search criteria you can limit your search result to items of a specific **Object Type**. These objects are maintained through the STEP Workbench, on the System Setup tab, and under the Object Types & Structures folder. Simply start typing in the field or drill down through the hierarchy to make a node selection.

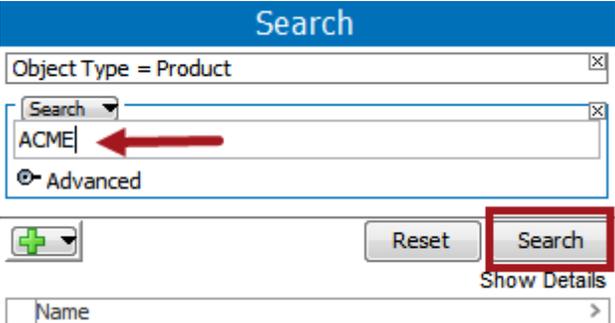
- 1. Navigate to the **Search** tab and click on it. You will see a small dropdown bar that defaults to **Search**. Click on the dropdown bar and select **Object Type**.



- 2. A new dropdown bar will appear with a number of options to select from (options will vary depending on client search needs). For the purpose of this example, **Products** will be used for the search.



- 3. With the search field established, click on the green + symbol to define what product is to be searched.
- 4. You will notice that a new search field appears and the words **Object Type = Product** remain at the top as part of the search criteria. Type in the criteria that you wish to be searched, and click the **Search** button on the lower right hand side. (For this case, it is all products that are made by ACME).



5. Results are listed on the left side, and on the right side a Search Result Profile will populate.

### Search

Object Type = Product

Search  
ACME

Advanced

Reset Search

Displaying 6 of 6 results Show Details

Name
> <b>21933</b> ID = 21933
> <b>27244</b> ID = 27244
> <b>Comfy Bed</b> ID = 22155
> <b>Comfy Footboard</b> ID = 22168
> <b>Comfy Headboard</b> ID = 22167
> <b>Comfy Side Rail</b> ID = 22165

### Search Result Profiling

6 hit(s)  
Click links to narrow down search

### Results by Object Type

[Product \(6\)](#) - [exclude](#)

[Item \(6\)](#) - [exclude](#)

### Results by Position in Tree Hierarchy

#### Results by Parent

- [Beds Items \(4\)](#) - [exclude](#)
- [Products \(1\)](#) - [exclude](#)
- [Refrigeration Items \(1\)](#) - [exclude](#)
- [Products \(1\)](#) - [exclude](#)
- [Drinking Items \(1\)](#) - [exclude](#)

### Results by Value

#### Values matching "ACME"

(Values are displayed in lowercase)

[acme \(7\)](#) - [exclude](#)

#### Attributes with values matching "ACME"

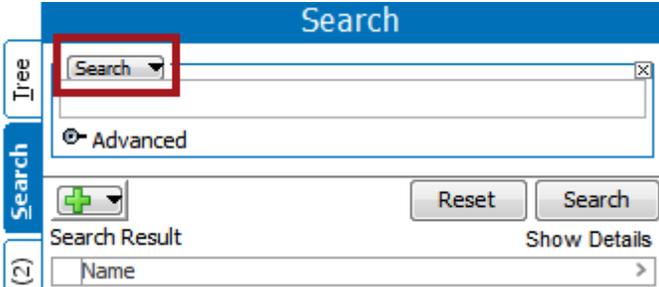
- [Brand Name \(5\)](#) - [exclude](#)
- [Manufacturer Name \(1\)](#) - [exclude](#)
- [Supplier Name \(1\)](#) - [exclude](#)

If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

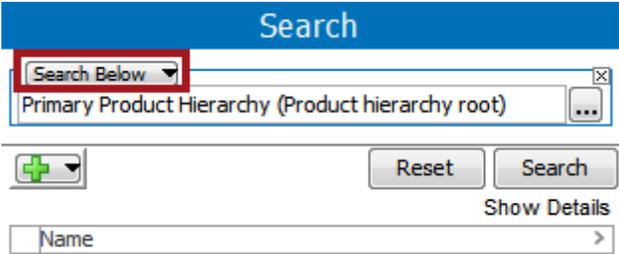
# Search Below

The **Search Below** Search Criteria allows you to limit your search result to objects below a specified node in the **Tree** tab hierarchy.

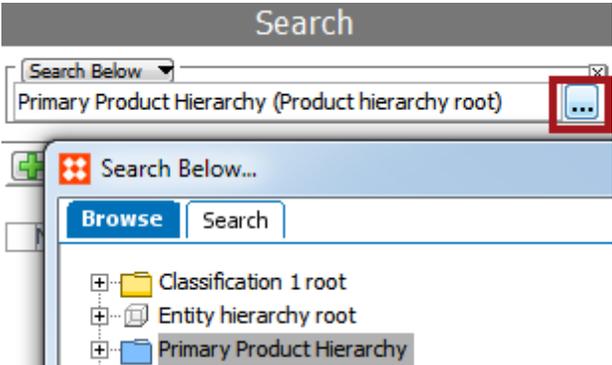
- 1. Navigate to the **Search** tab and click on it. You will see a small dropdown bar that defaults to **Search**.



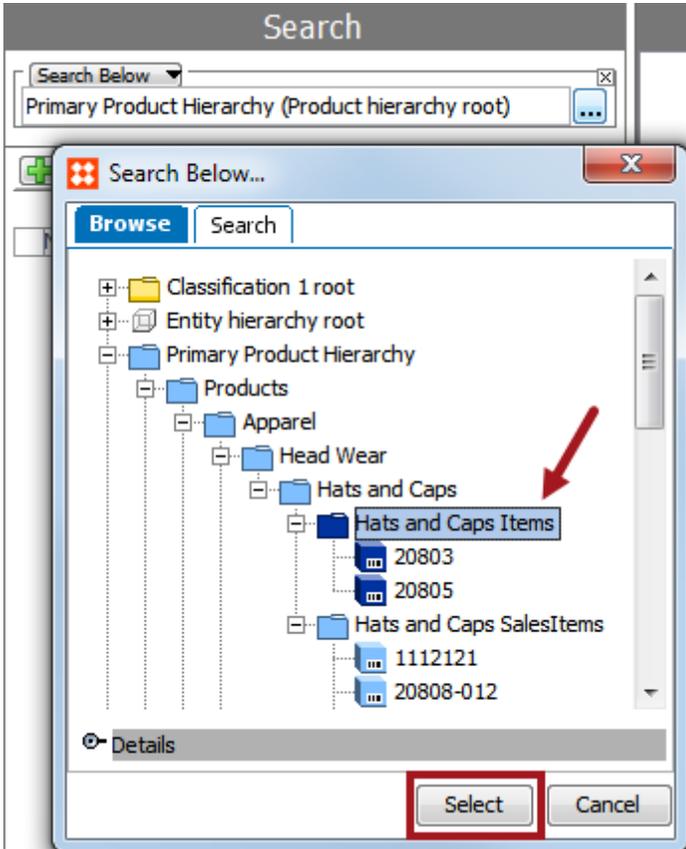
- 2. In the **Search Criteria Type Selector** select **Search Below**.



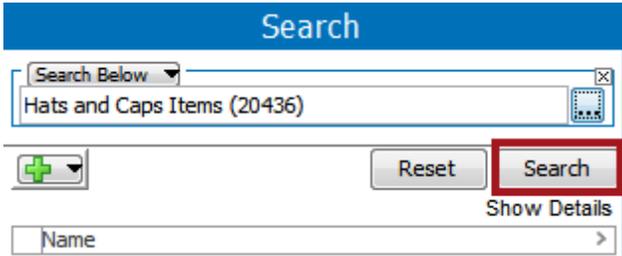
- 3. Click the ... button (ellipsis) to display the **Object Selector Dialog**.



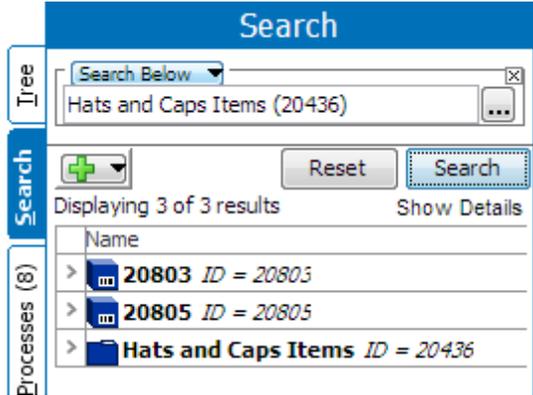
- 4. Select a node in the hierarchy and click the **Select** button.



5. Click the **Search** button



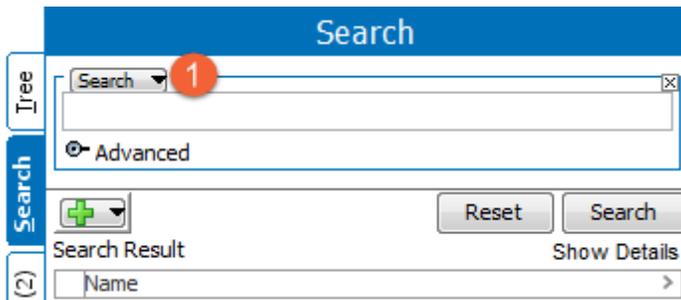
6. The Results displayed includes only items at or below the selected node.



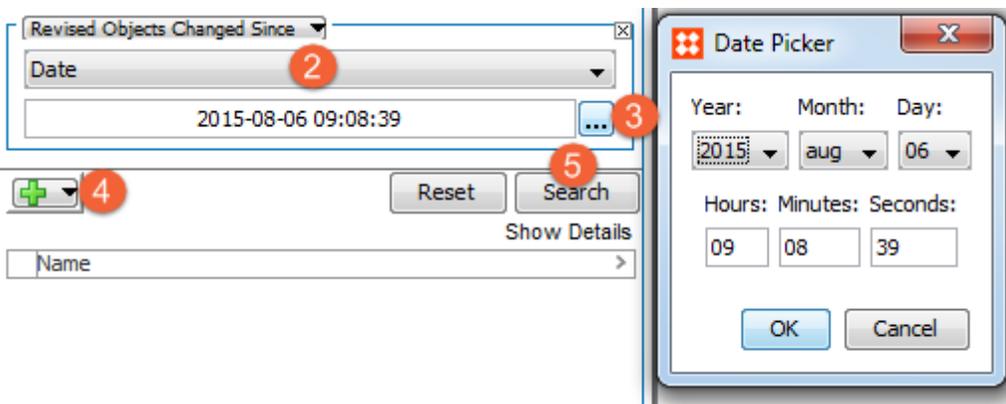
## Revised Objects Changed Since

With the **Revised Objects Changed Since** search criteria you can find recently edited objects in the STEP workbench. To narrow your search, enter an exact date/time to determine how old the changes can be, or you can simply use intervals of days, hours, or minutes.

1. Navigate to the side **Search** tab and click on it. A small dropdown bar will appear. Click on the dropdown bar and select **Revised Objects Changed Since**.



2. A new dropdown bar will appear with a number of options to select from: 'Date', 'Interval of Days', 'Interval of Hours' and 'Intervals of Minutes'. For the purpose of this example, 'Date' will be used for the STEP Workflow search field.



3. Click on the [...] and determine the date / time of the oldest objects you wish to search. Click **OK**.
4. Click the green plus sign to add additional search criteria. (Optional)
5. Click on **Search** to run the search and view results.

Revised Objects Changed Since

Date

2015-08-05 09:08:39

+

Reset Search

Displaying 8 of 8 results Show Details

Name
> <b>BuySideSellSide_Internal</b> ID = BuySideSellSide_Intern
> <b>Gloveworks case (Bx of 5 pair orange)</b> ID = 21875
> <b>SKU 00001</b> ID = SKU 00001
> <b>SKU 00011</b> ID = SKU 00011
> <b>Test11189</b> ID = 100703
> <b>Test doc1</b> ID = 107275
> <b>Test doc1</b> ID = 107272
> <b>Test document</b> ID = 107257

### Search Result Profiling

8 hit(s)  
Click links to narrow down search

### Results by Object Type

- [Product \(4\)](#) - [exclude](#)
- [Product \(2\)](#) - [exclude](#)
- [Item \(1\)](#) - [exclude](#)
- [Case \(1\)](#) - [exclude](#)

- [Asset \(3\)](#) - [exclude](#)
- [Owners Manual \(2\)](#) - [exclude](#)
- [Assets \(1\)](#) - [exclude](#)

### Special types (1)

- [Portal Configuration Type \(1\)](#) - [exclude](#)

### Results by Position in Tree Hierarchy

Results by Parent  
(Displaying the 5 most common)

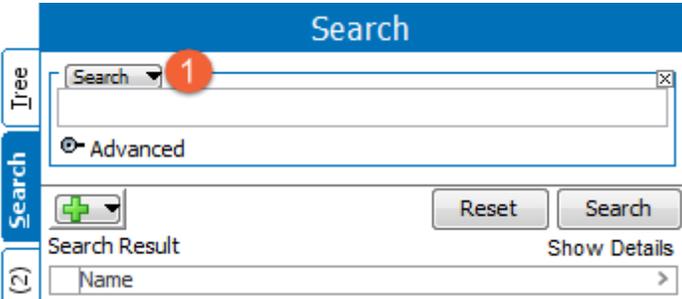
- [MA \(3\)](#) - [exclude](#)
- [Products \(1\)](#) - [exclude](#)
- [Ski Jacket Pro \(1\)](#) - [exclude](#)
- [Ski Jacket Light \(1\)](#) - [exclude](#)
- [Buy Side Packaging \(1\)](#) - [exclude](#)

If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

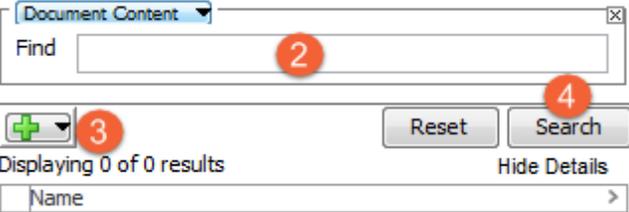
# Document Content

With the **Document Content** search criteria you can search for a specified word / text string in text documents stored as Assets in STEP.

- 1. Navigate to the side **Search** tab and click on it. A small drop down bar will appear. Click on the drop down bar and select **Document Content**.



- 2. Enter the word / text string into the text field that appears.

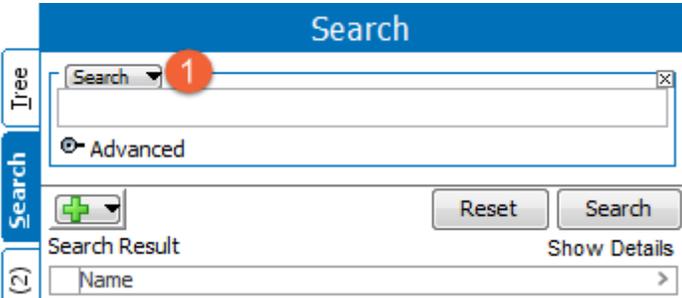


- 3. Click the green plus sign to add additional search criteria. (Optional)
- 4. Click on 'Search' to run the search and view results.

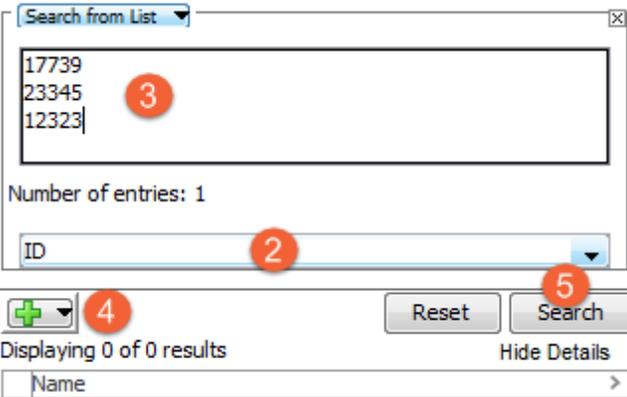
# Search from List

With the **Search from List** search criteria you can search using a list of data. This data can be manually entered into the user field or pasted in from another source, such as an Excel spreadsheet or Smartsheet. Users may specify whether the entered data should be used to search for object IDs, Names, Key values, Attributes values (with specification of the particular attribute), or other criteria determined by client's needs. This makes **Search from List** an efficient and easy way to find large numbers of objects in STEP and, in combination with other available search plugins, suitable for highly complex and extensive searches.

1. Navigate to the side **Search** tab and click on it. A small dropdown bar will appear. Click on the dropdown bar and select **Search from List**.



2. A data field and dropdown bar will appear with a number of options to select from (options will vary depending on client search needs). For the purpose of this example, 'ID' will be used for the search.



3. Enter the data list you wish to search. Copied data can come from Excel or any other application as long as line breaks or tabs are included to separate the values. Alternatively, data can be entered manually, using **Enter** to create a line break between each value.

**Note:** The separators used for data are tabs and line breaks. To copy data in, each value must be listed on its own line or separated by a tab delimiter, without any characters around it, including bullet indicators and spaces.

- 4. Click the green plus sign to add additional search criteria. (Optional)
- 5. Click on 'Search' to run the search and view results.

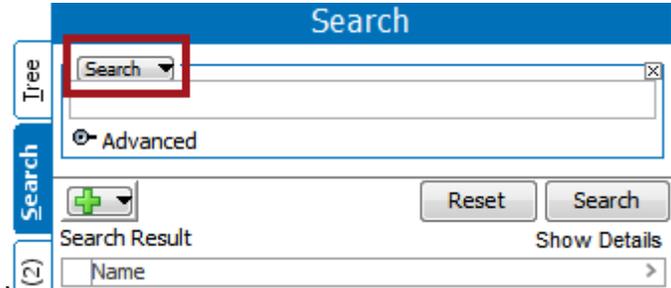
The screenshot displays two side-by-side panels. The left panel, titled 'Search', features a search box with a dropdown menu set to 'Search from List'. Below the search box, a list of three entries is shown: 17739, 20808, and 101567. The text 'Number of entries: 3' is displayed below the list. A dropdown menu for 'ID' is visible. At the bottom of the search panel, there is a green plus sign icon, a 'Reset' button, and a 'Search' button. The right panel, titled 'Search Result Profiling', shows the results of the search. It indicates '4 hit(s)' and provides a link to narrow down the search. The results are categorized into three sections: 'Results by Object Type', 'Results by Position in Tree Hierarchy', and 'Results by Parent'. The 'Results by Object Type' section lists 'Product (3)', 'SalesItem (3)', and 'Classification (1)'. The 'Results by Position in Tree Hierarchy' section lists 'Asset Level 2 (1)'. The 'Results by Parent' section lists 'Hats and Caps SalesItems (3)' and '5 (1)'. Each item in the results is accompanied by a small icon and a link to 'exclude' it.

If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

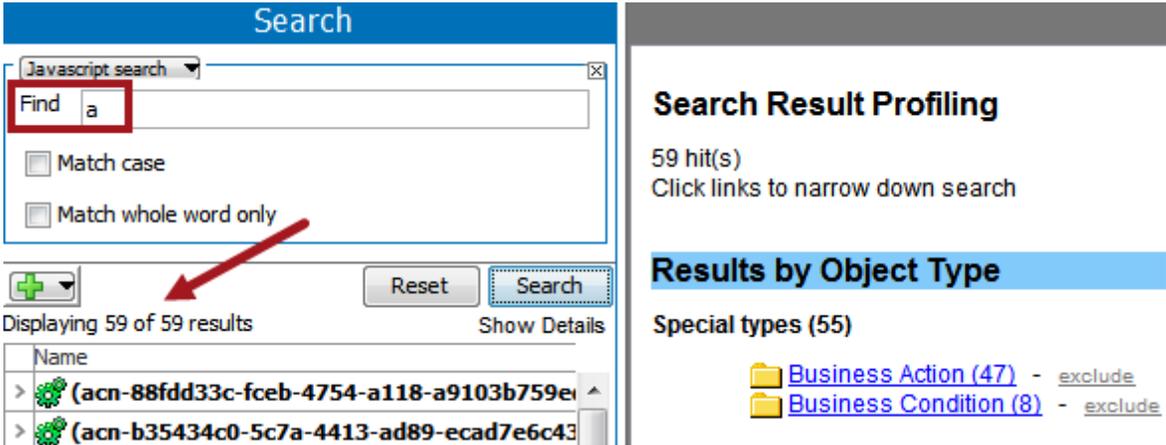
# JavaScript

The **JavaScript** search criteria searches through all JavaScript in STEP. It can match items according to Business Rules, Match Algorithms, Decision Tables or any other structure programmed through JavaScript.

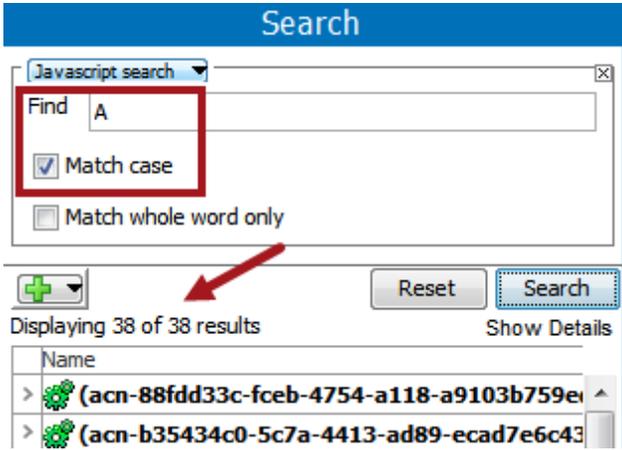
To set a criteria as a **JavaScript** search, first click on the side search tab. You will see a small drop down bar that defaults to Search. Click on the drop down bar and select **JavaScript**.



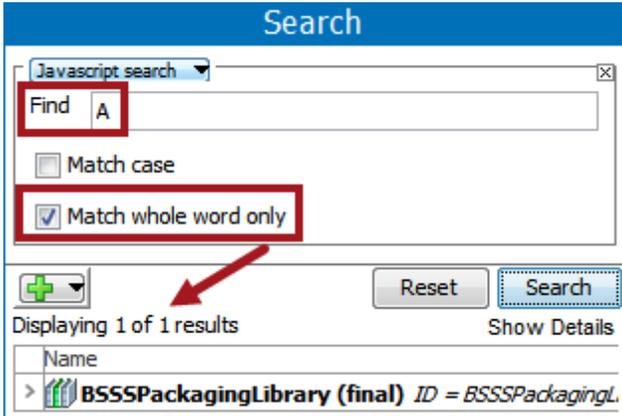
By running a basic search, it will return results in all categories for the desired JavaScript part.



If you press **Match Case**, the search will only return results that match the upper or lower case letters that are in the search criteria.



If **Match whole word only** is checked, it will return only results that are the exact criteria that were put in that stand alone. An example would be if the letter 'a' were typed into a search, and only results that had 'a' in it that stand alone somewhere in the JavaScript were returned.



## Missing Mandatory Values

The Missing Mandatory Values search criteria is used for finding Product objects that have valid **Mandatory Specification** attributes without values.

To set a criteria as a **Missing Mandatory Values** search, first click on the side Search tab. You will see a small dropdown bar that defaults to Search. Click on the dropdown bar and select **Missing Mandatory Values**.

The screenshot shows the 'Search' interface. At the top is a blue header with the word 'Search'. Below it is a search bar with a dropdown menu currently set to 'Search', which is highlighted with a red box. To the left of the search bar is a vertical sidebar with 'Tree' and 'Search' tabs. Below the search bar is an 'Advanced' search toggle. At the bottom of the search bar are 'Reset' and 'Search' buttons. Below the search bar is a 'Search Result' section with a 'Show Details' link and a search result field containing the text 'Name'.

The search criteria requires no data input or selections to be made. However, it is encouraged to use in conjunction with another search criteria (by pressing the green + sign) to help further refine the search.

The screenshot shows the 'Search' interface with the dropdown menu set to 'Missing Mandatory Values'. A red arrow points to the green plus sign button, indicating that it should be used to combine search criteria. The search bar now displays 'Missing Mandatory Values'. The 'Reset' and 'Search' buttons are still present. The 'Search Result' section shows 'Name'.

---

**Note:** As the **Missing Mandatory Values** search criteria only works on Product objects, using it in combination with other search criteria will limit the search result to such objects.

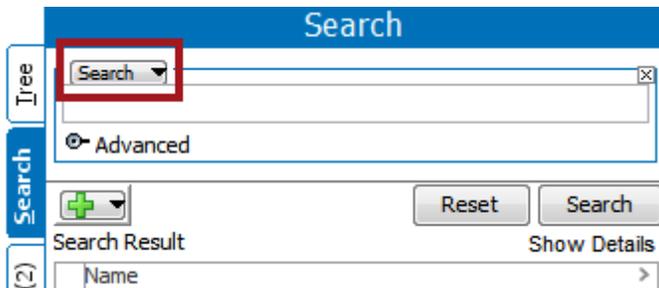
---

The Missing Mandatory Values search criteria can also be set to exclude Product objects with missing **Mandatory** values. This functionality is described in **Using Exclude Search Criteria** within the **Basic Search Criteria** documentation.

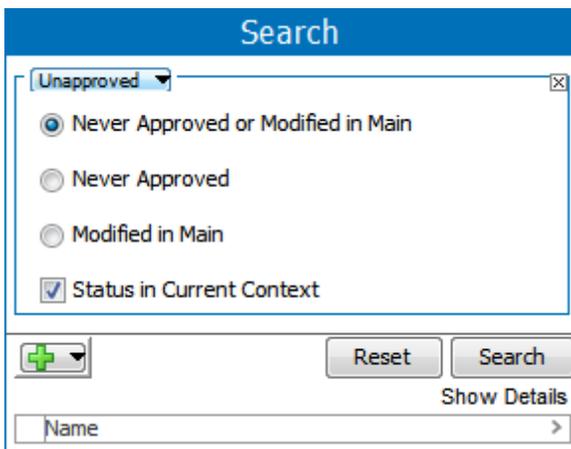
# Unapproved

This criteria is used to identify objects that are not currently approved. These include classifications, objects, images and documents, and entities setup to be Workspace revisable.

To set a criteria as an **Unapproved** search, first click on the side Search tab. You will see a small dropdown bar that defaults to Search. Click on the dropdown bar and select **Unapproved**.



Once you select this, there are three options to use: 'Never approved or modified in main,' 'Never approved,' or 'Modified in Main.'



**Never Approved or Modified in Main:** This means that when it was uploaded, no criteria on the item has been touch or changed ever in the approved or maintenance states.

**Never Approved:** This means that the item was never certified (or approved).

**Modified in Maintenance:** The object was modified or added to in the maintenance setting.

**Status in Current Context:** When this box is checked, it will only search in STEP under what is selected in the Context box.

Context English US

### Search

Unapproved

- Never Approved or Modified in Main
- Never Approved
- Modified in Main
- Status in Current Context

Reset Search

Show Details

+

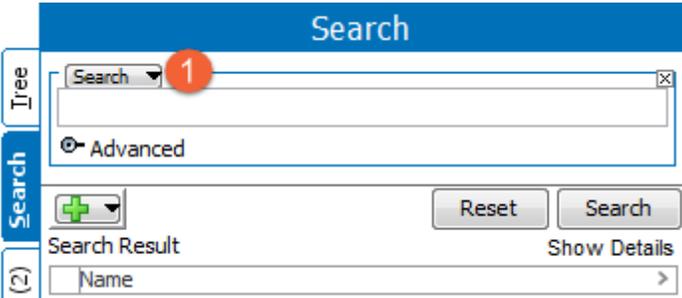
Name >

Tree  
Search  
BG Processes (2)

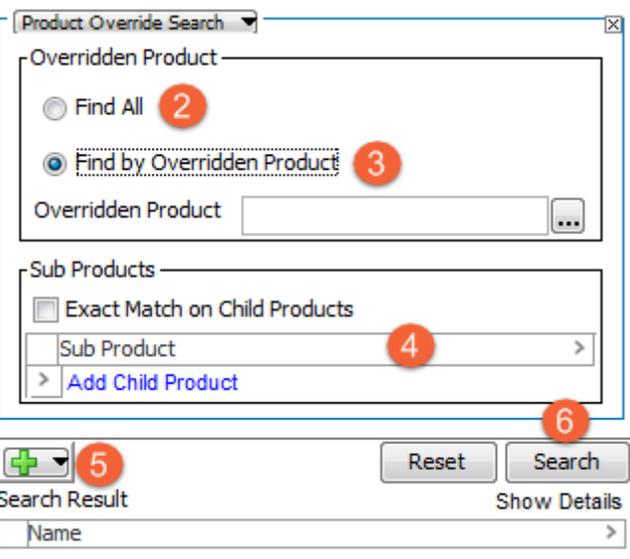
# Product Override

With the **Product Override** search criteria you can locate and identify any product overrides present in your system. You can simply search for all overrides in STEP or you can narrow your search to overrides of a specific product. If more concise results are required, you can even specify sub-products.

- 1. Navigate to the side **Search** tab and click on it. A small dropdown bar will appear. Click on the dropdown bar and select **Product Override**.



- 2. Two options will appear: 'Find All' and 'Find by Overridden Product'. 'Find All' will search for all product overrides in your system. For the purposes of this example, 'Find by Overridden Product' will be used for the search.



- 3. Select the 'Find by Overridden Product' option and either type in the product's name you wish to search or click the [...] to browse for a product to search.

- 4. Clicking 'Add Child Product' and selecting sub products will narrow the search further, requiring search results to have those specific sub-products linked to them. Checking the 'Exact Match on Child Products' box will require search results to have every sub-product you have specified—nothing more, nothing less.
- 5. Click the green plus sign to add additional search criteria. (Optional)
- 6. Click on **Search** to run the search and view results.

Product Override Search

Overridden Product

Find All

Find by Overridden Product

Overridden Product: Ski Jacket Pro (Ski Jacket Pro) ...

Sub Products

Exact Match on Child Products

Sub Product
> 104096 → SKU 00003
> SKU 00001
> SKU 00002
> Add Child Product

+ [ ] Reset Search

Displaying 1 of 1 results Show Details

Name
> <b>104061 → Ski Jacket Pro ID = 104061</b>

**Search Result Profiling**

1 hit(s)  
Click links to narrow down search

**Results by Object Type**

- [Product \(1\)](#) - [exclude](#)
- [Product-override \(1\)](#) - [exclude](#)

**Results by Position in Tree Hierarchy**

- Results by Parent
- [Level 2 \(1\)](#) - [exclude](#)

If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

## References and Referenced By

The **References** and **Referenced By** criteria work similarly.

To navigate to either of these searches, go to the side Search tab and click on it. You will see a small dropdown bar that defaults to **Search**. Click on the drop down bar and select **References** or **Referenced By**.

The screenshot shows the 'Search' interface. At the top, there is a blue header with the word 'Search'. Below it, a search bar contains a dropdown menu with 'Search' selected, which is highlighted by a red rectangle. To the left of the search bar is a vertical sidebar with 'Tree' and 'Search' tabs. Below the search bar, there is a 'Search Result' section with a 'Show Details' link. The search bar also has a 'Reset' button and a 'Search' button.

Both options require a reference type selection to begin. Reference types are setup in the STEP Workbench System Setup tab in the Reference Types folder, and the Web UI Advanced Search allows you to pick from image and document reference types, classification reference types, and product reference types.

Once a reference type is entered, no additional options need to be filled in to start a search. Use the information at a high level or fill in the other values to drill down further (e.g., multi-supplier item references). Select a reference source under **Referenced By** and a target under the **References**. Plus enter specific attributes and values to search reference metadata.

### References

For References, there are two boxes that can be checked: **Include Inherited References** and **Finding Missing References**.

**Include Inherited References:** When this is selected, it will show items that have the particular search criteria passed down to them from a parent folder or level.

**Search**

References

Reference Type  ...

**Include Inherited References**

Find Missing References

Reference Target

...

Advanced

Displaying 4 of 4 results Show Details

Name
> <b>20-68204</b> ID = 20682
> <b>555-22346</b> ID = 6806
> <b>SKU 00001</b> ID = SKU 00001
> <b>SKU 00011</b> ID = SKU 00011

**Search Result Profiling**

4 hit(s)  
Click links to narrow down search

**Results by Object Type**

[Product \(4\)](#) - [exclude](#)

[Product \(2\)](#) - [exclude](#)

[Item \(2\)](#) - [exclude](#)

**Results by Position in Tree Hierarchy**

**Results by Parent**  
(Displaying the 5 most common)

[Tire Care Items \(2\)](#) - [exclude](#)

[Ski Jacket Light \(1\)](#) - [exclude](#)

[104061 → Ski Jacket Xtreme \(1\)](#) - [exclude](#)

[Products \(1\)](#) - [exclude](#)

[Ski Jacket Xtreme \(1\)](#) - [exclude](#)

**Finding Missing References:** When the reference type is selected, and this box is checked, the populated results will show all items that have that particular missing reference.

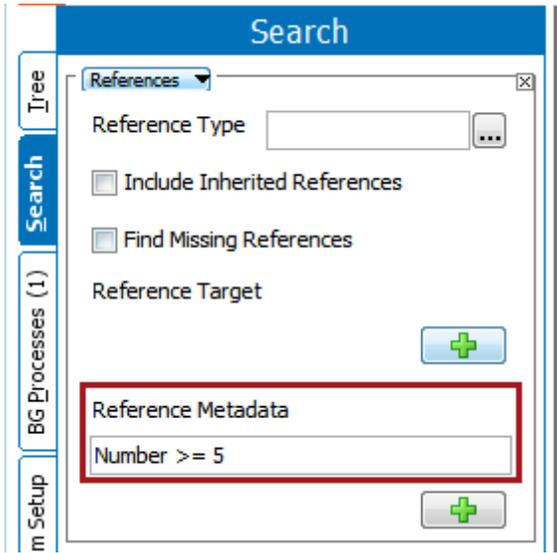
The screenshot shows the 'Search' interface with the 'References' search type selected. The 'Find Missing References' checkbox is checked, and a red arrow points to the 'Reference Target' field. The results section shows 98 hits, with a list of items including '20-68204 ID = 20682', '050-42151 ID = 7825', '555-22346 ID = 6806', '6642 ID = 6642', '7130-03 ID = 6854', and '7133-12 ID = 8081'. The 'Results by Object Type' section lists 'Product (98)', 'Item (46)', 'Salesitem (43)', 'SalesitemFamily (5)', and 'ItemFamily (4)'. The 'Results by Position in Tree Hierarchy' section lists 'Products (21)', 'Products (8)', 'Hats and Caps SalesItems (7)', 'Drinking Items (5)', and 'Hanes T-shirts (5)'. The 'Results by Parent' section lists 'Products (21)', 'Products (8)', 'Hats and Caps SalesItems (7)', 'Drinking Items (5)', and 'Hanes T-shirts (5)'.

### Reference and Referenced By Metadata Attribute Value Searches

Values for metadata attributes may be searched by using the **References** or **Referenced By** search options. Users may indicate any value to search *all* metadata attributes for a matching value. The following pictures will demonstrate with **References**, but know that the same holds true for **Referenced By**.

The screenshot shows the 'Search' interface with the 'References' search type selected. The 'Reference Type' is set to 'Alternative (Alternative)'. The 'Reference Metadata' field is highlighted with a red box and contains the value 'Upsell'. The 'Reference Target' field is empty. The 'Reset' and 'Search' buttons are visible at the bottom.

Alternatively, users may enter an attribute *ID* or *name*, operator, and value for a more restricted search.



---

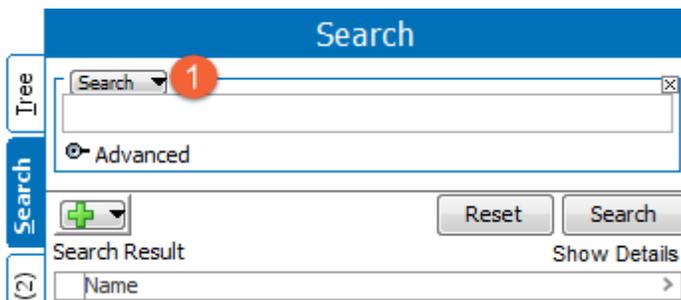
**Note:** It is not possible to perform searches on missing metadata values.

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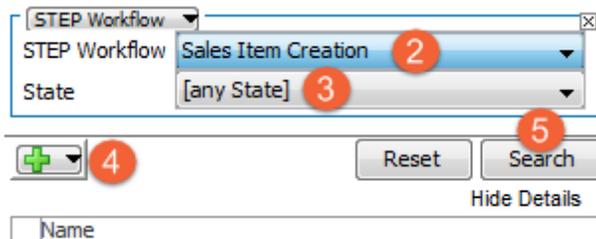
## Workflow

With the **Workflow** search criteria you can search for and monitor STEP workflows. Selecting a specific workflow from the dropdown list will show all items associated with the workflow. You can also specify the workflow state to narrow your search.

1. Navigate to the side **Search** tab and click on it. A small dropdown bar will appear. Click on the dropdown bar and select **Workflow**.



2. A new dropdown bar will appear with a number of options to select from (options will vary depending on client search needs). For the purpose of this example, 'Sales Item Creation' will be used for the STEP Workflow search field.



3. Specify the State you wish to search within from the State dropdown list. Selecting the '[any State]' state option allows you to search the entire workflow, if you prefer not to choose a specific state. For the purposes of this example, '[any State]' will be used for the search.
4. Click the green plus sign to add additional search criteria. (Optional)
5. Click on **Search** to run the search and view results.

STEP Workflow [X]  
STEP Workflow Sales Item Creation  
State [any State]

+ [dropdown]    Reset    Search

Displaying 5 of 5 results    Hide Details

Name >	
>   <b>18207-012</b> 18207	
>   <b>18214-012</b> 18214	
>   <b>18215-012</b> 18215	
>   <b>18217-012</b> 18217	
>   <b>101164</b> 101164	

### Search Result Profiling

5 hit(s)  
Click links to narrow down search

### Results by Object Type

- [Product \(5\)](#) - [exclude](#)
-  [SalesItem \(5\)](#) - [exclude](#)

### Results by Position in Tree Hierarchy

- Results by Parent
-  [T-shirts \(4\)](#) - [exclude](#)
  -  [T-shirts and Sweatshirts \(4\)](#) - [exclude](#)
  -  [Tire Care SalesItems \(1\)](#) - [exclude](#)

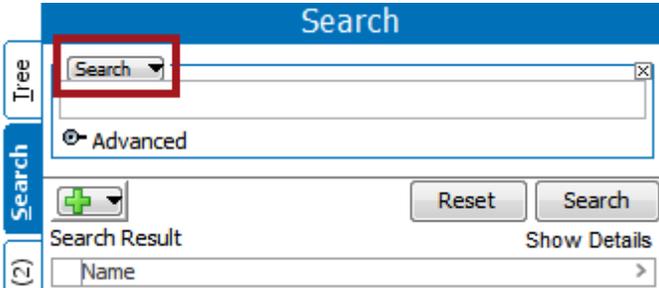
If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

# Unpushed or Failed Assets

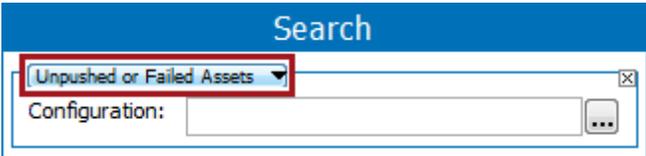
The Unpushed for Failed Assets search criteria allow you to identify Assets that have not been successfully pushed. These assets have an Asset Push Status of "Never been handled", "Asset not in workspace" or "Error".

Configuration	Asset Push Status	Relative Path	Workspace	Visibility
Asset Push Configuration 1 B	✓ Downloaded	AssetPushConfig1B/88/01/8801.jpg	Main	
raw-main	Never been handled		Main	
Asset Push Configuration 1 A	Asset not in workspace		Approved	

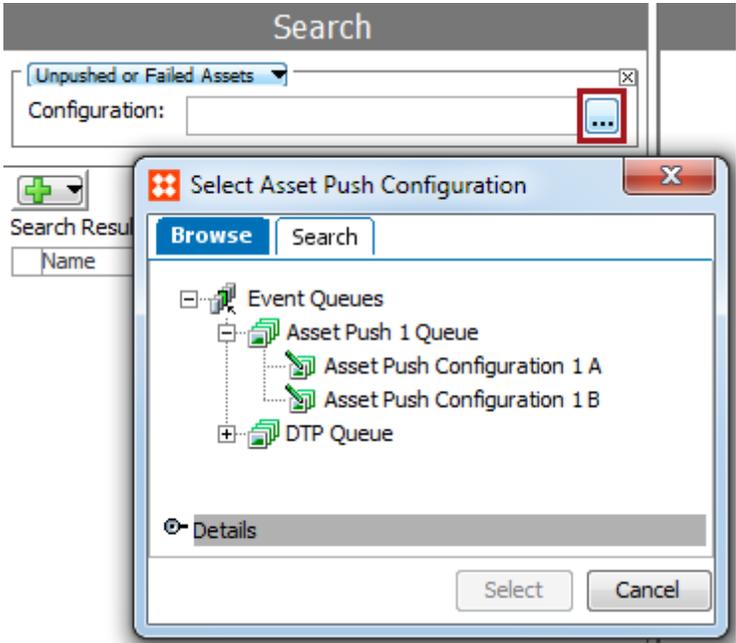
1. On the **Search** tab click the **Search** dropdown.



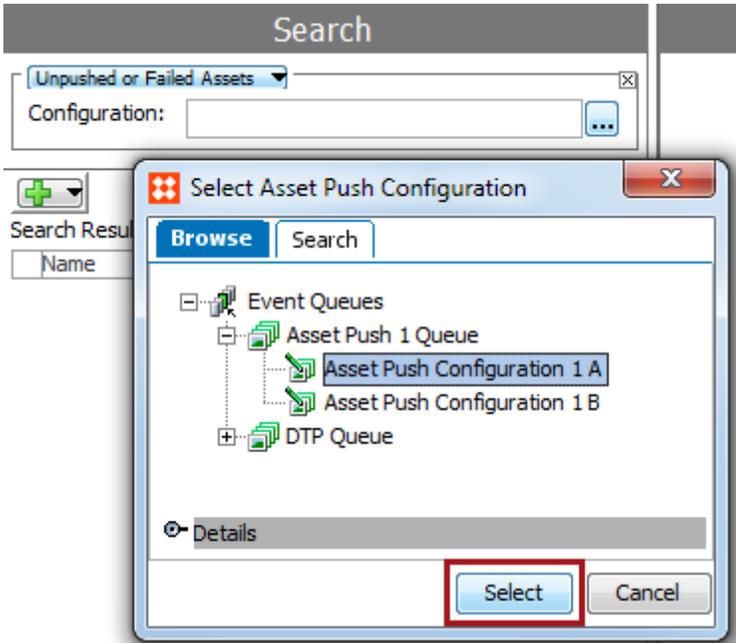
2. Select the **Unpushed or Failed Assets** option.



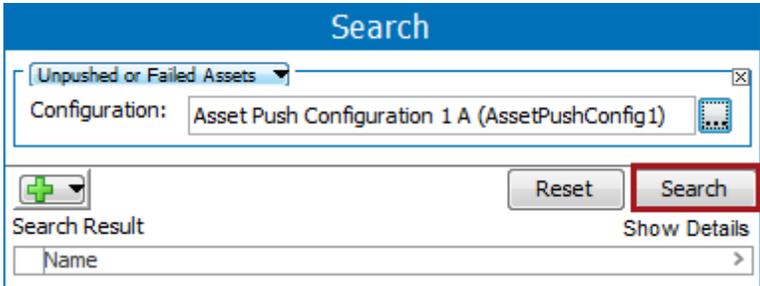
3. Click the ... (ellipsis) button to display the **Select Asset Push Configuration** dialog.



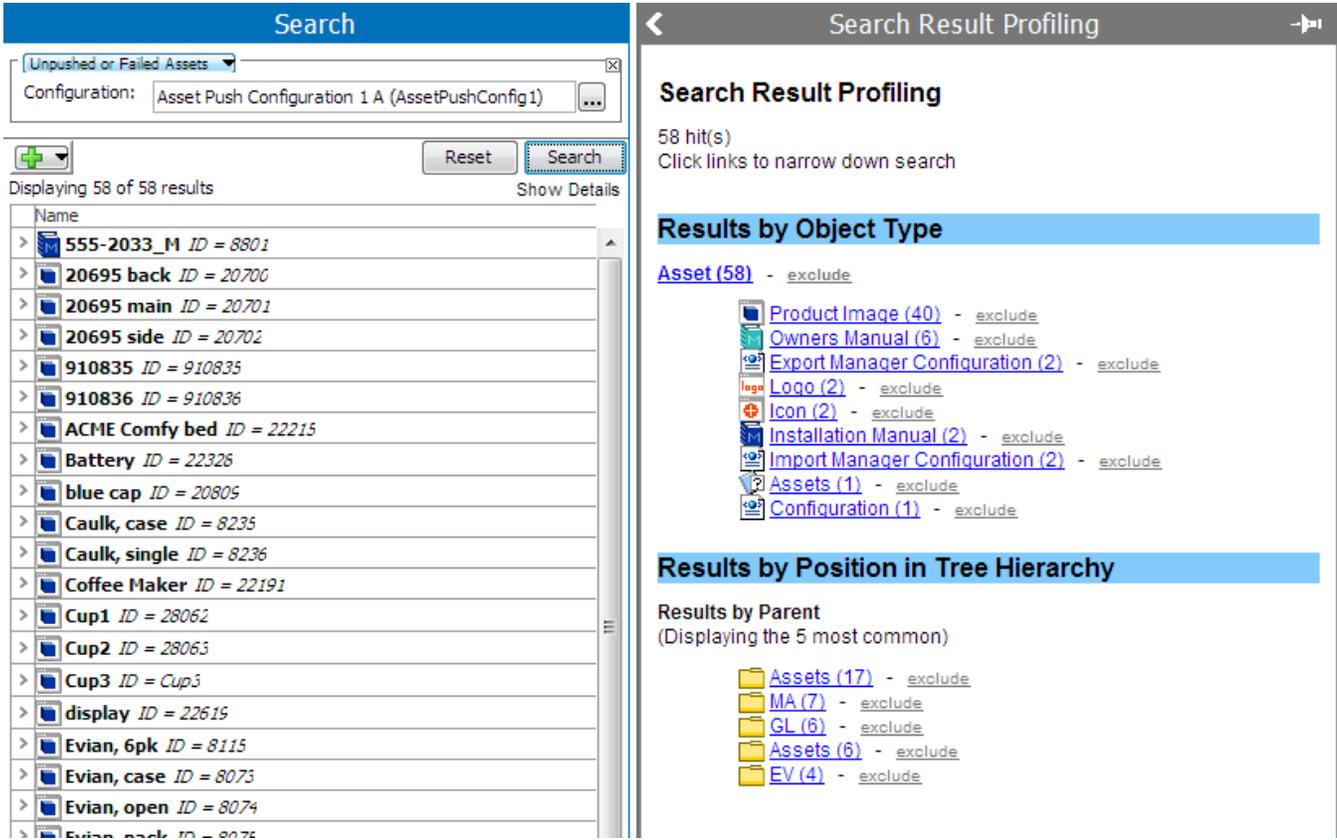
4. Select a configuration and click the **Select** button.



5. Click the **Search** button.



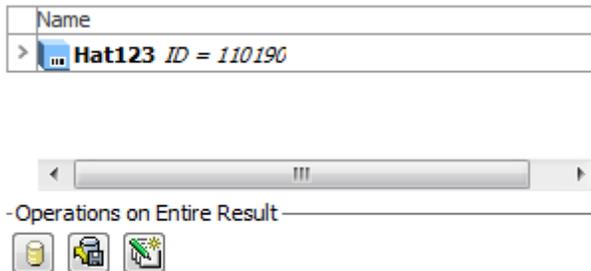
6. The Search Results List and Profiling information are displayed.



**Note:** Click an item in the list link to view it or click a Profiling hyperlink to update the Search Results List.

## Search Operations

There are three operations that can be found at the bottom of the **Search** Tab.



### Exporting a Search Result

After conducting a search it is possible to export the search result by clicking the **Export Search Result** button at the bottom of the **Search** tab.

When clicking the **Export Search Result** button, STEP will attempt to use all the objects in the result as root objects for the **Export Manager** (equating selecting the objects on the **Product Selection** step of the **Export Manager**). Which objects are exported is thus determined by the selected **Export** format and the selections made in the **Export Manger**.

### Saving a Search Result as a Collection

After conducting a search it is possible to save the entire search result as a **Collection**.

When clicking the **Save as Collection** button, a dialog is opened where it is possible to specify the **ID**, **Name**, and location of the new **Collection**.

### Bulk Updating a Search Result

When having conducted a search it is possible to **Bulk Update** the entire search result.

When the **Bulk Update Search Result** button is clicked, the **Bulk Update** wizard appears with the search result selected as the dataset.

---

**Note:** If you only wish to **Bulk Update** some of the objects in the result, you can select or multi select in the search result and then select the **Run Bulk Update** option on the **File** menu

---

## About Bulk Updates

Bulk update is an efficient way of updating multiple objects in a single operation, and it is available on the majority of objects in Tree or System Setup that have an editor.

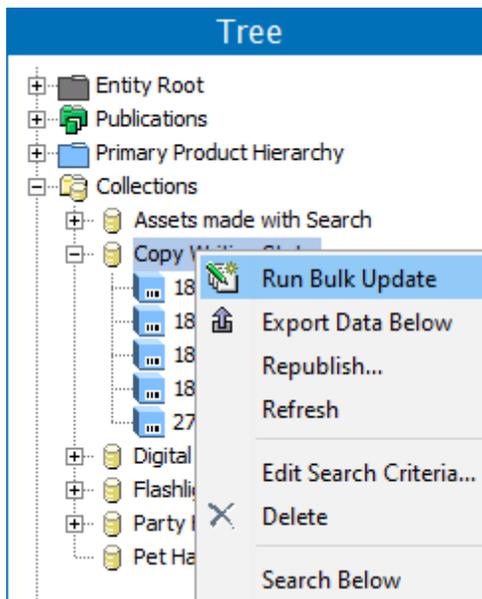
A user can run the bulk update process on a collection, a search result, or objects in tree or system setup. It is also possible to select multiple objects and run a bulk update on all selected objects. See the **Running Bulk Updates** topic within the **Bulk Updates** documentation for more information.

## Running Bulk Updates

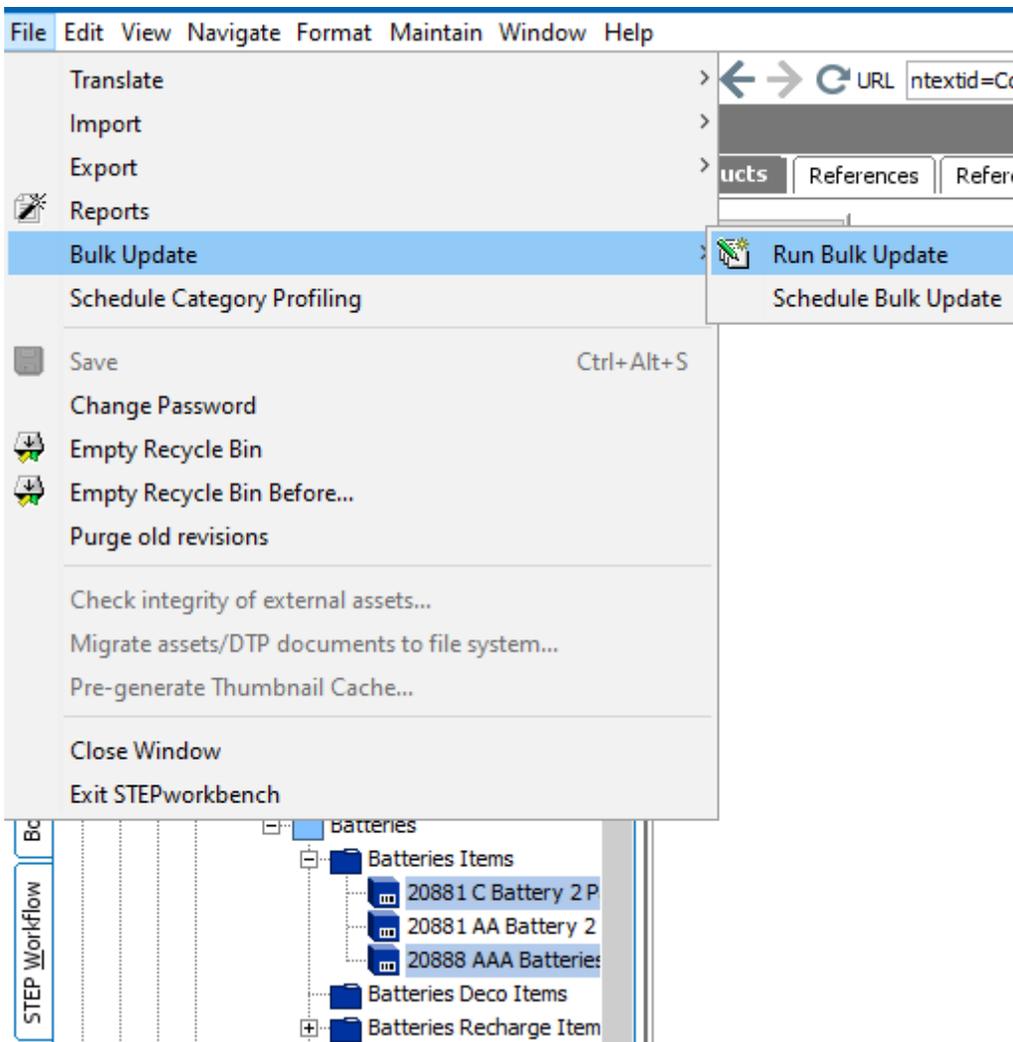
The bulk update functionality allows a user to easily update large amounts of objects in a single operation.

There are three possible ways to run a Bulk Update:

1. It can be run on all objects in a single collection or multiple collections. To do so, right-click the relevant collection(s) in Tree and choose **Run Bulk Update**.



2. It can be run on a single or multiple selected objects in Tree or System Setup. To do so go to File > Bulk Update > **Run Bulk Update**.



## Objects that it can be run on in Tree are:

- Assets
- Classifications
- Collections
- Configurations
- eCatalogues
- Entities
- Index Words
- Products
- Publications

## Objects that it can be run on in System Setup are:

- Attributes
  - Attribute Transformations
  - Asset Importer
  - Change Packages
  - Completeness Metrics
  - Event Processors
  - Event Queues
  - Gateway Endpoints
  - GDSN- Data pool- Receiver or publisher
  - Global Business Rules (actions, conditions, and libraries)
  - Inbound Integration Endpoints
  - Keys
  - List of Values
  - Match Codes and Matching Algorithms
  - Outbound Integration Endpoints
  - Tables
  - Tags
  - Units
  - Users and Groups
  - Web UIs
  - Workflows
  - Workflow Profiles
  - Reference types / link types
  - Object type & structures (asset, classification, publication, setup group, etc.)
  - Context -Dimension points
3. Lastly, it can be run on search results. To do so, perform a search and then click on the **Bulk Update** button,  , at the bottom of the **Search** pane.



For more on how to perform searches using the Search tab in STEP Workbench, see the **Search Overview** topic in the **STEP User Guide / Getting Started** documentation.

After selecting one of the three options above to run a bulk update, the Bulk Update wizard will appear. Steps for navigating through the Bulk Update wizard are described in the **Bulk Update Wizard** in the **STEP User Guide / Getting Started** documentation.

## Scheduling Bulk Updates for Collections

Scheduling a bulk update with collections can be useful for a group of objects that need to be updated on a regular basis. Additionally, should a user want to schedule a group of objects for a bulk update instead of performing it manually, they can only do so using collections. An example of this might be if a user knows that they need all current accessory references removed at a certain time on a group of objects before they are to be implemented into a workflow.

There are a few prerequisites that must take place before a collection is scheduled to run a bulk update.

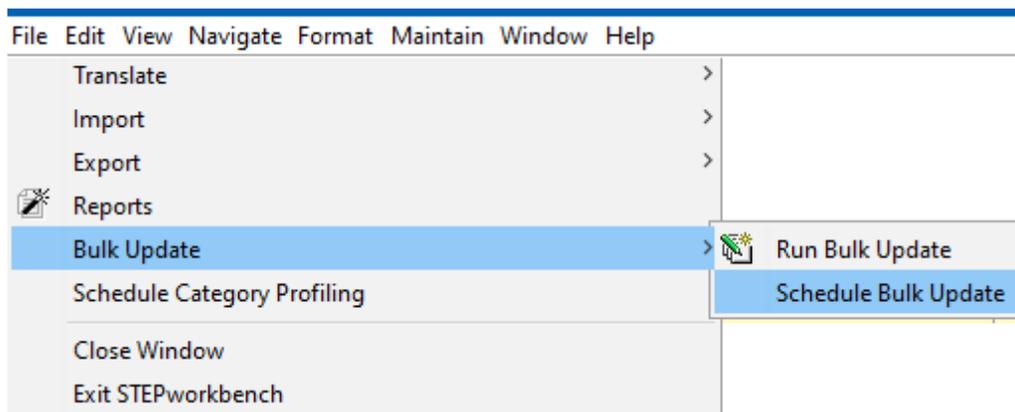
1. A collection must first be created. More on creating a collection can be found in the **Creating Collections and Collection Groups** topic in the **STEP User Guide / Getting Started** documentation.
2. A bulk update configuration must be created. See Running Bulk Updates in the STEP User Guide / Getting Started documentation for more on how to configure a bulk update.

The steps below explain how to schedule a bulk update using collections.

### Scheduling Bulk Updates

If a user wishes to perform a bulk update on a collection at regular intervals, they can create a schedule that applies to that particular collection. The bulk update is then automatically run at the scheduled time.

To begin, open the Schedule Bulk Update wizard by going to File > Bulk Updates > **Schedule Bulk Updates**.



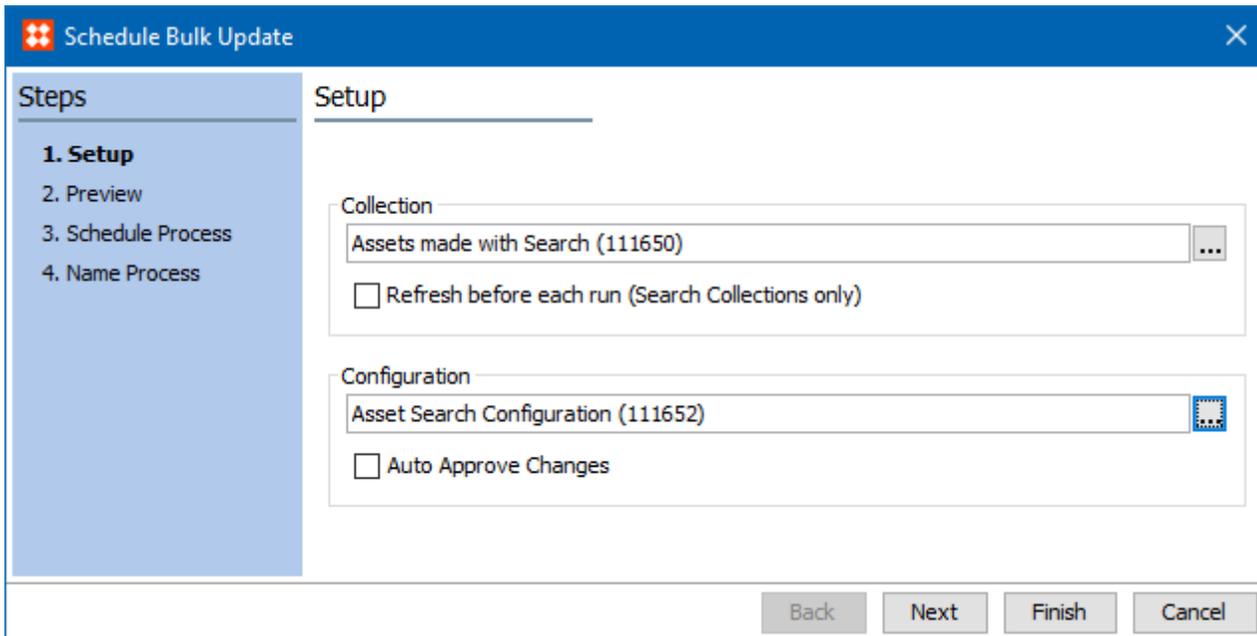
### Step 1 - Setup

On the first screen, specify the collection and the configuration that is needed.

1. Click the ellipsis button (...) to locate and select the relevant collection. If the collection selected is created using the search criteria, and the **Refresh before each run (Search Collections only)** check box is selected, it will refresh the collection based on the current data in the STEP system using search criteria, and execute the

bulk update operations. If the collection was created by going to File > Bulk Update > Run Bulk Update, then this option will not be valid.

2. Click the ellipsis button (...) to locate and select the relevant configuration.
3. Check **Auto approve changes** if you want to place the updated objects in the approved workspace immediately after the update.
4. Click **Next**.



## Step 2 - Preview

This screen shows an examples of the results of the update. Click **Next** to continue.

**Schedule Bulk Update**

**Steps**

1. Setup
- 2. Preview**
3. Schedule Process
4. Name Process

**Preview**

Object >		Set single value [Caption1] >	
> HYD543	Old		
>	New	Pictures by Stibo Inc.	
> RP4100	Old		
>	New	Pictures by Stibo Inc.	
> Glasses	Old		
>	New	Pictures by Stibo Inc.	
> Evian, case	Old		
>	New	Pictures by Stibo Inc.	
> Evian, open	Old		
>	New	Pictures by Stibo Inc.	
> Evian, pack	Old		
>	New	Pictures by Stibo Inc.	
> Evian, 6pk	Old		
>	New	Pictures by Stibo Inc.	

Back Next Finish Cancel

### Step 3 - Schedule Process

In Step 3, create the time schedule. Select either **Now**, **Later**, **Weekly** or **Monthly**. The available options depend on user selection. Select the options needed, and then click **Next**.

**Schedule Bulk Update**

**Steps**

1. Setup
2. Preview
- 3. Schedule Process**
4. Name Process

**Schedule Process**

**Start**

Now

Later

**Weekly**

Monthly

Later and repeat

Start at (hh:mm):

Start on (yyyy-mm-dd):

End on (yyyy-mm-dd):

Every:

Mon

Sat

Tue

Sun

Wed

Thu

Fri

Start every mon at 11:04, starting 2016-08-19

Back Next Finish Cancel

### Step 4 - Name Process

In the final step, enter a name for the **Schedule Process** and for the **Process**. Click **Finish** to complete the wizard.

The screenshot shows a software window titled "Schedule Bulk Update" with a close button in the top right corner. On the left, a "Steps" sidebar lists four steps: "1. Setup", "2. Preview", "3. Schedule Process", and "4. Name Process", with the fourth step highlighted. The main content area is titled "Name Process" and contains two text input fields. The first field is labeled "Schedule Process Name:" and contains the text "Scheduled Bulk Update". The second field is labeled "Process Name:" and contains the text "Bulk Update". At the bottom of the window, there are four buttons: "Back", "Next", "Finish", and "Cancel". The "Finish" button is highlighted with a dashed border.

Upon hitting **Finish**, it will give the user an option of going to the background process. If selected it will take the user to the background process tab and display the background process.

← Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19) - Background Process →

**Background Process**

📍 Properties

Property	> Value	>
Started by	USERL	
Id	BGP_111657	
Description	Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19)	
Execution Server	doc-rel	
Status	waiting - 1 of 1 in SCHEDULE	
Created	Fri Aug 19 11:13:35 EDT 2016	
Started	Fri Aug 19 11:13:36 EDT 2016	
Finished	Fri Aug 19 11:13:36 EDT 2016	
Processing Time	0 m 0 s	
Time in Queue	0 m 1 s	
# of warnings	0	
# of errors	0	
Start After	Mon Aug 22 11:04:00 EDT 2016	

📍 Execution Report

- 1 Collection: [Assets made with Search](#)
- 2 Configuration: [Caption 1 Configuration](#)

⏪ ⏩ 1-2 of 2 ⏪ ⏩ Save... Truncate

If the bulk update is scheduled, then it will show under 'Queued process'.

**BG Processes**

- STEP Workflow Profiling
- Scheduled Processes
  - Queued Processes
    - Scheduled Bulk Update (every mon at 11:04, starting 2016-08-19)**
  - Active Processes
  - Ended Processes

## Bulk Update Operations

There are a number of operation options available when performing a bulk update. Because more than one operation type can be applied during a bulk update, and the order in which the operations are listed matter when performing a bulk update, it is important to fully understand what each operation does.

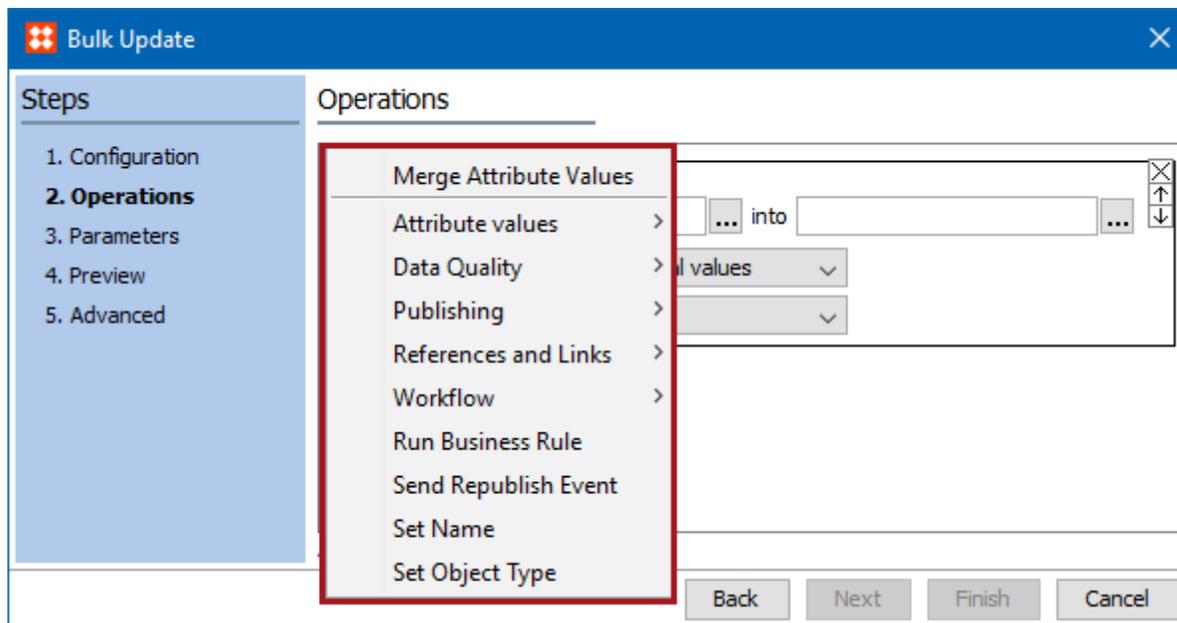
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**Note:** Ensure that the operations are listed in the order that they are needed to perform. Operations are performed from the top down. This means that operations further down the list overwrite operations further up.

---

The following sections contain explanations of each operation type available in the Bulk Update wizard.

Operations are specified in Step 2 of the Bulk Update wizard.



See the **Running Bulk Updates** topic within the **STEP User Guide / Getting Started** documentation for more information on the Bulk Update wizard.

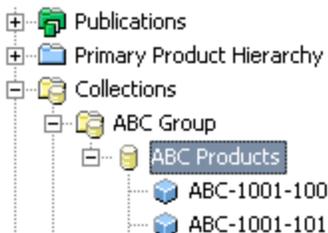
For some of the operations, a user can specify a function in the Function editor. See the **Function Editor Overview** topic within the **Attributes** documentation for more information on writing functions.

## Collections and Collection Groups

This section describes the functionality associated with the **Tree** hierarchy objects **Collection** and **Collection Group**.

**Collections** are containers for storing sets of objects and **Collection Groups** are containers that can hold **Collections** or other **Collection Groups**.

**Collections** and **Collection Groups** are found in the **Collections** hierarchy on the **Tree** tab.



**Collections** are used in relation with the **Bulk Update** functionality but can also serve as a useful tool when working with Workbench in general.

**Collections** can, with a few exceptions, contain any type of objects to be found in the **Tree** and **System Setup** tab hierarchies.

If a **Collection** contains less than 10.000 objects, these can be inspected in the **Tree** hierarchy by expanding the **Collection** node.

When expanded, all objects in the **Collection** will be displayed in an entirely flat structure regardless of any parent-child relations that may exist between the objects and regardless of which parents/children the objects have when viewed elsewhere in STEP.

Besides the fact that **Collections** can hold more types of objects than **Classifications**, a key benefit is that objects are not affected (changing approval status) when included in a **Collection**. Nor will the objects be affected when you delete the **Collection**.

---

**Note:** **Collection** objects are not under revision control and can not be made dimension dependent, meaning that the **Collection** objects will be the same across all **Workspaces** and **Contexts**. The content of a **Collection** will, however, be filtered according to **Workspace/Context** visibility and also according to the privileges of the user inspecting the **Collection**.

---

## Creating Collections and Collection Groups

**Collections** are containers for storing sets of objects and **Collection Groups** are containers that can hold **Collections** or other **Collection Groups**. Below are instructions for configuring both **Collection Groups** and individual **Collections**.

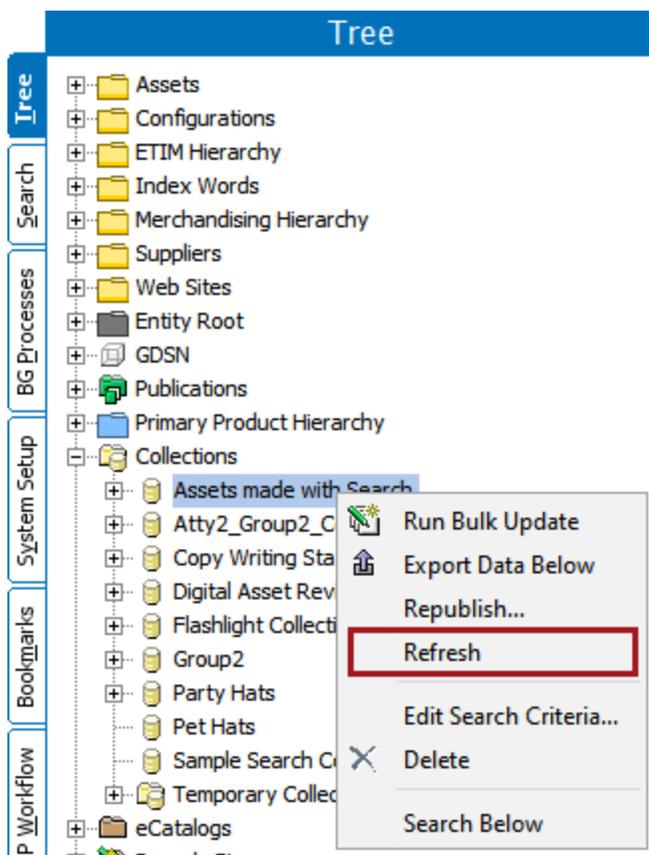
### Creating a Collection

**Collections** can either be created from a search result or using an import.

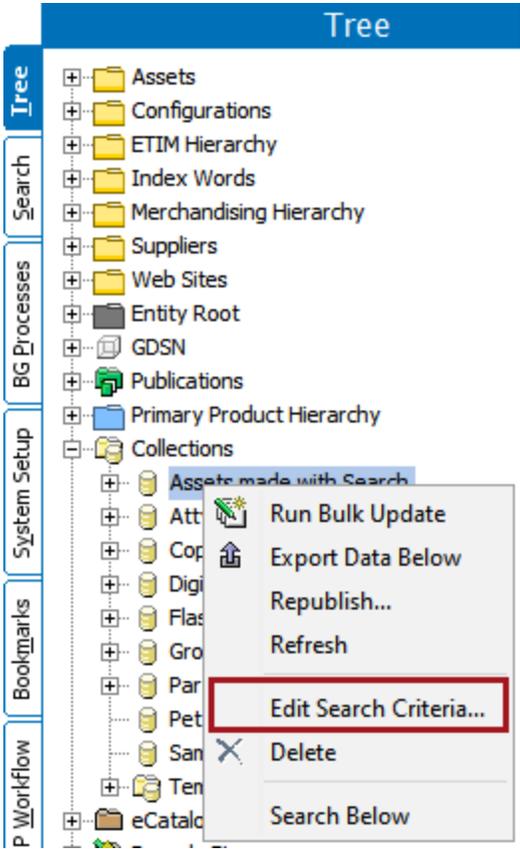
#### Creating a Collection from a Search Result

When you have performed a search, it is possible to save the result as a **Collection**, by clicking **Save as Collection** at the bottom of the **Search** tab. A dialog box appears, where you have to specify the **ID** and **Name** of the new **Collection** and also select where in the **Collections** hierarchy the **Collection** should be created.

**Collections** created from searches can be updated by selecting **Refresh** on the **Collection** context menu as shown below.

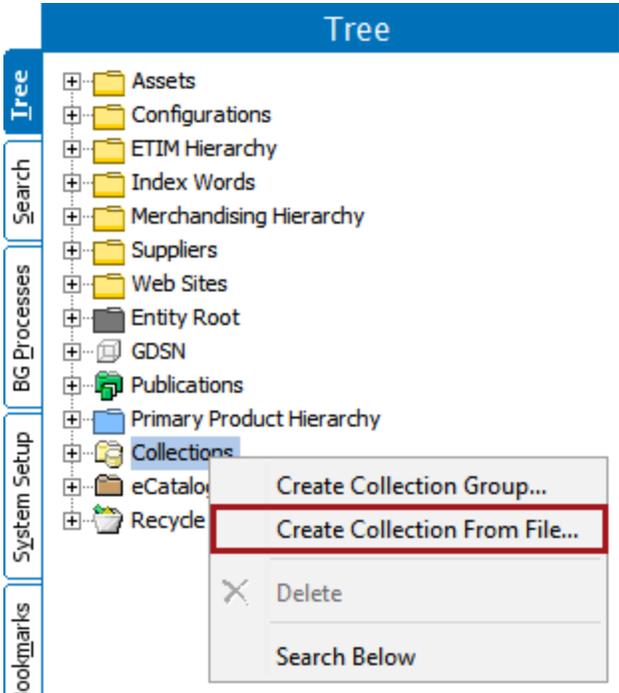


**Collections** created from searches can also be edited by selecting **Edit Search Criteria** on the **Collection** context menu as shown below.



### Creating a Collection with a File Import

You can create a **Collection** using a file import. Right-click a **Collection Group**, then select the **Create Collection From File...**



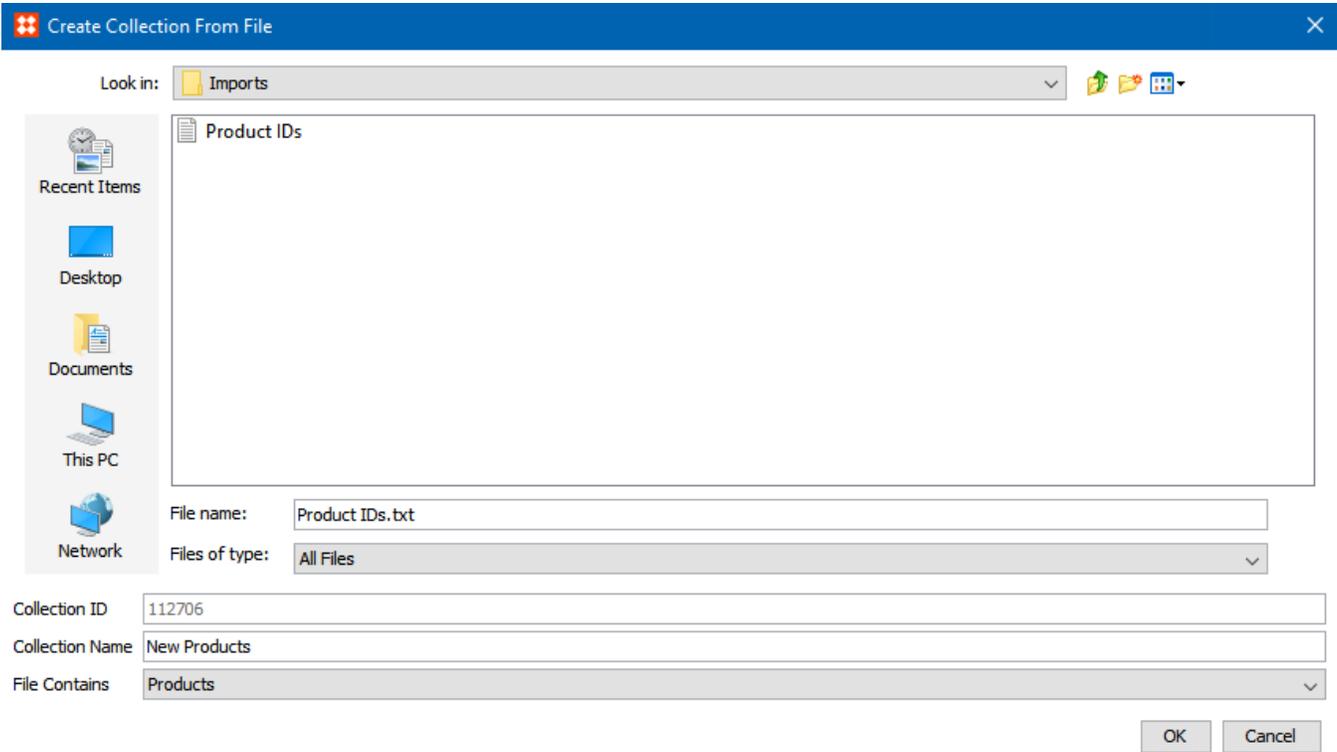
**Collections** can be created from text files (specifically, files with \*.txt extensions) containing newline separated **ID's** of either **Products**, **Assets** or **Classifications**.

---

**Note:** Objects in the import file should already exist in STEP. Thus, the import will not create objects, only place them in a **Collection**.

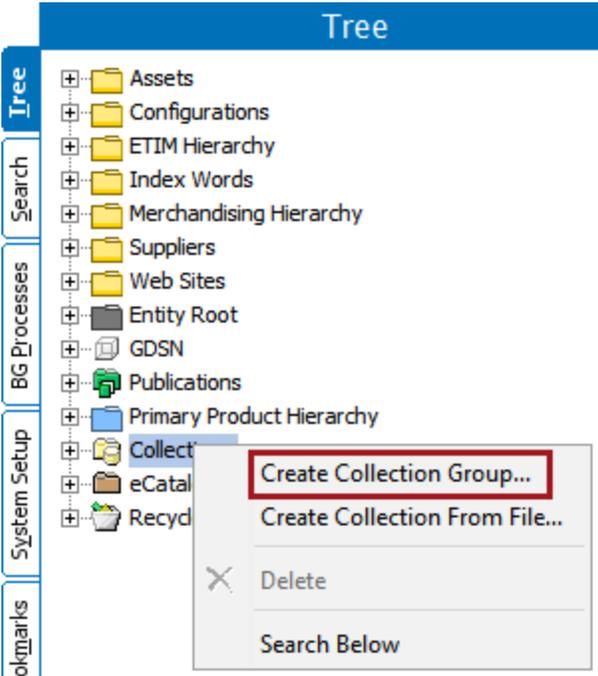
---

A **Create Collection From File** dialog box appears. Locate the file to be imported, then specify an **ID** and a **Name** for the new **Collection** and select whether the import file contains ID's of **Products**, **Assets** or **Classifications**.

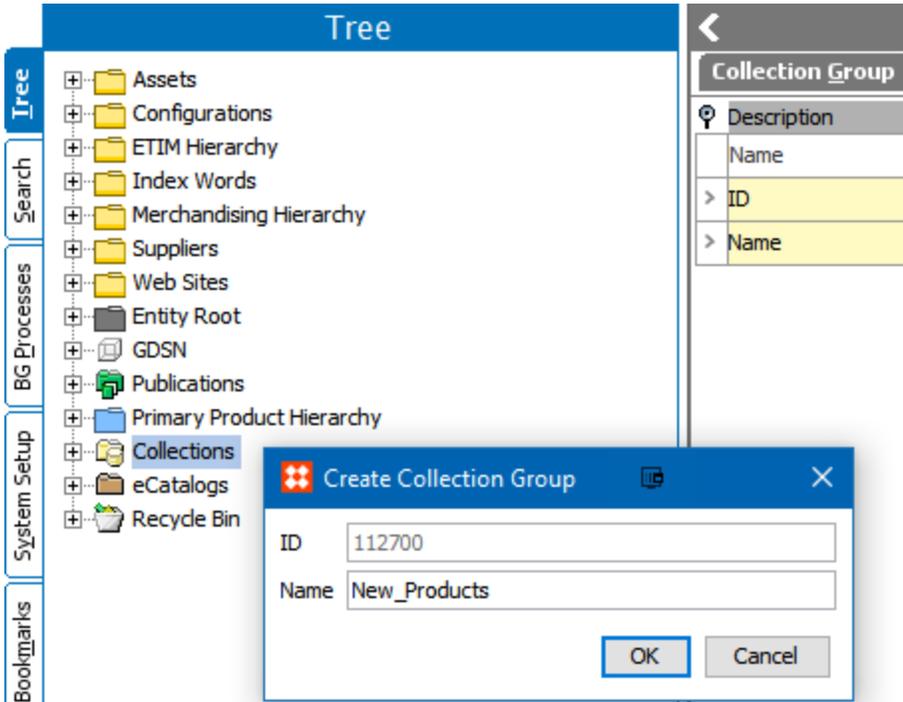


## Creating a Collection Group

In order to create a new **Collection Group**, right-click either the top-level **Collections** node or an existing **Collection Group** in **Tree**, then select **Create Collection Group...**



A Create Collection Group dialog box appears. Enter an **ID** and a **Name** for the new object.



## Collection Properties

Apart from **ID**, **Name** and **Last Edited By**, **Collections** have two properties.

**Number of Objects:** The total number of objects in the Collection. The count is not filtered according to Context / Workspace visibility and / or privilege checks.

**Search URL** (only shown on **Collections** created from search result): STEP URL of the search from which this **Collection** was created. You can copy the URL, paste it in to the URL field, press ENTER and see the search in the **Search** tab.

# Collection Statistics

Using the **Collections Statistics** flipper you can quickly get an overview of which types of objects your **Collection** contains. Click **Statistics** to open the **Collection Statistics** view.

The screenshot shows the 'Hats and Such - Collection' page. At the top, there are tabs for 'Collection', 'Data Profile', and 'Log'. Below the tabs is a 'Description' section with a table of key-value pairs. The 'Statistics' section is expanded, showing 'Collection Content' with 34 objects and a 'Content by Object Type' breakdown.

Name	Value
ID	110611
Name	Hats and Such
Estimated Amount of Obj...	34
Search URL	step://search?args0.0=topnodetype%3dproduct%2ctopnodeid%3d18200&search0.0=BelowCriteria
Last edited By	2015-10-02 14:40:24 by USER

**Statistics**

**Collection Content**

34 object(s)  
Notice: Objects in Collection may be hidden in Tree due to Context/Workspace visibility and/or privilege checks

**Content by Object Type**

Product (34)

- SalesItem (13)
- Item (9)
- Level3 (2)
- ItemFolder (2)
- Level2 (2)
- ItemFamily (2)
- SalesItemFolder (2)
- Level1 (1)
- SalesItemFamily (1)

## Deleting Collections and Collection Groups

**Collections** and **Collection Groups** can be deleted using either the context menu **Delete** option, the **Delete** option in the **Object** menu or the STEP delete icon (X).

---

**Note:** All **Collections** / **Collection Groups** below a **Collection Group** must be deleted in advance before it can be deleted.

---

## Overview of Asset Maintenance

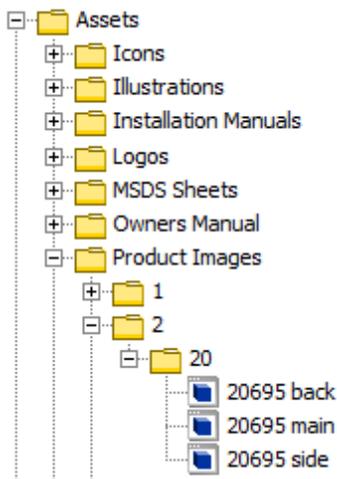
STEP Workbench defines an **Asset** as any product-related electronic file, such as images (tiff, eps, jpeg, etc.), Word docs, Excel files, PDFs, PowerPoint files, text files, etc. Images are a common asset so they will be the focus of this section. In most cases, the terms “asset” and “image” are interchangeable.

Although any image can be loaded into STEP Workbench regardless of its quality or origin, it is important that a quality check be performed by users with graphic arts knowledge. Ideally, this check occurs prior to STEP Workbench import so that only approved images are available in the system.

## Classification of Assets

As with products, the most logical way to maintain assets is to classify them within a structured hierarchy. This hierarchy may have as many levels as necessary to make a practical classification. Mostly, this classification will function as a method to easily navigate and find assets.

In this sample asset hierarchy, the folder icons represent the different levels in the classification. Each asset will have a representative icon that is industry standard to the specific file type.



STEP Workbench does not require that the image hierarchy have multiple levels. Assets can be stored in a single folder (a flat structure). This is not recommended since it can be impractical to navigate as the number of assets increases.

## Asset File Type Designation

When loaded, each asset will be recognized by STEP Workbench and assigned the correct Object Type (i.e., tif, eps, pdf, etc.). Each asset’s Object Type is displayed in the STEP Workbench with the industry standard icon associated with that file format.

## Image Handling

### Image Pipelines

Different publishing projects impose various requirements on the use of images. For example, a highres image in STEP Workbench may be a TIFF. However, for the web, a jpeg is needed. Or, if the highres is an EPS, a GIF may be needed instead of a jpeg.

To handle these scenarios, STEP Workbench can use the “original” highres image to generate the needed image versions based on a set of templates or Image Pipelines. When using an Image Pipeline, the images in STEP Workbench must be of sufficient quality to allow these variations to be properly created.

Image Pipelines are built and configured by Stibo personnel according to a customer’s unique specifications. A pipeline ensures:

- No manual creation of web images
- Consistency in image generations
- Images are delivered dynamically when generating web pages

### Image On-Demand Variants

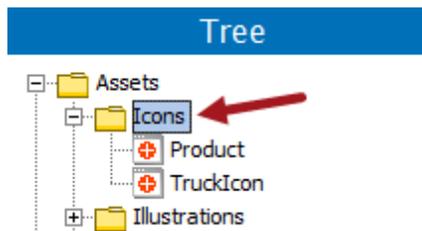
Image On-Demand Variants allow you to create custom versions of images “on demand” from the highres version. A wizard allows you to download the original highres image or create a new image by manipulating the DPI, file format, color information or compression.

## Importing Assets

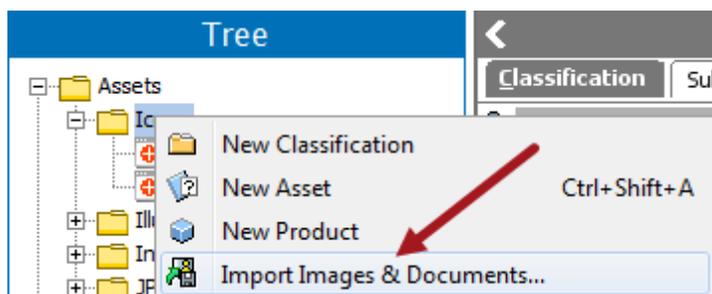
**Note:** You can start the Import Wizard by selecting asset files on your computer Desktop / Finder; dragging them into STEP Workbench and dropping them on the desired target destination. The Import Asset dialog will appear with the import file location and target destination displayed.

To run the Import Images and Documents wizard:

1. Click the folder where the new assets belong.



2. Right-click and select **Import Images & Documents** from the context menu.

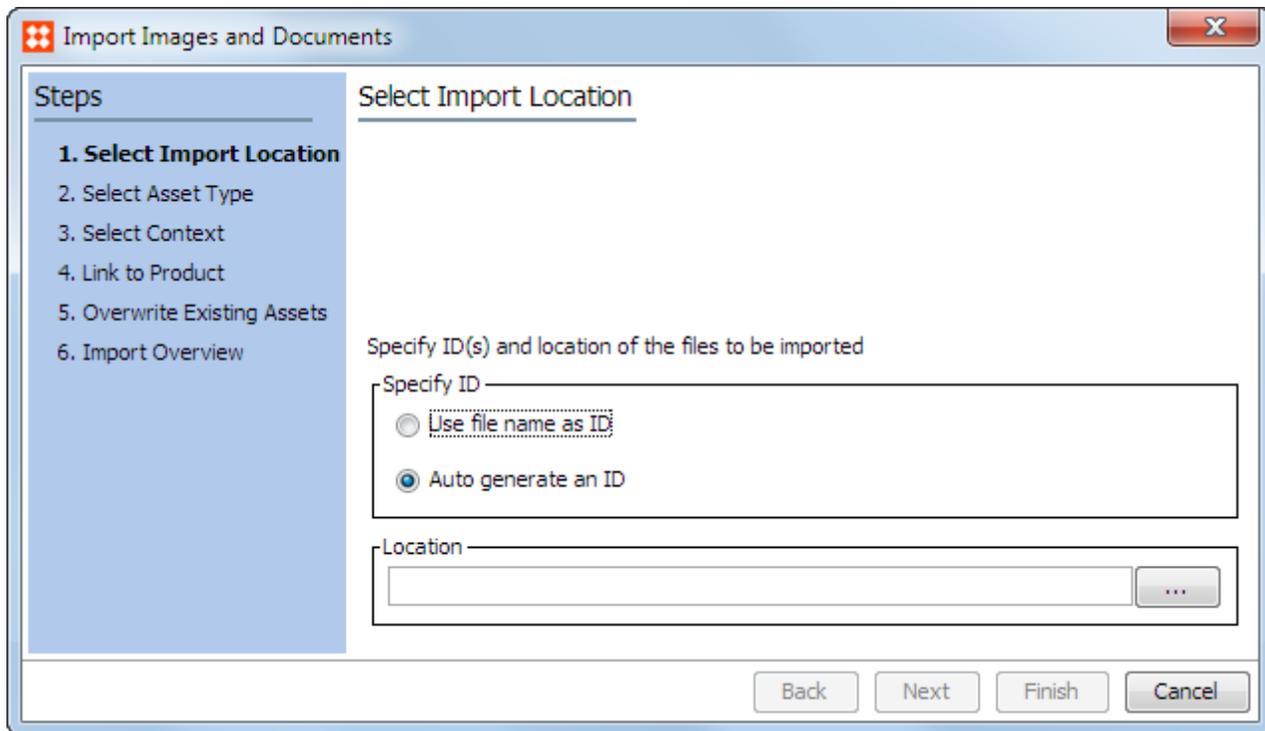


3. On the wizard, select one of the **Specify ID** options.

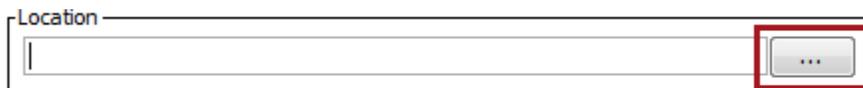
- **Use file name as ID** sets the file name as the image ID attribute.

**Note:** If you want to link the imported images as the Primary Image for Products that exist in STEP Workbench, the image file name (excluding extension, e.g. jpg, tif, doc) must match the Product ID.

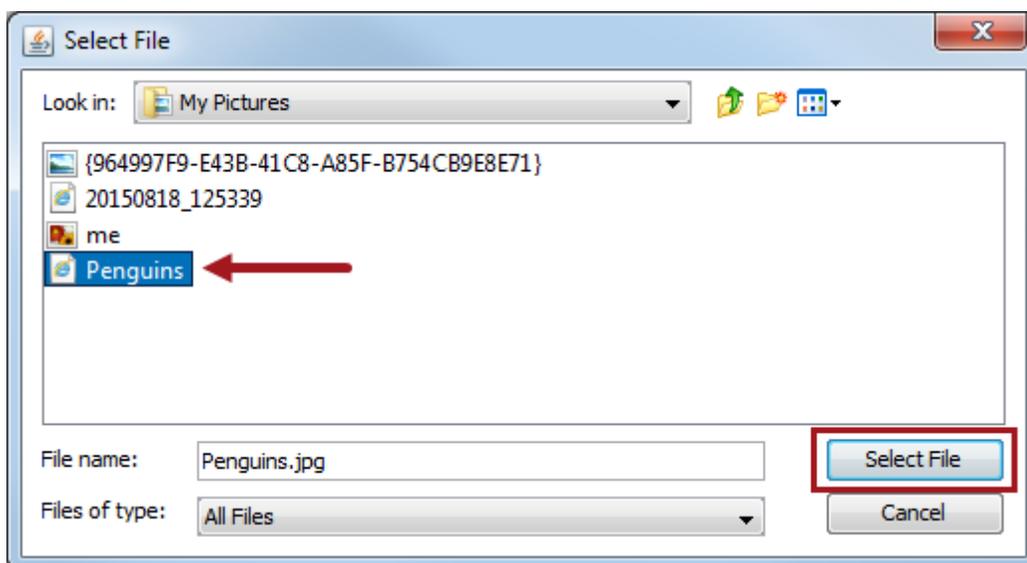
- **Auto generate an ID** sets a unique value as the image ID attribute.



4. For **Location** click the ...(ellipsis) button.



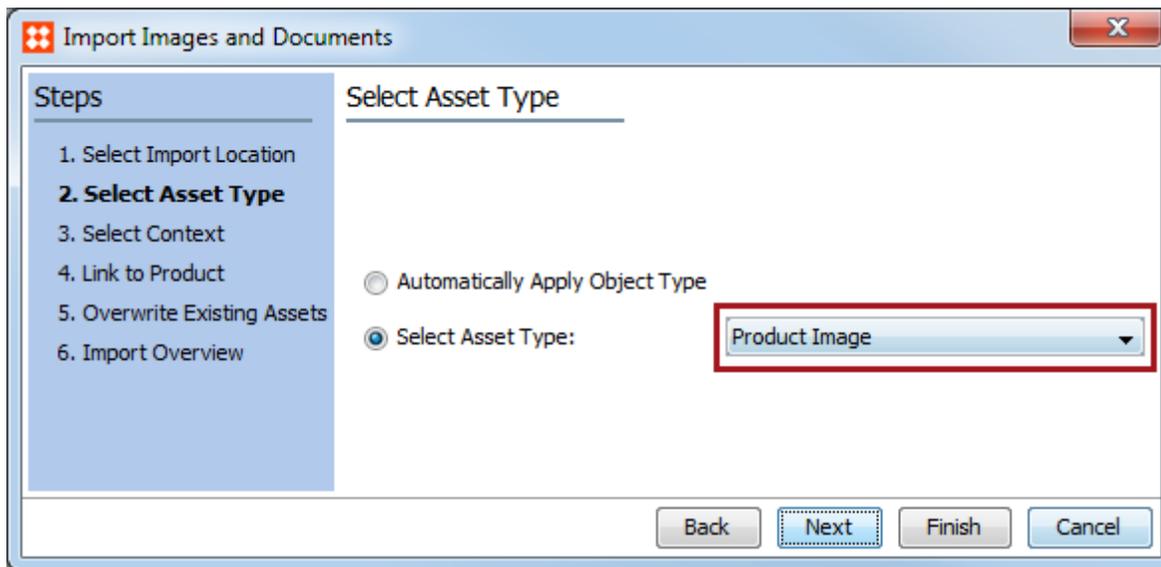
5. On the **Select File** dialog select individual images or folders to upload and click **Select File**.



**Note:** If you select a folder, images within subfolders will also be imported.

6. Click the **Next** button.

7. Select the intended **Asset Type** selected click **Next**.



---

**Note:** STEP Workbench may be configured to automatically recognize the file type. However, selecting the Asset Type ensures the item can be assigned to your product successfully.

---

8. With **None - Import independent of dimensions** selected, click **Next**.

---

**Note:** When STEP Workbench is configured for languages, Context Dimensions allows you to select a specific language. For example, an image with embedded text in French could be loaded into the French context.

---

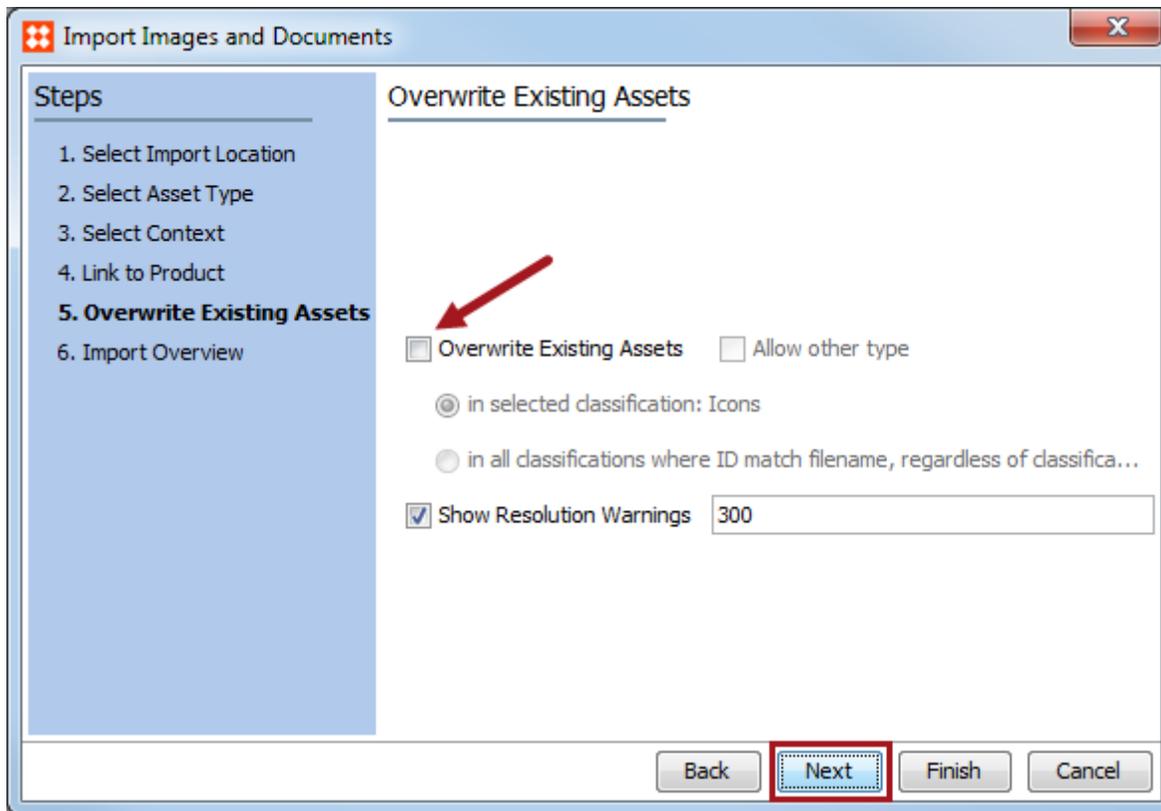
9. If desired, check the **Link to Product** checkbox and set the qualifiers / delimiters to link the images to products. Click **Next**.

The screenshot shows a dialog box titled "Import Images and Documents" with a close button (X) in the top right corner. On the left, a "Steps" sidebar lists six steps: 1. Select Import Location, 2. Select Asset Type, 3. Select Context, 4. **Link to Product**, 5. Overwrite Existing Assets, and 6. Import Overview. The main area is titled "Link to Product" and contains the following options:

- Link to Product!**
- Match on Full Name
- Enter a Delimiter:
- Match Before Delimiters
- Match After Delimiters
- Match the First  Characters After the Delimiter
- Match Between Position  and
- Match Between Delimiter  and
- Select Reference Type:

At the bottom, there are four buttons: "Back", "Next" (highlighted with a red box), "Finish", and "Cancel".

10. To prevent accidental overwriting of existing assets, leave the **Overwrite Existing Assets** checkbox unchecked. Click **Next**.

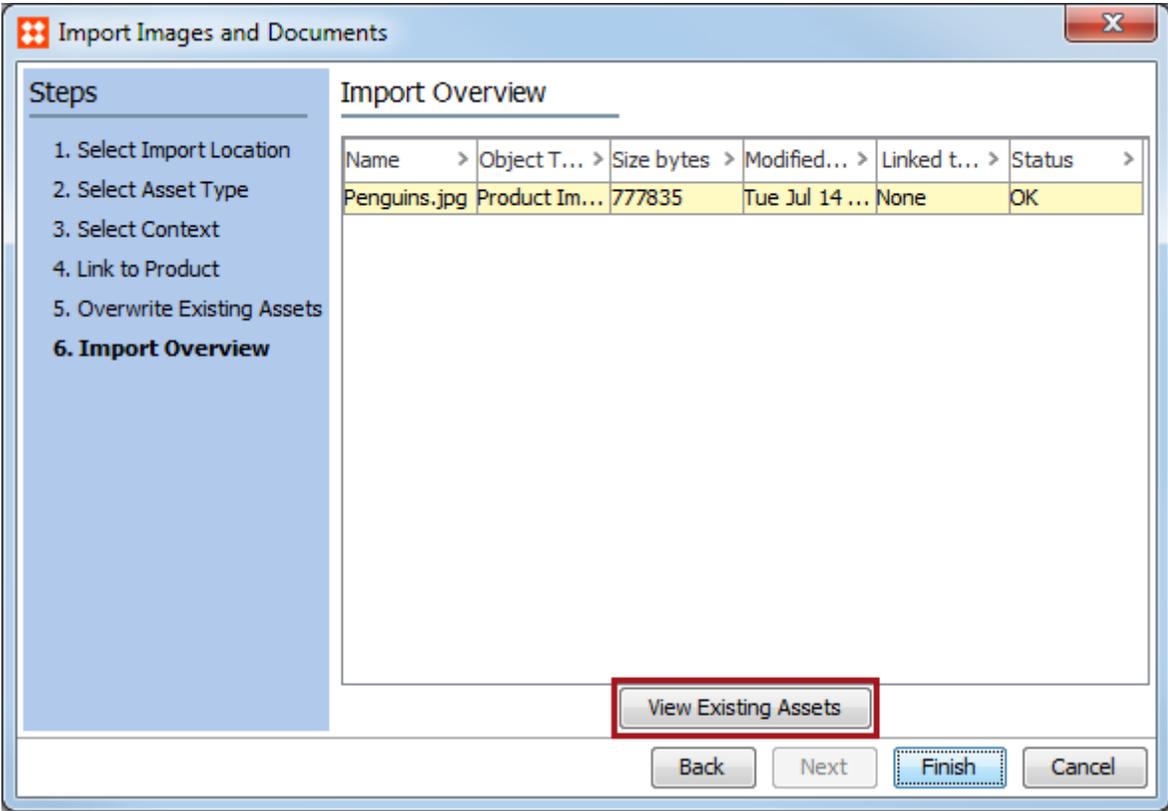


11. Review the **Import Overview** screen.

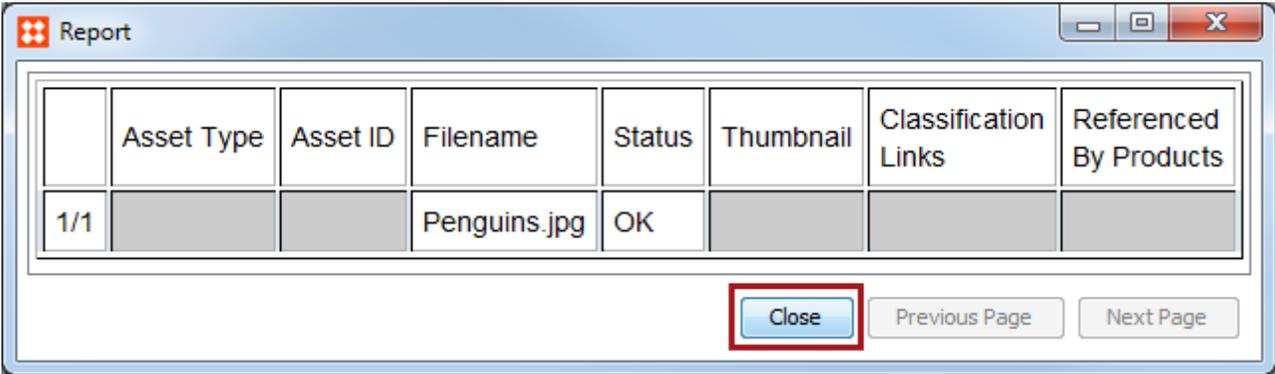
The Overview shows any problems with the import. The Status column reports:

- Status = Skipping when the image already exists and you selected not to overwrite
- Status = Overwriting when you chose to overwrite existing images and an image with the same name exists
- Linked to Product = File Name / Product ID is displayed if a match exists. "None" is displayed when no match is found.

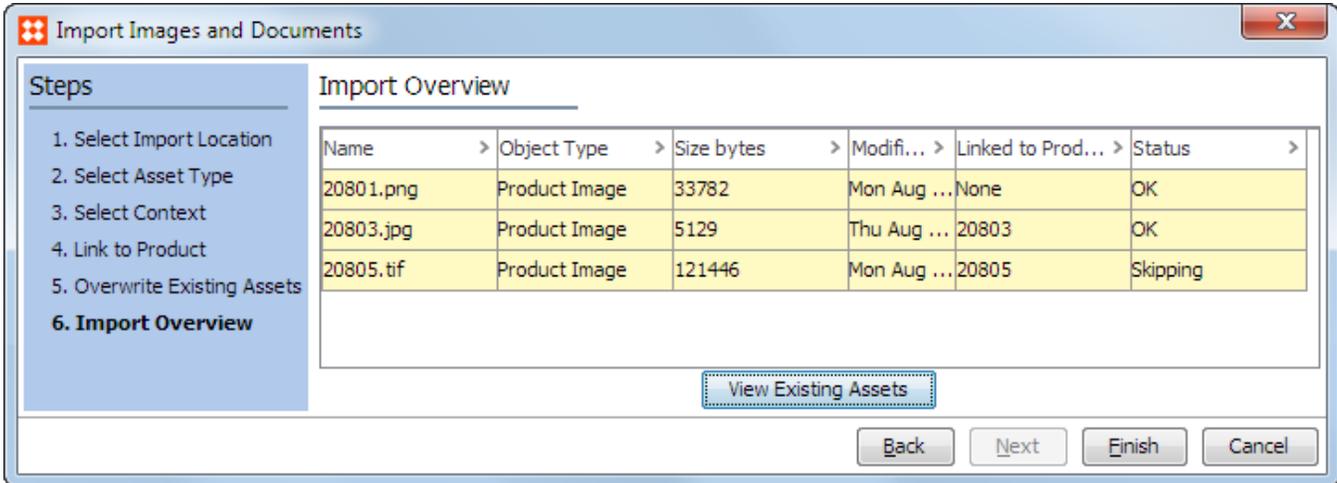
To view a report of the assets to be imported, including the existing assets, click the **View Existing Assets** button in the Import Overview screen.



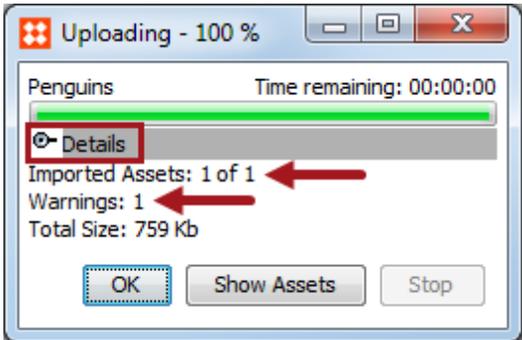
12. A report window appears where you can view the various assets to be imported. The assets that already exist in the database will include thumbnail, Referenced by Products, and Classification Link. Click **Close** on the report window.



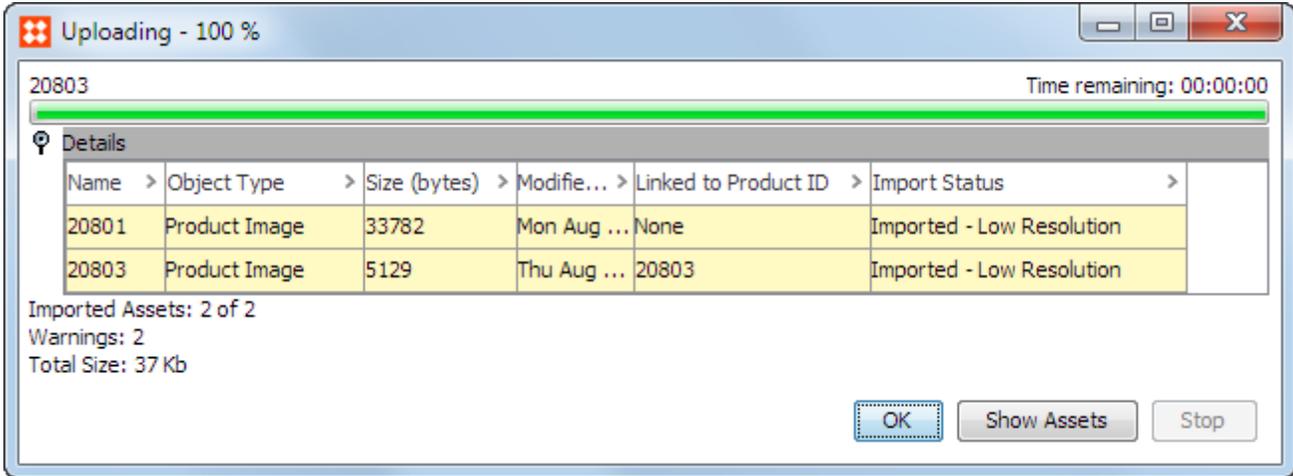
13. If you are satisfied with the overview, click **Finish**.



14. An import status window shows the count of warnings and errors during the upload. Click the **Details** flipper.



15. The status of each asset is displayed.

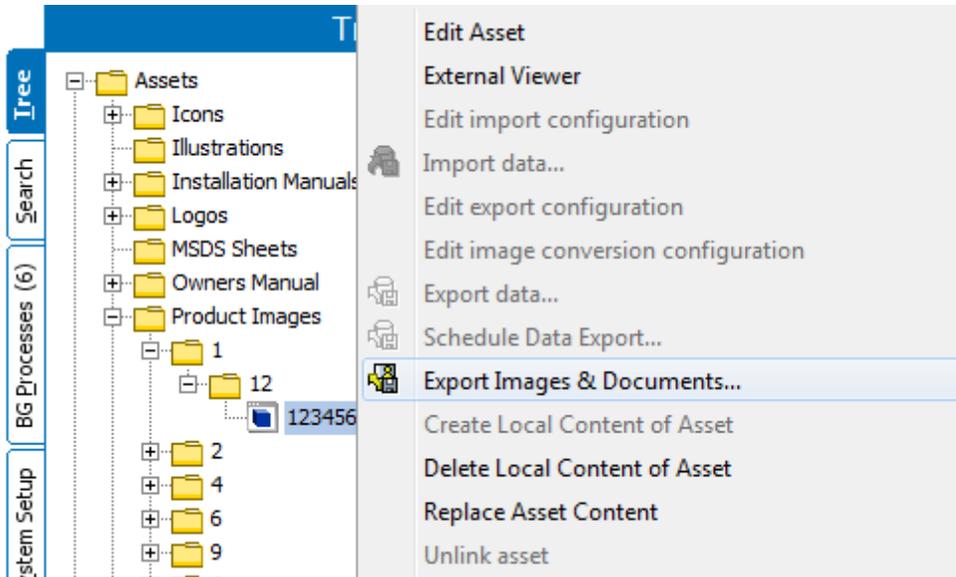


## Exporting Assets

An individual asset or a folder of assets can be exported.

1. For this example, select the image or folder of images, and select **Export Images & Documents**.

This will bring up the Export wizard.

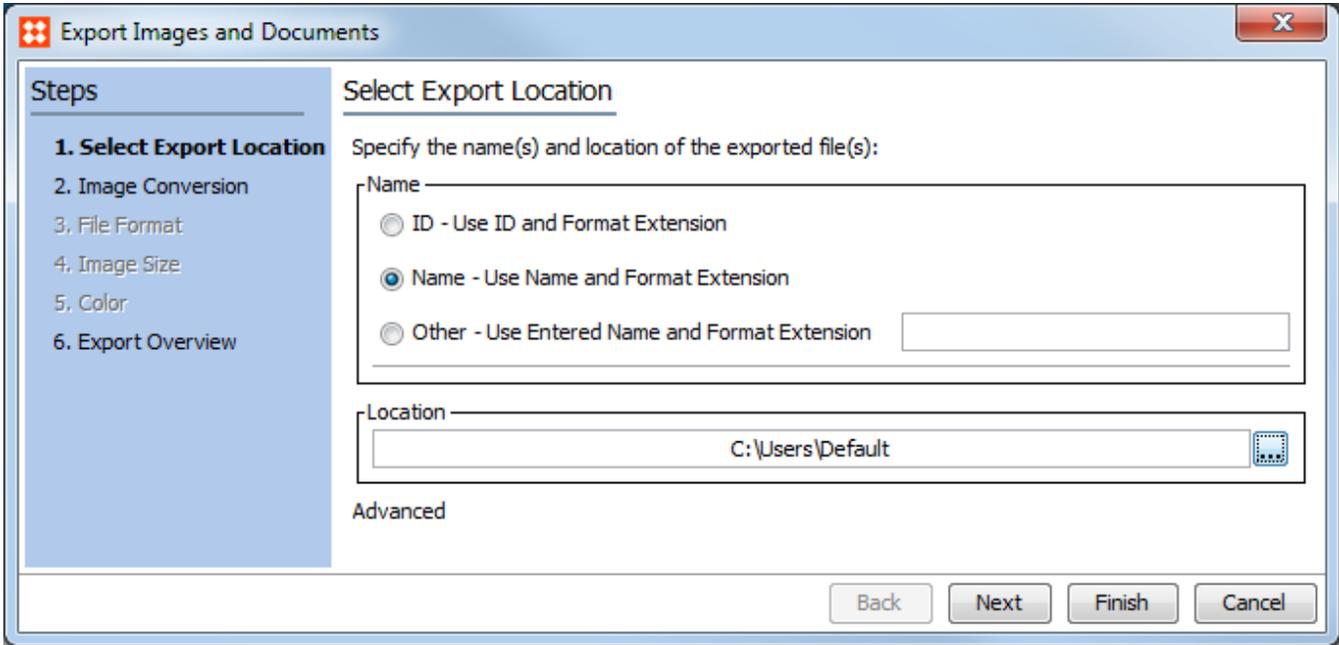


2. Select the 'Name' option, and choose the external folder to export the images to, then click **Next**.

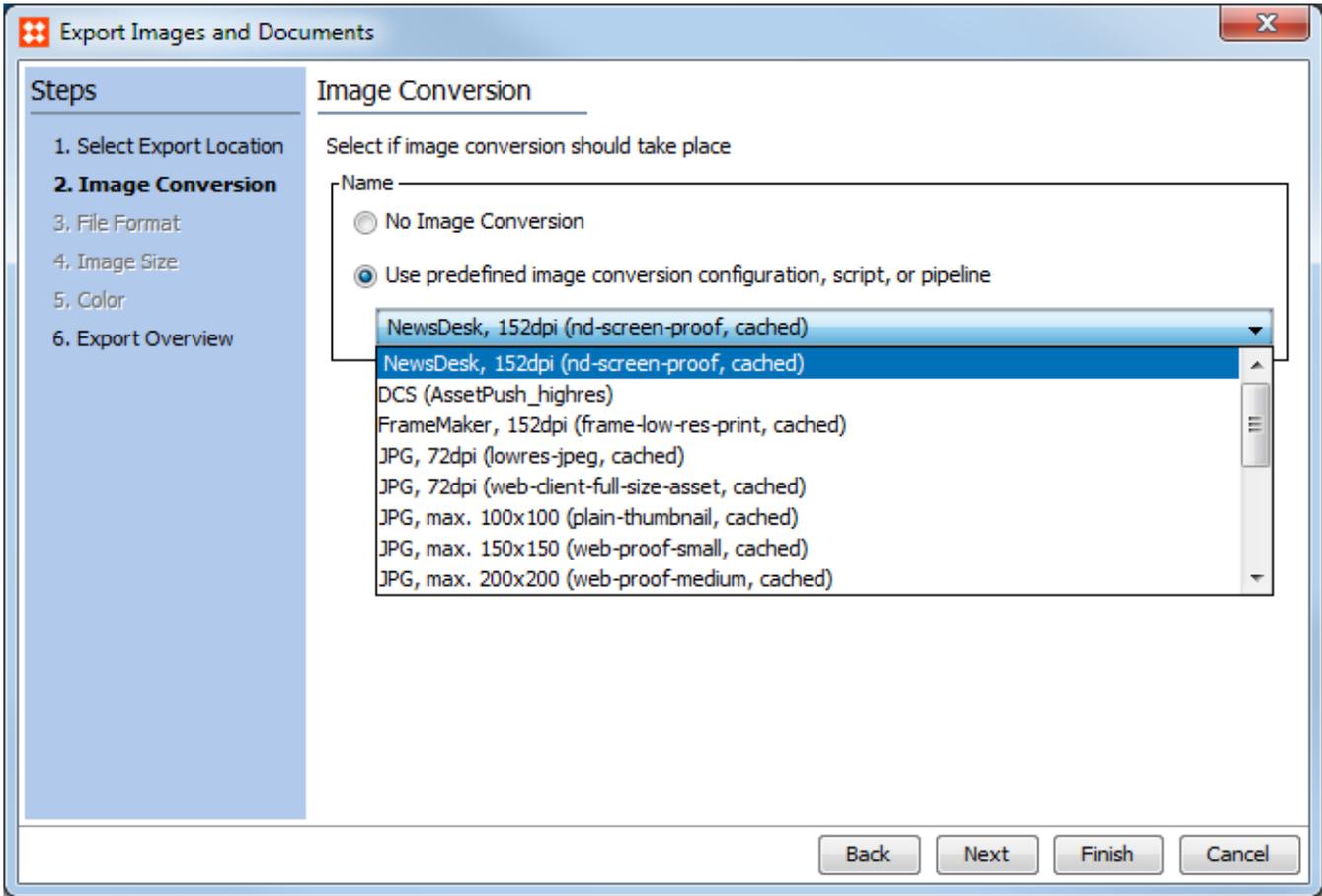
---

**Note:** Optionally, you can select 'ID' for the name of the exported files. If the ID is not an autogenerated ID, this method of export may be more suitable.

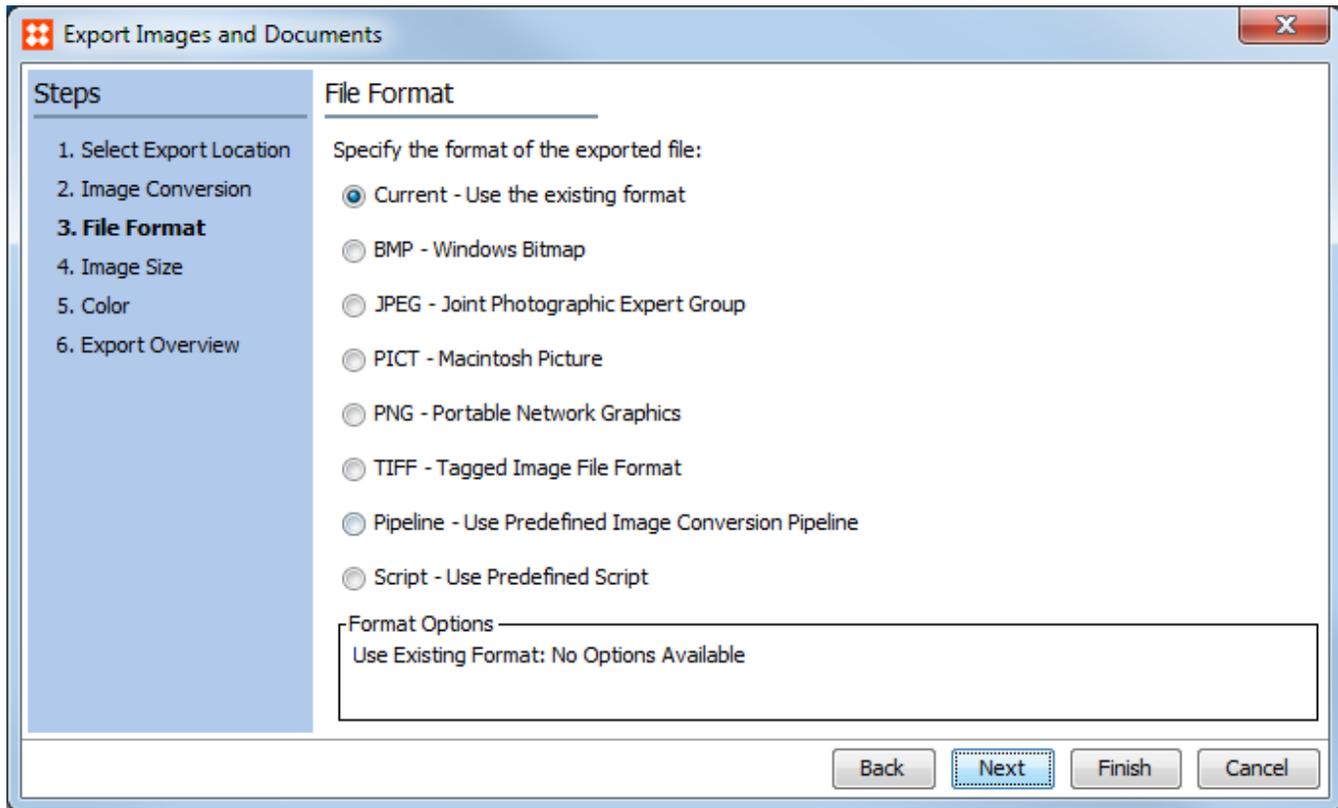
---



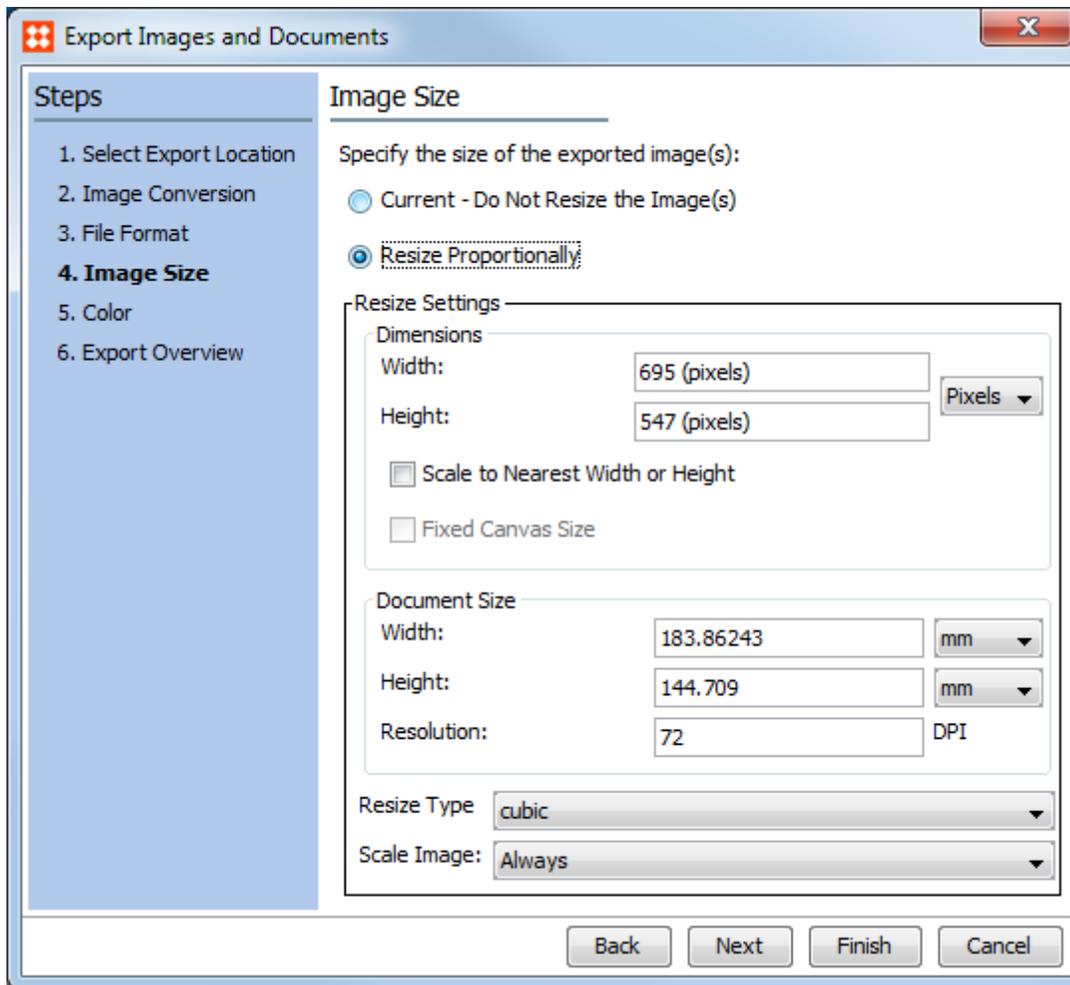
3. Select the file format in which to export the image(s) and select **Next**. If 'Custom' is selected proceed to Step 4, otherwise skip to Step 7.



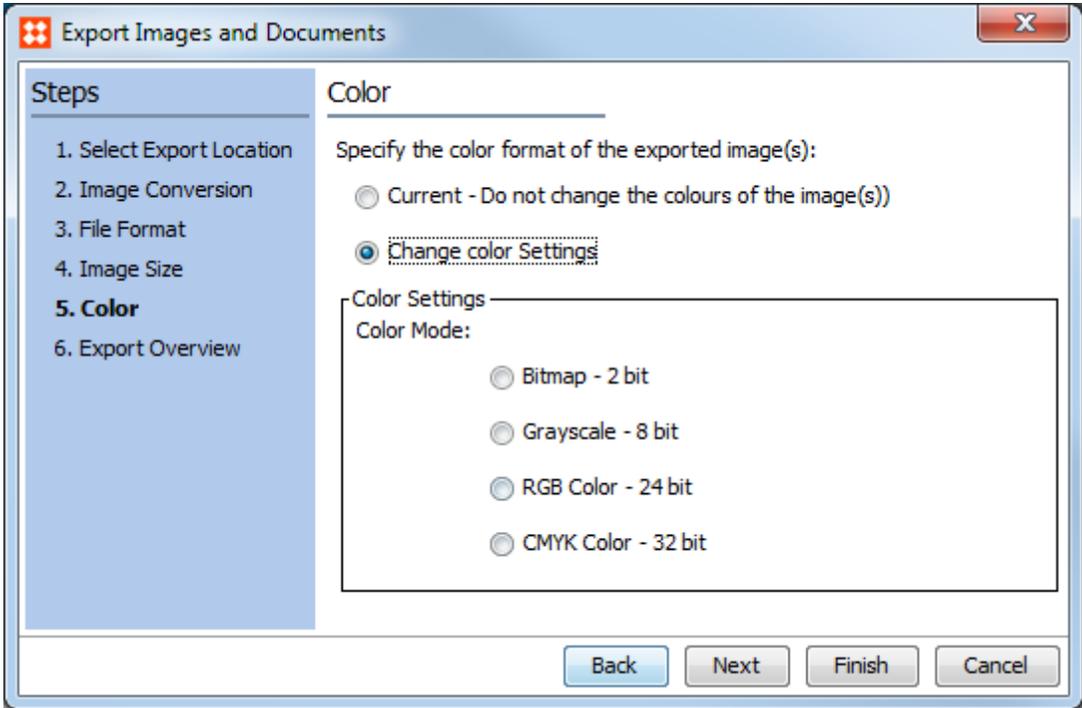
- Specify the format of the converted file by selecting the appropriate radio button, and then click **Next**. The format chosen here will be applied to all the images selected for this export process.



- Choose whether or not to resize the image and select **Next**.

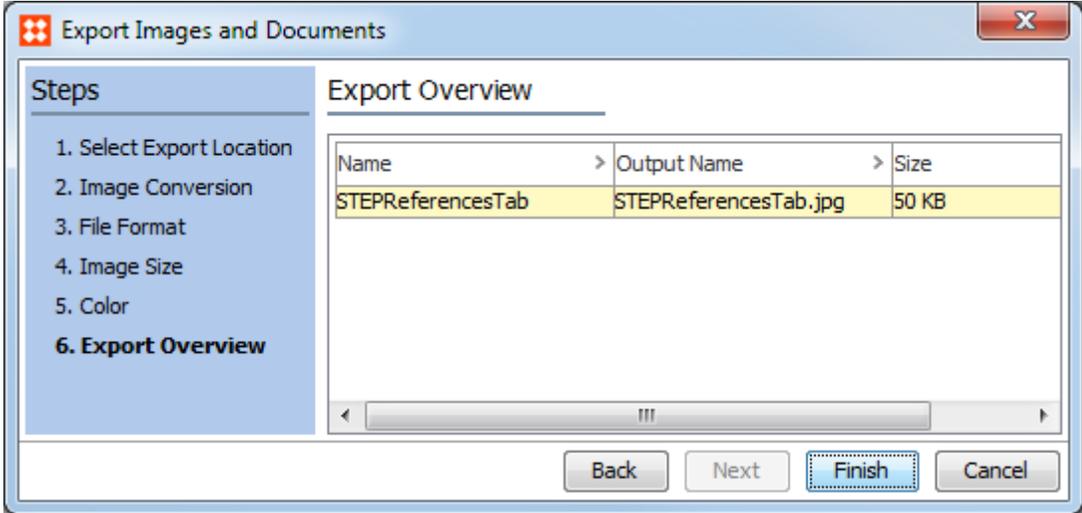


6. Choose whether to change the color settings and click **Next**.



7. Review the overview to make sure the correct images were selected. Then click **Finish**.

A small downloading window will appear showing the number of exported images against the total number to export. Once this is complete, all the selected images will be available in the selected target folder.



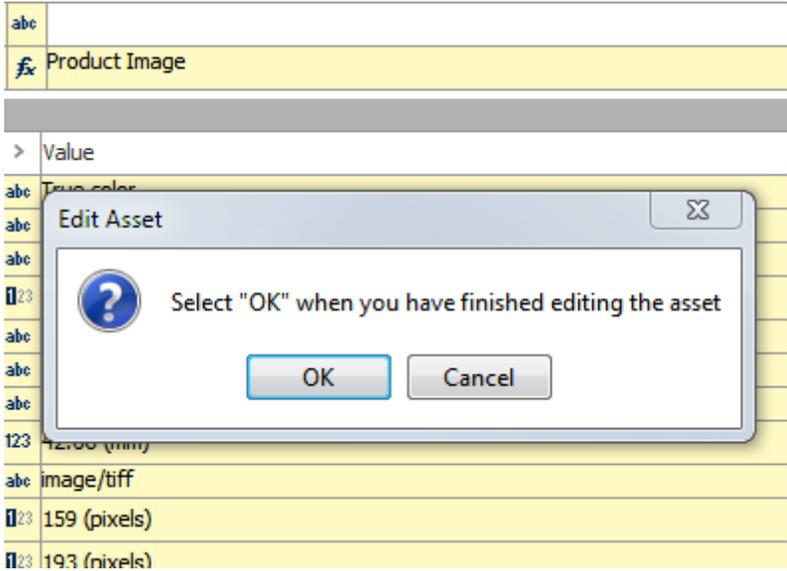
# Editing Assets

Images or documents can be “checked out” from STEP, edited, and saved back. Other users will not be able to edit any images within the same folder at the same time.

- 1. In the **Tree** tab, select the image or document to edit and click on the picture thumbnail. This will produce a message on the thumbnail that says **Go to Image, Image Viewer**. Click on this and it will bring you to the picture in the assets folder still in **Tree**.



- 2. Right-click on the thumbnail and select **Edit Asset**. A small **Edit Asset** window will appear along with the appropriate application program for the selected file. Editing programs will vary.



- 3. Edit the image or document and select **Save** in the program that you just edited the application in.
- 4. Then click **OK** in the Edit Asset pop up window.

---

**Note:** The image or document will open in the application associated with the file type. For example, for files ending with .xls, Excel will automatically be launched. This may be different from computer to computer. One user’s computer may open up EPS images in Photoshop, while another user’s computer may open it in Illustrator. File associations may be changed in a Windows file browser by going to the menu *Tools* → *Folder Options*.

---

# Linking Assets to Products

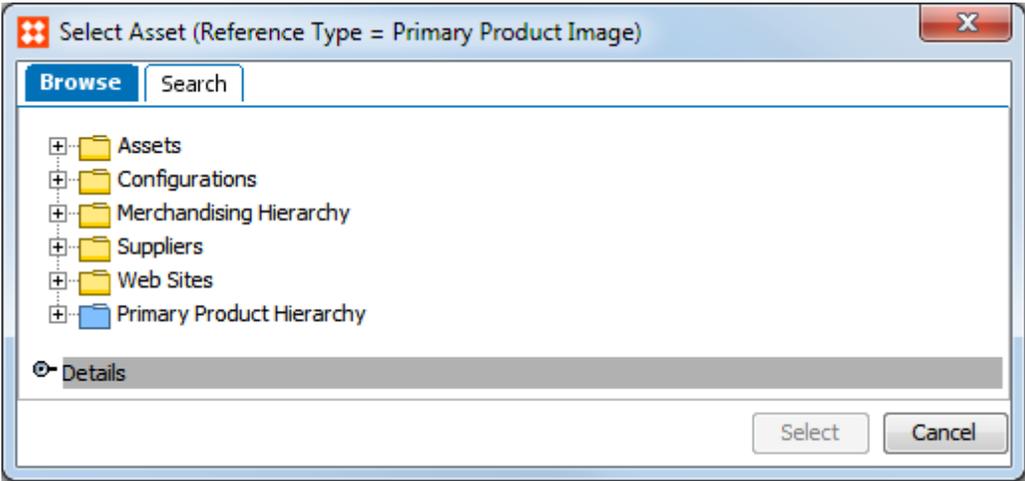
If the asset's name can be matched to the product, then this function can be performed when the asset is imported. If not linked at this time, there are two ways that the interface allows the link to be made: a) from the product or b) from the asset.

## Linking Assets to Products (From Products)

- 1. Select the product and then select the **References** tab. Click on the + symbol to link the image to the correct area. For this example 'Primary Product' will be used as it is the most common reference type made.

Reference Type	Target	Thumbnail
> Brand Name Logo +		
> Illustration +		
> Primary Product ... +		
> Product Image +		
> Video +		

A search window will appear.



- 2. Search for and select the appropriate image. By selecting 'Primary Image,' it denotes that the image is the exact representation of the product. Once a Primary Image has been linked to a product, a thumbnail of the image will appear when the product is selected.

Image References			
Reference Type	Target	Thumbnail	
> Brand Name Logo +			
> Illustration +			
> Primary Product Image +	20805		
> Product Image +			
> Video +			

**Note:** When assets are linked to products, you must designate what type of reference is being made. For example, is it an image that represents the product? Is it an accessory to the product? Or a related document?

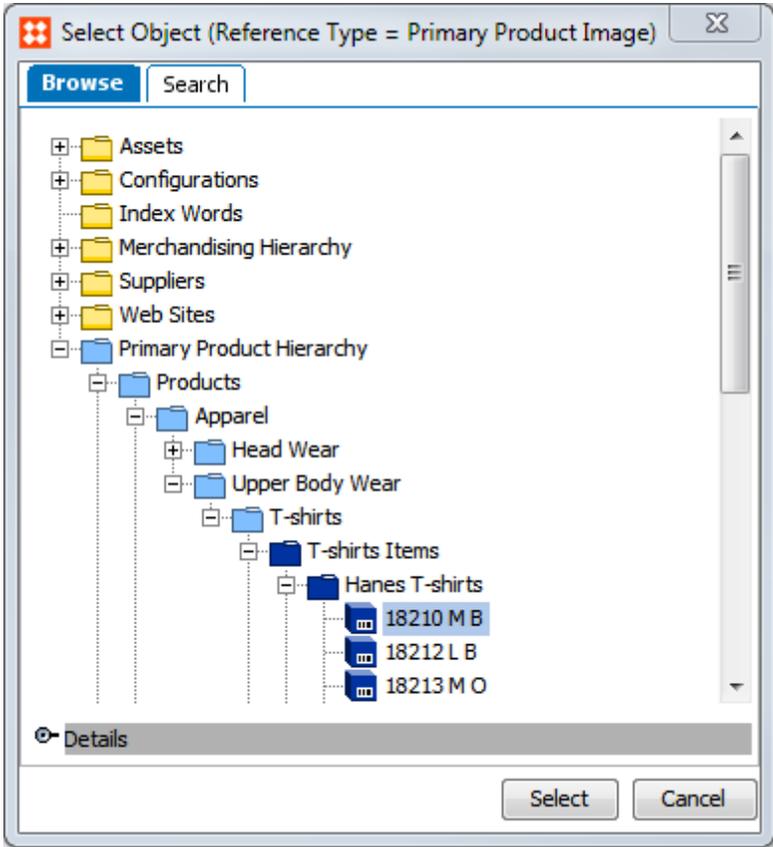
**Note:** This reference type denotes that the image being linked to the product is a direct representation of that product. When you make such a reference, a thumbnail of the image is attached to the product. The thumbnail will only appear for this reference type.

### Linking Assets to Products (From Assets)

Select the image in the Assets folder in the **Tree**. Then select the **References by** tab. If it is not already open, click on the 'Image References' flipper to open it. Click on the + sign for 'Primary Product Image' to link the image to the product.

Images & Documents	References	<b>Referenced By</b>	Status	State Log	Tasks
Image References					
Reference Type	Source	Thumbnail			
> Primary Product ... +					
> Product Image +					
Ungrouped Referenced by Products, Classifications or Entities					
Reference Type	Source				
Used on Page					
Publication	Version	Page	Area Used		

Navigate to the Product in the pop up window, and select it.

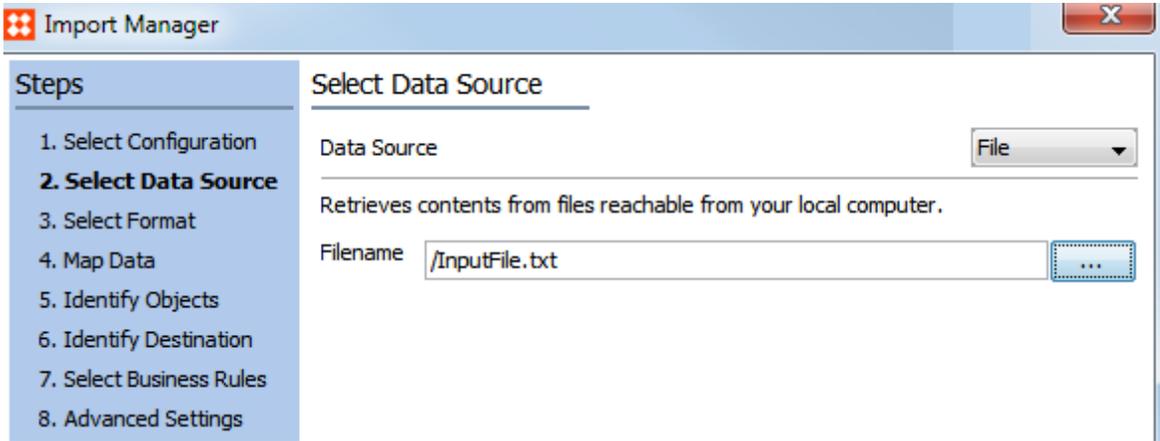


### Linking Assets to Products using the Import Manager

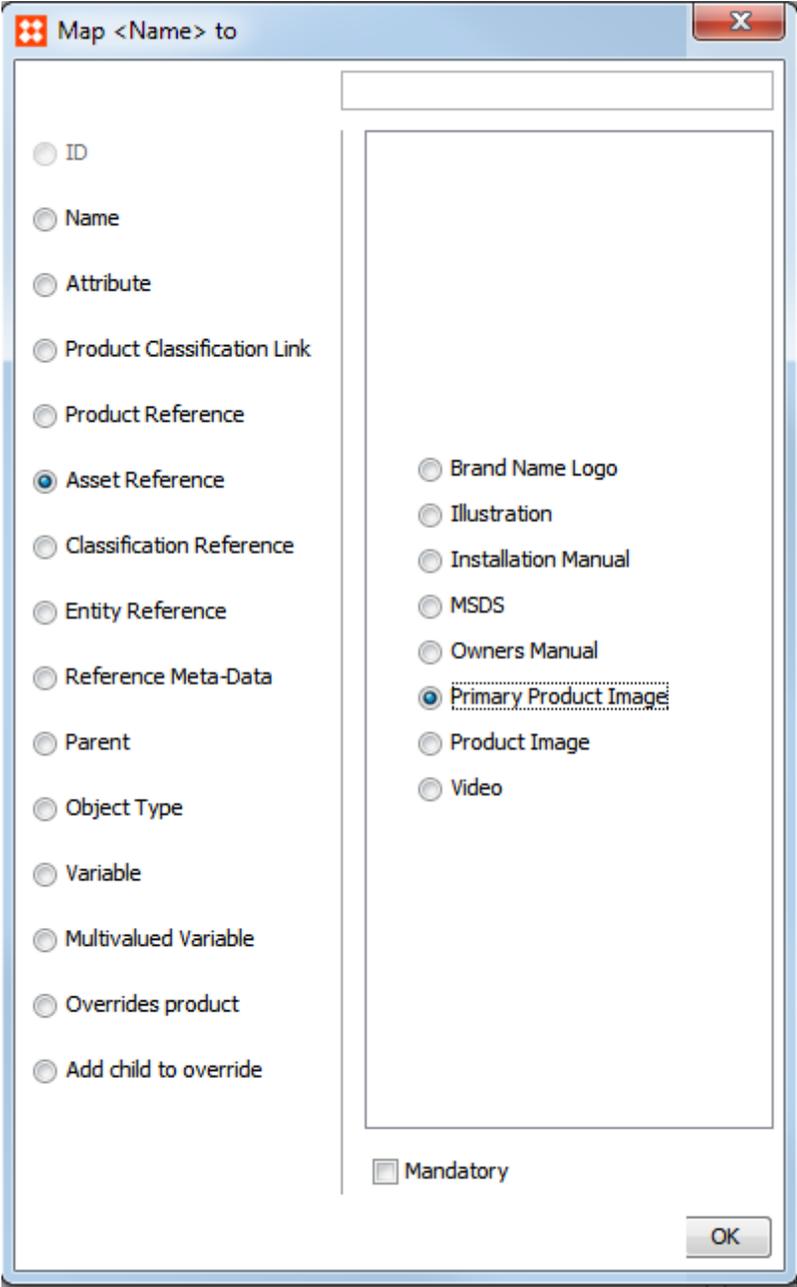
This method is best used for large amounts of products / assets linking. Ideally, you should already have a file in Excel that has the Products and desired Image ID set up according to how you want them to be after import.

**Note:** If you only need to link a few assets to products, then it is more efficient to link them via the interface.

Go to **File** and select **Import**, then **Data**. An 'Import Manager' window will appear. On 'Select Data Sources', click on the breadcrumbs next to 'Filename' and select your file.



Proceed to Step 4 'Map Data'. Make sure to select an entire column and select 'Map'. This will allow you to map column A to 'ID' and map column B to 'Asset Reference'. After selecting 'Asset Reference', select the 'Primary Image' radio button when prompted.



Proceed through the wizard.

If the image IDs were not found or the import was not done correctly, then columns will appear in red.

**Import Manager** [Close]

**Steps**

- 1. Select Configuration
- 2. Select Data Source
- 3. Select Format
- 4. Map Data**
- 5. Identify Objects
- 6. Identify Destination
- 7. Select Business Rules
- 8. Advanced Settings

**Map Data**

Source:

<ID>	>	<Name>	>
18210		18210 M B	
18212		18212 L B	
18213		18213 M O	

Result: Map to: Asset

ID=<ID> ✓	PrimaryProductImage AssetReference=<Name> ⚠
18210	18210 M B
18212	18212 L B
18213	18213 M O

Auto Map    Map    Generate Profile

Back    Next    Finish    Cancel

## Object Approval Overview

This section describes how to approve Objects. Furthermore, it contains a description of the Approved Symbols that are visible in the different Object Editors.

## Approving an Object

Approving Objects is done from the **Maintain** menu by clicking **Approval > Approve Object**.

---

**Note:** If 'approval' is a Task within a Workflow, then Objects can alternately be approved from the **Task** view. See Online Help - Tasks.

---

Approve Objects is available when the **Main** Workspace is selected.

Approving Objects is available for:

- Classifications
- Products
- Images & Documents
- Entities (setup to be Workspace revisable)

The status of an Object in the various Workspaces can be viewed in the **Status** tab in the Workspaces field of the relevant Editor.

Approving an Object is copying the current contents of the Object into the **Approved** Workspace. This is done after the editing is completed, and the Object is ready e.g., for publishing.

Note that:

- Objects must be approved from the **Main** Workspace.
- An Object cannot be approved if parents Objects are not yet approved (approving must be done from the top and downwards in the hierarchy).
- To easily check differences in the **Main** and **Approved** Workspaces, select **Partial Approve**.
- When approving, the Objects revision no. will change automatically.
- An entire hierarchy can be approved using the **Approve Recursively** option. For more information, see 'Approving Recursively' below.
- The user must have sufficient Approve privileges.

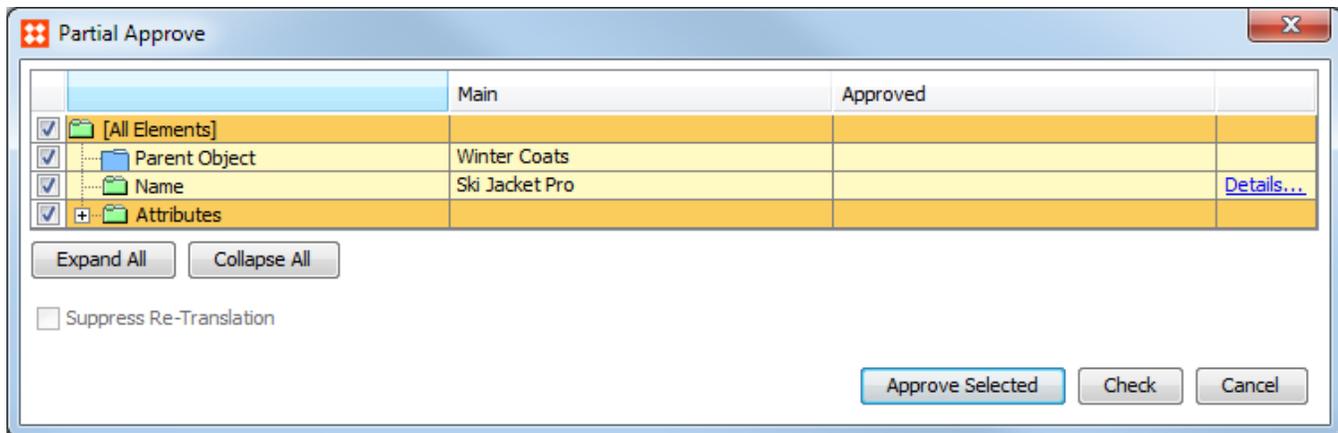
### Partial Approve

It is possible to approve only selected elements of an object, i.e., only some of the attribute values.

To partially approve an object in the **Main** Workspace:

1. In **Tree**, select the object you wish to partially approve.
2. In the **Maintain** menu, click **Approval -> Partial Approve**. Optionally, right-click the selected object and click **Partial Approve**.

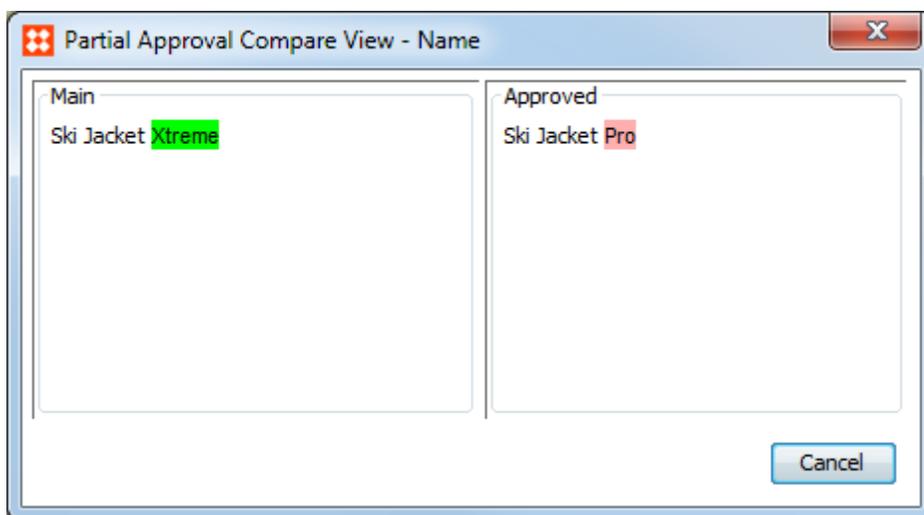
This will bring up the **Partial Approve** dialog box:



The dialog shows which elements of the selected object have been changed since the last approval of the object.

Besides Name, Parent Object and Default DTP Template, the type of elements listed are Attributes, References and Tables. For each element the values in **Main** and **Approved** Workspaces are listed.

To get detailed information about the value for an element, click the **Details...** link. This will bring up a detailed view of the element showing the values for the **Main** and **Approved** Workspace:



In the above example, the value for the attribute Brand Name has changed. Values only present in Main Workspace are marked with a green background color. Values only present in Approve Workspace are marked with a red background color.

---

**Note:** The detailed view differs slightly depending on the element type selected.

---

All elements are selected as default . To unselect all elements, click the check box next to the All Elements node.

You can select the element(s) you wish to approve by clicking the check boxes next to each element. You can also select a whole element group, i.e., **Attributes** by clicking the check box next to the element group.

To expand an element group click the + sign next to the element group. To collapse the element group, click the - sign next to the element group. To expand all elements in the dialog, click the **Expand All** button. To collapse all elements in the dialog, click the **Collapse All** button. To check if the selected elements can be successfully approved, click the Check button. An Approve report will subsequently summarize the result of the check.

Clicking the **Approve Selected** button will approve the selected elements of the object and the **Approve** status of the object will change accordingly. Normal **Privilege** rules apply to **Partial Approve**. For more information, see Action Sets.

### Suppress Re-translation

Normally, an approval of a translated Product in a source language will cause the **Translation** status of the Product to be set to **Re-translation needed**. In the Partial Approval dialog this behavior can be suppressed by clicking the **Suppress Re-translation** check box. All existing translation relations with status 'Up to Date' will remain in status 'Up to Date'. This is especially used in cases where only minor changes are approved and no re-translation is needed. For more information, see About STEP Translation.

---

**Note:** To get a list of language variations of the object that potentially will be affected by the approval, place the cursor on the **Suppress Re-translation** label.

---

## Check Approve

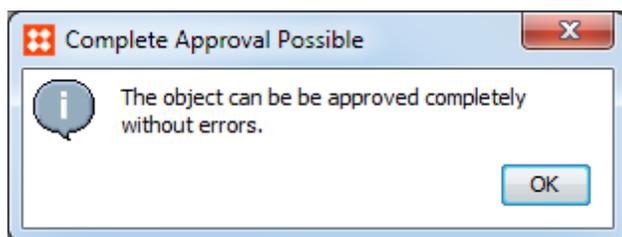
If you are not sure whether or not you are allowed to completely approve an Object, you can run a **Check Approve**.

1. In [Tree], click the Object to be approved.

The Editor shows the Object contents in **Main** and **Approved** Workspaces.

2. In the **Maintain** menu, click **Approval > Check Approve**.

If you only have changed attribute values for which you have the Approve privileges, a **Complete Approval Possible** dialogue box appears.



If you have changed attribute values for which you do not have the Approve privileges the Approval options are unavailable.

## Approving Recursively

Approving Recursively is done from the Object menu by clicking **Approve Recursively**.

Approving Recursively is available when a **Main** Workspace is selected.

Approving Recursively is available for:

- Classifications
- Products
- Images & Documents
- Entities (setup to be workspace revisable)

The status of an Object in the various Workspaces can be viewed in the **History** tab in the Workspaces field of the relevant Editor.

Approving Objects recursively means searching for unapproved Objects linked to (or below) a selected hierarchy node, and approving these Objects (copying them to the **Approved** Workspace).

This is useful and time saving e.g., when a lot of images have been imported and checked and should all be approved.

To recursively approve in the 'Main' Workspace:

1. In [Tree], select the hierarchy containing the Objects to be approved.
2. In the **Maintain** menu, click **Approval > Approve Recursively**.

A dialog box appears, listing the Name of the selected hierarchy node, contained Objects and status of analysis.

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**Note:** Approve Recursively automatically performs a search for unapproved Objects. You can click the **Skip Analysis** button if this is not needed.

---

3. Optionally, type a name for the process.
4. Click **OK** button to start the approve process.

A dialog box appears displaying information on the process.

5. Click **Go to process** button.

The Process view will open showing details of the process and a report of approved Objects.

The hierarchy will now have Approved status indicating that it is copied in the **Approved** Workspace.

## About Approved Symbols

The Approved symbols are used to indicate the status of a Product, Classification, Image or Document. The Approved symbol is viewed by clicking either a Product, Classification, Image or Document.

If you need to approve data, this is typically done in:

- Normal viewing mode - either approve a single object, or you can approve recursively.
- Approved mode - approve all Objects, or you can partial approve Objects (choose specific Values and References to be approved).

## Approved Symbols

An Object can contain revised data or not revised data.

Not revised Objects are:

- Externally maintained Attributes
- Commercial Data

Revised data are:

- Internally maintained Attributes (e.g. Description Attributes and Specification Attributes)
- References between Objects:
  - Product to Image / Document Reference
  - Product to Product Reference
  - Product to Classification
  - Product to Entity
- Classification to Classification
- Classification to Entity
- Image / Document to Entity
- Image / Document to Classification
- Entity to Entity
- Entity to Product

- Entity to Image / Document
  - Entity to Classification
- 
- Object names (e.g. Product names, Images & Documents names and Classification names)
  - STEP PIM Tables
  - Linked Attributes to Product

**Note:** Only the status of revised data are reflected in the Approved field (see the table below for more information).

The Approved field contains one of three different symbols indicating the Approved status of the current Object.

Approved Symbols	Status	Description
	Unapproved	<p>Revised data on Product, Classification or Images &amp; Documents in current context are not approved.</p> <p>Examples can be:</p> <ul style="list-style-type: none"> <li>• An Object has never been approved.</li> <li>• Revised data (e.g. Attribute Values, References, Object names or tables) have been changed in current context without being approved.</li> </ul> <p>Examples of changes to revised data could be:</p> <ul style="list-style-type: none"> <li>• A change in Object name.</li> <li>• A changed value on an internally maintained Attribute.</li> <li>• If an Attribute has been linked to a Product.</li> <li>• If Reference links to Objects have been made.</li> </ul> <hr/> <p><b>Note:</b> When linking a Product to Classification and in case the Classification Object Type owns the Product links, then the Product does not get the Unapproved symbol. For more information, see Online Help - Object Types &amp; Structures.</p> <hr/> <p>Privileges can have an influence on the Approved symbols. See 'Users with Different Privileges' below.</p>
	Approved	<p>Revised data on Product, Classification or Images &amp; Documents are approved in all contexts.</p> <hr/> <p><b>Note:</b> No data in current context or any contexts are to be approved.</p>
	Partial	<p>The yellow Partial Approved symbol can appear if:</p>

Approved Symbols	Status	Description
	Approved	<p>Revised data have been approved in current context but a Reference, Object name, or Value need also to be approved for the Object to get approved in all contexts.</p> <p>If you change view to another context, then you typically see that:</p> <ul style="list-style-type: none"> <li>• A dimension dependent Reference is not approved.</li> <li>• A dimension dependent Value is not approved.</li> <li>• A dimension dependent Object name is not approved.</li> </ul> <hr/> <p><b>Note: When</b> all the dimension dependent References, Attribute values and Object names have been approved, then the symbol will change from yellow Partial Approved symbol to a green Approved symbol.</p> <hr/> <p>Privileges can have an influence on the Approved symbols. See 'Users with Different Privileges' below.</p>

## Users with Different Privileges

If two users have different **View** privileges, then they might get two different Approved symbols when looking at an Approved Object.

Example with Attribute can be:

- User 1 has the privileges to see all Attributes
- User 2 has limited privileges and can only see some of the Attributes

If changes are made to the Attributes that only User 1 can see, then User 1 gets the Unapproved symbol, while User 2 only gets the yellow Partial Approved symbol as no changes has been made to the Objects he can see.

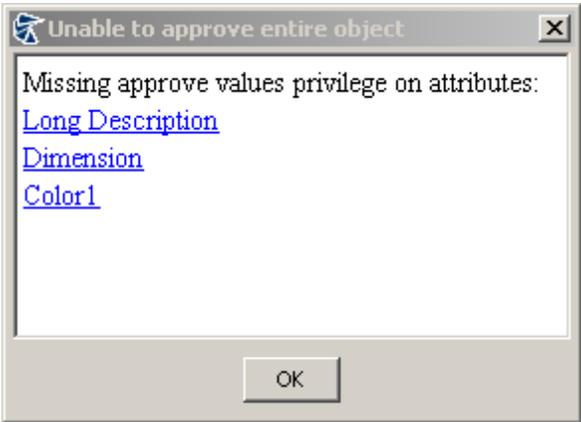
If changes are made to Attributes that both User 1 and User 2 have the privileges to see, then both users get the Unapproved symbol.

## Approval Feedback

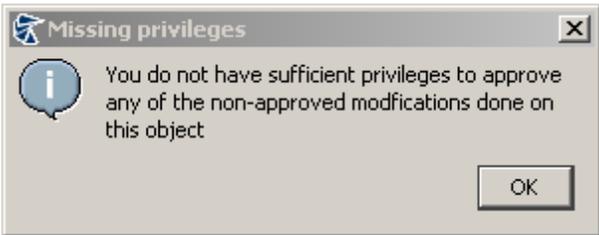
Depending on your **Approve** Privileges, you might get different types of warnings, when clicking **Approve Object** **Partial Approve**.

### Approve Object Feedback

If you have modified attribute values for which you have **Approve Privileges**, and at the same time you have modified attribute values for which you do *not* have **Approve Privileges**, an **Unable to approve entire object** dialog appears.

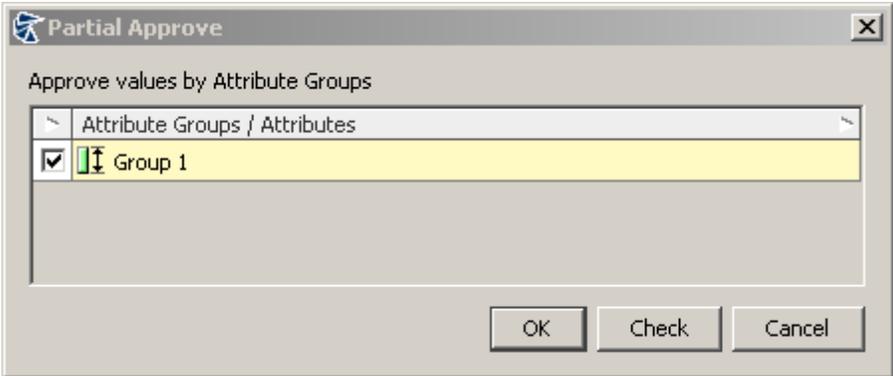


If you have modified attributes values, for which you do *not* have **Approve Privileges**, a **Missing privileges** dialog appears.



**Partial Approve Feedback**

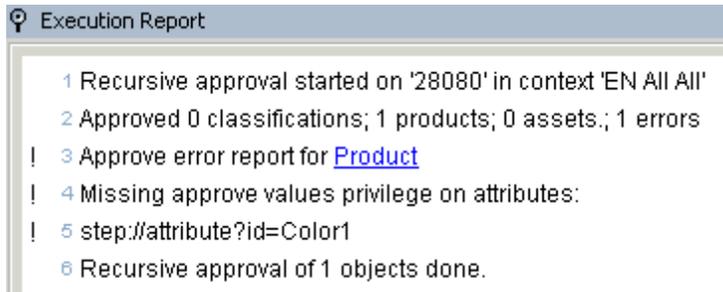
If you have modified attribute values for which you have **Approve Privileges**, and at the same time you have modified attribute values for which you do *not* have **Approve Privileges**, a **Partial Approve** dialogue box appears.



In the example above, the user will be able to approve all attribute values in Attribute Group **Group 1**.

## Approve Recursively Feedback

1. In [Background Processes], click **Approve Recursively**, unfold **Active** or **Ended** Processes, click the relevant process.
2. In the **Background Process** tab, unfold **Execution Report**.



```
Execution Report
1 Recursive approval started on '28080' in context 'EN All All'
2 Approved 0 classifications; 1 products; 0 assets.; 1 errors
! 3 Approve error report for Product
! 4 Missing approve values privilege on attributes:
! 5 step://attribute?id=Color1
6 Recursive approval of 1 objects done.
```

## STEP Keyboard Shortcut

Within STEP Workbench there are many shortcut key combinations that allow users to quickly navigate and make changes through the system. The following tables list and describe the options available for Shortcut Key options.

### Basic Shortcuts

Shortcut	Description	Shortcut Key
Copy	Creates a duplicate of the information selected that can be pasted somewhere else.	Ctrl + C
Cut	Takes away information that can be pasted into a different location if desired.	Ctrl + X
Duplicate	This duplicates the item selected, with the option to duplicate references as well.	Ctrl + J
Goto	This brings the user to the Goto field in the upper right hand corner of the workbench screen where items are looked up.	Ctrl + G
Goto Next	Finds the next item that most closely matches what the user is looking for. The results may differ depending on what tab the user is in and working with, or what area is selected as active.	Ctrl + E
Help	When Workbench is open, it will populate another window that provides all of the Online Help Documentation.	F1
Paste	When information that was either cut or copied from before is placed into an alternate area.	Ctrl + V
Redo	Goes to the changed state, if the change was reversed.	Ctrl + Shift + Z
Reload	Reloads the workbench and updates to any changes made.	F5
Select All	When the desired area is clicked in or is already the active area, pressing this key combination will choose everything in this particular area.	Ctrl + A
Undo	Goes back to the original state before the change was made.	Ctrl + Z

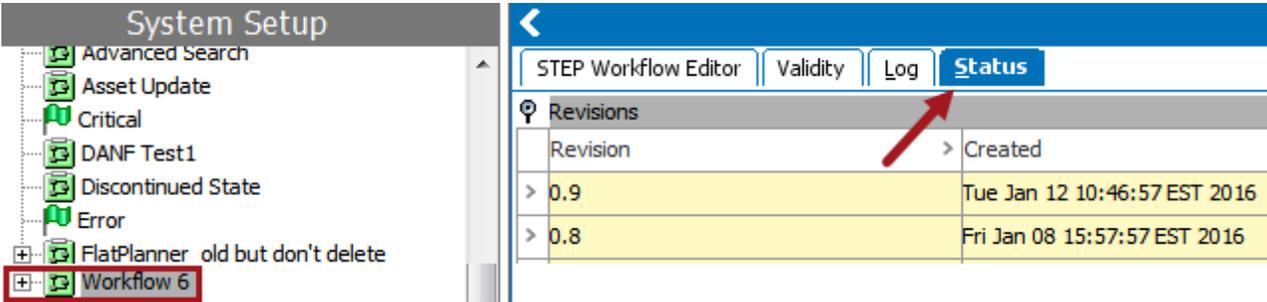
### Navigate to Main Side Bar Tabs in Workbench

Shortcut	Description	Shortcut Key
Background Process Tab	Unless a product is being viewed, this will bring the user to the Background Processes tab. If a user is on a product, this key combination will not transpire.	Alt + P
Bookmarks	Brings the user to the Bookmarks side tab.	Alt + M
System Setup Tab	Brings the user to the System Setup tab.	Alt + Y
Search Tab	Leaves the user looking at what they were on in the main frame, but brings up the Search Tab along the left hand side.	Ctrl + F
Tree Tab	This will bring a user to the Tree Tab only if not viewing an item in Tree in the main screen, or having an item still show up in the main screen even though navigation has been away from it.	Alt + T
Workflow Tab	Navigates to the STEP Workflows tab.	Alt + W

### Navigate to Horizontal Tabs within Main Sidebar Tabs

To navigate to the horizontal tabs within the main tabs in workbench, press Alt + (the letter underlined on the tab).

For example, if a workflow is selected within System Setup, pressing **Alt + S** displays the **Status** tab for the workflow being viewed because 'S' is the underlined letter for the Status tab.



Note that options for shortcut keys to horizontal tabs vary depending on what item is selected and in what main tab a user is located (Tree, Search, Background Processes, System Setup, Bookmarks, and STEP Workflow). Not all tabs have underlined letters for shortcut key options.

## General Shortcuts Useful in Workbench

Shortcut	Description	Shortcut Key
Add Bookmark	When on an object and this is pressed, it will add the item to the bookmark list on the Bookmark tab.	Ctrl + D
Add Element	When adding various elements, pressing this key combination will often (not in all cases), bring up a dialogue window allowing the user to add to the desired list.	Ctrl + Plus
Approve Object	When in Main, approves an object that was previously unapproved.	Ctrl + Shift + J
Mark Different (On multi-product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, selecting this key combination will mark all areas that are different green.	Shift + F12
New PIM Window	With STEP Workbench open, this will open an additional STEP Workbench window.	Ctrl + N
Remove Element	When deleting various elements from lists or rows, pressing this key combination will often remove the desired connection or item.	Ctrl + Minus
Rotate Table (On Multi-Product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, this rotates the table view if the table is the active area.	Shift + F11
Toggle attribute values selection between blinking cursor and blue filter	When on a field that is editable, selecting F2 allows the user to write in the field. When pressed again, the entire field turns blue, rendering it entered and non-editable, unless F2 is pressed again or the field is clicked into again.	F2

## Insert Options

Shortcut	Description	Shortcut Key
Insert Action Set	In System Setup, when in the Action Sets, pressing this key	Ctrl + Shift

Shortcut	Description	Shortcut Key
	combination will create a child Action in an Action set.	+ S
Insert Asset	The Create Asset dialogue appears when in Tree.	Ctrl + Shift + A
Insert Attribute	Displays the Create Attribute dialogue in System Setup.	Ctrl + Shift + T
Insert Attribute Group	In System Setup, this creates a new Attribute Group if sitting on the proper level.	Ctrl + Shift + I
Insert Background Process to Monitor Deadlines / STEP Workflow Deadline Monitoring	This allows a user to set up a background process to monitor states with exceeded deadlines in the desired time frame.	Ctrl + Shift + D
Insert Character Tag	When typing in a field and this is selected, a dialogue appears allowing the user to select from character tags.	Ctrl + R
Insert Classification	In Tree, this inserts a new yellow folder, or classification.	Ctrl + Shift + C
Insert Classification Root	In Tree, a new Classification Root or top node yellow folder is created.	Ctrl + Shift + R
Insert Dimension	In System Setup, when sitting on the top node for contexts, clicking these keys will bring up the dialogue to create a new dimension.	Ctrl + Shift + D
Insert Dimension Point	In System Setup, when on a dimension, selecting this will create the dimension point.	Ctrl + Shift + M
Insert Group	In System Setup, when on the node that houses Users and Groups, selecting this key combination will create a new group.	Ctrl + Shift + G
Insert List of Values	In System Setup, when sitting on the top node for List of	Ctrl + Shift

Shortcut	Description	Shortcut Key
	Values, pressing this will bring up the dialogue to create a new List of Values.	+ L
Insert Orphan Attribute	When on a product, this will insert an orphan Attribute, which will appear in italics.	Ctrl + Shift + O
Insert Product	When in Tree, this will create a new object under the one selected.	Ctrl + Shift + P
Insert Special Character	When in a field that allows typing, selecting this brings up a list of characters that can be selected and inserted into the field.	Ctrl + Shift + E
Insert STEP Workflow	In System Setup, when on the top node for workflows, or when inside the node for workflows, selecting this will bring up a new STEP Workflow Designer window to create a new workflow.	Ctrl + Shift + R
Insert Workspace	In System Setup, when on a workspace, selecting this key combination will create a different workspace.	Ctrl + Shift + W

## Linking Options

Shortcut	Description	Shortcut Key
Link Asset	When on References or References By tab, this allows asset links or references to be selected and put into the appropriate folders. Note that the Reference Type can be changed from the drop-down menu in the dialogue that appears.	Ctrl + Shift + F
Link Attribute to Classification	To link an Attribute to an item, select the item that needs the attribute and select this key combination. Linked attributes will appear in the References tab under the 'Attributes' flipper.	Ctrl + Shift + Y
Link Attribute to Product	When on a product, selecting this key combination links an attribute to a product.	Ctrl + Shift + K

Shortcut	Description	Shortcut Key
Link Classification to a Product	This links a classification to a product. It can be seen under the Reference tab under the 'Linked Attributes to Classifications Hierarchy' flipper.	Ctrl + Shift + H
Paste Link	Creates a new reference (pointer or link) to an existing / copied object. An example would be if the user copied a SKU from a blue folder and pasted it into the yellow folders. Note that object types need to be compatible.	Ctrl + L
Link Product / Create Link	When on References or References By tab, this allows product links or references to be selected and put into the appropriate folders.	Ctrl + Shift + Q

## Style Options

Shortcut	Description	Shortcut Key
Bold	When typing in a field, this activates bold text.	Ctrl + B
Italic	When typing in a field, this activates italic text.	Ctrl + I
Other Style	This key combination can be pressed to bring up the Style box, where there are a number of styles to choose from.	Ctrl + Y
Rich Text Editor	Opens the Rich Text Editor in the STEP Workbench when editing an attribute value.	Alt + F2
Paste and Match Style	When in a field, if 'text A' is copied from one area and is going to be pasted into 'text B' that is a different style, pressing this key combination will make it so the copied 'text A' will past into 'text B' with the style of 'text B'.	Ctrl + Shift + V

## Flatplanner Shortcuts

Shortcut	Description	Shortcut Key
Save (In Flatplanner)	This save what is being worked on.	Ctrl + Alt + S
Zoom In (In Flatplanner)	This zooms in on what is being worked on.	Ctrl + Plus
Zoom Out (In Flatplanner)	This zooms out of what is being worked on.	Ctrl + Minus