

# **STEP WEB UI SETUP AND USER GUIDE**

The logo for StiboSystems, featuring the word "StiboSystems" in a white, sans-serif font. The letter "i" in "Stibo" has a small crown-like symbol above it. The logo is positioned on the left side of the page, within a large orange triangle that points to the right.

**StiboSystems**

STEP Trailblazer

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## Web User Interfaces Introduction

Web UI is an interface to STEP and provides an easy-to-use, intuitive way to work with data in the system.

The Web User Interfaces documentation will guide you through the prerequisites and basic set-up procedures needed to implement a Web UI. You will also find additional information about Web UI components, how to configure the components, and recommendations for using them.

After reading the documentation, Web UI designers (admins) and end users will have a better understanding of all the functionality available through Web UI.

# Web UI Getting Started

There are some prerequisites to Web UI configuration / usage.

## Required System Properties

On the application server, the `config.properties` file (or `sharedconfig.properties` file if running servers in cluster) must have the property **Portal.Theme.Root** set.

The property should point to the directory containing the style sheet(s) used by the STEP Web UIs. The default directory for this is `/step/config-examples/portal/theme/default`.

Example on a Linux server:

```
Portal.Theme.Root=/home/stibosw/step/config-examples/portal/theme/default
```

Example on a Windows server:

```
Portal.Theme.Root=E:/step/config-examples/portal/theme/default
```

## Privileges

Web UI configurations will, by default, not be user / user group specific. That is, apart from the fact that the standard privilege setup can influence what a user sees / is able to do, the Web UI will be the same for all users logging in.

Users need privileges to be able to access and use Web UI. Different privileges can be set up for different users and user groups depending on the users' roles. As an example, if a user will maintain Web UI configurations in an admin role, the user will need the proper privileges to access Web UI Designer. Or, if an end user will be using workflows or viewing / maintaining objects, then there are separate privileges for these tasks.

To follow any of the steps in the Web User Interfaces documentation, the proper privileges have to be granted (e.g., you cannot create a new Web UI unless you have the privilege to do so). For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

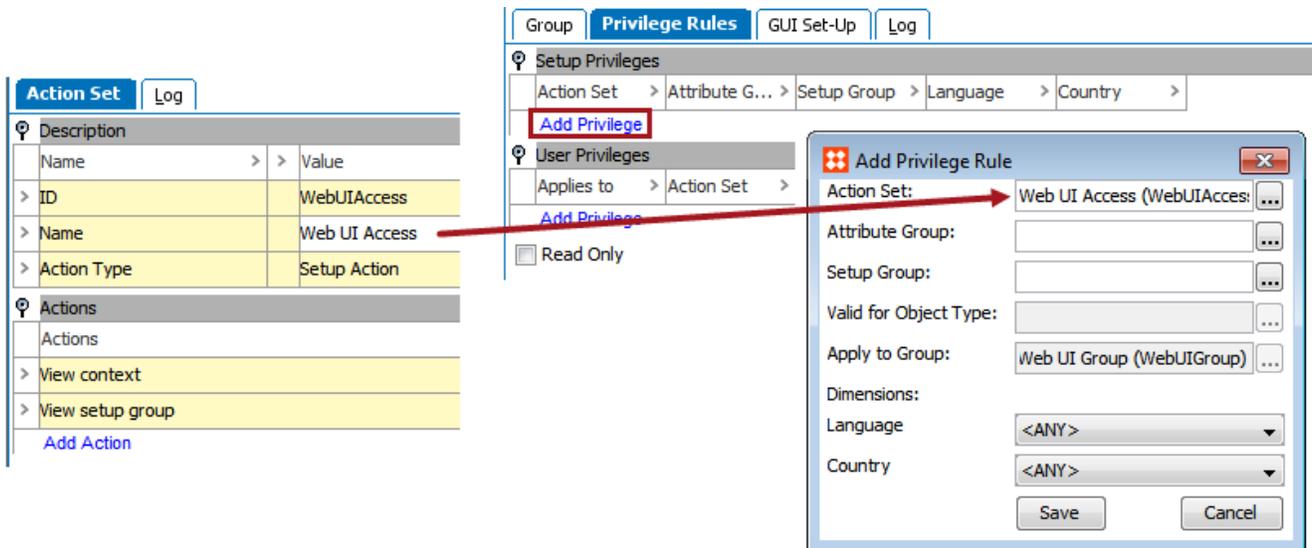
## Web UI Access Privileges

At a minimum, the actions 'View context' and 'View setup group' must be added to a user group's privileges before a user is able to log in to a STEP Web UI. If these actions do not already exist as a stand-alone item or as part of an existing Action Set, then they need to be set up.

Here are the steps for creating an Action Set and applying it to a User Group.

1. Go to **System Setup** in the STEP Workbench.
2. Under **Action Sets**, right-click **Setup Actions** and add a New Action Set.
3. Type in an ID and Name then click Create. In this example, the name is 'Web UI Access.'
4. Click on the new action set that was just created (Web UI Access) and go to the Action Set tab.

5. Click on the Add Action link and select 'View context' then click Select.
6. Click on the Add Action link and select 'View setup group' then click Select.
7. Go to the **User & Groups** section of **System Setup** and click on the user group that needs Web UI access.
8. On the Privilege Rules tab, click the Add Privilege link under the Setup Privileges flipper.
9. In the 'Add Privilege Rule' dialog box, click the ellipsis next to the Action Set field and choose the Action Set you just created (Action Sets > Setup Actions > Web UI Access). Then, click Select.
10. Click Save.



For admin users who will be using the Web UI Designer, see the **Designer Access** section of the **Web User Interfaces** documentation.

## Creating a New Web UI

A STEP Web UI is defined in an XML file placed in STEP. This XML file is called a Web UI configuration. Web UI configurations are listed in the STEP Workbench in **System Setup** below a specified setup group. New STEP installations are pre-configured with this setup group, which can be renamed by the user.

If using a system that does not have this setup group configured, one can be easily created by following the instructions found in the **Setup Groups** section of the **System Setup / STEP Super User** documentation.

A number of Web UI templates are available so that creating a Web UI from scratch is not necessary. The type of data you have may also impact what template you use. It is important to note that the templates are simply example configurations and, typically, elements from one template can easily be integrated in another template.

See the **Web User Interfaces / Sample Web UIs** documentation for more information on these Web UI templates:

- User Web UI
- Supplier Web UI
- Customer Data Web UI
- Asset Web UI
- Publishing Web UI

Users can also choose to duplicate an existing Web UI, and the steps are outlined later in this topic. Once a new Web UI is created from a template or duplicated from another Web UI, it can be modified and customized to meet business needs.

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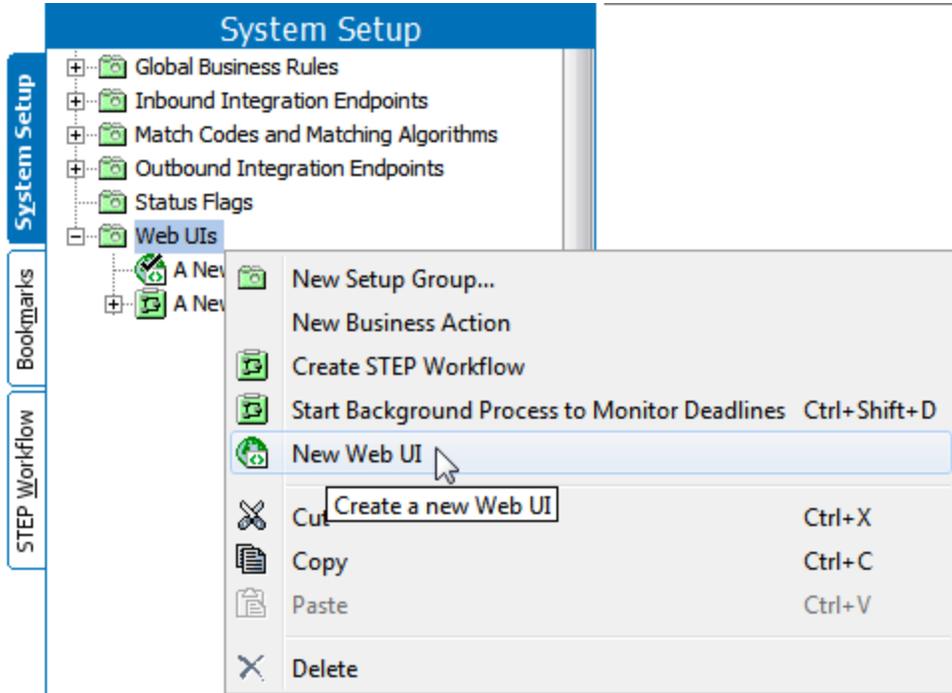
**Important:** Before moving ahead, a crucial starting point to developing a new Web UI is the initial analysis of the requirements and purpose of the Web UI (e.g., how will it be used, what kind of data should be displayed, should data be editable, etc.). Once the use case and any data analysis is done, it is time to move ahead with creating and configuring a Web UI.

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## Creating a Web UI from a Template

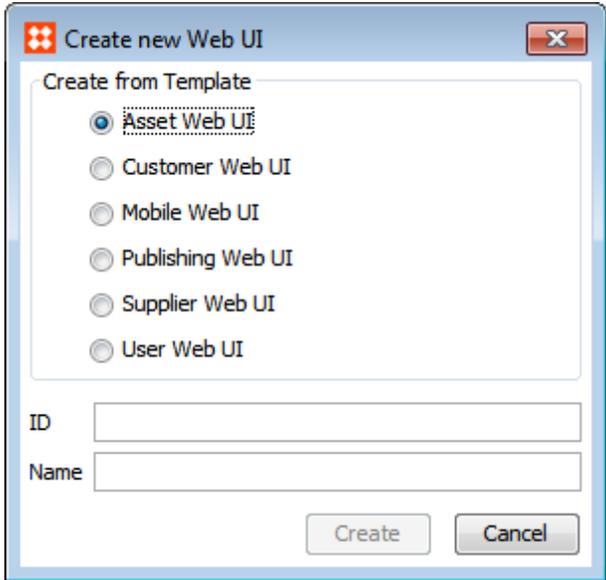
To create a new STEP Web UI:

1. In **STEP Workbench** go to the **System Setup** tab and right-click the setup group that is designated as the parent folder for Web UI configurations. Select **New Web UI**. (If the New Web UI option is not showing, make sure you are using the correct setup group folder.)



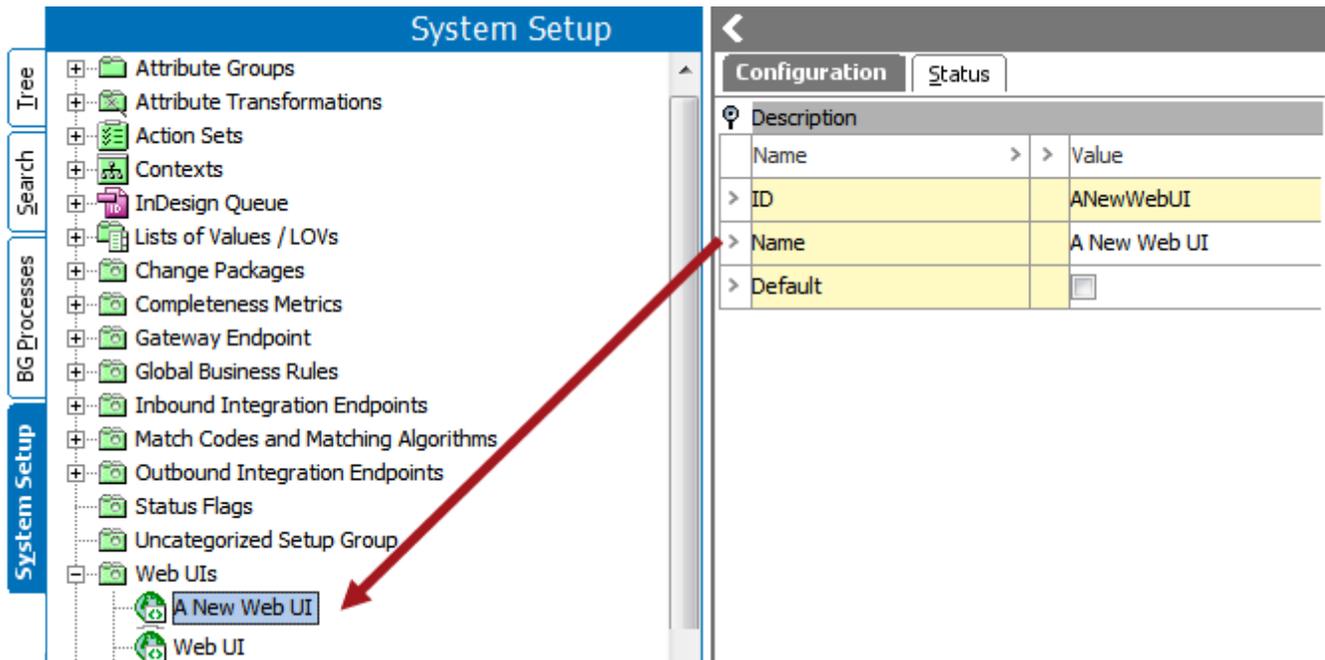
- 2. In the **Create new Web UI** dialog, select the preferred template.
- 3. Enter an **ID** and a **Name** for the configuration, and then click **Create**.

**Important:** Do not use spaces or special characters in the ID since the ID is used as part of the URL for accessing the Web UI. The name is used as a display name within the STEP Workbench and on the STEP webstart page. The ID becomes the Web UI configuration ID referenced in various sections of the **Web User Interfaces** documentation.



A Web UI configuration, based on the selected template, is now created in STEP and will appear by name under the setup group folder.

The Web UI is available for configuration editing (e.g., Web UI name and default status) in System Setup and available to access using a browser.



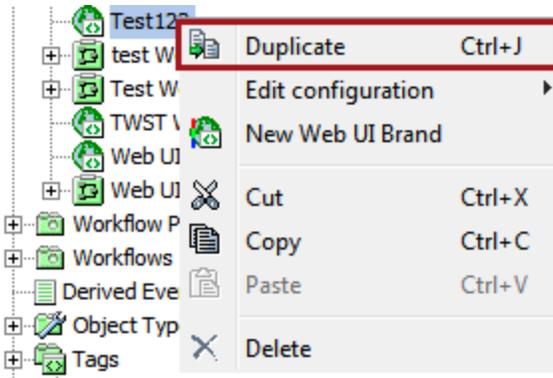
If **Default** is enabled / checked on the Configuration tab, the Web UI can be accessed via a simpler URL (no Web UI configuration ID required) than what is used for non-default Web UIs. For more information, see the **Accessing a Web UI** section of the **Web User Interfaces / Web UI Getting Started** documentation.

**Note:** Setting a default is not required. If using this feature, only one Web UI at a time can be set as the default. The Default checkbox for a specific Web UI cannot be unchecked once it has been enabled, but users can change the default selection by enabling the value for another Web UI.

## Duplicating an Existing Web UI

Instead of creating a new Web UI from a STEP template, it may be ideal to duplicate an existing Web UI. In many cases, this will make the creation of a similar Web UI easier since much of the configuration has probably already been done.

1. In the workbench go to **System Setup** and expand the Setup Group that contains Web UI configurations.
2. Right-click the Web UI configuration you wish to duplicate.



3. Select **Duplicate** from the menu.
4. When the 'Duplicate' dialog appears, enter an **ID**. The **Name** is pre-populated, which can be edited or a new name can be entered. Click **OK** when finished.

A Web UI configuration, duplicated from an existing Web UI configuration, is now created in STEP and will appear by name under the setup group folder. The Web UI is available for configuration editing as described at the end of the **Creating a Web UI from a Template** section of this document.

For details about working with Web UI revisions and deleting a Web UI configuration, see the **Managing Web UI Configurations** section in the **Web User Interfaces / Web UI Getting Started** documentation.

For information on how to use the Web UI Designer, see the following topics in the **Web User Interfaces** documentation:

- Managing Web UI Configurations
- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- Web UI Designer Reference Guide

# Accessing a Web UI

Web UI users, regardless of their role (e.g., admin or end user), must have Web UI access privileges. For more information on setting privileges up, see the **Web UI Getting Started** section of the **Web User Interfaces** documentation.

Once the proper privileges are set up, there are two ways for users to access a Web UI.

## Direct Browser Access

Privileged users can access a Web UI by opening a browser and entering the relevant URL. A Web UI URL is basically the URL that is used to access STEP Workbench but appended with **/webui**.

If the Web UI you are accessing is not enabled as the Default Web UI, the URL must also be appended to include the ID of the Web UI configuration.

Default URL Format	Non-Default URL Format
http://[your system name]/webui	http://[your system name]/webui/[Web UI configuration ID]

As a basic example, here is what the URLs will look like for a Web UI configuration where the system name (server URL) is 'your-system' and the Web UI configuration ID is 'ANewWebUI.'

Example Default URL Format	Example Non-Default URL Format
http://your-system/webui	http://your-system/webui/ANewWebUI

Once the URL is entered into a browser address bar, a login screen displays. The screen will display the Web UI type (based on the template format selected when the Web UI was created).

### STEP User Portal



To access the Web UI homepage:

1. Enter STEP Username
2. Enter STEP Password
3. Click Login

## Launch Button Access

The STEP webstart page can be configured to display a launch button for all Web UIs created in STEP. Clicking the applicable launch button will open your default browser and navigate you directly to the Web UI URL.

---

### Launch Web UI



In the **config.properties** file (or **sharedconfig.properties** file if running servers in cluster) the **Webstart.Portal.ShowAll** setting must be equal to true. If **Webstart.Portal.ShowAll** is equal to false, then users will not see any Web UI launch buttons and will need to use the **Direct Browser Access** directions outlined in the previous section.

```
#=====
# Portal Settings
#=====
Webstart.Portal.ShowAll=true
```

Read more about **Creating a New Web UI** in the **Web User Interfaces / Web UI Getting Started** documentation.

For details about **Managing Web UI Configurations** (reverting to previous versions or removing a Web UI configuration revision from the revision history), see the **Web User Interfaces / Web UI Getting Started** documentation.

For information on how to use the Web UI Designer, see the following topics in the **Web User Interfaces** documentation:

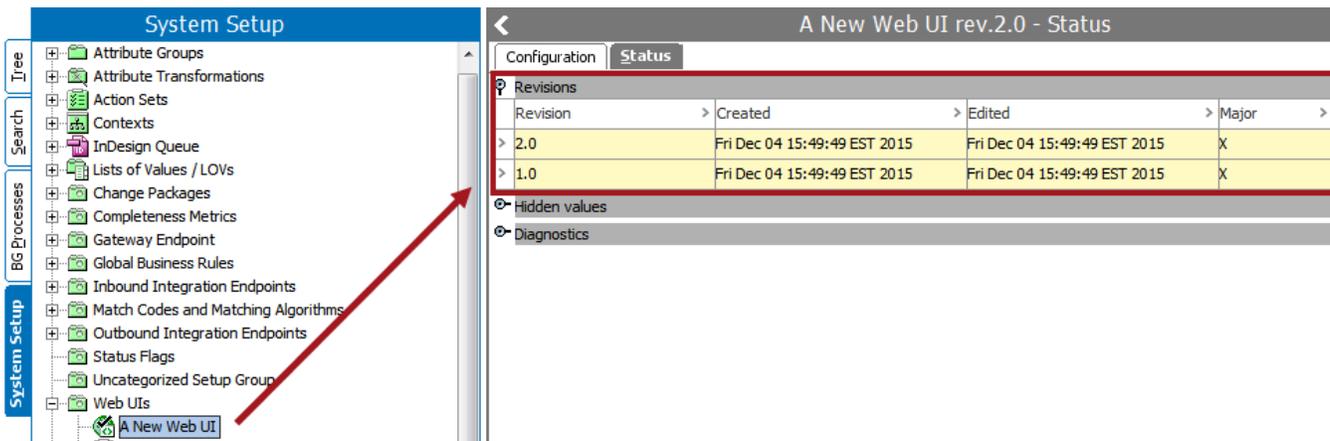
- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- Web UI Designer Reference Guide

# Managing Web UI Configurations

Each time a change to a Web UI configuration is saved, a revision is created and listed in the STEP Workbench. This allows users to better manage the Web UI. There may be a need to revert to a previous revision if a configuration error is made. And if a particular revision contains an error, it can be removed (purged) so that it cannot be used again.

Revisions can be viewed from the **System Setup** tab in the workbench. Click on the Web UI name and then on the **Status** tab to view the revisions for that particular Web UI configuration.

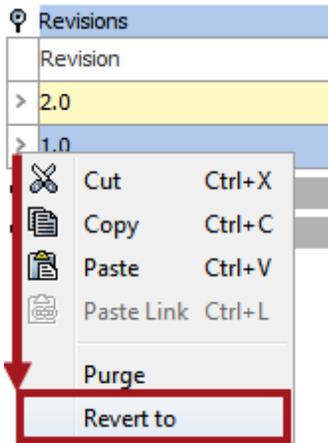
Revisions are shown with the latest (newest) one at the top of the list. Each revision is shown with the date it was created and edited, the user who made the changes, and system revision comments.



## Reverting to an Older Revision

Revert a Web UI configuration to an earlier revision by following these steps in the workbench:

1. In **System Setup**, select the relevant Web UI configuration.
2. Click the **Status** tab.
3. Click the arrow to the left of the row that contains the revision that you would like to revert to, then select **Revert to**.

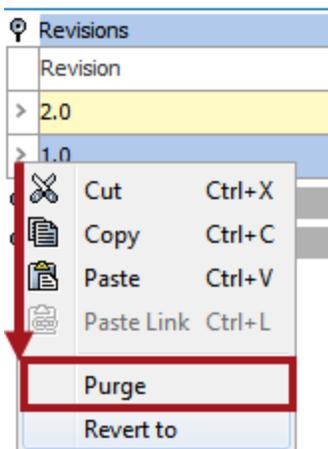


The Web UI configuration is now reverted to the selected revision and a new revision is created.

## Purge a Web UI Configuration Revision

To remove a Web UI configuration revision from the revision history:

1. In **System Setup**, select the relevant Web UI configuration.
2. On the **Status** tab, click the arrow to the left of the row that contains the revision to purge, and then click **Purge**.



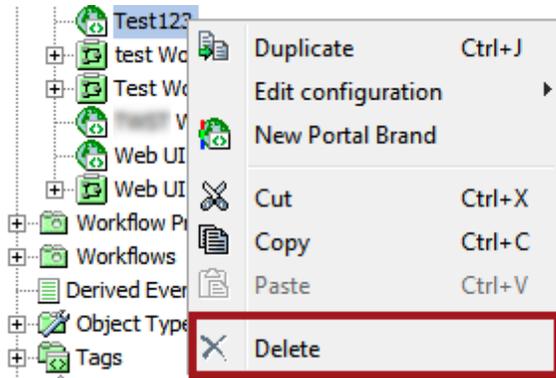

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**Note:** If you purge a Web UI configuration revision and then later revert a workflow to a version that is dependent on the purged configuration revision, it may result in the workflow and/or Web UI configuration not working as expected.

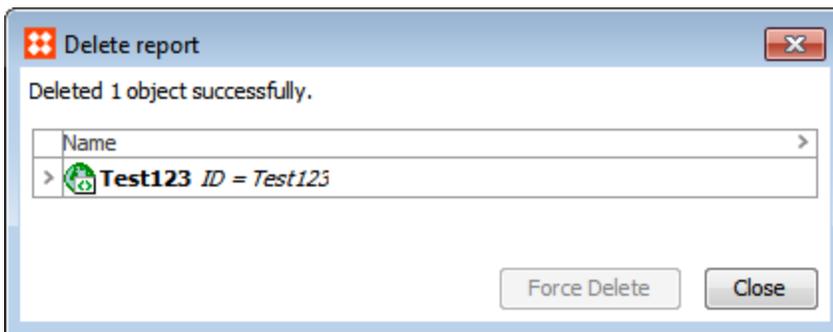
---

## Delete a Web UI Configuration

1. In **System Setup**, expand the Setup Group that contains Web UI configurations.
2. Right-click the Web UI configuration you wish to delete.



1. Select **Delete** from the menu.
2. Click **Delete** again once the 'Delete' dialog appears. (If you decide you do not want to delete the Web UI, click **Cancel** to exit without deleting.)
3. Observe on the 'Delete report' dialog that the Web UI was deleted successfully.



If there is anything stopping the Web UI configuration from being deleted, warning messages will be shown in the 'Delete report' dialog. You should review these messages carefully and make any changes, if applicable. Choosing 'Force Delete' is only an option when the button is active and should be used with caution.

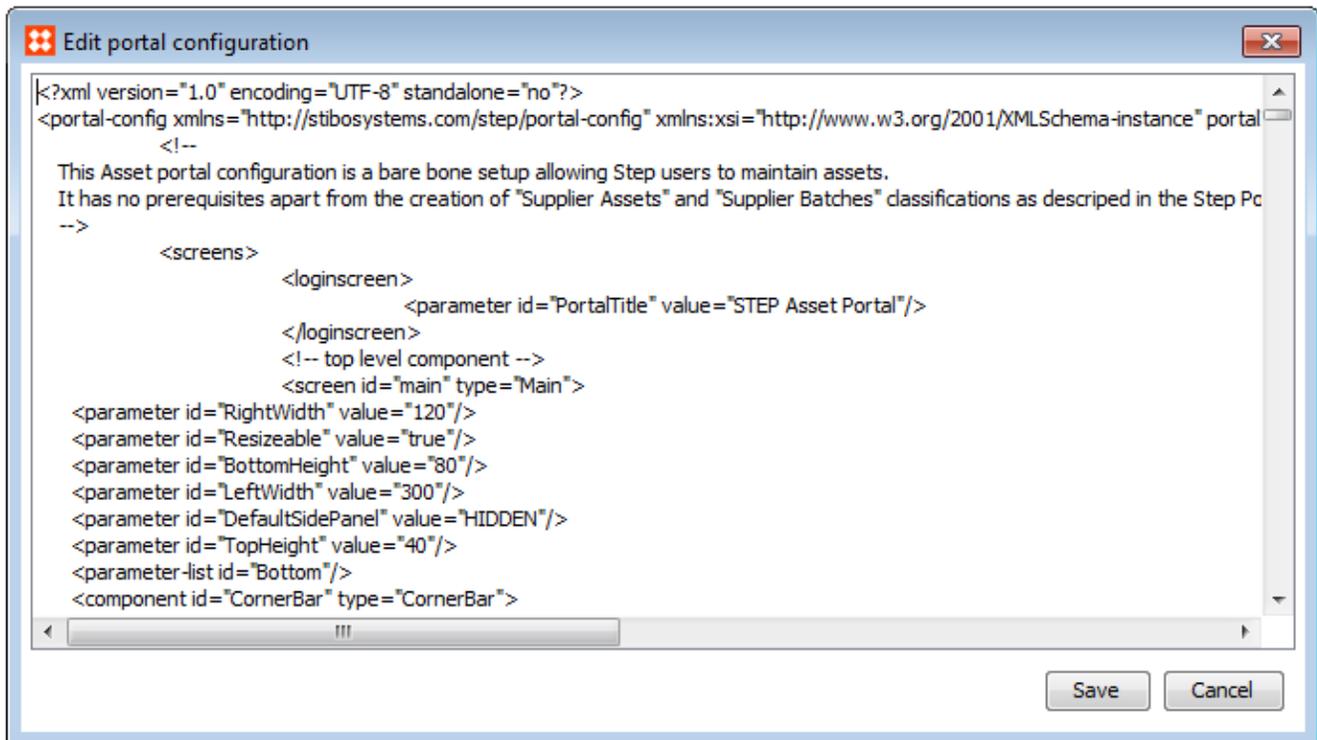
## Edit a Web UI Configuration

While it is recommended that Web UI configurations are done through Web UI designer so that you are notified when making invalid design choices, a Web UI configuration is actually an XML file that contains all the information about the content of the Web UI. The XML for a Web UI configuration can be edited and can be used for building custom screens. Editing the Web UI XML should be done with caution, as an error in the XML syntax or content can potentially break the Web UI.

To edit the Web UI XML:

1. Go to **System Setup** and expand the Setup Group that contains Web UI configurations.
2. Right-click the Web UI configuration you wish to edit.
3. Select the menu item **Edit configuration**.

4. Select **Internal editor** (shown below) or **External editor** (if you have a software program that allows for editing of XML files).
5. Edit the XML for the Web UI once the editor appears.
6. Click the **Save** button to save the changes.



By editing the XML, It is possible to apply restrictions to specific components or parameters so that they can only be seen by specific user groups. In the example below, the Status Selector Homepage Widget will only be visible to users in the 'Data Stewards' user group due to the presence of the 'restrict="Data Stewards"' attribute.

```
<component restrict="Data Stewards" type="StatusSelectorHomepageWidget">
  <!-- conf left out -->
  <parameter-list id="States">
    <parameter value="Enrich"/>
    <parameter value="Marketing"/>
    <parameter value="Verify"/>
  </parameter-list>
  <parameter id="Title" value="Onboarding Workflow"/>
  <parameter-list id="InitiateScreenSelectors"/>
</component>
```

In a similar way, a single state could be restricted:

```
<component type="StatusSelectorHomepageWidget">
  <!-- conf left out -->
  <parameter-list id="States">
    <parameter restrict="Data Stewards" value="Enrich"/>
    <parameter value="Marketing"/>
    <parameter value="Verify"/>
  </parameter-list>
  <parameter id="Title" value="Onboarding Workflow"/>
  <parameter-list id="InitiateScreenSelectors"/>
</component>
```

For information on how to use the Web UI Designer, see the following topics in the **Web User Interfaces** documentation:

- Designer Access
- Design Mode Basics
- Selecting Components
- Configuring Components
- Web UI Designer Reference Guide

For more information, see the **Accessing a Web UI** section of the **Web User Interfaces / Web UI Getting Started** documentation.

## Designer Access

The STEP Web UI Designer enables users to modify any STEP Web UI to better suit business needs. Web UI components can be added, configured / reconfigured, and unused components can be deleted from showing on screen, allowing users to focus on the tasks at hand. Furthermore, the Web UI Designer allows for basic look-and-feel changes, such as company logo, colors, and screen font size.

The user or users accessing Designer must have user privileges to make Web UI configuration changes.

### Applying an Update Web UI Configuration Action Set

First, an 'Update Web UI configuration' action will need to be created if it does not already exist as a stand-alone item or as part of an existing Action Set. This privilege enables users to run a Web UI in design mode.

1. Go to **System Setup** in the STEP Workbench.
2. Under **Action Sets**, right-click Setup Actions and add a New Action Set.
3. Type in an ID and Name then click Create. In this example, the name is 'Web UI Designer.'
4. Click on the new action set that was just created (Web UI Designer) and go to the Action Set tab.
5. Click on the Add Action link and select 'Update Web UI configuration' then click Select.
6. Go to the **User & Groups** section of **System Setup** and click on the user group that needs Web UI Designer access.
7. On the Privilege Rules tab, click the Add Privilege link under the Setup Privileges flipper.
8. In the 'Add Privilege Rule' dialog box, click the ellipsis next to the Action Set field and choose the Action Set you just created (Action Sets > Setup Actions > Web UI Designer). Then, click Select.
9. Click Save.

---

**Note:** Adding the 'Update Web UI configuration' action allows a user to see the design mode icon once they log into a Web UI. At a minimum, the actions 'View context' and 'View setup group' must also be added to the user group privileges before a user is able to log in to a STEP Web UI. Read more in the **Accessing a Web UI** section of the **Web User Interfaces / Web UI Getting Started** documentation.

---

For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

Web UI configurations will, by default, not be user / user group specific. That is, apart from the fact that the standard privilege setup can influence what a user sees / is able to do, the Web UI will be the same for all users logging in.

By editing the XML, It is possible to apply restrictions to specific components or parameters so that they can only be seen by specific user groups. In the example below, the Status Selector Homepage Widget will only be visible to users in the 'Data Stewards' user group due to the presence of the 'restrict="Data Stewards"' attribute.

```

<component restrict="Data Stewards" type="StatusSelectorHomepageWidget">
  <!-- conf left out -->
  <parameter-list id="States">
    <parameter value="Enrich"/>
    <parameter value="Marketing"/>
    <parameter value="Verify"/>
  </parameter-list>
  <parameter id="Title" value="Onboarding Workflow"/>
  <parameter-list id="InitiateScreenSelectors"/>
</component>

```

In a similar way, a single state could be restricted:

```

<component type="StatusSelectorHomepageWidget">
  <!-- conf left out -->
  <parameter-list id="States">
    <parameter restrict="Data Stewards" value="Enrich"/>
    <parameter value="Marketing"/>
    <parameter value="Verify"/>
  </parameter-list>
  <parameter id="Title" value="Onboarding Workflow"/>
  <parameter-list id="InitiateScreenSelectors"/>
</component>

```

## Entering Design Mode

Entering design mode can only be done by privileged users. These users can enter design mode by clicking on a launch button within Web UI or by entering a specific design mode URL into a web browser. Both methods are explained below.

### Launch Button on Homepage

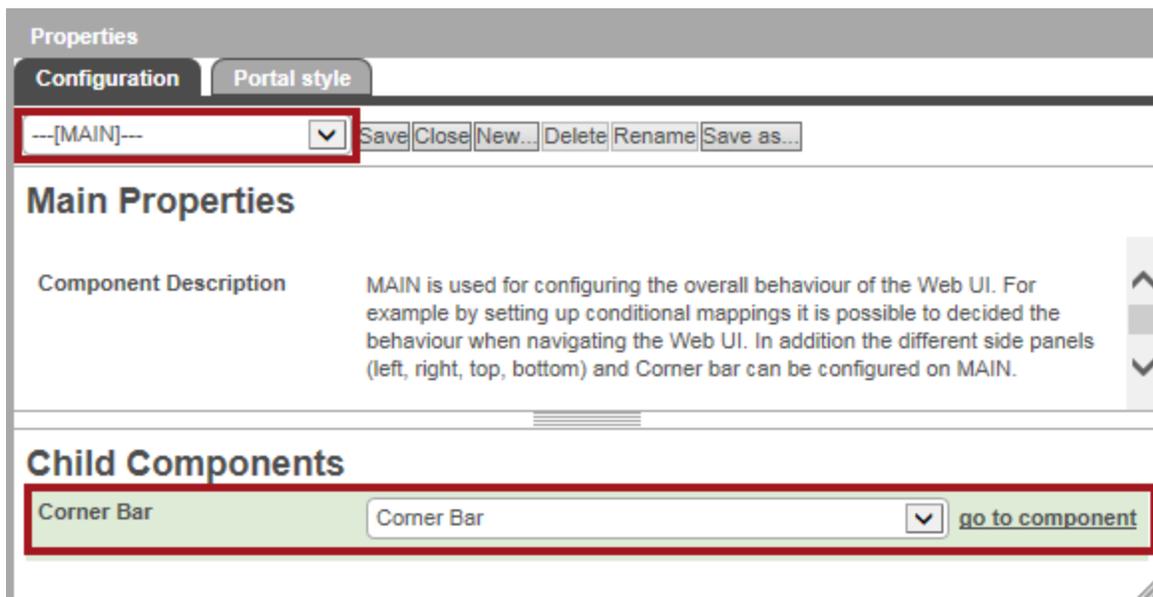
1. Log in to the Web UI.
2. Click the design mode launch button icon found on the homepage (shown in the user widget).



## Launch Button on Other Pages

A design mode launch button can also be configured to show in the Corner Bar component. Once configured, a user can click the icon and enter design mode from any page within Web UI.

1. Log in to the Web UI.
2. Click the design mode launch button icon found on the homepage (shown in the user widget).
3. Once in the Web UI Designer, select the **---[MAIN]---** screen using the dropdown selector.
4. Go to the bottom of the Main Properties screen and find the Corner Bar Child Component.
5. Click the **'go to component'** link.



6. On the Corner Bar Properties screen, click Add under the Items field and choose **Corner Bar Design Mode Action**.
7. Click Add again.
8. Click the **Save** button in the Web UI Designer.

When you navigate to the various screens within Web UI, you will now see the design mode icon in the right corner of the screen.



**Background Processes List** → ⚙️ 🏠

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TemplateID	ID	Started By	Progress	Start Date	Finish Date	Result
Export Manager f	<a href="#">BGP_109262</a>	USER	🕒 Waiting	9/16/15 2:47 PM	Not finished yet	
Export Manager f	<a href="#">BGP_123126</a>	GUEST	✅ Succeeded	12/1/15 4:13 PM	12/1/15 4:15 PM	📄
Export Manager f	<a href="#">BGP_123127</a>	GUEST	✅ Succeeded	12/1/15 4:45 PM	12/1/15 4:45 PM	📄

⏪ ⏩ 1-3 of 3 ⏪ ⏩

## Append URL in Browser

If a launch button is not already configured, or just as an alternative method, a user may access design mode by appending the Web UI URL to include **#designmode=true** at the end. If the Web UI URL already includes the '#' character, it needs to be appended with the string **&designmode=true** instead. Users will be automatically entered into design mode after entering their username and password on the standard Web UI login screen.

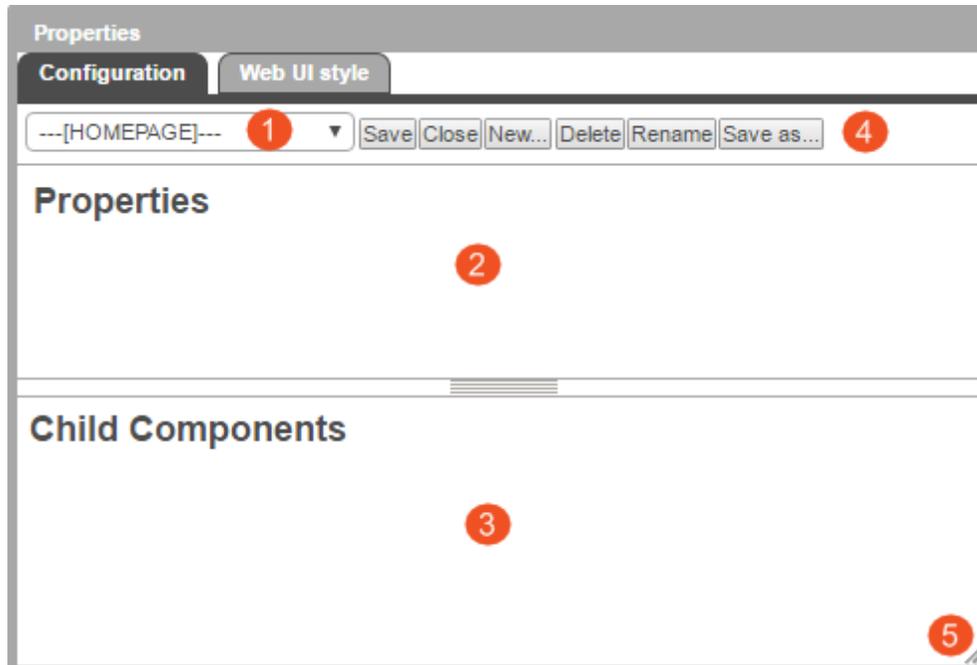
As a basic example, here is what the URL will look like in both cases for a Web UI configuration where the system name is 'your-system' and the Web UI configuration ID is 'ANewWebUI':

`http://your-system/webui/ANewWebUI#designmode=true`

`http://your-system/webui/ANewWebUI#contextID=Context1&workspaceID=Main&screen=Import&designMode=true`

## Design Mode Basics

The STEP Web UI Designer Graphical User Interface (GUI) is divided into four main areas plus a drag handle for window resizing:

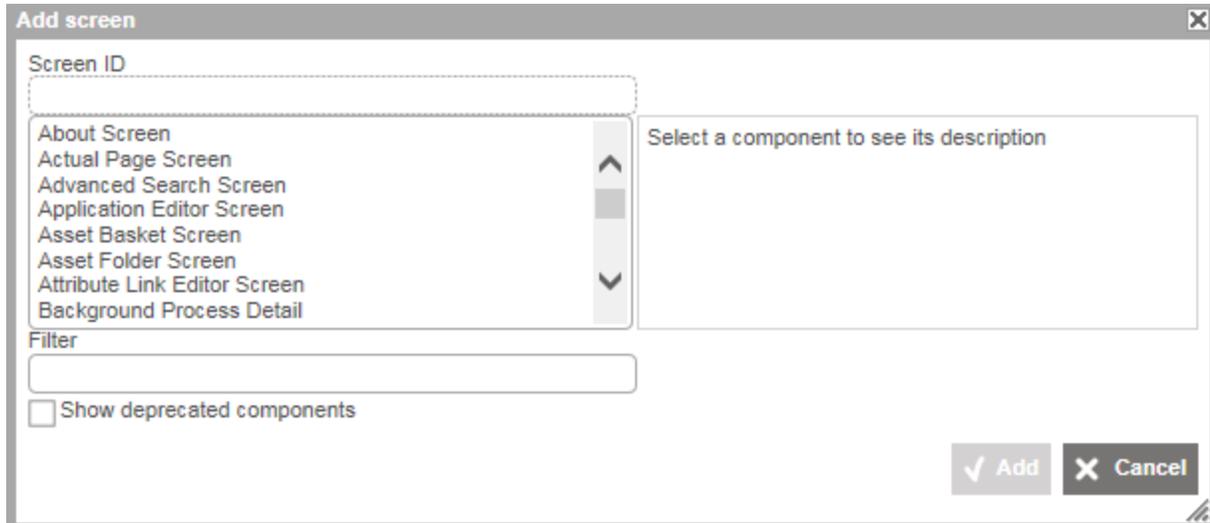


1. **Screen dropdown:** Here you can select which screen / component to review and edit.
2. **Properties area:** The main component properties of a selected screen are displayed and edited here.  
Parameters are grouped together on the component properties screens for easier understanding of parameter interactions. Parameters that are required, as well as those frequently used, are shown immediately when opening a properties page. Additional optional parameters are grouped by topic and displayed when the user clicks the arrowhead preceding the group.
3. **Child components area:** This is the area where child components can be edited, deleted, and created. The area only displays information if the selected component can contain child components. If unavailable, the area under the Child Components header is empty.
4. **Action icons:** Clickable icons allow users to save changes to the properties configuration, close / exit the properties window, create a new screen, rename a screen, or save a configuration as new screen ID. Each option is explained in greater detail in this documentation.
5. **Resizable window:** By dragging the lower right corner of the design window, users can adjust the screen to easily view all available content. The component fields within the window adjust in size to match the size of the window.

## Creating a New Screen

Select a component from a list and give it an identifying screen ID. The screen ID will show in the dropdown once saved.

1. Click the **New...** button in the Designer.



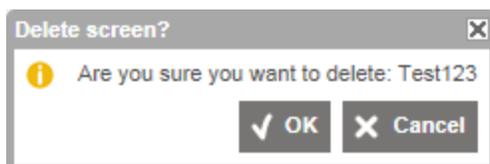
2. In the 'Add screen' dialog, enter an ID for the new screen in the **Screen ID** field. Make it descriptive so that it can be easily identifiable when a user looks through Screen IDs to make a selection.
3. In the screen type list, select the screen type you want to create by clicking on the displayed screen ID. Click the ID to view explanations on the different types. Use the **Filter** field to quickly display only the components matching the text entered in the filter box.
4. Click the **Add** button.

The new screen is created and displayed in the Web UI. You can now configure any applicable parameters and child components within the properties dialog.

## Deleting a Screen

Delete an existing screen ID, and the ID will be removed from the screen dropdown list.

1. Select the screen you want to delete from the dropdown screen list.
2. Click the **Delete** button in the clickable icon row of the Designer window.
3. A 'Delete screen?' dialog appears. Click **OK** to proceed.



The screen is now deleted.

---

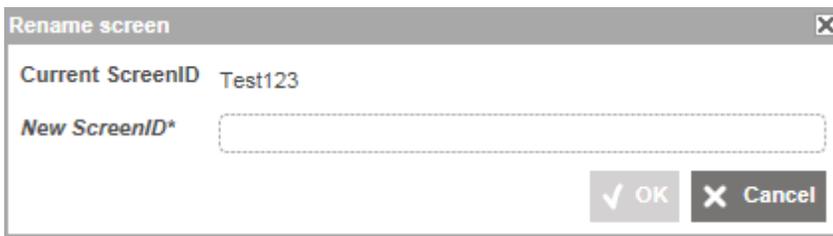
**Note:** If a screen is referenced by other parts of the configuration a warning will appear telling where the screen is referenced. The screen cannot be deleted until the references are deleted. The delete button is inactive when you are on the ---[LOGIN]---, ---[MAIN]---, or ---[HOMEPAGE]--- screen IDs.

---

## Renaming a Screen

Rename an existing screen ID to a new screen ID, and the existing screen ID will be replaced by the new one.

1. Select the screen you want to rename from the screen list.
2. Click the **Rename** button in the Designer.
3. A 'Rename screen' dialog appears. Enter the new name for the screen ID.



4. Click **OK**.

The screen is now renamed. If the renamed screen is referenced somewhere else in the Web UI configuration, the old name (screen ID) will automatically be replaced by the new name.

## Changing the Web UI Style

The settings on the **Web UI style** tab can be changed any time designer is open. The Web UI style is applicable to the entire Web UI and not just for the screen and/or component being configured.



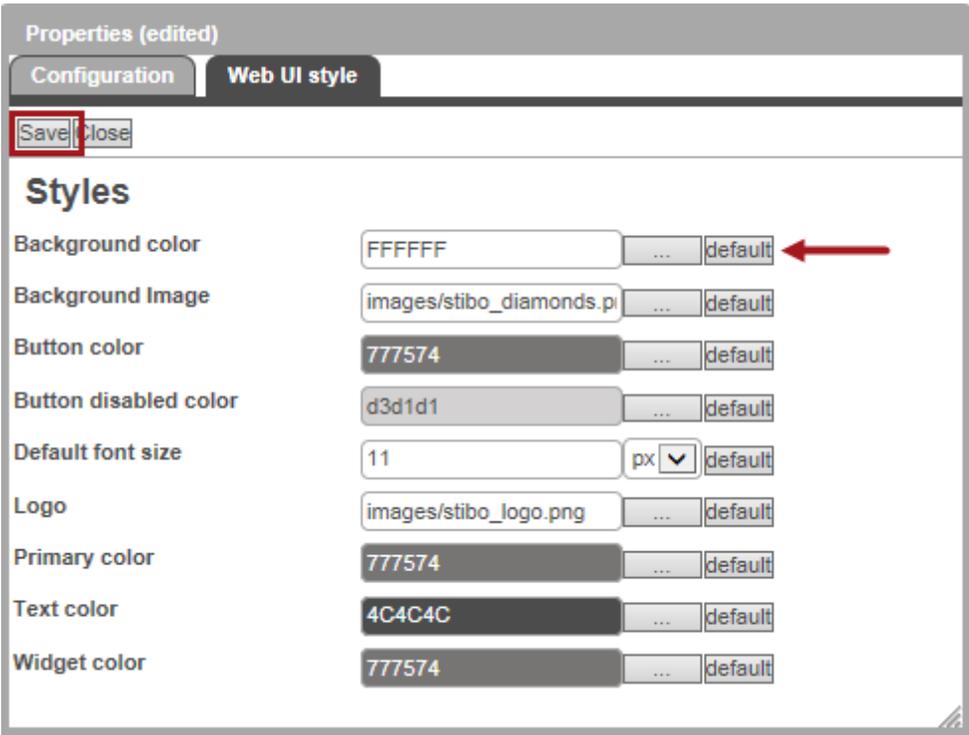
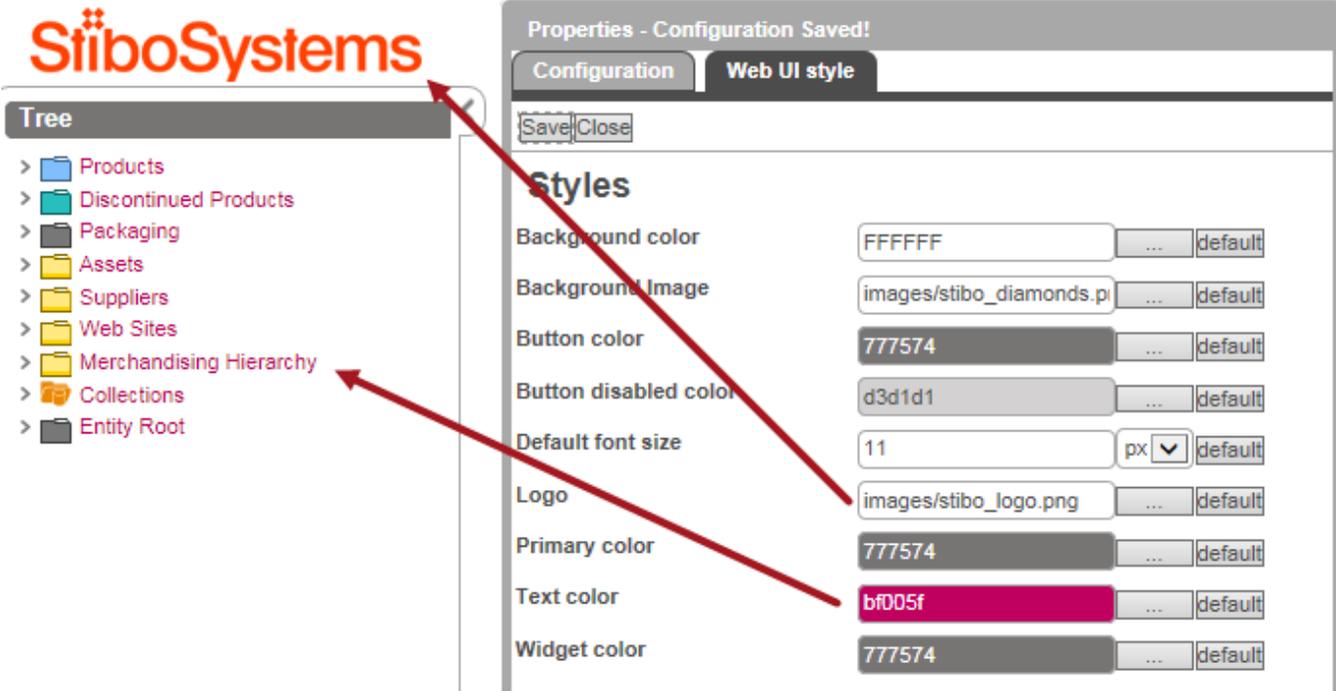
1. While on the Web UI style tab, click the ellipsis button (...) to bring up the settings dialog, if applicable. For font size, input the size directly in the value field and use the dropdown selector.
2. For color selections, drag the marker to pick a color or manually enter one of the color codes in the value boxes. If selecting an image, make a selection using search or browse in the Select Node(s) dialog.

---

**Note:** The recommended size for Logo files is 200 x 40 pixels. Background Image files should be larger than 1000 x 800 pixels. Use caution uploading Web UI style image files with a super high resolution, since this may cause Web UI pages to load slowly.

---

- 3. Click **OK**.
- 4. Continue making configuration selections, as desired.
- 5. Click the default button next to any style to remove a selection you have made.
- 6. Click the **Save** button within the Web UI style tab.



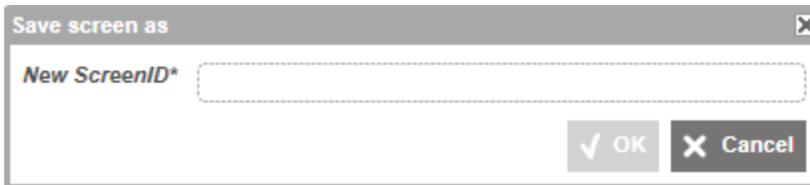
## Saving Changes to a Configuration

There are two options for saving screens in the Designer.

**Save:** After making configuration edits, simply click the **Save** button. The screen is saved with the current screen ID.

**Save as:** Saving a screen configuration under a new screen ID:

1. Click the **Save as** button in the Designer.

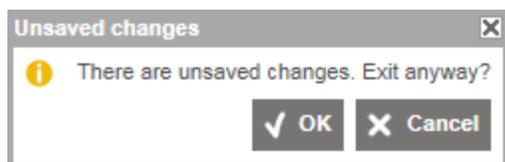


2. When the 'Save screen as' dialog appears, enter an ID for the new screen. Make it descriptive so that it can be easily identifiable when a user looks through Screen IDs to make a selection. Both the new screen ID and the original screen ID show in the screen dropdown list.

## Exiting Design Mode

Exit design mode by clicking the **Close** button.

If you have unsaved configuration changes, you will receive an 'Unsaved changes' warning.



- Click **OK** to close Designer without saving changes.
- Or, click **Cancel** to be sent back to the properties screen so that you can Save the current screen or Save as a new screen ID.

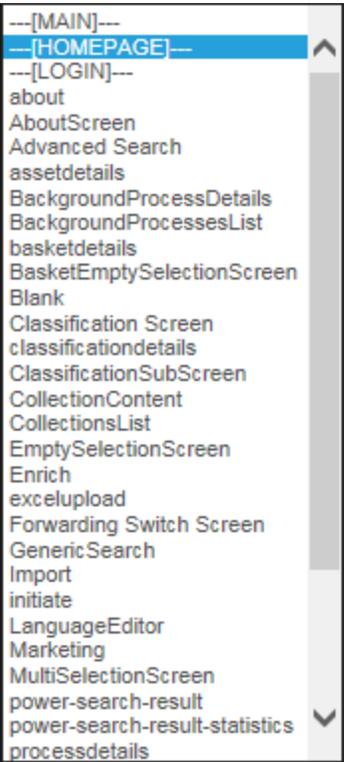
After closing / exiting Designer, the Web UI is now in normal mode.

# Selecting Components

## Choose a Screen and Enter Design Mode

There are two ways to select a screen and enter design mode.

- Navigate through the Web UI to the desired page and then enter design mode using the icon. The screen you are on will automatically be selected.
- Or, enter design mode from the homepage and then select the screen. To select a screen through the Designer, simply click the screen dropdown from the graphic interface and select the screen you want to edit. The desired screen will be shown.



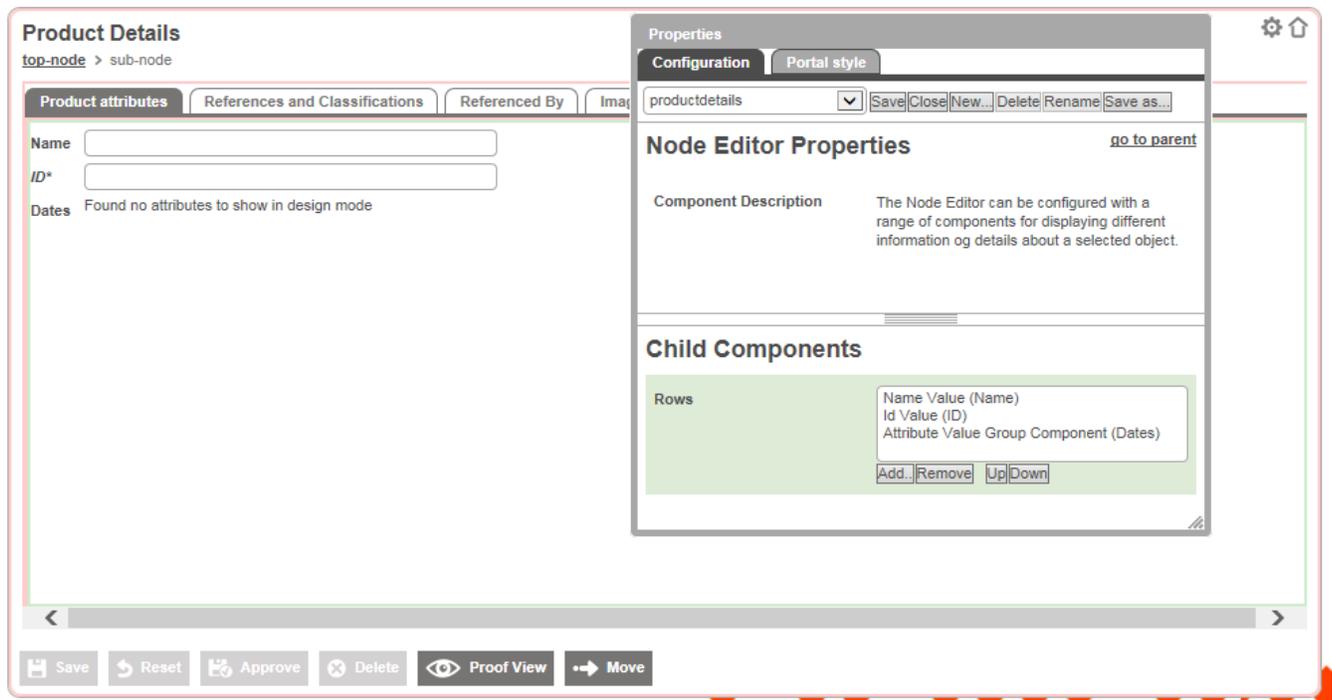
Now you can use Designer to edit the screen properties by configuring the components shown in the properties area and the child components area.

## Select Components to Edit

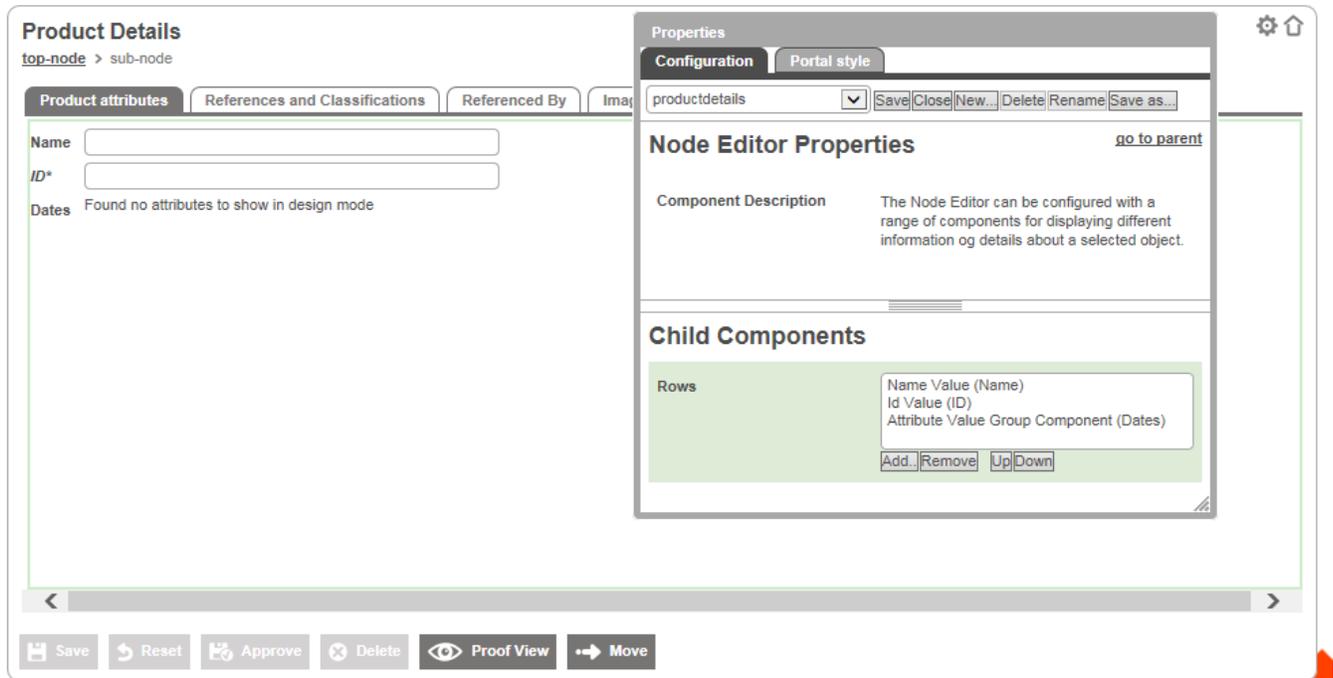
To select a component on a screen, simply click it and the Designer is updated based on the selection. Moving the cursor over the different components on a screen highlights the components that are selectable.

The highlighting patterns are outlined below:

1. Red frame: When you mouse over the component, the red frame indicates that the component can contain child components.



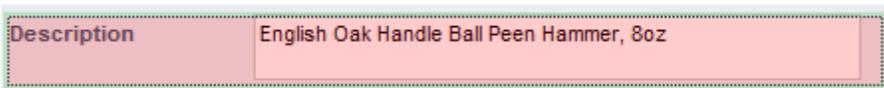
2. Green frame: The green frame is displayed if a component that can contain child components is selected.



3. Red transparent box: Mousing over a component that cannot contain child components.



4. Red transparent box with green frame: Selecting a component that cannot contain child components.



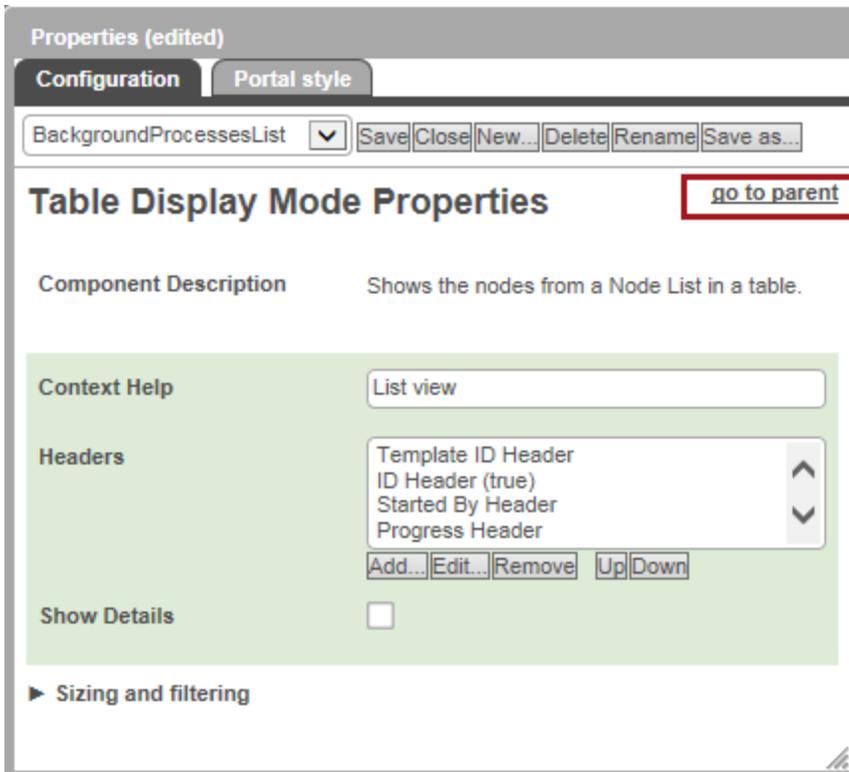
## Navigating Up and Down the Component Structure

Some components are considered 'parent' components and can have a child component or components. In the Web UI, you may not be able to see this relationship, making it difficult to select the right component.

You can select a parent component or a child component easily within the Designer.

### Selecting a Parent Component

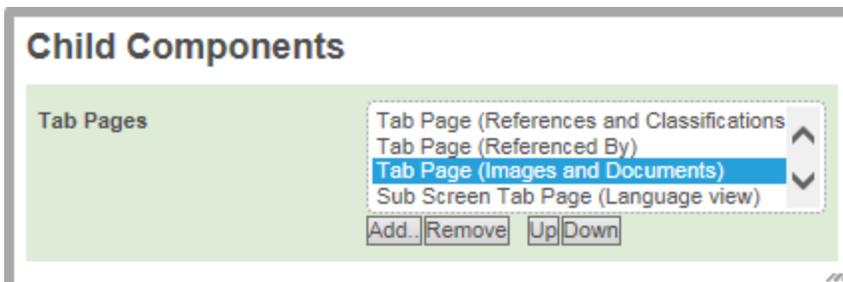
If you have selected a child component and want to select the parent component, use the '**go to parent**' link in the upper right corner of the Properties area to navigate to the parent component. When the 'go to parent' link is no longer showing, you know you are at the top level for that particular component structure.



## Selecting a Child Component

If you have selected a parent component and want to select a child component, there are two ways to do this within Designer.

1. If the child component list allows multiple components, simply double-click the child component:



2. If the child component list only allows for one component, a **'go to component'** link is available next to the component listed in the child components area:

### Child Components

Main	Tab Control	<a href="#">go to component</a>
Buttons	Buttons	<a href="#">go to component</a>
Breadcrumb	Breadcrumb	<a href="#">go to component</a>

For information about **Configuring Components**, see the **Web User Interfaces / Web UI Getting Started** documentation.

For descriptions of the components available within the Web UI Designer, see the **Web UI Designer Reference Guide** in the **Web User Interfaces** documentation.

# Configuring Components

To edit components, select the desired screen and then configure the component properties shown. The properties that are available for each component vary depending on the component type. Configuration options may include the ability to enable / disable parameters based on checkboxes, make displayed component title changes, choose table sorting options, and much more. Configurations may be done by selecting checkboxes, using dropdown menus and node selector buttons to make selections, or by entering text into free-text fields.

The directions given in this document are simple examples on how to use the properties screens. Before beginning any steps, anyone editing components should be familiar with the **Design Mode Basics** section and the **Selecting Components** section of the **Web User Interfaces / Web UI Getting Started** documentation.

## Properties Area

The parameters that are available for each component varies depending on the component type.

1. In design mode, select the component to edit.
2. On the screen, the Designer displays the available properties that can be maintained for the component.
  - The main parameters, those required or used most often, are shown automatically when the properties window opens. They also have a green background.
  - Some parameters are optional and grouped together under headings (e.g., Validity, Advanced, Label Texts, and Selection Screens). These can be accessed by clicking the arrowhead icon next to the heading name.
3. Changes made to the properties may be displayed directly on the screen as changes are made or will become applicable after saving the Properties screen.

Properties

Configuration Portal style

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

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

**Component Description** The Node List displays objects presented in table or in a grid. Different Display Modes can be applied and customised with a range of headers allowing for different information about the listed objects to be displayed.

Hide Standard Buttons

ID\* processesList

Lookup Screen Type For Navigation

Page Size 25

Toolbar Height 30

Use Details Overlay

Default Sorting Order Ascending

Enable Default Sorting

► Label Texts

► Selection Screens

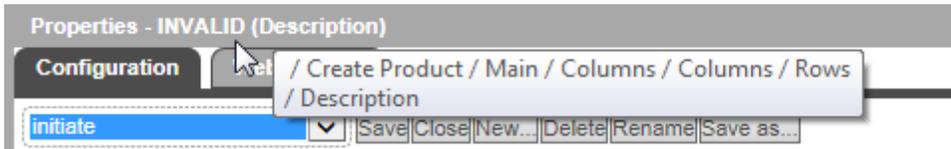
### Child Components

Display Modes Table Display Mode

Add... Remove Up Down

**Note:** If you enter design mode and the Properties dialog indicates that there are INVALID settings, you need to update and/or remove the parameters / components that are not valid for your data structure. For troubleshooting, the Properties dialog header identifies INVALID settings.

Hovering over the INVALID text displays the path to the parameter / component where there is a problem. Once the initial issue is fixed, additional errors may exist and need to be fixed. 'INVALID' will no longer display when validity is restored.



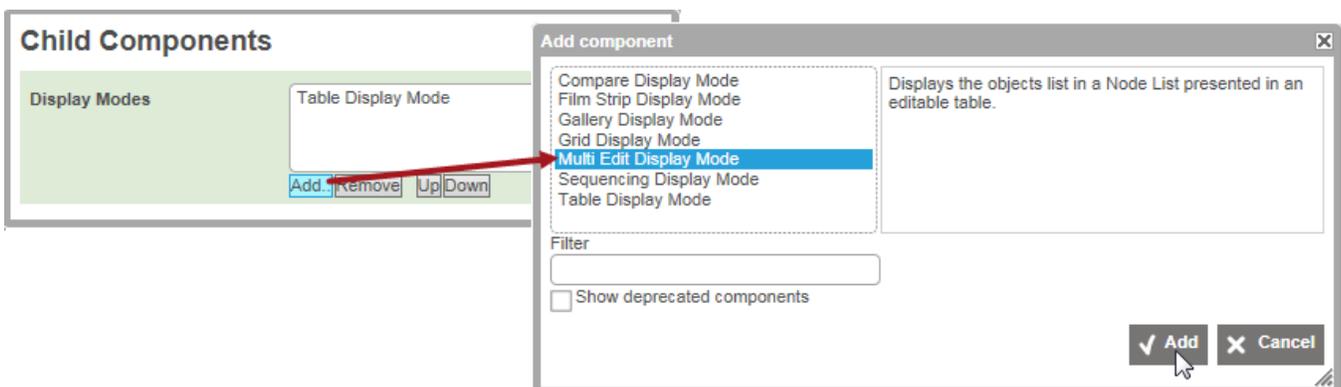
## Child Components

Some Web UI components, called master components, can contain child components. Child components allow a user to drill down further into component configurations. These are maintained in the Child Components area in the Designer. Using the previous screenshot as an example:

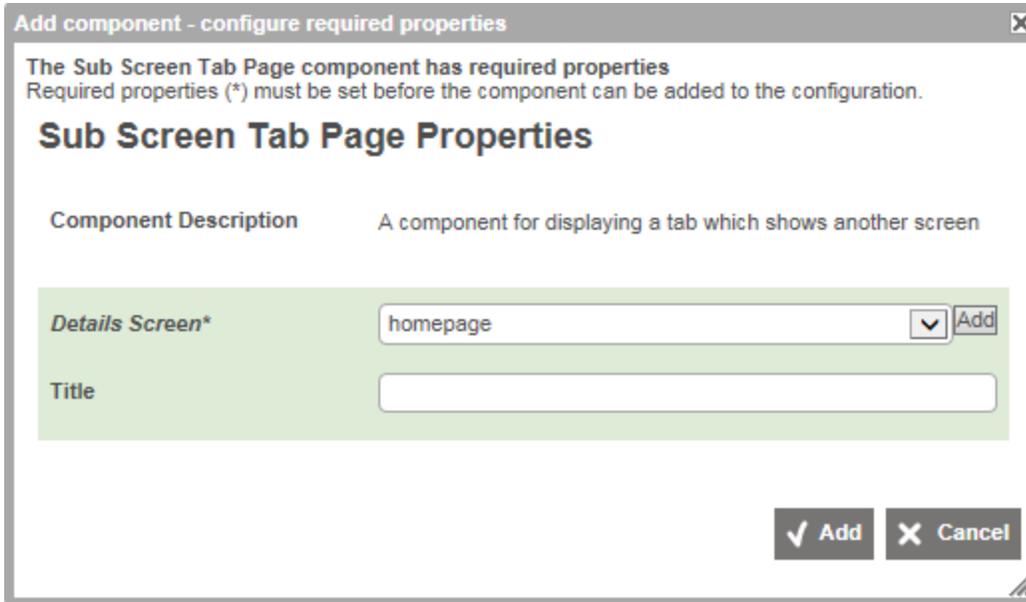
- Select the master component (Node List) you want to edit as described in the Properties Area section of this document.
- In the Child Components area, the child components that have been added to the master component (Table Display Mode) are shown. Remove or add more child components or change the sequence of the child components using the Up and Down icons.

### Adding and Configuring a Child Component

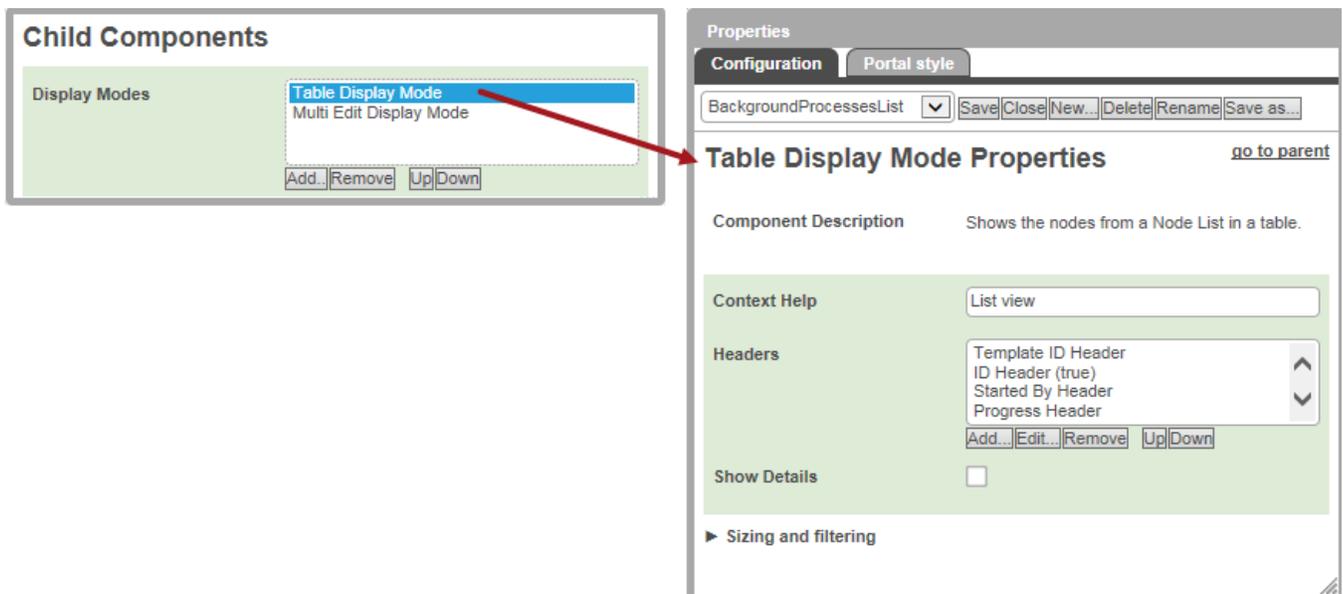
1. In the Child Components area, click the **Add** button, and a list of possible child components will be displayed in an 'Add component' dialog box.



2. Click on a component to make a selection, and then click **Add**.
3. If the chosen child component has a mandatory parameter that must be defined or verified before it can be displayed properly, a dialog will automatically show and selections / changes can be made. As an example, in the screenshot that follows, a user can change the default Details Screen before adding the child component—or leave the default 'homepage' selection and just click Add.



4. If a dialog is not automatically displayed, no immediate component decisions need to be made or verified. The component will be added to the child component list and can be selected / maintained as any other component. To configure the component, double-click on the component name within the child component list and a properties screen will be displayed. Make selections as needed.

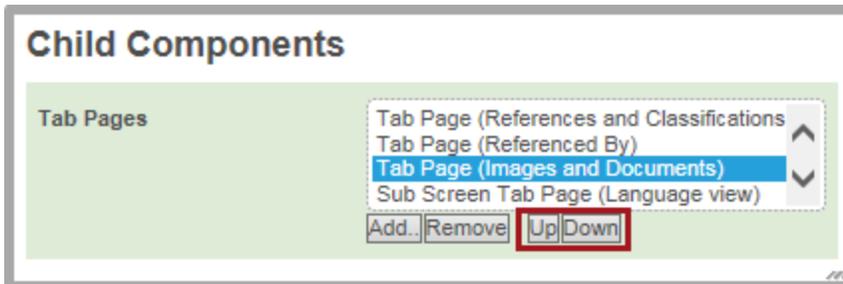


5. Click Save on the properties screen before exiting design mode.

## Changing the Sequence of Child Components

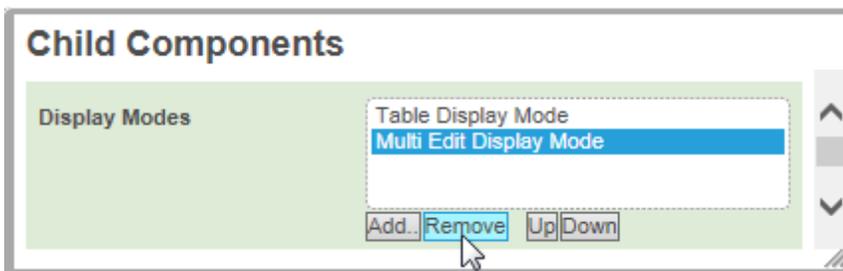
1. In the child component area, click to select the child component to be re-sequenced. In the next screenshot, 'Tab Page (Images and Documents)' is selected.

2. Click the Up or Down button to change the sequence of the selected child component.



## Removing a Child Component

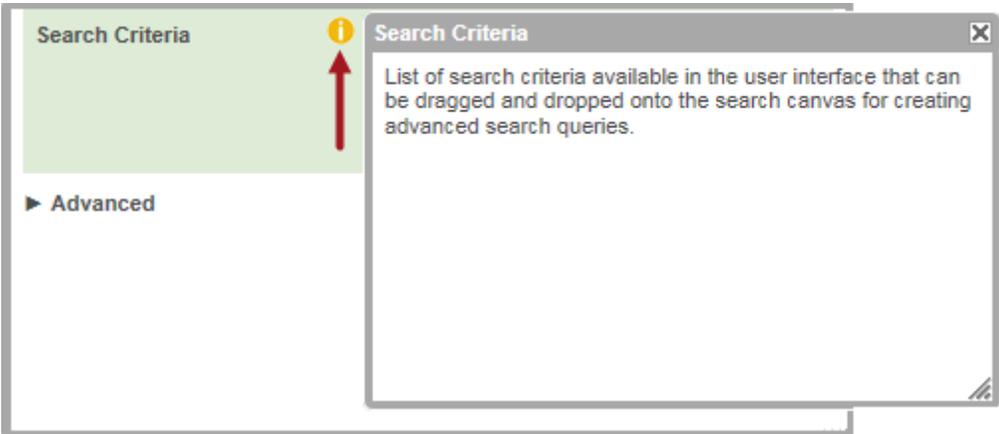
1. In the child component area, click to select a child component. In the next screenshot, 'Multi Edit Display Mode' is selected.
2. Click the Remove button. The child component is removed from the screen.



## Help Text

Context help is available for each component in both the Properties area and the Child Components area, and provides users with a brief explanation about the purpose of the component and/or parameter. This is especially helpful if the user is fairly knowledgeable about a configuration but needs a little guidance completing a step, enabling a specific parameter, or understanding a new component.

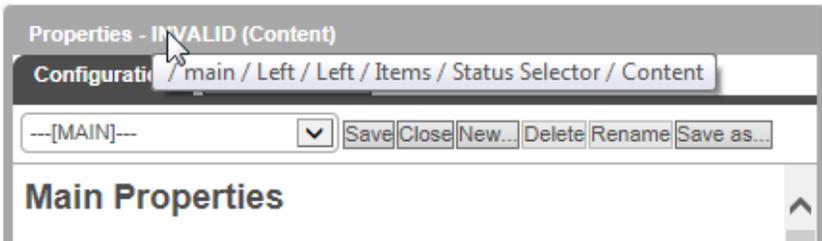
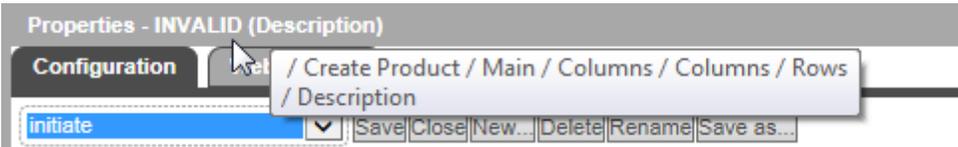
Access help text by placing the cursor over the component / parameter name. A yellow circle icon with an 'i' inside of it will show. Simply click the icon and a dialog box will appear with descriptive help text. To remove the help text box, click the 'x' in the top right corner of the box.



### Invalid Properties

If you enter design mode and the Properties dialog indicates that there are invalid settings, you need to update and/or remove the parameters / components that are not valid for your data structure. For troubleshooting, the Properties dialog header identifies INVALID settings.

Hovering over the INVALID text displays the path to the parameter / component where there is a problem. Once the initial issue is fixed, additional errors may exist and need to be fixed. 'INVALID' will no longer display when validity is restored.



For descriptions of the components available within the Web UI Designer, see the **Web UI Designer Reference Guide** in the **Web User Interfaces** documentation.

## Using Web UI

This documentation gives users more details in regards to how components work and how they can be configured.

# Address Detail

The Address Detail component allows users to look up an address using Google Maps and have address-related attributes auto-populate based on the result.

---

Search

Map Satellite



Map data ©2016 Google, INEGI Terms of Use Report a map error

Street Address

City

State

Zip

Country

The component allows users to create and/or edit address objects and link them to an appropriate related object (e.g., supplier, customer, location).

In addition, the Address Detail component can be extended to integrate with address standardization services.

# Simple Address Component Model Configuration

In order to use the Address Detail component in Web UI, the Simple Address Component Model must first be set up in the workbench. In order to set up the component model, the underlying data structures must be present. Therefore, this topic addresses both underlying data model considerations, as well as instructions for configuration of the component model.

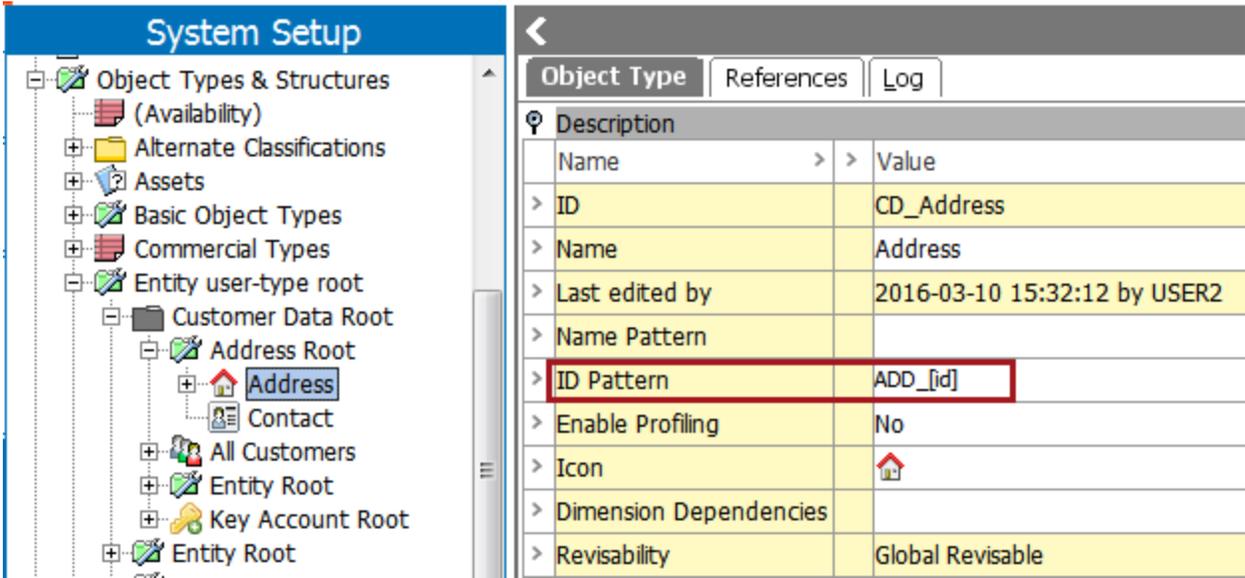
## Prerequisites

Configuring the Simple Address component model requires users to be familiar with the System Setup tab in the STEP workbench and how to configure within this area (e.g., creation and maintenance of object types, attributes, and references). Users must also have the privileges required to carry out these tasks.

## Data Model Considerations and Requirements

In order to set up the Simple Address Component Model and/or the Address Detail component in Web UI, some basic data must be in place. Each element that is required to complete the setup is listed below. However, this should not be understood to be a comprehensive setup for any implementation using addresses and/or customer data, or to indicate any type of data modeling recommendation.

1. An address object type must exist, and it must use an auto-generated ID format (e.g., [id]). An example is shown below.



2. A reference must exist between the address object type and an associated object type (e.g., supplier, customer, location). The address object must be the *target* of the reference. An example is shown below.

The screenshot shows the 'System Setup' interface with a tree view on the left and a configuration panel on the right. The tree view is expanded to 'Entity Reference Types' > 'Customer To Address'. The configuration panel shows the 'Reference Type' tab selected, with a 'Customer' header. The 'Description' section contains the following data:

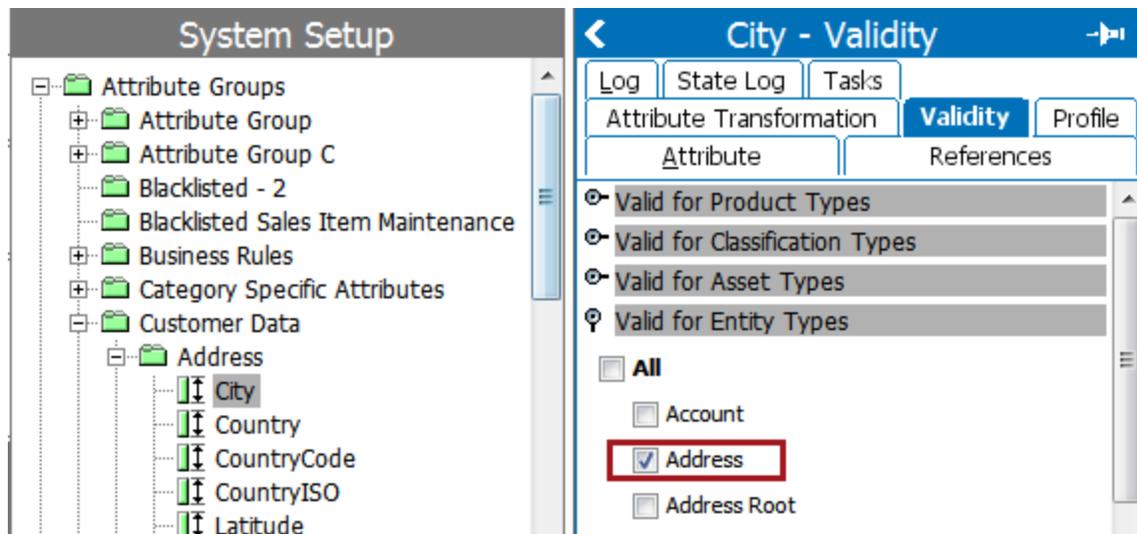
Name	Value
ID	CustomerToAddress
Name	Customer To Address
Last edited by	2016-03-14 18:41:49.724 by USER2
Externally Maintained	No
Dimension Dependencies	
Allow multiple references	Yes
Mandatory	No
Parent/Child relation	Source as parent, Target as Child
Inheritance	None
Completeness Score	123
Purpose	abc

The screenshot shows the 'System Setup' interface with a tree view on the left and a configuration panel on the right. The tree view is expanded to 'Entity Reference Types' > 'Customer To Address'. The configuration panel shows the 'Validity' tab selected. The 'Valid Source Types' and 'Valid Target Types' sections contain the following data:

ID	Name
CD_Customer	Customer
<a href="#">Modify Source Types</a>	
ID	Name
CD_Address	Address
<a href="#">Modify Target Types</a>	

3. Address attributes must exist. The full set of potential attributes to be configured is described within the component model configuration section, below. Each attribute must be a Description attribute and must be valid on the address object. In addition, for the Google integration to work properly in the Web UI Address Detail component, the attributes should be standard text attributes. An example is shown below.

Attribute	References	Attribute Transformation	Validity	Profile
<span>🔍</span> Description				
Name	>	>	Value	
> ID			City	
> Name			City	
> Last edited by			2016-03-10 15:32:13 by USER2	
> Full Text Indexable			No	
> Externally Maintained			No	
> Hierarchical Filtering			None	
> Calculated			No	
> Type			Description	
> Dimension Dependencies				
> Mandatory			No	
<span>🔍</span> Attribute Validation				
Name	>	Value		
> Validation Base Type			Text	
> List Of Values			N/A	
> Multi Valued			No	
> Mask				
> Minimum Value			N/A	
> Maximum Value			N/A	
> Maximum Length			100	
<a href="#">Edit Validation Rule</a>				
<span>🔍</span> Aspects				
Component	>	Name	>	Description
Simple Address Component Model		City		The City



Once the required data model configuration is in place, the component model can be set up.

## Component Model Configuration

When all previously mentioned steps have been completed and the relevant data structures have been defined, it is possible to set up the Simple Address Component Model. The component model settings are essentially the rules that determine the behavior of the Address Detail component in Web UI.

The Simple Address component model is also used for address standardization extensions, but as they are extensions to the system, this use is out of scope for this material.

The Simple Address Component Model is found under Component Models on the System Setup tab.

The screenshot shows the 'System Setup' interface with a tree view on the left and a 'Component Model Configuration' table on the right. The table lists various fields and their mappings to address object types.

Name	Value	Description
> Simple Address	Address	Simple Address Object Type
> City	City	The City
> Country	Country	The Country
> Latitude	Latitude	The Latitude
> Longitude	Longitude	The Longitude
> Quality	Quality	Quality attribute for simple address
> Standardized City		The standardized city
> Standardized Country		The standardized country
> Standardized Latitude		The standardized latitude
> Standardized Longitude		The standardized longitude
> Standardized State		The standardized State
> Standardized Street		The standardized street
> Standardized Street Name	Standardized Street	The standardized street name
> Standardized Street Number		The standardized street number
> Standardized Street Post Qualifier		The standardized street post qualifier
> Standardized Street Pre Qualifier		The standardized street pre qualifier
> Standardized Street Type		The standardized street type
> Standardized Zip		The standardized Zip
> State	State	The State
> Street	Street	The Street
> Street Name		The Street Name
> Street Number		The Street Number
> Validation Response	Validation Response	The Cached Validation Response
> Zip	Zip	The Zip

At the bottom of the table, there is a blue 'Edit' link.

If the Simple Address Component Model is not present, contact your Stibo Systems account manager.

Each field in the component model has the option to be mapped. Most mappings are self-explanatory, but some tips and guidelines for completing the configuration are noted below.

- The Simple Address mapping must be configured. The selection should be the address object type referred to in step 1 of the data model considerations and requirements, above.
- The Street, Street Name, and Street Number parameters are closely related. Street is used to hold a complete street address, including a house or building number, as well as a street name. Street Name holds the street name only, while Street Number holds the building / house number only. These separated fields are especially useful when dealing with standardization and/or deduplication of addresses. Note that Street is required, while Street Name and Street Number are optional.
- Any attributes for which address data should be stored must be populated. Some mappings are required, while others are optional. The screenshot above displays a configuration with only the required mappings populated - this is the minimum configuration required to enable saving and use of the component model.

## Editing the Component Model

To edit the component model mappings, click the blue Edit link shown at the bottom of the table. This will open the editor, allowing you to add, edit, and remove mappings.

**Edit Component Model Configuration**

Name	Value	Description
Simple Address	Address	Simple Address Object Type
<b>City</b>		The City
Country	Country	The Country
Latitude	Latitude	The Latitude
Longitude	Longitude	The Longitude
Quality	Quality	Quality attribute for simple address
Standardized City		The standardized city
Standardized Country		The standardized country
Standardized Latitude		The standardized latitude
Standardized Longitude		The standardized longitude
Standardized State		The standardized State
Standardized Street		The standardized street
Standardized Street Name	Standardized Street	The standardized street name
Standardized Street Number		The standardized street number
Standardized Street Post Qualifier		The standardized street post qualifier
Standardized Street Pre Qualifier		The standardized street pre qualifier
Standardized Street Type		The standardized street type
Standardized Zip		The standardized Zip
State	State	The State
Street	Street	The Street
Street Name	Street Name	The Street Name
Street Number	Street Number	The Street Number
Validation Response	Validation Response	The Cached Validation Response
Zip	Zip	The Zip

Save   Restore live settings   Save pending   Cancel

When editing, double-click the + icon to make value additions and the X icon to remove any existing values. If the + icon is inactive, then the value must be removed before trying to add a new one.

Rows that are required to be populated will show a red X when not populated. In this case, the Save button is disabled and only the Save pending button is available. The required values must be populated before a true save can be completed.

Once the component model has been configured, the Address Detail component can be configured in Web UI. For information on how to complete the Web UI configuration, see the **Address Detail Configuration** section in the **Web User Interfaces / Address Detail** documentation.

# Address Detail Configuration

This section details how to configure the Address Detail component in Web UI to be used for simple address lookups and creation of address objects. The component can also be used as part of address standardization extensions, but as they are extensions to the system, this use is out of scope for this material.

Configuration of the Address Detail component requires designers to configure a screen, Node Editor, and the Address Detail component itself. Detailed instructions for each piece of the configuration are below.

## Prerequisites

In order to configure the Address Detail component, the Simple Address Component Model configuration must have been previously completed. Additional information can be found in the Simple Address Component Model section of the Web UI Address Detail documentation.

It is expected that anyone configuring the Address Detail component is familiar with the Web UI Designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer, as well as to create and maintain attributes.

## Configuring the Screen

The Address Detail component must be created on a Node Details screen type, and more specifically, on a Node Editor child component. Therefore, the first step in configuring this component is to select an existing Node Details screen to add the component to, or to create a new screen.

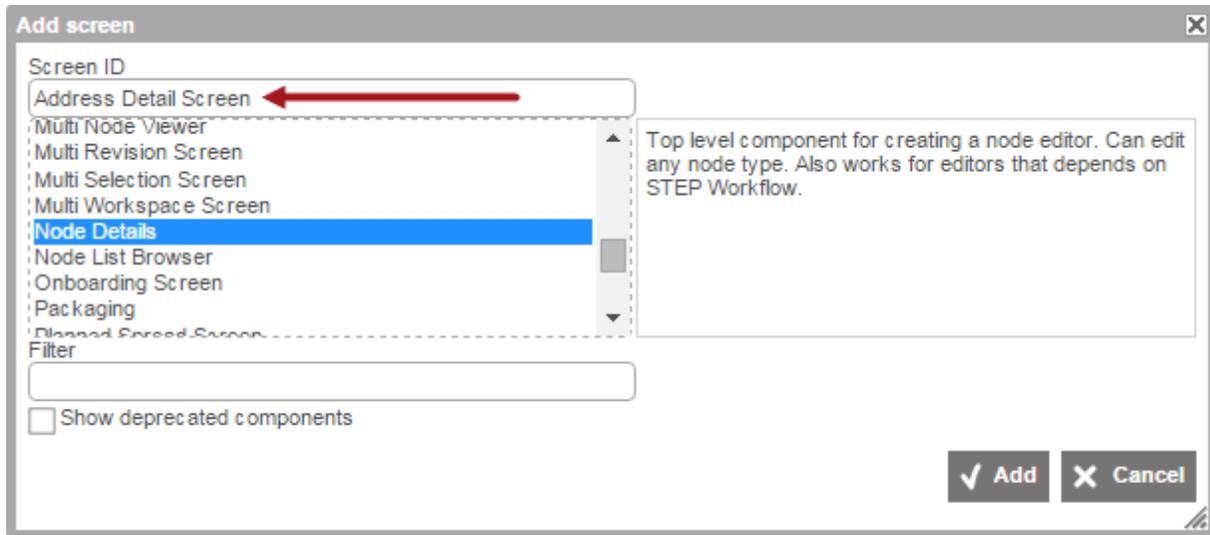
For simplicity, this example will use a new Node Details screen with a Node Editor child component. However, it should be noted that the Address Detail component could also be configured using a Tab Control child on the Node Details screen (followed by a Tab Page child on the Tab Control component, and a Node Editor child on the Tab Page). If Address Detail is being added to an existing tabbed screen, skip to the next section (Configuring the Node Editor).

Steps for creating a new Node Details screen with a Node Editor child are below.

1. Click the **New** button in the Designer to create a new screen.



2. Choose **Node Details** from the screen list and type in a Screen ID.



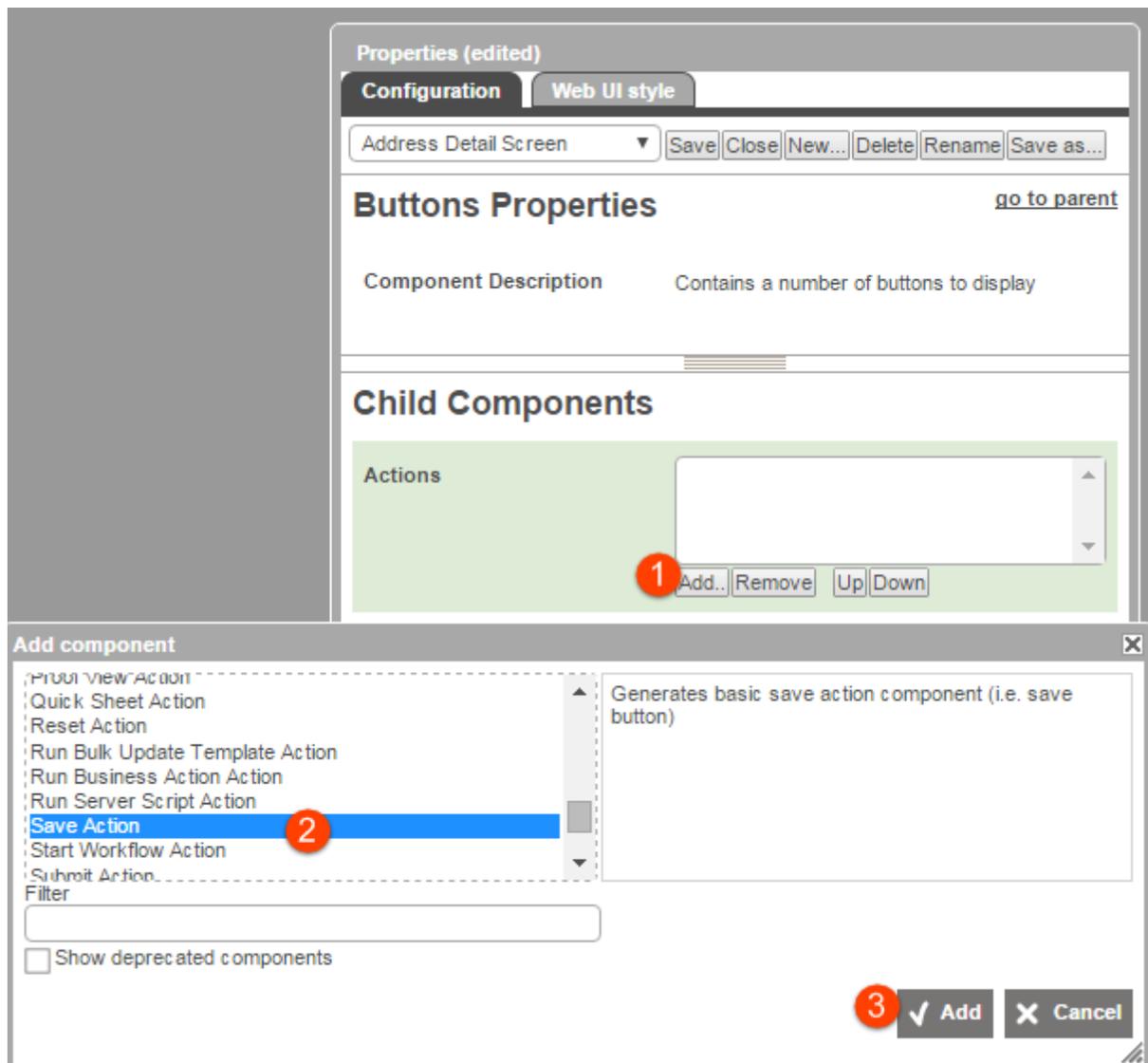
3. Click **Add**.
4. The Add screen dialog window will close and you will be returned to the primary designer window.
5. In the Node Details Properties, go to the Child Components > Main parameter and select **Node Editor**.

The screenshot shows a software configuration window titled 'Properties (edited)'. It has two tabs: 'Configuration' and 'Web UI style'. Below the tabs is a dropdown menu set to 'Address Detail Screen' and a row of buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main content area is divided into two sections. The first section, 'Node Details Properties', contains a 'Component Description' field with the text: 'Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.' Below this are two input fields for 'Title' and 'Css Class'. There are also expandable sections for 'Validation' and 'Multiple Target References'. The second section, 'Child Components', contains three rows: 'Main' with a dropdown menu set to 'Node Editor' (highlighted with a red box) and a 'go to component' link; 'Buttons' with a dropdown menu set to '<Select a child comp' and a 'go to component' link; and 'Breadcrumb' with a dropdown menu set to '<Select a child comp' and a 'go to component' link.

6. In the Child Components > **Buttons** parameter, select Buttons, and click the **go to component** link.

This screenshot is a close-up of the 'Child Components' section from the previous image. It shows three rows: 'Main', 'Buttons', and 'Breadcrumb'. The 'Buttons' row has a dropdown menu that has been opened, showing 'Buttons' as the selected option (highlighted with a red dashed box). The 'Main' row has a dropdown menu set to 'Node Editor' and a 'go to component' link. The 'Breadcrumb' row has a dropdown menu set to '<Select a child comp' and a 'go to component' link.

7. In the Buttons Properties, click the **Add** button for the Child Components > Actions parameter. In the Add component dialog, select **Save Action**, and click the **Add** button to close the dialog.



Note that for end users, clicking Save will do one of two things. If the component is accessed from a non-address object, a new address object is created upon Save and referenced to the selected object. If the component is accessed from an address object, Save acts simply to save changes to the object. Additional information on the dual functions of the component can be found in the following sections.

8. No additional configuration of the Save button is required, but as with any action, it can be further configured by double-clicking on the action in the Actions parameter.

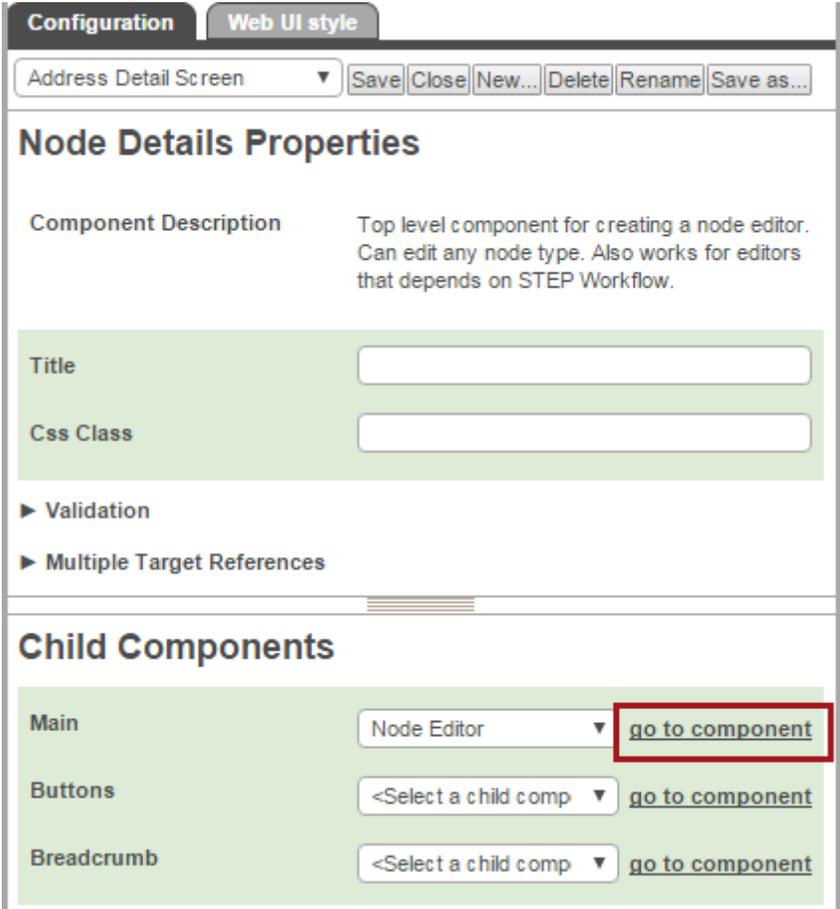
At this point you have created a place for the Address Detail component to be added, and added a Save button to that location, but have not yet added the component to your configuration. This is done via configuration of the Node Editor, described next.

# Configuring the Node Editor

Whether the Node Editor has been added to a Node Details screen directly, or as a child to a Tab Page, the below steps are applicable for configuring the Node Editor.

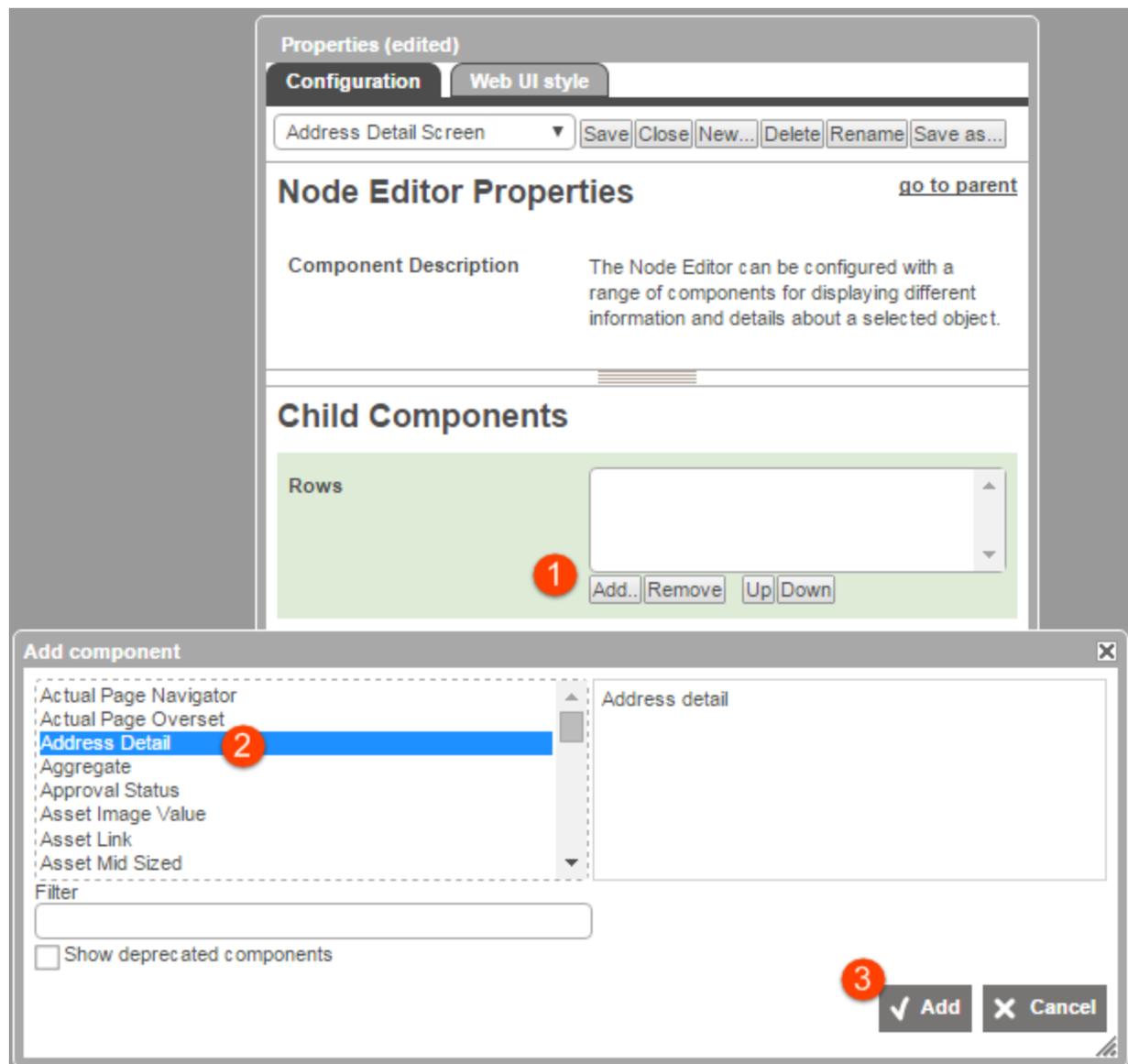
For simplicity, the steps below pick up where the above left off.

- 1. Navigate to the screen and component where you have added a Node Editor and click the **go to component** link to configure it.



- 2. In the Node Editor Properties, click **Add** to add a child component row, select the **Address Detail**

component from the Add component dialog, and click **Add**.

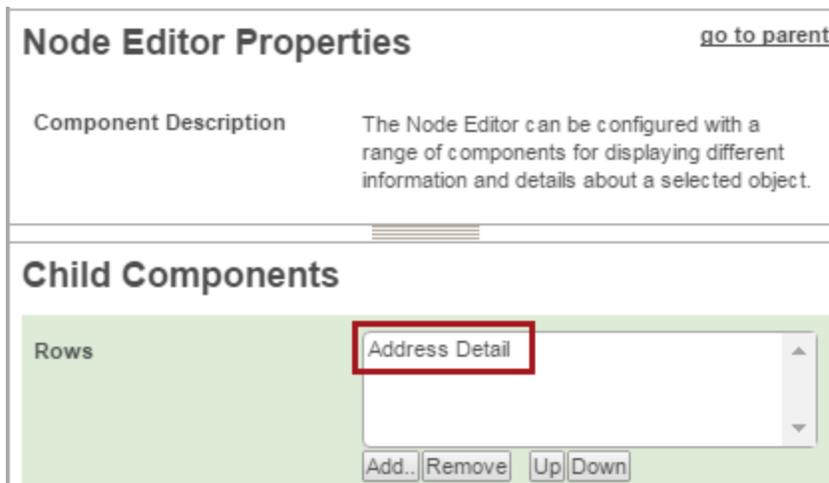


At this point you have added the Address Detail component to the configuration, but have not yet configured the component itself. This is done via configuration of the Address Detail component, described next.

## Configuring the Address Detail Component

The Address Details Properties must be configured before the Address Detail component can be used.

1. From the Node Editor, double-click on the Address Detail child component row to configure it.



2. This will open the Address Detail Properties. Standard parameters such as CSS Class and Label are available and can be configured if desired.

Properties

Configuration Web UI style

Address Detail Screen Save Close New... Delete Rename Save as...

### Address Detail Properties [go to parent](#)

Component Description Address detail

Css Class

Label

Object Type  ... Clear

Parameter Mapping

Add... Edit... Remove Up Down

Parent  Edit...

Reference Type  ... Clear

---

### Child Components

Rows

Add... Remove Up Down

3. The **Object Type** parameter should be configured by clicking the ellipsis and selecting the object type that has been configured for address objects on the system.
4. The **Parameter Mapping** parameter can be left blank.
5. The **Parent** parameter can be left blank or configured to use the Configured Address Detail Parent Handler. If left blank, each address object will be created under the selected object. This requires that the data model support child objects of the object type selected in step 3 and is used when address objects should be created as children to, for example, a customer object. If the Configured Address Detail Parent Handler option is selected, the properties dialog for this handler is automatically opened and a parent must be selected. This is used when all address objects should be created under a single parent and is used in the case where, for example, a flat hierarchy is used and all address objects exist under a single root node.

6. The **Reference Type** parameter should be configured by clicking the ellipsis and selecting a reference that has the address object type selected in step 3 as a *target* of the reference. In addition, the selected object must also be a *source* of the reference. To clarify, it must be understood that the Address Detail component can work in two ways. When accessed from an address object selection in Web UI, the component lets you edit the selected address. When accessed from a non-address object selection, e.g., a customer, the component creates a *new* address object and a reference between it and the selected object, using the reference type configured in this parameter. If the parameter is not configured with a valid reference that uses a valid source and an address object target, the component can only be used to edit existing addresses.
7. In Child Components > Rows, click the **Add** button and select **Address Detail Search** from the Add component dialog. This adds a field to the page so that users can type in an address to be searched via Google.
8. Optionally, in Child Components > Rows, click the **Add** button and select **Address Detail Map** from the Add component dialog. This adds an interactive map to the page so that users can drag and drop a pin to populate an address and/or see their searched address appear on the map. This configuration is optional and the component will function without its addition.
9. In Child Components > Rows, click the **Add** button and select **Attribute Value Component** from the Add component dialog. This step will need to be repeated several times so that all desired attributes are present. Typically this will include the attributes mapped in the Simple Address component model, as well as any other attributes on address objects that end users should have access to. For each attribute added, the Enable Tag Conversion parameter must be manually unchecked. Note that this component will not function properly if attributes are added via the Attribute Value Group component so care must be taken to add each individually using the Attribute Value component only.

Add component - configure required properties ✕

The Attribute Value Component component has required properties  
Required properties (\*) must be set before the component can be added to the configuration.

### Attribute Value Component Properties

**Component Description**      The Attribute Value component is used for displaying the value of an attribute for a selected object. Used in combination with a Node Details screen.

Attribute*	City
Enable Step Tags	<input type="checkbox"/>
Enable Tag Conversion	<input type="checkbox"/>
Label	<input type="text"/>
Label Css Class	<input type="text"/>
Mandatory	<input type="checkbox"/>
Max Suggestions	<input type="text"/>
Read Only	<input type="checkbox"/>

▶ LOV Options  
▶ Advanced

Note that configuration options are available to use an LOV attribute for Country, rather than a free text attribute. See the Address Detail Country LOV Attribute section of the Address Detail documentation for more information on this configuration.

A complete sample configuration of the Address Detail component is shown below, though note that only a subset of attributes can be seen in the Child Components > Rows field.

# Address Detail Properties

[go to parent](#)

Component Description      Address detail

Css Class	<input type="text" value="stibo-managed-node"/>
Label	<input type="text"/>
Object Type	<input type="text" value="CD_Address"/> ... Clear
Parameter Mapping	<div style="border: 1px solid gray; height: 40px; width: 100%;"></div> <input type="button" value="Add..."/> <input type="button" value="Edit..."/> <input type="button" value="Remove"/> <input type="button" value="Up"/> <input type="button" value="Down"/>
Parent	<input type="text" value="Configured Address Detail Parent Handler"/> ▼ <input type="button" value="Edit..."/>
Reference Type	<input type="text" value="CustomerToAddress"/> ... Clear

## Child Components

Rows	<div style="border: 1px solid gray; padding: 2px;"><ul style="list-style-type: none"><li>Address Detail Search (Search)</li><li>Address Detail Map</li><li>Attribute Value Component (Street Address)</li><li>Attribute Value Component (City)</li></ul></div> <input type="button" value="Add.."/> <input type="button" value="Remove"/> <input type="button" value="Up"/> <input type="button" value="Down"/>
------	--

At this point, the component is fully configured. However, as with any screen, it must be mapped appropriately in Main Properties > Mappings for end users to be able to access it.

Properties

Configuration Web UI style

---[MAIN]---

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

### Main Properties

**Component Description**

MAIN is used for configuring the overall behaviour of the Web UI. For example by setting up conditional mappings it is possible to decided the behaviour when navigating the Web UI. In addition the different side panels (left, right, top, bottom) and Corner bar can be configured on MAIN.

**Mappings**

- Potential Duplicates List (ObjectType = CD\_Contact)
- Address Detail (ObjectType = CD\_Customer)
- L4 screen (ObjectType = SalesItemFolder)
- productdetails (ObjectType = PackagingHierarchyR)

Add... Edit... Remove Up Down

# Address Detail Country LOV Attribute

To use a country attribute that has a List of Values (LOV) as the validation base type, careful consideration must be taken regarding the setup of the LOV and configuring the country attribute to display in Web UI.

CountryCode

## Setting Up the LOV and Country Attribute

**CountryISO - List of Values**

List of Values | References | Log | State Log | Tasks

**Description**

Name	Value
ID	CountryLOV
Name	CountryISO
Edited by	2016-03-08 15:58:50 by USER2
Path	Lists of Values / LOVs/CountryISO
Dimension Dependencies	
Use Ids on values	Yes
Use Ids for sorting	Yes
Value-ID Pattern	

**In Attribute Groups**

ID	Name
<a href="#">Add Attribute Group</a>	

**List of Values Validation**

Name	Value
Validation Base Type	Text
Allow Users to Add Values	No
Mask	
Minimum Value	N/A
Maximum Value	N/A
Maximum Length	100

**Values**

Values	Value ID
AQ	Antarctica
AT	Austria
BE	Belgium
BR	Brazil
CL	Chile
DE	Germany
DK	Denmark

[Add Value](#)

1. Log in to the workbench. User must have privileges to create and manage attributes and LOVs.
2. In **System Setup**, right-click on the List of Values / LOVs icon and choose **Create New List of Values**. At a minimum, make these selections:
  - Under Description, **Use Ids on values** must be set to Yes.
  - Under List of Values Validation, **Validation Base Type** must be set to Text.
  - Also under List of Values Validation, **Allow Users to Add Values** must be set to No.
3. Click on the **Add Value** link found under the Values section / flipper to begin entering the values and value IDs.
4. For each country, enter the country name as the Value ID and the desired display names / codes for Value.

Here is some important information to take into consideration as you set up the LOV values / value IDs.

- Users may want to use ISO 3166 country codes (alpha-2 or alpha-3) for global understanding and to also save time and avoid errors since a country name may change depending on the language being used.
- The Address Detail functionality takes the country results from an Address Detail Search field (powered by Google) and uses that information to auto-populate the country attribute field based on the LOV setup. **Country names must be typed into the LOV Value ID field exactly as shown in the Address Detail Search field.**
- Because the country name may change based on the locale / language of the end user, it is important to reiterate that the auto-populate feature for country will only work if the LOV value ID *exactly* matches the country name returned by Google. As an example, if the country search returns Danmark, then the country will not auto-populate if the value ID says Denmark. Danmark would need to exist as a value ID. If you have users using different locales but the same LOV, then both versions of the country name need to exist in the LOV for it to work as expected. Similarly, if value IDs are listed as UNITED STATES instead of United States or BRAZIL instead of Brazil, then the auto-populate feature will not work. Here is just an example of how the countries are listed based on English language / locale:  
<https://developers.google.com/maps/coverage>
- If a country is not listed as a country that is compatible with Google address search but the value is in the LOV, the user can manually select the value using the LOV dropdown.

## Configuring a Country Attribute Value Component

Important information when configuring / using a country attribute with a LOV validation base type to an Address Detail screen:

1. When adding the Attribute Value Component for the country attribute, disable / uncheck the **Enable Tag Conversion** parameter. If this parameter is enabled, the LOV dropdown will not display.
2. If the **Read Only** parameter is set, the dropdown becomes unavailable and the attribute field is uneditable by the end user. An admin may make this selection to keep a user from changing the country manually.
  - Read-only country attributes still use the LOV value ID / value combos, and the country value will continue to populate automatically.

<b>Address Details</b>	<b>Search</b>	11 Axel Kiers Vej, Højbjerg, , DK
	<b>Street</b>	Axel Kiers Vej 11
	<b>Street Name</b>	Axel Kiers Vej
	<b>Street Number</b>	11
	<b>City</b>	Højbjerg
	<b>State</b>	
	<b>CountryCode</b>	DK
	<b>Latitude</b>	56.1089327
	<b>Longitude</b>	10.162543700000015

- If the country is not listed in the LOV as a value ID, then while it appears on screen that the country value auto-populates, the user will receive an 'Invalid value' warning when attempting to save the data and it will not be saved.



<b>Address Details</b>	<b>Search</b>	Telfer WA 6762, Australia
	<b>Street</b>	
	<b>Street Name</b>	
	<b>Street Number</b>	
	<b>City</b>	Telfer
	<b>State</b>	WA
	<b>CountryCode</b>	Australia
	<b>Latitude</b>	-21.7102143
	<b>Longitude</b>	122.20535100000006

## Advanced Search

Creating and performing searches in Advanced Search can be a complex process for users with limited knowledge about the underlying data structure in STEP. For that reason, Advanced Search functionality in the Web UI is readily accessible for all kinds of users, including end users with limited STEP experience.

## Advanced Search Initial Configuration

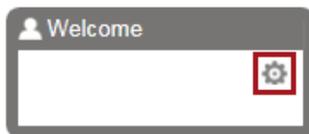
Advanced Search allows users to find specific data using search criteria that can be combined with other search criteria. Adding search operators (And, Or, and Exclude) further allows users to find the most relevant information to meet their needs.

The Advanced Search link can be added to the Web UI homepage for convenient user access. In addition, the search criteria panel itself is configurable so Web UI designers can present users with criteria relevant to their job.

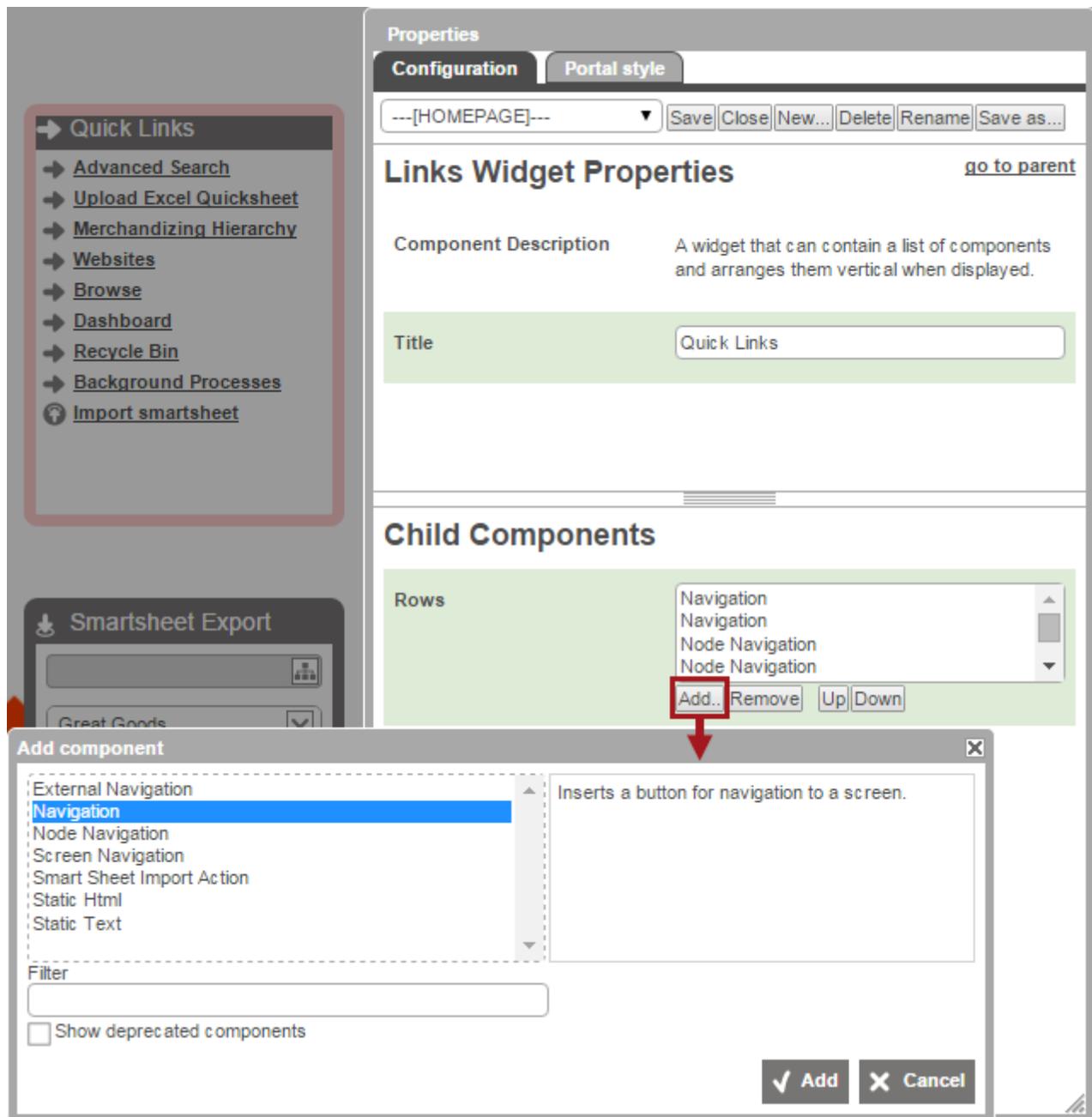
### Adding Advanced Search to the Homepage

To add a link to Advanced Search on the homepage:

1. Log into the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the homepage (in the user widget).



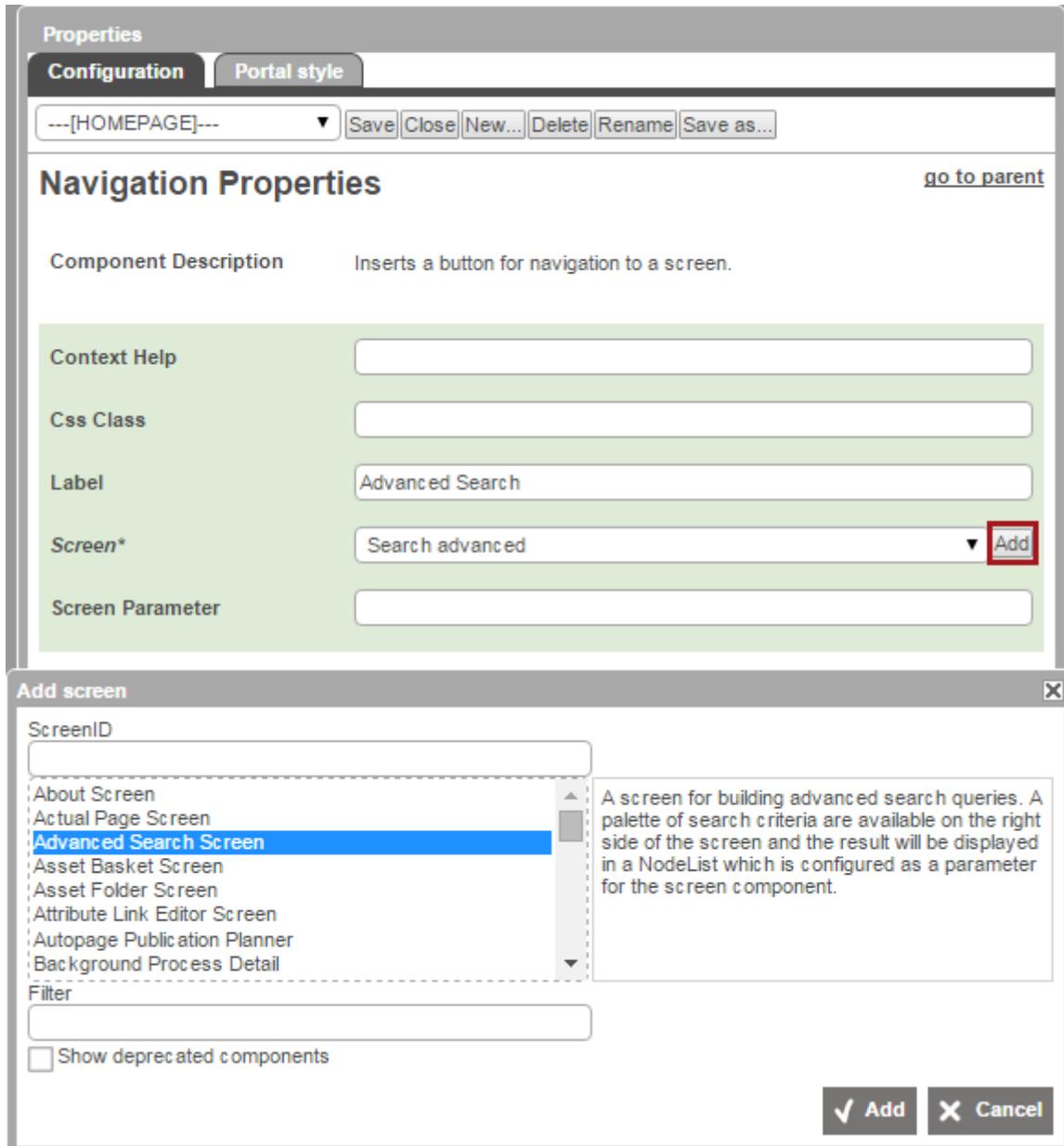
3. Click the links widget (titled Quick Links).
4. Go down to the Child Components section and click the Add button.



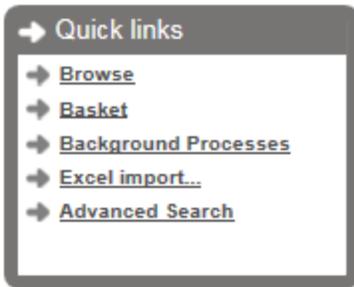
5. Choose the Navigation component and click Add.
6. On the Navigation properties screen, click the Add button to the right of the *Screen* field.
7. Select 'Advanced Search Screen' and input a ScreenID. Click Add.

The ScreenID you use should be something descriptive (e.g., Advanced Search or Search Advanced) since this will be the name shown on any design component list in the Web UI. ScreenIDs cannot be reused and must be unique.

8. Fill in the Label field with the name that will show on the links widget, then click Add.



9. You can move the Links widget Child Components up and down based on your preference for how they show on the homepage.
10. Click Save in the Properties Configuration dialog box.
11. The Advanced Search link will now show under Quick Links and is identified by the name you gave the link in Step 8.



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**Note:** Additional information regarding STEP Web UI Designer (entering design mode, selecting screens to edit, and more) can be found in the **Web User Interfaces / Getting Started** documentation.

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## Editing Advanced Search Properties

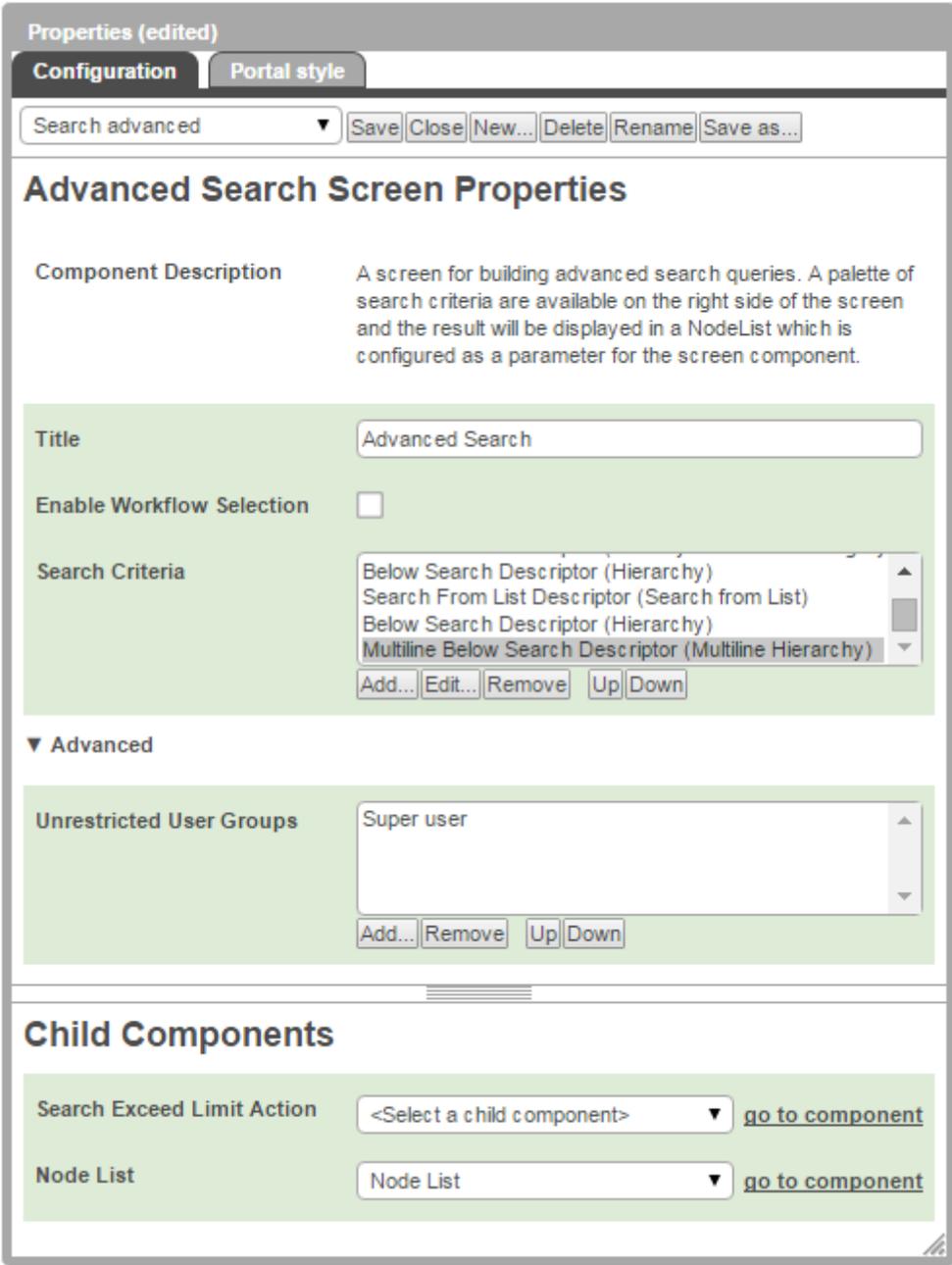
Admin users can configure Advanced Search to better meet their data / job needs. This includes modifying existing search criteria for a better user experience (e.g., relabeling a criteria with a more indicative title), and removing unused search criteria to lessen the risk of unintended and unrestricted searches.

Advanced Search properties can be edited at any time. However, it is best to configure the properties early on. Removing search criteria later may impact searches you have already built and saved. If removed, a criterion remains accessible through a saved search. However, the criterion will say 'No Title' and be unidentifiable to the end user.

## Getting to Advanced Search Screen Properties

1. Log into the Web UI. Again, user must have privileges to edit Web UI configurations.
2. Navigate to the Advanced Search screen (set up using the instructions above) and enter design mode from that page. Or, alternatively, enter design mode on the Homepage and use the screen dropdown to select the

Advanced Search screen ID.



**Enable Workflow Selection**

This parameter does not need to be enabled for setting up and running standard Advanced Searches.

However, if clicking on an object ID in the Advanced Search results set should route users to different display screens based on the workflow and state objects are in, then read more about the required setup for Forwarding Switch Screens in the 'Mapping Task List to Workflow State' section of the Web User Interfaces documentation.

## Adding Unrestricted User Groups

Initially, it is okay to leave this field blank. If there are no groups added, then all users will get access to the configured Advanced Search interface.

More details about restricting and sharing searches can be found in 'Restricting and Sharing Advanced Searches' of the Advanced Search section of the Web User Interfaces documentation.

## Modifying Search Criteria

Search criteria can be added (Add), removed (Remove), reorganized (Up / Down), and renamed (Edit) to meet specific needs. This allows an admin user to limit the number of search criteria (if some are unused) and rename all of the search criteria with more indicative titles to help end users better understand the intended use. Criteria can also be reordered to better suit business needs. Some criteria can be pre-configured to always use certain nodes, and it may be best to have more than one of these pre-configurable criteria set up in Advanced Search.

---

**Important:** Any criteria with a drop down menu allows for user to click on the dropdown and make a choice. No

manual typing can be done in those fields. Any place the  icon shows, click on it to expand the options and select / search nodes. Users may also start typing in any of those value boxes to see a list of available choices.

---

The available Search Criteria are listed below along with a description of each. The default criteria titles are shown, but these can be changed to something more meaningful to the end user.

- **Hierarchy and Multiline Hierarchy**

Search objects at or below a STEP Workbench Tree tab hierarchy node.

Using the Top Nodes section, these criteria can be configured to specify the exact data locations (hierarchy nodes) under which a user can search. Also, there can be more than one instance of the Hierarchy and Multiline Hierarchy under each set of search criteria. Each instance can point to different top nodes.

The Hierarchy search allows you to search under one node at a time. If the object you are looking for can be found under different nodes, the Multiline Hierarchy criteria can be used. Using the Multiline Hierarchy search criterion can make even highly specific searches less complex and easier to define.

Click on the Add button next to Top Nodes, and then click on a node by expanding / collapsing the folder structures as needed, or manually type in a selection (under Search). When picking multiple nodes, simply press the control button and click (ctrl-click) on each node. Save your choices and continue editing other search criteria or save the properties and exit out of design mode.

The screenshot shows a dialog box titled "Edit component" with a close button (X) in the top right corner. The main heading is "Hierarchy Properties". Below this, there is a "Component Description" section with the text "Search for objects below a selected hierarchy." The form contains a "Title" field with the value "Hierarchy" and a "Top Nodes" field which is currently empty. Below the "Top Nodes" field are four buttons: "Add...", "Remove", "Up", and "Down". At the bottom right of the dialog are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

The screenshot shows a dialog box titled "Edit component" with a close button (X) in the top right corner. The main heading is "MultilineHierarchy Properties". Below this, there is a "Component Description" section with the text "Select multiple nodes in the node picker to perform searches below multiple nodes. Type-ahead functionality is not supported if the name of more than one node has been entered." The form contains a "Title" field with the value "Multiline Hierarchy" and a "Top Nodes" field which is currently empty. Below the "Top Nodes" field are four buttons: "Add...", "Remove", "Up", and "Down". At the bottom right of the dialog are two buttons: "Save" (with a checkmark icon) and "Cancel" (with an X icon).

- **Attribute**

Search the Attribute Groups folder to narrow down what attribute you want to search. Attribute groups include metadata, category-specific attributes, business rules, and bound (to a STEP attribute) Workflow Variables. Once an attribute is selected, choose an operator then enter a value.

---

**Note:** The five operators to choose from are less than (<), less than or equal to (≤), greater than (>), greater than or equal to (≥), and equal to (=).

---

Two different wildcards can be used in any manual entry fields. These wildcards allow users to perform searches on partial text strings. The wild cards are asterisk (\*) and question mark (?). The asterisk (\*) represents any number of characters in a string, and the question mark represents exactly one character. Wildcard characters can go at the beginning, end, or middle of a search.

Examples of wildcard character usage are shown under the 'Name, ID and Attribute value search' section of this documentation.



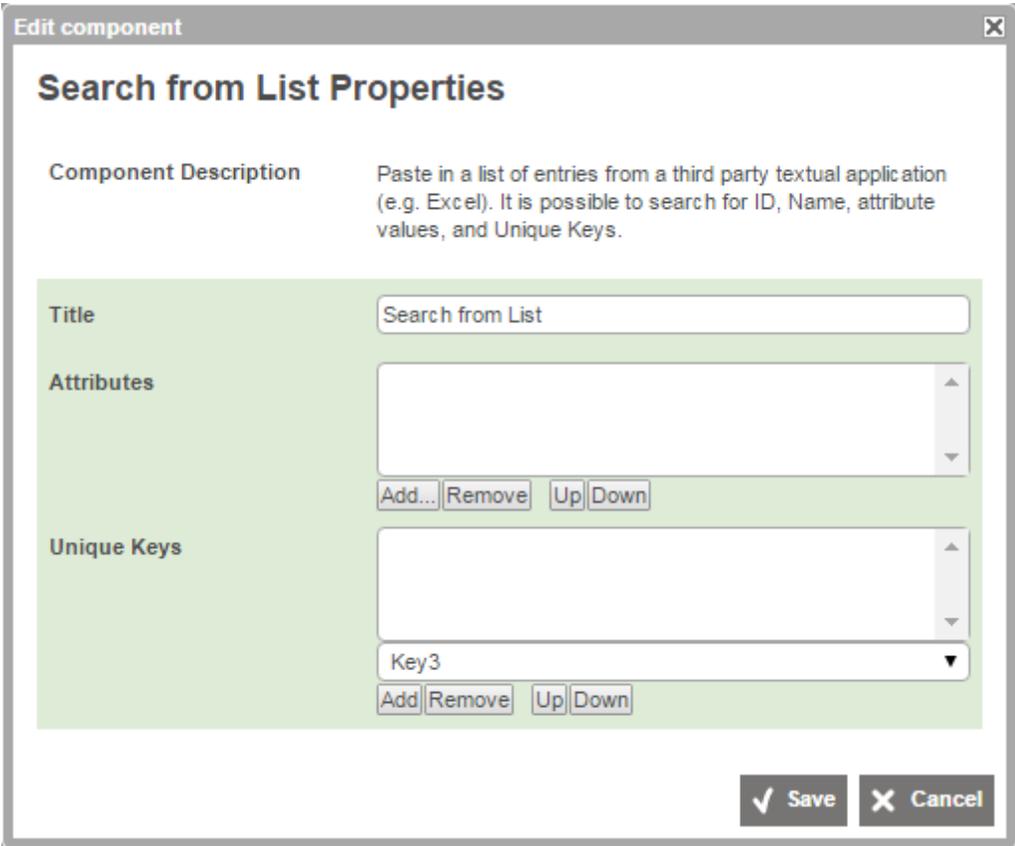
- **Object type**

Search through attributes, users, classifications, products, assets, entities, and other object types. 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.

- **Search From List**

Users may input a list of IDs and Names to search rather than searching through all system objects. Data can be entered manually or by pasting in data from another source such as an Excel spreadsheet or Smartsheet. Searches can be based on lists of IDs, names, attribute values, or unique keys.

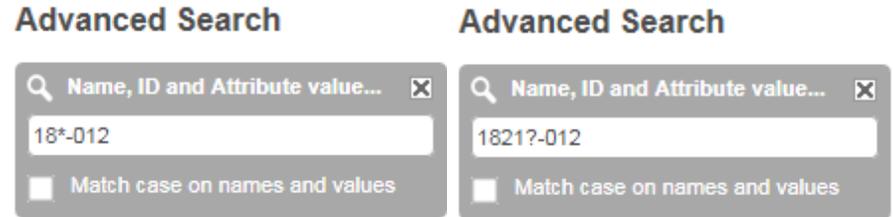
As an example, a product manager may own a certain set of SKUs. They only want to work with those objects, so they put in their list and (or set up the properties to) use that data - combining, if desired, with other search criteria - to identify specific projects needing work (e.g., in a particular workflow state or having a missing value for a mandatory attribute).



• **Name, ID and Attribute value search**

Search names, IDs, and attribute values. This parameter is very similar to the Search tab functionality in STEP Workbench.

Also, similar to the Attribute criterion, wildcard characters (\* and ?) may be used when searching. Check the 'Match case on names and values' option if applicable.



• **Approval status**

This criterion is used to identify objects that are not currently approved. These include classifications, products, images and documents, and entities setup to be Workspace revisable. There are three options to use: 'Never approved or modified in main,' 'Never approved,' or 'Modified in Main.'

• **Missing mandatory entries**

Search for product attributes and reference types that are required but missing. The mandatory attribute or reference type must be set as mandatory using standard methods. The Missing mandatory entries search works the same in Web UI as it does in STEP Workbench. Both are driven by Workbench mandatory settings.

This means that any attribute values marked as mandatory in just the Web UI (and not in STEP Workbench) will not show in the results. Also, mandatory workflow states and transitions will not show in the search results either.

In Workbench, mandatory items have a red checkmark on the validation base icon to the right of the attribute / reference name. For example: .

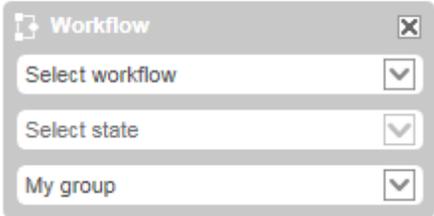
• **Workflow**

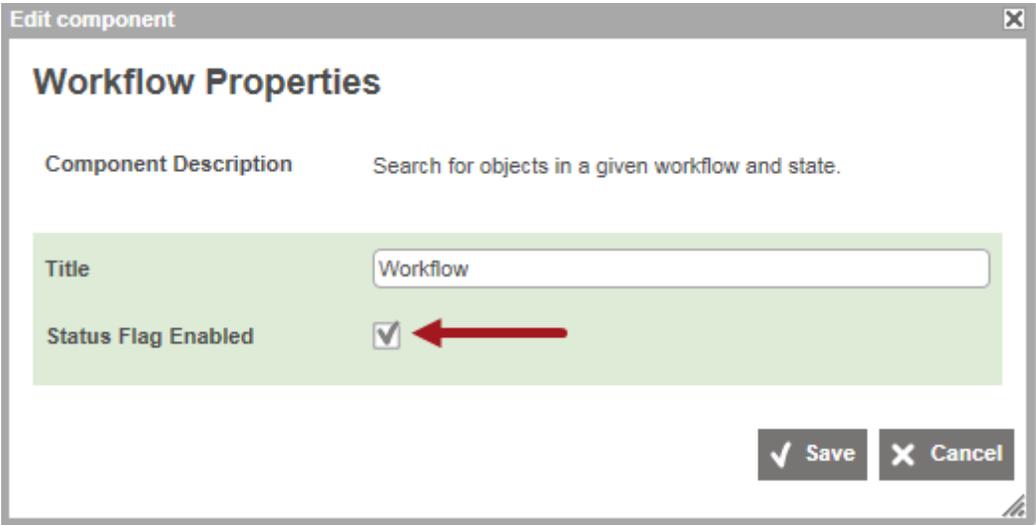
Workflows can be monitored using this criterion. Click on each dropdown menu and select a workflow, workflow state, state assignee, and status flag (if applicable and configured to display).

Choosing the '[any State]' state option allows for you to search the entire workflow, if choosing a specific state is not preferred. Choosing 'All' under the assignee field will allow for a broader search. Users may want to refine the search to see only workflow tasks that are directly applicable to them or their group.

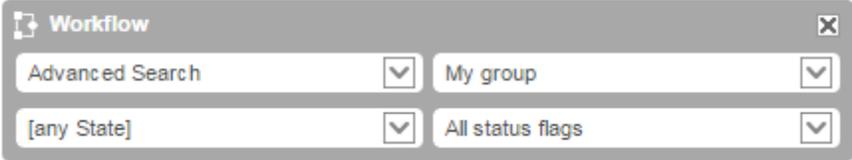
A status flag dropdown can be added to the Workflow criterion by checking the 'Status Flag Enabled' parameter within the Advanced Search Workflow Properties. When doing a search with the Workflow criterion, the status flag selector can be left as 'All status flags' if desired, or may be populated to restrict the search to only tasks with specific status flags applied.

**Advanced Search**





### Advanced Search



- **Referenced By and References**

As references are created, they accumulate more and more metadata. Search for an object by metadata on references from the object to other objects. This better supports the population and maintenance of metadata on references.

The Referenced By and References criteria work similarly. 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.

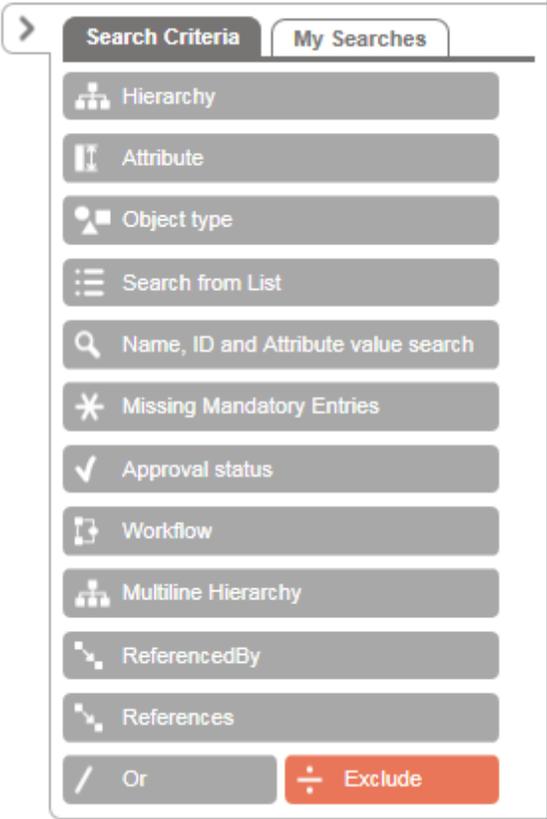
Once a reference type is entered, no additional options need to be filled in to start a search. Use the information at a high level or fill in the other values to drill down further (e.g., multi-supplier item references). Select a reference source under Referenced By and a target under References. Plus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



### Completed Search Criteria

The next screenshot shows an example of what the Search Criteria looks like under Advanced Search. The criteria properties have not been renamed in this example and each criteria is only used once.

Please note that the Or and Exclude operator fields are standard and cannot be removed or renamed.



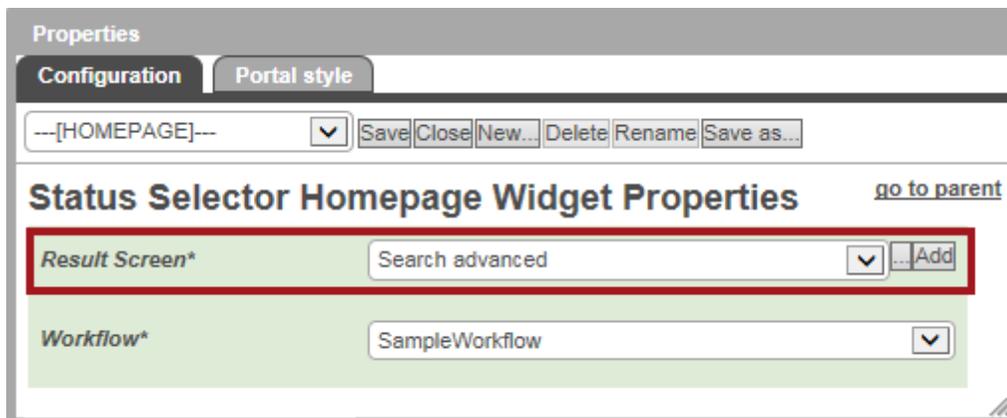
Advanced Search is now set up and ready for use.

## Mapping Task List to Workflow State

When properly configured, a user clicking on an object in an Advanced Search Task List will be routed to a specific screen designated for display of objects in the particular workflow and state that the object is currently in.

What follows is an example that a user can utilize as a starting point to complete their own configuration. The directions and screenshots are designed under the assumption that the user has already set up all the screens required.

1. Log in to the Web UI and enter design mode.
2. Navigate through the properties to get to the Status Selector you will be editing (either Status Selector Sidebar Widget via the Main Properties or the Status Selector Homepage Widget). The **Results Screen** for the applicable Status Selector should be set up to go to the Advanced Search screen. If not, make the selection and click Save.

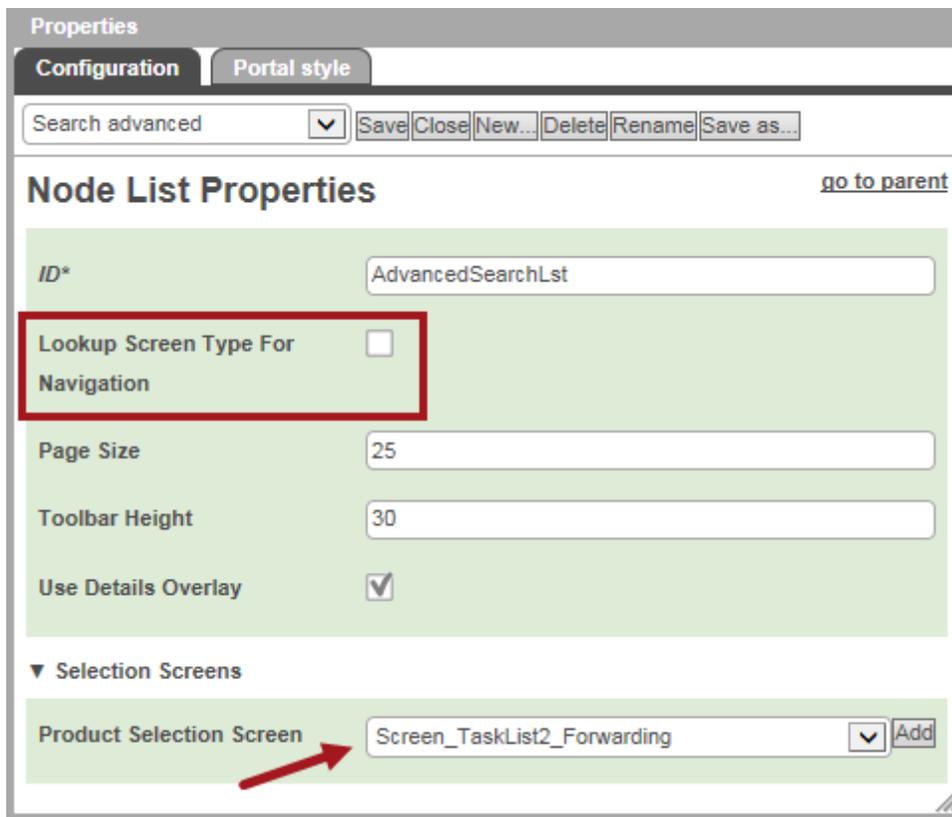


3. Select the Advanced Search Screen ID from the dropdown (it is Search advanced in the example below). Click the checkbox for the **Enable Workflow Selection** parameter in the Advanced Search Screen Properties. Save the selection before going on to the next step.

The screenshot shows a configuration window titled 'Properties' with two tabs: 'Configuration' and 'Portal style'. Below the tabs is a search bar with 'Search advanced' and a dropdown arrow, followed by buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main content area is titled 'Advanced Search Screen Properties' and contains several sections:

- Title:** A text field containing 'Advanced Search'.
- Enable Workflow Selection:** A checkbox that is checked, highlighted with a red rectangular box.
- Search Criteria:** A list box containing 'Missing mandatory entries (Missing Mand:', 'Referenced By (ReferencedBy)', 'References (References)', and 'Search from List ([SalesItemMarketingDes'. Below the list are buttons for 'Add...', 'Edit...', 'Remove', 'Up', and 'Down'.
- Advanced:** A section header with a right-pointing arrow.
- Child Components:** A section containing two rows:
  - Search Exceed Limit Action:** A dropdown menu with '<Select a child compo' and a 'go to component' link.
  - Node List:** A dropdown menu with 'Node List' and a 'go to component' link. A red arrow points to this link.

4. Stay on the Advanced Search Screen Properties screen, and click on the Node List 'go to component' link.
5. On the Node List properties screen, disable / **uncheck** the Lookup Screen Type For Navigation parameter. Save these changes.
  - If Lookup Screen Type For Navigation is **unchecked**, then the object screen selection that is defined under Selection Screens will be used as a target screen (e.g., Asset Selection Screen, Classification Selection Screen, Product Selection Screen, and Entity Selection Screen).
  - If Lookup Screen Type For Navigation is checked, then the screen mappings that are defined in the Main Properties screen are used when selecting the object from the Node List.

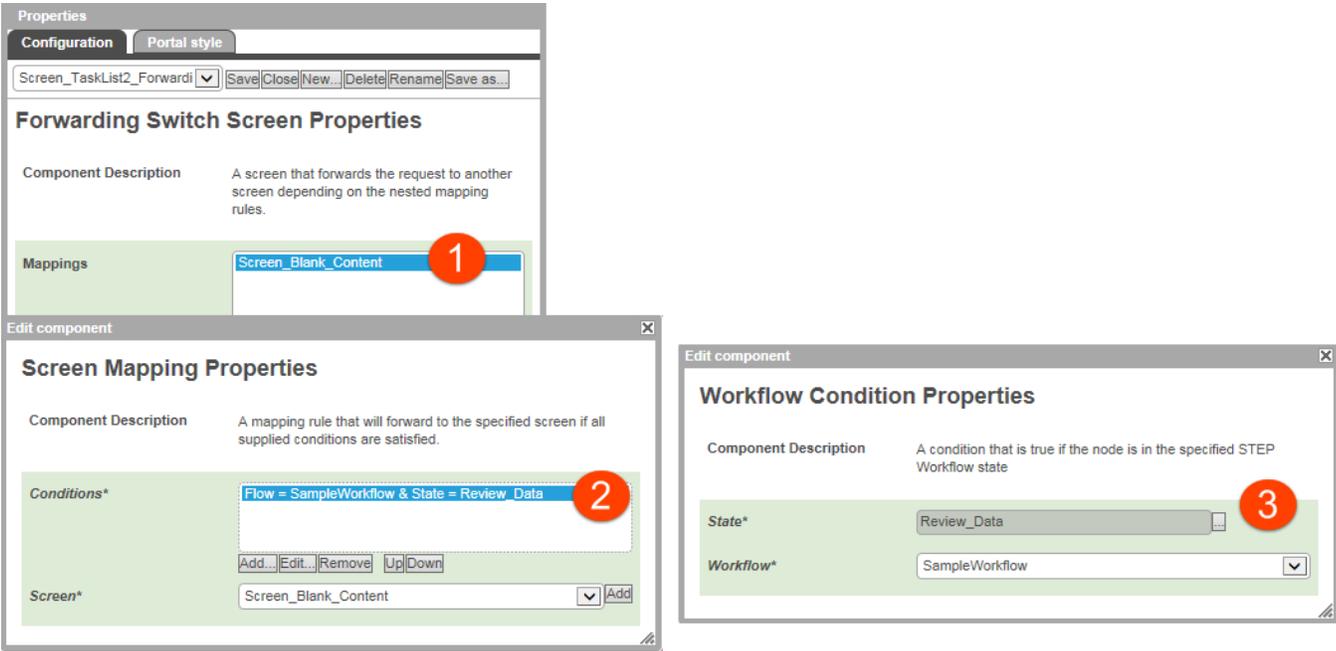


7. Select a Forwarding Switch Screen from the Product Selection Screen dropdown. Save the Node List Properties.
8. From the screen dropdown selector (to the left of the Save button), pull up the properties for the screen designated as the Product Selection Screen. In this example, it is the Screen\_TaskList2\_Forwarding screen.
9. In the Forwarding Switch Screen Properties, define the workflow condition that should show on the screen when selecting an object link within a Node List.
  - Click Add to add a mapping. This will open Screen Mapping Properties.
  - On Screen Mapping Properties, under the Conditions field, click Add.
  - Select 'Workflow Condition' from the component list and click Add.
  - Make a State and Workflow selection. Click Add again. Users should continue mapping any additional workflow states, if applicable, that will be going to the *same* screen. When done, click the dropdown for the Screen parameter and make a selection. Click Add.
  - Save the Forwarding Switch Screen Properties.
  - Repeat the steps in the previous bullets as needed.
  - Save any additional changes and close Web UI Designer.

---

**Important: If mapping is set up for one state in a workflow displayed using a Status Selector, mappings should be set up for all displayed states of the workflow to avoid end users seeing a 'No mapping found' message when clicking on an object ID in the results set.**

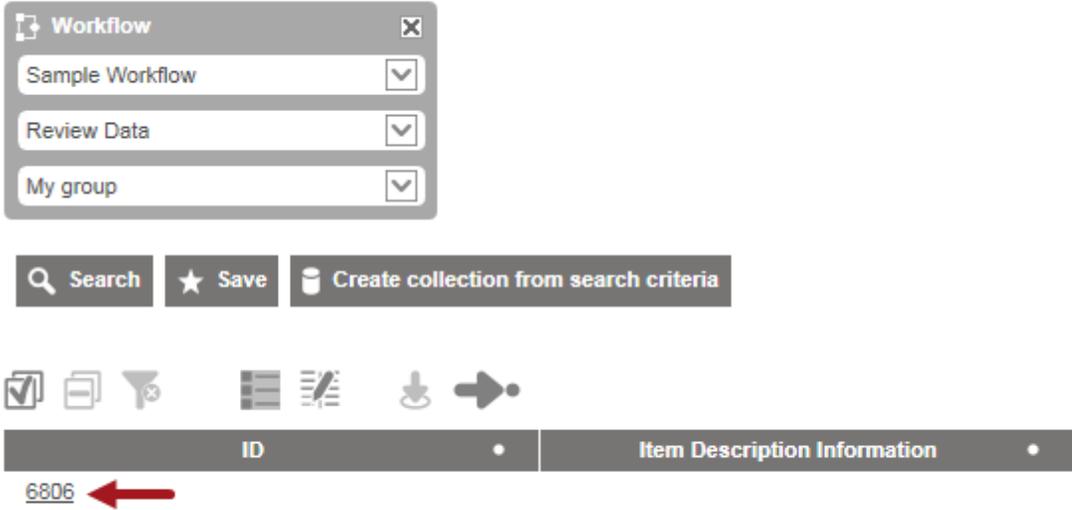
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The result is that when a user clicks on the a workflow state on the Status Selector, the results are shown in an Advanced Search Task List. When a user clicks on the ID for an object in the results set, the screen is redirected to the forwarding screen that is specified by the workflow condition.

In the example shown in the screenshots, when a user clicks on the Review\_Data state on the Status Selector, the result (ID 6806) is shown in the Advanced Search Task List. When the user clicks the 6806 ID link, the screen is redirected to Sample Workflow - Empty Screen. See the two screenshots that follow.

**Advanced Search**



Advanced Search

Workflow [X]

Sample Workflow [v]

Review Data [v]

My group [v]

Search Save Create collection from search criteria

Sample Workflow - Empty Screen



If an object is in more than one workflow, or in multiple states in the same workflow, a 'Select workflow state' dialog appears for the user to specify the state they would like to see the object in. Users need to make a selection or selections using the dropdowns that are active / available. The top dropdown is for workflow selection, and the bottom dropdown is for state selection.

Select workflow state [X]

The object '110969' resides in more than one active workflow state. Select workflow and state to see object in state

SampleWorkflow [v]

Review\_Data [v]

Don't show object in workflow state

OK Cancel

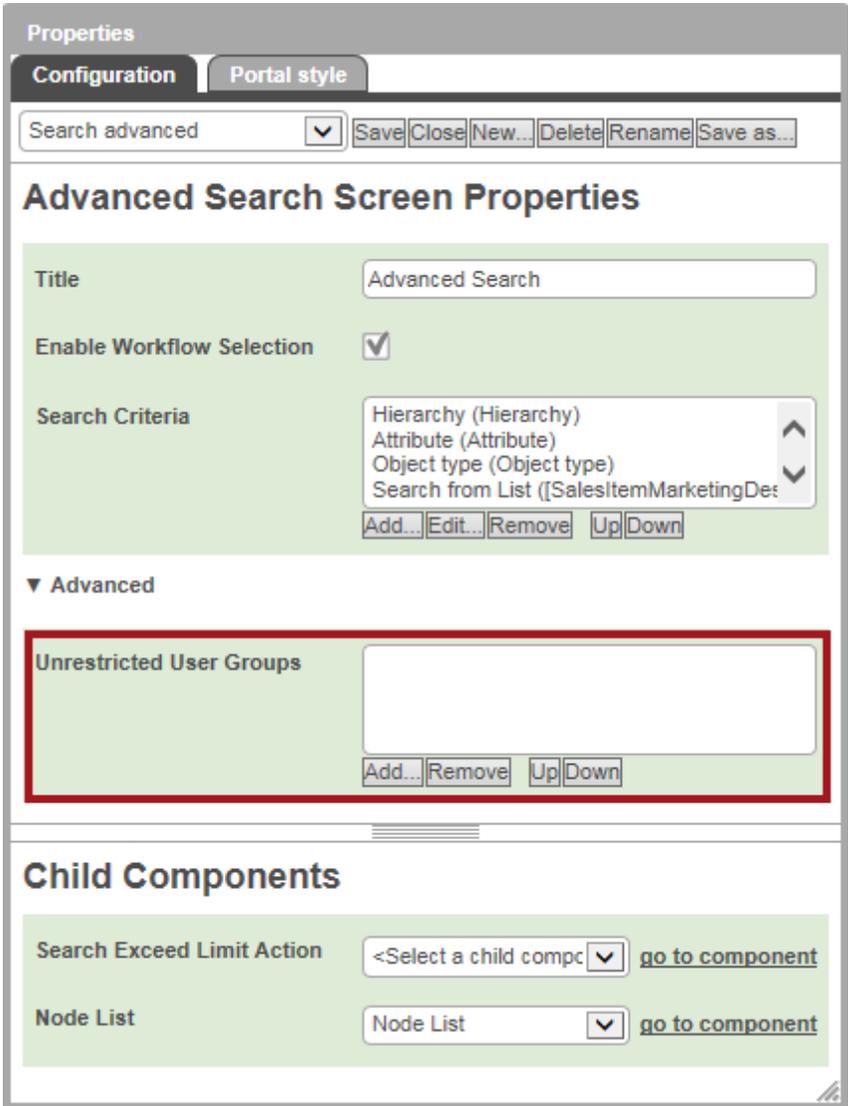
Once selections are made, the user clicks OK and is then redirected to the designated screen for the selected workflow state.

## Restricting and Sharing Advanced Searches

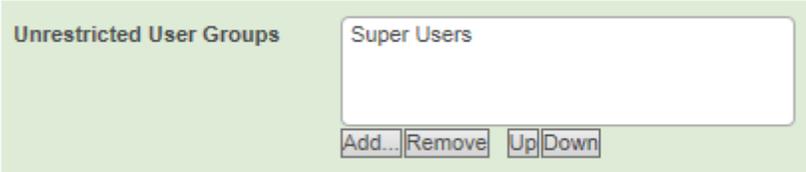
Creating and performing searches in Advanced Search can be a complex process for users with limited knowledge about the underlying data structure in STEP. For that reason, users with 'unrestricted access' (administrators) are able to pre-configure an Advanced Search in the Web UI and share it with other users. Experienced users can tailor Advanced Search to specific purposes and share with end users who do not have as much STEP experience.

### Restricting User Groups

1. Log into the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button  found on the homepage (in the user widget).
3. Click the Advanced Search link (e.g., if configured to display in the Quick Links widget) or navigate to the screen using the dropdown in the Web UI Designer window.



- 4. Click Add under **Unrestricted User Groups** and pick the applicable node from the selection menu.  
The admin - or anyone who will be creating and sharing the saved searches - needs to be added to the Unrestricted User Groups. All other groups are considered to be restricted and, therefore, cannot create and save Advanced Searches themselves.
- 5. In the next screenshot, the 'Super Users' group has been given Unrestricted User Group rights. This means that a member of the Super Users group will be setting up / sharing searches.



**Important:** If there are no groups added as Unrestricted User Groups, everyone will get access to the Advanced Search tab and the criteria. However, users who are not privileged to share searches will not be able to save searches. As soon as a group is added as an Unrestricted User Group, all other groups become restricted users until added as unrestricted. It is best to drop the Web UI admin group into this selection to avoid any issues that may come up if users with limited STEP experience try an all-encompassing search using large amounts of data.

## Applying a Share Search Action Set

First, a 'Share search with group' action will need to be created if it doesn't already exist as a standalone item or as part of an existing Action Set.

1. Go to **System Setup** in the STEP Workbench.
2. Under Action Sets, right-click User Actions and add a New Action Set.
3. Type in an ID and Name then click Create. In this example, the name is 'Share Search.'
4. Click on the new action set that was just created. Go to the Action Set tab.
5. Click on the Add Action link and select 'Share search with group.'

The screenshot displays the 'Share Search - Action Set' configuration page. At the top, there is a navigation bar with a back arrow and the title 'Share Search - Action Set'. Below this, there are two tabs: 'Action Set' (selected) and 'Log'. The main content area is divided into two sections: 'Description' and 'Actions'. The 'Description' section contains a table with the following data:

Name	Value
ID	ShareSearch
Name	Share Search
Action Type	User Action

The 'Actions' section has a dropdown menu with 'Actions' selected and an 'Add Action' link below it. A 'Select Action' dialog box is open, showing a list of actions with checkboxes. The 'Share search with group' action is checked. The dialog box also has 'Select' and 'Cancel' buttons at the bottom.

Next, the user or group that has unrestricted Advanced Search Web UI access, typically Web UI administrators, will need to have updated Privilege Rules before being able to share pre-configured searches.

In the following example, Super Users is the unrestricted group. And Buyer Group is the user group that will be able to access the shared search(es).

6. Under **System Setup** in the STEP Workbench, go to Users & Groups. Click on the group that will have unrestricted privileges in the Web UI Advanced Search configuration.
7. On the Privilege Rules tab, click on Add Privilege found under User Privileges (expand the flipper, if needed). Specify the user or group that the admin will share searches with (in the Apply to User group section). For Action Set, pick the action set that was created in Step 3 (Share Search). The user group with unrestricted privileges should be listed for Apply to Group.

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**Important:** The 'Privilege' to share pre-created searches should be added to the group who will be setting up the searches and sharing them, not to the user or group who will receive the shared searches.

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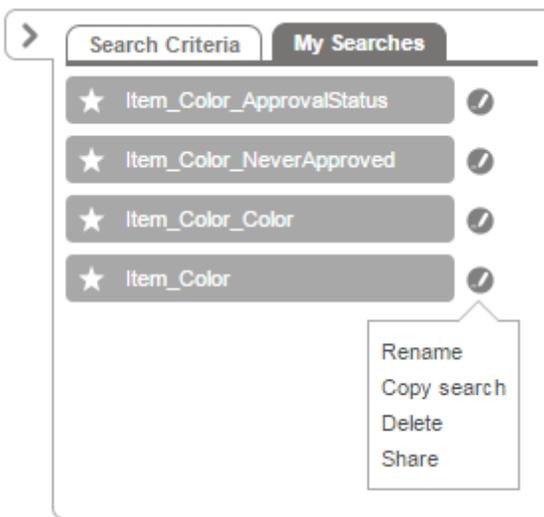
8. Click Save.

Setup in the STEP Workbench is now complete.

The group or groups designated as Unrestricted User Groups may run searches and also create searches, save them, and share with the user(s) designated in the Workbench as privileged users.

## Sharing Saved Searches

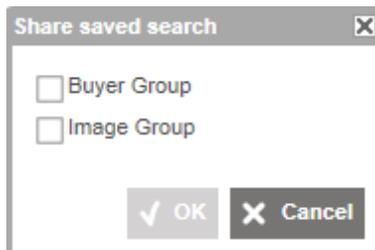
The administrator (unrestricted user) will need to log in to the Web UI to create an Advanced Search or access an existing saved search. Saved searches can only be shared with the privileged users. See the 'Applying a Share Search Action Set' section in this documentation.



To share a saved search, the administrator (a member of the Unrestricted User Group) can click on the  icon to the right of each saved search to see the options available:

- Rename - change the pre-configured search name and resave
- Copy search - make a copy of an existing search that can then be edited and renamed
- Delete - remove the saved search from the list
- Share - make the saved search available for a (privileged) user

When the Share link is clicked, a menu of available users / groups is shown.



Make a selection and click OK. The user / group picked will have the saved search available under the Advanced Search My Searches tab the next time they access and/or refresh their Advanced Search page.

User groups without explicit access to create, share, save, and maintain advanced searches will experience a redesigned layout that is more simplistic and user friendly when they access the Web UI Advanced Search. End users who receive shared searches will not have the Search Criteria tab in Advanced Search. They will only see the 'My Searches' tab. In addition to increasing usability, this also reduces the risk of broad searches being unintentionally performed and depleting system resources.

End users cannot change or move the parameters of a saved search. However, they may change the values within a search, even if the search is already pre-configured with values.

**Advanced Search** English US Main

**Object type**  
Item (Item) AND

**Attribute**  
Color (Color) = Orange

OR

**Object type**  
Item (Item) AND

**Attribute**  
Color (Color) = White

**Approval status**  
Never approved  
 Status in current context

Search Create collection from search criteria

ID	Item Description Informal	Item Supplier Information	Item Manufacturer Inform.
109242			
18213			
18216			
21882			

1-5 of 5

## Considerations and Limitations

- Unrestricted user groups will see two tabs - 'Search Criteria' and 'My Searches.' Restricted users who have been set up to receive shared searches will only have the 'My Searches' tab.
- If there is an exclude operator  in a saved search, the word 'exclude' does not show on the screen. The end user should be familiar with the symbol so they understand the search process and results.
- Only one search can be used at a time. Saved searches cannot be combined on the screen in any way.
- End users may receive shared searches from multiple administrators.
- Administrators cannot see each other's saved searches unless one admin shares with another or shares with the entire admin group. The admin group or a particular admin user would need to be set up to receive searches. For more information, see 'Advanced Search Initial Configuration' in the Web User Interfaces documentation. If one admin shares a search with another admin / admin group, the shared search can only be copied (not deleted, renamed, or shared) by the receiving admin user(s).
- If an administrator deletes a saved search from their own account, the search is deleted across the board. End users will no longer find that search under the 'My Searches' tab.

## Using Advanced Search

Once Advanced Search has been configured (e.g., criteria renamed, unused criteria removed, hierarchy nodes pre-selected and added), the search is ready to use.

### Performing an Advanced Search

Drag and drop each search criteria button and operator button over to left side of the page. Or simply click on each search criteria button to build the search. Building search queries visually helps the user better understand the data.

### Building a Search Query

1. Chose the Search Criteria by dragging and dropping each search criterion over to the left side of the screen or by simply clicking the desired search criteria button.
2. Click / drag and drop the Or and Exclude operators as needed. The default operator is And.
3. When all the criteria are set up, click Search. Results will show at the bottom of the page.

Here are three screenshots that show some basic searches with different operators: **And**, **Or**, and **Exclude**.

---

**Note:** The example screenshots do not show every search criteria available. For more information on adding / removing criteria shown to users, see 'Advanced Search Initial Configuration' in the Web User Interfaces documentation.

---

**Example 1:** Object type (Item) **And** Attribute (Color=Orange)

Results include items that have the color 'Orange' as an attribute value.

**Advanced Search**

Object type: Item (Item) And

Attribute: Color (Color) = Orange

Search Criteria: Hierarchy, Attribute, Object type, Search from List, Name, ID and Attribute value search, Missing Mandatory Entries, Approval status, Workflow, Multiline Hierarchy, ReferencedBy, References, Or, Exclude

Search Save Create collection from search criteria

ID	Item Description Info	Item Supplier Inform	Item Manufacturer In	Status flag
<a href="#">109242</a>				
<a href="#">18213</a>				
<a href="#">18216</a>				
<a href="#">21882</a>				
<a href="#">22126</a>				

1-5 of 5

**Example 2:** [Object type (Item) **And** Attribute (Color=Orange)] **Or** [Object type (Item) **And** Attribute (Color=White)]

The search pulls items that have the color 'Orange' as an attribute value and combines those results with items that have the color 'White' as an attribute value.

**Advanced Search**

Object type: Item (Item) [And]

Attribute: Color (Color) = Orange

Or

Object type: Item (Item) [And]

Attribute: Color (Color) = White

Search Criteria: Hierarchy, Attribute, Object type, Search from List, Name, ID and Attribute value search, Missing Mandatory Entries,  Approval status, Workflow, Multiline Hierarchy, ReferencedBy, References

Search Save Create collection from search criteria

ID	Item Description Info	Item Supplier Inform:	Item Manufacturer In	Status flag
<a href="#">109242</a>				
<a href="#">18213</a>				
<a href="#">18216</a>				
<a href="#">21882</a>				
<a href="#">22126</a>				

1-7 of 7

**Example 3:** [Object type (Item) **And** Attribute (Color=Orange)] **Or** [Object type (Item) **And** Attribute (Color=White) **Exclude** Approval status (Never approved)]

The search pulls items that have the color 'Orange' as an attribute value. And combines those results with items that have the color 'White' as an attribute value with any object types that have never been approved excluded from the Item / Color=White results.

**Advanced Search**

Object type: Item (Item) [And]

Attribute: Color (Color) = Orange

Or

Object type: Item (Item) [And]

Attribute: Color (Color) = White

Approval status: Never approved

Status in current context:

Search Criteria: Hierarchy, Attribute, Object type, Search from List, Name, ID and Attribute value search, Missing Mandatory Entries, Approval status, Workflow, Multiline Hierarchy, ReferencedBy, References, Or, Exclude

ID	Item Description Info	Item Supplier Informz	Item Manufacturer Int	Status flag
109242				
18213				
18216				
21882				
22126				

In Example 3, if the user also wants to exclude unapproved object types from the Item / Color=Orange portion of the query, they would go back and add the **Exclude** operator and the 'Approval status (Never approved)' criteria in front of the **Or** operator.

**Note:** When a user clicks on the 'x' to remove an Exclude or Or operator symbol, the system changes it to And. To entirely remove a particular operator, remove the search parameters that come after that operator.

Building searches within the Web UI is very similar to the functionality found within the STEP Workbench Search tab. For additional information on this process, go to the STEP Documentation and refer to Getting Started, Navigation and Searches.

## Saving a Search

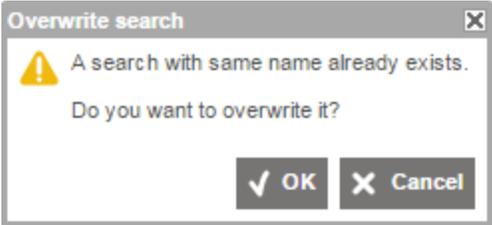
When an Advanced Search is built, a user may want to save the search to use again. Searches can be saved once parameters have been added. There is no need to run a search before saving it. However, it is a good idea to make sure the designated criteria are set up effectively and meet data / business needs prior to saving.

Values may be pre-populated for each search parameter prior to saving.



Click Save and name the search. Press OK to save it.

If saving a new search using a name that is already used by an existing saved search, an overwrite notification will appear and require user action. If overwriting a search that has been previously shared, the search is overwritten for all users.



## Using Saved Searches

Access saved searches by clicking on the 'My Searches' tab.



Drag and drop the gray button to the left side of the screen to open a saved search. Or, simply click on the applicable search name. To complete the search, click the Search button. The results will show at the bottom of the page. If there are no results returned, a zero (0) will show at the left, bottom corner of the page.

The screenshot shows the 'Advanced Search' interface. It features two search criteria sections, each with 'Object type' (Item) and 'Attribute' (Color) filters. The first criterion is set to 'Orange' and the second to 'White'. There is also an 'Approval status' filter set to 'Never approved'. A 'My Searches' sidebar on the right lists saved searches. At the bottom, a table displays search results with columns for ID, Item Description, Item Supplier Information, and Item Manufacturer Information. A red box highlights a horizontal splitter control with up and down arrowheads, and a red arrow points to the pagination controls showing '1-5 of 5'.

ID	Item Description Informal	Item Supplier Information	Item Manufacturer Inform.
<a href="#">109242</a>			
<a href="#">18213</a>			
<a href="#">18216</a>			
<a href="#">21882</a>			

## Collapsible splitter feature

The individual panels on the Advanced Search screen are collapsible and expandable through the use of a collapsible splitter feature (shown in the preceding screenshot).

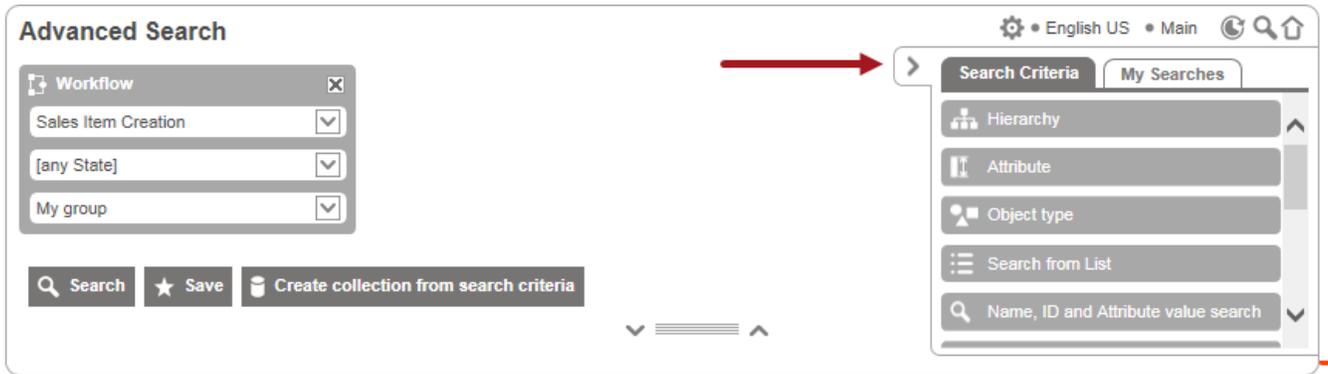
When the screen is configured with a horizontal split panel, a drag handle splits up the panels / components on the screen. The drag handle displays a down arrowhead to the left and an up arrowhead to the right.

Clicking the up arrowhead removes the main component (Advanced Search build / criteria) from display, allowing more screen space to focus on the Node List. This is useful if the user wants to focus on the results set only. For example, a user may choose to display the results set in Multi Edit Display Mode to make edits and no longer needs to see the criteria or the way the search was built.

Clicking the down arrowhead returns the hidden component back to the screen display.

Similarly, if the user first clicks the down arrowhead, the child component is hidden from display so the user can focus on using the criteria and setting up an Advanced Search.

**Note:** By default, the collapsible splitter is typically in the middle of the screen and the Search Criteria panel / tab is automatically displayed once a user is on the Advanced Search screen. However, if the Advanced Search Task List is used as a result screen for any Status Selector Widget, the criteria panel is collapsed and the splitter moves up under the search criteria used in the search. This allows more room to view the Task List once a user gets on the Advanced Search page. The Search Criteria panel can be expanded by clicking the arrowhead on the right of the screen (shown expanded in the following screenshot) and the splitter can manually be dragged down to expand the Search Criteria list and area, if desired.



## Considerations and Limitations

- Unrestricted user groups will see two tabs - 'Search Criteria' and 'My Searches.' Restricted users who have been set up to receive shared searches will only have the 'My Searches' tab. Read more in the 'Restricting and Sharing Advanced Searches' section of the Web User Interfaces documentation.
- If there is an exclude operator  in a saved search, the word 'exclude' does not show on the screen. The end user should be familiar with the symbol so they understand the search process and results.
- Only one search can be used at a time. Saved searches cannot be combined on the screen in any way.
- Non-admin users cannot change or move the parameters of a saved search. However, they may change the values within a search, even if the search is already pre-configured with values.

# Attribute and LOV Creation and Maintenance in Web UI

Attributes and LOVs can be created and maintained in Web UI, similar to STEP Workbench. The intent of this functionality in Web UI is to provide access for basic management of attributes and LOVs. With that in mind, some of the more advanced features available in workbench are unavailable, or available in a reduced manner, within the Web UI.

This section of the documentation describes how to configure and work with attribute and LOV management functionality in Web UI.

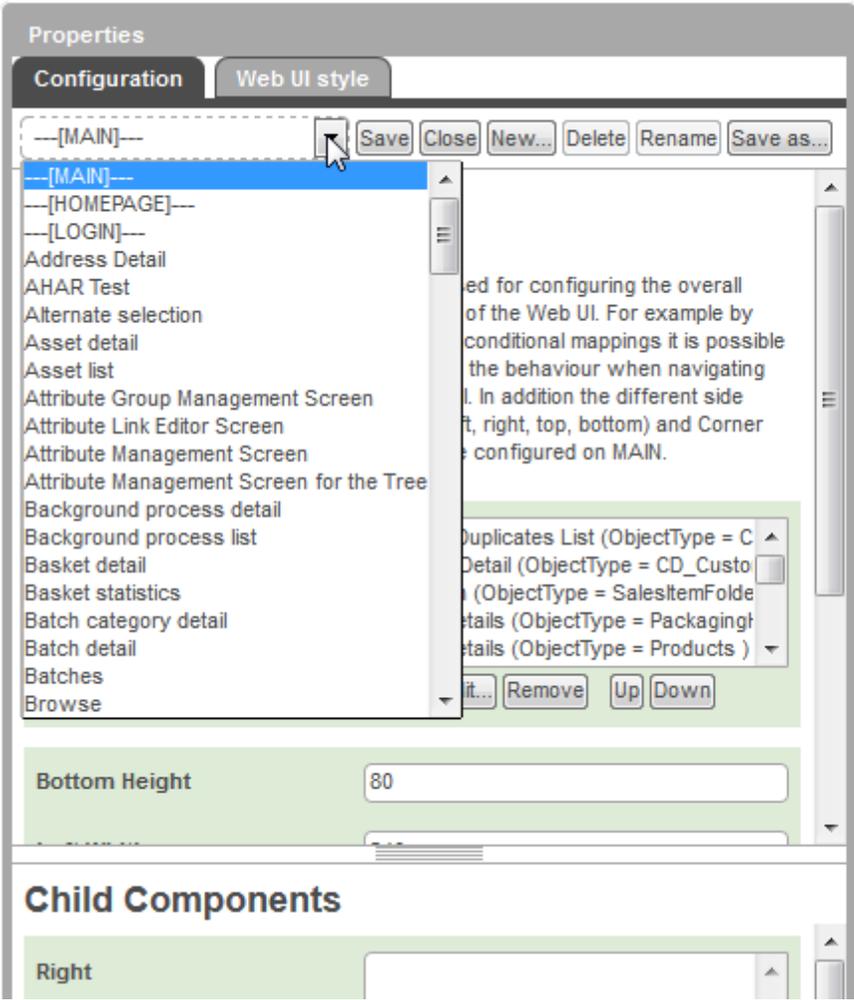
# Attribute and LOV Creation and Maintenance Configuration

Attributes, attribute groups, Lists of Values (LOVs), and LOV groups can be created and maintained in the STEP Web UI by accessing one of four screens. The screens, however, cannot be accessed without some basic configuration to enable those screens. In this topic, the step-by-step configuration for that initial setup is described. The screens (**Attribute Group Management screen**, **Attribute Management screen**, **List of Values Group Management screen**, and **List of Values Management screen**) are described in the sub-topics located after this one.

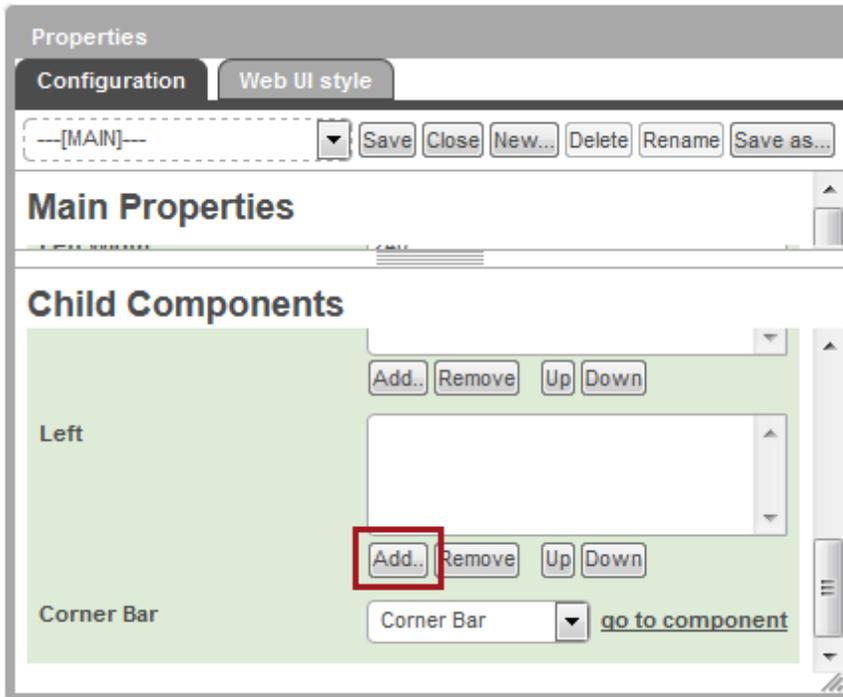
## Adding the Stack Panel

In order to make attributes, attribute groups, LOVs and LOV groups accessible in the Web UI, the user must first add the **Attribute Group** and **List of Values Group** root nodes to the left navigation area, or **Stack Panel**, as a stack panel element. Before these nodes can be added, the Stack Panel must first be added in Web UI. If a user already has a left navigation element, they should skip ahead to the **Configuring the System Setup element in Web UI** section below. If the user's Web UI does *not* have a left navigation element, the following steps should be taken:

1. Once logged into the Web UI, open the Designer, and select **[MAIN]** from the dropdown screen menu.

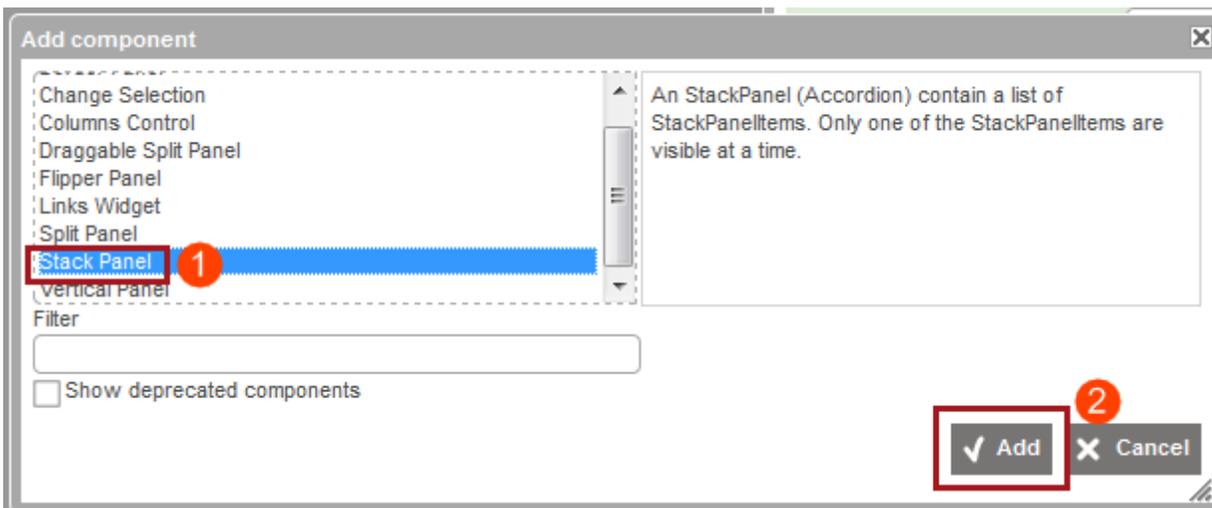


- 2. Under Main Properties, scroll down to the **Left** field in the **Child Components** section, and click the **Add** button.

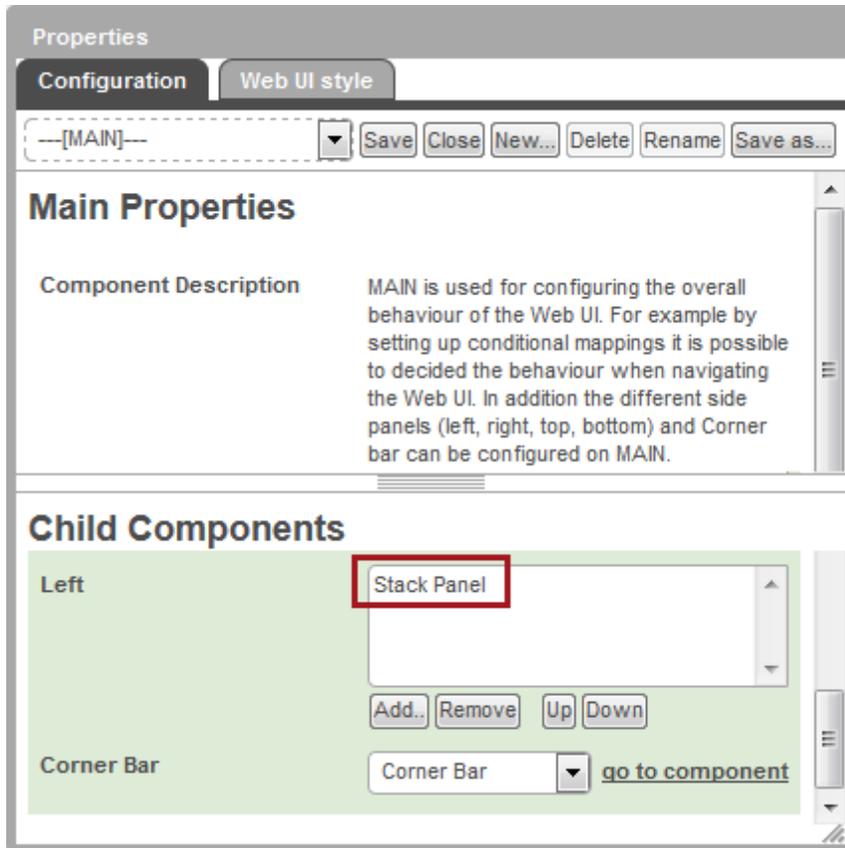


**Note:** It is also possible to configure access to these screens in a *right-screen* stack panel element, depending on the designer's preference.

3. In the **Add component** window, select **Stack Panel** and click the **Add** button. (Double clicking **Stack Panel** will accomplish the same goal.) This action adds the left navigation element to the Web UI screen.



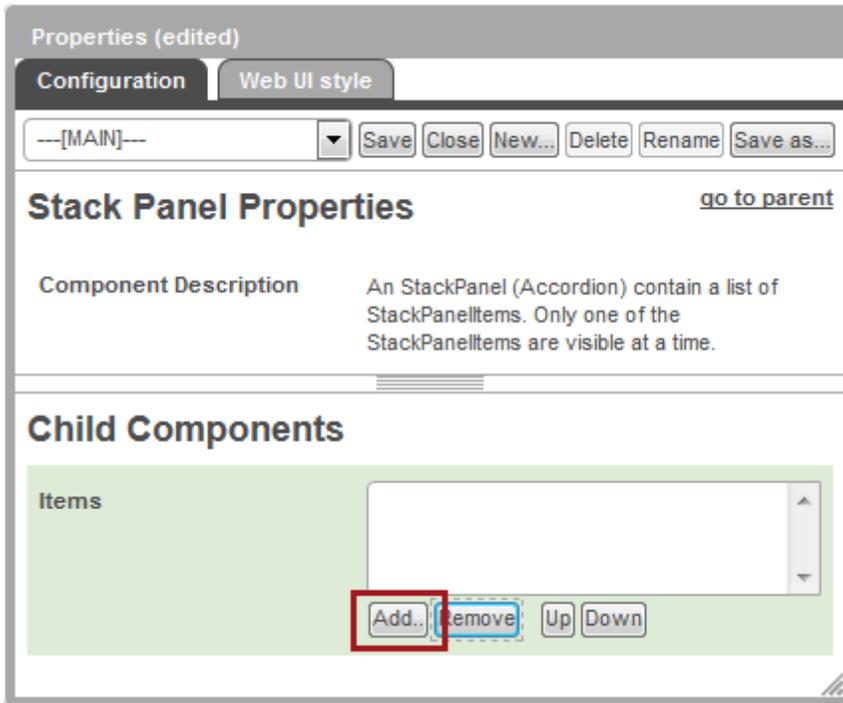
4. Double click the **Stack Panel** component that was just added. This will take the user into the **Stack Panel Properties** screen in order to begin adding the required components.



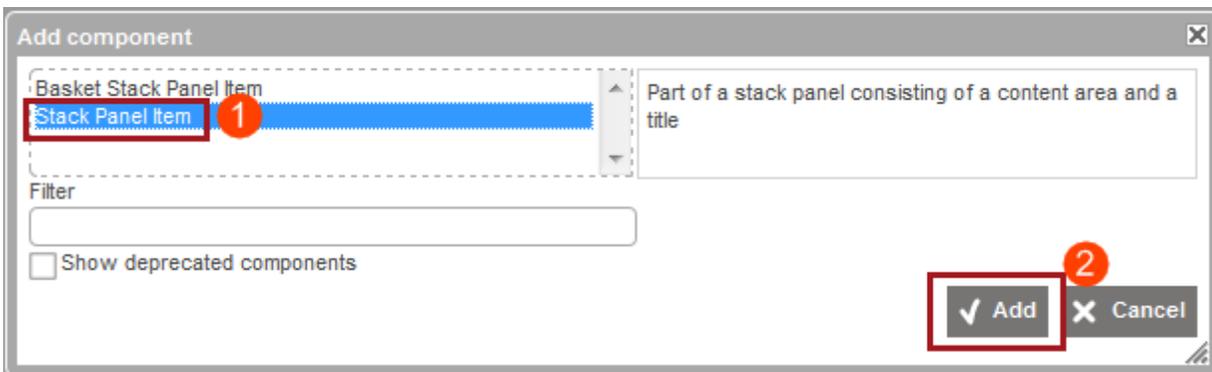
## Configuring the System Setup element in Web UI

To add Attribute and/or LOV hierarchies to a stack panel, follow the steps below.

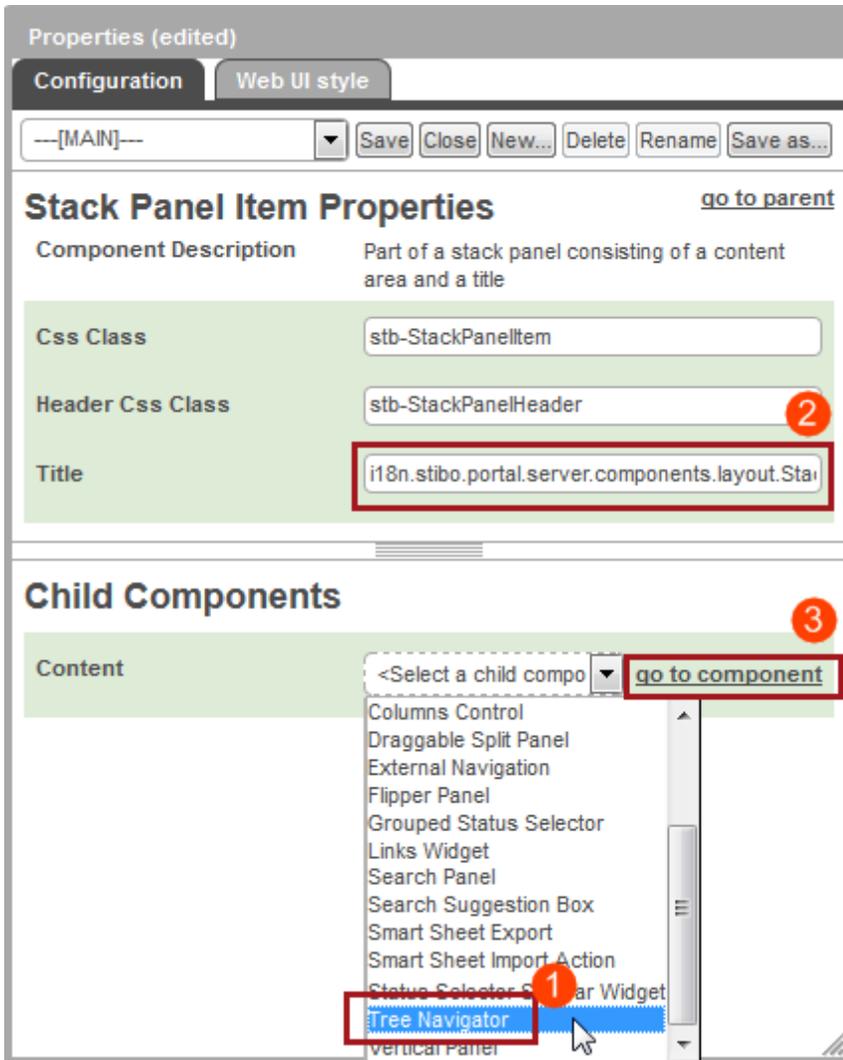
1. In the **Stack Panel Properties** window, click the **Add** button located beneath the **Items** field in the **Child Components** section.



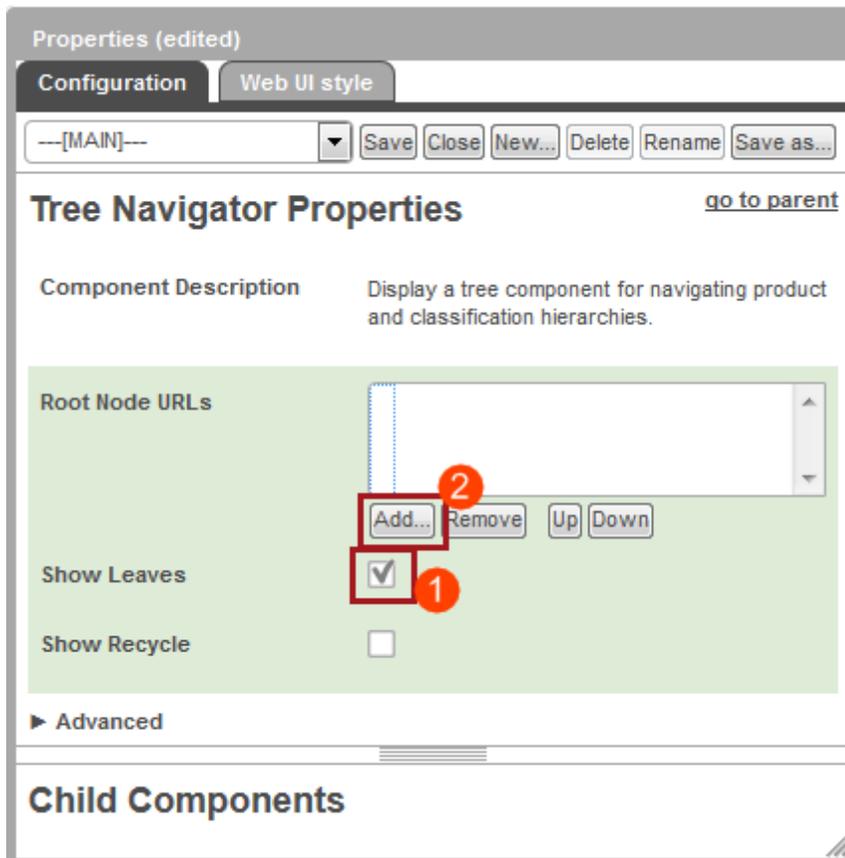
2. In the **Add component** dialog that appears, select **Stack Panel Item** and click **Add**. Once added, double click the new **Stack Panel Item** to navigate to its configuration.



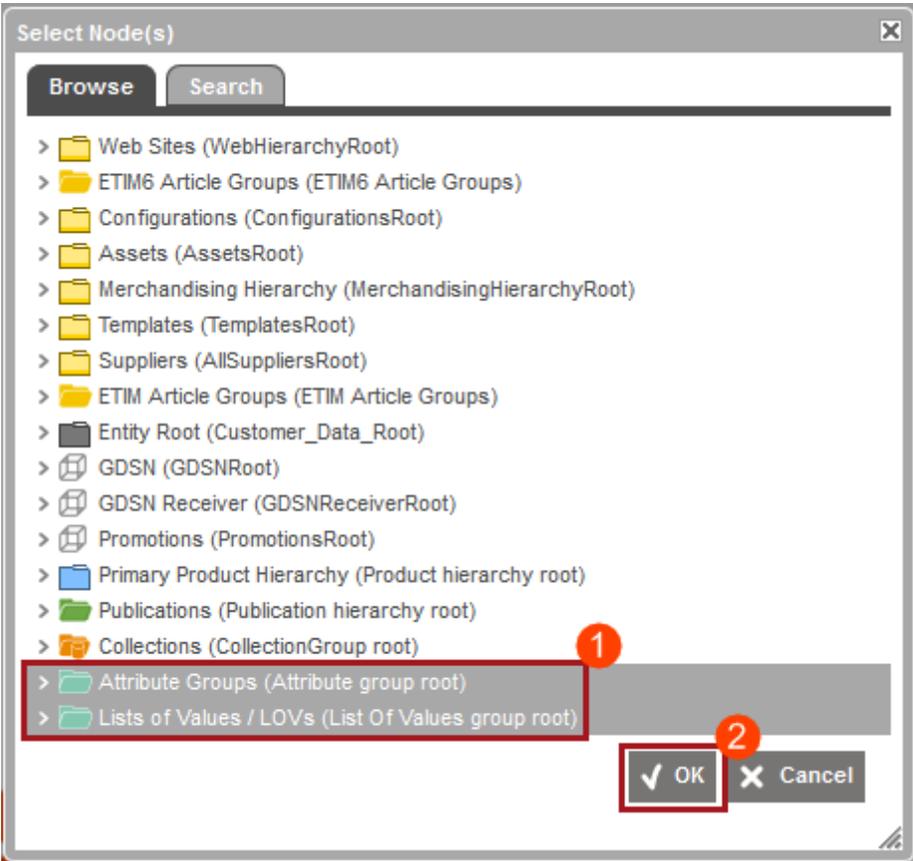
3. On the **Stack Panel Item Properties** configuration, click the **Content** dropdown in the **Child Components** section, and select **Tree Navigator**. In order to assign a useful name to this **Stack panel** element (the default is **Title**), you may consider amending the title in the **Title** field. Then click **go to component**, located to the right of the **Content** field.



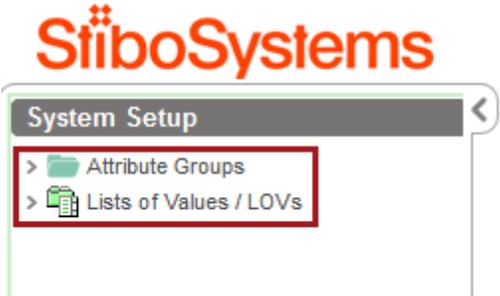
- On the **Tree Navigator Properties**, check the box for **Show Leaves**. Checking this box allows all elements of the hierarchy being added to be viewable and editable, not just the parent nodes. Then, beneath the **Root Node URLs** field, click the **Add** button. This is where the designer can select the Attribute and LOV nodes to add to their stack panel.



5. In the **Select Node(s)** window the **Attribute Groups (Attribute group root)** and **Lists of Values / LOVs (List of Values group root)** will display in the list. You can select one or both of these nodes, and then click the **OK** button at the bottom of the window.



6. Save and close the Designer. Now the **Attribute Groups** and **Lists of Values / LOVs** nodes will appear in the **Stack Panel**.



For more information on configuring and using the various screens required to access the attribute, attribute group, LOV, and LOV group object types in Web UI, please see the subsequent topics.

# Attribute Group Management Screen

By using the **Attribute Group Management screen** in Web UI, users are able to create attributes and create and configure attribute groups.

**Attribute Group Management** English US Main

ID: CustomerData  
 Name: Customer Data  
 Last edited by: 2016-03-17 13:01:46 by USER  
 Manually sorted: No

	ID	Title
Contact Name	ContactName	Contact Name
Data Source	DataSource	Data Source
Fax Number	FaxNumber	Fax Number
Justification	Justification	Justification
Latitude	Latitude	Latitude
Longitude	Longitude	Longitude
Street Number	Street Number	Street Number
Validation Response	Validation Response	Validation Response

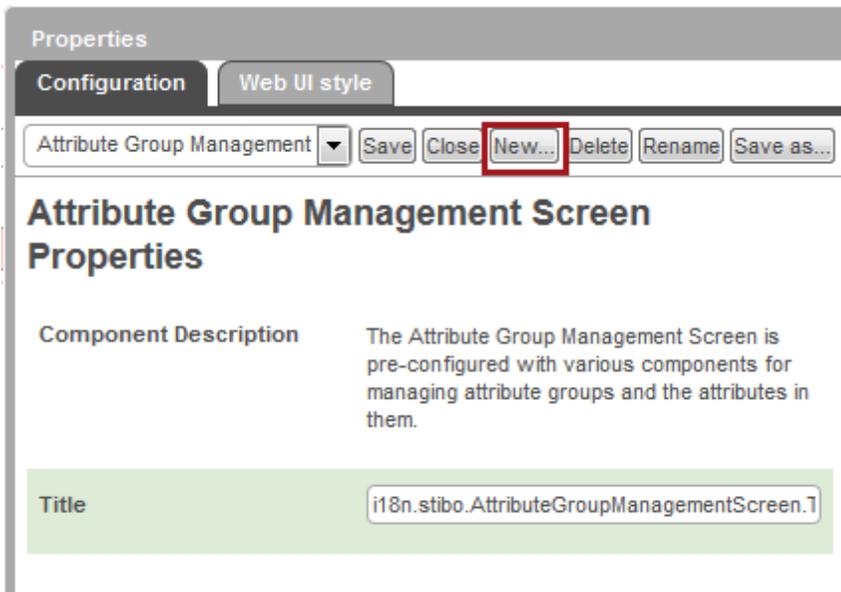
Save Reset Delete Create

## Configuring the Attribute Group Management Screen

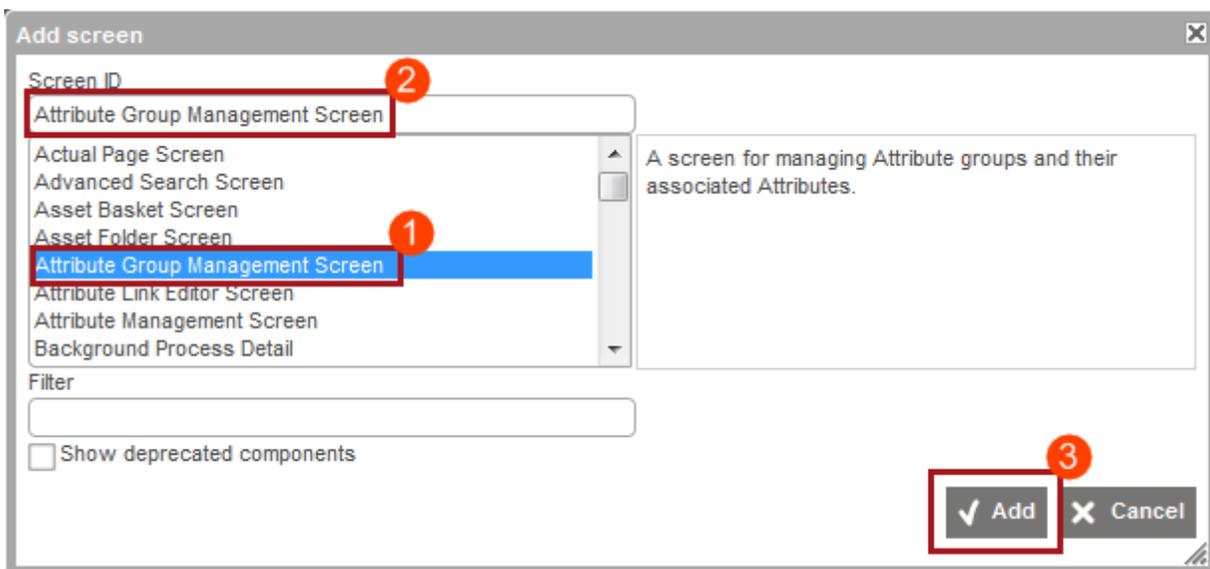
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so that users can access the screen via the stack panel.

To create the **Attribute Group Management screen**, follow the steps below.

1. In the **Designer**, click the **New** button.



- In the **Add screen** window, find **Attribute Group Management screen** in the list of screen names. Select it and then, in the **Screen ID** field, type the name you would like to give this screen in your Web UI. Unless there's a specific business need to change the name, it is simplest to copy the pre-configured screen name. Once the name's been added, click **Add**.



- The screen comes pre-configured with all necessary child components so additional screen-specific configuration is not required. However, as with all new screens, it must be mapped using the **Mappings** parameter in the **---[MAIN]---** dropdown in the Designer. The screen can be mapped using the **Object Type Condition** and selecting the **Attribute Group** node (under Basic Object Types).

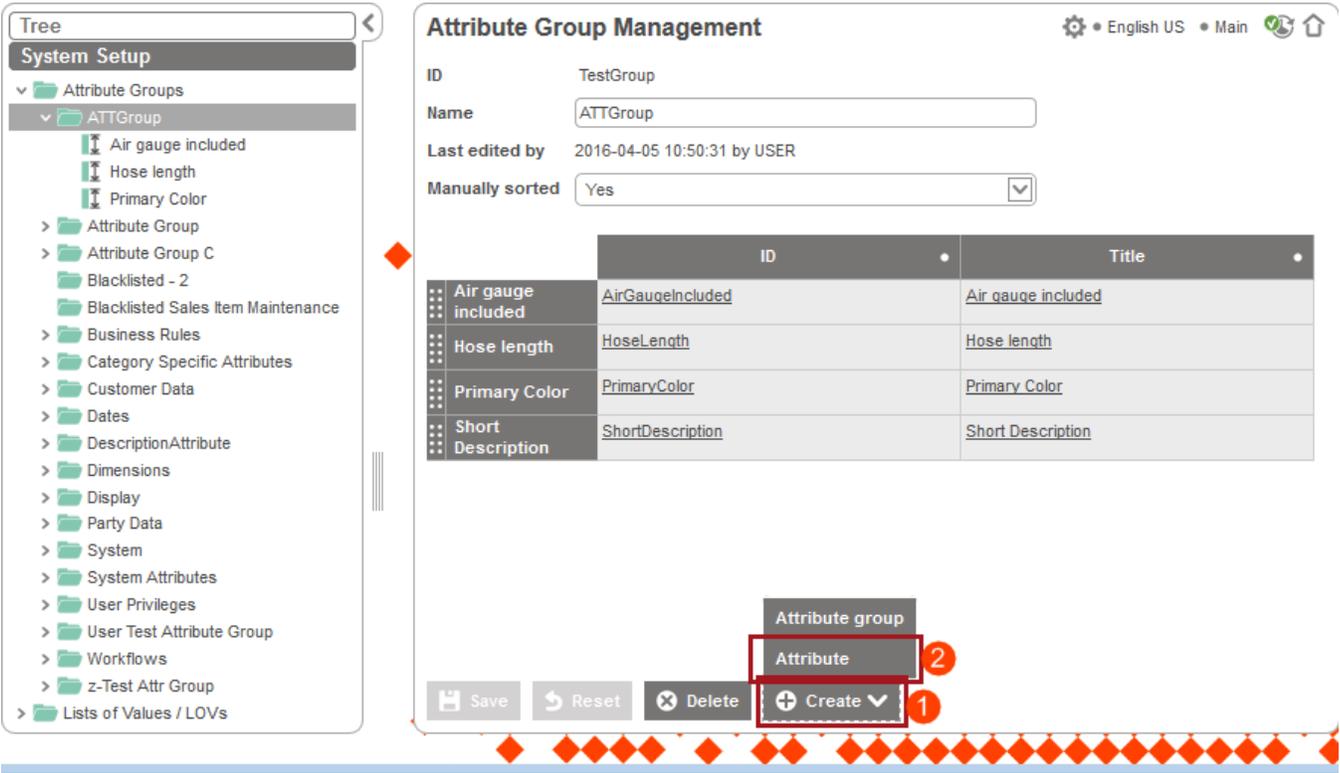
# Using the Attribute Group Management Screen

The following sections describe how to work with attributes and attribute groups within the **Attribute Group Management** screen.

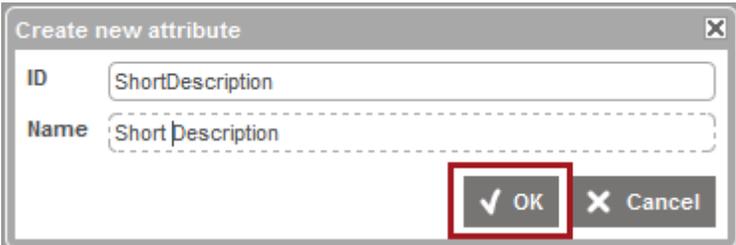
## Creating Attributes

To create a new attribute in Web UI in the **Attribute Group Management** screen, follow these steps:

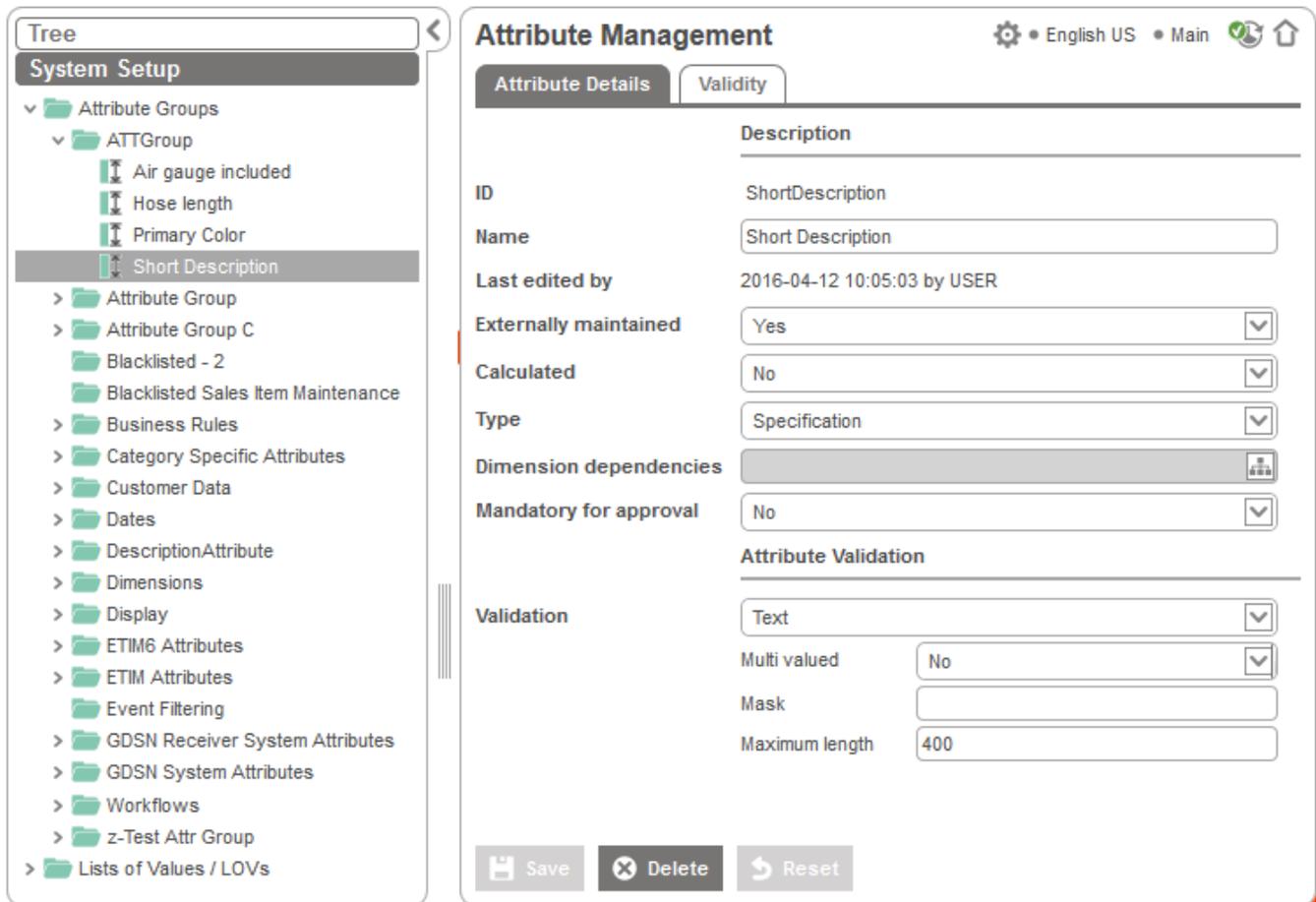
- 1. In the **System Setup** tree (located in the left navigation **Stack Panel**), select the attribute group into which you would like to add your attribute. At the bottom of the **Attribute Group Management** screen, click the **Create** button and then select **Attribute**.



- 2. In the **Create new attribute** window, add the ID and Name of the attribute and then click **OK**.



- 3. The **Attribute Management** screen then displays. This is where you will view and edit the newly created attribute.



4. To edit and configure the attribute, follow the instructions outlined in the **Attribute Management screen** section of the **Web User Interfaces** documentation.

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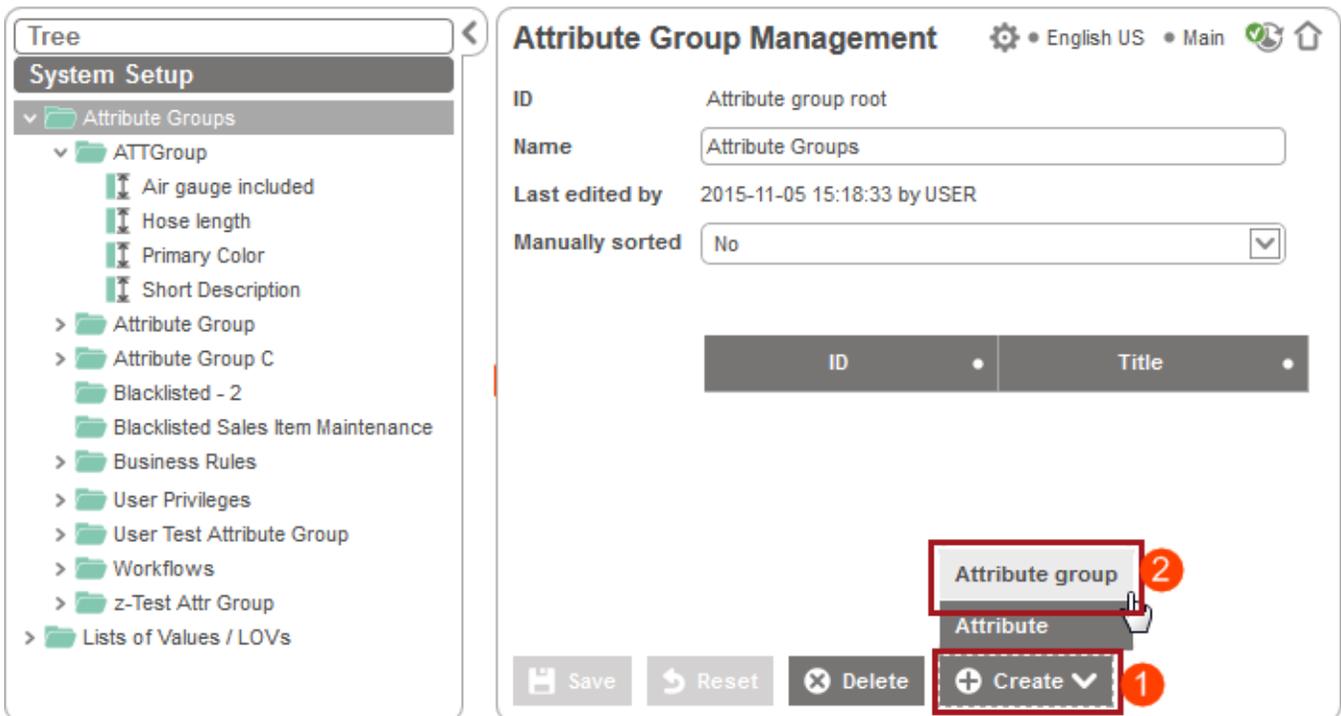
**Note:** In order to link attributes to hierarchies you may configure and use the **Attribute Link Editor** component in Web UI, accessible in the Tree.

---

## Creating Attribute Groups

To create a new attribute group in Web UI, follow these steps:

1. Select either the topmost level of the attribute group hierarchy (parent node) or another attribute group in which you would like to nest your new attribute group. The **Attribute Group Management screen** displays.
2. At the bottom of the **Attribute Group Management screen**, click **Create** and then select **Attribute group**.



3. In the **Create new attribute group** window that displays, add an ID and Name for the attribute group and then click **OK** to close the window.



4. The new attribute group is created.

---

**Note:** An attribute group can only be created as a child of a higher-level (parent) attribute group. An attribute group cannot be created when an attribute is selected.

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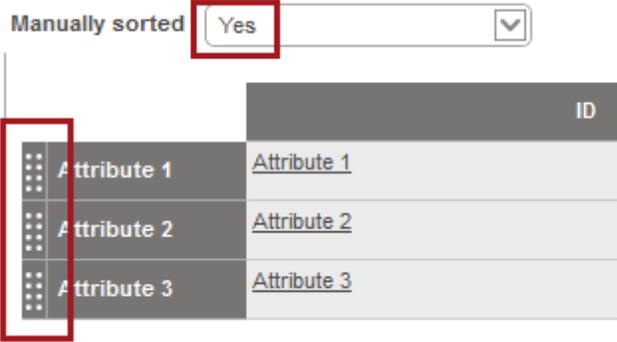
## Maintaining Attribute Groups

In addition to attribute group creation, the **Attribute Group Management screen** also enables you to edit the names of attribute groups, delete attribute groups, and manually reorder attributes.

- **Edit:** To edit the name of an attribute group, simply make the required changes to the attribute in the **Name** field and then click the **Save** button.
- **Delete:** To delete an attribute group, select the attribute group to be deleted in the left navigation area, and then click the **Delete** button.

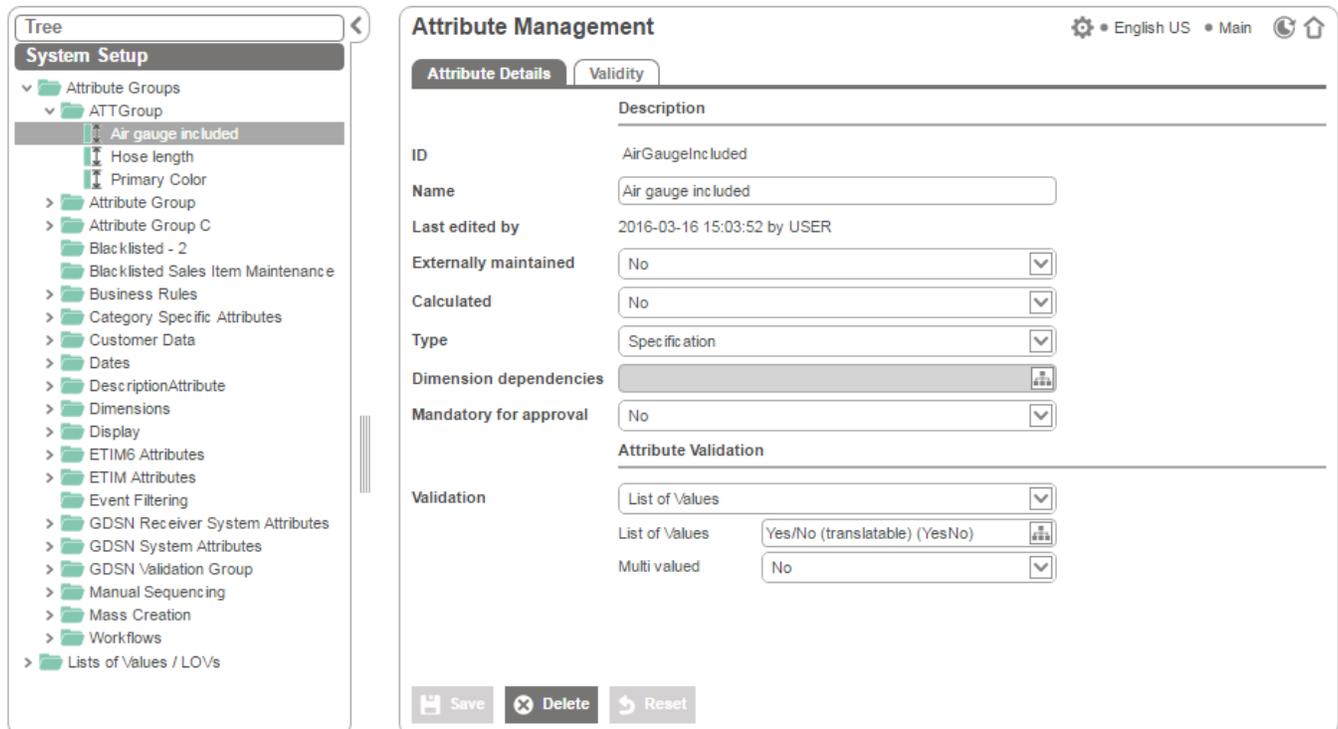
**Important:** Only empty attribute groups can be deleted. Attribute groups that contain attributes cannot be deleted until the child attributes have been deleted or moved into another attribute group.

- **Manually sort:** To manually sort attributes in an attribute group, first select **Yes** for **Manually sorted** and then click the **Save** button. 'Drag handles' appear to the left of each attribute. Simply click and hold an attribute's drag handle, then drag to move it to its new location.



# Attribute Management Screen

By using the **Attribute Management screen** in Web UI, users can edit and configure existing attributes.




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**Note:** Use of Web UI for this functionality is intended to provide basic attribute management capabilities. As such, some of the more advanced attribute configuration options are available only in the workbench.

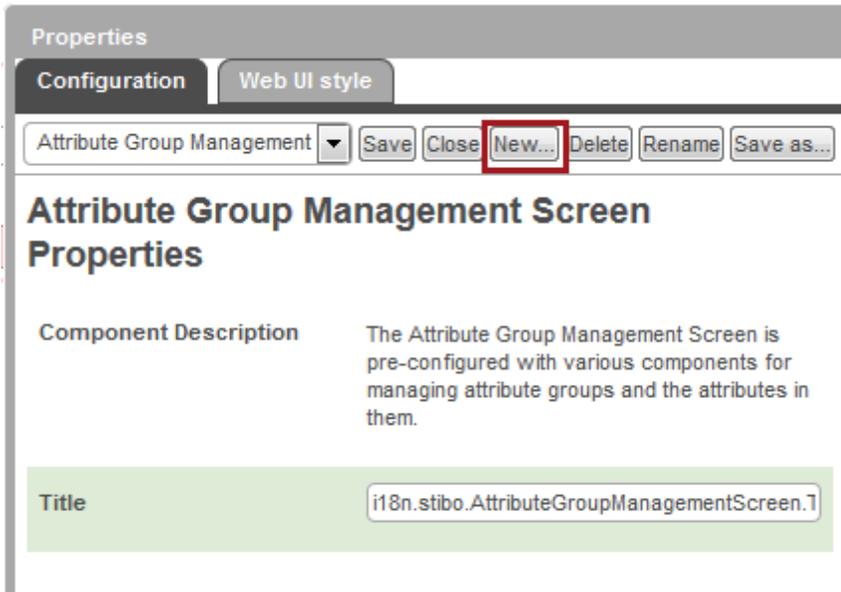
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## Configuring the Attribute Management screen

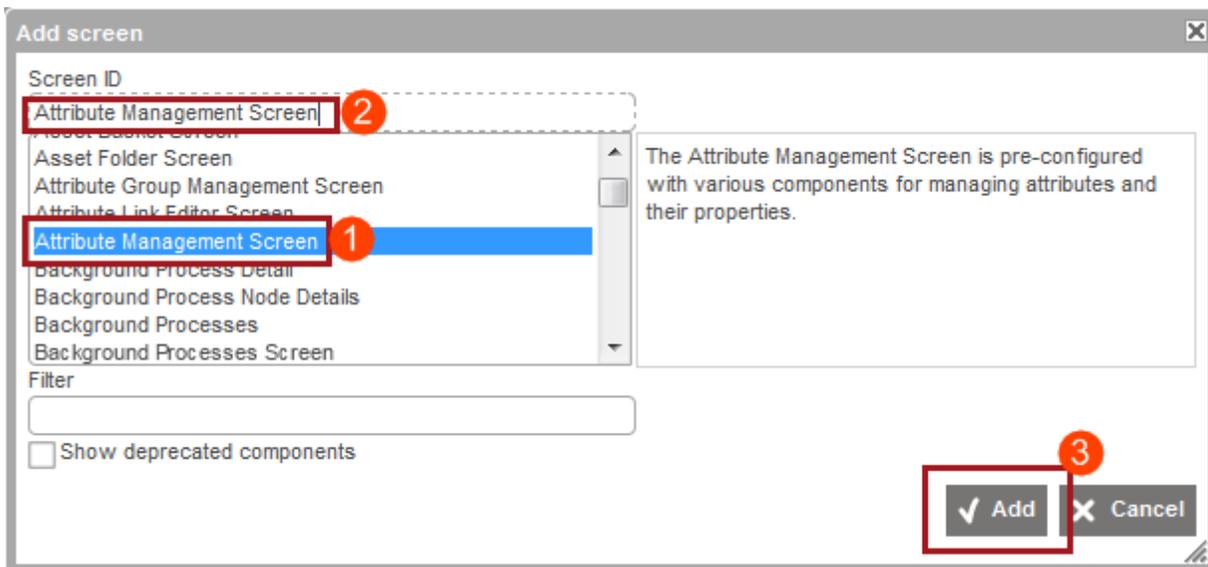
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so users can access the screen via the stack panel.

To create the **Attribute Management screen**, follow the steps below.

1. In the **Designer**, click the **New** button.



- In the **Add screen** window, find **Attribute Management screen** in the list of screen names. Select it and then, in the **Screen ID** field, type the name you would like to give this screen in your Web UI. Unless there's a specific business need to change the name, it is simplest to copy the pre-configured screen name. Once the name's been added, click **Add**.



- The screen comes pre-configured with the required child components so additional configuration is not required. However, the screen is fully configurable and it is possible to add additional components, such as metadata attributes, using standard Web UI configuration options (e.g. addition and configuration of child components). Though possible, it is not recommended to remove the pre-configured components as it may compromise the user's ability to fully edit and maintain attributes. Finally, as with all new screens, it must be mapped using the **Mappings** parameter in the ---[MAIN]--- dropdown in the Designer. The screen can be

mapped using the **Object Type Condition** and selecting the **Attribute** node (under Basic Object Types > Attribute Group).

## Using the Attribute Management screen

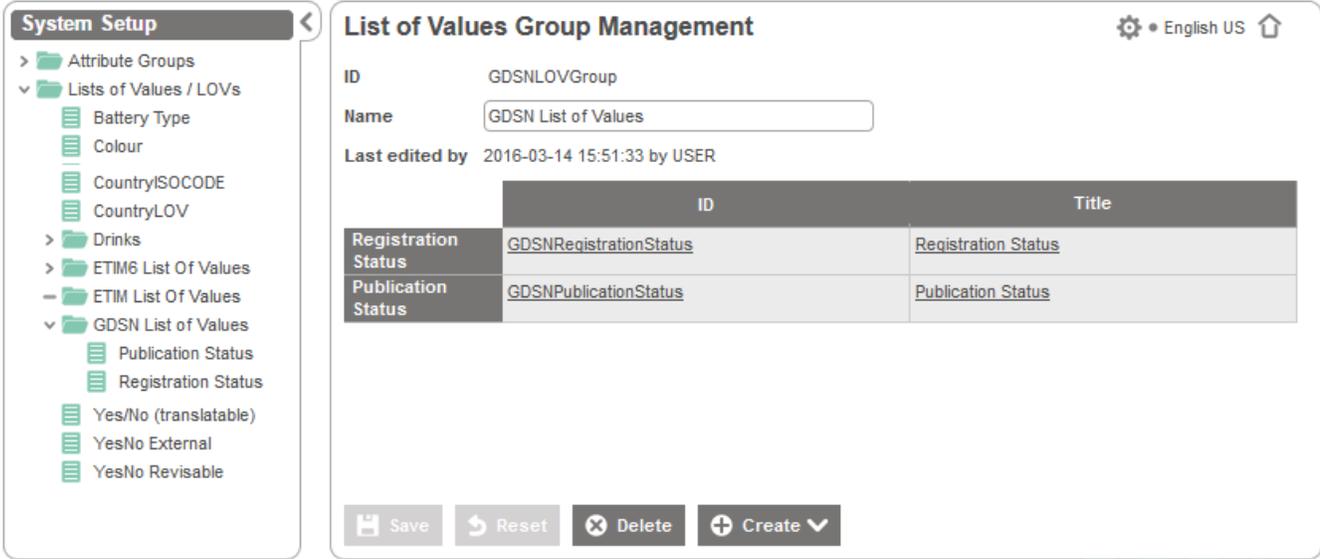
Once configured and mapped, the Attribute Management screen is displayed when a user has selected an attribute via navigation in the left panel, as shown in the first screenshot in this topic. Two tabs display on the **Attribute Management screen** by default: **Attribute Details** and **Validity**.

1. **Attribute Details tab:** On this tab the user is able to edit and configure an existing attribute.
2. **Validity tab:** On this tab the user can configure which object types the attribute is valid for.

Functionality available on each tab is comparable to what is available in the workbench, though some advanced configuration options are not available. For more information on creating attributes, see the **Creating Attributes** section of the **System Setup / Superuser** documentation. For more information on linking an attribute to a product, see the **System Setup / Superuser** documentation.

# List of Values Group Management Screen

By using the **List of Values Group Management screen** in Web UI, users can create Lists of Values (LOVs) and create and configure LOVs.

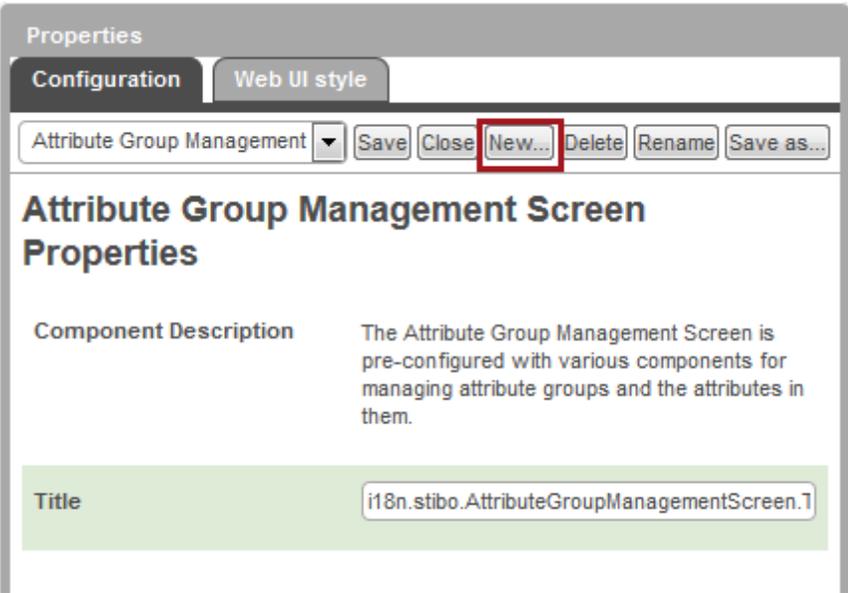


## Configuring the List of Values Group Management screen

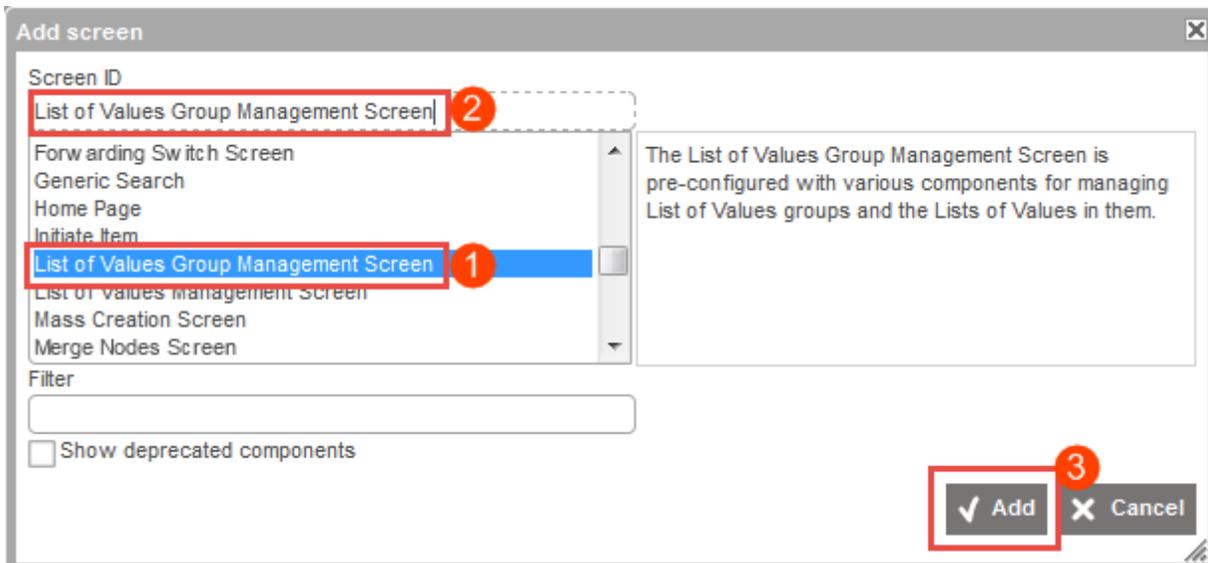
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so that users can access the screen via the stack panel.

To create the **List of Values Group Management screen**, follow the steps below.

1. In the **Designer**, click the **New** button.



- In the **Add screen** window, find **List of Values Group Management screen** in the list of screen names. Select it and then, in the **Screen ID** field, type the name you would like to give this screen in your Web UI. Unless there's a specific business need to change the name, it is simplest to copy the pre-configured screen name. Once the name's been added, click **Add**.



- The screen comes pre-configured with all necessary child components so additional screen-specific configuration is not required. However, as with all new screens, it must be mapped using the **Mappings** parameter in the **---[MAIN]---** dropdown in the Designer. The screen can be mapped using the **Object Type Condition** and selecting the **List Of Values Group Type** node (under Basic Object Types).

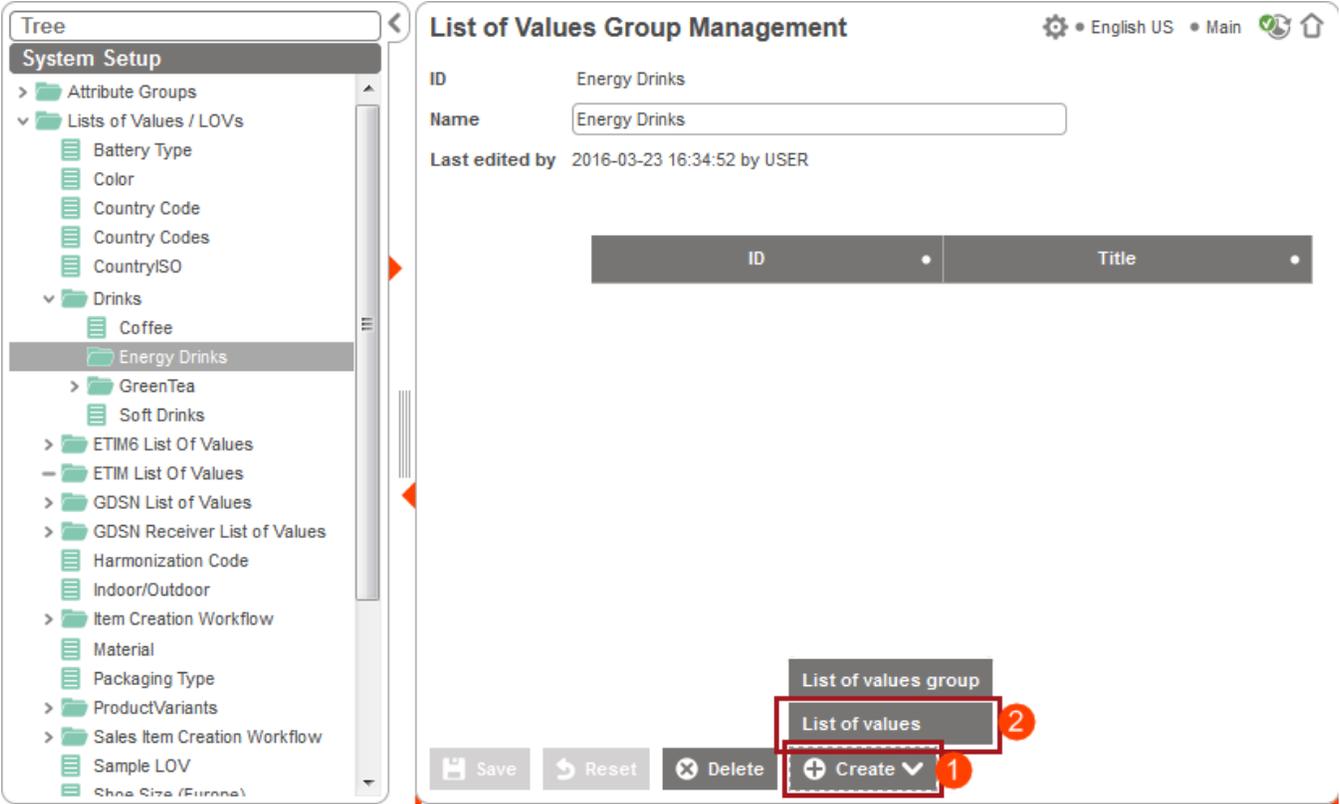
## Using the List of Values Group Management screen

The following sections describe how to work with LOVs and LOV groups within the **List of Values Group Management screen**.

### Creating Lists of Values

To create a new LOV in the **List of Values Group Management screen**, follow these steps:

- In the **System Setup** tree (located in the left navigation **Stack Panel**), select the LOV group into which you would like to add a new LOV. At the bottom of the **List of Values Group Management screen**, click the **Create** button and then select **List of Values**.



2. In the **Create new list of values** window, add the **ID** and **Name** of the LOV and click **OK**. If no **Name** text is supplied, the value supplied for **ID** will automatically populate the **Name** field.



3. The **List of Values Management** screen will then display. This is where you will view and edit the newly created LOV.

## List of Values Management

• English US • Main

List of Values Details

Values

<b>ID</b>	EnergyDrinkLOV
<b>Name</b>	<input type="text" value="Energy Drink LOV"/>
<b>Last edited by</b>	2016-04-12 12:29:20 by USER
<b>Dimension dependencies</b>	<input type="text" value=""/>
<b>Validation</b>	<input type="text" value="Text"/>
	Mask <input type="text"/>
	Maximum length <input type="text" value="100"/>
<b>Allow users to add values</b>	<input type="text" value="No"/>
<b>Use IDs on values</b>	<input type="text" value="No"/>

Save

Delete

Reset

4. To edit and configure the LOV, follow the instructions outlined in the **List of Values Management screen** section of the **Web User Interfaces** documentation.

### Creating List of Values Groups

To create a new LOV group in Web UI, follow these steps:

1. Select either the topmost level of the LOV group hierarchy (parent node) or another LOV group in which you would like to nest your new LOV group. Once selected, the **List of Values Group Management screen** will then display.
2. Click **Create** and then select **List of Values group**.

Tree

System Setup

- Attribute Groups
- Lists of Values / LOVs
  - Battery Type
  - Color
  - Country Code
  - Country Codes
  - CountryISO
  - CountryISOCODE
  - CountryLOV
  - Drinks
    - Coffee
    - Energy Drinks
    - GreenTea
      - Soft Drinks
    - Soft Drinks
  - ETIM6 List Of Values
  - ETIM List Of Values
  - GDSN List of Values
  - GDSN Receiver List of Values
  - Harmonization Code
  - Material
  - Packaging Type
  - ProductVariants
  - Sales Item Creation Workflow
  - Sample LOV

List of Values Group Management

ID: Drinks

Name: Drinks

Last edited by: 2015-08-11 13:51:15 by USER

ID	Title
Coffee	Coffee
GreenTea	GreenTea
Soft Drinks	Soft Drinks

Save Reset Delete Create

List of values group

List of values

3. In the **Create new list of values group** window that then displays, add the desired **ID** and **Name** of the LOV group and click **OK**. As with creating LOVs, if no **Name** text is supplied, the value supplied for **ID** will automatically populate the **Name** field.

Create new list of values group

ID: Energy Drinks

Name: Energy Drinks

OK Cancel

4. The new **List of Values group** is created.

List of Values Group Management

English US Main

ID: Energy Drinks

Name: Energy Drinks

Last edited by: 2016-03-23 16:34:52 by USER

ID	Title
----	-------

Save Reset Delete Create

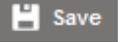
---

**Important:** An LOV group can only be created as a child of a higher-level (parent) LOV group. An LOV group cannot be created when an LOV is selected.

---

## Maintaining List of Values Groups

Users can edit and delete LOV groups while accessing the **List of Values Group Management** screen:

- **Edit:** To edit the name of the LOV group, simply make the required changes to the text in the **Name** field and then click the  **Save** button.
- **Delete:** To delete an LOV group, select the LOV group to be deleted in the left navigation area, and then click the  **Delete** button.

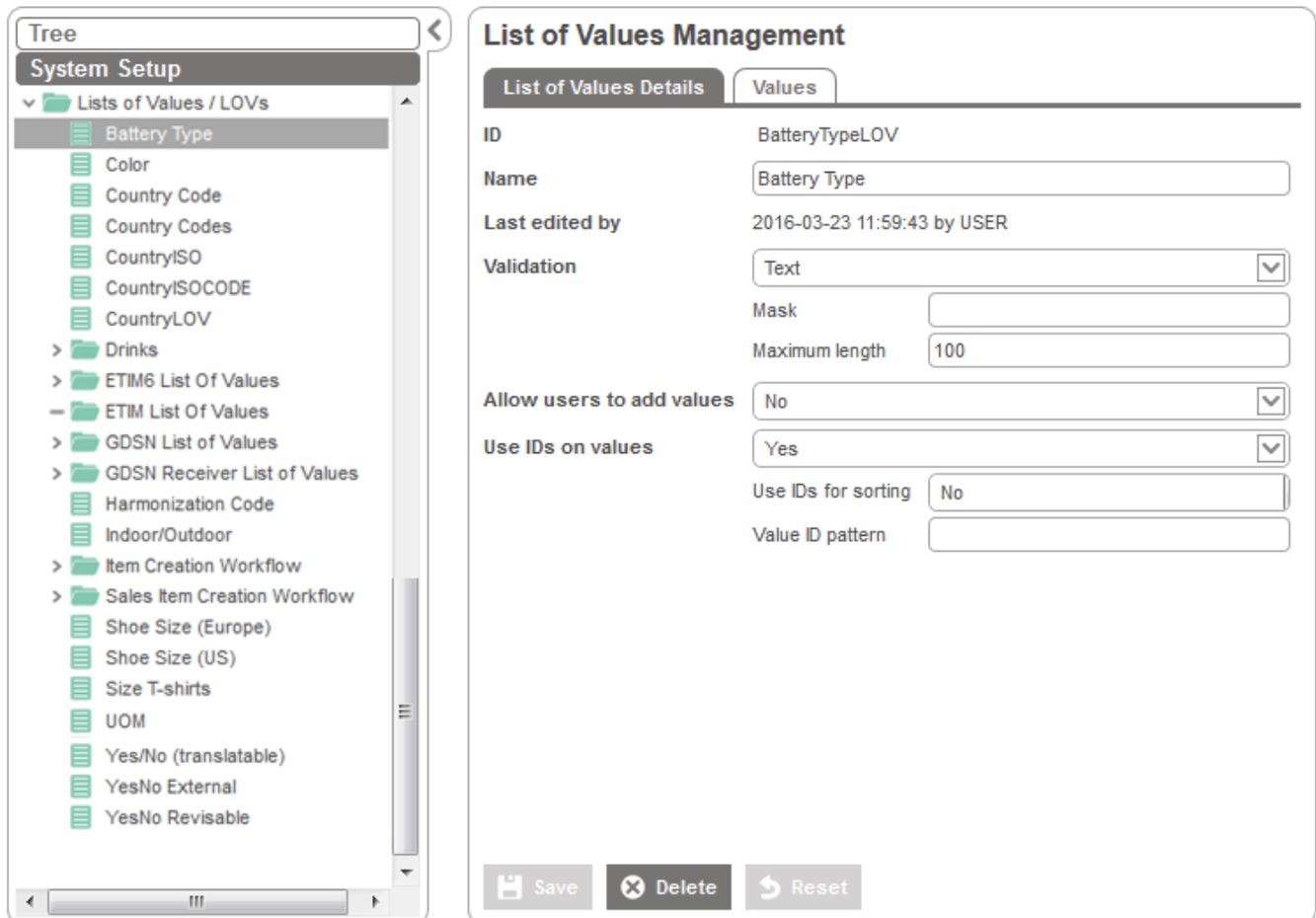
---

**Important:** Only empty LOV groups can be deleted. LOV groups that contain LOVs cannot be deleted until the child LOVs have been deleted or moved into another LOV group.

---

# List of Values Management Screen

By using the **List of Values Management screen** in Web UI, users can edit and configure new and existing Lists of Values (LOVs), including adding / deleting LOV values.

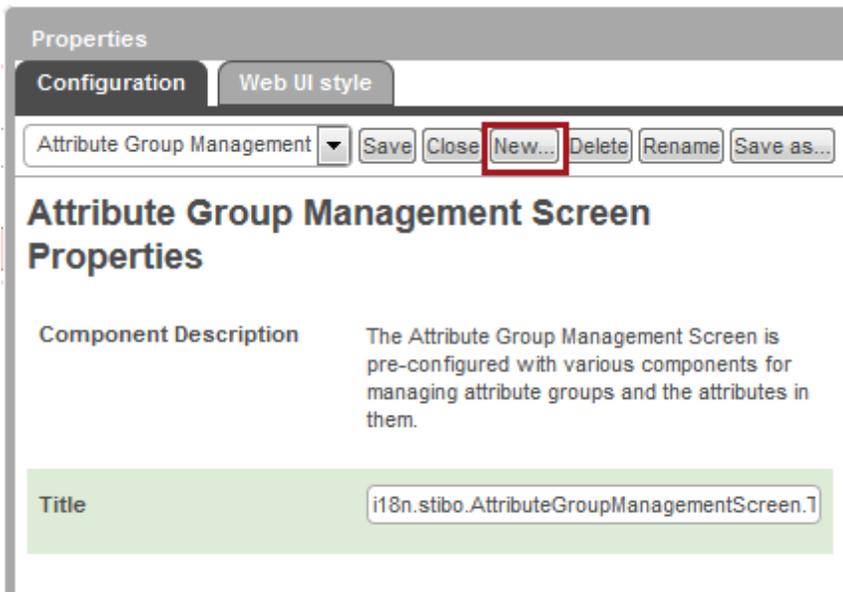


## Configuring the List of Values Management screen

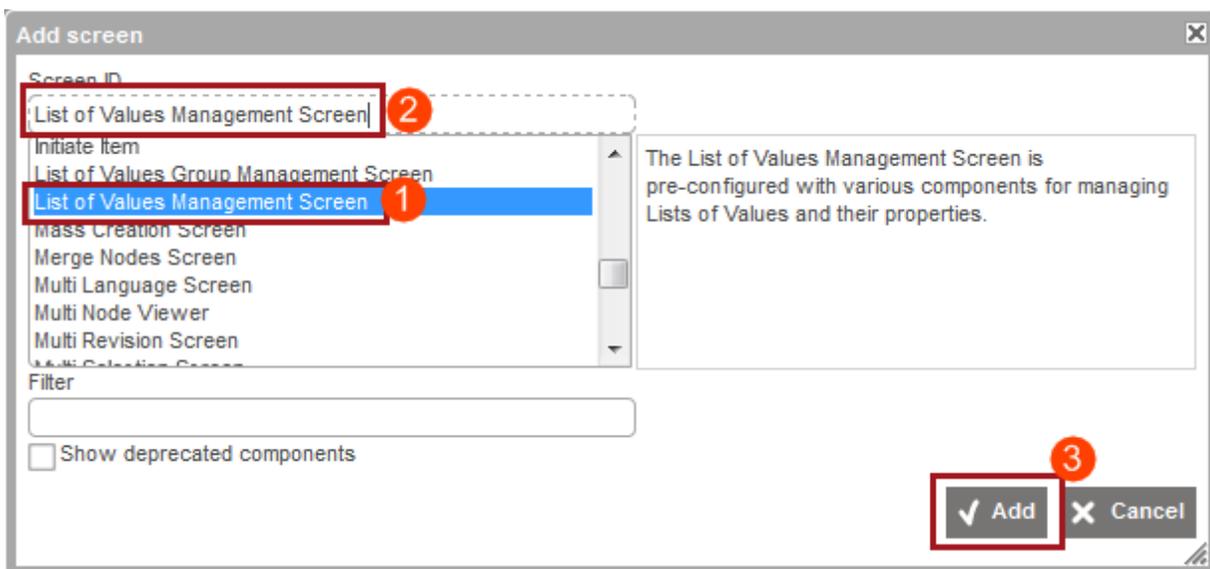
Before configuring the screen, it is assumed that the general configuration described in the **Attribute and LOV Creation and Maintenance Configuration** section of the Web UI documentation has been completed so that users can access the screen via the stack panel.

To create the **List of Values Management screen**, follow the steps below.

1. In the **Designer**, click the **New** button.



- In the **Add screen** window, find **List of Values Management screen** in the list of screen names. Select it and then, in the **Screen ID** field, type the name you would like to give this screen in your Web UI. Unless there's a specific business need to change the name, it is simplest to copy the pre-configured screen name. Once the name's been added, click **Add**.



- The screen comes pre-configured with all necessary child components so additional screen-specific configuration is not required. However, as with all new screens, it must be mapped using the **Mappings** parameter in the **---[MAIN]---** dropdown in the Designer. The screen can be mapped using the **Object Type Condition** and selecting the **Domains** node (under Basic Object Types > List of Values Group Type).

## Using the List of Values Management screen

Two tabs display on the **List of Values Management** screen: **List of Values Details** and **Values**.

1. **List of Values Details tab**: On this tab the user is able to edit and configure a new or existing LOV.
2. **Values tab**: On this tab the user can add or delete values that make up the LOV.

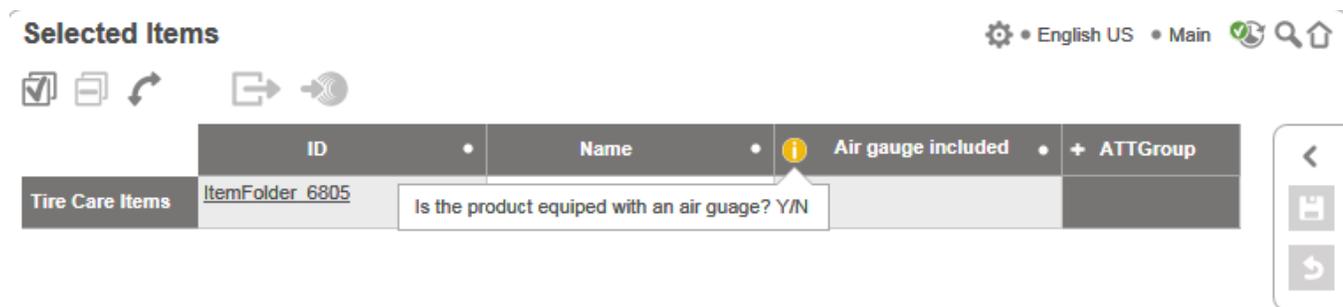
Functionality available on each tab is comparable to what is available in the workbench, though some advanced configuration options are not available. For more information on creating and maintaining LOVs, see the **Maintaining List of Values** section of the **System Setup / Superuser** documentation.

# Attribute Help Text in Web UI

Help texts can be used to provide information to end users about an attribute and how it should be populated.

Help texts can be added to individual object editors (Node Editors) or to multi-object editors and grid views (Node Lists), as shown below.

## Item



This section describes the steps necessary to provide attribute help texts in Web UI.

## Prerequisites

To configure attribute help text, it is expected that the user has knowledge of System Setup functions and Web UI Designer.

Attribute help texts can be entered individually in Web UI, per attribute and screen / component configuration, but this is a time-consuming process. Instead, it is recommended to apply global attribute help texts using the workbench, and then to provide local overrides in Web UI only as needed. For this approach, the system must first have a metadata attribute available to house the global help texts. See the **Attribute Metadata on Attributes** section in the **System Setup / STEP Super User** documentation for more information for instructions on how to complete this setup. Once complete, follow the below steps to enable attribute help text in Web UI.

## Identify the metadata attribute used for help texts in System Settings

A metadata attribute must exist as valid on attribute object types, to be used to populate help text for individual attributes. For this example, an attribute with ID=AttributeHelpText is used. On any given attribute, text can be populated in the help text attribute.

Name	Value
ID	Seasonal
Name	Seasonal
Last edited by	2016-03-04 11:42:43 by USER2
Full Text Indexable	No
Externally Maintained	No
Hierarchical Filtering	Product Hierarchy
Calculated	No
Type	Description
Dimension Dependencies	
Mandatory	No
Cryptographic Key	<No Encryption>
Attribute Description	abc
Attribute Help Text	abc Select Yes if the product is sold seasonally; Select No if the product is sold in stores year-round.
Completeness Score	11.33

In order to inform the Web UI where to pull help texts from, the help text attribute must be specified. In **System Setup**, navigate to the **Users & Groups** root node and type the ID of the metadata attribute in **Context Help metadata attribute** located under **Web UI Settings**.

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

## Set Component Properties in Web UI

Once the workbench setup is complete, help texts must be enabled in Web UI. This is done using the **Display Context Help** parameter, which is available on attribute-related components (e.g. Attribute Value, Attribute Value Header, Attribute Value Group Header, Variants Header).

Properties

Configuration Web UI style

Item detail Save Close New... Delete Rename Save as...

### Attribute Value Component Properties [go to parent](#)

**Component Description** The Attribute Value component is used for displaying the value of an attribute for a selected object. Used in combination with a Node Details screen.

**Attribute\*** AirGaugeIncluded

▼ **Advanced**

**Columns** 1

**Context Help**

**Display Context Help**

When end users access a component in which help text is enabled, the yellow information icon appears when the user hovers the attribute label, and clicking the icon reveals the help text.

If an override to the attribute help text from workbench is required, it can be done in Web UI by entering a new value in the 'Context Help' parameter, as seen in the example below. This can be useful when some additional instruction is needed only in a particular context. For example, when introducing a new object instructions for data population may differ slightly from those for established objects. In this case, Web UI designers could populate local help text that would only be available in an item initiation screen.

Properties (edited)

Configuration Web UI style

Item detail Save Close New... Delete Rename Save as...

### Attribute Value Component Properties [go to parent](#)

**Component Description** The Attribute Value component is used for displaying the value of an attribute for a selected object. Used in combination with a Node Details screen.

**Attribute\*** AirGaugeIncluded

▼ **Advanced**

**Columns** 1

**Context Help** Overriding the workbench value.

**Display Context Help**

Air gauge included   Yes 

Overriding the workbench value.

# Attribute Value Components

An Attribute Value component can be added to a Node Editor to display the value for a single attribute.

**Item**

**Basic Information and references** | Revisions | Category Information

Product Category *fx* Products | Apparel | Upper Body Wear | T-shirts | T-shirts |

Name 12-GGK79

ID 100703

Primary Product Image

Approved Last approved 2/8/16 4:38 PM

Base Unit of Measure CASE

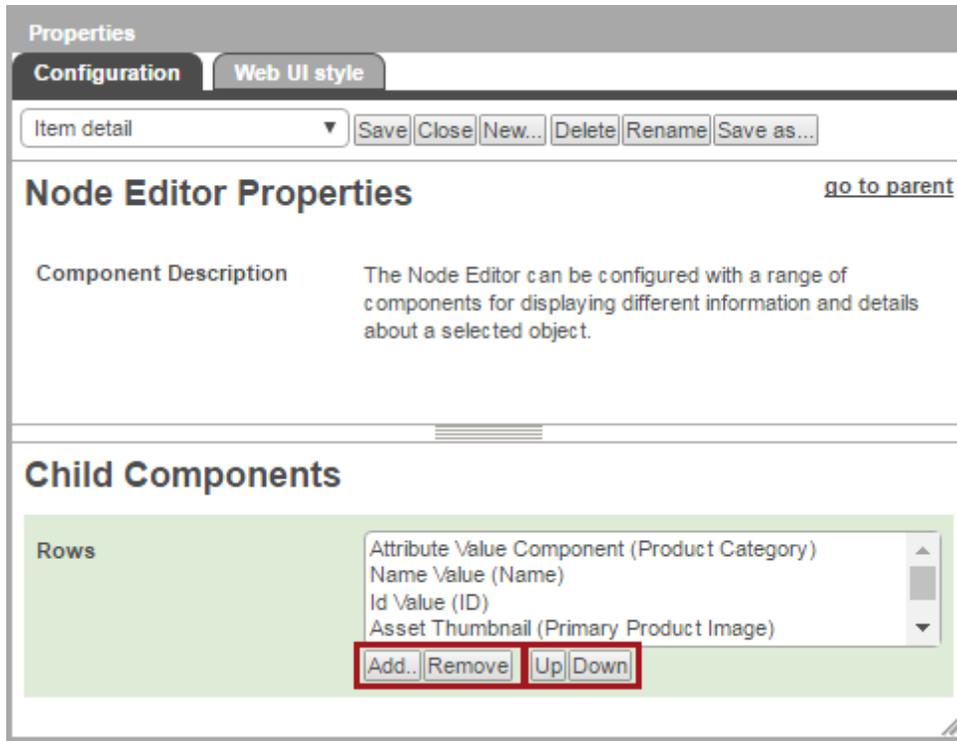
Product Name The Blue Shirt

Short Item Description This is a blue shirt.

Long Item Description This is a dazzling blue shirt.

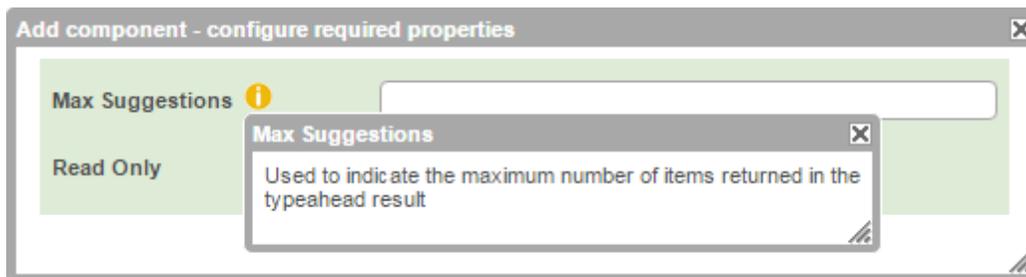
The attributes shown above (e.g., Name, ID, Product Name) are displayed within a Node Editor on a Node Details screen.

Attribute Value components are added within the Child Components section of the Node Editor Properties. They can be added and removed using the buttons below the Rows field, and the attribute values will display on-screen based on how they are ordered within the field. They can be re-ordered using the Up and Down buttons.



## Component Properties Configuration

An Attribute Value component is highly configurable. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.



Follow these steps to configure the component:

1. The only mandatory parameter is **Attribute**. To select an attribute, click the ellipsis to the right of the Attribute value field. A Select Node(s) dialog will appear and an attribute can be selected by browsing and navigating down to the desired attribute or by using the search feature.

**Add component - configure required properties**

The Attribute Value Component component has required properties  
Required properties (\*) must be set before the component can be added to the configuration.

### Attribute Value Component Properties

**Component Description**      The Attribute Value component is used for displaying the value of an attribute for a selected object. Used in combination with a Node Details screen.

**Attribute\***

Enable STEP Tags

Enable Tag Conversion

Label

Label Css Class

Mandatory

Max Suggestions

Read Only

▶ LOV Options

▶ Advanced

2. **Enable Tag Conversion** is enabled by default when adding new Attribute Value components. This makes it easier to use < and > symbols in attribute values without having to do additional configuring. Additionally, the Rich Text Editor ('Edit formatted value' icon ) will be present for attributes with text and numeric text validation base types.

---

**Important:** There is more information to be aware of when enabling and disabling this parameter. Please see the **Enable Tag Conversion** section at the end of this topic.

---

3. An admin user may also choose to enable additional main parameter settings. For example:
  - Label - override the attribute name by adding new text that will display in its place
  - Max Suggestions - determine the number of suggestions returned when an LOV is set to (or automatically uses) type-ahead functionality
  - Read Only - lock the attribute on the screen so end users cannot edit the value

- Click the arrowheads next to the **LOV Options** and **Advanced** headings to see the parameters available under each. Configure the parameters as needed.

## Enable Tag Conversion

- If Enable Tag Conversion is disabled / unchecked and a style is applied to a value (e.g., bold or italic), the field locks and Rich Text Editor is the only way to edit the values.
- If adding an Attribute Value Component as a child component within an Address Detail parent component, disable the Enable Tag Conversion parameter. Using the Address Detail Search component to auto-populate companion address attribute values based on the search results is only possible upon disabling this parameter.
- If you experience issues while using the Rich Text Editor in Internet Explorer, use an alternate browser such as Chrome, Firefox, or Safari.

# Attribute Value Group Components

The Attribute Value Group component can be added to a Node Editor to display the values for each attribute within an attribute group.

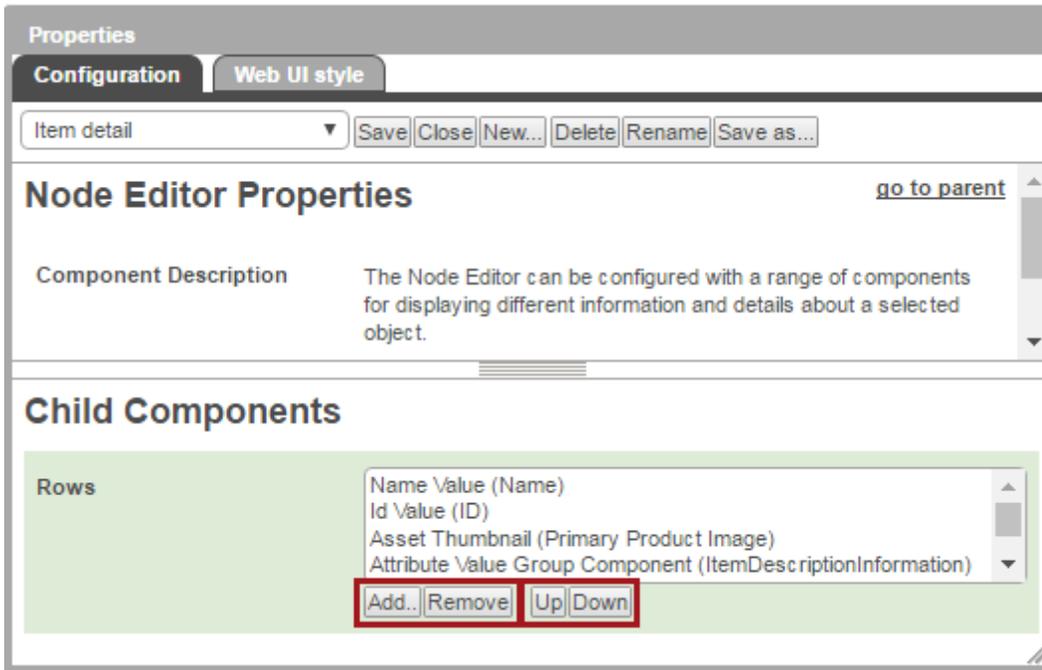
One major benefit to using an Attribute Value Group component (versus multiple Attribute Value components) is that when new attributes are created in the attribute group displayed, then the new attribute values automatically appear on the screen without additional Web UI configuration.

## Item

Basic Information and references		Revisions	Category Information
Name	<input type="text" value="12-GGK79"/>		
ID	<input type="text" value="100703"/>		
Primary Product Image			
Base Unit of Measure	<input type="text" value="CASE"/>		
Product Name	<input type="text" value="The Blue Shirt"/>		
Short Item Description	<input type="text" value="This is a blue shirt."/>		
Long Item Description	<input type="text" value="This is a dazzling blue shirt."/>		

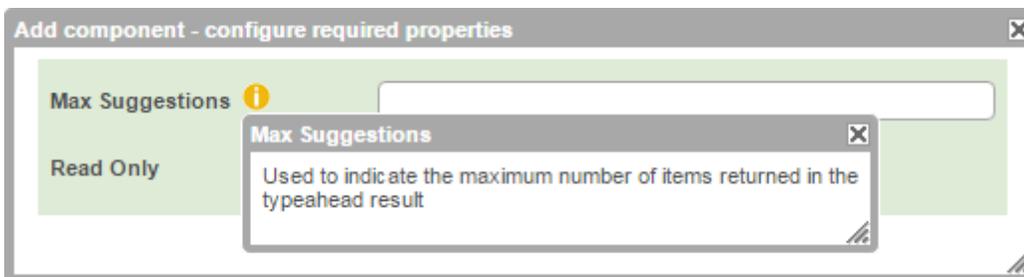
The attributes shown above (e.g., Name, ID, Product Name) are displayed within a Node Editor on a Node Details screen.

Attribute Value Group components are added within the Child Components section of the Node Editor Properties. They can be added and removed using the buttons below the Rows field. The Node Editor Child Components will display on-screen based on the order they are within the Rows field and can be re-ordered using the Up and Down buttons.



## Component Properties Configuration

An Attribute Value Group component is highly configurable. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.



Follow these steps to configure the component:

1. The only mandatory parameter is **Attribute Group**. An attribute group needs to be selected by clicking the ellipsis to the right of the Attribute Group value field. A Select Node(s) dialog will appear and an attribute group can be selected by browsing and navigating to the desired group or by using the search feature.

**Add component - configure required properties**

The Attribute Value Group Component component has required properties  
Required properties (\*) must be set before the component can be added to the configuration.

### Attribute Value Group Component Properties

**Component Description** The Attribute Value Group component can be configured to display a group of attributes values valued for a selected object. Attributes added to a selected Attribute Group will automatically be included and displayed in the Node Editor screen. Used in combination with a Node Editor screen .

**Attribute Group\***  ...

**Blacklisted Attribute Group**  ... Clear

**Context Help**

**Display Mode** <Select a value> ▼

**Enable STEP Tags**

**Enable Tag Conversion**

**Exclude Filters**   
Add... Edit... Remove Up Down

**Excluding**   
Add... Remove Up Down

**Filter Attribute Type** <Select a value> ▼

**Include References**

2. If desired, make a **Display Mode** selection using the dropdown.

- **Merged** - attributes below the selected attribute group and sub groups are displayed together alphabetically
- **Partitioned** - attributes are displayed alphabetically within their attribute groups
- **Hierarchical** - attribute group titles shown with attribute titles indented below, according to the attribute group structure

ISODate

ISO Date Time

Category Specific Attributes

Primary Color

URL

- **Sectioned** - attributes presented in sections; one section per attribute group; collapse and expand by clicking on the attribute group title

ISODate

ISO Date Time

Category Specific Attributes ←

Primary Color

URL

3. **Enable Tag Conversion** is enabled by default when adding new Attribute Value Group components. This makes it easier to use < and > symbols in attribute values without having to do additional configuring. Additionally, the Rich Text Editor ('Edit formatted value' icon ) will be present for attributes with text and numeric text validation base types.

---

**Important:** There is more information to be aware of when enabling and disabling this parameter. Please see the **Enable Tag Conversion** section at the end of this topic.

---

4. An admin user may also choose to enable additional main parameter settings. For example:
  - Excluding - prevent specified attributes (within the attribute group) from displaying for this particular Node Editor screen
  - Max Suggestions - determine the number of suggestions returned when an LOV is set to (or automatically uses) type-ahead functionality
  - Read Only - lock all the attribute fields so that end users cannot edit the values
5. Click the arrowheads next to the **Advanced** heading to see additional available parameters. Configure as needed.

**Add component - configure required properties**

Mandatory

Max Suggestions

Read Only

Reference Parameters

Rich Text Editing

Show LOV IDs

Sort LOV By ID

▼ **Advanced**

Enable Locale Formatting

Display Context Help

Display Value History

## Enable Tag Conversion

- When Enable Tag Conversion is enabled, automatic rich-text editing for text and numeric text attribute values overrides the Rich Text Editing parameter setting.
- If Enable Tag Conversion is disabled / unchecked and a style is applied to a value (e.g., bold or italic), the field locks and Rich Text Editor is the only way to edit the values.
- If you experience issues while using the Rich Text Editor in Internet Explorer, use an alternate browser such as Chrome, Firefox, or Safari.

# Attribute Value Group LOV Type-Ahead Functionality

A List of Values (LOV) is a set of values that can be selected and used for an attribute. LOV values for LOV validated attributes configured to display as part of an **Attribute Value Group component** function differently depending on the number of values.

If an LOV has greater than 5,000 values, the LOV becomes type-ahead based thereby allowing the users to narrow down the possible values to select from by typing in part of the desired value. For example, a user can type in the letters 'blu' into a color attribute field and the system will show only the configured values that start with 'blu' (e.g., blue, blueberry, blue green, and blush pink). The user then makes a selection from these choices. This significantly speeds up processing time since the user is not presented with every color (A to Z) to choose from.

If an LOV has 5,000 or fewer values, all the values are loaded into the system as soon as the Attribute Value Group component loads in a Web UI screen. This may create a Web UI performance issue if an Attribute Value Group component is configured to display multiple attributes that each have large LOVs (e.g., 2,000 - 3,000 values). Since the system is loading the entire value list for each LOV and type-ahead functionality is not automatically available, users may experience system slowness as they work in Web UI. **For this very specific use case, a configuration setting change can be made to force all Attribute Value Group LOV attributes to be type-ahead based.**

## Property Settings

To use type-ahead LOV functionality for all LOVs in Attribute Value Group components, add the following property to the **sharedconfig.properties** file:

```
Portal.ValueGroup.LOV.ForceTypeahead=true
```

---

**Important:** Carefully consider changing the configuration. The property setting will impact **all** Web UIs used within a STEP system after the application server has been restarted.

---

## Excluding Attributes

It is possible to exclude certain LOVs from being type-ahead based. To exclude any attributes from the global type-ahead setting, this property will also need to be added to the **sharedconfig.properties** file:

```
Portal.ValueGroup.LOV.ForceTypeahead.Exclude=[AttributeID],[AttributeID], etc.
```

The property setting shown is an example only. In place of [AttributeID], enter the actual ID of the attribute to be excluded from the type-ahead functionality.

See the **List of Values (LOVs) Overview** section of the **Getting Started / STEP User Guide** documentation for more information about setting up and using LOVs.

## Attribute Value History

It is possible to see the historic data of a certain attribute value and track how the value has changed over time within the Web UI. This functionality is accessible when viewing an object details page (Node Details) in Web UI. Hovering over the attribute label makes the history icon appear for that attribute, and clicking the icon opens a simple view displaying historic information including revision, edited on (date / time), edited by, and the value of the attribute. Note that individual revisions are displayed only if the attribute value differed between them.

The screenshot shows a web form with several attributes. The 'Hose length' attribute is highlighted with a tooltip showing its value history. The tooltip contains a table with the following data:

Value history:			
Revision	Edited on	Edited by	Value
0.4	2016-03-11 14:29:48	USER	16 in
0.2-0.3	2016-03-01 13:40:23	USER	15 in
0.1	2016-02-24 08:44:13	USER	

Other attributes visible in the form include 'Air gauge included' (Yes), 'Pressure' (Primary C), 'Seasonal', 'URL', and 'www.fx'.

---

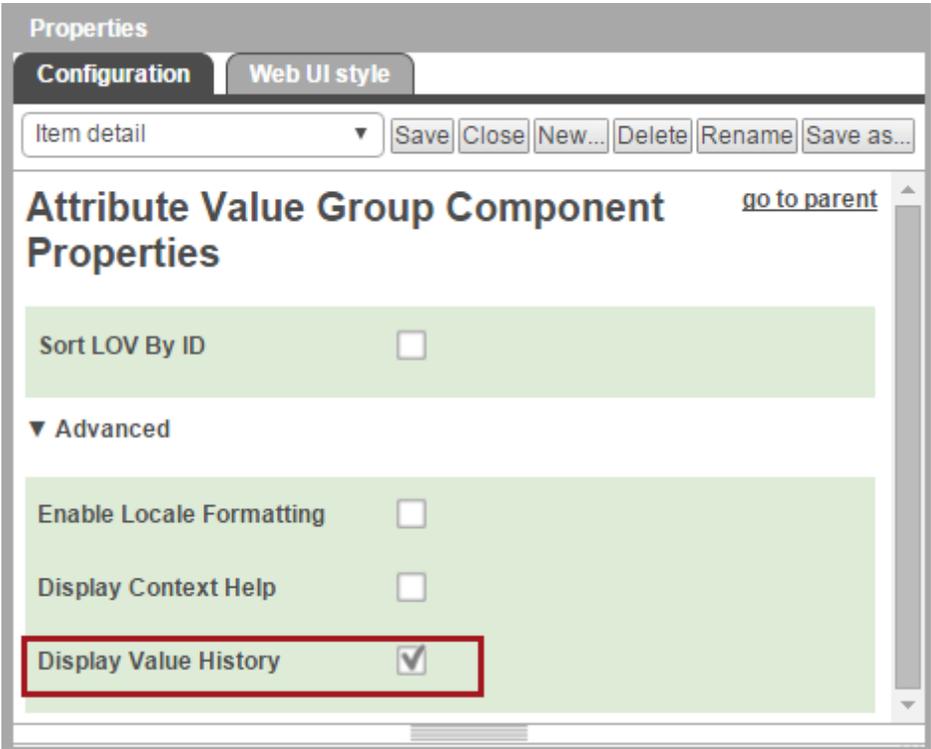
**Note:** Viewing the change history of a given attribute value is only available with the Node Details component and cannot be accessed from table or list components.

---

## Configuring Attribute Value History

In order to have Attribute Value History text show, it needs to be configured in the designer. This can be done on either the **Attribute Value** or **Attribute Value Group** components.

In either component, scroll down to the bottom of the designer window and expand the **Advanced** flipper. Check the **Display Value History** parameter, then save and close the editor.



The 'Display Value History' parameter is checked by default, meaning that attribute value history is enabled. To disable, simply uncheck the parameter and save the configuration.

# Background Process List Screens

In order to see a list of Background Processes (BGPs) in Web UI, a Background Process Screen needs to be configured. This way a user can easily track a list of active, ended, and failed BGPs such as Imports, Exports, Bulk Updates, Smartsheet downloads / uploads, etc that have been initiated by users in the Web UI.

**Background Processes List** ⚙️ 🏠

📄 📄 📄 📄

Started By	Description	TemplateID	ID	Progress	Start Date	Finish Date	Result
USER2	<a href="#">Importing</a>	Import Manager Pipelin	<a href="#">BGP_137631</a>	✔ Succeeded	3/14/16 4:09 PM	3/14/16 4:09 PM	
USER2	<a href="#">Importing</a>	Import Manager Pipelin	<a href="#">BGP_137632</a>	✔ Succeeded	3/14/16 4:10 PM	3/14/16 4:10 PM	
USER2	<a href="#">Profiling Product A</a>	Data Profiler	<a href="#">BGP_137739</a>	✔ Succeeded	3/14/16 4:19 PM	3/14/16 4:19 PM	
USER2	<a href="#">Profiling Hats and Caps</a>	Data Profiler	<a href="#">BGP_137765</a>	✔ Succeeded	3/14/16 4:20 PM	3/14/16 4:21 PM	
USER2	<a href="#">BGP_138621 (Count) 5</a>	Downloading nodes wi	<a href="#">BGP_138621</a>	✔ Succeeded	3/15/16 11:12 AM	3/15/16 11:12 AM	📄
USER2	<a href="#">BGP_138622 2 SKU(s)</a>	Downloading nodes wi	<a href="#">BGP_138622</a>	✔ Succeeded	3/15/16 11:21 AM	3/15/16 11:21 AM	📄
USER2	<a href="#">BGP_138623 1 SKU(s)</a>	Downloading nodes wi	<a href="#">BGP_138623</a>	✔ Succeeded	3/15/16 11:25 AM	3/15/16 11:25 AM	📄

## Setting up the Background Process Screen

1. Start by creating a new screen of the type **Background Processes Screen** and mapping it using the **Background Process List Condition**.
2. Once the screen has been created and mapped, it can be configured by selecting it from the dropdown in the upper left corner of the Web UI Designer window. Add a **Title** and under Child components, and add a **Node List**. Then click on **go to component**.

**Properties**

**Configuration** | **Web UI style**

Background process list ▼ Save Close New... Delete Rename Save as...

**Background Processes Screen Properties**

**Component Description** Screen for displaying a list of active, ended, and failed Background Processes. The screen has been preconfigured with a Node List and a Table Display Mode.

**Title** Background Processes List

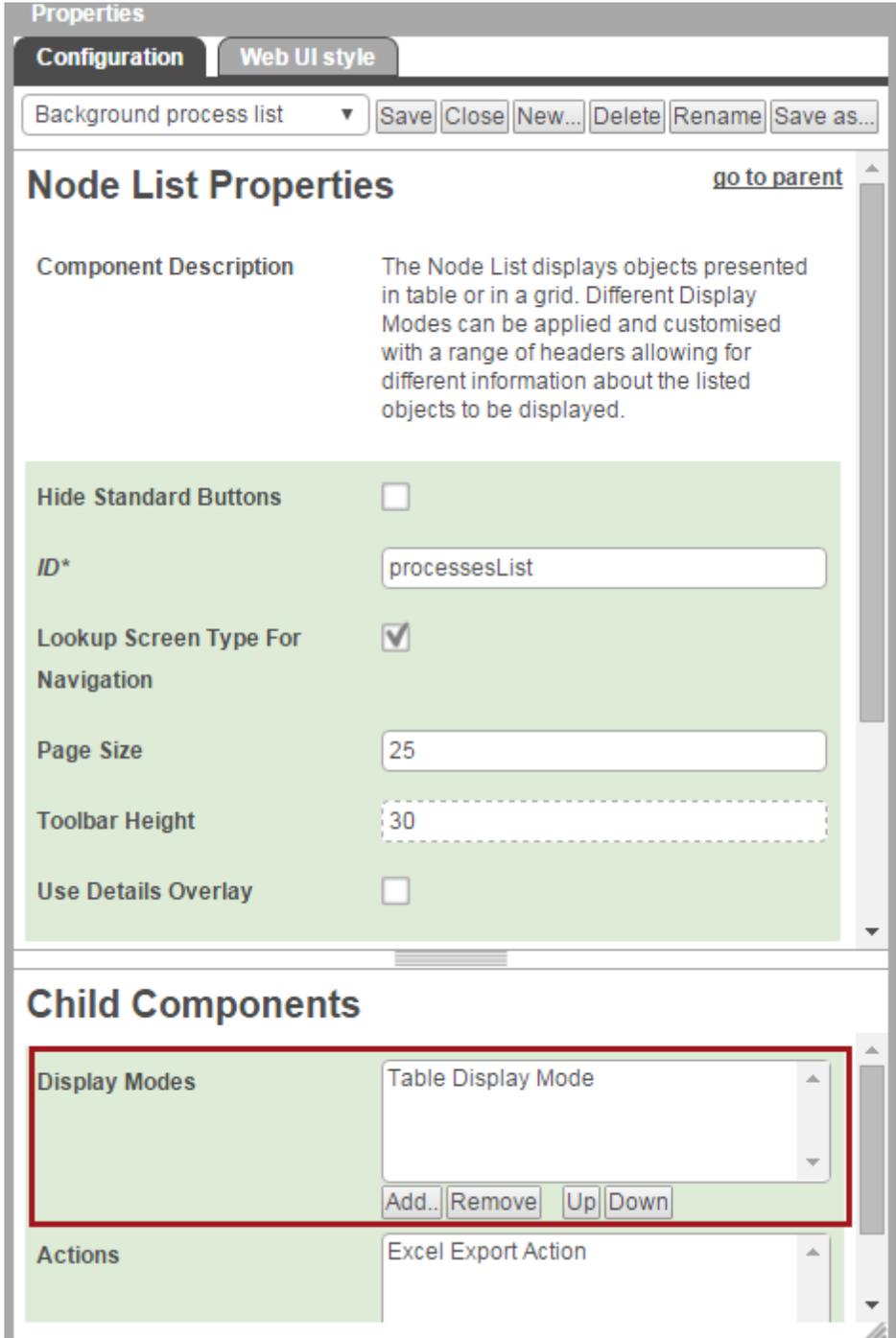
▶ **Advanced**

---

**Child Components**

**Node List** Node List ▼ **go to component**

- 3. On the **Node List** screen under Child Components, it is recommended to add a **Table Display Mode** under **Display Modes**. Double click on **Table Display Mode**.



- 4. On the **Table Display Mode** screen, **Headers** should be configured according to user needs, although it is recommended to add the following headers: **Started By**, **Description**, **Template ID**, **ID Header**, **Progress**, **Start Date**, **Finish Date**, and **Result**.

Headers	Returned Value
Started By	Allows users to adjust and select filters as needed in the column header. <b>Started by Me</b> is the default filter.
Description	Returns the Background Processes names (if available).
Template ID	Describes the type of template used for the BGP
ID Header	Provides the automatically generated BGP ID given to the process
Progress	Gives the status of the BGP
Start Date	The date and time that the BGP started
Finish Date	The date and time that the BGP finished
Result	If available, the completed file that can be downloaded

- Once all desired Headers are added, scroll down and make sure that filtering is enabled on Table Display Mode. Save and close the designer.

## Table Display Mode Properties [go to parent](#)

Context Help

Headers 

Started By Header  
 Description header  
 Template ID Header  
 ID Header (true)

Show Details

▼ Sizing and filtering

Columns Resizable

Display Mode Height

Enable Filtering

Min Columns Width

### Child Components

This completes the basic configuration required to display a list of BGPs in Web UI. Additional advanced configuration options related to background processes are described below.

## Background Process Messaging and Identification

Background processes by default are identifiable by an autogenerated ID. However, should a user wish to have a more detailed or user-friendly BGP description to be displayed, this can be done by via configuration of the **Process Description** field available on actions that launch BGPs throughout Web UI. The full list of components containing the **Process Description** field for naming background processes is below:

- Bulk Update Action
- Bulk Update List Action
- Create Collection Action
- Create Publication from Existing Action
- Download Assets Action
- Excel Export Action
- Excel Export All Action

- Export Action
- Generate PDF
- Print on demand
- Reflow from next column
- Simple Export Action
- Simple Importer Widget
- Smart Sheet Export Action
- Smart Sheet Import Widget

In addition to having an action-related message displayed, users can also configure BGP Node Lists to display a configured message using the **Description header** component, which will display the message defined by the associated action.

To create more detailed background process descriptions:

1. Navigate to a Node List Properties screen and add the desired **Actions** under Child Components.

The screenshot shows a configuration window for a 'Tasklist' in 'Web UI style'. The 'Node List Properties' section includes a 'Hide Standard Buttons' checkbox and an 'ID\*' field containing 'UTL'. The 'Child Components' section has two lists: 'Display Modes' (Table, Film Strip, Gallery, Multi Edit) and 'Actions' (Submit From Grid). Both lists have 'Add..', 'Remove', 'Up', and 'Down' buttons. The 'Add component' dialog is open, showing a list of actions. 'Excel Export Action' is highlighted in blue. A red arrow points from the 'Add..' button in the 'Actions' list to the 'Excel Export Action' in the dialog. The dialog also includes a description for the selected action, a filter field, a 'Show deprecated components' checkbox, and 'Add' and 'Cancel' buttons.

2. Double click on the added Action and navigate to the **Process Description** field.

Properties (edited)

Configuration Web UI style

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

### Excel Export Action Properties [go to parent](#)

**Component Description** This action can be added to a UserTaskList for downloading the items in the current state in an Excel file

**Attribute Groups**    
 Add... Remove Up Down

**Label**

**No Selection Message**

**Process Description**

**Show Only Read Access**

3. Here a combination of static text and action **Placeholders** can be added to return a coherent naming to the background process taking place if available.

The available **Placeholders** to use and their areas of use are listed below:

Placeholder	Returned Value	Notes on Availability
{Action}	Type of action taking place	Available on <b>ALL</b> actions.
{Configuration}	Import / Export / Bulk configuration	Available <b>ONLY</b> for: <ul style="list-style-type: none"> <li>• Bulk Update Action</li> <li>• Bulk Update List Action</li> <li>• Smart Sheet Export Action</li> <li>• Smart Sheet Import Widget</li> <li>• Simple Importer Widget</li> <li>• Simple Exporter Action</li> </ul>

Placeholder	Returned Value	Notes on Availability
{ImportFile}	Name of import file	Available <b>ONLY</b> for: <ul style="list-style-type: none"> <li>• Bulk Update Action</li> <li>• Bulk Update List Action</li> <li>• Smart Sheet Export Action</li> <li>• Smart Sheet Import</li> <li>• Simple Importer Widget</li> </ul>
{WorkflowName}	Name of the workflow in which the items are currently located in	<b>NOT</b> Available for: <ul style="list-style-type: none"> <li>• Create Publication from Existing</li> <li>• Smart Sheet Import Widget</li> <li>• Simple Importer Widget</li> <li>• Print on Demand Action</li> </ul>
{WorkflowState}	Workflow state in which the items are currently located in	<b>NOT</b> Available for: <ul style="list-style-type: none"> <li>• Create Publication from Existing Action</li> <li>• Smart Sheet Import Widget</li> <li>• Simple Importer Widget</li> <li>• Print on Demand Action</li> </ul>
{ItemCount}	Returns the number of selected objects to be processed by the action	<b>NOT</b> Available for: <ul style="list-style-type: none"> <li>• Create Publication from Existing Action</li> <li>• Smart Sheet Import Widget</li> <li>• Simple Importer Widget</li> <li>• Simple Exporter Action</li> <li>• Reflow from next column action</li> <li>• Print on Demand Action</li> </ul>
{StatusFlag}	Return the name of the status flag	Available <b>ONLY</b> for: <ul style="list-style-type: none"> <li>• Create Collection Action</li> <li>• Download Asset Action</li> </ul>

Placeholder	Returned Value	Notes on Availability
		<ul style="list-style-type: none"> <li>• Generate PDF Action</li> <li>• Smart Sheet Export Action</li> <li>• Simple Exporter Action</li> <li>• Reflow from next Column Action</li> </ul>

For example, if the following was written in the Process Description field of an export from a workflow: **Exported item {ItemCount} from {WorkflowName} to {WorkflowState} state with the {StatusFlag} status flag**, it would return the message shown below to the user when the BGP is initiated.

**Order Process**

Creation of background process initiated BGP\_177679 (Exported item 1 from Order Process to Review data state with the Error status flag)

Parent	Thumbnail	Assigned	ID	Workflow	Title	Object Ty	State	Status fla
Beds Items		<input type="checkbox"/>	<a href="#">132500</a>	undefined	<a href="#">sheets</a>	Item	<a href="#">132500</a>	Normal
Beds Items		<input type="checkbox"/>	<a href="#">134892</a>	undefined	<a href="#">Comfy Bed tv</a>	Item	<a href="#">134892</a>	Error
Beds Items		<input checked="" type="checkbox"/>	<a href="#">134894</a>	undefined	<a href="#">Comfy Bed dr</a>	Item	<a href="#">134894</a>	Error
Beds Sales Items		<input type="checkbox"/>	<a href="#">22163</a>	undefined	<a href="#">Bed Frame S</a>	SalesItem	<a href="#">22163</a>	Normal

1-5 of 5

In addition, if the Description header has been added to the Node List configuration (generally via the Table Display Mode), the description will also appear in the BGP list.

### Table Display Mode Properties [go to parent](#)

**Component Description** Shows the nodes from a Node List in a table.

**Context Help**

**Headers**  
Progress Header  
Started Date Header  
Finished Date Header  
Result Header

1

**Show Details**

---

#### Add component

Child Count Header  
Deduplication Header  
2 **Description header**  
Finished Date Header  
ID Header  
ID Shared Target Header  
Name Header  
Object Type Header

Table header that shows the configured description of the items in the table.

Filter

Show deprecated components

3

#### Background Processes List ⚙️ 🏠

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Started By	Description	TemplateID	ID	Progress	Start Date	Finish Date
USER2	Generate Match Code Values: Find Similar Match Code: FindSimilarMatchCode	Match Code Processes	BGP_168154	✓ Succeeded	4/5/16 2:25 PM	4/5/16 2:25 PM
USER2	Exported item 3 from Order Process to Review data state with the status flag	Downloading nodes with fields	BGP_177677	✓ Succeeded	4/11/16 5:12 PM	4/11/16 5:12 PM
USER2	Exported item 1 from Order Process to Review data state with the status flag	Downloading nodes with fields	BGP_177678	✓ Succeeded	4/11/16 5:16 PM	4/11/16 5:16 PM
USER2	Exported item 1 from Order Process to Review data state with the Error status flag	Downloading nodes with fields	BGP_177679	✓ Succeeded	4/11/16 5:18 PM	4/11/16 5:18 PM

## Calculated Attributes in Web UI

A calculated attribute is an attribute whose value is determined by a value template that includes a formula of functions and arguments and/or static text. A value template can also give access to information from references, compare data between objects, round numbers, modify text, and many other options, which are defined in the **Calculated Attribute Functions Overview** section of the **System Setup / STEP Super User Guide**.

Calculated attributes are created in the workbench System Setup attribute editor using the Calculated field on the Attribute tab and the Web UI Attribute Management screen. Both description attributes and specification attributes can be set as calculated attributes.

When an attribute is set as calculated, a Value template field displays.

Functions perform predefined actions on the argument(s) that are supplied. Arguments are placeholders for data (like an attribute ID or text that should be appended to a value). The following functions and arguments are included in the workbench example below:

- The 'concatenate' function takes a comma-delimited list of arguments. In this example, the three arguments are: `prodval('Domestic Distribution ID')`, `"-"`, and `prodval('International Distribution ID')`.
- The 'prodval' function takes an argument of an attribute ID and retrieves the value of the attribute identified. In this example, the two attribute IDs are: 'Domestic Distribution ID' and 'International Distribution ID'.
- Assuming that the 'Domestic Distribution ID' value is 1234 and the 'International Distribution ID' value is 5678, the result of this Value template would be 1234-5678.

System Setup		Calculated Attribute	
Attribute Groups		Attribute	
Attribute Group		References	
Attribute Group		Attribute Transformation	
Attribute A		Validity	
Attribute B		Profile	
Attribute C		Log	
Attribute Q		State Log	
Attribute Z		Tasks	
Biodegradable		Description	
Calculated Asset File Name		Name	Value
Calculated Attribute		ID	CalcAttr
Condition		Name	Calculated Attribute
Condition2		Last edited by	2015-11-05 15:29:33 by USER2
Description Attribute 1		Full Text Indexable	No
Domestic Distribution Number		Externally Maintained	No
Family-Level Key Attribute		Hierarchical Filtering	None
Has Lead		Calculated	Yes
Hazmat		Type	Description
		Dimension Dependencies	
		Value template	concatenate(prodval('Domestic Distribution ID'), '-', prodval('International Distribution ID'))
		Mandatory	No

When a calculated attribute uses the validation base type of Embedded Number, Fraction, Integer, Number, or Numeric Text, a **Unit template** field displays. This field can hold a static Unit ID and/or an expression that evaluates to a Unit ID.

The screenshot shows the 'System Setup' interface. On the left, a tree view under 'Attribute Groups' shows 'Attribute Group' expanded to 'Calculated Attrs', with 'Calculated Unit' selected. On the right, the 'Attribute' details screen for 'Calculated Unit' is displayed. The 'Description' tab is active, showing a table of attributes and their values. Two rows are highlighted with red boxes: 'Calculated' (Yes) and 'Unit template' (unitofvalue('NUMBER1id')).

Name	Value
ID	CalcUnit
Name	Calculated Unit
Last edited by	2016-05-04 17:34:15 by USER
Full Text Indexable	No
Externally Maintained	No
Hierarchical Filtering	None
Calculated	Yes
Type	Specification
Dimension Dependencies	
Value template	value('Color')
Unit template	unitofvalue('NUMBER1id')
Mandatory	No

Read more about setting up and using calculated attributes in the:

- **Calculated Attributes** section of the **System Setup / STEP Super User** documentation
- **Attribute and LOV Creation and Maintenance Configuration** section of the **Web User Interfaces / Using a Web UI** documentation

## Identifying Calculated Attributes

Once a calculated attribute is set up, users can quickly identify a calculated attribute value that is configured to display in Web UI using a Node Editor (e.g., details screen) or a Node List (e.g., Multi Edit Display Mode). And, by looking at the icons, a user can also easily tell if the calculated attribute value shown on the screen has been overwritten with another value.

- *fx* indicates a calculated attribute displaying the calculated value

EVN-06
8083
Item
Classification 1 root   Suppliers   Products Galore <i>fx</i>
http://www.stibosystems.com <i>fx</i>

- *fx* indicates a calculated attribute displaying an overwritten (edited) value



## Editing Calculated Attributes

If an existing calculated attribute value needs to be edited, the user will take these steps:

1. Click the edit icon (  ) found to the right of the value field or double-click the table cell where the attribute is displayed, whichever method applies.
2. An 'Edit Calculated Attribute Value' dialog box will display. Make a radio button selection and enter / edit the value entry, if applicable. Then click OK.
  - The default setting is 'Enter overwrite value.' Users can edit the current value shown or completely clear the data and then replace it with a new value.
  - Or, the user may choose 'Revert to calculated value' and return to the original value.



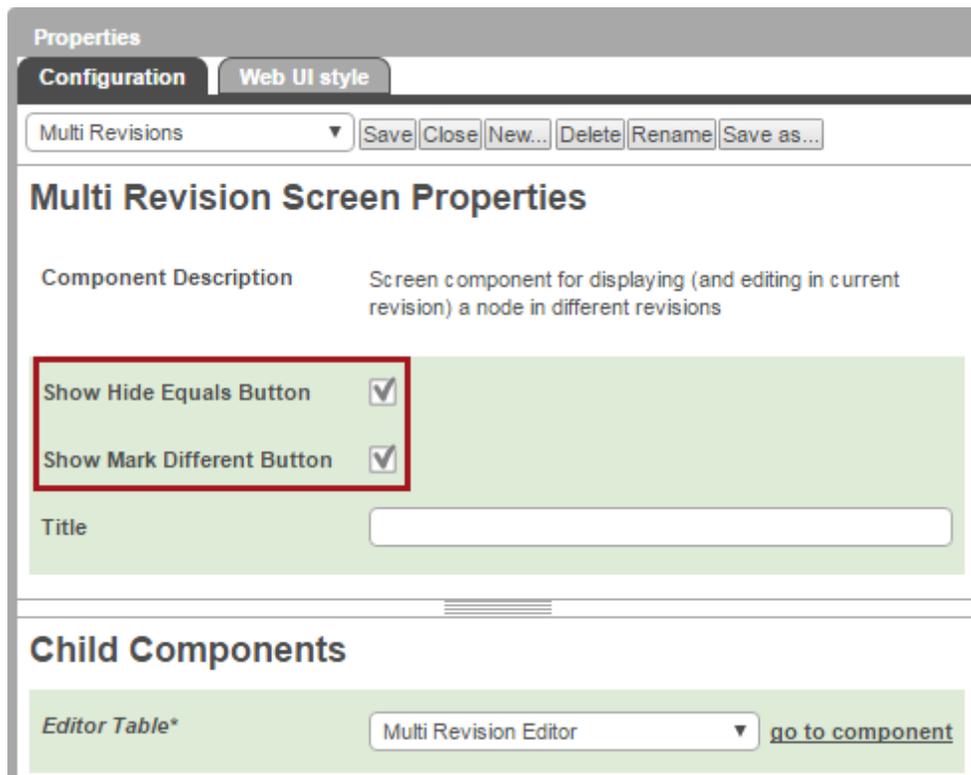
3. If making edits within rows of a Node Editor screen, click the Save button to see the changes. Changes are reflected automatically when users exit out of a table cell. However, depending on the display configuration, the user may still need to save any changes before moving to another screen.

## Comparing Data Using Hide Equal and Mark Different

A number of components in Web UI offer the ability to easily identify differences and similarities between multiple objects via the 'Hide Equal' and 'Mark Different' actions. The 'Hide Equals' action hides all equal values from the user, while the 'Mark Different' action highlights all values that are different. These actions are available on the following components: Golden Record Members, Multi Workspace Screen, Multi Revision Screen, Deduplication Screen, and Potential Duplicates List. For the Deduplication and Potential Duplicates screens these actions are automatically available so long as at least one other action is configured.

For Golden Record Members, Multi Workspace Screen, and Multi Revision Screen components, these actions need to be manually configured.

1. In design mode, navigate to the screen component you wish to configure via the dropdown.
2. In the screen properties for the applicable component, check the 'Show Hide Equals Button' and the 'Show Mark Different Button'.



3. Click **Save**.

### Example

In the image below, the 'Mark Different' action has highlighted the attributes 'Multiplayer' and 'Disc Dimensions' because the displayed revisions have different values for those attributes.

Sales Item

- Basic Information and References
- Cost and Prices
- Status
- Profile
- Translation Screen
- Revisions**
- Multi Worksp.

ID 131530  
 Name Cosmic Horror Game



	ID	Co-op	PvP	Multiplayer	Disc Dimensions
0.10 (CURRENT)	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.9	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.8	131530	2-3 Players			6.7 x 5.3 x 0.5 in
0.7	131530	2-3 Players		No	6.7 x 5.3 x 0.5 in
0.6	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.5	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.4	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.3	131530	2-3 Players		Yes	6.7 x 5.3 x 0.5 in
0.2	131530	2-3 Players		Yes	

In the image below, the 'Hide Equals' action hid the 'Co-op' and 'PvP' attribute values (pictured above) because the displayed revisions have the same values for those attributes.

Sales Item

- Basic Information and References
- Cost and Prices
- Status
- Profile
- Translation

ID 131530  
 Name Cosmic Horror Game



	ID	Multiplayer	Disc Dimensions
0.10 (CURRENT)	131530	Yes	6.7 x 5.3 x 0.5 in
0.9	131530	Yes	6.7 x 5.3 x 0.5 in
0.8	131530		6.7 x 5.3 x 0.5 in
0.7	131530	No	6.7 x 5.3 x 0.5 in
0.6	131530	Yes	6.7 x 5.3 x 0.5 in
0.5	131530	Yes	6.7 x 5.3 x 0.5 in
0.4	131530	Yes	6.7 x 5.3 x 0.5 in
0.3	131530	Yes	6.7 x 5.3 x 0.5 in
0.2	131530	Yes	

## Conditional Attribute Handling

It is often the case that some attributes may become relevant only if other attributes hold certain values. For example, attributes specific to hazardous materials may become valid if the attribute 'Has Lead' has a value of 'Yes'.

To facilitate this, STEP allows for conditions to be stored on attributes. This enables business users to steer the Web UI and Smartsheets behavior for end users without requiring use of the STEP Web UI Designer.

It is recommended that attributes used for conditional validity (whether as the conditional attribute or as part of a conditional expression) do not have dimension dependencies.

The conditional attribute should be used on any other attribute in the system. This means that it can be metadata on the attribute (or attribute link) to indicate the conditions under which the attribute it is applied to should be displayed.

---

**Note:** Conditional attribute support does not apply to STEP Workbench as all attribute visibility in the workbench is determined solely by user privileges.

---

For information about setting up conditional attributes, see the [Setting Up Conditional Validity Attribute](#) section in [Conditional Attributes](#).

### Conditional attributes handling in Web UI

A number of Web UI components centered around the Task List and Node Editor components are enabled to deal with the conditional validity of attributes. These components honor the conditional validity settings and only allow for display and/or editing of attribute values if they are valid based on the driving conditions.

For example, notice that the 'Hazmat' attribute is available when 'Has Lead' is set to 'Yes', but is unavailable when 'Has Lead' is left unpopulated (or set to 'No').

**Product attributes** | References and Classifications | Referenced By | Ir

Primary Image 

ID L7219

Name\* Flex Mount

Object Type Onboarding SKU

Approval status ✘ Not approved.

Description Quality wall mount that can be easily adjusted to fit most televisions.

Selling Points

**Has Lead** Yes

Hazmat

**Product attributes** | References and Classifications | Referenced By | Ir

Primary Image 

ID L7219

Name\* Flex Mount

Object Type Onboarding SKU

Approval status ✔ Context approved on 6/8/15 4:40 PM

Description Quality wall mount that can be easily adjusted to fit most televisions.

Selling Points

**Has Lead**

Conditional attribute functionality can be used with Web UI elements:

- ParentValue
- TargetAttributeColumn

- TargetAttributeLinkColumn
- TargetValueHeader
- Value
- ValueHeader
- ValueGroup
- ValueLinkHeader
- ValueGroupHeader

For information on SmartSheets, see the Conditional Attributes Handling information in the SmartSheets documentation.

For information on business rule binds, see the conditional attributes information in the Business Rules information in the STEP documentation.

# Configuring a Deduplication Clerical Review

A clerical review is the process of manually examining pairs that are not clear duplicates or non-duplicates.

During matching, objects that score between the clerical review threshold and the auto threshold are placed in a clerical review workflow. The potential duplicates from the clerical workflow are then displayed in a Web UI where you can review them manually.

---

**Note:** This documentation assumes that you are familiar with STEP Web UI design. If you are new to designing Web UIs, we recommend that you review the **Web User Interfaces / Getting Started** documentation first.

---

For more information about creating a workflow, see the **About STEP Workflows** section of the **Workflows** documentation.

Log in to the Web UI, and then click the gear wheel icon  to enter design mode.

## Create and Configure the Deduplication List

You must place the deduplication list inside a tab page.

1. Click **New**, and then select the **Node Details** screen type.
2. Enter a **Screen ID** and click **OK**.
3. In the **Child components** area, in the **Main** list, select **Tab Control**.
4. Click **go to component** to configure the Tab Control component.
5. Add a **Tab Page** to the Tab Control.
6. On the **Tab Page**, set **Tab Content** to **Deduplication List**.
7. In **Headers**, click **Add**, and then select the attribute headers you want to use for the list. Choose meaningful headers that will assist the user with confirming or rejecting potential duplicates.
8. Select **Auto Submit** if you want the task to be automatically submitted when all duplicate candidates have been confirmed or rejected.
9. If you selected **Auto Submit**, in the **Event** field, specify the workflow event to use after auto submit.
10. In the **Child** components area, click **Add**, and then select the actions **Confirm Duplicate From Grid Action** and **Reject Duplicate From Grid Action**.
11. Click **Save** to save the changes.

Properties - Configuration Saved!

Configuration Portal style

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

Deduplication

### DeduplicationList properties [go to parent](#)

Component Description A component for displaying a tab with a deduplication listview

AutoSubmit

Dimensions <Select an option> Edit...

Event

Headers IDHeader (true)  
NameHeader  
ValueGroupHeader (false / fals  
Add... Edit... Remove  
Up Down

Hide SelectionButtons

PropertyDirection HORIZONTAL

ShowGroupHeaders

UseImmediateSave

### Child components

Actions ConfirmDuplicateFromGridAction  
RejectDuplicateFromGridAction  
Add... Remove Up Down

The 'Hide Equal' and 'Mark Different' actions will automatically appear alongside any other actions configured on the Deduplication List. For more information, see the **Comparing Data Using Hide Equal and Mark Different** section of the **Web User Interfaces / Using a Web UI** documentation.

### To Specify Node Details Buttons

1. Select the **Node Details** screen you just created.
2. In the **Child component** area, from the **Buttons** list, select **Buttons**.

3. Click **go to component**.
4. In the **Child component** area, click **Add**, and then select the **Submit Action**.
5. Double-click the **Submit** action. The **Submit Action Properties** window appears.

In this window, you can specify where the Web UI navigates to after the **Submit** action. You do this by setting up a **Navigate To Handler**. If you cannot see the **Navigate To Handler** list, drag the sizing handle until you can see all properties.

6. In the **Navigate To Handler** list, select **Deduplication Navigate To Handler**.
7. In the **Matching Algorithm ID** field, specify the ID of the relevant matching algorithm.
8. In **State ID**, enter the review state of the clerical review workflow, and then click **Save**.

## To Create a Task List

The next step is to create a screen to hold the Clerical Review task.

1. Click **New**, in the **Add Screen** window, select **Task List**, and then click **Add**. The **Task List Properties** window appears.
2. In the **Child component** area, in the **Node List**, choose **Node List**.
3. In the **Node List Properties** window, in the **ID** field, enter an ID for the Node List, and then click **Add**.
4. In the **Task List Properties** window, in the **Child components** area, click **go to component**. The **Node List Properties** window appears.
5. In the **Child components** area, in **Display Modes**, click **Add**.
6. In the **Add component** window, choose **Table Display Mode**, and then click **Add**.
7. Double-click **Table Display Mode**, edit the table properties, and then click **go to parent**. The **Node List Properties** window appears.
8. In the **Child components** area, in **Display Modes**, click **Add**.
9. Choose **Compare Display Mode**, and then click **Add**.
10. Double-click **Compare Display Mode**, and then edit the table properties.
11. In **Headers**, click **Add**, and then select **Deduplication Header**. This header generates the link to the deduplication screen.
12. Add any other headers that you want to use for the list. Choose headers that are meaningful to the users.
13. Click **Save**.

For information about individual table properties, see 'Tables and Lists' in the **STEP Web UI Reference Guide** section of the **Web User Interfaces** documentation.

## To Specify Mappings

1. From the screen list, select **Main** to go to the main screen of the designer.
2. In **Mappings**, click **Add**.
3. In the **Screen Mapping properties** window, in **Conditions**, click **Add**.

4. Select the **Matching Algorithm** condition, and then click **Add**.
5. In the **Screen** list, select the screen you created for deduplication, click **Add**, and then click **Save**.
6. In the **Mappings** list, select the mapping you just created, and then click **Up** to move the screen mapping higher up in the list.

---

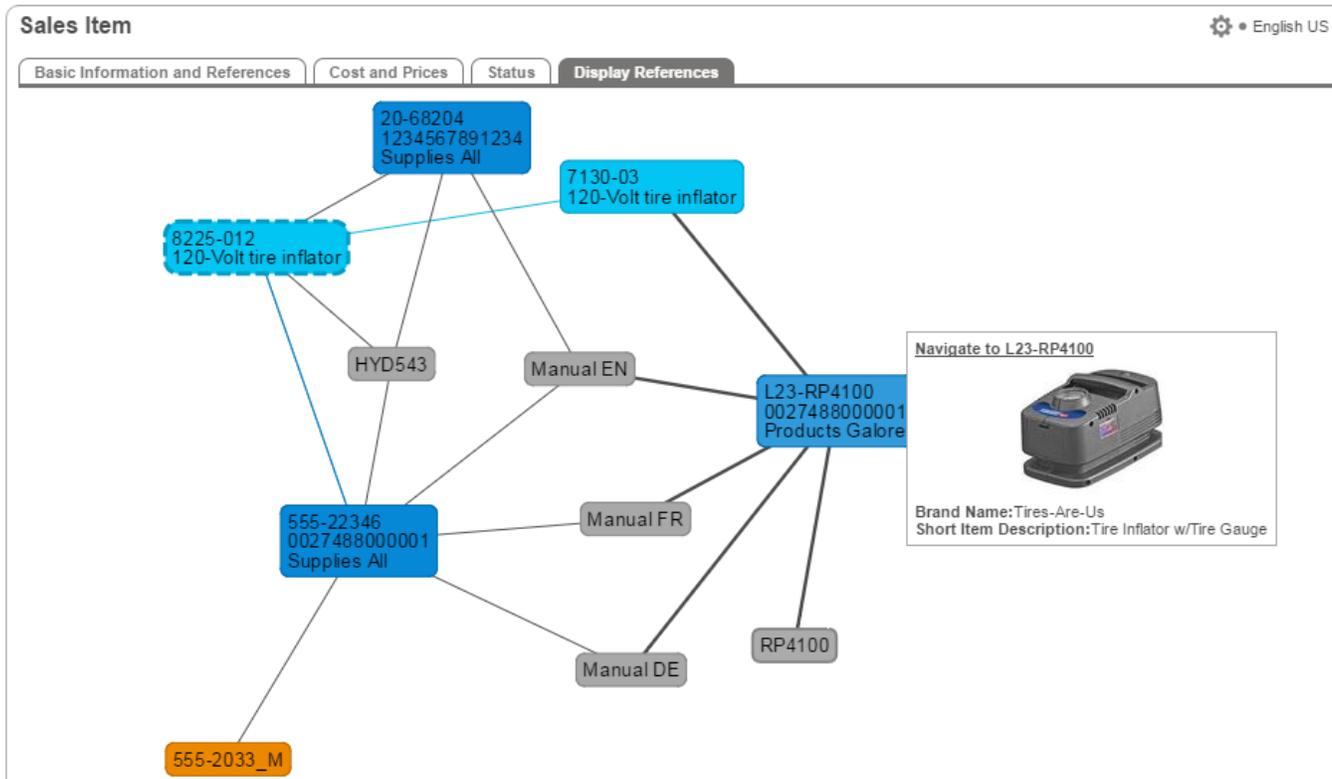
**Note:** You now have to create another mapping.

---

7. In **Mappings**, click **Add**.
8. In the **Screen Mapping properties** window, in **Conditions**, click **Add**.
9. Select the **Status Selector Selection** condition, and then click **Add**. The **Status Selector Selection Condition properties** window opens.
10. In the **Workflow** list, select the clerical review workflow.
11. In the **Select a state list**, select the start state of the clerical review workflow, click **OK**, and then click **Add**.
12. In the **Screen** list, select the TaskList screen you just created, and then click **Save**.
13. In the **Mappings** list, select the mapping you just created, and then click **Up** to move the screen mapping higher up in the list.

# Data Visualization

Data visualization functionality in Web UI allows users to see a visual representation of objects in STEP and how they relate to each other. The visualization of object types and their reference objects can help users better understand data and identify patterns, find better ways to organize objects, and ultimately build better data relationships. The highly customizable interface is interactive, allowing users to click on and mouse over graphical objects on the screen to get more information on an object, expand outward from it to display additional references, or navigate directly to it.



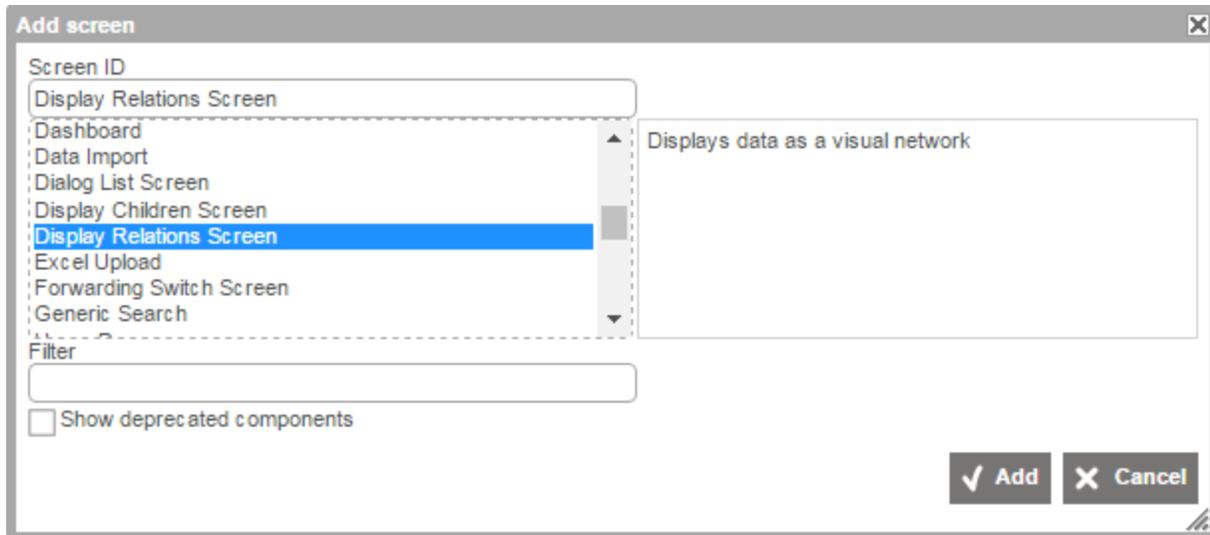
## Configuring Data Visualization Screens and Parameters

All of the configuration steps provided in this topic assume the Web UI designer is in design mode and that all users (designers and end users) have the proper privileges to work with these features. For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

### Creating a New Display Relations Screen

The **Display Relations Screen** screen type is dedicated to visually display objects and references.

1. In the Designer window, click the **New** button in the action icon row.
2. Choose **Display Relations Screen** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable when it is time to configure the screen and/or set up screen mapping.

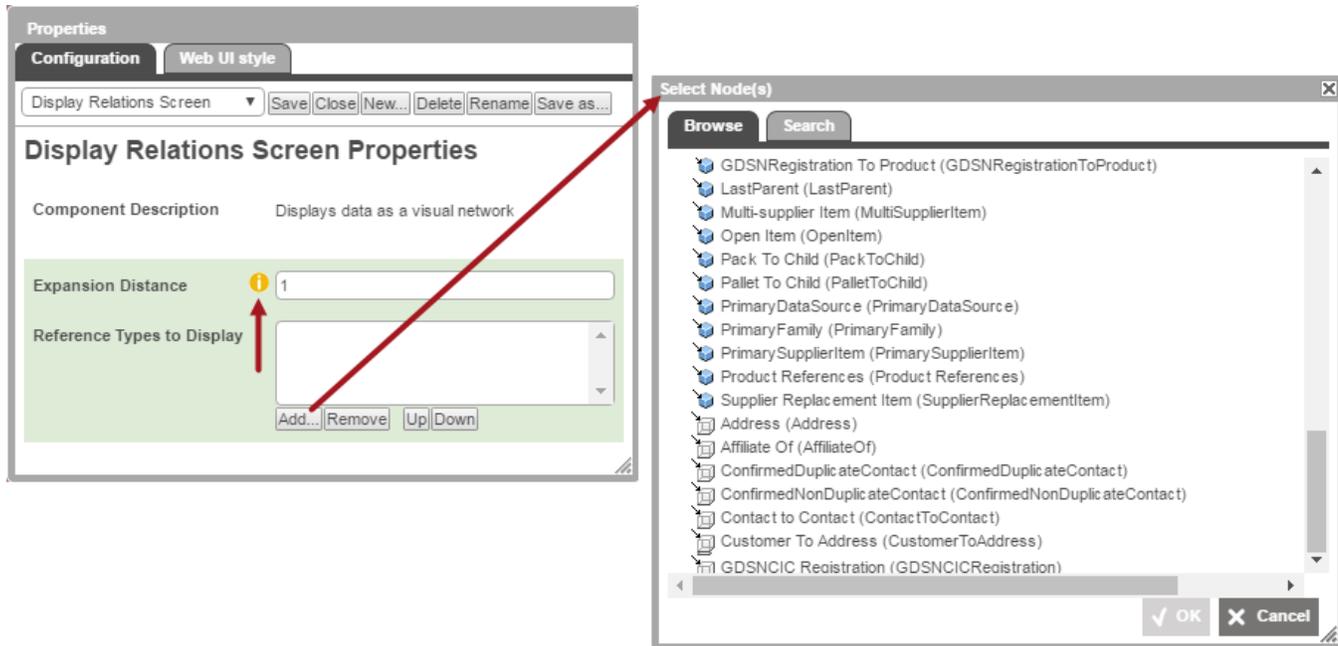


3. Click **Add**.
4. Click **Save** in the Designer window. At this point, either close Designer and configure the screen at a later time, or continue on with the **Display Relations Screen** configuration.

## Configuring a Display Relations Screen

Each parameter should be configured as needed and features help text, accessible by clicking the yellow info icon to the right of each parameter name (as shown in the next screenshot).

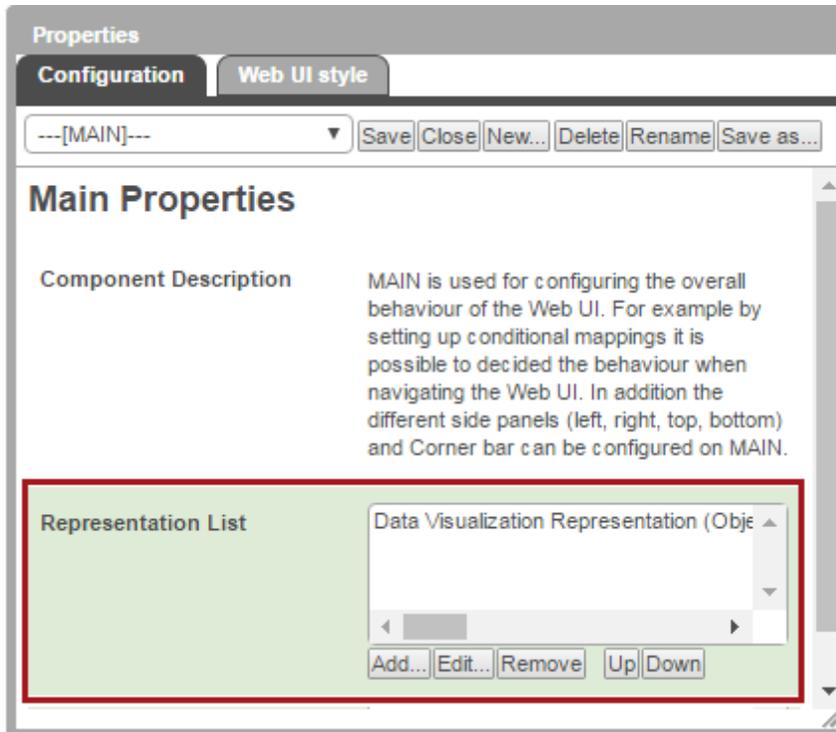
1. Select the **Display Relations Screen** you just created by selecting the screen ID from the screen dropdown.
2. Enter a number in the **Expansion Distance** parameter value field. This must be a whole integer and determines how far the display will branch out from the selected object (e.g., one reference 'step' away from the object or five reference 'steps' away from the object). This determines both the default number of 'steps' shown from the original selection, as well as the expansion distance when an object in the relations screen is clicked. Care should be taken in setting the expansion distance as a high number could cause performance issues. It is recommended to set this number between 1 and 3.
3. Determine which reference types will be displayed. Click **Add** under the **Reference Types to Display** field, and make a selection from the **Select Node(s)** screen. Re-order or remove the Reference Types as needed. If no selection is made, then all reference types will be shown.
4. **Save** the changes.
5. As with any screen, it must be mapped appropriately in **Main Properties > Mappings** for end users to be able to access it. As an alternative to mapping, the Display Relations Screen can be added as a **Sub Screen Tab Page** on a **Node Details** screen.
6. **Close** design mode to return to normal operation, or move on to the **Main Properties** steps to continue the configuration steps.



## Configuring Main Properties

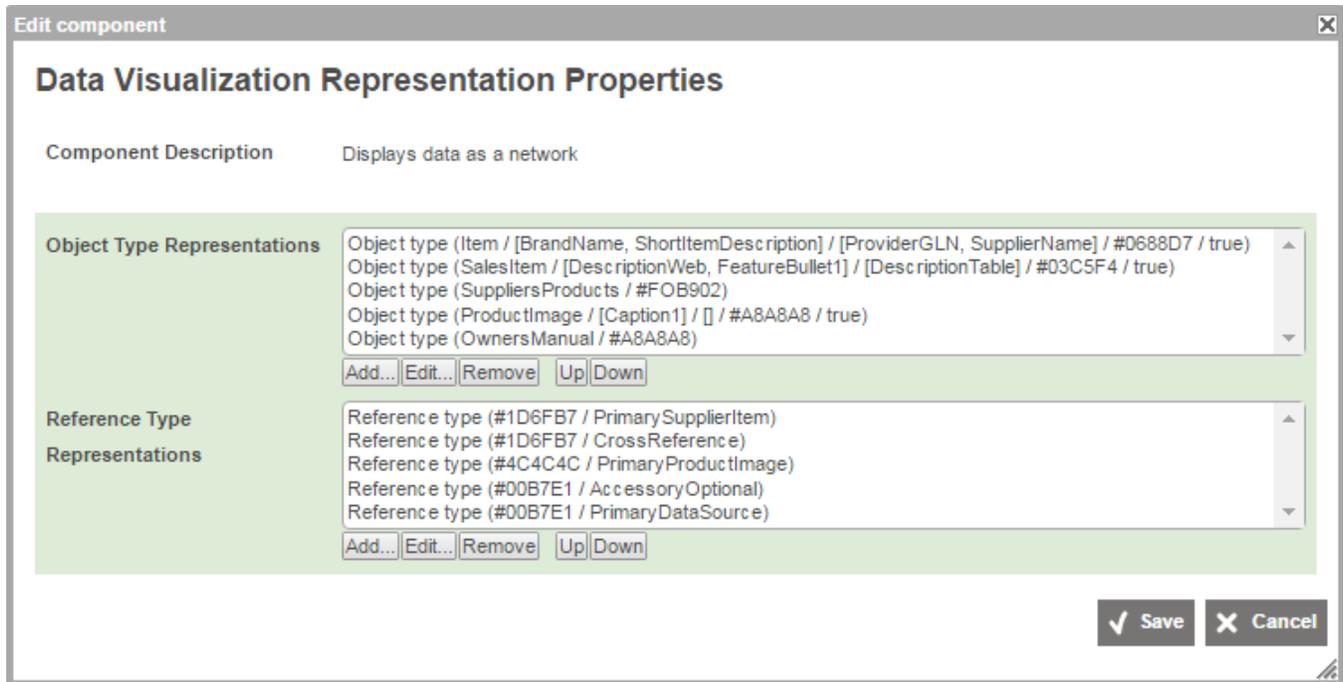
Within the **Main (Screen) Properties**, which are used for configuring the overall behavior of the Web UI, configuration can be done to set up the look of the graphical interface that users will see when using any Display Relations screen. Object type and reference styling only needs to be set up one time, and the selections will be applied to usage throughout a specific Web UI, regardless of how many Display Relations screens are used.

1. Enter design mode and select **---[MAIN]---** from the screen dropdown list.
2. Go down to the **Representation List** parameter.
3. Click **Add** and **Data Visualization Representation** will automatically populate the **Representation List** value field. Double-click **Data Visualization Representation** to open the properties.



Next the **Data Visualization Representation Properties** value fields need to be populated.

For easy identification, you can configure all nodes of the same type (e.g., all assets, all products, all entities, or all classifications) so that all object type nodes under that object structure hierarchy are represented by the same color and same attributes. You can configure display settings on a more granular level, too, or do a combination of both. For example, you can designate all products to display one color / attribute combo except for objects representing direct sellable units, which could be a different color and/or attribute combo). The display settings are highly configurable to fit the needs of your object structure. A sample configuration is shown below.



4. Click the **Add** button under the **Object Type Representations** field.

- Select **Object Type** by clicking the ellipsis button.
- Enter a hex color code in the **Color** field. The format is # plus a six-digit code (e.g., #EC8800). Use this color coding to visually distinguish between different types of data.
- Add individual attributes to the **Attribute List** field. The attribute values will display on the object in the interface. The name of the object displays by default and is not a configurable setting.
- Make **Popup Attribute List** selections. The attribute values will display on the hover information that displays when mousing over the nodes within the interface. The name of the object displays by default along with a link to the object.
- The primary product image will also display on the hover popup if the **Show Popup Thumbnail** parameter is enabled / checked.

**Edit component** [Close]

### Object type Properties

Component Description      Visual representation of an object type

**Object Type\***      SalesItem [Ellipsis]

**Color\***      #03C5F4

**Attribute List**

DescriptionTable [Up] [Down]

Add... Remove Up Down

**Popup Attribute List**

DescriptionWeb  
FeatureBullet1 [Up] [Down]

Add... Remove Up Down

**Show Popup Thumbnail**     

[Save] [Cancel]

- Next, click the **Add** button under the **Reference Type Representations** field.
  - Make **Reference Type** selections using the ellipsis button.
  - Enter a hex color code in the **Color** field. The format is # plus a six-digit code (e.g., #00FFFF). Use this color coding to visually distinguish between different types of data.

**Edit component** [Close]

### Reference type Properties

Component Description      Visual representation of an object type

**Reference Type\***      CrossReference [Ellipsis]

**Color\***      #1D6FB7

[Save] [Cancel]

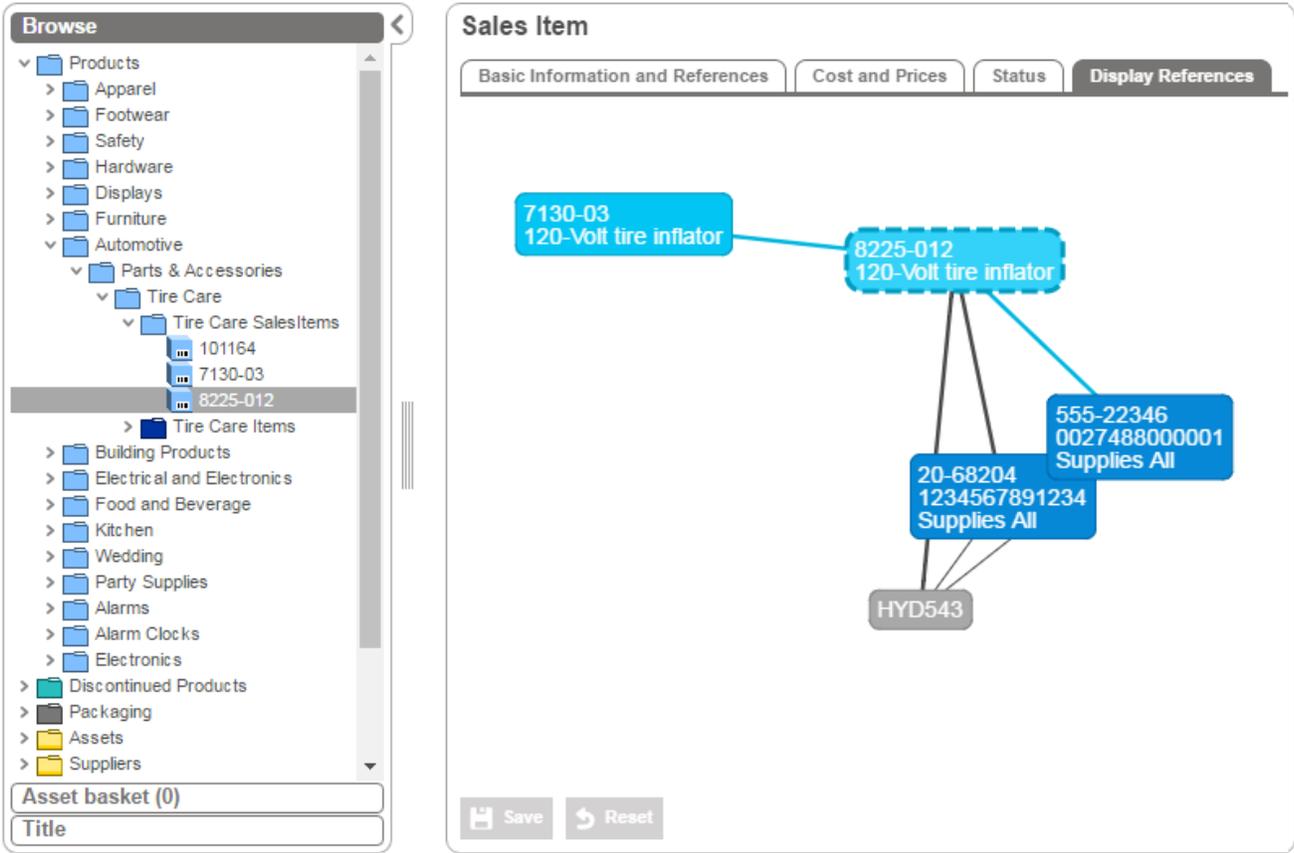
6. Click **Save** in the Designer window and **Close** design mode to return to normal Web UI operation.

### Using Data Visualization

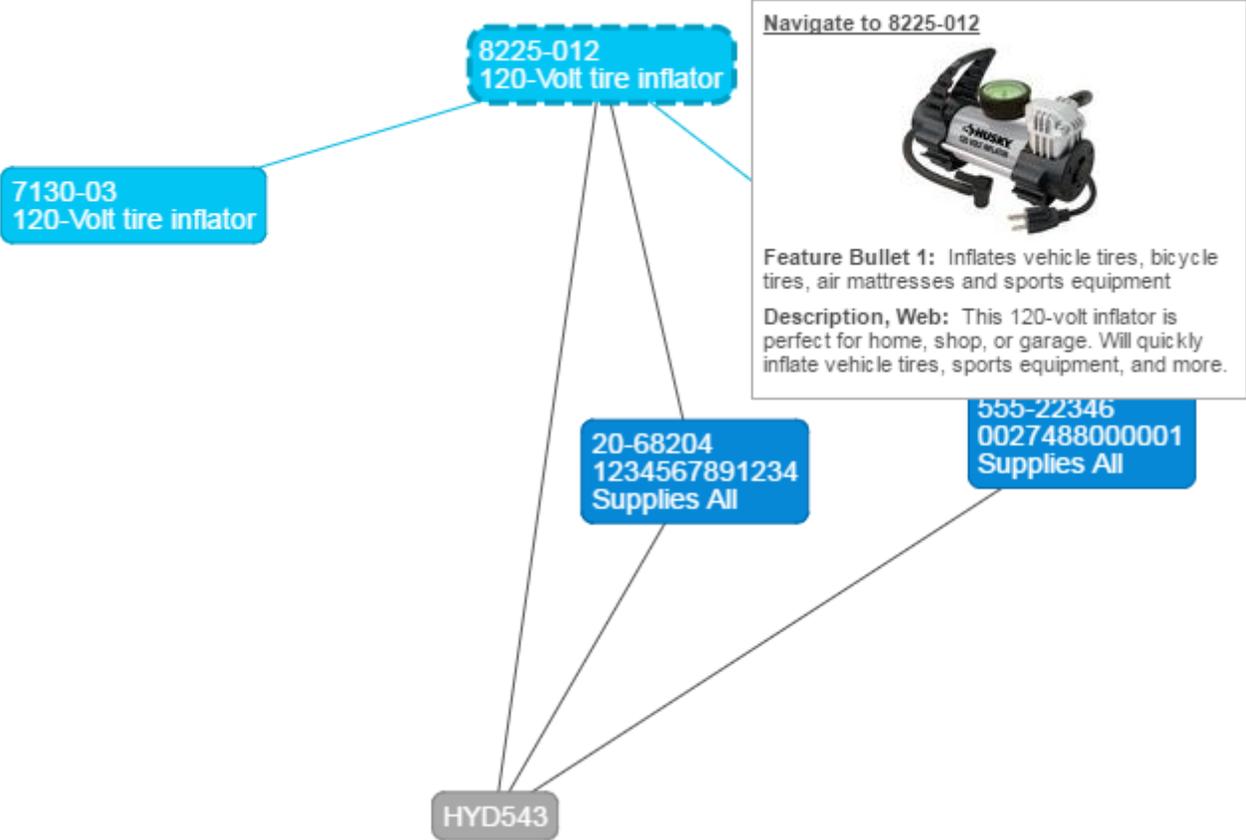
The graphical interface is interactive. When a user clicks on an object, the visual interface displays the object and related objects. If the user clicks on a related object node, then the interface updates based on the new selection. By default, the system displays one (1) 'step' when an object is selected (the object and a single level of references). If the user wants to see more expanded data, then the Expansion Distance parameter can be changed to show more steps.

Here is an example:

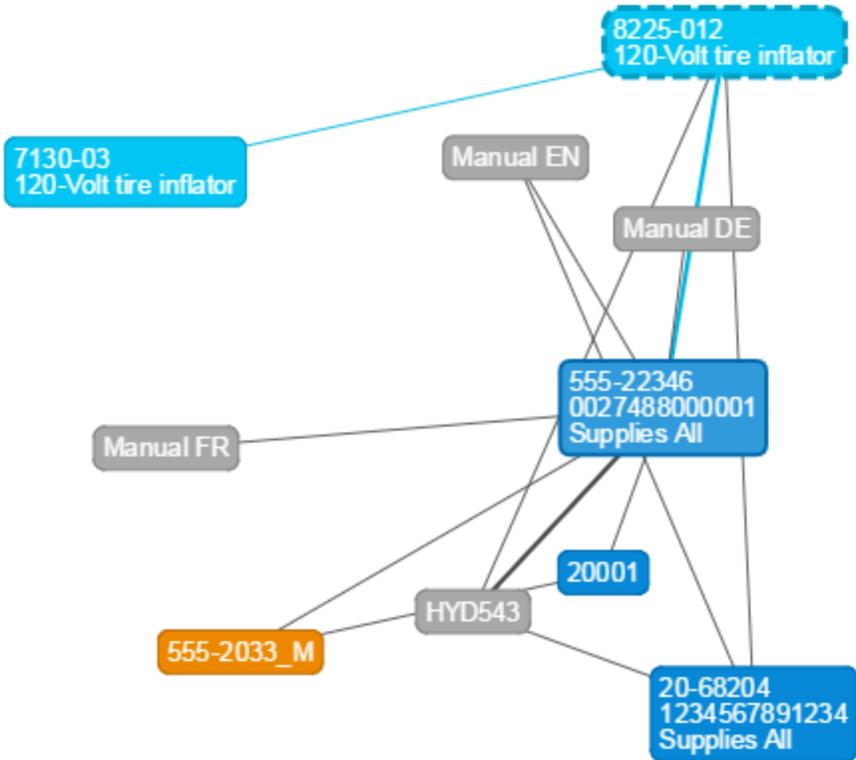
The end user clicks on a Sales Item named 8225-012 and views the graphical interface on a Display Relations screen configured as a Sub Screen Tab Page on a Node Details screen (Sales Item). The object the user is on is identified by the dotted line around the node.



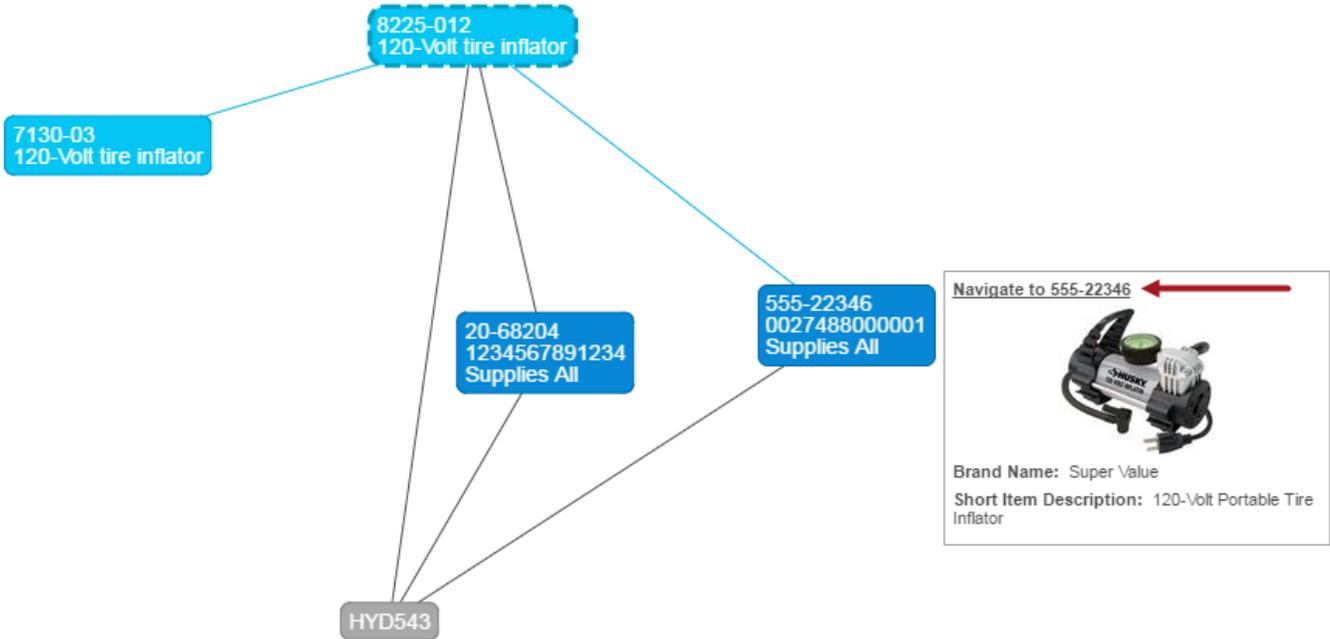
Mousing over the object node displays a hover popup showing the primary product image and configured attributes.

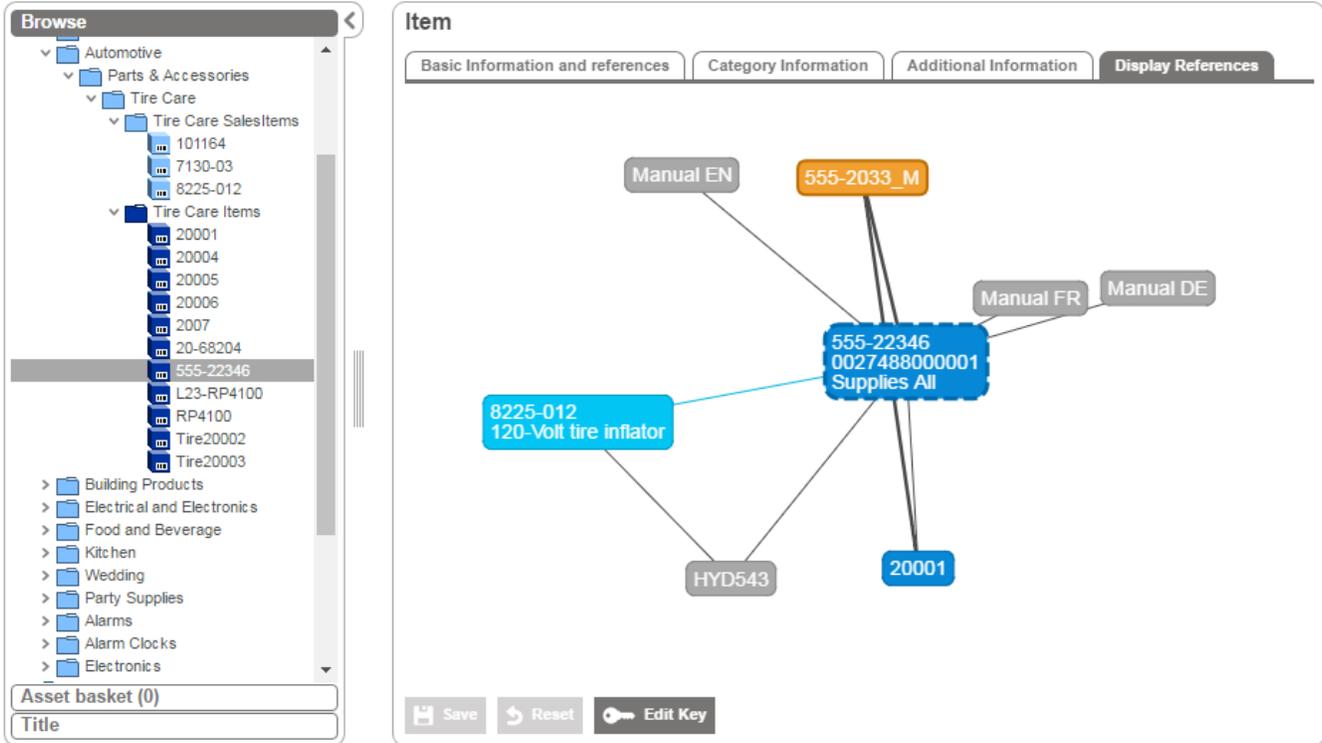


Clicking on a reference node (555-22346) adjusts the visual representation accordingly.



Alternatively, mousing over a reference node and then clicking on the 'Navigate to 555-22346' link will take the user to object 555-22346. 555-22346 becomes the new selected object.





Users can also zoom in and zoom out using their mouse scroll on the Display Relations screen. They can click on and move nodes to different positions on the screen (with no impact to data / relationships).

**Important:** The maximum object limit is 500 and controlled by a configurable setting in the sharedconfig.properties file (DisplayRelations.MaxObjectsLimit). If a user clicks on an object or reference object that has over 500 related objects to be displayed on screen, then a message displays that says 'Maximum limit of 500 objects has been exceeded.' Changing the maximum object limit to a higher number is not recommended. In addition, if you experience issues with Web UI performance while using this functionality, you may want to lower the maximum object limit and/or lower the Expansion Distance value to find the optimal setup for your system.

## Handling Duplicated Attributes in Web UI

It is common for attributes to be linked to multiple attribute groups within STEP. This can lead to redundancy and confusion as attributes may appear multiple times on a Web UI screen when configured to display attribute groups that contain overlapping attributes. To manage this, it is possible to indicate groups of attributes that should not be displayed within the Web UI.

Even if duplication is not an issue, a single attribute group or multiple groups may contain sensitive information that should be hidden from view on the Web UI screen. A blacklisted attribute group can be used to hide this sensitive information.

To illustrate this functionality, consider attribute groups X, Y, and Blacklist. The 3 groups contain a variety of attributes, but each includes Attribute A.

If adding the Group Blacklist to the BlacklistedAttributeGroup for Group Y but not for Group X, then Attribute A will display with Group X attributes on the screen, while being omitted from Group Y attributes. This will eliminate duplicates being shown when displaying both groups on the screen.

When Group Blacklist is added as the BlacklistedAttributeGroup for both Group X and Group Y, then neither group will show Attribute A. Alternatively, if nothing is chosen as a BlacklistedAttributeGroup for either Group X or Group Y, then both groups will show Attribute A.

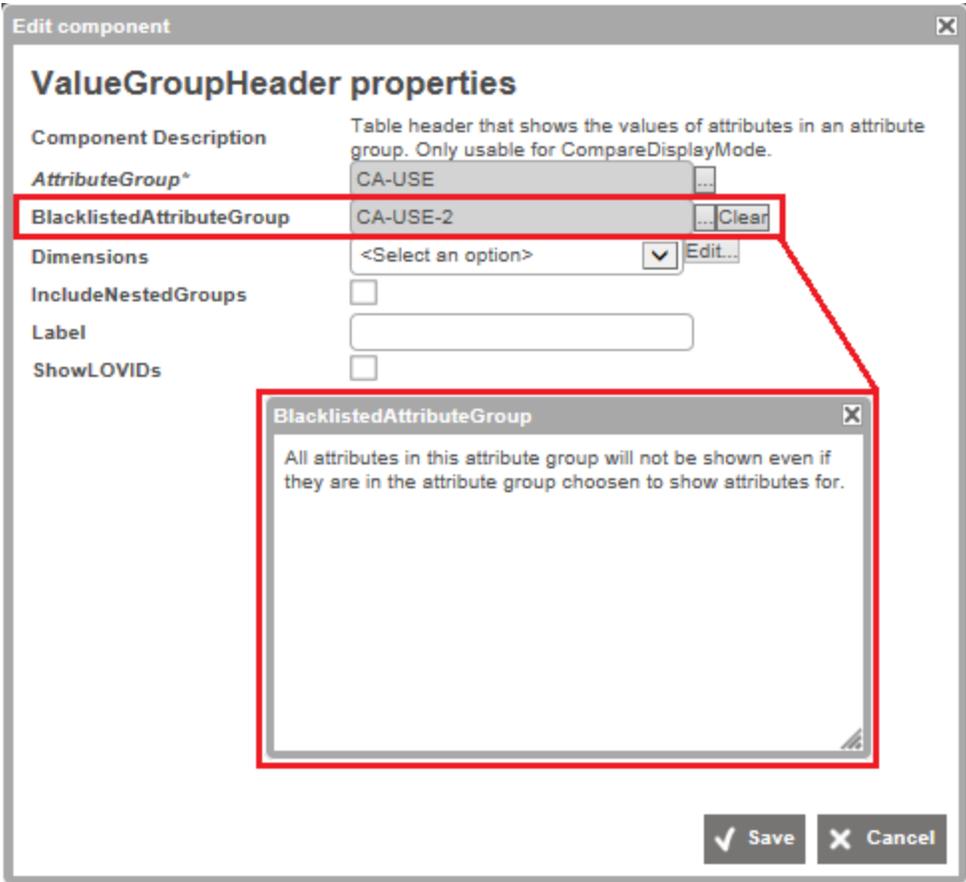
## Create Attribute Group(s) to Hold Attributes Known to Exist in Multiples Groups

In the STEP Workbench, one or more attribute group(s) should be created to specifically hold attributes that should not be displayed within the Web UI.

More information about attributes and creating attribute groups is found under System Setup in STEP Help.

## Setting up Blacklisted Attribute Groups in Web UI

Within the Web UI designer, the ValueGroup and ValueGroupHeader components have a BlacklistedAttributeGroup field which can be populated with an attribute group. This attribute group holds attributes that should not be displayed within the Web UI. Any attributes in the blacklisted attribute group will not appear on the screen. This feature can be used when displaying multiple attribute groups on the screen or even when using a single group.



Selecting a blacklisted attribute group in ValueGroup or ValueGroupHeader has no impact on other attribute groups shown on a screen and within Web UI. Each component operates independently of each other.

---

**Important:** To avoid confusion, it is recommended that any attribute groups created specifically to group blacklisted attributes are named accordingly.

---

## Exporting Web UI Definitions as Comments

Web UI configuration definitions can be exported as comments using Advanced STEPXML. These exports are intended to be used for submission to external source control systems for comparison purposes. Users can import them into source code repository systems where they can be compared from version to version. Editing and/or import of these files is not supported (e.g. users may not export, edit the comments, and re-import in STEP).

To export a Web UI definition for external comparison, Advanced STEPXML must be used and the DefinitionsAsComments tag must be set to 'true'.

### Sample Template to Export Web UI Definitions as Comments

```
<?xml version='1.0'?>  
<STEP-ProductInformation DefinitionsAsComments="true">  
<PortalConfiguration ExportSize="All"/>  
</STEP-ProductInformation>
```

### Example Output for Web UI as Comments:

```
<PortalConfiguration...>  
<!--Definition:  
[Web UI definition goes here. Removed for  
brevity.-->  
[Remaining configuration would populate here]  
</PortalConfiguration>
```

---

**Note:** The content of the comment field is not part of the STEPXML XSD and therefore Stibo Systems reserves the right to change the format of the output content at any time.

---

## Find Similar

In an effort to prevent users from creating duplicate objects in the STEP system, users can use the **Find Similar Action** to identify similar objects prior to initiating new ones when working in Initiate Item screens in Web UI. Also, users can use **Find Similar** functionality to search for and identify similar objects prior to adding references and creating target objects within a Multi-Reference Editor. Using Find Similar allows users to search for potential duplicates on a more granular level.

The key to Find Similar functionality is the **matching setup** that the customer creates and uses for duplicate handling. Every time a user enters data into the search fields and clicks OK, the Find Similar search checks the match code values involved, executes the relevant matching algorithm, and provides a set of results, if any are found. If a user is not getting the results set they expect, then the first place to check is the algorithm configured in the Duplicate Handler parameter in the Add Reference Action Properties. Two bind types work with the Find Similar functionality. They are: **First Match Object** and **Second Match Object**. A relevant Match Code and Matching Algorithm needs to be set up before attempting to use the Find Similar Search tab. For more information about setting up and using matching algorithms, see the **Configuring Matching Algorithms Overview** section of the **Matching and Linking** documentation.

All the steps provided in this topic assume the Web UI designer is in design mode and on the applicable **Properties** screen prior to starting the configuration process. It is also assumed that all users (designers and end users) have the proper privilege to work with these features. For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

## Configuring Find Similar on an Initiate Item Screen

The screenshot shows the 'Initiate Item Properties' configuration screen. At the top, there are tabs for 'Configuration' and 'Web UI style'. Below the tabs is a search bar with the text 'initiate' and buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Initiate Item Properties' and contains a 'Component Description' field with the text: 'Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow'. Below this are several configuration fields: 'Duplicate Handler' (dropdown menu with 'Duplicate Handler' selected and an 'Edit...' button), 'Object Type ID\*' (text field with 'CD\_Contact' and an ellipsis button), 'Root' (text field with 'step://entity?id=ContactsRoot' and a 'Clear' button), and 'Root Product ID' (empty text field). Below these fields is a section for 'Screen configurations' with a 'Forwarding Screen' dropdown menu set to 'CD\_SimpleMatching' and an 'Add' button. There are also expandable sections for 'Business Conditions' and 'Styling'. The bottom section is titled 'Child Components' and contains three rows: 'Main' (dropdown menu with 'Columns Control' and a 'go to component' link), 'Buttons' (dropdown menu with 'Buttons' and a 'go to component' link), and 'Breadcrumb' (dropdown menu with '<Select a child compo' and a 'go to component' link).

1. Create a new **Initiate Item** screen or use an existing one.
2. In **Initiate Item Properties**, select **Duplicate Handler** in the dropdown for the **Duplicate Handler** parameter.
3. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis to the right of the value field and select a matching algorithm. Click **Save**.

**Edit component** [X]

### Duplicate Handler Properties

**Component Description** This parameter component can be used to configure a Duplicate Handler for the Initiate Item component. It cannot be used as a stand-alone component.

**Detail Screen\*** homepage [v] Add

**Editor Screen\*** homepage [v] Add

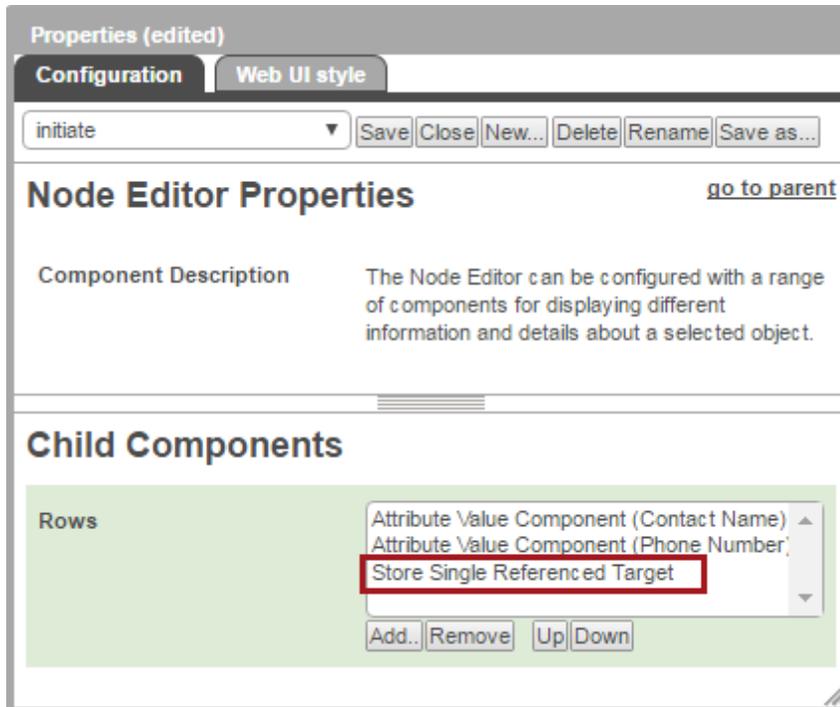
**Matching Algorithm\*** FindSimilarMatchingAlgorithm [...]

**Threshold** 80

**Window Size** 10

✓ Save ✕ Cancel

4. Click the ellipsis to the right of the **Object Type ID** parameter to select the object type of the objects that will be initiated in to STEP.
5. Select a **Root** using the ellipsis button. New items will be created below the designated root.
6. Make a **Forwarding Screen** selection. This is the screen that will be shown once an object is created. (Using the example setup portrayed in the screenshots, when you click on a CD\_Contact object in the Web UI Tree, you are taken to the CD\_SimpleMatching screen. So, if you are creating a new CD\_Contact object using the Initiate Screen, after saving the object, you want to go to the CD\_SimpleMathing screen to view that object.)
7. For **Child Components > Main**, choose **Columns Control** from the dropdown. Then click on **go to component** and select **Node Editor** in the **Child Components > Columns** of the **Columns Control Properties**.
8. Within the **Node Editor Properties**, the search attributes need to be configured within the **Child Components > Rows** value field using the Add, Remove, Up and Down buttons. These search attributes are for searching direct objects.



9. Add the **Store Single Reference Target** component if end users will be searching on referenced objects in addition to direct objects (see example above).
10. Double-click on **Store Single Reference Target** to configure the component. **Object Type**, **Parent**, **Reference Type**, and **Child Component > Rows** are required parameters / components. Go through each parameter one-by-one to complete the configuration.

Properties (edited)

Configuration Web UI style

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

### Store Single Referenced Target Properties [go to parent](#)

**Component Description** This component is intended used for find similar search on Initiate Item. The component can be used to create a single reference target with attributes and create a reference to it from selection

**Object Type\*** CD\_Contact ...

**Parent\*** step://entity?id=ContactsRoot ...

**Reference Type\*** ContactToContact ...

Hide Section If Empty

Section Default Open

Section Title Contact Search

---

### Child Components

**Rows\*** Attribute Value Component (Contact Name) ▲  
Attribute Value Component (Phone Number) ▼

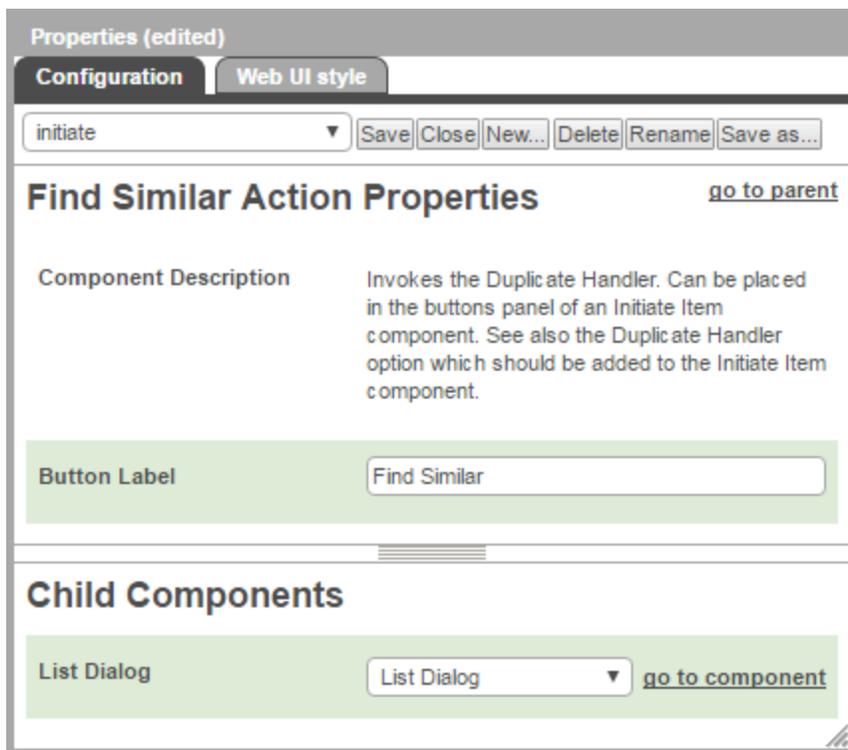
Add.. Remove Up Down

11. Back on the **Initiate Item Properties** screen, go to **Child Component > Buttons** and click on 'go to component.' In the **Actions** value field, click **Add** and select **Find Similar Action**.

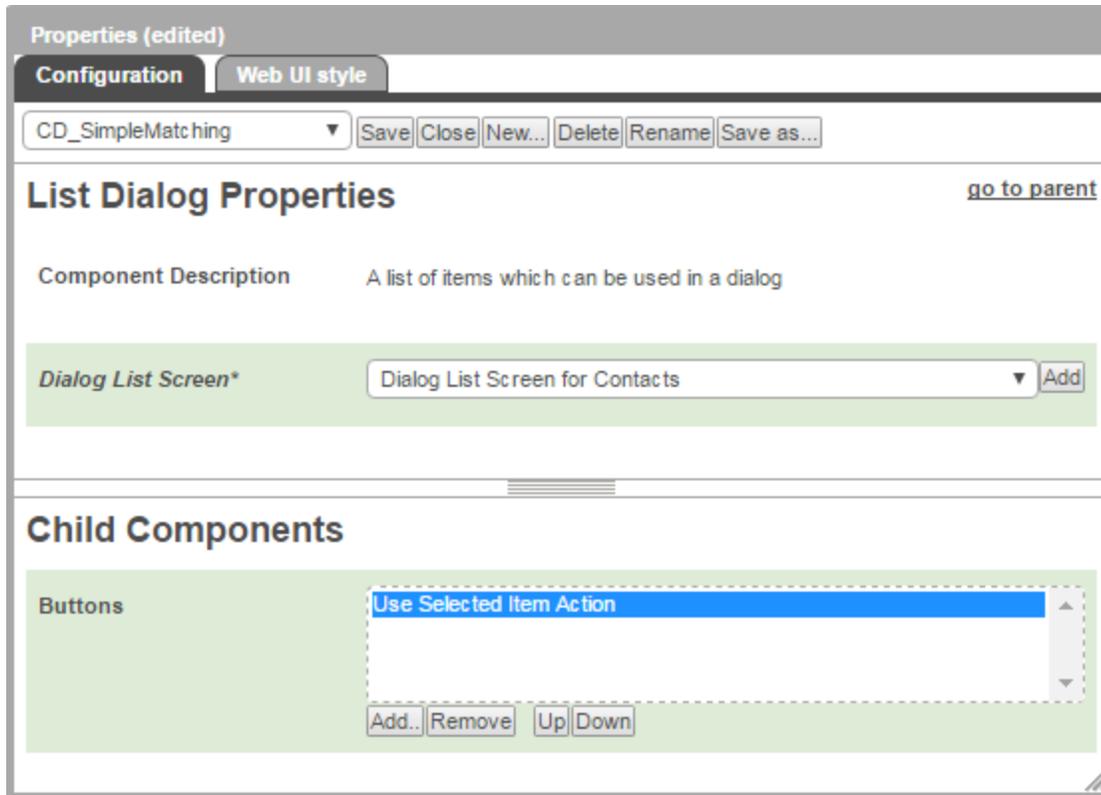
### Child Components

Main	Columns Control ▼	<a href="#">go to component</a>
Buttons	Buttons ▼	<a href="#">go to component</a>
Breadcrumb	<Select a child compo ▼	<a href="#">go to component</a>

- Double-click on the **Find Similar Action** title and open the **Find Similar Action Properties**.



- Edit the **Button Label**, if desired. Under **Child Components > Find Similar List Dialog**, select **List Dialog** from the dropdown menu.
- On **List Dialog Properties**, click **Add** to the right of the Dialog List Screen value field.
- Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
- If a **Dialog List Screen** already exists, skip the previous two steps and on the **List Dialog Properties**, simply select the **Dialog List Screen** using the dropdown.



17. Also on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.
18. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
19. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Find Similar Search tab for the results list. The **Help Text** is editable and will display at the top of the template results list.
20. Click **Save** and **Close** design mode to return to normal Web UI mode.

## Using Find Similar on an Initiate Item Screen

Here is a very basic example of how **Find Similar** is used on an **Initiate Item** screen.

The end user begins the object (Contact) initiation process by clicking Initiate Contact on the Status Selector Homepage Widget. On the Initiate Screen, the user enters data into the direct object search fields and also into the referenced object search fields and then clicks the Find Similar button.



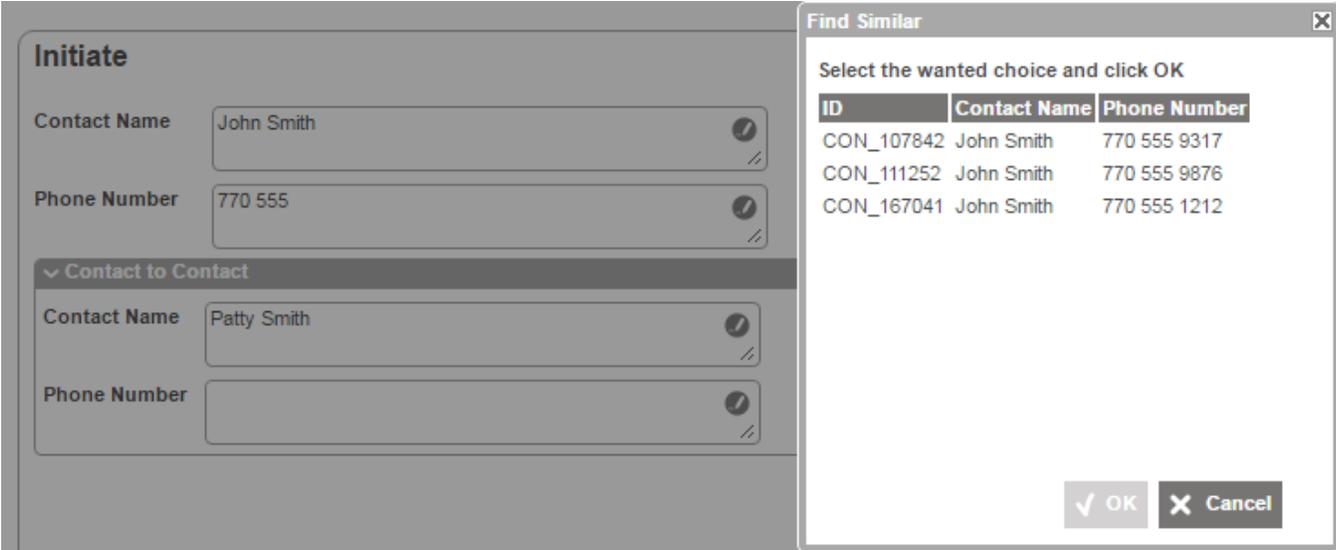
The screenshot shows the 'Initiate' form with the following fields and buttons:

- Contact Name: John Smith
- Phone Number: 770 555
- Contact to Contact section:
  - Contact Name: Patty Smith
  - Phone Number: (empty)
- Buttons: Save (highlighted with a red box), Find Similar

The algorithm runs in the background and the configured Dialog List Screen displays. Remember that this is not a standard search and results are based on the matching algorithm running in the background.

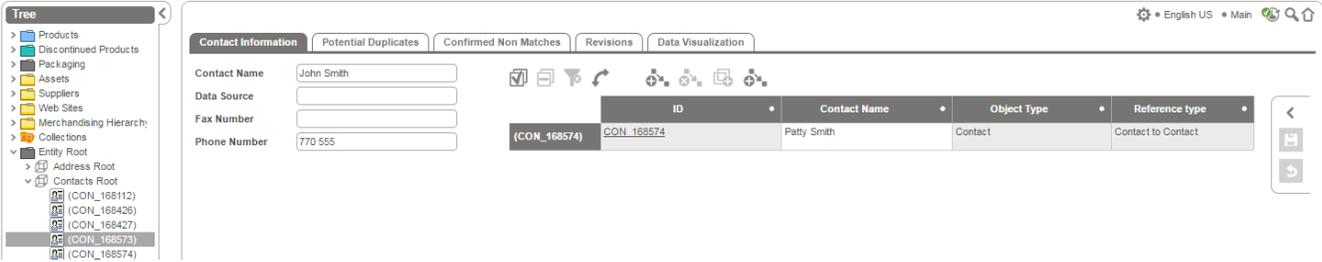
**Important:** As stated at the beginning of this topic, the key to Find Similar functionality is the matching setup that the customer creates and uses for duplicate handling. This is important because the attributes being searched *must* be part of the list of attributes that Match Codes are generated for. If not, the search will not work as expected.

Please note that even though you are searching on referenced objects, the system does not by default show values from referenced objects in the dialog / results list. You can configure calculated attributes to show data from the referenced data on the direct objects. For more information about calculated attributes, see the **Calculated Attributes in Web UI** section of the **Web User Interfaces / Using a Web UI** documentation.



A maximum of fifty (50) objects are shown at one time on the results list. The user can select one of the objects shown in the results list. Once a selection is made, the OK button is engaged. Clicking OK takes the user directly to that object via the appropriate Web UI screens. If the user wants to create a new object with the search data entered, the user clicks Cancel to exit the results list. Back on the Initiate Screen, the user will click Save and be taken directly to the new object. The data entered into the attribute value fields (configured in the Store Single Reference Target Properties) is also used to create the referenced object and the reference between these objects is also created.

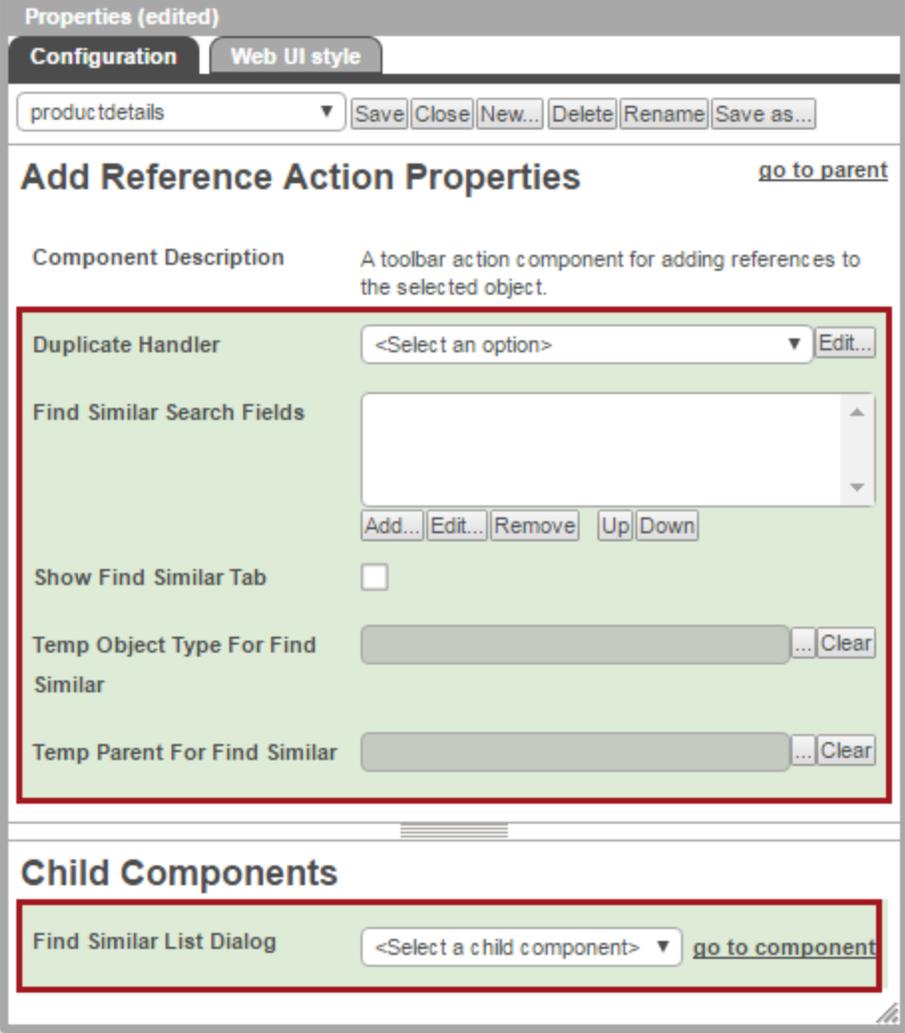




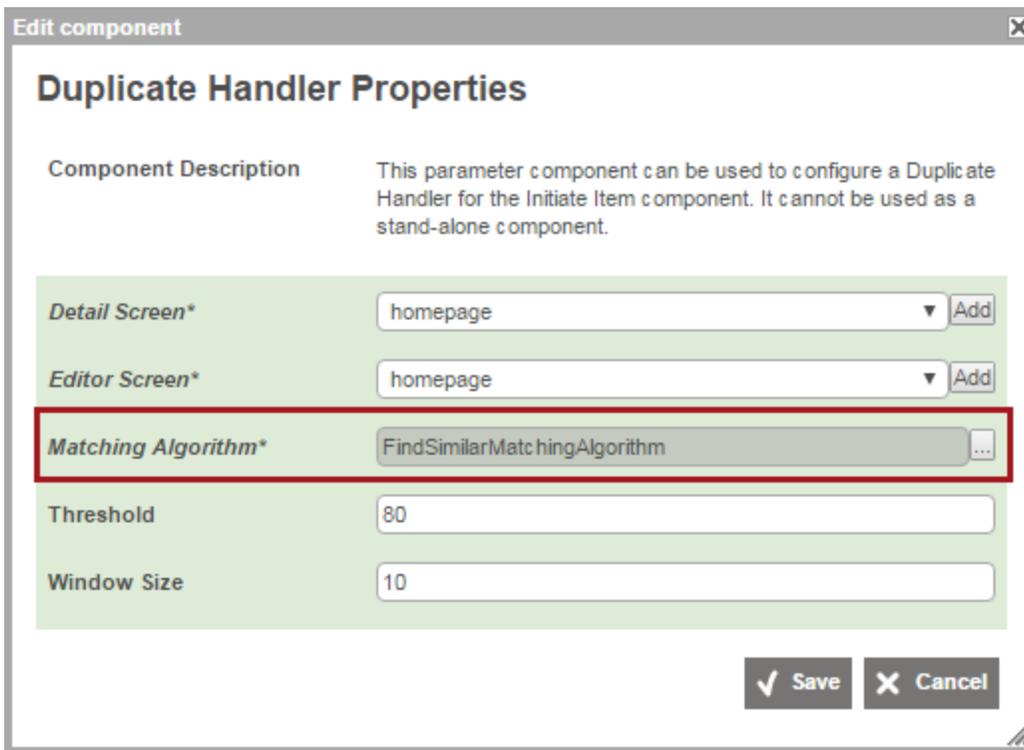
If applicable, the new object will automatically be initiated into a workflow or workflows based on existing workflow rules. For more information about workflows and auto-initiation, see the **Auto-Initiation of Tasks in Workflows** topic in the **Workflows** documentation. It is advisable to also make use of standard STEP tools like business rules and workflows to manage the referenced objects that are created in this manner.

### Configuring Find Similar on an Add Reference Action

This setup information is also available in the **Add Reference Action** section of the **Web User Interfaces / Using a Web UI** documentation.



1. Edit the properties for an existing **Add Reference Action** configured for a **Multi-Reference Editor**, or add an Add Reference Action and complete the configuration.
2. In the **Add Reference Action Properties**, select **Duplicate Handler** in the dropdown for the **Duplicate Handler** parameter.
3. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis to the right of the value field and select a matching algorithm. Click **Save**.



**Edit component** [Close]

### Duplicate Handler Properties

**Component Description** This parameter component can be used to configure a Duplicate Handler for the Initiate Item component. It cannot be used as a stand-alone component.

**Detail Screen\*** homepage [Add]

**Editor Screen\*** homepage [Add]

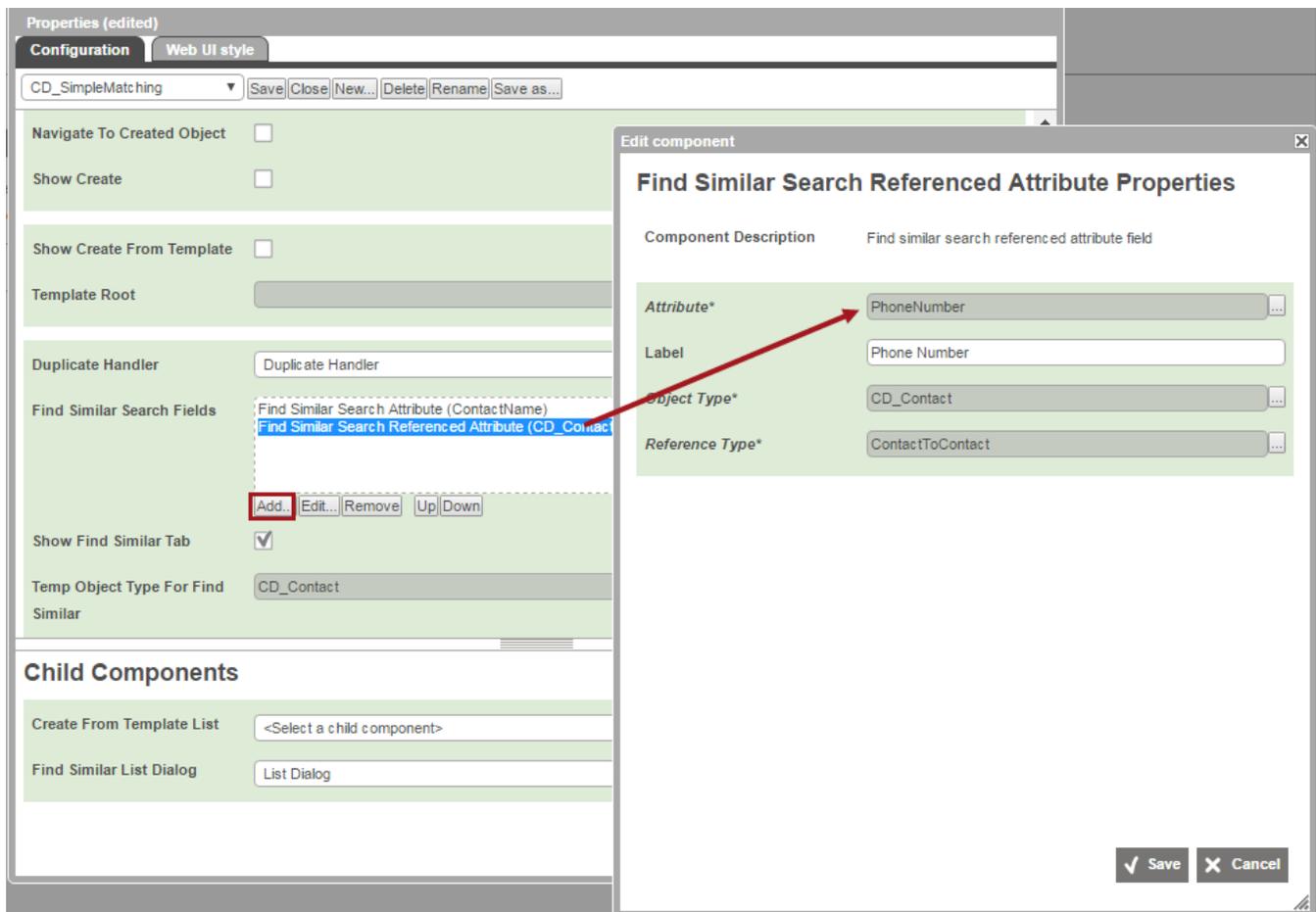
**Matching Algorithm\*** FindSimilarMatchingAlgorithm [...]

**Threshold** 80

**Window Size** 10

[Save] [Cancel]

4. Back on **Add Reference Action Properties**, click **Add** under the **Find Similar Search Fields** value box. Add, remove, and re-order **Attribute** and **Referenced Attributes** as desired. Remember that these search fields will need to be incorporated into the matching algorithm configured in the Duplicate Handler parameter.
5. It is important to fill in the **Label** fields during the **Find Similar Search Fields** configuration. These labels will appear on the Find Similar Search tab. If adding a **Find Similar Search Referenced Attribute**, fill in the **Attribute**, **Label**, **Object Type**, and **Reference Type** values. Save all changes.



6. Enable the **Show Find Similar Tab** setting back on the **Add Reference Action Properties**.
7. Using the ellipsis buttons, make a selection for the **Temp Object Type For Find Similar** parameter and the **Temp Parent For Find Similar** parameter. (When the matching algorithm is run, it creates temporary objects based on the input in the search fields. These objects are then used in the algorithm to compare and find similar objects. The temporary objects need a parent and object type to be created. After the user finishes the operation, the temporary objects are deleted by the system. These parameters have to be configured for the functionality to work. The object types of both the direct objects and the referenced objects need to be made valid under the location used for the Temp Parent For Find Similar parameter.)

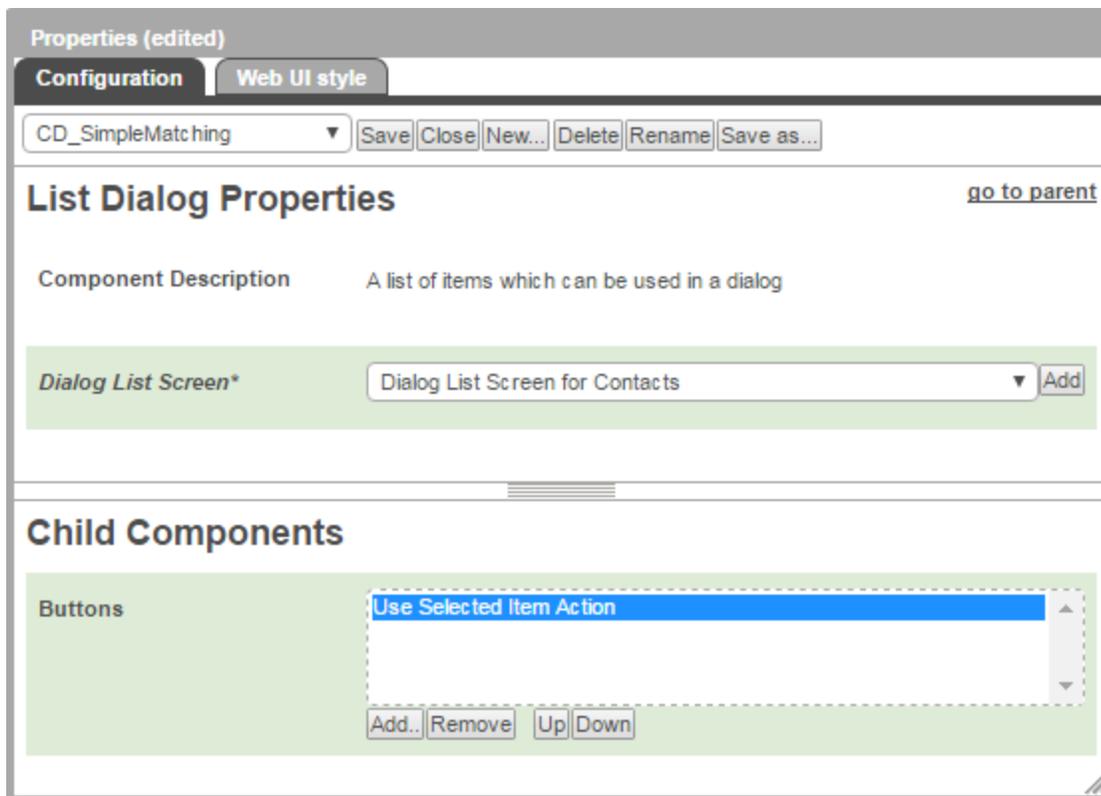
---

**Important:** The node selected for Temp Parent For Find Similar in the configuration, must also be included in the category specified in the match code definition, if a category is specified. If this is not done, the match codes will not generate properly and the match results will be incorrect.

---

8. Under **Child Components > Find Similar List Dialog**, select **List Dialog** from the dropdown menu.
9. On **List Dialog Properties**, click **Add** to the right of the Dialog List Screen value field.
10. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.

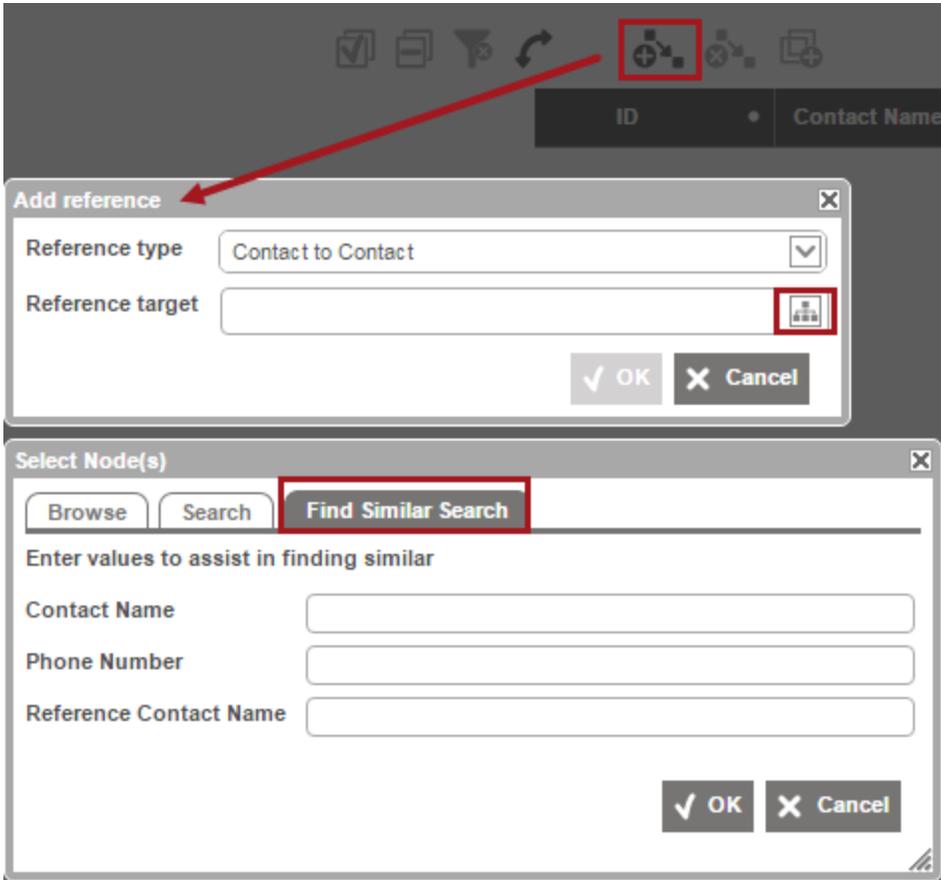
11. If a **Dialog List Screen** already exists, skip the previous two steps and on the **List Dialog Properties**, simply select the **Dialog List Screen** using the dropdown.
12. Also on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.

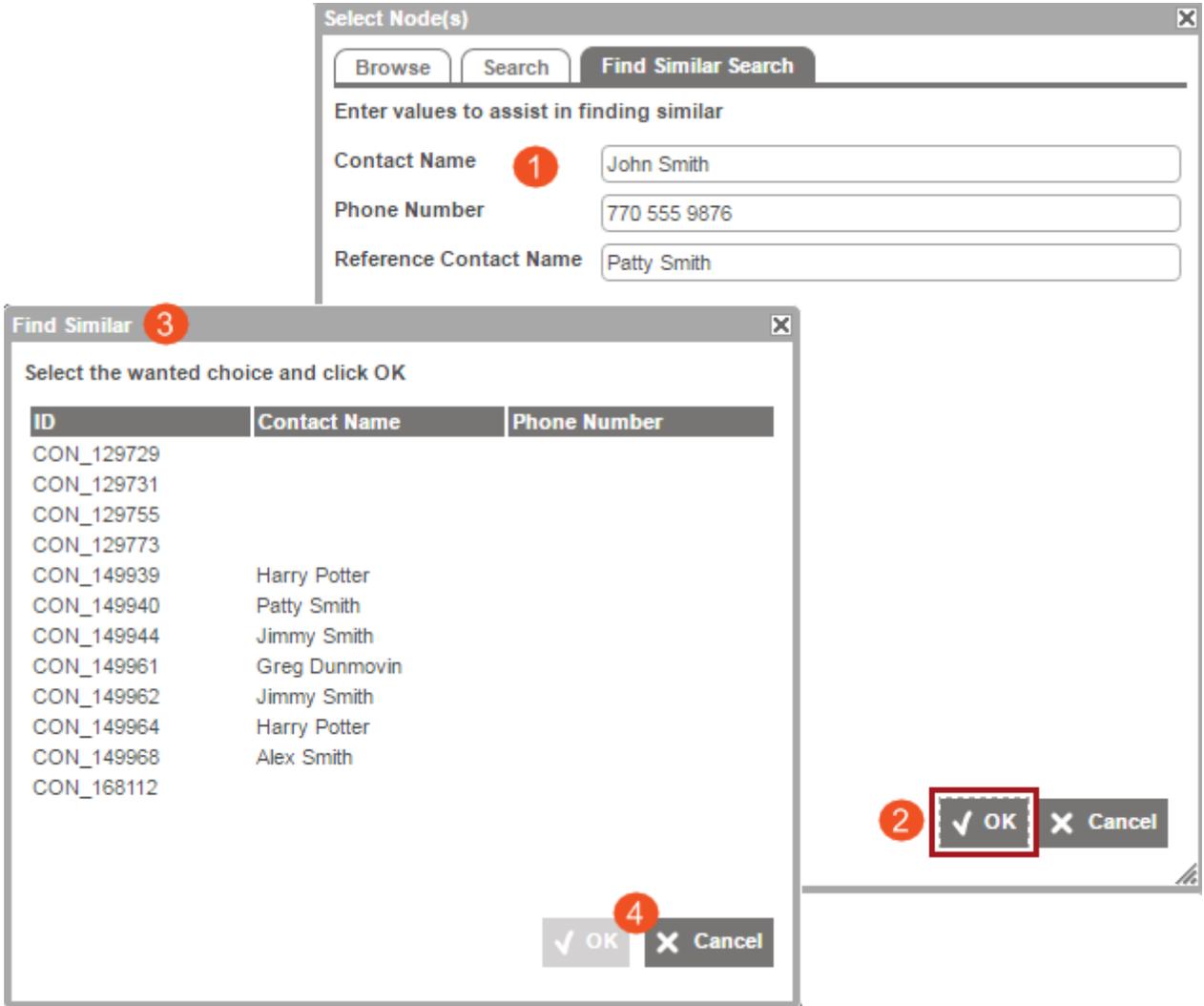


13. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
14. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Find Similar Search tab for the results list. The **Help Text** is editable and will display at the top of the template results list. *Please note that reference data cannot be displayed in the Dialog List.*
15. Click **Save** and **Close** design mode to return to normal Web UI mode.

## Using Find Similar on an Add Reference Action

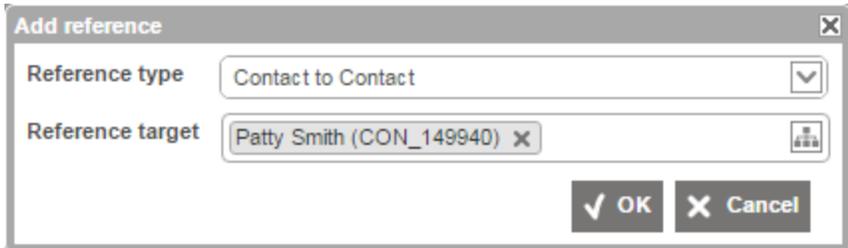
Here is an example of a configured **Find Similar Search** tab. While using a **Multi-Reference Editor** component, the end user clicked 'Add reference' and then clicked the node picker icon on the 'Add reference' dialog that appeared. The **Find Similar Search** tab is displayed in the 'Select Node(s)' dialog. The end user enters data into the configured attribute fields and clicks OK. The algorithm runs in the background and the configured Dialog List Screen displays. Remember that this is not a standard search and results are based on the matching algorithm running in the background.





**Important:** As stated previously in this topic, the key to Find Similar functionality is the matching setup that the customer creates and uses for duplicate handling. This is important because the attributes being searched *must* be part of the list of attributes that Match Codes are generated for. If not, the search will not work as expected.

A maximum of fifty (50) objects are shown at one time on the results list. If the end user finds a reference on the results list that they want to use, they click in the row they want. When that selection is made, the OK button will be available. The end users clicks OK and now that reference is saved. If the user does not find a result to use, they can click cancel and create a new reference using the Create or Create from Template functions (both described previously in this topic).



**Success**  
1 reference was created!

English US Main

Revisions

Data Visualization



	ID	Contact Name	Object Type	Reference type
Patty Smith	<a href="#">CON_149940</a>	Patty Smith	Contact	Contact to Contact

## Follow Single Reference

This component in Web UI allows for editing of an object and a referenced object in a simplified interface. It enables users to view and edit data on referenced objects without navigating away from the source object. This is especially useful when a simple interface is desired for the end user who does not need awareness that the underlying data model utilizes independent objects.

### Preconditions and Considerations

The Follow Single Reference component is intended to display data where the source of the reference has only one reference of that type.

If the *source* object has more than one reference of a given reference type, an error is displayed within that section and users cannot view or edit data on any of the referenced objects using that reference type.

### Item Details

Basic Overview

Approved	✘ Last approved 10/27/15 9:34 AM
Name	<input type="text" value="1112121-1"/>
Object Type	SalesItem

▼ Multi Supplier

! Multiple references found. This view only support showing one referenced target.

▼ Replacement Item

However, the *target* object may be referenced by more than one source, in which case a warning is displayed to the user to help prevent unintended data changes.

### Item Details

Basic Overview

Approved ✖ Last approved 10/9/15 12:57 PM

Name

Object Type SalesItem

▼ Multi Supplier

⚠ This target is shared by other objects.

Material	<input style="width: 90%;" type="text" value="Cotton"/>
Color	<input style="width: 90%;" type="text" value="Black"/> ▼
Hat Size	<input style="width: 90%;" type="text" value="7"/>
Primary Color	<input style="width: 90%;" type="text"/>
T-shirt Size	<input style="width: 90%;" type="text"/> ▼
URL	<input style="width: 90%;" type="text" value="http://www.stibosystems.com"/> →
	<input style="width: 90%;" type="text"/> →
wwwfx	<input style="width: 90%;" type="text" value="http://www.stibosystems.com"/> 🔍

Before configuring the Follow Single Reference component, it is recommended that the data model be verified to ensure that the component is being used to display references for which the source object has only one reference of that type.

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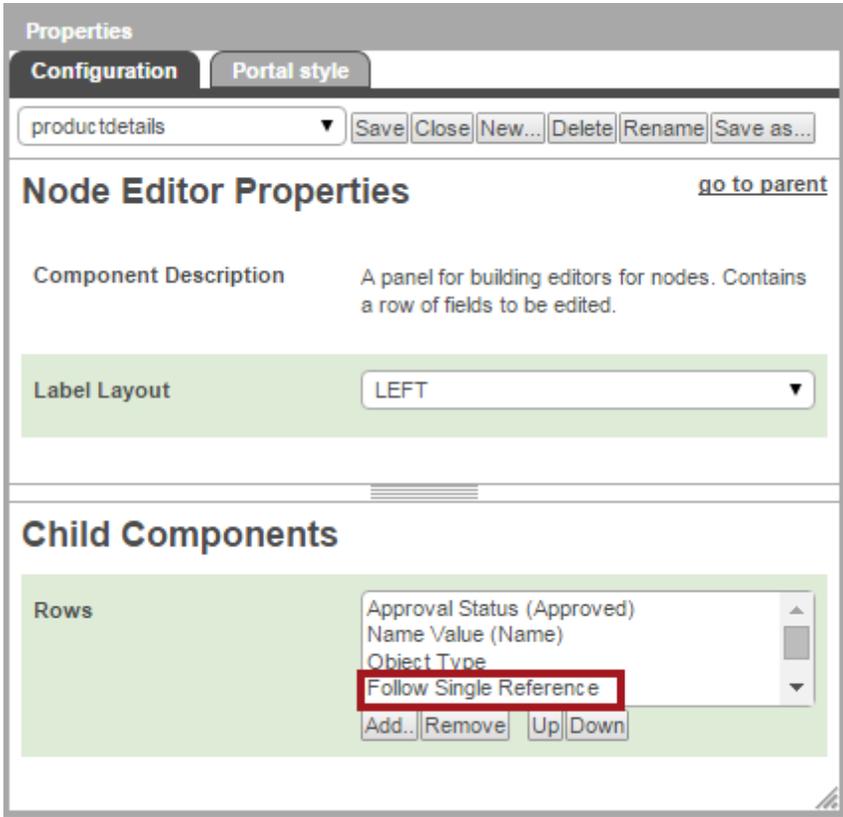
**Note:** When using the Follow Single Reference component in conjunction with Approve actions, it is necessary to approve the target object(s) prior to approving the source object. It is therefore recommended that the Run Business Action component be used in place of the Approve Action so that a business rule handles approval of the target object(s) (in addition to approval of the source object).

---

## Follow Single Reference Configuration

The Follow Single Reference component can be added any number of times to any Node Editor based screen. This allows users to interact with a source object and any number of referenced objects in a single screen. Users can easily adjust or isolate focus by collapsing or expanding reference types as needed.

From any screen with a **Node Editor**, add the **Follow Single Reference** component.



Double-click on the Follow Single Reference row to configure it. A reference type and at least one data point on the target object must be configured. Additional configuration options are available to determine the default display.

## Follow Single Reference Properties

[go to parent](#)

**Component Description**      A component that can be used to follow a 1:1 reference to display information from a referenced node

**Reference Type\***       ...

**Hide Section If Empty**     

**Section Default Open**     

**Section Title**     

## Child Components

**Rows\***       ▲ ▼

## Homepage Widgets

It is possible to configure a grid of widgets that display useful information on the Web UI homepage, where users are directed after logging in. The purpose of the widget grid is to display a customizable overview of common tasks or information a user needs to more easily work in STEP. The widgets are meant as a quick way of getting an overview of a user's tasks and an easy way to reach actions that are often used.

Below is a list of some of the most commonly used widgets, and adding widgets to a homepage.

### HTML Asset Widget

The HTML asset widget is a versatile component that will load an asset from STEP assuming that it contains an HTML document and insert it within the widget. This can be used to display a rich message that can be updated by replacing the asset content from the STEP Workbench.

### KPI Widget

The KPI widget can be configured with a range of different data profiling content. The dashboard widgets available in the Web UI can all be configured as content in the KPI widget.

For more information on what data profile widgets are available, see the **Data Profile Widgets in Web UI** section of the **Web User Interfaces / Using a Web UI** documentation.

### Links Widget

The links widget can be configured with a list of links to Web UI screens (e.g., upload screen or processes screen), a node in STEP (product, asset, classification, entity, or publication) or to an external URL outside the Web UI. In addition, small sections of text can be placed in the list by adding a StaticText or StaticHtml component. The text components can be used to write descriptive text for the links.

### Mass Creation Widget

Once configured, the Mass Creation Widget enables users to start the process of creating new objects in Web UI. This widget is used in conjunction with the Mass Creation screen type, which allows users to onboard multiple objects into STEP using Web UI screens instead of more complex import methods such as Smartsheets.

For more information, see the **Mass Creation Widget** section of the **Web User Interfaces / Using a Web UI** documentation [here](#).

### Search Widget

The search widget gives quick access to search the STEP system and navigate to a node (e.g., a product) in the system. The result of a search can either be a screen of type generic Search or of type Node List Browser. The generic search screen can be configured with one or more display modes to show the results, and the Node List Browser screen will show a detail screen with the first result and the option of paging through the result list.

## Simple Importer Widget

The Simple Importer Widget allows users to easily update or create products, entities, and classifications using CSV or Excel formats. If desired, the widget can also provide more advanced import functionality when setup to utilize saved import configurations.

## Smartsheet Export Widget

The Smartsheet Export Widget allows users to easily download smartsheets. Depending on how the chosen template is configured, this can be used for both data and template exports.

For more information, see the **Configuring Smartsheets in the Supplier Portal** section of the **Excel Smartsheets** documentation.

## Status Selector Homepage Widget

The Status Selector Homepage Widget allows a user to view tasks associated with the states of a particular workflow. If desired, the widget can also be configured to allow users to initiate objects into a workflow. Similar functionality is available on the Status Selector Sidebar Widget in Main.

For more information, see the **Status Selector Homepage Widget** section of the **Workflows in Web UI** documentation.

## Text Widget

The Text Widget allows for the display of text on the Web UI homepage. Since all users are directed to the homepage after login, the Text Widget is a great way to display a custom welcome message and/or instructions to users regarding next steps after logging in.

For more information, see the **Text Widget** documentation.

## User Widget

The user widget shows the username of the currently logged in user, and has a logout button to let the user log safely out of the Web UI.

## Adding Widgets to a Homepage

Any number of widgets can be added to a Widget Grid. Typically Web UI designers will choose to add all widgets to a single Widget Grid component, but they can also add multiple Widget Grids to a homepage.

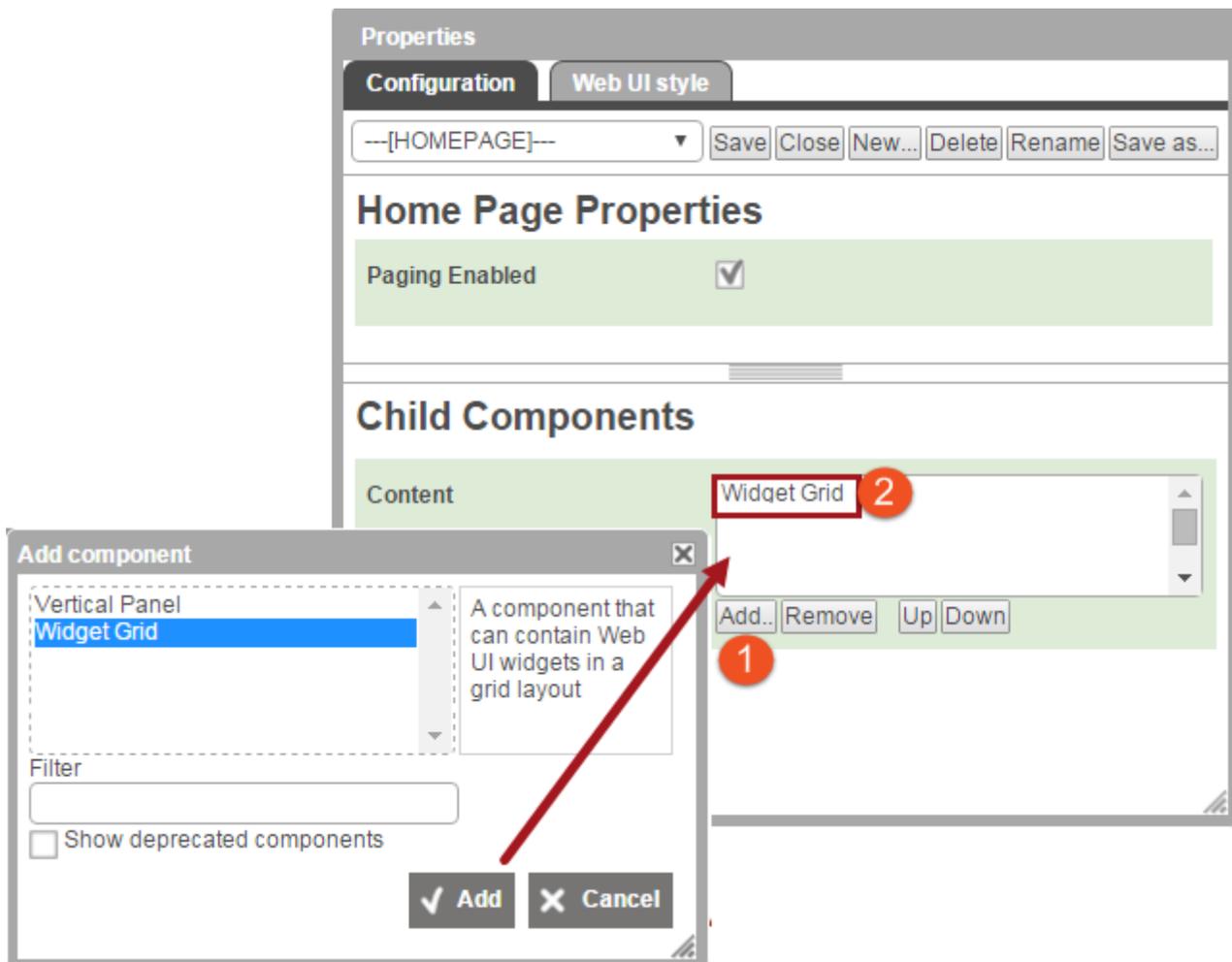
### Prerequisites

To configure homepage widgets, users must have appropriate privileges to access the Web UI designer, and are expected to be familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section.

### Configuring Homepage Widgets

Below are steps for adding widgets to a Homepage using the Web UI designer.

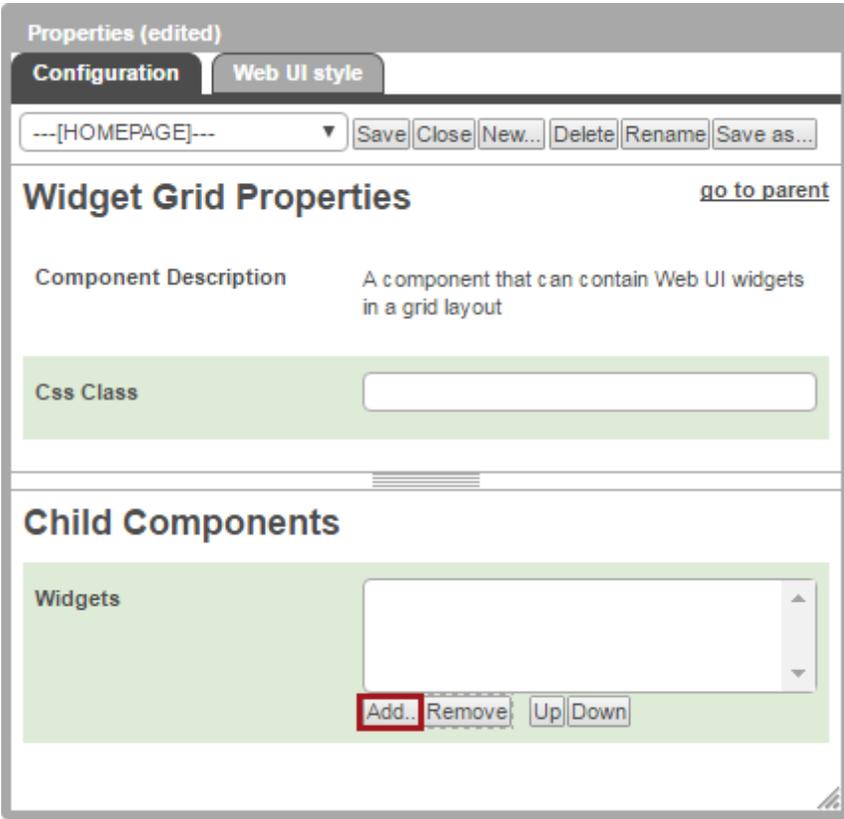
On the Home Page Properties, add a **Widget Grid** as a **Child Component** to **Content**.



If more than one Widget Grid or Vertical Panel is listed, and a new Widget Grid is added, the new Widget Grid will appear at the bottom of the list.

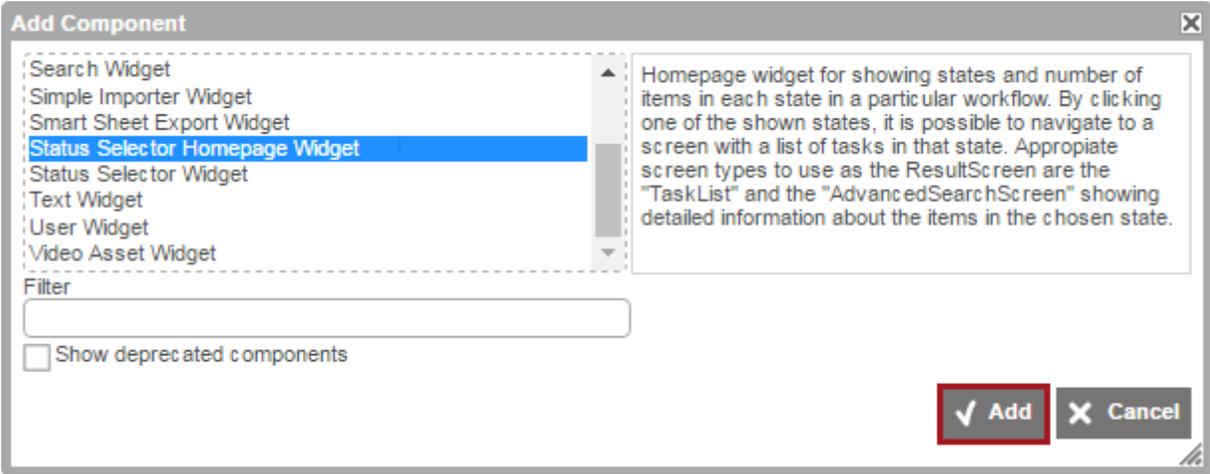
Double-click on newly added **Widget Grid** to display its properties.

Select **Add** in the Widgets Child Component section to display the Add Component dialog.

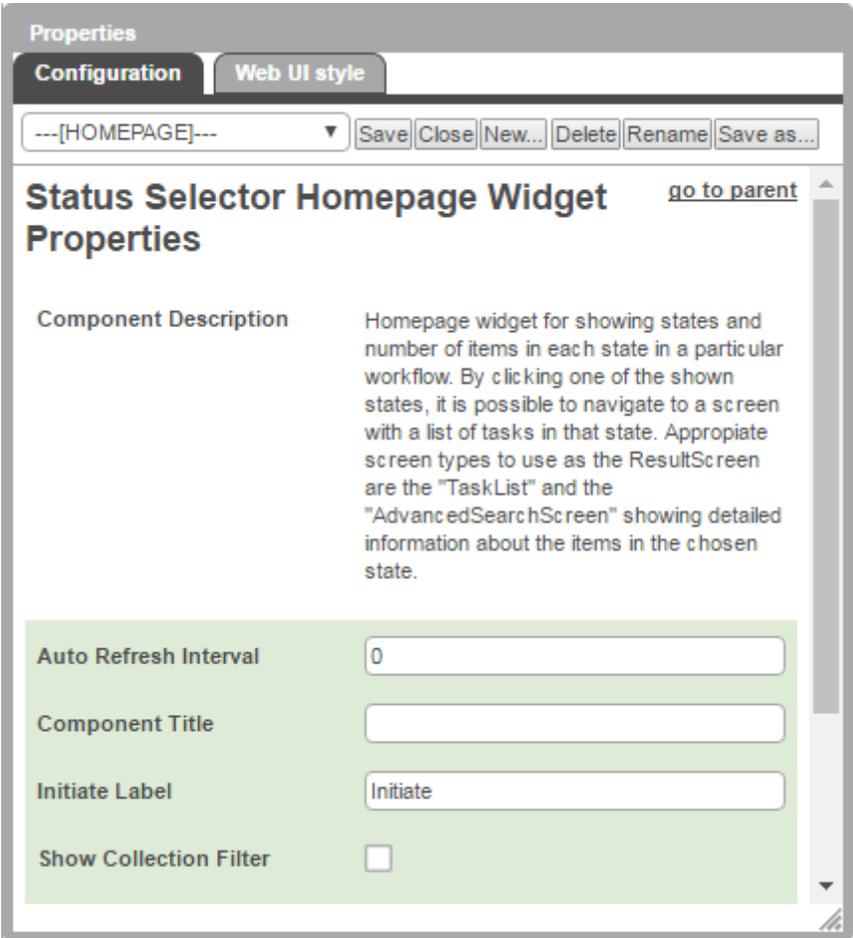


Select the necessary component, in this case **Status Selector Homepage Widget** is being used.

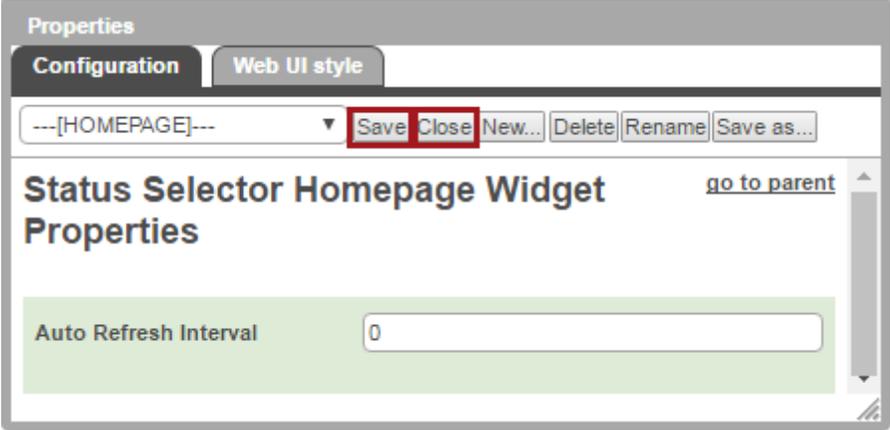
Select **Add** to close the dialog and return to the Widget Properties.



Each widget has a set of properties that must be configured. See the documentation specific to each widget for additional information.



When the configuration is complete, select **Save** and **Close** the designer.



The widget should now appear on the Homepage.

## Data Profile Widgets in Web UI

Like data profile dashboards in STEP Workbench, profiled data can also be displayed using the KPI widgets in Web UI.

To add widgets to the homepage, add the widget 'KPI Widget' to an applicable page, specify a selection (what node to display profiled data from), and choose the desired child component. To add one to a node in the hierarchy simply add the desired widget as a child component.

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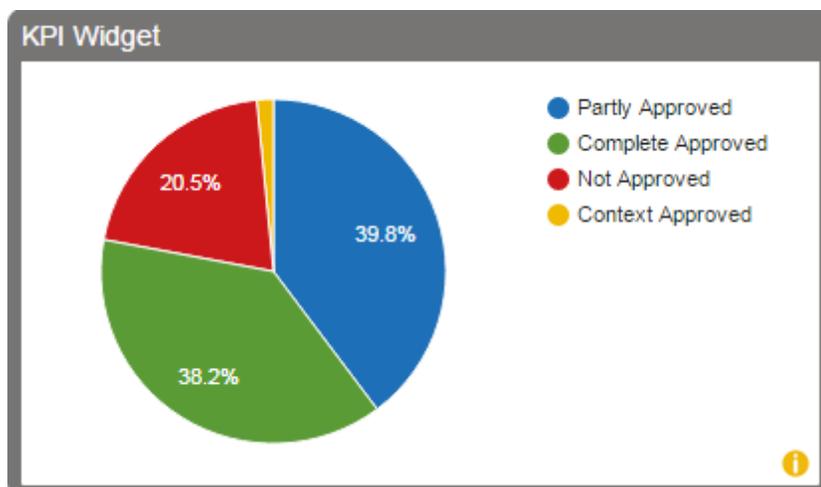
**Note:** Widgets added to a node in the hierarchy will pull profiled data from its child nodes automatically. When adding a widget to the homepage, however, the user must specify where to pull profiled data from via the Selection field. In either case data will only display so long as a profile has been generated for the applicable dataset.

---

All available data profile widgets found in Web UI are detailed below.

### Approve Status

This widget displays the approval status of objects in the data profile.

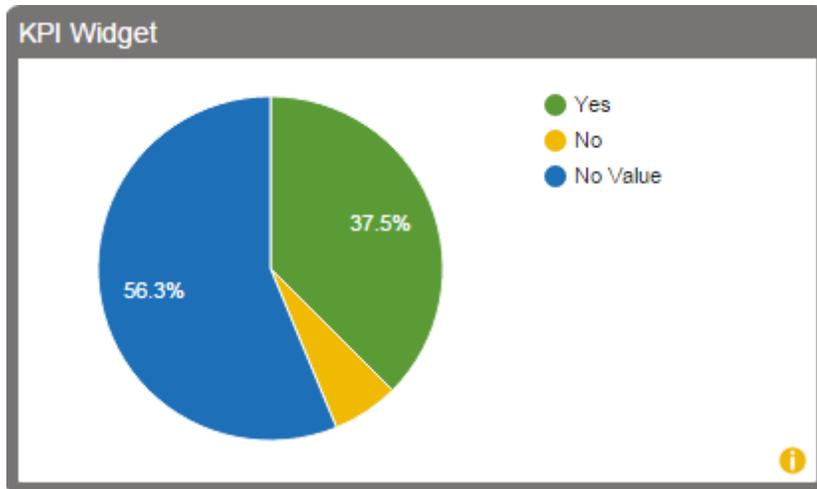


Configuration options include:

- **Context** - Pulls data from the specified context.
- **Object Type** - Filters data via object type.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

### Attribute Values

This widget shows the distribution of values for the specified attribute across objects in the data profile.



Configuration options include:

- **Attribute** - Specifies which attribute to pull values from. Defining this configuration is mandatory.
- **Context** - Pulls data from the specified context.
- **Dashboard Type** - Determines whether to display the data as a pie chart or bar chart.
- **Max Values** - Specifies the maximum number of distinct values to display. By default this field is set to - 1, which means 'all values'. If the specified maximum is exceeded, the remaining (smaller) values will be placed in the "Other values" group.
- **Object Type** - Filters data via object type.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Show No Values** - Displays the number of objects that have no value for the specified attribute when the box is checked.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

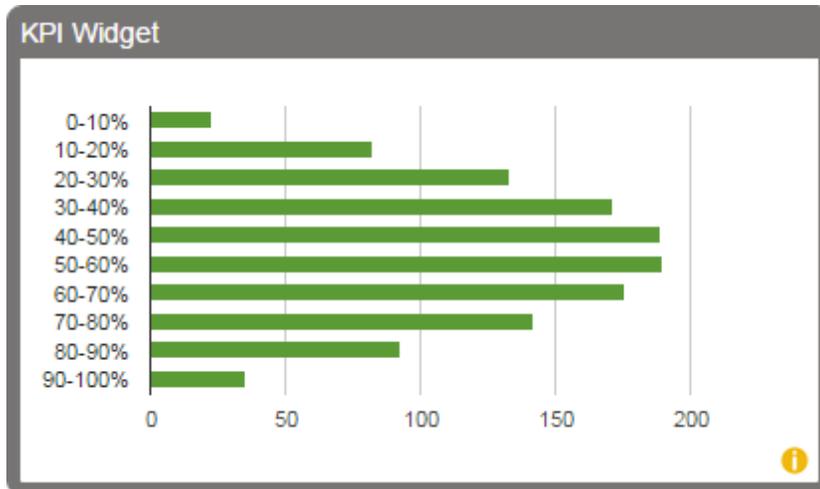
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**Important:** Any attribute that is full text indexed, multi-valued, calculated, or has values with inline references is not compatible with this widget.

---

## Average Object Completeness

This widget shows the average object completeness in the data profile.



Configuration options include:

- **Completeness Metric** - Determines which completeness metric to evaluate the data with. Note that the completeness metric must be specified in the Profile Configuration and data must have been profiled using that configuration before the widget can show any data. For more information, see the **Profile Configuration** section of the **Data Profiling** documentation.
- **Context** - Pulls data from the specified context.
- **Intervals** - Displays the bars of the graph in intervals of 2, 4, 5, 10, or 20.
- **Object Type** - Filters data via object type.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

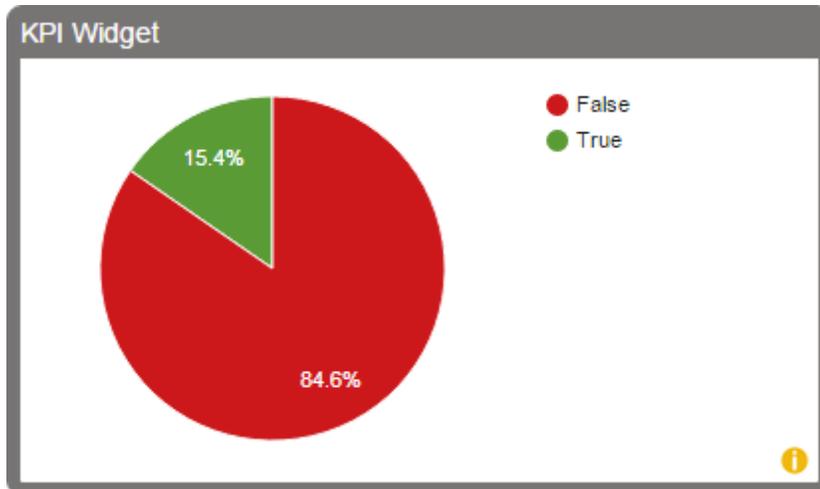
## Condition Status

This widget displays the result of testing a business condition during profiling.

---

**Note:** If the test of the business condition results in an error, the test is reported as failed.

---



Configuration options include:

- **Condition** - Determines which business condition to test when profiling. Note that the condition must be specified in the Profile Configuration and data must have been profiled using that configuration before the widget can show any data. For more information, see the **Profile Configuration** section of the **Data Profiling** documentation.
- **Context** - Pulls data from the specified context.
- **Object Type** - Filters data via object type.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

## Least Complete Attributes

This widget displays the five least complete attributes in the data profile. Completeness is rounded to the nearest whole percentage and attributes with the same completeness are presented in the order in which they are retrieved from the database. Inherited values are included in the calculation.

KPI Widget

Attribute	Completeness
date	0%
Width (range)	0%
Exclusive?	0%
Attribute C	0%
Seasonal	0%

*(Note: A yellow information icon is visible in the bottom right corner of the widget.)*

Configuration options include:

- **Context** - Pulls data from the specified context.
- **Object Type** - Filters data via object type.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

### Most Complete Attributes

This widget lists the five most complete attributes in the data profile. Completeness is rounded to the nearest whole percentage and attributes with the same completeness are presented in the order in which they are retrieved from the database. Inherited values are included in the calculation.

KPI Widget

Attribute	Completeness
WWW	100%
Product Dimensions_calculated	100%
International Distribution Number	65%
Domestic Distribution Number	65%
Family-Level Key Attribute	33%

*(Note: A yellow information icon is visible in the bottom right corner of the widget.)*

Configuration options include:

- **Context** - Pulls data from the specified context.
- **Object Type** - Filters data via object type.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

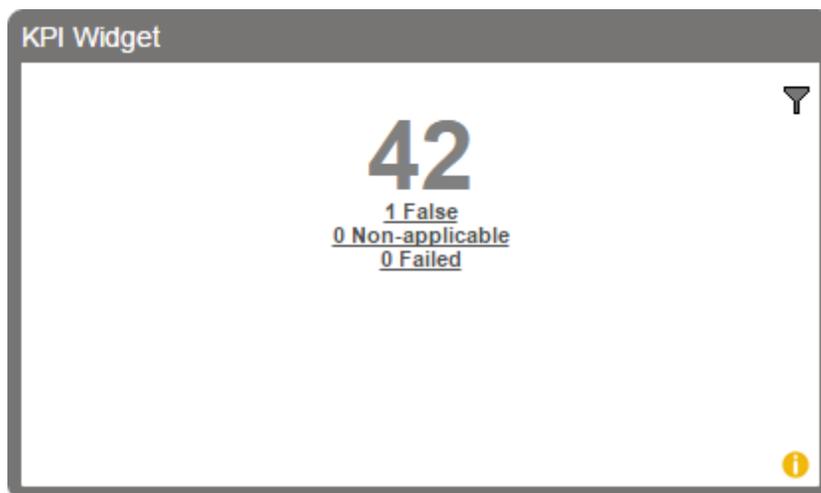
## Object Count

This widget displays the number of objects in the data profile.

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**Note:** If any objects being profiled are linked multiple times in the sub-tree, they are also counted multiple times. This only applies to sub-trees under classifications and entities, as products can only link to other products once in a parent / child relationship.

---



Configuration options include:

- **Context** - Pulls data from the specified context.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

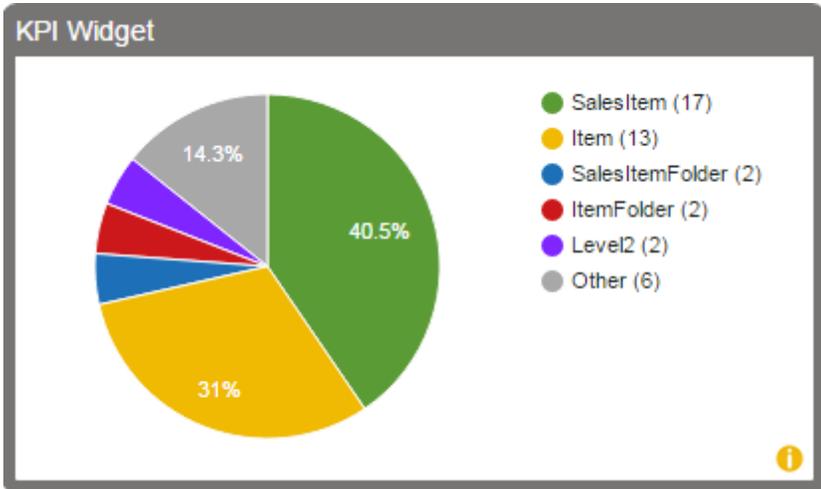
## Object Type Count

This widget displays the distribution of object types in the data profile.

---

**Note:** Only the five most common types are displayed as separate entries. The remaining types are grouped in "Other object types".

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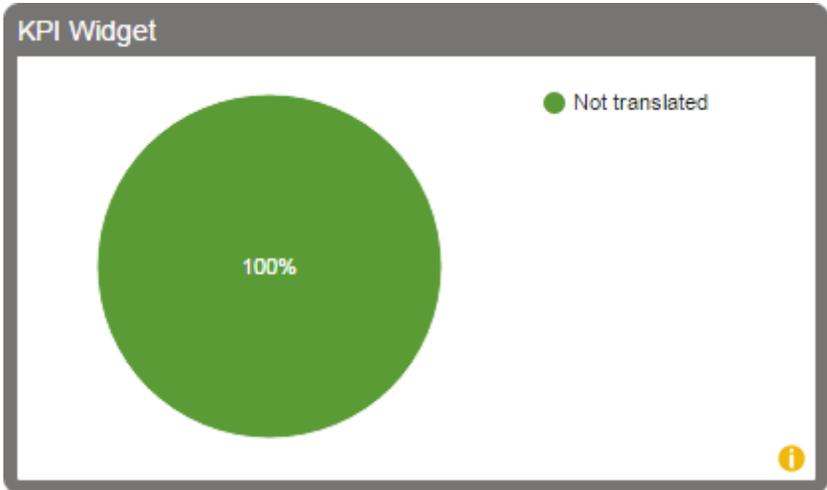


Configuration options include:

- **Context** - Pulls data from the specified context.
- **Dashboard Type** - Determines whether to display the data as a pie chart or bar chart.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

### Translation Status

This widget displays the translation status of the objects in the data profile.



Configuration options include:

- **Context** - Pulls data from the specified context.
- **Object Type** - Filters data via object type.
- **Screen** - Links the graph to another screen in the Web UI. The selected screen must be a Generic Search screen.
- **Title** - Changes the name that appears on the widget's title bar.
- **Workspace** - Pulls data from the specified workspace.

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**Note:** The KPI Table Widget has been deprecated.

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## Mass Creation Widget

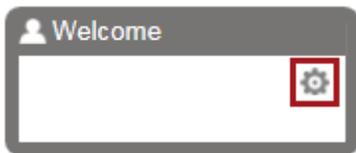
The Mass Creation Widget is a Homepage widget that, once configured, enables users to start the process of creating new objects in Web UI. This widget is used in conjunction with the Mass Creation screen type, which allows users to onboard multiple objects into STEP using Web UI screens instead of using more complex import methods such as Smartsheets.

### Adding a Mass Creation Widget Grid

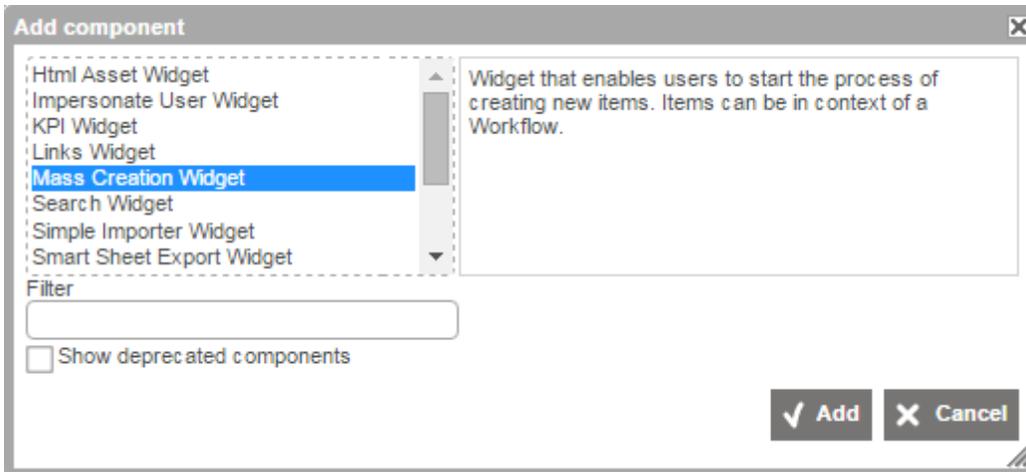
Admin users first need to add the Mass Creation Widget . Once the widget is created, configuration can begin.

To add a Mass Creation Widget to the Web UI Homepage:

1. Log in to the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the Homepage (in the user widget).



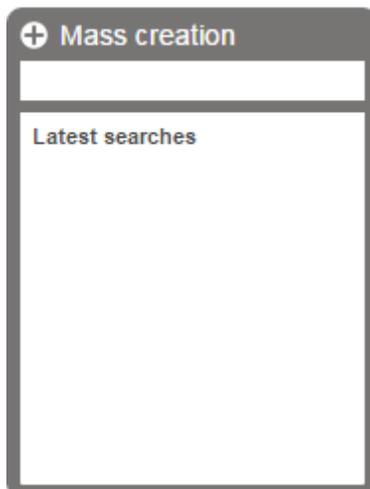
3. If not automatically shown the Home Page Properties, choose **---[HOMEPAGE]---** from the screen dropdown list.
4. Add the Mass Creation Widget to a Widget Grid:
  - If adding it to an existing Widget Grid, double-click the desired Widget Grid listed in the Child Components > Content parameter field. Click Add, choose **Mass Creation Widget** from the 'Add component' dialog, and then click Add again.
  - If adding a new Widget Grid, click the Add button under the Child Components > Content parameter field. Select **Widget Grid** in the 'Add component' dialog and then click Add. Next, double-click the new Widget Grid that is now showing at the bottom of the list in the Child Components > Content field. Click Add, choose **Mass Creation Widget** from the 'Add component' dialog, and then click Add again.



Widgets can be reordered as needed. Either reorder the individual widgets inside a Widget Grid by clicking on a widget name and then clicking the Up and Down buttons in the **Widgets Child Component** of the **Widget Grid Properties** screen. Or, as an alternative, select a **Widget Grid** in the Child Components > Content field of the Home Page Properties and click Up and Down to reorder the entire Widget Grid. For more information about widgets, see the **Adding Widgets to the Homepage** section of the **Homepage Widgets / Using a Web UI** documentation for more information.

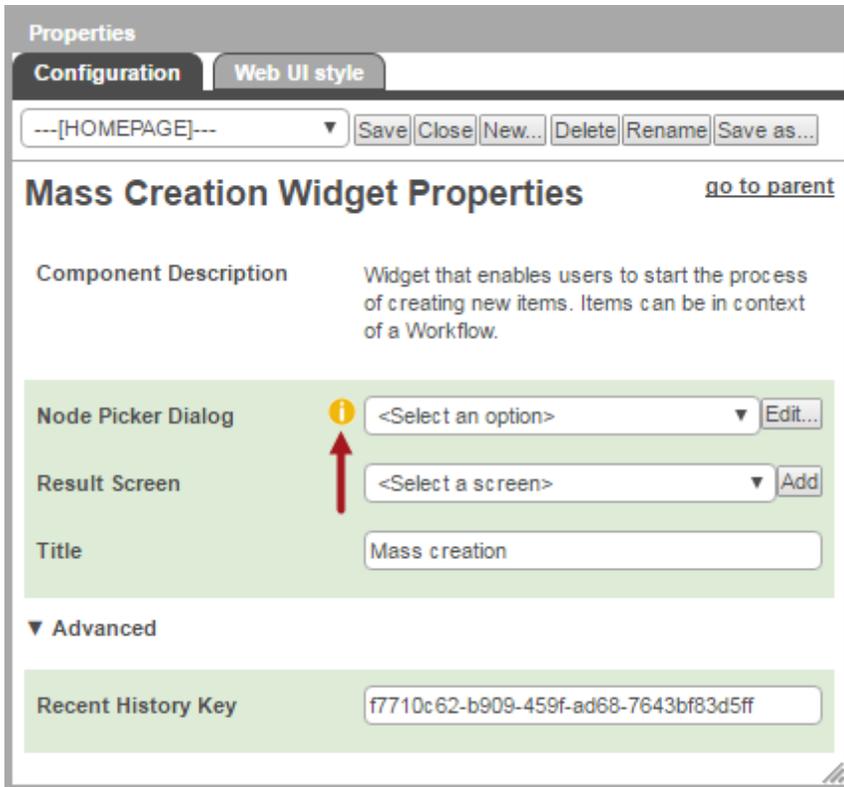
5. Click **Save** in the Designer window. At this point, either close Designer and configure the widget at a later time, or continue on with the **Mass Creation Widget Properties** configuration.

Until the widget is configured, it will sit on the Web UI Homepage and remain non-functional for onboarding purposes.



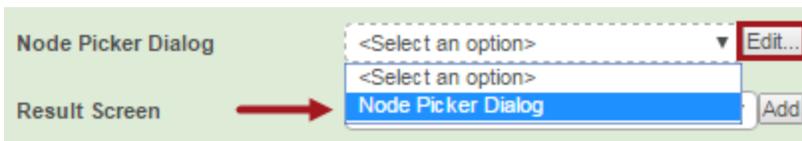
## Configuring a Mass Creation Widget

An image of the default properties screen follows. Each parameter should be configured as needed and features help text, accessible by clicking the yellow info icon to the right of each parameter name. The sections directly after the image explain what each parameter does and the steps / options for configuring them.

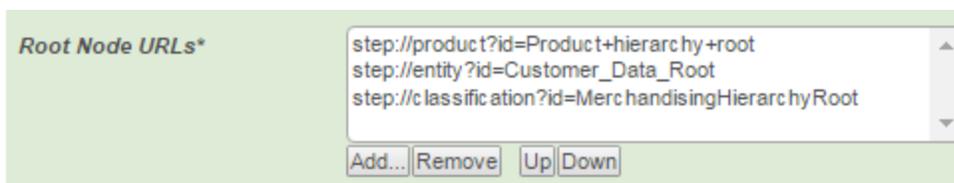


## Node Picker Dialog

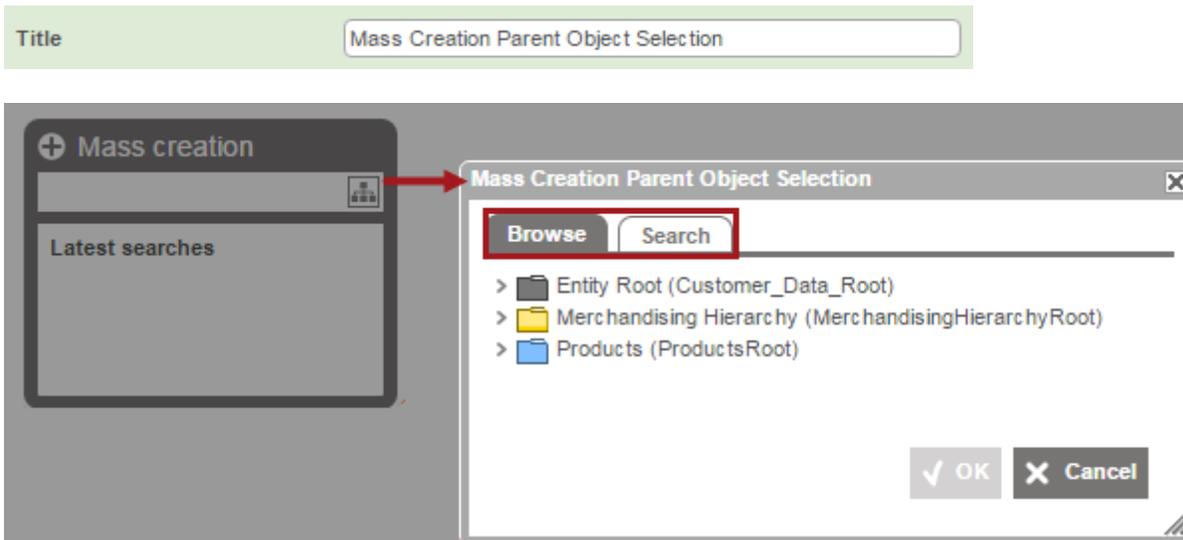
1. Select 'Node Picker Dialog' from the dropdown. The **Node Picker Dialog Properties** dialog automatically displays.



2. On the properties screen, select **Static Root Nodes** within the **Root Node Plugin** dropdown.
3. The **Static Root Nodes Properties** dialog appears. Click **Add**, under the **Root Node URLs** field, to make selections. This selection will determine what nodes are presented to the end user when using the widget and should be limited to **Product**, **Entity**, or **Classification** nodes. Re-order and remove existing root node selections as needed.



- A selection must be made for the **Tab Pages** parameter. Two valid options work with the Mass Creation functionality: Browse and Search. After adding a Browse tab, double-click the Browse title in the parameter field to set, if needed, any Tree navigation limitations for end users. If adding a Search Table tab, there is additional configuration to be done to the Search Table Tab Properties to maximize the search feature.
- Leave **Title** as-is or type in a meaningful title for end users. This title will display above the tabs (created in the previous step) when users click the node picker icon on the widget.




---

**Note:** All the steps above cover setting up the parameters for the first time. Where applicable, click the Edit button to the right of the parameter value field (or beneath it) to edit existing settings.

---

- All the steps above cover setting up the parameters for the first time. Where applicable, click the Edit button to the right of the parameter value field (or beneath it) to edit existing settings.
- Click **Save** and you will be returned to the **Mass Creation Widget Properties**.

## Results Screen

- Using the '<Select a screen>' dropdown for the **Result Screen** parameter, choose the screen ID for the Mass Creation screen that will be tied to this widget. End users will click on the widget, select a parent object, and be directed to the Mass Creation screen designated by this parameter.
- If the desired Mass Creation screen does not already exist, click **Add** and create a new screen using the screen type Mass Creation Screen. The screen ID that you give the new screen will automatically populate in the parameter value field. Once all widget settings are made and saved, the Mass Creation screen can be configured following the directions outlined in the **Configuring a Mass Creation Screen** documentation.

## Title

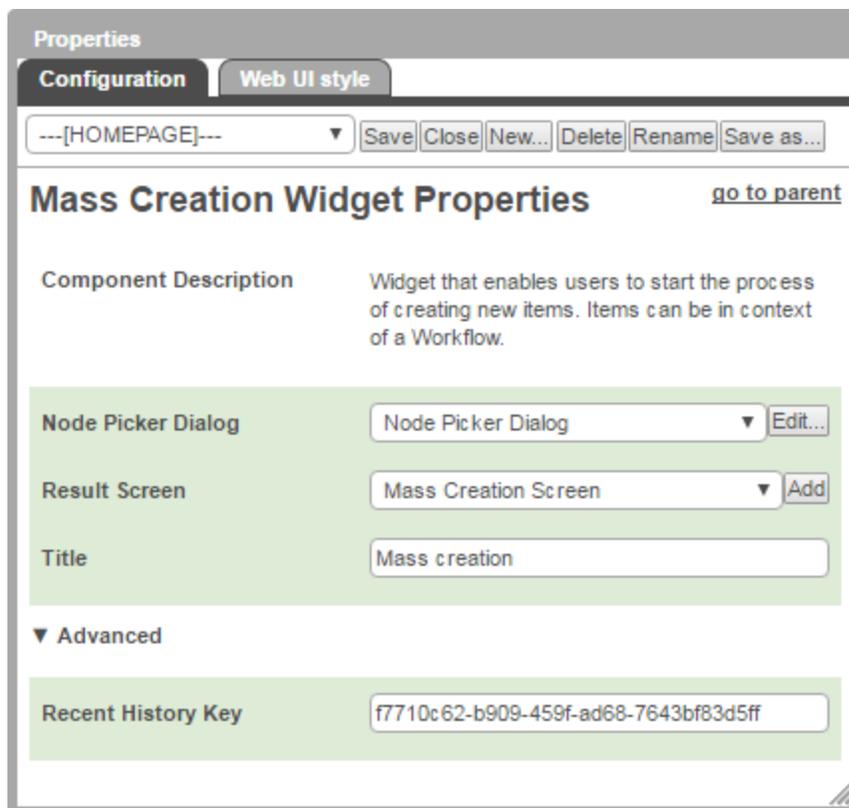
The default title displayed at the top of a Mass Creation Widget is 'Mass creation.' Since multiple widgets can be created for different onboarding needs, the title can be renamed to something more descriptive for end users.



## Recent History Key

Under **Advanced** there is a **Recent History Key** parameter. The key in the value field may be copied and pasted / used within another widget. The widgets would then share the same **Latest searches** history information.

Below is an example of the **Mass Creation Widget Properties**, fully configured:



After parameter selections have been made, click **Save** at the top of the Designer window. Close the Designer window to exit design mode and return to normal Web UI operation. If a Mass Creation Screen has not been configured yet, instead of exiting design mode, select an existing (or create a new) Mass Creation Screen to continue on with the setup process.

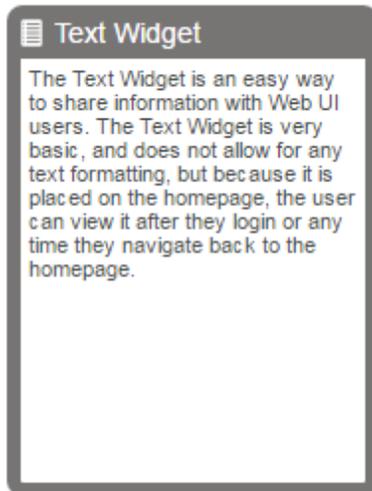
For more information, see the **Configuring a Mass Creation Screen** section of the **Web User Interfaces / Using a Web UI** documentation.

For more information about using the Mass Creation components, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

## Text Widget

The purpose of the Text Widget is to provide an easy way to display custom text to all Web UI users. Though the Text Widget does not allow for any text formatting, it is a great way to display a custom message of welcome or next steps after logging in, because it can be displayed on the homepage, where users are directed after login.

The purpose of this section is to describe each of the parameters within the Text Widget Properties.



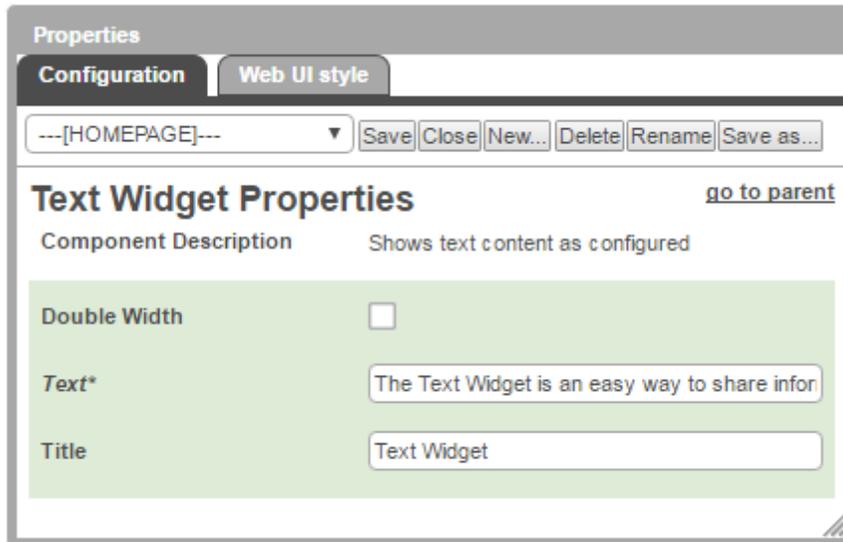
### Prerequisites

It is expected that anyone configuring the Text Widget is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer.

For information on adding a widget to the homepage, please see the **Adding Widgets to the Homepage** section of the **Home Page Widgets** document.

### Configuring the Text Widget

When configuring the Text Widget for the Homepage, there are three parameters to consider; Double Width, Text and Title.



If the **Double Width** parameter is checked, the widget is doubled in size from the standard widget single width.



The **Text** parameter must be populated for the widget to be added to the homepage. When the Double Width parameter is checked, the widget can display approximately 1300 characters. When the Single Width parameter is checked, the widget can display approximately 600 characters.

The **Title** parameter is optional. When blank, the default title, 'Text', appears. When the Double Width parameter is checked, the Title can display approximately 50 characters. When the Single Width parameter is checked, the Title can display approximately 25 characters.

## Initiate Item Screen

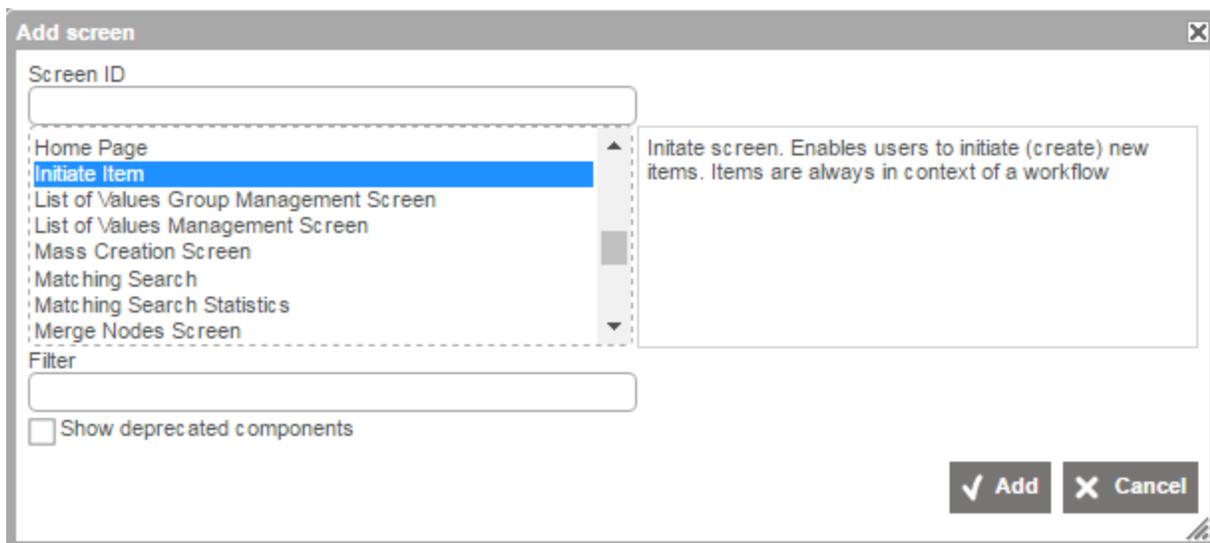
The **Initiate Item** screen is used to create new objects using STEP Web UI and initiate those objects into a workflow. Once configured, an Initiate Item screen is accessible using a Status Selector Homepage Widget and/or Status Selector Sidebar Widget.

Steps provided in this topic assume the Web UI designer is in design mode prior to starting the configuration process. For more information about getting started using a Web UI and details about design mode access / usage, see the **Web UI Getting Started** documentation.

### Adding a New Initiate Item Screen

Steps for creating a new screen using the Initiate Item screen type are below.

1. In the designer window, click the **New** button in the action icon row.
2. Choose **Initiate Item** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable when it is time to configure the screen and/or set up screen mapping.

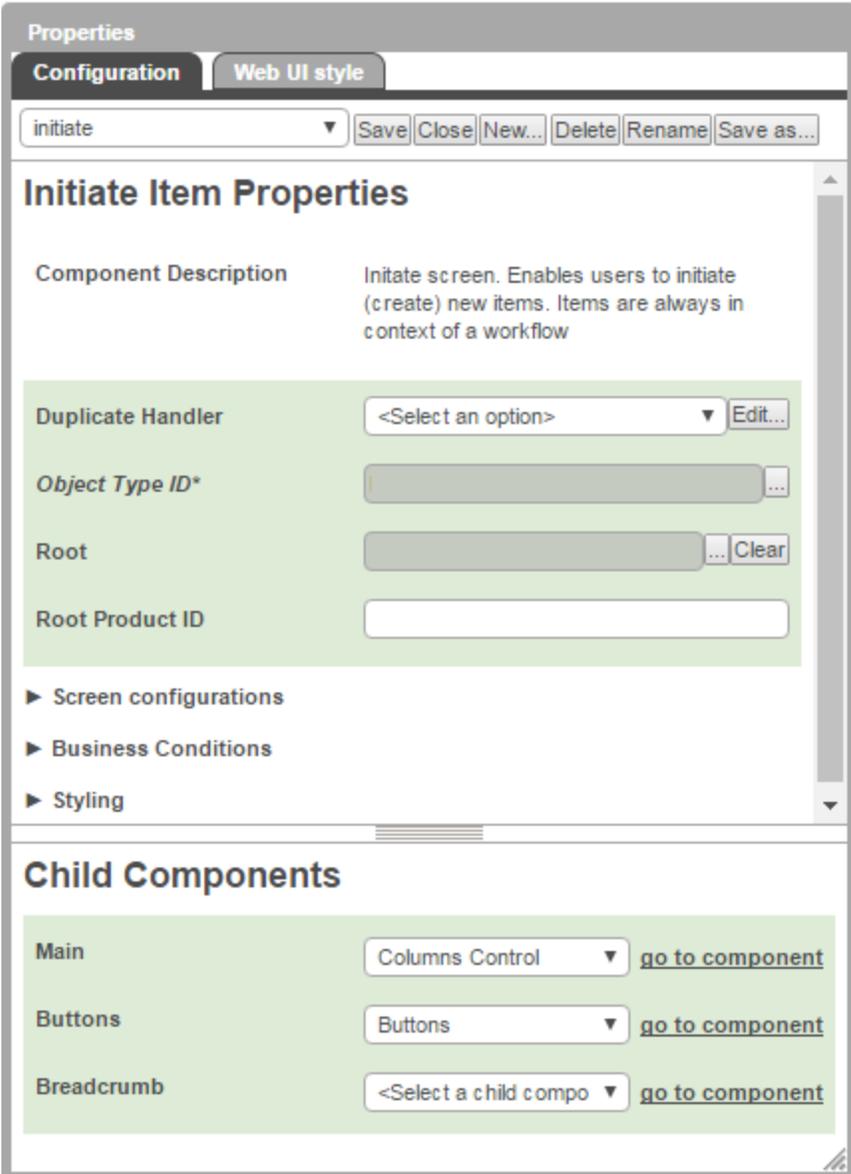


3. Click **Add**.
4. At this point, either close the designer and configure the screen at a later time, or continue on with the **Initiate Item** configuration. You must do Step 1 of the next section before you can successfully save Initiate Item Properties.

### Configuring Initiate Item Properties

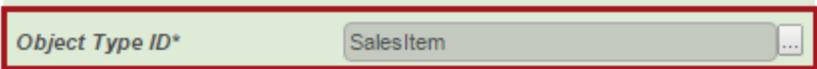
Some STEP Web UI templates include a pre-configured Initiate Item screen type with a screen ID 'initiate.' If using the existing 'initiate' screen, there may be modifications required to the default settings. These are touched on later in this topic under the **Editing Pre-configured Initiate Item Properties** section.

The steps in this topic outline how to create a new screen and configure the parameters to your data structure and can be adapted to edit an existing screen.

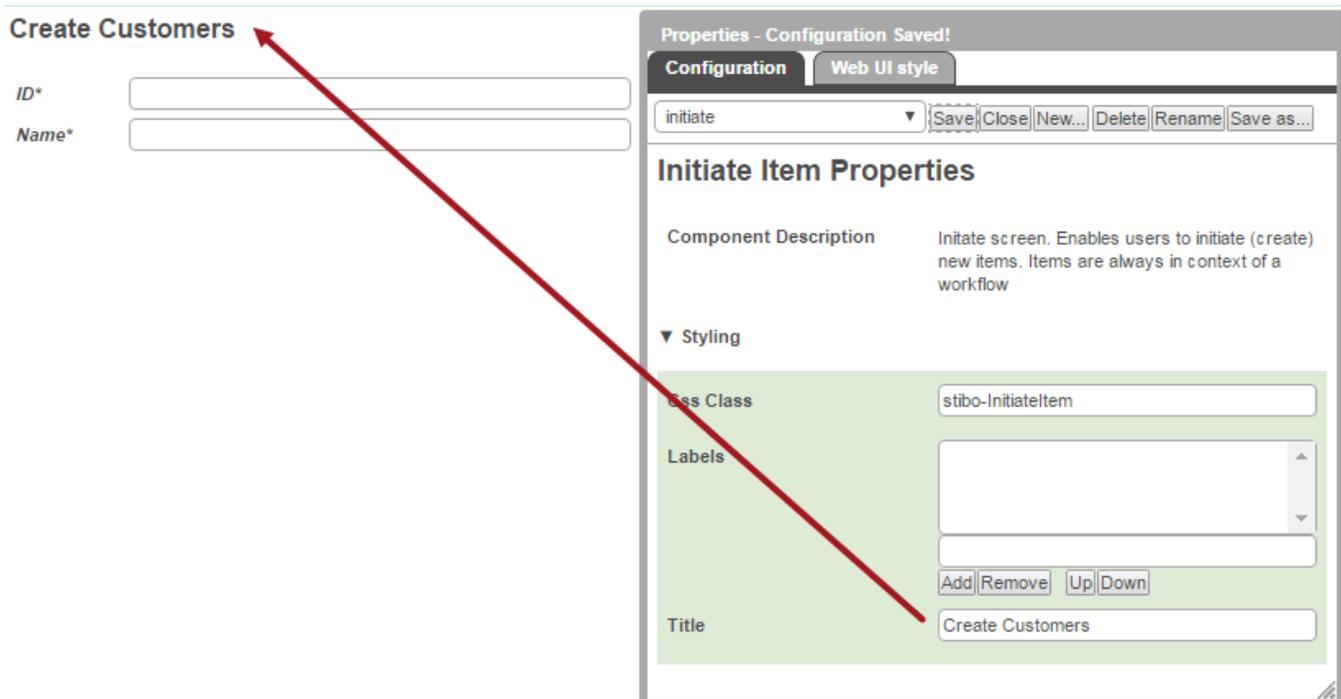


### Initiate Item Master Components

1. For the **Object Type ID** parameter; click the ellipsis button (...) to make a single selection from the 'Select Node(s)' dialog. When new objects are created using this screen, they will be created as the object type selected. In the example below, the Object Type is set to 'SalesItem.'



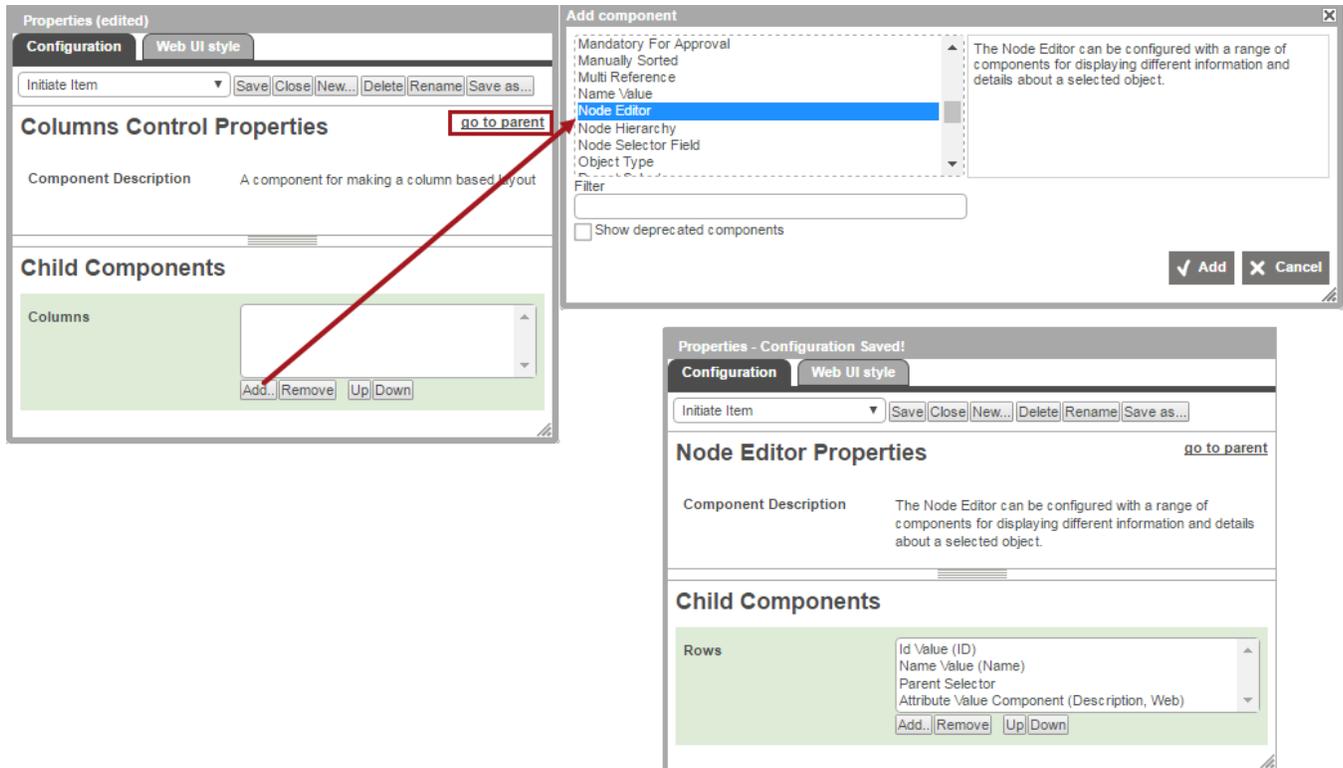
2. If all new items will be created below a specific root node, click the ellipsis button (...) to make a **Root** parameter selection. If not all new items should be created in the same location, skip this step and instead use a component on the screen that allows the user to pick the parent (see Step 4 of the **Initiate Item Child Components** section).
3. The **Root Product ID** parameter field should be blank.
4. Click **Screen configurations** to access the **Forwarding Screen** parameter. Using the dropdown, you can choose a screen (by screen ID) to forward the user to once they have initiated an item successfully. If the desired screen does not exist, one can be added and configured at a later time.
5. Click **Business Conditions** to display additional parameters:
  - **Business Conditions:** Click **Add...** to select an existing business condition to be executed to validate attribute values on the node being edited. Multiple business conditions can be added, but all must succeed for the process to continue. For more information about Business Conditions, see **Overview of Business Conditions** in the **Business Rules** documentation.
  - **Disable Auto Vendor:** Click the checkbox to disable automatic linking to the supplier (vendor classification), if desired and applicable to your Web UI usage / setup.
6. Click **Styling** to display additional parameters.
  - **Title:** The default title (Initiate Item) can be used as-is or a more descriptive title can be typed in to the value field. Titles are displayed at the top left of the screen. In the example screenshot below, the default value is overwritten with 'Create Customers.'



## Initiate Item Child Components

The options you pick may not exactly match the steps below. These components are configurable based on your setup needs and preferences. As an example, in Step 1 below, you are instructed to select Columns Control. Some Web UI setups may use Tab Control in place of Columns Control. The steps to configure a Tab Control component (or any other selection) will differ slightly than outlined below. Follow the Properties dialogs presented to you on the screen.

1. For **Child Components > Main**, choose **Columns Control** from the dropdown. Then click on **go to component**.
2. In Columns Control Properties, click the **Add** button below the Child Components > Columns field and select **Node Editor**. Click **Add**.
3. Back on Columns Control Properties, double click the **Node Editor** title in the Columns value field.
4. Click **Add** to make selections under Node Editor Properties > Child Components > Rows. These selections are the fields that will display on the Initiate Item screen as users create and initiate objects. Examples include ID Value, Name Value, Attribute Value Component, Attribute Value Group Component—anything that should have a populated value during the initial creation of an object.
  - If initiating items into different root nodes within the object structure, a component such as 'Parent Selector' can be added so that the user can select the root node for each object created. As explained earlier in this topic, if all objects should be created under one static root node, then that selection can be made in the Initiate Item Properties > Root parameter.
5. Click **go to parent** on Columns Control Properties to return to Initiate Item Properties.



6. Back on the Initiate Item Properties screen, go to **Child Component > Buttons** and select **Buttons** from the dropdown. Then, click on **go to component**.
7. On **Buttons Properties**, click the **Add** button below the Actions field, then select a component from the 'Add component' list and click **Add**. Additional configuration may be required depending on which action is selected. Here is a small sample of available Actions with brief descriptions:
  - The **Save Action** is necessary to save / create objects.
  - The **Reset Action** erases unsaved data if the user needs to clear the screen for any reason.
  - The **Find Similar Action** is used to identify similar objects prior to initiating new ones, to avoid duplicate data.

---

**Note:** The Initiate Item Properties > Duplicate Handler parameter is used with the Find Similar action button that is mentioned above. The specific setup required to use Find Similar functionality and the Duplicate Handler parameter is explained in the **Find Similar** section of the **Using a Web UI** documentation.

---

8. Repeat the previous step as needed to add additional actions. The action buttons will display in the order they are listed in the Actions value field. Reorganize by using the Up and Down buttons.
9. Click the **Save** button in the designer.

10. Click **Close** to exit design mode or use the dropdown to switch screen IDs and configure other properties.

**Important:** Initiate Item screens are accessed via status selector widgets. The appropriate screen ID must be configured as the value for the Initiate Screens parameter within Status Selector Homepage Widget Properties and/or Status Selector Sidebar Widget Properties (example screenshots below). For more information about the widgets, see the **Status Selector Homepage Widget** section in the **Web User Interfaces / Using a Web UI** documentation.

Properties

Configuration Web UI style

---[HOMEPAGE]--- Save Close New... Delete Rename Save as...

### Status Selector Homepage Widget Properties [go to parent](#)

Initiate Label:

Initiate Screens:

Add Remove Up Down

Show Initiate

Contact Workflow	
Initiate Contact	0
State-1	0
State-2	0
State-3	0
End_State	0

### Initiate

English US Main

Contact Name

Phone Number

▼ Contact to Contact

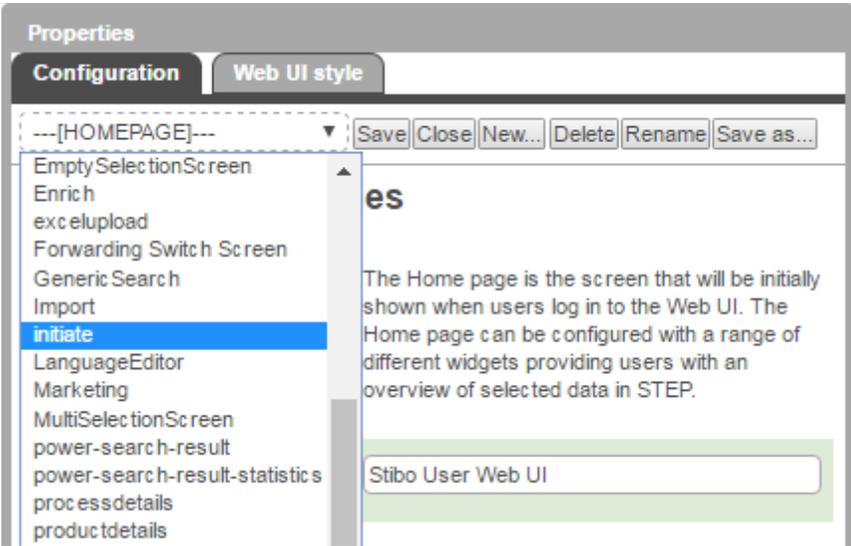
Contact Name

Phone Number

Save Find Similar

### Editing Pre-configured Initiate Item Properties

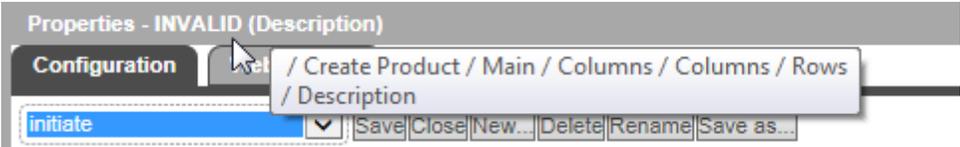
If you use one of the standard STEP templates when creating a Web UI, an Initiate Item screen type may already exist and have an 'initiate' screen ID. Below is an example from a User Web UI template.



If an 'initiate' screen ID does exist, then Initiate Item Properties comes pre-configured. However, the configuration needs to be reviewed and edited to fit your data structure. If you enter design mode and the Properties dialog indicates that there are INVALID settings, you need to update and/or remove the parameters / components that are not valid for your data structure. For troubleshooting, the Properties dialog header identifies INVALID settings. Hovering over the INVALID text displays the path to the parameter / component where there is a problem.

An example is shown in the screenshot below. When accessing the pre-configured Initiate Item screen (screen ID: initiate) in designer, an INVALID (Description) message is displayed in the Properties header. Navigating to the Node Editor (via Initiate Item Properties Main > Child Components > Columns Control), you can see that the Attribute Value Component (Description) is the offending value. The Attribute Value Component can be edited to display a valid attribute, or the component can be removed from the Rows value field.

Additional errors may exist and need to be fixed using the information described above and the error messages given on the screen.



### Create Product

ID\*

Name\*

Value Value has errors

Value Value has errors

Value Value has errors

Value Value has errors

AssetValue

Properties - INVALID (Description)

Configuration Web UI style

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

### Node Editor Properties

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

### Child Components

Rows	
	Id Value (ID)
	Name Value (Name)
	Attribute Value Component (Description)
	Attribute value Component (Manufacturer P...

Add... Remove Up Down

Properties - INVALID (Description)

Configuration Web UI style

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

### Initiate Item Properties

Component Description Initiate screen. Enables users to initiate (create) new items. Items are always in context of a workflow

Duplicate Handler <Select an option> Edit...

Object Type ID\* Product

Root step://product?id=Sample Data Clear

Root Product ID

- Screen configurations
- Business Conditions
- Styling

### Child Components

Main Columns Control go to component

Buttons Buttons go to component

Breadcrumb <Select a child compo go to component

When the Properties header changes to '(edited)', invalidity issues have been fixed. Configuration can continue, and Initiate Item Properties can be saved.

Properties (edited)

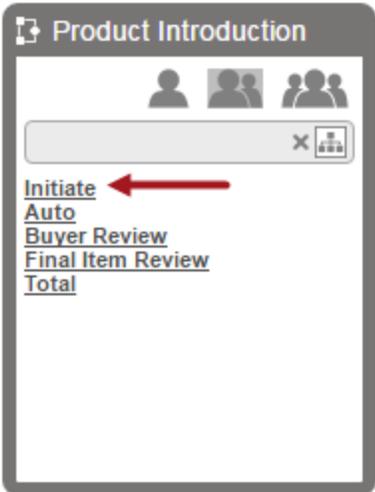
Configuration Web UI style

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

## Using an Initiate Screen

A simple usage example follows:

A user clicks on the Initiate link on a Status Selector Homepage Widget.



The Initiate Item screen displays. This particular Initiate Item screen displays via a Tab Control component (Initiate Item Properties > Child Components > Main) on a Tab Page.

A screenshot of the 'Initiate Item' form. The form has a title bar with 'Initiate Item' and utility icons (gear, language 'English US', 'Main', refresh, search, home). Below the title bar are two tabs: 'Basic Information' (selected) and 'Category Information'. The 'Basic Information' section contains three input fields: 'Name' with the value 'LIGHTS-10', 'UPC' with the value '123123123123', and 'Manufacturer Name' with the value 'I.C. Enterprises'. Each input field has a small circular icon with a lightning bolt and a double-slash icon. At the bottom of the form are two buttons: 'Save' and 'Download QuickSheet'.

Once the object information is entered, the user clicks the Save button (above) and a success confirmation message displays (below).



Below is verification that the newly created object was automatically initiated into the workflow that is configured within the Status Selector Homepage Widget Properties.

**Browse**

- Products
  - Apparel
  - Footwear
  - Safety
  - Hardware
    - Tools
      - Task Lighting
        - Flashlights
          - Flashlights Items
            - 20862
            - 20883
            - LIGHTS-10**
          - Flashlights SalesIter

**Item**

Category Information    Additional Information    Packaging Hierarchy    **Status**    Revisions    Referenced By

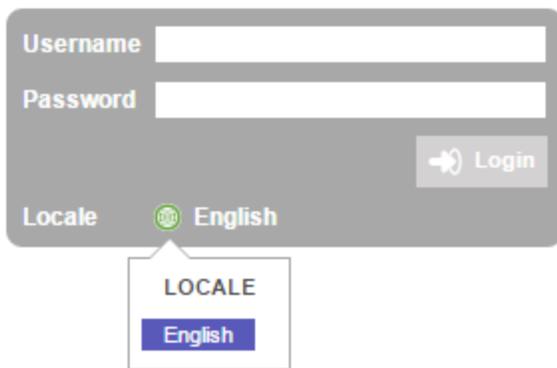
Active in workflow states	Workflow name	Workflow state	Status
	Item Creation	Supplier Enrichment	
Revision	Date: 2016.05.18 Revision number: 0.1 Last Edited by: USER Time: 09:05:13		

## Localizable Dates in Web UI

While STEP handles ISO dates better than localized dates when doing search, compare, and order operations, many users want to see localized dates and times displayed when they are in the Web UI.

Attributes with ISO Date and ISO Date and Time validation types can be configured to display in a localized format when set up to display using an Attribute Value, Parent Value, and Attribute Value Group Component within a Node List or while displayed using an Attribute Value and Attribute Value Group Component within a Node Editor.

Just like the Web UI localization of the Date attribute, which is shown localized by default, the locale is defined by the selection made during login.



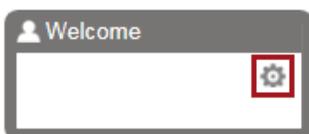
Dates converted to locale will follow the DateFormat.SHORT Java formatting style. Times converted to locale will be the DateFormat.MEDIUM formatting style.

Locale Date and Time (DateFormat) Samples	English (United States)	Danish (Denmark)	French (France)
Date (SHORT)	8/14/15	14-08-15	14/08/15
Time (MEDIUM)	11:25:40 AM	11:25:40	11:25:40

## Localization Setup

To localize the ISO Date and ISO Date and Time attributes displayed in Web UI, follow these steps.

1. Log in to the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the homepage (in the user widget) or enter design mode from another Web UI page.



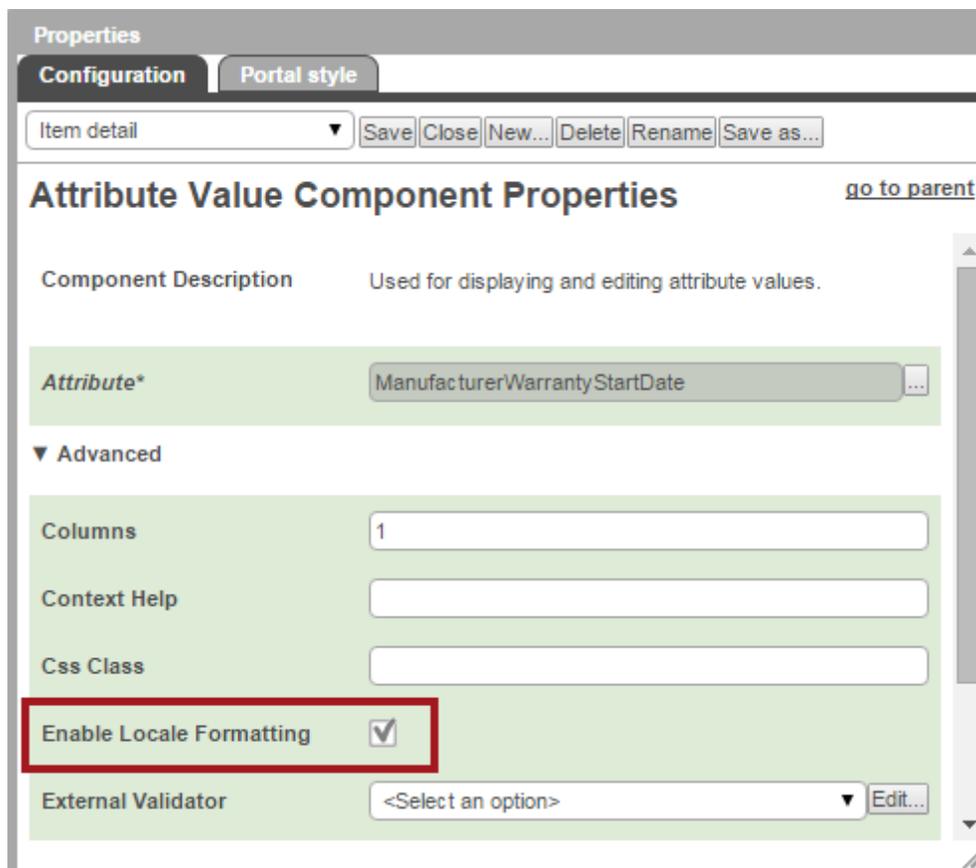
3. Navigate to the Node Editor or Node List properties screen to edit the date attributes.
4. On the Attribute Value Component, Parent Value, or Attribute Value Group Component properties screens (for Node Editor) or the Attribute Value Header and Attribute Value Group Header properties screens (for Node List), click on the Advanced arrowhead to expand the Advanced options.
5. Click on the box to the right of Enable Locale Formatting.
6. Save and close the properties screen.

The dates will now show as localized on the screen. The values will continue to display localized based on the login locale until the Enable Locale Formatting parameter is disabled.

As an example, here is an attribute with a ISO Date Validation Base Type prior to localization as shown in Web UI designer mode:

Manufacturer Warranty Start Date yyyy-MM-dd

Under Advanced, the properties screen is now configured to localize the selected attribute.



Here is the same ISO Date Validation Base Type attribute after being localized (English / US locale):

Manufacturer Warranty Start Date

Also, for example purposes, here is an ISO Date and Time attribute before and after Enable Locale Formatting is selected.

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

Manufacturer Warranty 90-Day Notice

## Considerations and Limitations

- Date localization only works on attributes with these validation base types: Date (DD-MON-YYYY), ISO Date (YYYY-MM-DD), and ISO Date and Time (YYYY-MM-DD HH24:MI:SS). Changing the way these attributes display in Web UI does not impact the validation base type.
- Web UI ISO Date display settings are configured per component and display mode, meaning that they must be individually set in each instance where the localized display is desired.
- For information regarding converting existing attributes from Date to ISO Date validation type, see the 'Converting Attributes from Date to ISO Date' section of the System Setup / STEP Super User documentation.

# Main Properties

The **Main Properties** configuration determines the overall behavior of a Web UI.

All the steps provided in this topic assume the Web UI designer is in design mode and on **Main Properties** prior to starting the configuration process. For more information about getting started using a Web UI and details about design mode access / usage, see the **Web UI Getting Started** documentation.

**Properties**  
Configuration | Web UI style

---[MAIN]--- Save Close New... Delete Rename Save as...

### Main Properties

**Component Description** MAIN is used for configuring the overall behaviour of the Web UI. For example by setting up conditional mappings it is possible to decided the behaviour when navigating the Web UI. In addition the different side panels (left, right, top, bottom) and Corner bar can be configured on MAIN.

**Mappings**  
Address Root Node Details (ObjectType = AddressRoot )  
Mass Creation Test (ObjectType = Product user-type root & Is Product )  
Address Detail Screen (ObjectType = CD\_Address )  
L4 screen (ObjectType = SaleItemFolder )  
Add... Edit... Remove Up Down

**Bottom Height** 80  
**Left Width** 240  
**Resizable**   
**Right Width** 120  
**Top Height** 40

**Representation List**  
Data Visualization Representation  
Add... Edit... Remove Up Down

▶ **Advanced**

### Child Components

**Right**  
Add... Remove Up Down

**Bottom**  
Add... Remove Up Down

**Top**  
Add... Remove Up Down

**Left**  
Stack Panel  
Add... Remove Up Down

**Corner Bar**  
Corner Bar go to component

▼ **Advanced**

**Business Conditions**  
Add... Edit... Remove Up Down

**Default Side Panel** SHOWN

**Info Alert Close Delay**

**Preferences**  
Screen Preference (SHOWN / productfolderdetails )  
Screen Preference (SHOWN / Blank )  
Screen Preference (SHOWN / productdetails )  
Add... Edit... Remove Up Down

## Configuring the Parameters

### Mappings

Screens display in Web UI based on the Mappings values. When a new screen is created, typically a mapping also needs to be set up. The mappings are shown as 'screen ID (condition)' for the Mappings parameter and are evaluated one-by-one in the order shown. When the first mapping condition is met, the evaluation stops, and the screen configured for that condition is displayed. If no mappings match, then the default target screen is the Homepage.

The screenshot shows two overlapping dialog boxes. The top dialog, titled "Add component - configure required properties", contains a "Screen Mapping Properties" section. It has a "Component Description" and a "Conditions\*" list. Below the list are buttons for "Add...", "Edit...", "Remove", "Up", and "Down". A red circle '1' is next to the "Add..." button. Below the list is a "Screen\*" dropdown menu with "homepage" selected and an "Add" button. A red circle '4' is next to the "Add" button. The bottom dialog, titled "Add component", shows a list of conditions: "Advanced Search Selection Condition", "Always True Condition", "Asset Condition", "Background Process Condition", "Background Process List Condition", "Classification Condition", "Collection Condition", and "Collection Group Condition". A red circle '2' is next to "Background Process List Condition". To the right is a text area "Select a component to see its description". Below the list is a "Filter" field and a checkbox "Show deprecated components". At the bottom right are "Add" and "Cancel" buttons. A red circle '3' is next to the "Add" button. At the bottom of the main dialog, there are "Add" and "Cancel" buttons. A red circle '5' is next to the "Add" button.

The mapping order should be evaluated based on your system and all efforts should be made to avoid mapping conflicts (e.g., multiple mappings that use the same condition but different screens).

1. Click the **Add...** button for the Mappings parameter.
2. Make a condition selection by clicking the **Add** button under the value field box.
3. Within the 'Add component' dialog, click on a component name to see its description. Make a selection by clicking on a component, and then clicking **Add**.

4. Additional properties screens may display if additional parameters need to be configured for the condition selected (e.g., Object Type, Workflow). As needed, make parameter choices and click Add.
5. Back on Screen Mapping Properties, repeat steps 2, 3, and 4 to add multiple conditions to the value field, if applicable. Note that all the conditions for an individual mapping will need to be met for the mapping to apply.
6. Make a **Screen** selection using the dropdown selector. (If the desired screen does not already exist, click Add to the right of the Screen dropdown and follow the steps to create a new screen. Configure the new screen after saving the Main Properties.)
7. Click **Add**.
8. If needed, edit existing Mappings selections and/or re-order the mappings using the Up and Down buttons.
9. Click **Save** in the designer to save the current settings. Do not close the designer unless you have finished configuring all the other parameters (outlined in the rest of this topic).

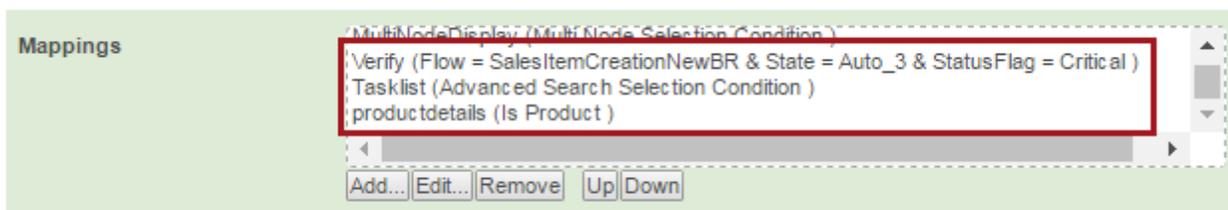
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**Note:** When navigating through Web UI, the first condition / screen mapping that applies takes precedence over any other valid mappings applicable to the selected object. If encountering the incorrect screen when navigating Web UI, check the condition / screen combinations and rearrange the mappings as needed.

---

**Example:** You are using Advanced Search. After doing a search, you click on an object link in the results list. This object is a product and is currently flagged as critical in state Auto\_3 of the SalesItemCreationNewBF workflow.

Although the object is a product and you are making a selection within a set of Advanced Search results, you will navigate to the Verify screen. This is because that is the first condition met from within the mappings list. While three mappings are applicable for this one object, the first mapping takes precedence over the other two.



## Height / Width Settings

The height and width settings apply to the components set up to display as Child Components in Main Properties (described in detail later in this topic). The default pixel value for height and width settings varies depending on the template used when originally creating your Web UI.

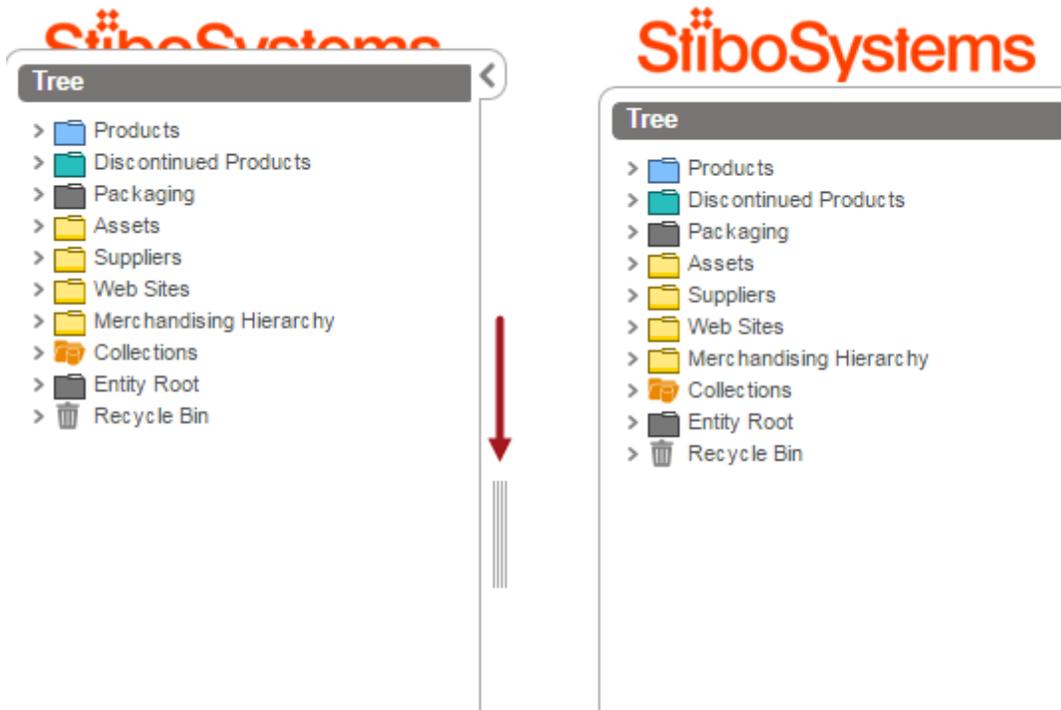
The screenshot below shows the default pixel settings shared by the Web UI templates. The Left Width default may vary slightly (240, 280, 300) depending on the template used. All can be adjusted as needed.

Bottom Height	<input type="text" value="80"/>
Left Width	<input type="text" value="300"/>
Resizable	<input checked="" type="checkbox"/>
Right Width	<input type="text" value="120"/>
Top Height	<input type="text" value="40"/>

- **Bottom Height:** Determines the height of a component added to the Child Component > Bottom. The component is placed on the bottom of the screen and expands up. The greater the number of pixels, the taller the component.
- **Left Width:** Determines the width of the component added to the Child Component > Left. The component is placed on the left side of the screen and expands out to the right.



- **Resizable:** Applies to all child components configured in Main Properties. When enabled, a drag handle (shown in the next screenshot) appears so that the child component can be resized manually; the resizing takes effect for a single screen session and the height / width parameter settings apply again automatically upon the next log in. If disabled, the drag handle does not display on the screen nor does the tab used to expand / collapse the component. *Note that if the Advanced > Default Side Panel parameter is set to COLLAPSED, disabling this setting will create an error when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.*
- **Right Width:** Determines the width of the component added to the Child Component > Right. The component is placed on the right side of the screen and expands out to the left.
- **Top Height:** Determines how far down from the top of the screen the left and right child components are placed; the higher the number, the more space there is from the top of the screen to the top of the components. An example follows.

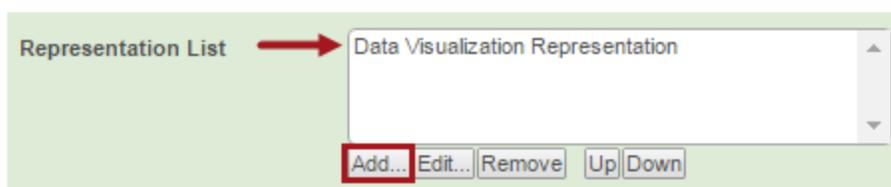


In the screenshot above, the stack panel on the left is shown with a Top Height setting of 20 and Resizable is enabled. The stack panel shown on the right side of the screenshot has a Top Height of 40 and Resizable is disabled, so there is not a drag handle nor a tab visible to the right of the stack panel.

## Representation List

The Representation List parameter is part of the Data Visualization functionality within Web UI. The object type and reference settings can be made one time using the Data Visualization Representation component and applied anywhere a Display Relations Screen is used.

If a Display Relations Screen type is not in use anywhere in the Web UI, then skip this parameter.



1. Click the **Add...** button under the value field.
2. Double click the **Data Visualization Representation** title that populates the value field and configure the Data Visualization Representation Properties.
3. Click **Save** in the designer to save the current settings. Do not close the designer unless you have finished configuring all the other parameters (outlined in the rest of this topic).

For full details on how to configure this parameter and the subsequent component, see the **Data Visualization** section in the **Web User Interfaces / Using a Web UI** documentation.

## Advanced

Click on **Advanced** to expand the screen to display additional parameters. A description of each parameter follows. Configure each to fit your business needs.

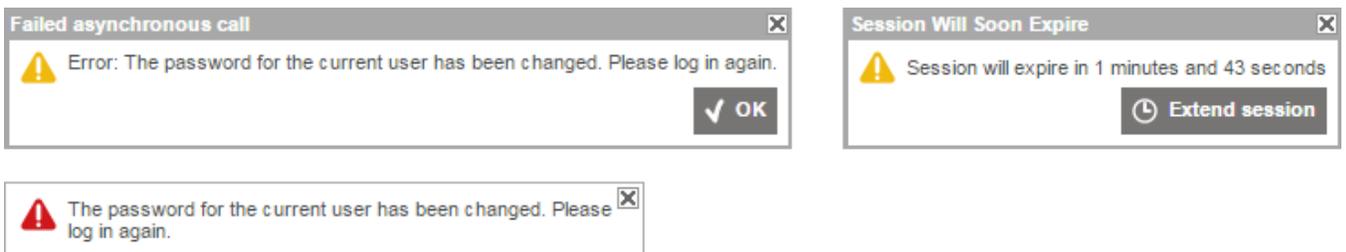
- Business Conditions**- Any business conditions added here become global conditions. This means that the conditions will be evaluated together, as applicable, with any additional business conditions configured for a screen, component, or parameter that you may be working with. For more information about business conditions, see **Business Conditions Overview** in the **Business Rules** documentation. To add a business condition to the value field:
  - Click **Add...** and then configure the Business Condition Properties that display.
  - Click **Add** to apply the condition.
  - Repeat steps 1 and 2 to add multiple conditions.
- Default Side Panel** - This setting determines the behavior of the Left child component on all the pages within Web UI. Make a selection using the dropdown. An explanation of each option follows. *This is an all-or-nothing setting but may be overwritten for certain screens based on the Advanced > Preferences configuration.*
  - HIDDEN**: Default setting; The component will not automatically display on the screen.
  - SHOWN**: The component remains static on the left side of the screen as you navigate through Web UI.
  - COLLAPSED**: The component does not automatically display on the screen but is accessible by clicking on a tab ( > ) shown on the left side of the screen. *Note that if the Resizable parameter is disabled, choosing COLLAPSED will cause an error message to display when clicking Save in the*

designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

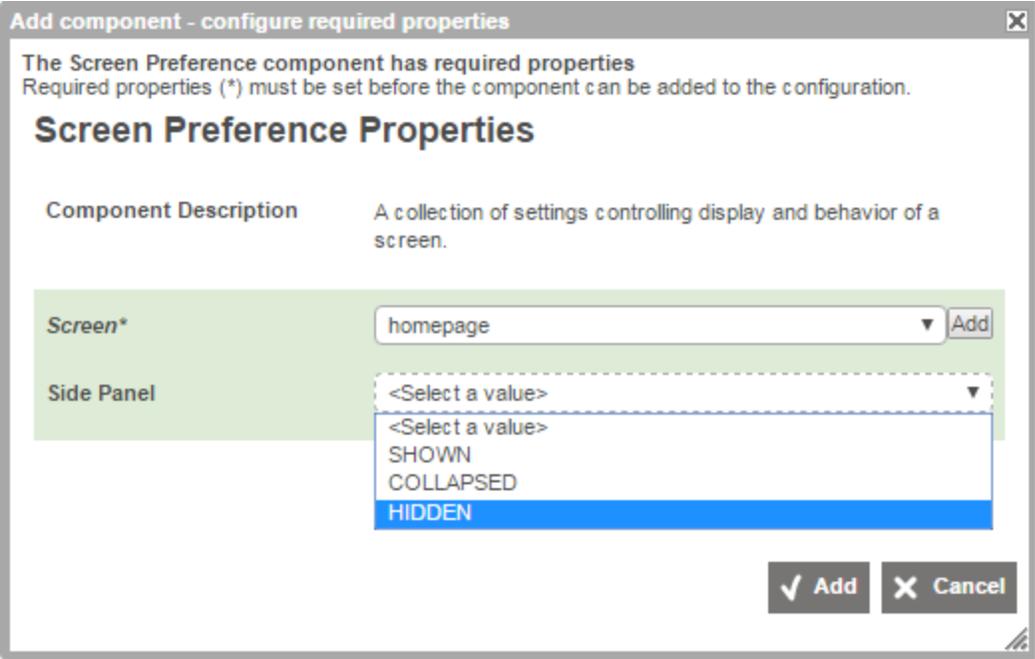
- **Info Alert Close Delay:** When set, info alert boxes, like those show below, will automatically close after the specified time (seconds). If the value field is blank, then info alert boxes will remain on the screen until the user manually clicks the close button on the message box.



If an alert requires a user action such as clicking a button to make a decision or acknowledge a message, or if the alert is a warning requiring action by the end user (e.g., fixing a validation error, re-logging in), then the close delay value does not apply. A few examples of these alert types are:

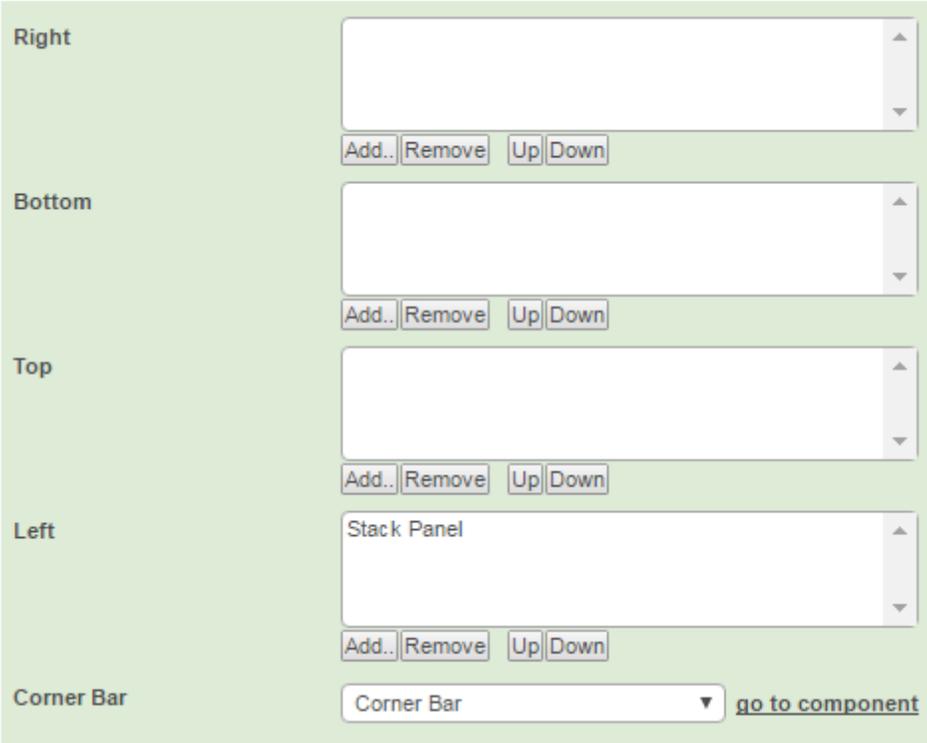


- **Preferences** - Use the Preferences parameter to overwrite the Default Side Panel settings for specific screens. As an example, you may decide that it is best to display the Left child component on some screens (e.g., Homepage) although the Default Side Panel parameter is set to HIDDEN.
  1. Click **Add...** and make or select a Screen and Side Panel setting on Screen Preference Properties.
  2. Repeat to add additional screen preferences.



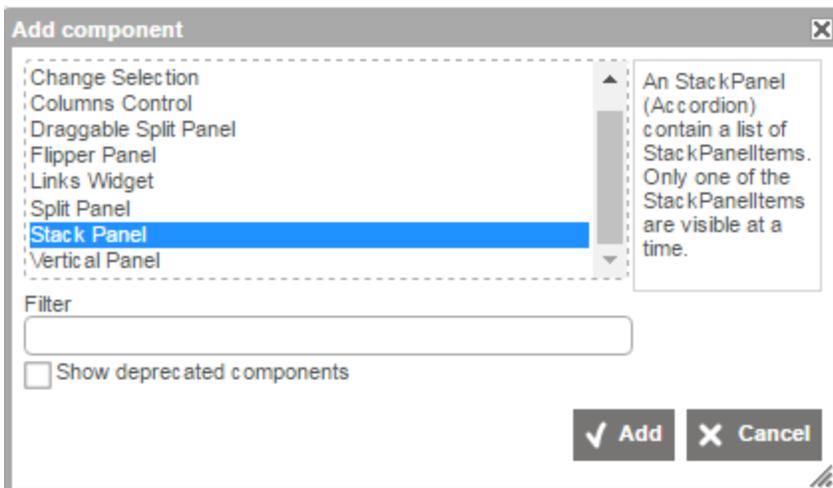
### Child Components

Add components to each screen using the Child Components section of Main Properties.



- **Right, Bottom, and Left:** When using a Web UI created from one of the standard templates, the Left parameter is already configured by default. The default value can be removed or additional selections can be added.

1. Click **Add** under any of the parameter value fields, and an 'Add component' dialog will display with options. Clicking on a component name will display information regarding what that component does.



2. Click **Add** to select a component and set parameters as needed. Configure any other parameters that may display in additional dialogs based on the component selected.
  3. Click **Add** again to add the component.
  4. Repeat steps 1, 2, and 3 to add multiple components under a single child and/or add components to another child.
- **Top:** Use the Corner Bar parameter (described below) in place of using this component.
  - **Corner Bar:** Set up the Corner Bar to get a 'mini menu' of quick navigation options that will display in the top right of the non-Homepage screens. Follow these steps:
    1. Choose **Corner Bar** from the dropdown.
    2. Click on **go to component** and in the 'Add component' dialog, make a selection and click **Add** again.
    3. Configure any additional properties (e.g., Corner Bar Simple Search Properties) that require additional parameter selections.
    4. Repeat steps 2 and 3 as desired.
    5. Click **Save** in the designer and click **Close** to return to normal Web UI operation.

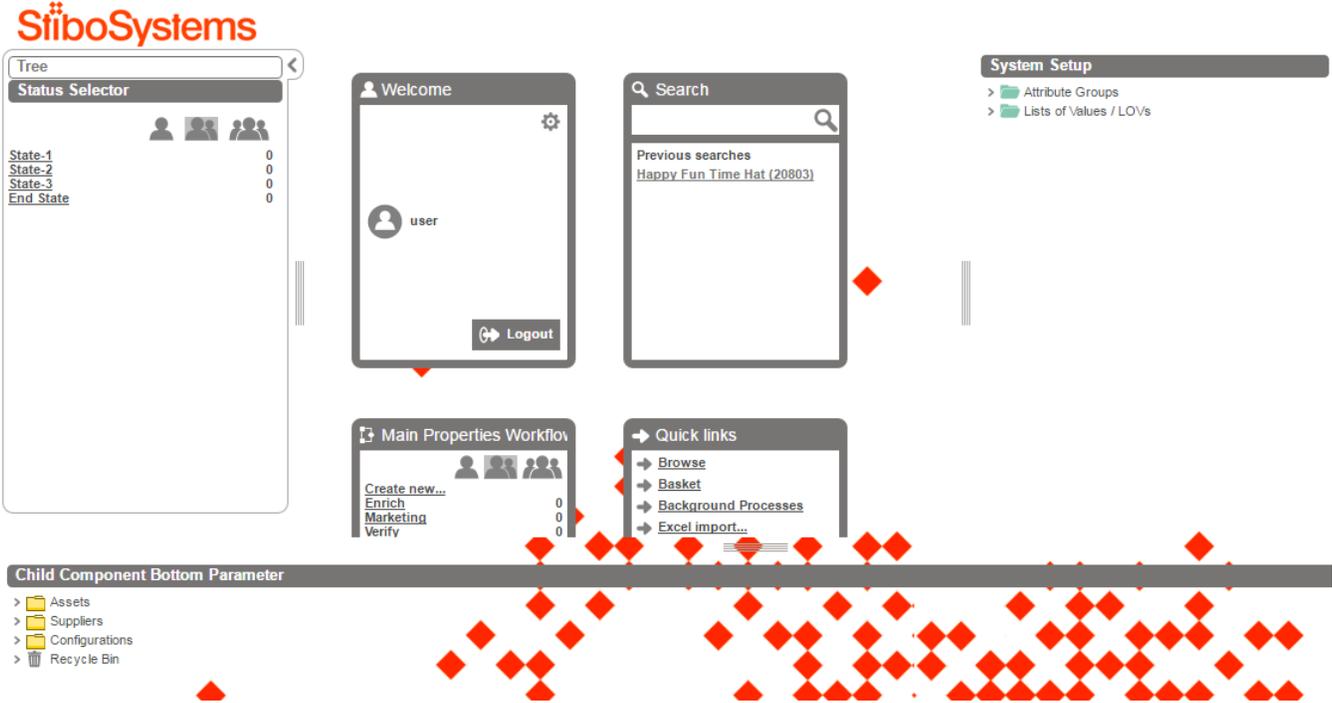
# Examples of Component Usage

## Child Components Example

Here is an example of what a Stack Panel can look like when added to each relevant child component. Each tree component is set up to display different nodes.

- **Left:** Stack Panel configured to display two Stack Panel Items: a Tree Navigator (user-titled as Tree) and a Status Selector Sidebar Widget (user-titled as Status Selector).
- **Right:** Stack Panel configured to display a Stack Panel Item > Tree Navigator (user-titled as System Setup).
- **Bottom:** Stack Panel configured to display a Stack Panel Item > Tree Navigator (user-titled as Child Component Bottom Parameter).

Configuring the screen like this (see below) may not be ideal since it does not leave much room for working with the data. However, it does provide an example of how the Main Properties > Child Components will be displayed to an end user.



The configuration order for the Right component (System Setup) is shown directly below. The Tree Navigator component is configured as the Stack Panel Item added to Stack Panel Properties. Two root nodes are selected to display. Note that if no node selection is made, then all the nodes will display.

## Child Components

Right: Stack Panel **1**

Bottom: Stack Panel

Top: [Empty]

Left: Stack Panel

Each section includes 'Add...', 'Remove', 'Up', and 'Down' buttons.

## Stack Panel Properties

[go to parent](#)

**Component Description** An StackPanel (Ac cordion) contain a list of StackPanelItems. Only one of the StackPanelItems are visible at a time.

Stack Header Height: 20

## Child Components

Items: Stack Panel Item (System Setup) **2**

Add... Remove Up Down

## Stack Panel Item Properties

[go to parent](#)

**Component Description** Part of a stack panel consisting of a content area and a title

Css Class: stb-StackPanelItem

Header Css Class: stb-StackPanelHeader

Title: System Setup

## Child Components

Content: Tree Navigator **3** [go to component](#)

## Tree Navigator Properties

[go to parent](#)

**Component Description** Display a tree component for navigating product and classification hierarchies.

Root Node URLs: step://attributegroup?id=Attribute+group+root  
step://ListOfValuesGroup?id=List+Of+Values+group+root

**4** Add... Remove Up Down

Show Leaves:

Show Recycle:

► Advanced

The Bottom component is configured similarly to the Right one. The only difference is that different nodes are selected to display.

The Left is similar to the Right and Bottom, with different nodes. There is also an additional Stack Panel Item configured to display (Status Selector Sidebar Widget).

For step-by-step instructions on how to add the Tree Navigator Component to display in the Web UI, see the **Tree Navigator Component** document in the **Web User Interfaces / Using a Web UI** documentation.

## Corner Bar Example

Here is an example of a configured Corner Bar. The symbols shown in the Corner Bar (left to right) correspond with the Corner Bar Properties > Child Components > Items values (top to bottom). Each icon is easily identifiable to the end user as hover text displays when mousing over each icon.

Properties

Configuration Web UI style

---[MAIN]---

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

### Corner Bar Properties [go to parent](#)

Component Description A compact menu bar which will position itself in the upper right corner of a screen

### Child Components

Items

- Corner Bar Design Mode Action
- Corner Bar Context Selector
- Corner Bar Workspace Selector
- Background Process Notification

Add.. Remove Up Down

The up arrow icon (shown below) on the far right is a standard icon that will display even if the Corner Bar is not selected / set up in Main Properties. Clicking this icon will take you to the Homepage.

### Product Details

English US Main

Primary Product Hierarchy > Packaging > Buy Side Packaging > Comfy Bed (pallet of footboards)

Product attributes References and Classifications Referenced By Images and Documents Language view

ID 22213

Name\* Comfy Bed (pallet of footboards)

Object Type Pallet

Approval status ✓ Approved on 10/16/15 9:39 AM

## Merging Confirmed Matches

Once two objects have been confirmed as duplicates they can be viewed on a Confirmed Matches component screen. From here, the user can decide whether to merge the duplicates together or reject the confirmation, reverting the objects back into potential duplicates. Opting to merge the matches will invoke a Merge Nodes screen, allowing users to choose which of the two objects will persist following the merge, which will be deleted, and to select the specific attribute values and outgoing references to be applied to the surviving record.

For more information about the Potential Duplicates List component, see the **Potential Duplicates List** section of the **Web UI** documentation.

For more information about how to merge confirmed matches via workbench, see the **Handling Potential Duplicates** section of the **Matching and Linking** documentation.

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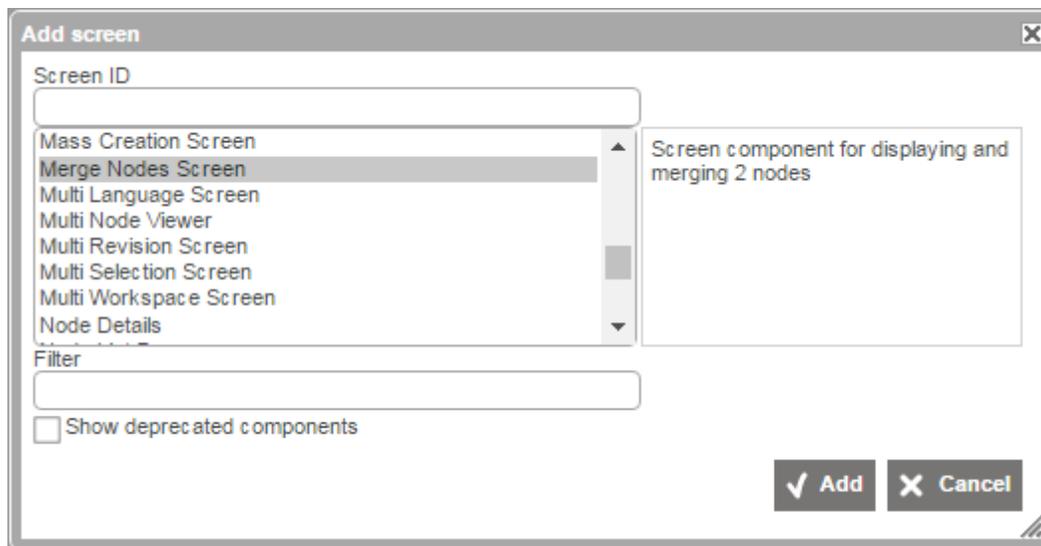
**Note:** While the Merge Nodes Screen can be used to merge random nodes of the same super type, it is intended for usage with matching algorithms using the Match Action for Identify Duplicates in conjunction with the Merge Confirmed Match From Grid action in the Confirmed Matches component.

---

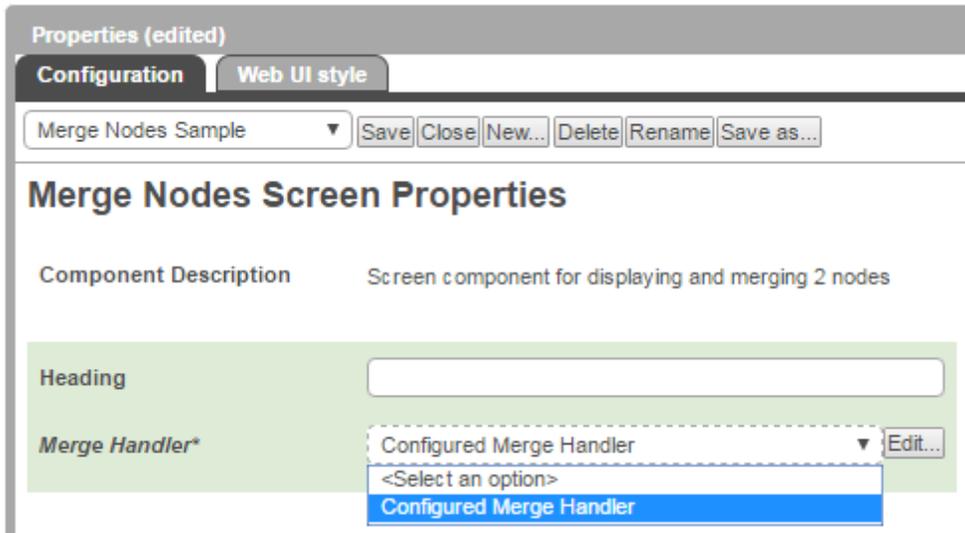
## Configuration

### Add Merge Nodes Screen

1. In design mode, select **New**.
2. In the 'Add screen' window that appears, select 'Merge Nodes Screen', enter a Screen ID, and then click **Add**.



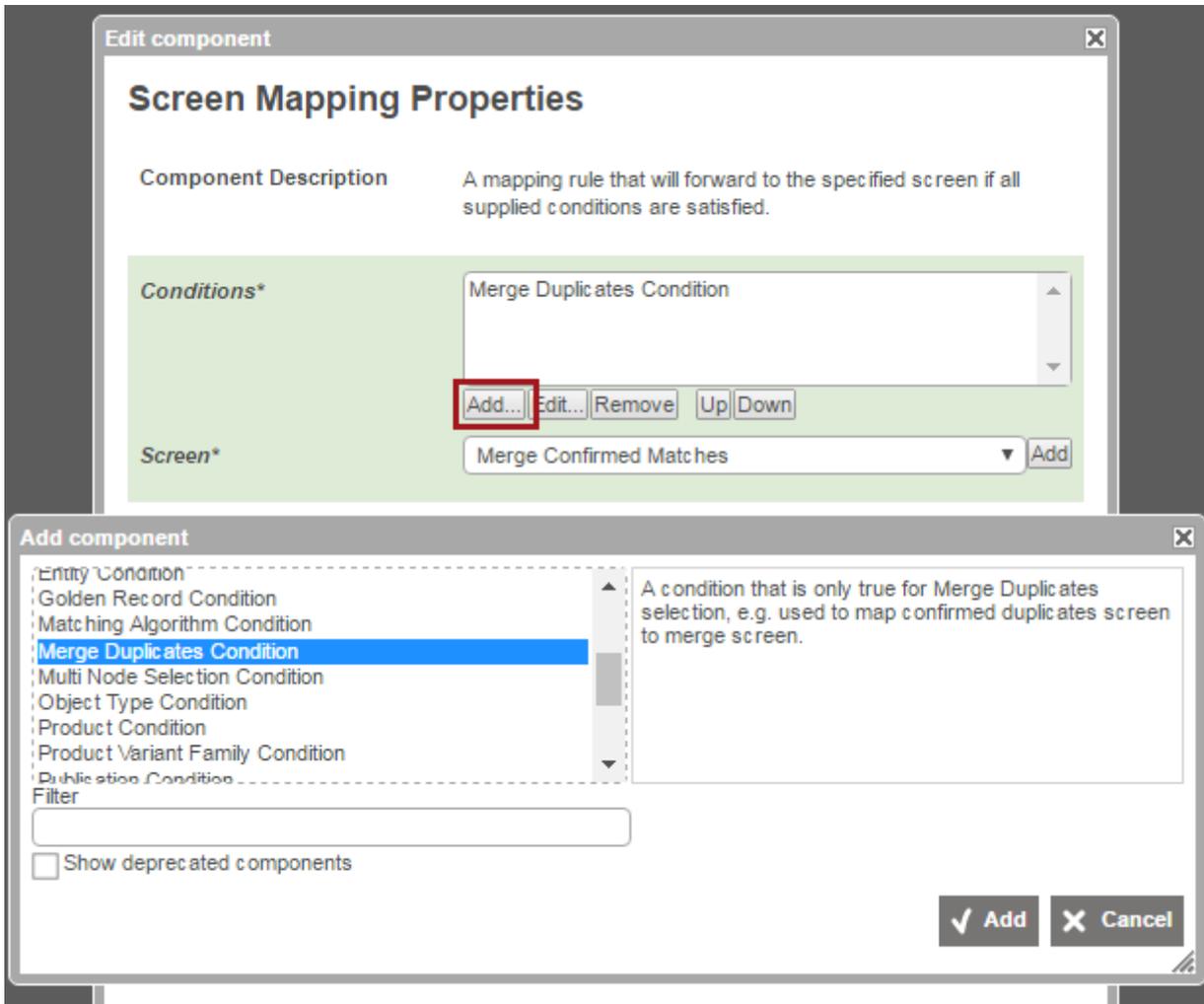
3. In the 'Merge Nodes Screen Properties' select 'Configured Merge Handler' from the 'Merge Handler' dropdown selector.



4. Click **Save**.

## Map Merge Node Screen

1. In design mode, navigate to [MAIN].
2. Under 'Mappings', click **Add**.
3. Under 'Conditions', click **Add**, and select 'Merge Duplicate Condition' from the list that appears. Click **Add**.



4. Under the 'Screens' dropdown, select the Merge Nodes screen configured in the previous section.
5. Click **Save**.

### Add Merge Confirmed Match From Grid Action

1. In design mode, select a 'Confirmed Matches' component screen. If one does not exist, configure it on any Tab Page or Node Details component.
2. Under 'Child Components', in the 'Actions' field, click **Add**.

3. In the window that appears, select 'Merge Confirmed Match From Grid Action' from the list. Click **Add**.
4. Click **Save**.

## Performing a Merge

Before beginning the merge process there are a few caveats to consider. Metadata and inherited attributes, as well as inbound references, cannot be merged. Additionally, if the object that remains after the merge does not contain data for a given attribute or reference in any context, the data is taken from the deleted object and merged into the remaining object.

All attributes and references eligible for merging will appear in the table.

1. While on a 'Potential Duplicates List' screen, choose which object to merge with the currently selected node. Next, click 'Confirm duplicate from grid'.

## Subscriber Details

English US • Main

Basic Information and References | **Potential Duplicates List** | Confirmed Matches









	A Charles	Amos Charles
Score	-	99.9 
Matching Algorithm	-	I Case B Matching Algorithm DT
Name	A Charles	Amos Charles
Object Type	Subscriber	Subscriber
Phone	9384369429	9384369429
Email	amet.consectetuer.adipiscing@Aeneaneget.org	amet.consectetuer.adipiscing@Aeneaneget.org

2. In the message that pops up, provide a reason for why they are duplicates, and then click **OK**.

**Warning** ✕

 You are about to confirm 2 objects as duplicates

Reason

3. Navigate to the 'Confirmed Matches' component screen and select which match to merge the currently selected node with. Then, click the 'merge confirmed match from grid action' button.

## Subscriber Details

English US • Main

Basic Information and References | Potential Duplicates List | **Confirmed Matches**







	ID	Object Type	Phone	Email
Amos Charles	<a href="#">I-Subscriber_0106</a>	Subscriber	9384369429	amet.consectetuer.a

4. On the merge screen that appears, choose which attributes and references will survive the merge by clicking the arrows next to them. Surviving attributes / references are highlighted green and appear in the 'Merge Results' column. Select the surviving node via the radio buttons that appear above the **Merge** button.

Compare and Merge Confirmed Matches

	A Charles (A Charles)	>>	Merge Results	<<	Amos Charles (I-Subscriber_0106)
Name	A Charles	>	Amos Charles	<	Amos Charles
City	Roswell	>	Roswell	<	Kearney
Country	United States	>	United States	<	United States
Email	amet.c onsectetuer.adipisc ing@Aeneaneget.org	>	amet.c onsectetuer.adipisc ing@Aeneaneget.org	<	amet.c onsectetuer.adipisc ing@Aeneaneget.org
First Name(s)	A	>	Amos	<	Amos
Last Name	Charles	>	Charles	<	Charles
Phone	9384369429	>	9384369429	<	9384369429
State	GA	>	GA	<	NE
Street	4722 Amber Grove	>	4722 Amber Grove	<	408-4957 Mauris Av.
ZIP	30075	>	30075	<	86536
Subscriber Duplicate		>	A Charles (A Charles)	<	A Charles (A Charles)

Select object to hold merged result  
 A Charles (A Charles)  Amos Charles (I-Subscriber\_0106)

**Merge**

- Click **Merge** to merge the two objects. The object that was not picked to survive will be deleted. Note that this deletion is not automatically approved.

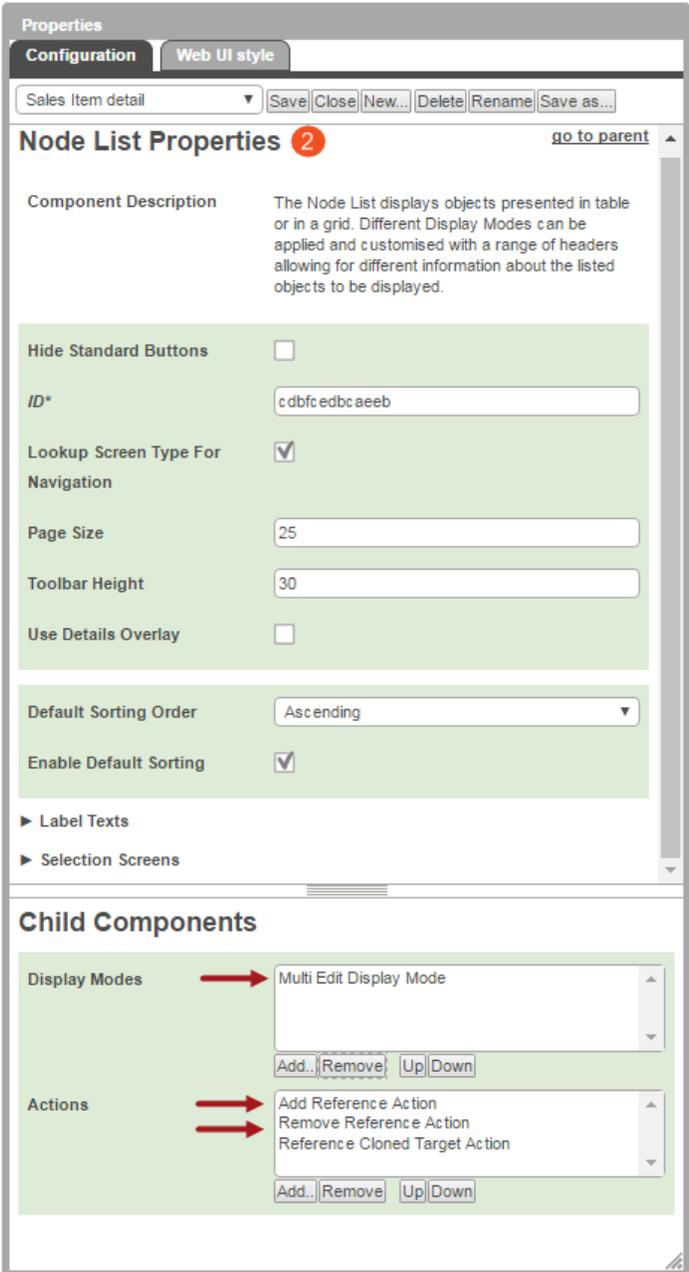
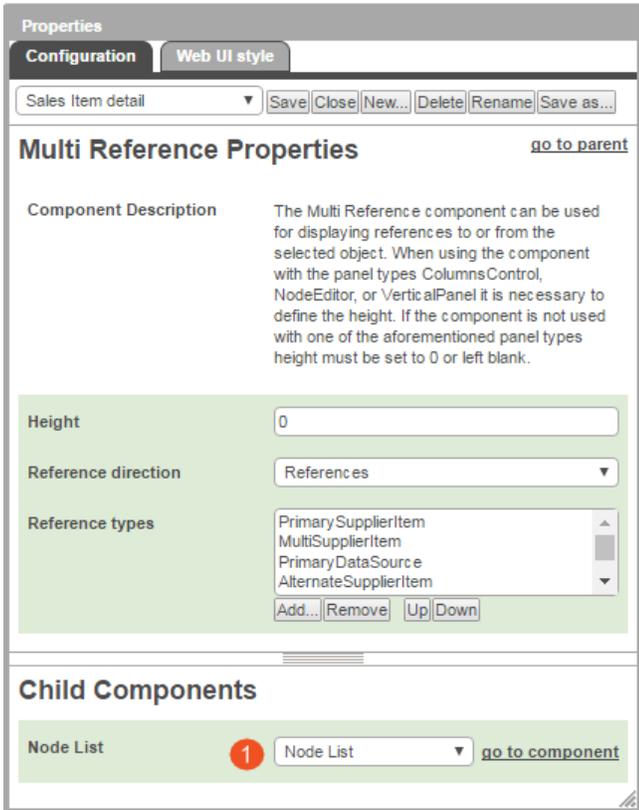
## Multi-Reference Editor

(Component name: Multi Reference. Available on a Tab Page, Node Editor, or as a child to a display mode.)

The **Multi Reference** Web UI component can be used to display references with multiple reference types and classification link types in the same table. It can be configured with a list of reference type and/or classification link types to narrow the references (links) that are shown in the table.

Additionally, it can be configured to display either forward references or reverse references (referenced by mode).

It is pre-configured with a Node List in Multi Edit Display Mode with the add and remove reference toolbar actions shown. It can be inserted where a container component can be inserted (e.g., as the content of a Tab Page or as content of the Split Panel or Columns components).



Since the Multi Reference component is based on the Node List component and the Multi Edit Display Mode, sorting and filtering of the header component values are supported. This allows for multiple reference types to be shown in the same table with the column filtering capabilities. Also, the number of reference items shown in the configured table is conveniently displayed under the table allowing a user to easily see how many references there are without having to scroll through the data.

## Item

	555-2033_M	555-22346	Acme	Acme Tire Repair Kit	L23-RP4100
ID	8801	6806	168241	168238	22624
Name	555-2033_M	555-22346	Acme	Acme Tire Repair Kit	L23-RP4100
Object Type	Installation Manual	Item	Logo	Product Image	Item
Reference type	Installation Manual	Supplier Replacement Item	Brand Name Logo	Primary Product Image	CrossReference
Thumbnail					
+ ATTGroup					
Air gauge included		Yes			No
Hose length		28			28 in
Primary Color		Black			Orange

Number of items : 5

## Multi Reference Properties

Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

### Height

When using the component with the panel types Columns Control, Node Editor, or Vertical Panel, it is necessary to go into Design mode and define the **Height** parameter found on the properties screen. If the component is not used with one of these panel types, then the height must be set to 0 (zero) or left blank.

### Reference Direction

With the **Reference direction** parameter is possible to choose the direction of the displayed references:

- References where the selection is the source (References)
- Reverse references where the selection is the target (Referenced by)

### Reference Types

Select specific reference type nodes using the **Reference types** parameter **Add** button. Reference types can be re-ordered and removed, as needed.

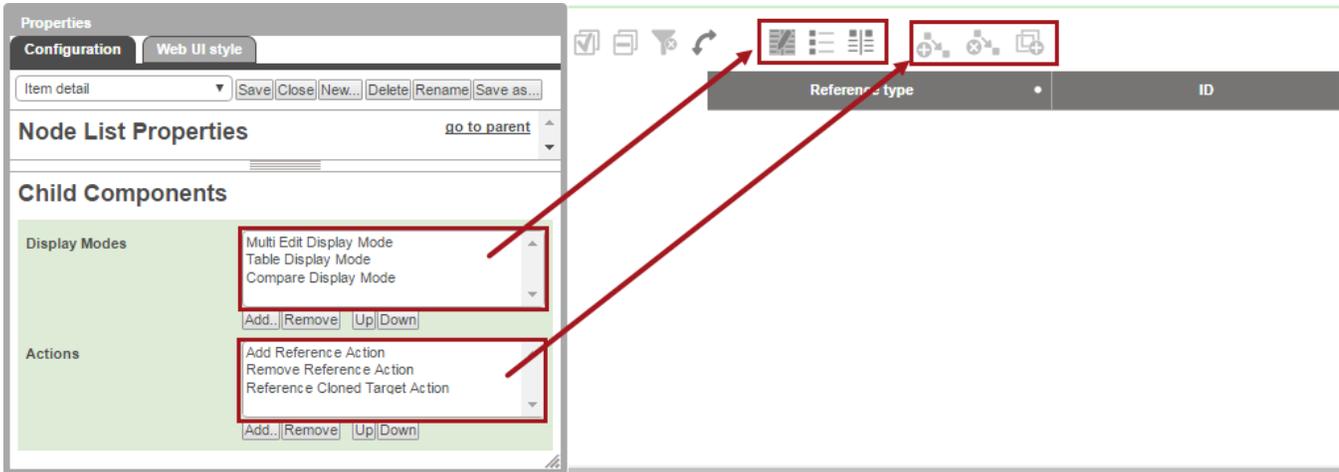
### Node List

Click on 'go to component' to the right of the **Child Components > Node List** field. The **Node List Properties** screen will display.

## Node List Properties

Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

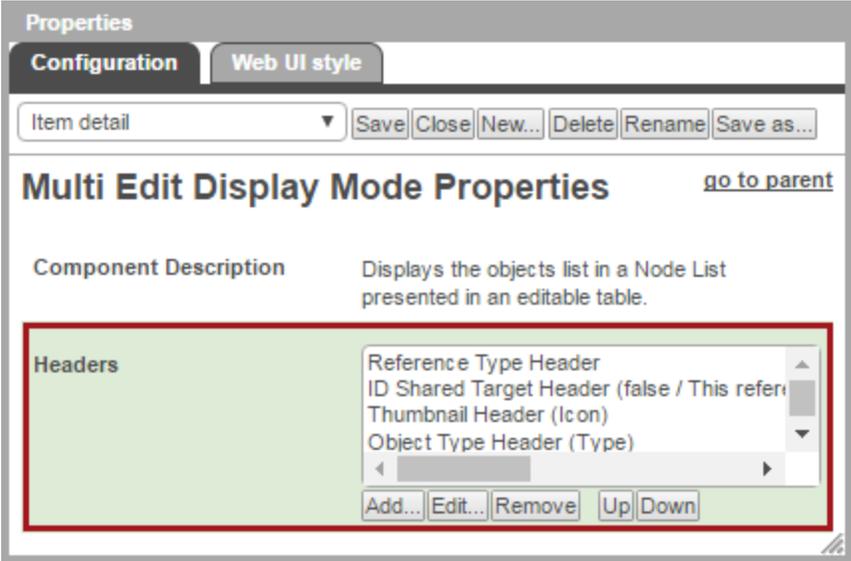
In the Child Components section of the properties screen:



### Display Modes

Click the **Add** button to select display modes. Each display mode has a corresponding button that displays above the Node List. Re-order the list or remove unneeded display modes.

One option is **Multi Edit Display Mode**, and it comes pre-configured on this particular Node List. As the name implies, you can edit multiple objects and multiple object attributes on the same screen and save the changes automatically (using the 'Use Immediate Save' parameter) or manually.



### Table Headers

While configuring the headers in Display Mode properties, a user can choose to set up the table sort order based on a specific header. By editing a particular header's properties, sorting order (ascending or descending) can be designated using the drop down next to Table Sorting. Once the properties are saved, the table will re-sort itself based on the new header settings, and the Display Mode properties will be retained until configured differently.

The Table Sorting designation can only apply to one header at a time. It has to be removed from one header before set up on another. Additionally, if 'Enable Default Sorting' is enabled / selected in the Node List properties, selecting a header to sort by overwrites this setting.

Below are some header examples. The bullet under each header explains what is displayed in that header column. Additional headers may be used (e.g., Name, ID Shared Target, Attribute Value, Attribute Value Group). When adding headers, you can read a description of each before adding them to the Headers field.

---

**Note:** It is suggested that the **ID Shared Target Header** be used in place of the ID Header to prevent unintended data changes to shared objects. When used, a visual indicator (⚠) appears in the ID cells for objects that are referenced by two or more other objects.

---

### Reference Metadata Value Header

- The value of a metadata attribute on the reference / link

### Reference Type Header

- The title of the reference type or the classification link type for the reference / link in the table

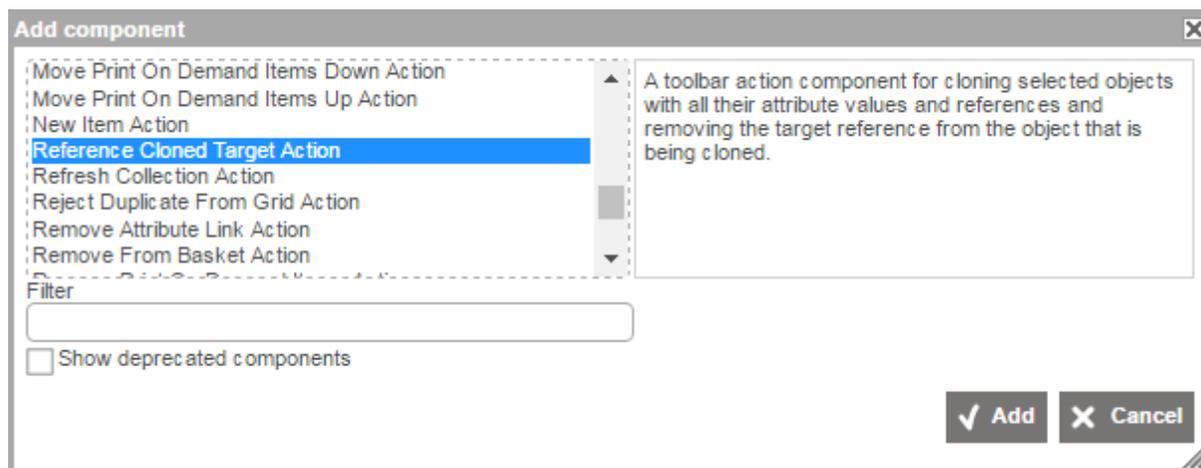
### Reference Visibility Header

- The contexts in which the reference or classification link is visible

## Actions

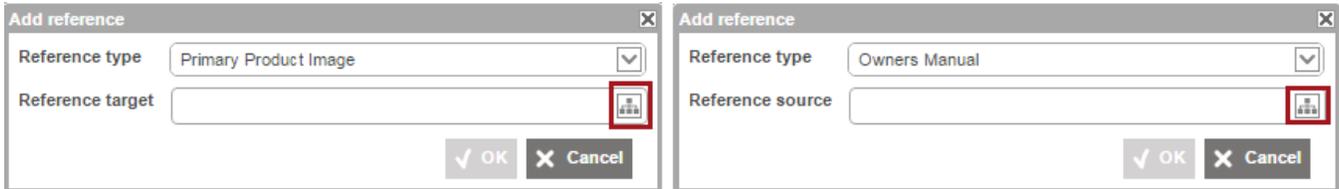
A number of action buttons can be added to a screen to be used with a Node List. These are all added and configured within the **Actions** field on the Node List Properties screen. The **Add Reference Action** and the **Remove Reference Action** come pre-configured. These actions and the Reference Cloned Target Action are described below. Other actions may be appropriate for you to use.

After you click Add, you can view action component descriptions in the 'Add component' dialog.

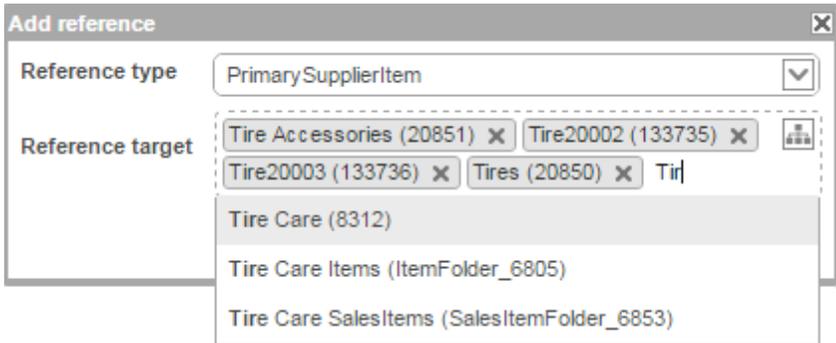


### Add Reference Action

The **Add Reference Action** component (  ) opens an 'Add reference' dialog with Reference type and Reference target / Reference source (depending on the reference direction) options.



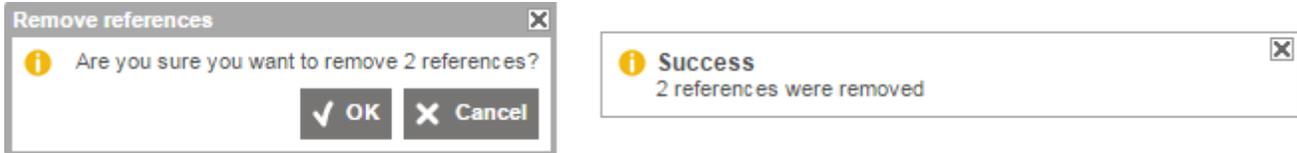
When a user clicks on a node picker icon, they are presented with standard Browse and Search tabs to use when selecting or multi-selecting an existing object or objects to reference. The 'Reference target' and 'Reference source' value fields support type-ahead (by name) functionality, which allows users to easily add and remove references without having to click through various hierarchies and/or folders.



Additional functionality can be configured that allows users to create new objects using existing objects as a template or to search for existing objects in an effort to avoid duplicating data. For more details regarding how to fully configure the properties for the Add Reference Action component, see the **Add Reference Action** section of the **Web User Interfaces / Using a Web UI** documentation.

### Remove Reference Action

The **Remove Reference Action** (  ) is enabled when a reference is selected in table. When clicked, it will show a dialog with a warning asking if you want to remove the references and telling you how many references are about to be removed. A success message displays upon removal.

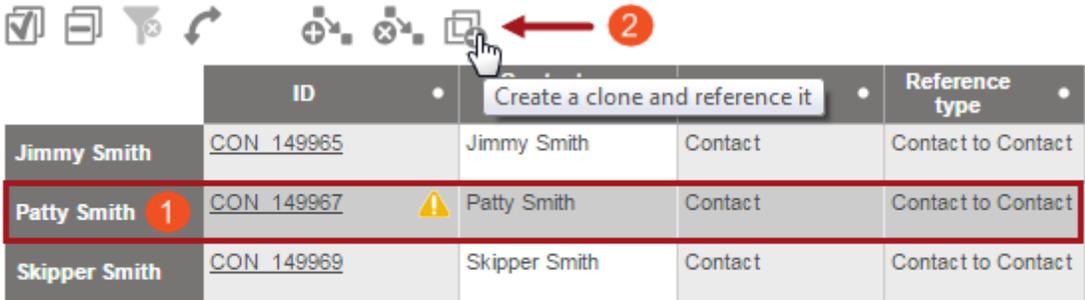


### Reference Cloned Target Action

The **Reference Cloned Target Action** (  ) allows a user to select an existing reference target and duplicate / clone it, creating a new object that includes the original attribute values and references. This is particularly useful in making sure a user does not inadvertently edit shared data that could have implications to other objects with the same reference. When a user needs to make changes to data that is shared (e.g., the object is referenced by multiple objects), they can clone the existing object and freely edit the data on the clone, without fear of impacting the other objects with references to the original object. An example is shown below.

Note that users can only clone one object at a time, and objects being cloned must use auto-generated IDs.

**Important: Asset References cannot be cloned.**



	ID			Reference type
Jimmy Smith	<a href="#">CON 149965</a>	Jimmy Smith	Contact	Contact to Contact
Patty Smith 1	<a href="#">CON 149967</a>	Patty Smith	Contact	Contact to Contact
Skipper Smith	<a href="#">CON 149969</a>	Skipper Smith	Contact	Contact to Contact

Reference cloned target

 Are you sure you want to clone the target object and set the reference to the new object?

3



	ID	Contact Name	Object Type	Reference type
Jimmy Smith	<a href="#">CON 149965</a>	Jimmy Smith	Contact	Contact to Contact
Patty Smith 4	<a href="#">CON 150883</a>	Patty Smith	Contact	Contact to Contact
Skipper Smith	<a href="#">CON 149969</a>	Skipper Smith	Contact	Contact to Contact

### Considerations and Limitations

- The Multi-Reference Editor is not compatible with the Target Value Header or Reference Link Metadata Header.
- The Multi-Reference Editor cannot be used with the Split panel display mode.

## Add Reference Action

The Add Reference Action functionality can be configured beyond the basic Browse / Search functionality described in the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

If configured to do so, the Add Reference Action dialog can also include the **Create** and **Create From Template** tabs to allow users to create new objects to reference rather than having to choose from existing objects only. Additionally, **Find Similar** functionality allows users to search for and identify similar objects on a more granular level prior to adding references and creating target objects. These tabs are all omitted by default but can be enabled within the Add References Action Properties.

All the steps provided in this topic assume the Web UI designer is in design mode and on the **Add Reference Action Properties** screen prior to starting the configuration process. It is also assumed that all users (designers and end users) have the proper privilege to work with the Multi-Reference Editor and its features. For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

### Add Reference Action Properties

Each parameter is explained following the image below. Also, the parameters required to set up the Create, Create From Template, and Find Similar tabs are described as a whole in the applicable section. Anyone designing the Web UI can determine what features or combination of features are preferred and set them up based on the descriptive info below.

Properties (edited)

Configuration Web UI style

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

### Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Navigate To Created Object

Show Create

Show Create From Template

Template Root  ... Clear

Duplicate Handler <Select an option> Edit...

Find Similar Search Fields  Add... Edit... Remove Up Down

Show Find Similar Tab

Temp Object Type For Find Similar  ... Clear

Temp Parent For Find Similar  ... Clear

Parent <Select an option> Edit...

---

### Child Components

Create From Template List <Select a child component> go to component

Find Similar List Dialog <Select a child component> go to component

The Add Reference Action component is highly configurable. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name. An expanded description of each parameter is available below.

Parameter	Description
<b>Navigate to Created Object</b>	The parameter that decides if the 'Go to created object' option on the Create tab is enabled by default; when enabled, the end user will be auto-navigated to the new object upon creation (using Create)
<b>Show Create</b>	The Create tab will be shown in the node picker dialog
<b>Show Create From Template</b>	The Create From Template tab will be shown in the node picker dialog
<b>Template Root</b>	The root node from which child objects can be used as templates (Create From Template)
<b>Duplicate Handler</b>	A parameter / option required when using Find Similar; works with Find Similar functionality to return potential duplicate objects based on search values and a matching algorithm
<b>Find Similar Search Fields</b>	The object attribute or referenced object attribute fields that end users can search upon to determine if a similar object already exists in STEP; Find Similar functionality
<b>Show Find Similar Tab</b>	The selection that determines if the Find Similar tab should be shown in the node picker dialog; if enabled, then Duplicate Handler, Find Similar Search Fields, Temp Object Type for Find Similar, Temp Parent for Find Similar, and the Child Component > Find Similar List Dialog also need to be configured
<b>Temp Object Type for Find Similar</b>	The temporary object type for objects that are stored while the Find Similar functionality is being used
<b>Temp Parent for Find Similar</b>	The location that temporary objects reside when searching with the Find Similar functionality
<b>Parent</b>	This setting allows the designer to determine a single parent under which all new objects will be created; used with Create and Create From Template
<b>Create From Template List</b>	The configurable results list when using the Create From Template functionality; List Dialog must be selected from the dropdown; a Dialog List Screen needs to be created, selected, and configured
<b>Find Similar List Dialog</b>	The configurable results list when using the Find Similar functionality; List Dialog must be selected from the dropdown; a Dialog List Screen needs to be created, selected, and configured

## Create

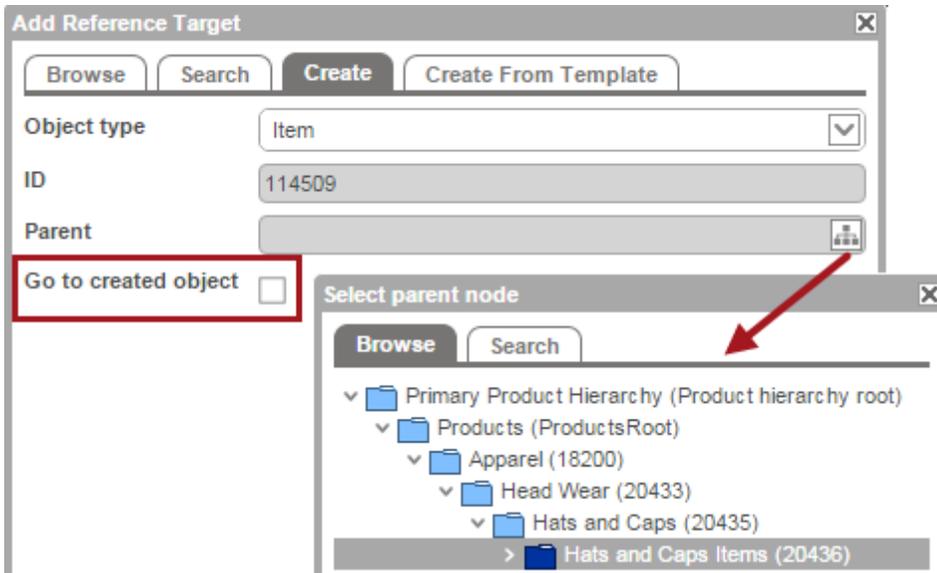
The screenshot shows a configuration window titled 'Properties (edited)' with two tabs: 'Configuration' and 'Web UI style'. The 'Configuration' tab is active, showing a dropdown menu with 'productdetails' selected. Below the dropdown are buttons for 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main section is titled 'Add Reference Action Properties' with a 'go to parent' link. Under 'Component Description', it says 'A toolbar action component for adding references to the selected object.' Below this are two checkboxes: 'Navigate To Created Object' (unchecked) and 'Show Create' (unchecked). At the bottom, there is a 'Parent' label and a dropdown menu with '<Select an option>' selected, followed by an 'Edit...' button.

Follow these configuration steps to display the Create tab when adding references:

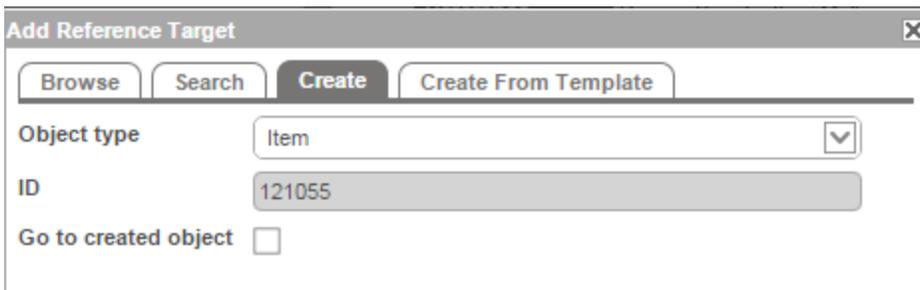
1. Enable **Navigate to Created Object** if the 'Go to created object' option on the Create tab should be enabled by default (shown as disabled in the screenshot in Step 3 below).
2. Enable the **Show Create** parameter.
3. Select a **Parent**, if desired. Choose **Configured Parent Handler** from the dropdown in the value field. In the **Configured Parent Handler Properties** that pops-up, use the ellipsis to the right of the **Parent** value field to browse or search to select a single parent under which all new objects will be created.

When the **Show Create** parameter is selected (checked), users are able to create new objects when building references.

Users must select a valid object type and parent combination, and the object type selection must align with the reference type selected.



If the **Parent** parameter is left unconfigured, end users will have the option to select any valid parent from existing objects. Choosing a **Parent** is useful if the Multi-Reference Editor will only be used to create a single object type which will reside in a flat hierarchy structure. In this case, end users are not presented with a parent selection option.



When creating new objects from the Multi-Reference Editor, the ID field is editable unless the objects being created utilize auto-generated IDs.

## Create From Template

Template objects can be whatever the Web UI designer chooses for them to be. They can be 'live' objects or a set of configured objects that exist only for selection as templates. When a user selects a template object, a new object is created with the same attribute links and values as the selected template object and references it to the selected source. Users then need only to populate the subset of data that differs between the template and the new object.

When creating a new object from a template and following the dialog path of options, users are ultimately presented with a **Pick a Template** option that has three tabs: List, Browse, and Search. In addition to displaying a list of templates (similar to the Browse tab), the List tab is configurable and users can choose to include attributes within the tab view, making it easier to identify the template that best fits the new object.

Properties (edited)

Configuration Web UI style

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

### Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Show Create From Template

Template Root  ... Clear

Parent <Select an option> Edit...

### Child Components

Create From Template List <Select a child component> go to component

Follow these configuration steps to display the Create From Template tab when adding references:

1. Enable the **Show Create From Template** parameter.
2. Select a **Template Root** by clicking the ellipsis to the right of the value field. Any objects under the root are available for selection as a template for new object creation. This creates a new object with the same attribute links and values as the selected template object and references it to the selected source so that users need only to populate the subset of data that differs between the template and the new object. It is a good idea to use a specific, limited set of objects, easily identifiable, as templates for an end user to choose from.

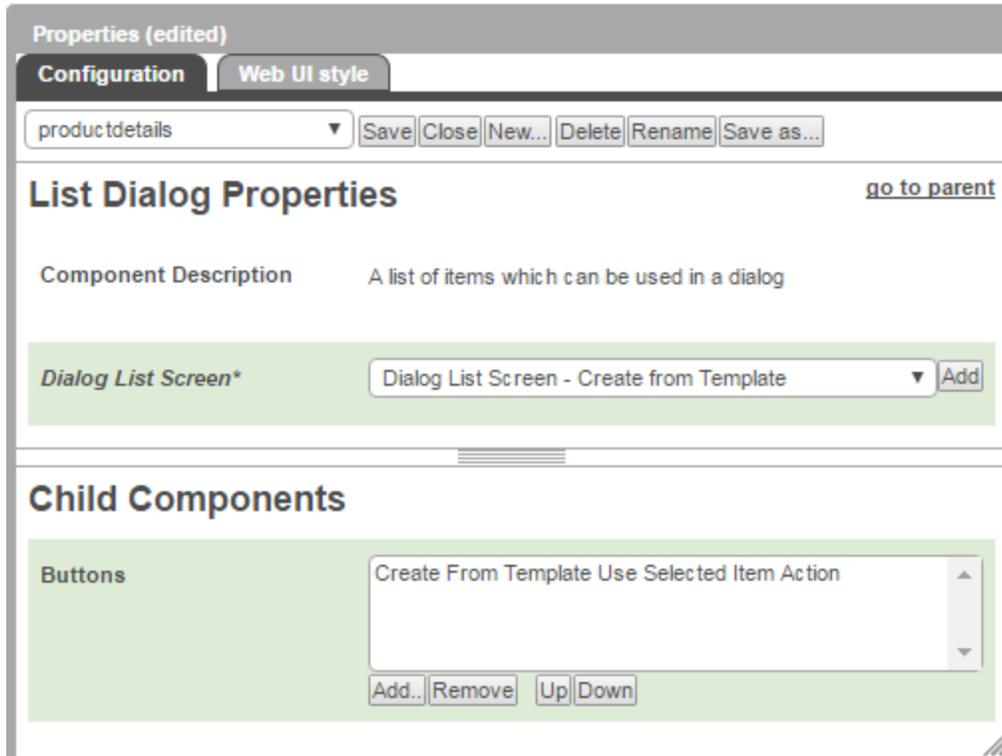
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**Note:** The selected template must be valid for the selected reference type, and only a single Template Root may be selected. It is therefore recommended that a separate area be created for this purpose and that all existing objects that are allowed to be used as templates be linked into that area.

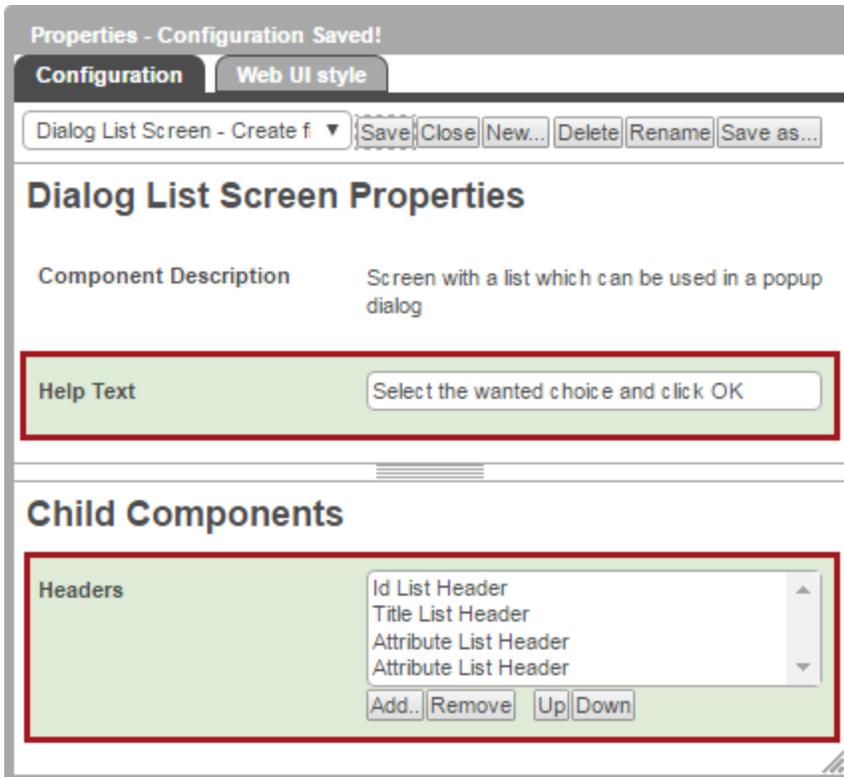
---

3. Select a **Parent**, if desired. Choose **Configured Parent Handler** from the dropdown in the value field. In the **Configured Parent Handler Properties** that pops-up, use the ellipsis to the right of the **Parent** value field to browse or search to select a single parent under which all new objects will be created. If the **Parent** parameter is left unconfigured, end users will have the option to select any valid parent from existing objects.
4. Under **Child Components** > **Create From Template List**, select **List Dialog** from the dropdown menu.
5. When presented with the **List Dialog Properties**, click the **Add** button to the right of the **Dialog List Screen** field.

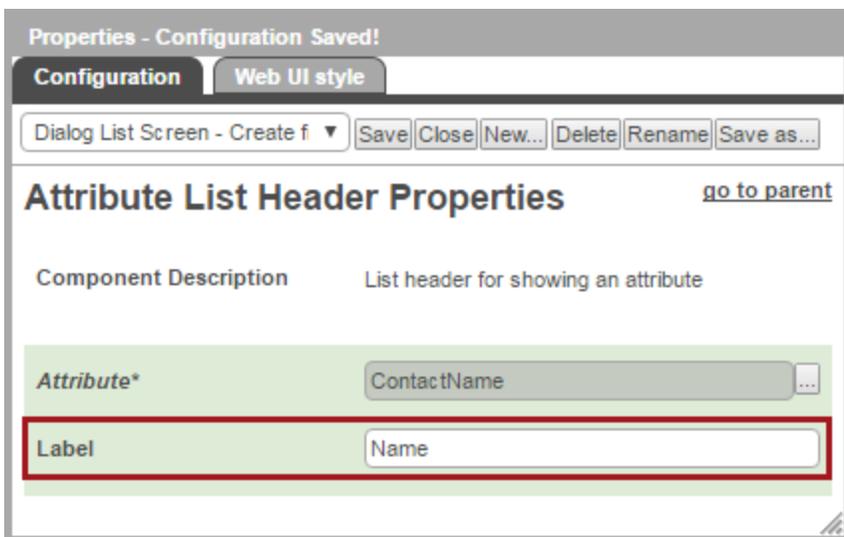
6. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
7. If a **Dialog List Screen** already exists, skip the previous two steps and simply select the screen using the dropdown.
8. Back on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Create From Template Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.



9. Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen - Create from Template.
10. Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Create From Template tab for the results list. The **Help Text** is editable and will display at the top of the template results list. *Please note that reference data cannot be displayed in the Dialog List.*



11. Select the headers for the columns to be displayed to end users. If you are using an Attribute List or Attribute Group List, make sure you fill in the **Label** for the attribute to be displayed in the results list.



12. Click **Save** and **Close** design mode to return to normal Web UI mode.

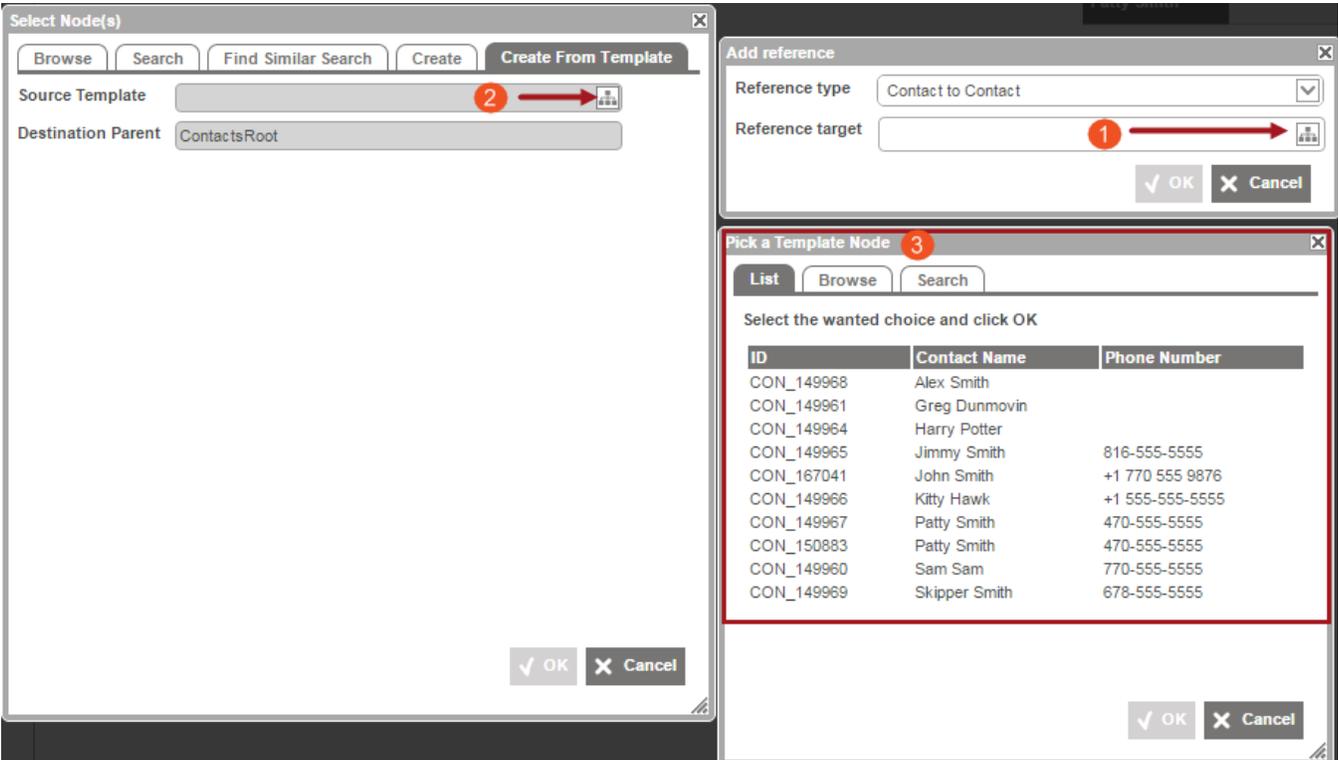
### Create From Template Example

Here is an example of a configured Create From Template tab. While using a Multi-Reference Editor component, the end user clicked 'Add reference' and then clicked the node picker icon on the 'Add reference' dialog that appeared. The Create From Template tab is displayed in the 'Select Node(s)' dialog. By clicking the node picker icon for the Source Template field, the end users gets a Pick a Template Node dialog that displays the List screen based on the headers / attributes configured to display.

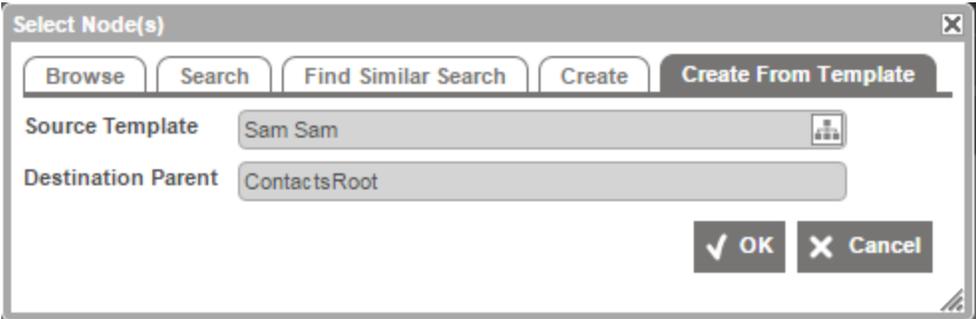


	ID		Contact Name	Object Type	Reference type
Jimmy Smith	<a href="#">CON_149962</a>	⚠	Jimmy Smith	Contact	Contact to Contact
John Smith	<a href="#">CON_107842</a>	⚠	John Smith	Contact	Contact to Contact
Patty Smith	<a href="#">CON_149940</a>	⚠	Patty Smith	Contact	Contact to Contact

The screenshot shows a table with contact information and an 'Add reference' dialog box. The table lists three contacts: Jimmy Smith (ID: CON\_149962), John Smith (ID: CON\_107842), and Patty Smith (ID: CON\_149940). The dialog box has a 'Reference type' dropdown set to 'Contact to Contact' and a 'Reference target' field with a node picker icon. A red box highlights the node picker icon in the toolbar above the table, and a red arrow points from it to the 'Reference target' field in the dialog box.



A maximum of fifty (50) template objects are shown at one time on the results list. The end user selects a single template to use. Once a selection is made, the OK button will be available. The end users clicks OK and continues through the remaining dialog screens. The end result will be a new reference that can be edited (the ID field is editable unless the object being created utilizes an auto-generated ID).





	ID		Contact Name	Object Type	Reference type
Jimmy Smith	<a href="#">CON 149962</a>	⚠	Jimmy Smith	Contact	Contact to Contact
John Smith	<a href="#">CON 107842</a>	⚠	John Smith	Contact	Contact to Contact
Patty Smith	<a href="#">CON 149940</a>	⚠	Patty Smith	Contact	Contact to Contact
Sam Sam	<a href="#">CON 168109</a>		Sam Sam	Contact	Contact to Contact

## Considerations and Limitations

- Create From Template functionality is available for Product and Entity object types only.
- Care must be taken in the configuration of the Add Reference Action component (and in particular of the Create From Template option) to ensure that end users are provided with valid selection options. The selections for object type of the template (if used), object type of the object being created, parent, and reference type must all align to yield valid results based on the data model and configurations.

## Find Similar Search

To help prevent users from creating duplicate objects in the STEP system, users can now use Find Similar functionality to search for and identify similar objects prior to adding references and creating target objects within a Multi-Reference Editor. When using the Add References Action, the Find Similar functionality can be configured to display on a new Find Similar Search tab. Attribute values of both direct objects and target objects (based on a specific reference type) can be configured as searchable fields. If similar objects are found, a configurable results list will display attribute values for the direct objects. This allows users to compare the results to determine if they can use an existing object.

The key to Find Similar functionality is the **matching setup** that the customer creates and uses for duplicate handling. Every time a user enters data into the search fields and clicks OK, the Find Similar search checks the match code values involved, executes the relevant matching algorithm, and provides a set of results, if any are found. If a user is not getting the results set they expect, then the first place to check is the algorithm configured in the Duplicate Handler parameter in the Add Reference Action Properties. Two bind types work with the Find Similar functionality. They are: **First Match Object** and **Second Match Object**. A relevant Match Code and Matching Algorithm needs to be set up before attempting to use the Find Similar Search tab. For more information about setting up and using matching algorithms, see the **Configuring Matching Algorithms Overview** section of the **Matching and Linking** documentation.

Find Similar functionality is also available using a Find Similar Action Button on an Initiate Item screen type. This functionality is explained in the **Find Similar** section of the **Web User Interfaces / Using a Web UI** documentation.

Properties (edited)

Configuration Web UI style

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

### Add Reference Action Properties [go to parent](#)

Component Description A toolbar action component for adding references to the selected object.

Duplicate Handler <Select an option> Edit...

Find Similar Search Fields

Add... Edit... Remove Up Down

Show Find Similar Tab

Temp Object Type For Find Similar ... Clear

Temp Parent For Find Similar ... Clear

---

### Child Components

Find Similar List Dialog <Select a child component> [go to component](#)

To configure the Find Similar Search tab:

1. Select **Duplicate Handler** in the dropdown for the **Duplicate Handler** parameter.
2. The **Duplicate Handler Properties** screen will display. The only required setting is the **Matching Algorithm** parameter. Click the ellipsis to the right of the value field and select a matching algorithm. Click **Save**.

**Edit component** [X]

### Duplicate Handler Properties

**Component Description** This parameter component can be used to configure a Duplicate Handler for the Initiate Item component. It cannot be used as a stand-alone component.

**Detail Screen\*** homepage [v] Add

**Editor Screen\*** homepage [v] Add

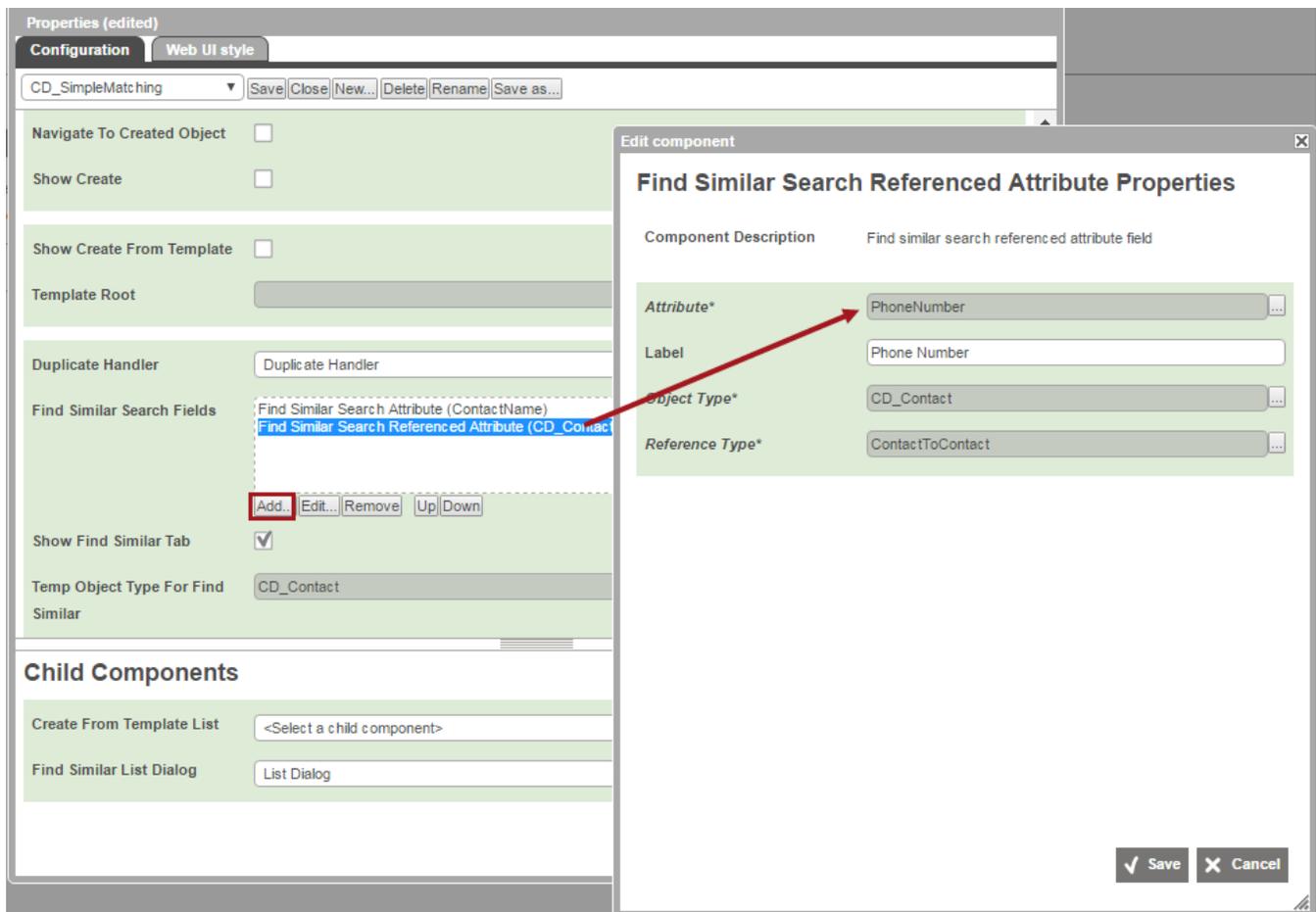
**Matching Algorithm\*** FindSimilarMatchingAlgorithm [v] ...

**Threshold** 80

**Window Size** 10

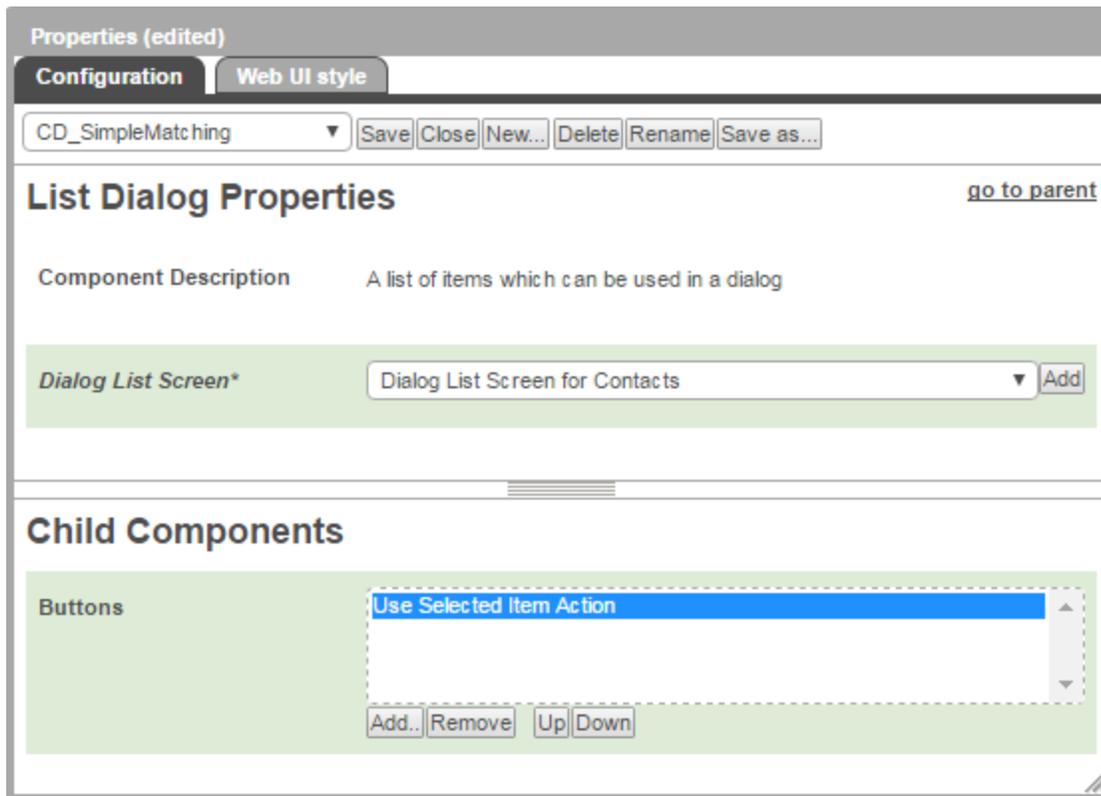
[v] Save [X] Cancel

3. Back on **Add Reference Action Properties**, click **Add** under the **Find Similar Search Fields** value box. Add, remove, and re-order **Attribute** and **Referenced Attributes** as desired. Remember that these search fields will need to be incorporated into the matching algorithm configured in the Duplicate Handler parameter.
4. It is important to fill in the **Label** fields during the **Find Similar Search Fields** configuration. These labels will appear on the Find Similar Search tab. If adding a **Find Similar Search Referenced Attribute**, fill in the **Attribute**, **Label**, **Object Type**, and **Reference Type** values. Save all changes.



5. Enable the **Show Find Similar Tab** setting back on the **Add Reference Action Properties**.
6. Using the ellipsis buttons, make a selection for the **Temp Object Type For Find Similar** parameter and the **Temp Parent For Find Similar** parameter. (When the matching algorithm is run, it creates temporary objects based on the input in the search fields. These objects are then used in the algorithm to compare and find similar objects. The temporary objects need a parent and object type to be created. After the user finishes the operation, the temporary objects are deleted by the system. These parameters have to be configured for the functionality to work. The object types of both the direct objects and the referenced objects need to be made valid under the location used for the Temp Parent For Find Similar parameter.)
7. Under **Child Components > Find Similar List Dialog**, select **List Dialog** from the dropdown menu.
8. On **List Dialog Properties**, click **Add** to the right of the Dialog List Screen value field.
9. Create a new screen by selecting **Dialog List Screen** from the list of available screen types / components. Enter an easily identifiable Screen ID, click **Add**. The screen ID will automatically populate in the Dialog List Screen value field.
10. If a **Dialog List Screen** already exists, skip the previous two steps and on the **List Dialog Properties**, simply select the **Dialog List Screen** using the dropdown.

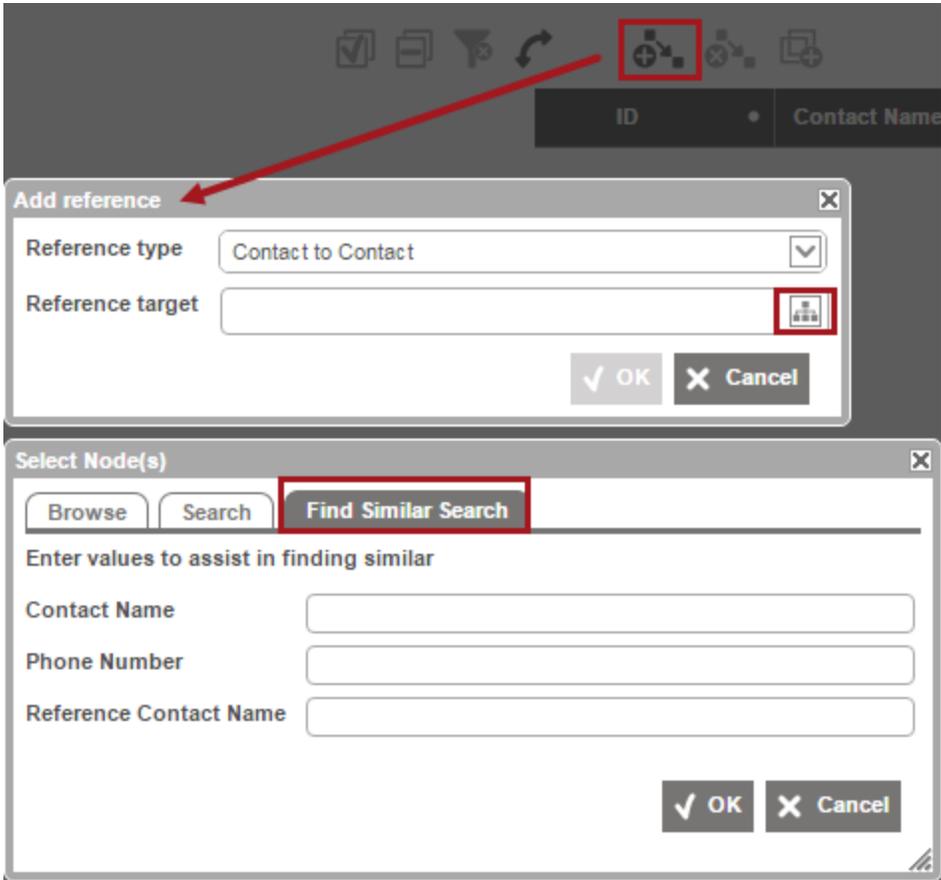
- Also on the **List Dialog Properties** screen, in the **Child Components > Buttons** field, click **Add** and select **Use Selected Item Action**. Click **Add**, and then click **Save** in the Designer window.

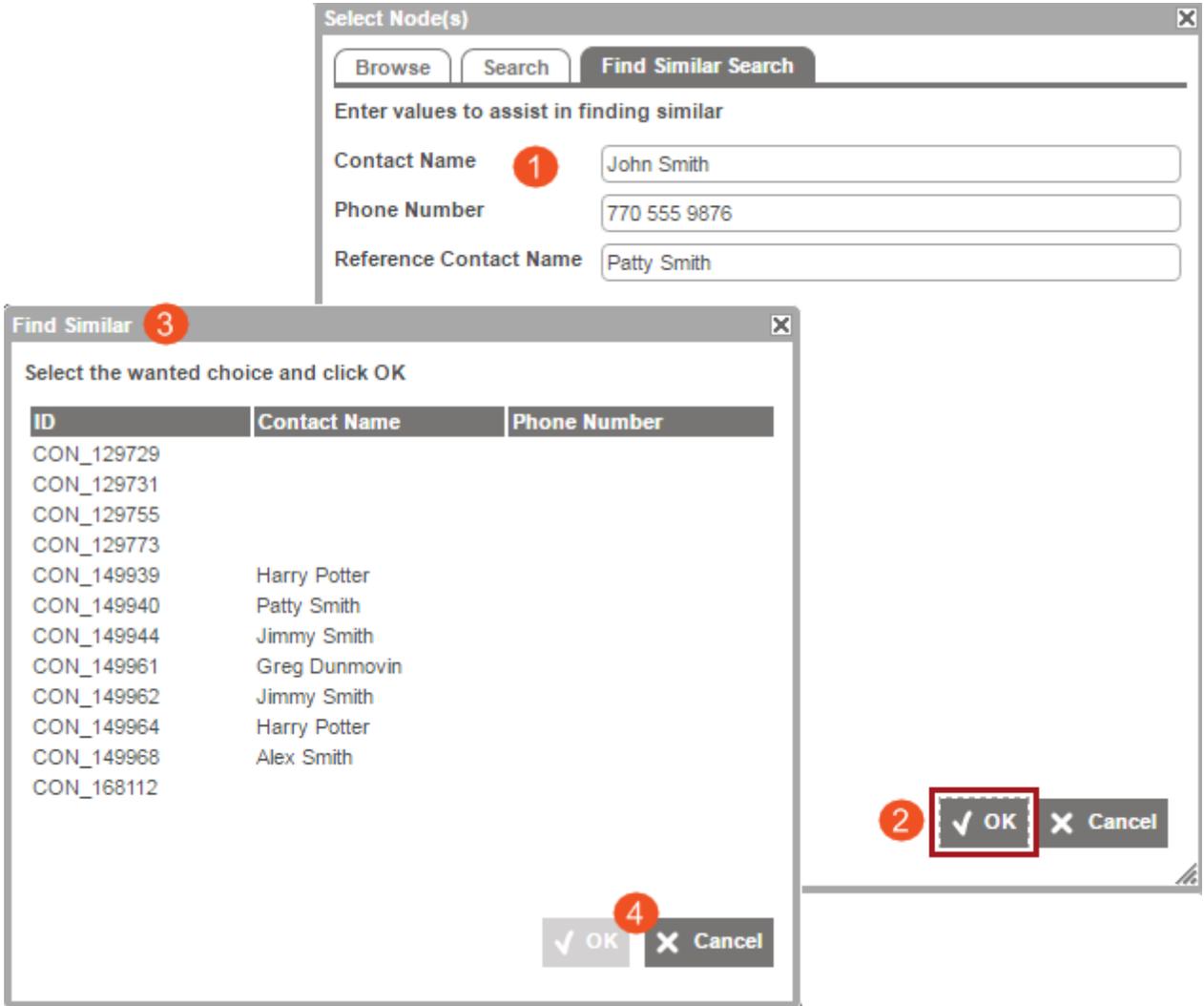


- Before exiting design mode, select the Dialog List Screen ID of the screen you just created from the dropdown menu. In the example above, the screen ID is Dialog List Screen for Contacts.
- Configure the **Child Components > Headers** section of the **Dialog List Screen Properties**. Click **Add** under the value field to set up the attributes that will display in the Find Similar Search tab for the results list. The **Help Text** is editable and will display at the top of the template results list. *Please note that reference data cannot be displayed in the Dialog List.*
- Click **Save** and **Close** design mode to return to normal Web UI mode.

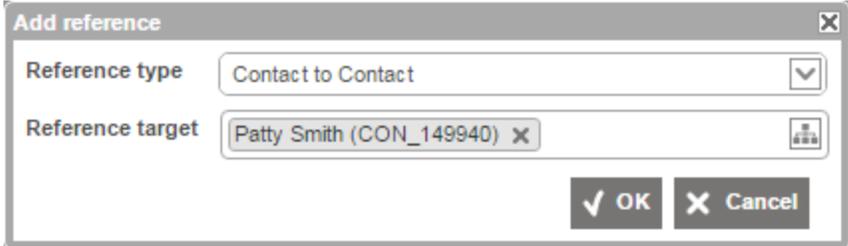
## Find Similar Search Example

Here is an example of a configured **Find Similar Search** tab. While using a **Multi-Reference Editor** component, the end user clicked 'Add reference' and then clicked the node picker icon on the 'Add reference' dialog that appeared. The **Find Similar Search** tab is displayed in the 'Select Node(s)' dialog. The end user enters data into the configured attribute fields and clicks OK. The algorithm runs in the background and the configured Dialog List Screen displays. Remember that this is not a standard search and results are based on the matching algorithm running in the background.





A maximum of fifty (50) objects are shown at one time on the results list. If the end user finds a reference on the results list that they want to use, they click in the row they want. When that selection is made, the OK button will be available. The end users clicks OK and now that reference is saved. If the user does not find a result to use, they can click cancel and create a new reference using the Create or Create From Template functions (both described previously in this topic).



**Success**  
1 reference was created!

English US Main

Revisions Data Visualization



	ID	Contact Name	Object Type	Reference type
Patty Smith	<a href="#">CON_149940</a>	Patty Smith	Contact	Contact to Contact

For additional information about the Multi-Reference Editor and its features, see the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

# Multi Revision Screen

The Multi Revision Screen is a screen designed to show revision information on the attribute values and outbound references of an object. This screen and its child component, the Multi Revision Editor table, need to be configured to display the desired attributes and references to compare. Other configurable display settings include data filtering options that can be used to hide equal values and highlight differences. This can be especially useful to quickly evaluate an object for approval, for example.

Careful consideration should be taken when using the Multi Revision Screen. If objects contain a large number of attributes, users may experience system slowness as they work in Web UI.

## Prerequisites

It is expected that anyone configuring the Multi Revision Screen component is familiar with the Web UI Designer as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

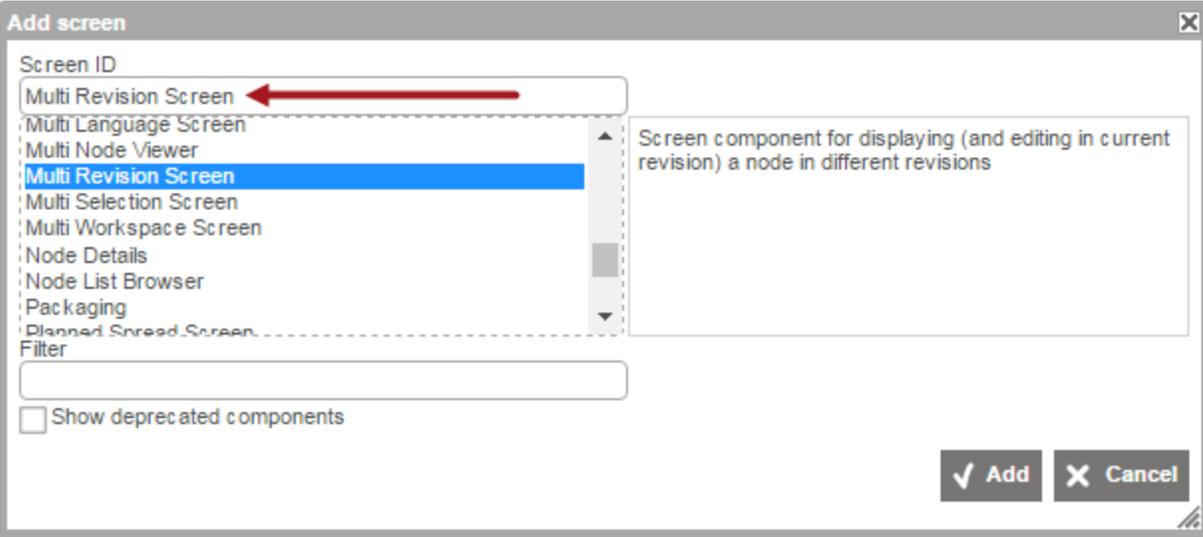
## Adding a New Multi Revision Screen

Steps for creating a new Multi Revision Screen are below.

- 1. Click the **New** button in the designer to create a new screen.



- 2. Choose **Multi Revision Screen** from the screen list and type in a Screen ID.



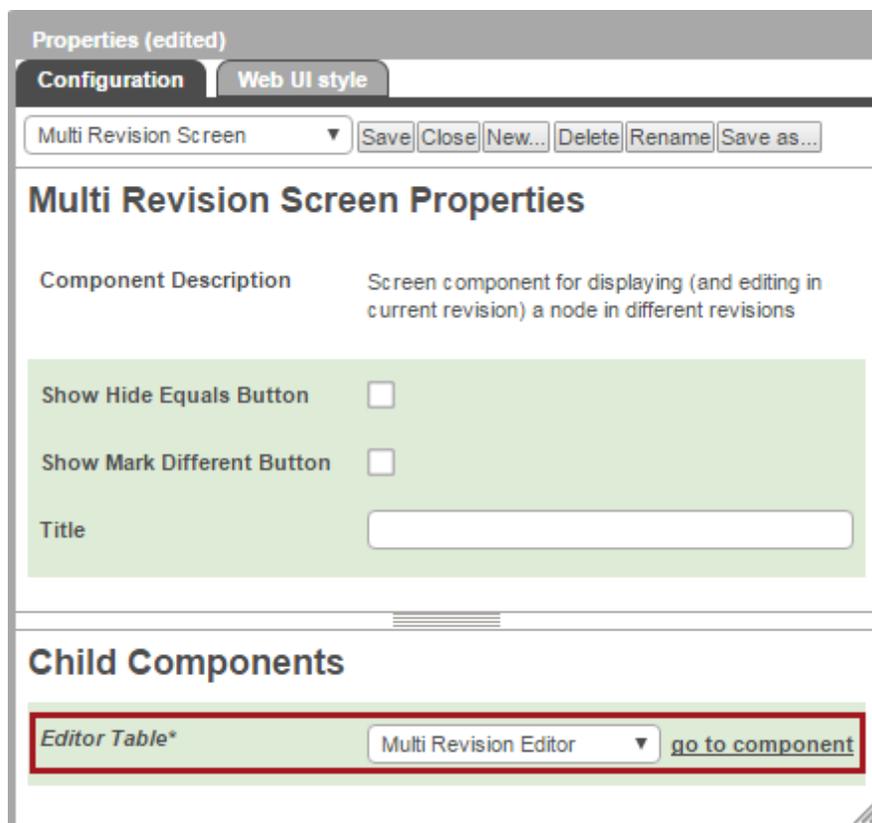
## Configuring a Multi Revision Screen

Steps for configuring the Multi Revision Screen Properties are below.

1. With the Designer window open, select the **Multi Revision Screen** using the screen dropdown list.
2. In Multi Revision Screen Properties, determine if you want to enable the Show Hide Equals Button and/or the Show Mark Different Button parameters. Details regarding what these parameters do can be found in the **Comparing Data Using Hide Equal and Mark Different** section of the **Web User Interfaces / Using a Web UI** documentation.
3. Type in a title for the screen, if desired. This title will display on the screen in the top left corner.

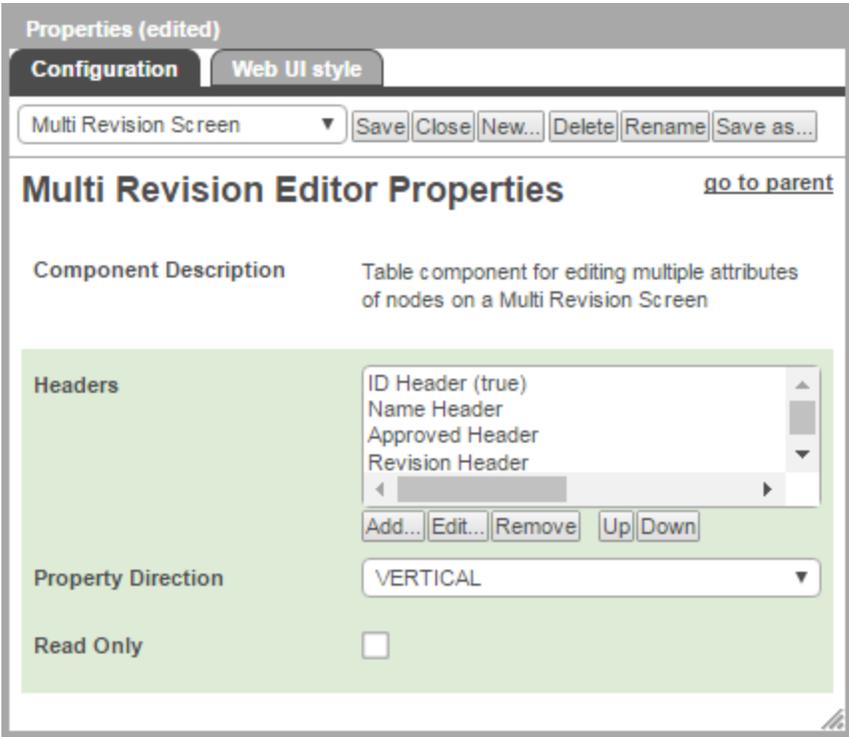


4. Go to the Child Components > Editor Table parameter and select **go to component**. Please note that Multi Revision Editor is pre-populated in the value dropdown since it is mandatory to configure the editor before the Multi Revision Screen will render correctly.

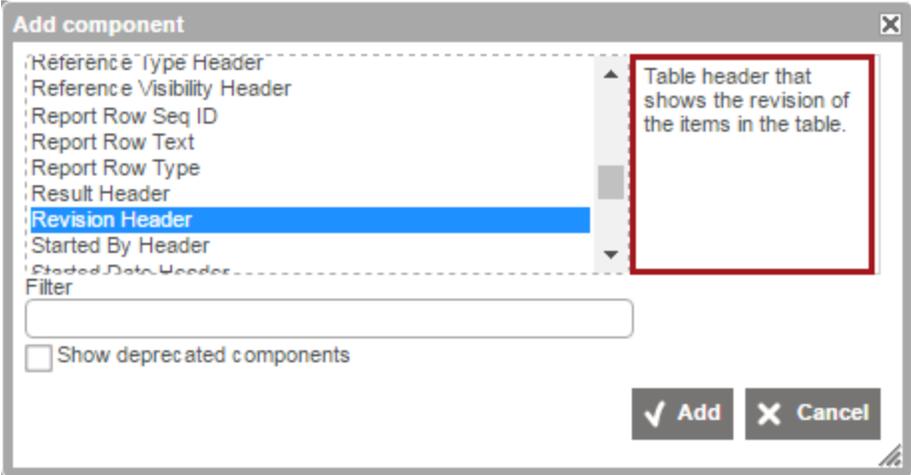


## Configuring the Multi Revision Editor

The **Multi Revision Editor Properties** now need to be configured.



- 1. Add, edit, remove, and reorganize table headers, as desired, in the **Headers** value field. The image above shows headers that have already been added. Relevant headers to consider including, as needed, are: ID Header, Name Header, Attribute Value Header, Attribute Value Group Header, Approved Header, Revision Header, Path Header, Reference Header, and Translation Header. Clicking on each component in the 'Add component' dialog provides a description of the component on the screen.



- 2. Determine the direction of the table using the **Property Direction** parameter. VERTICAL means that the data (determined by the headers selected) will appear in rows and the column headers will be the revision numbers. An example of this layout is shown at the end of this topic.

ID
Name
Approval
Revision
Path
Translation
Brand Name

HORIZONTAL means that data will appear in columns, while the revisions numbers are listed as the row headers.

ID	Name	Approval	Revision	Path	Translation	Brand Name
----	------	----------	----------	------	-------------	------------

- 3. **Read Only** should be selected if you want to restrict end users from editing the current version of data displayed in the table. If Read Only is disabled (unchecked), then the current revision of data can be edited, as applicable to the selected object.
- 4. Display additional optional parameter settings by clicking the arrowhead next to the **Group Options** heading and/or the **Advanced** heading. Make selections as desired. Each parameter features help text, accessible by clicking the yellow info icon to the right of each parameter name.

Properties

Configuration Web UI style

Multi Revision Screen Save Close New... Delete Rename Save as...

### Multi Revision Editor Properties [go to parent](#)

▼ Group Options

Groups Initially Open ⓘ  ←

Show Empty Group Headers

Show Group Headers

▼ Advanced

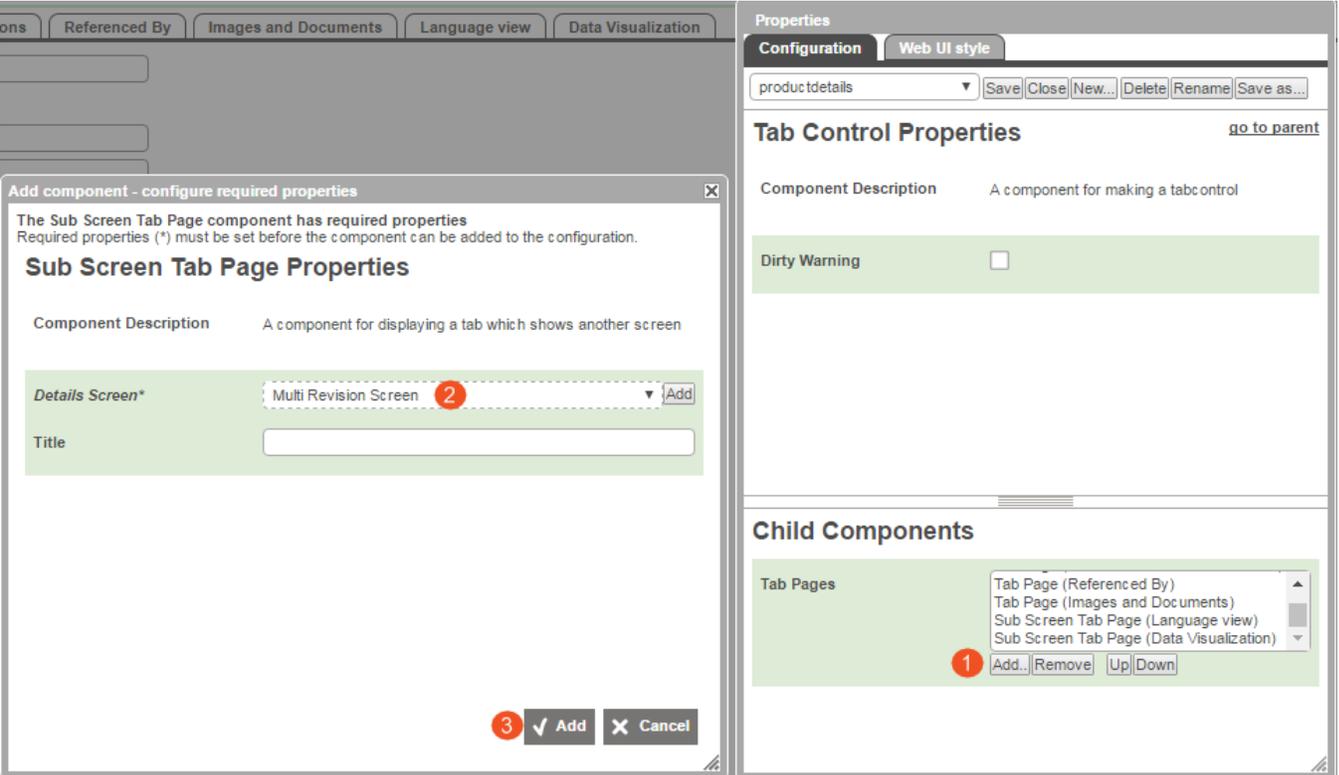
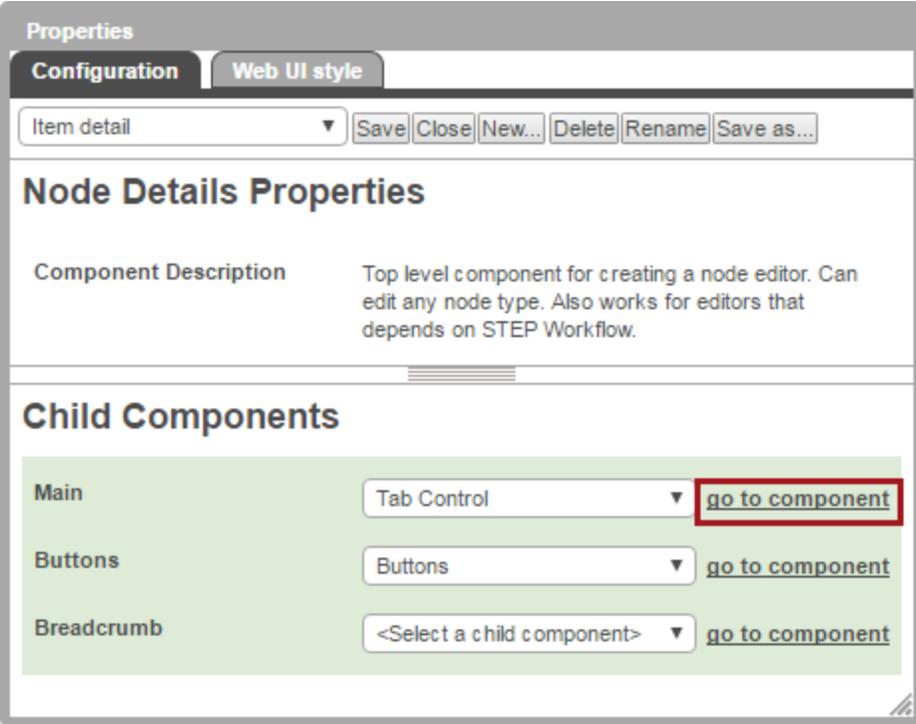
Dimensions <Select an option> Edit...

Display Mode Height 200

Show Details

Show Only Valid Attributes

5. **Save** all selections and **Close** the Designer.
6. As with any screen, it must be mapped appropriately in Main Properties > Mappings for end users to be able to access it. As an alternative to mapping, the Multi Revision Screen can be added as a Sub Screen Tab Page on a Node Details screen.



Here is an example of a Multi Revision Screen configured to display as a Sub Screen Tab Page on a Node Details screen.

Product Details

Primary Product Hierarchy > Products > Automotive > Parts & Accessories > Tire Care > Tire Care Items > L23-RP4100

- Product attributes
- References and Classifications
- Referenced By
- Images and Documents
- Language view
- Data Visualization
- Revisions

ID 22624  

Name L23-RP4100

	0.11 (CURRENT)	0.10	0.9	0.8	0.7	0.6	0.5	0.4
ID	22624	22624	22624	22624	22624	22624	22624	22624
Name	L23-RP4100	L23-RP4100	L23-RP4100	L23-RP4100	L23-RP4100	L23-RP4100	L23-RP4100	L23-RP4100
Approval	 Last Approved on Fri Oct 16	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Revision	0.11 Last edited by USER2 on Wed Mar	0.10 Last edited by USER on Mon Feb	0.9 Last edited by USER on Fri Feb 26	0.8 Last edited by USER on Tue Feb	0.7 Last edited by USER on Fri Jan 22	0.6 Last edited by USER on Mon Nov	0.5 Last edited by USER on Fri Oct 16	0.4 Last edited by USER on Fri Oct 09
Path	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/	Primary Product Hierarchy/Products/
Translation	Not Translated	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Brand Name	Tires-R-Us	Unbranded	Unbranded	Unbranded	Unbranded	Unbranded	Unbranded	Unbranded

- Show Hide Equals Button is enabled (checked)
- Show Mark Different Button is enabled
- Title value is blank
- Headers: ID, Name, Approval, Revision, Path, Translation, Attribute Value (Brand)
- Property Direction is VERTICAL
- Read Only is disabled (unchecked)

## Multi-Select from the Tree Navigator

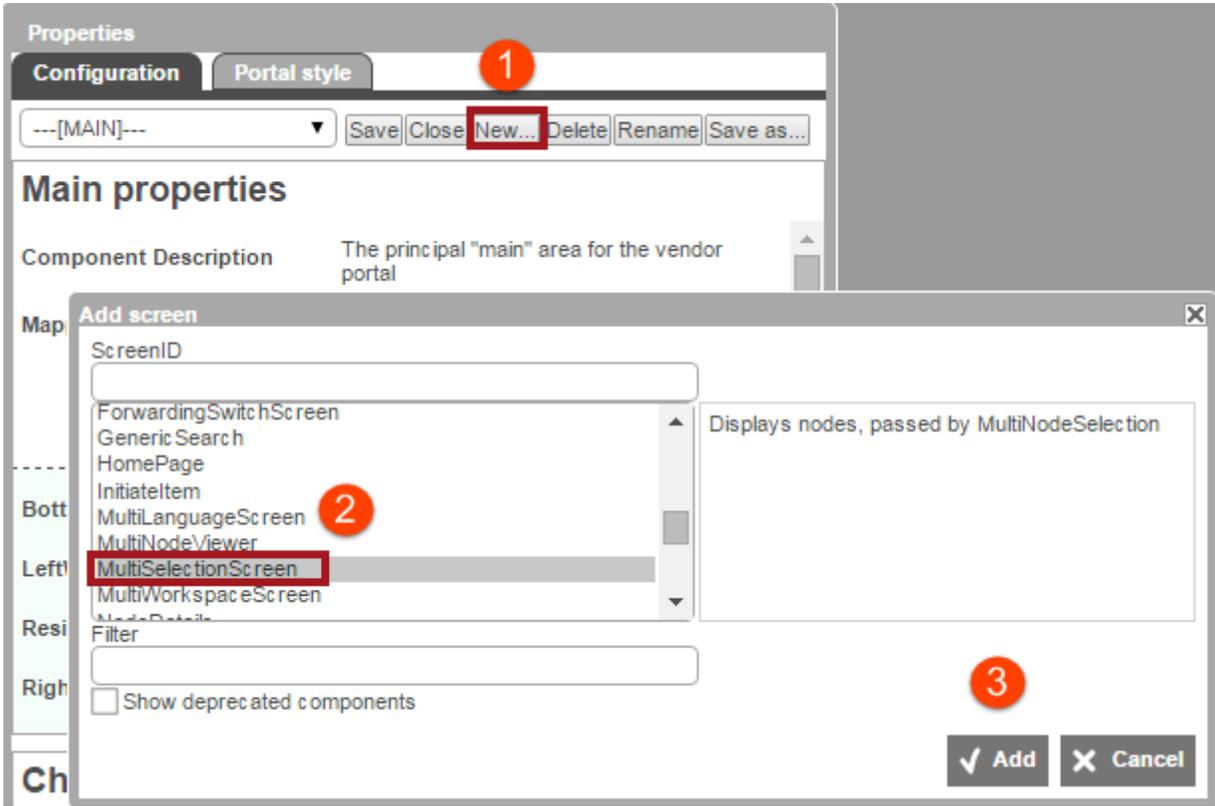
Users browsing through data using the Tree navigator sometimes want to focus in on a small subset of the data in order to perform the same action to all of the selected objects. A new mapping condition (MultiNodeSelectionCondition) is now available that allows for multi-view and/or multi-editing. When multiple objects are selected from the Tree, the appropriate list view will be shown to the user, as defined by the configuration of the Web UI (Portal) screen.



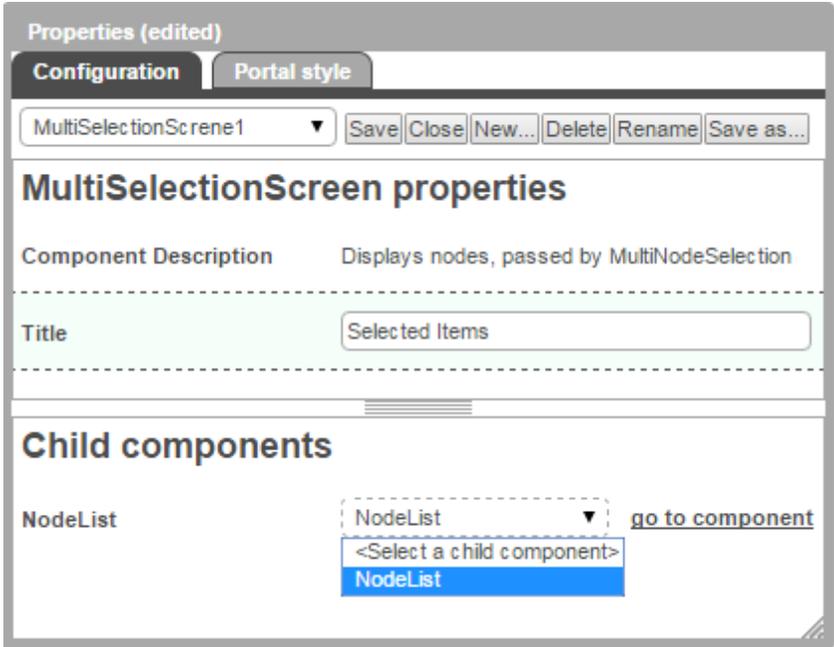
### Setting up the Multi-Select from Tree Navigator

To set up the Multi-Select from Tree Navigator function a new screen of the type MultiSelectionScreen must be configured.

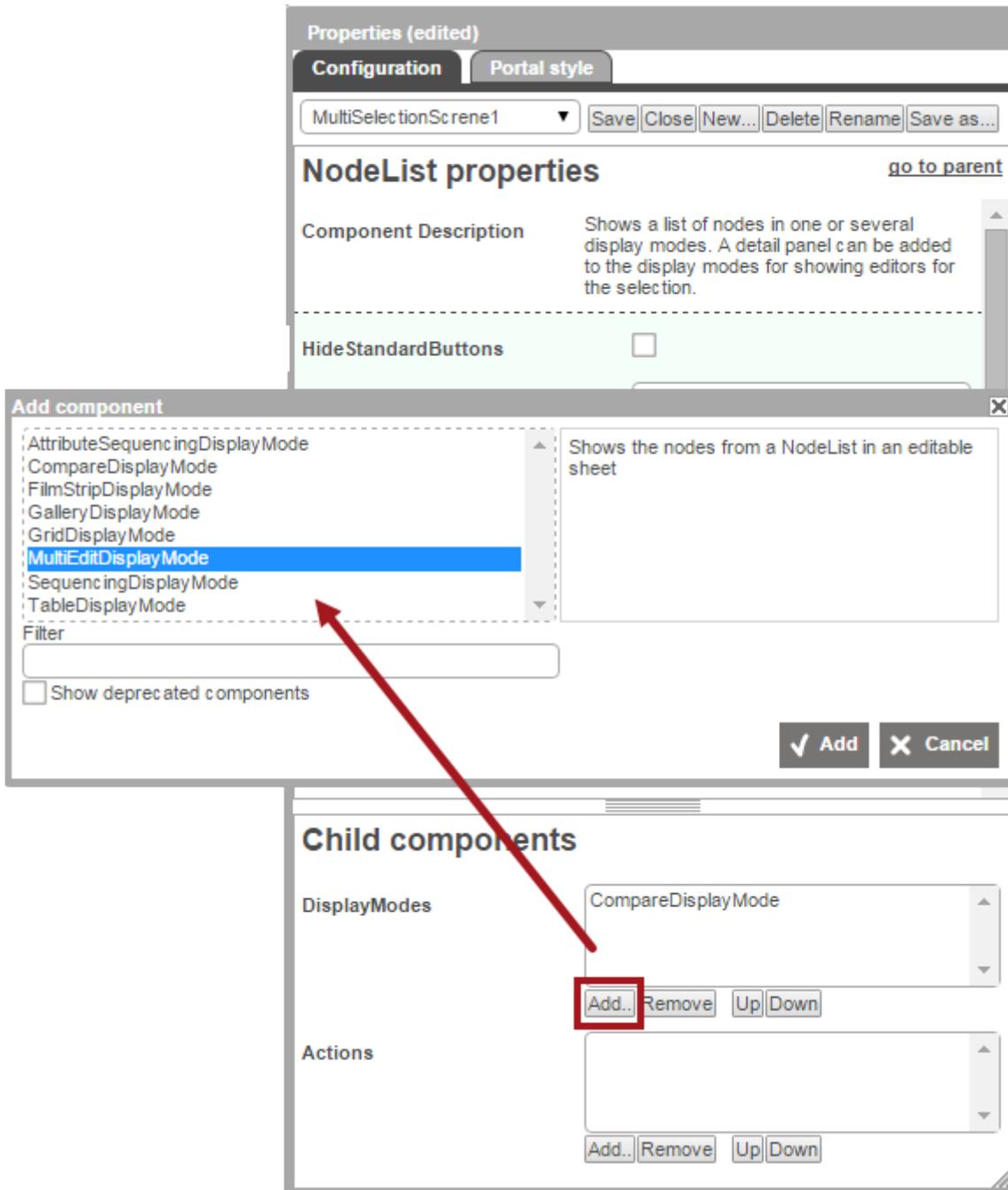
1. This screen is added by selecting "New" in the Portal Designer and then scroll down the list to find the MultiSelectionScreen.



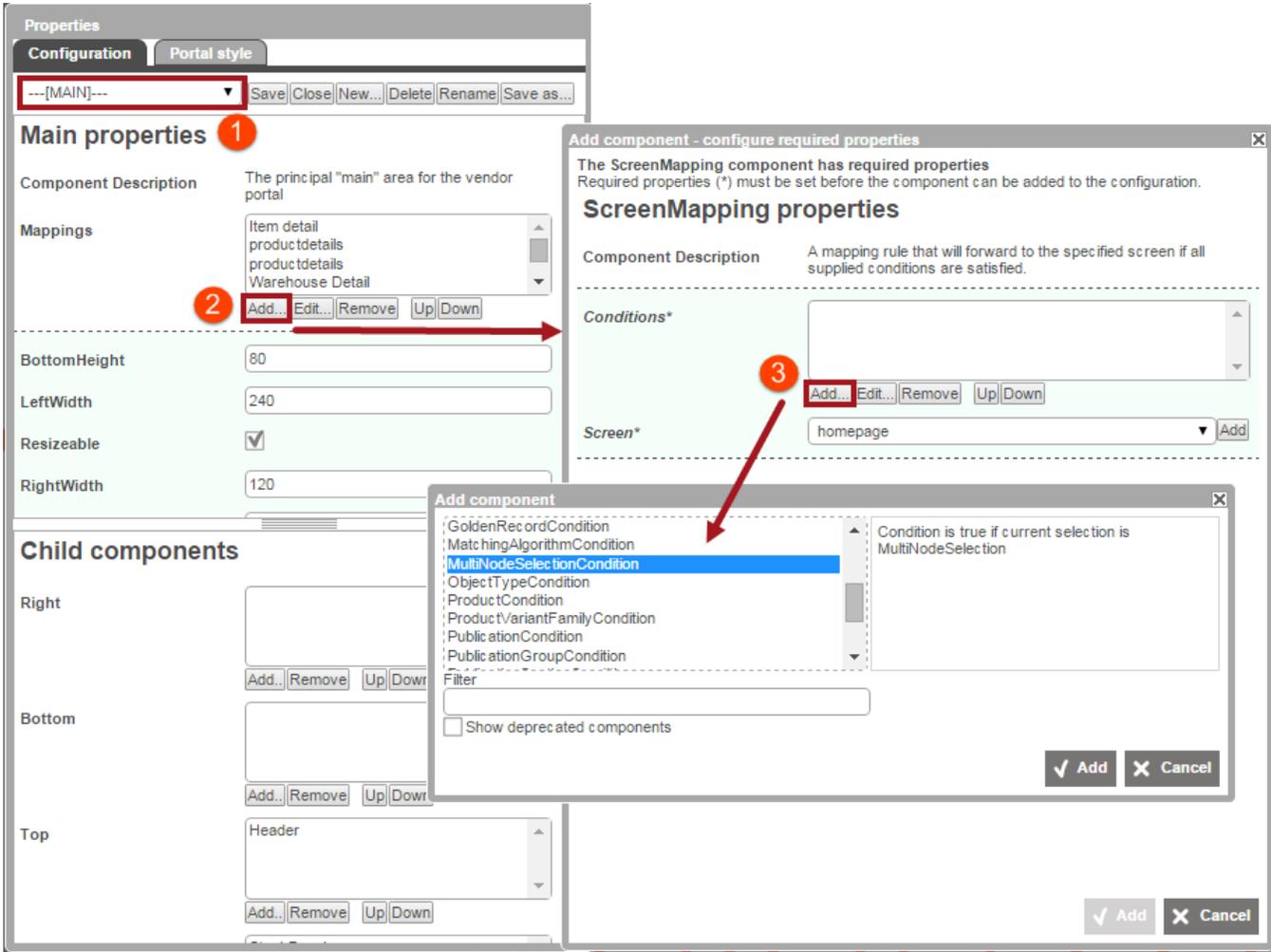
2. Next configure the screen with a NodeList (child component) and set it up with the desired Display Modes.



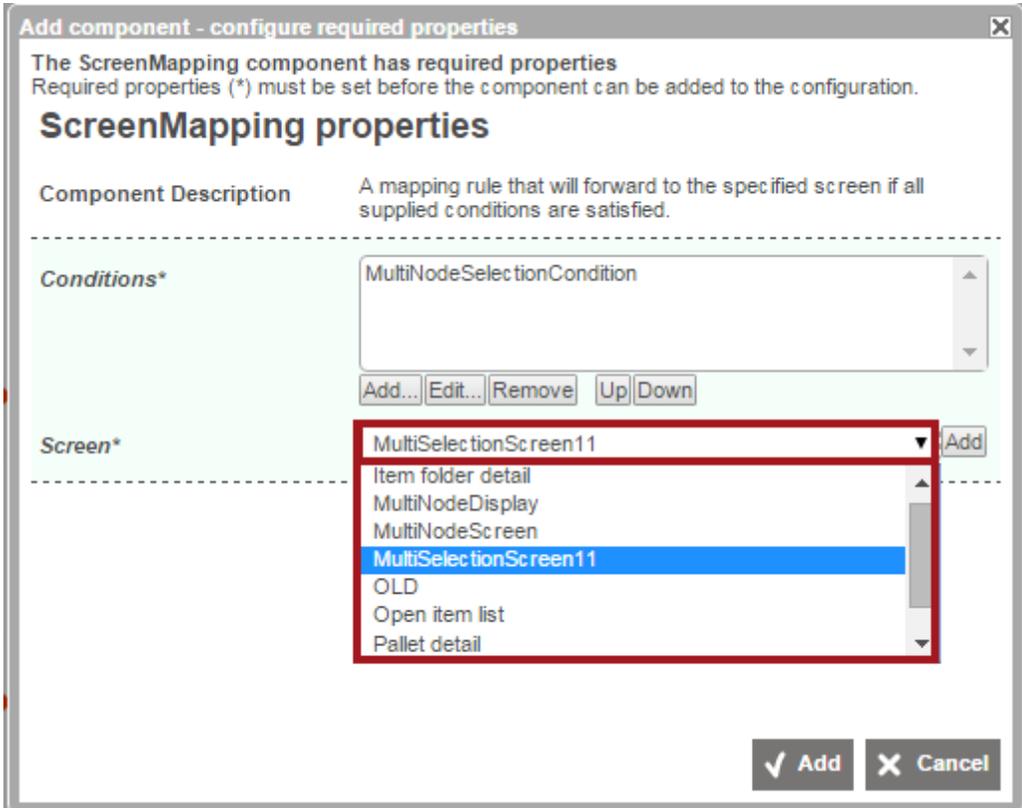
3. If the purpose is to edit the objects selected in the Tree navigator, then be sure to select the Multi-Edit display. When your components are added, press save.



4. After configuring the screen, go to "MAIN" in the Portal Designer. Under Mappings click "Add" to open the Screen Mappings dialog. Click "Add" under Conditions and find the MultiNodeSelectionCondition in the list. Click "Add" to select the mapping condition and thereby add it to the list of Conditions.



5. Now the mapping condition must be paired with a screen. Select the MultiSelectionScreen that was configured for the purpose of showing multiple objects. The selected screen is the screen that the condition will forward to when the condition is triggered as the user navigates the Web UI (Portal). Press save again.



**Note:** A dedicated screen (MultiSelectionScreen) must be configured to display the multiple objects selected from the tree navigator.

## Node Details Component

The Node Details screen type / component is a top-level component. It is used as a 'base' and configured to display other components (e.g., Node Editor, Multi-Reference Editor).

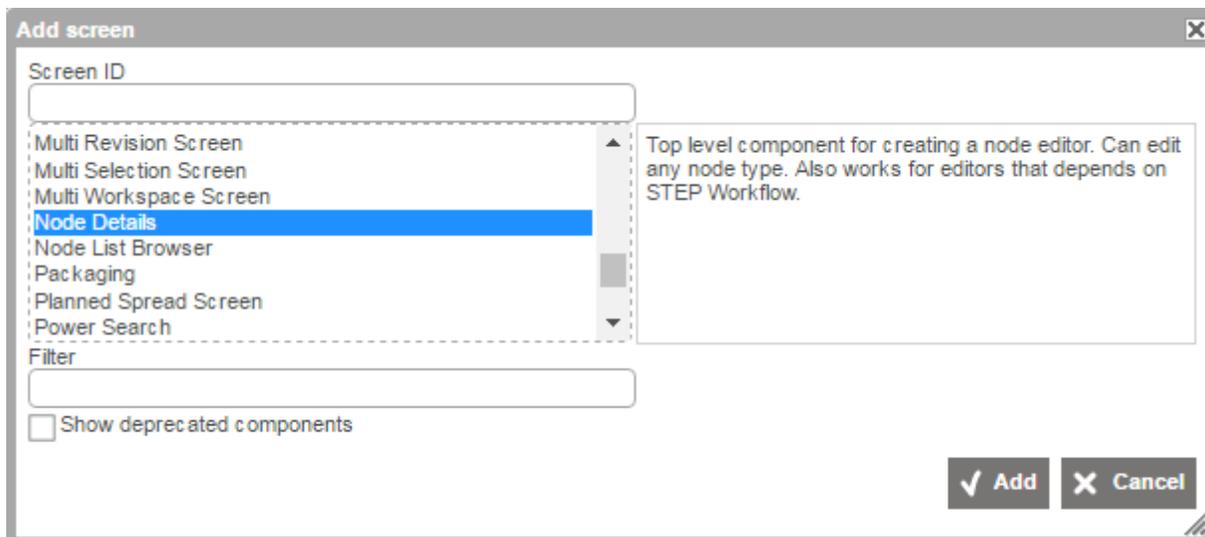
### Prerequisites

It is expected that anyone configuring the Node Details component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

### Adding a New Node Details Screen

Steps for creating a new screen using the Node Details component are below.

1. In the designer window, click the **New** button in the action icon row.
2. Choose **Node Details** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable when it is time to configure the screen and/or set up screen mapping.



3. Click **Add**.
4. Click **Save** in the designer window. At this point, either close the designer and configure the screen at a later time, or continue on with the **Node Details** configuration.

### Configuring Node Details Properties

Each parameter should be configured as needed. To guide you in your setup, help text is available for each parameter and is accessible by clicking a yellow info icon to the right of each parameter name (displays upon mouse over).

Properties

Configuration Web UI style

Node Details Save Close New... Delete Rename Save as...

### Node Details Properties

Component Description Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.

Title

Css Class

▼ Validation

Business Conditions

Add... Edit... Remove Up Down

Post Save Validation Script

▼ Multiple Target References

Show Warning

---

### Child Components

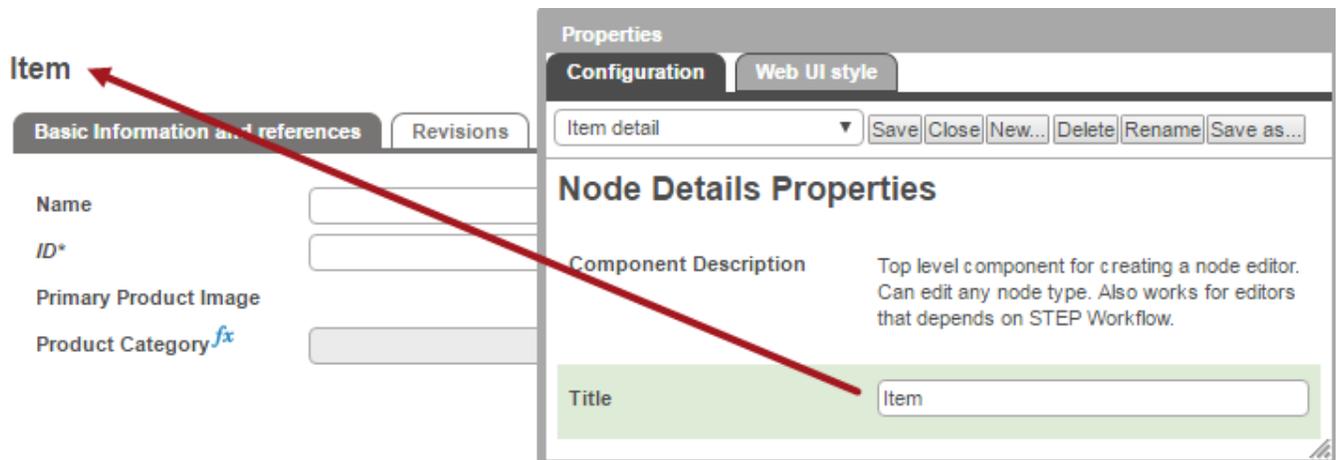
Main  [go to component](#)

Buttons  [go to component](#)

Breadcrumb  [go to component](#)

### Main Components

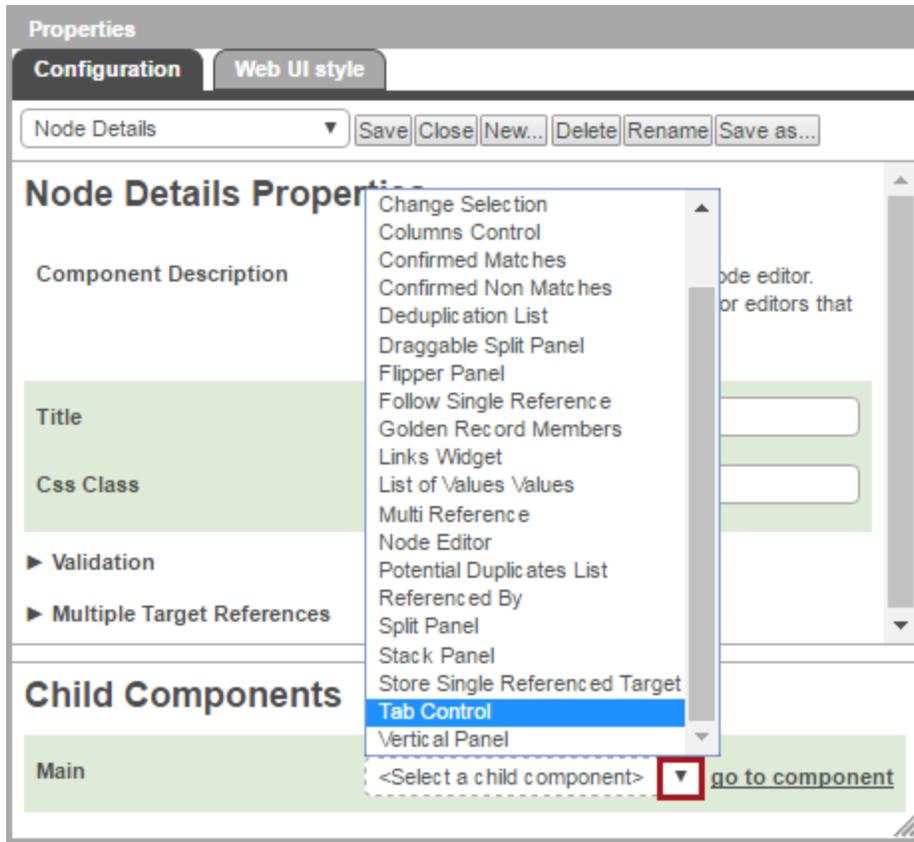
1. In the **Title** field, enter a descriptive title that will display on the screen. In the example below, the Node Details component has an 'Item detail' screen ID and an 'Item' title so users will know that they are working with an Item object type.



2. Click on **Validation** to expand the following optional parameters.
  - **Business Conditions:** Click **Add...** to select an existing business condition to be executed to validate attribute values on the node being edited. Multiple business conditions can be added, but all must succeed for the process to continue. For more information about Business Conditions, see **Overview of Business Conditions** in the **Business Rules** documentation.
  - **Post Save Validation Script:** Enter a JavaScript expression for performing a post-save validation of a node.
3. Click on **Multiple Target References** to display the **Show Warning** parameter (disabled by default). When Show Warning is enabled / checked, a warning will display to end users when a shared object is edited and then saved, either through an actual Save action or implied save (e.g., Submit Action or Approve Action). For more details, see the **Shared Data Handling** section of the **Web User Interfaces / Using a Web UI** documentation.

## Child Components

1. From the dropdown menu for the **Main** parameter, choose a component. For example, you can add a Node Editor. Or, add a Tab Control component and configure different components and/or screens to display on different tabs all on a single Node Details screen. Additional configuration will be required depending on the selected component.



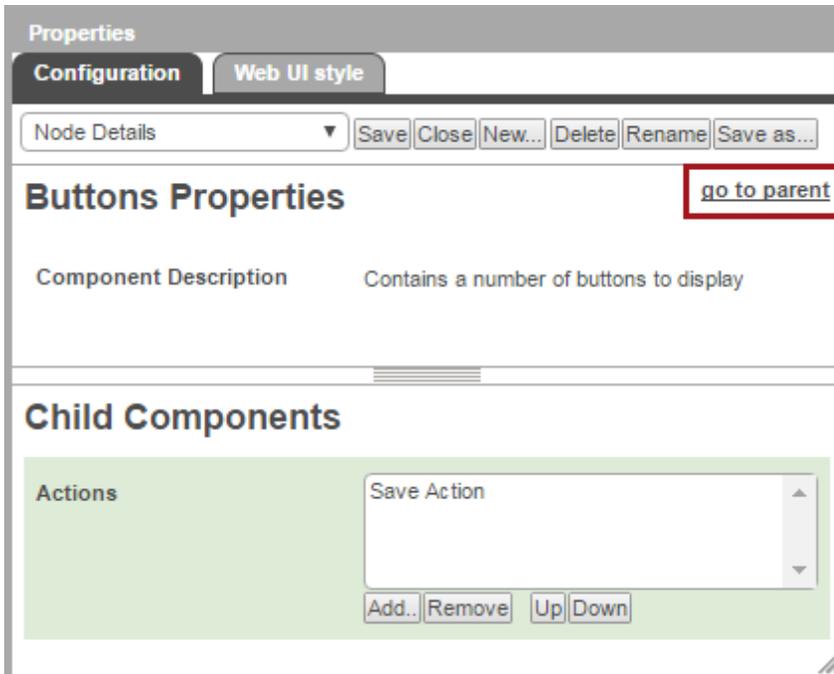
2. Select **Buttons** from the Buttons parameter dropdown, then click **go to component**.
3. On **Buttons Properties**, click the Add button below the **Actions** field, then select a component from the 'Add component' list and click **Add**. Additional configuration may be required depending on which action is selected.

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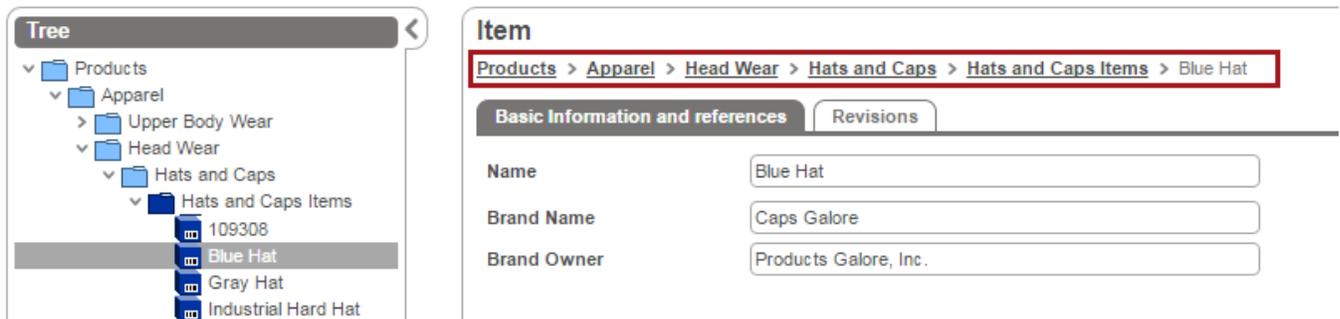
**Important:** An example is the **Save Action** button—if you are placing a Node Editor on a Node Details screen, a Save button must be configured so that when object data is edited, it can be saved before the user navigates to another screen.

---

4. Repeat the previous step as needed to add additional actions. The action buttons will display in the order they are listed in the Actions value field. Re-organize by using the Up and Down buttons.
5. When all actions are added, click **go to parent** to navigate back to Node Details Properties.



6. If desired, set up the Breadcrumb parameter by selecting **Breadcrumb** from the dropdown. Click **go to component**.
7. In Breadcrumb Properties, at a minimum, the **Root Object Type** must be selected. Click the ellipsis button, make a selection, and then click OK. Once configured, a breadcrumb showing the hierarchy from the current node and up to the nearest node of the specified root type will be displayed. Each breadcrumb node is clickable unless the **Readonly** parameter (the checkbox directly above Root Object Type) is selected.



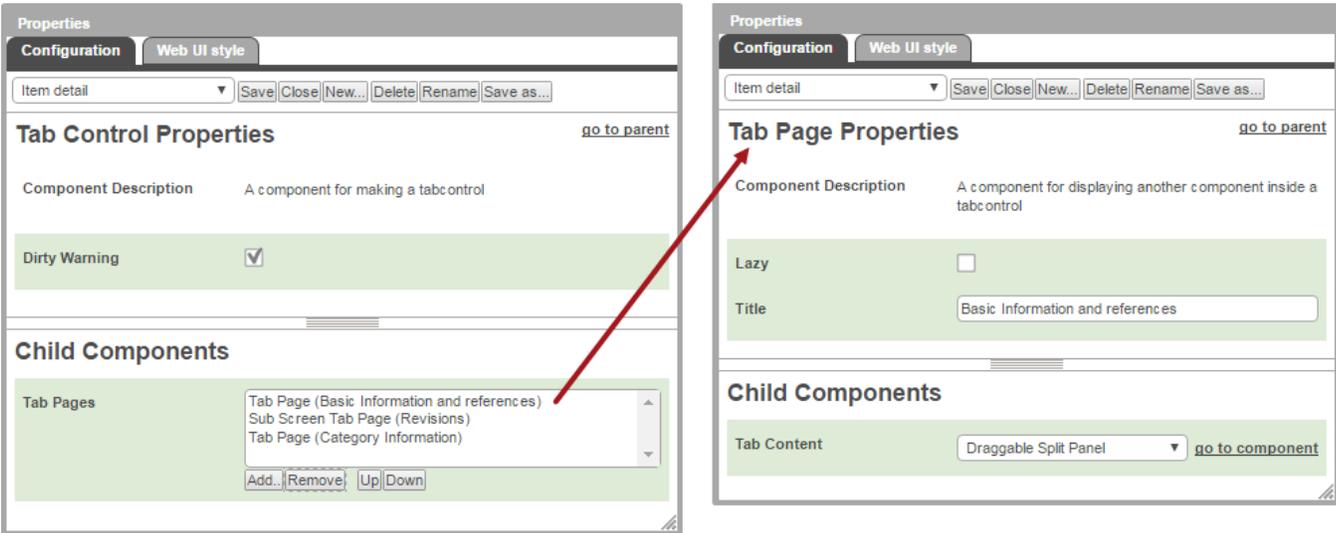
8. Click the **Save** button in the designer. Additional configuration can be performed on this Node Details screen, as desired. Additionally, multiple Node Details screens can be created and used for different objects / purposes.
9. From the designer dropdown, select ---[MAIN]--- to configure the **Mappings** parameter. It is important to remember this step so you can set up the condition / results screen combinations that allow end users to view / use the Node Details screen(s). See **Main Properties** in the **Using a Web UI** documentation for step-by-step instructions.

# Example Node Details Screens

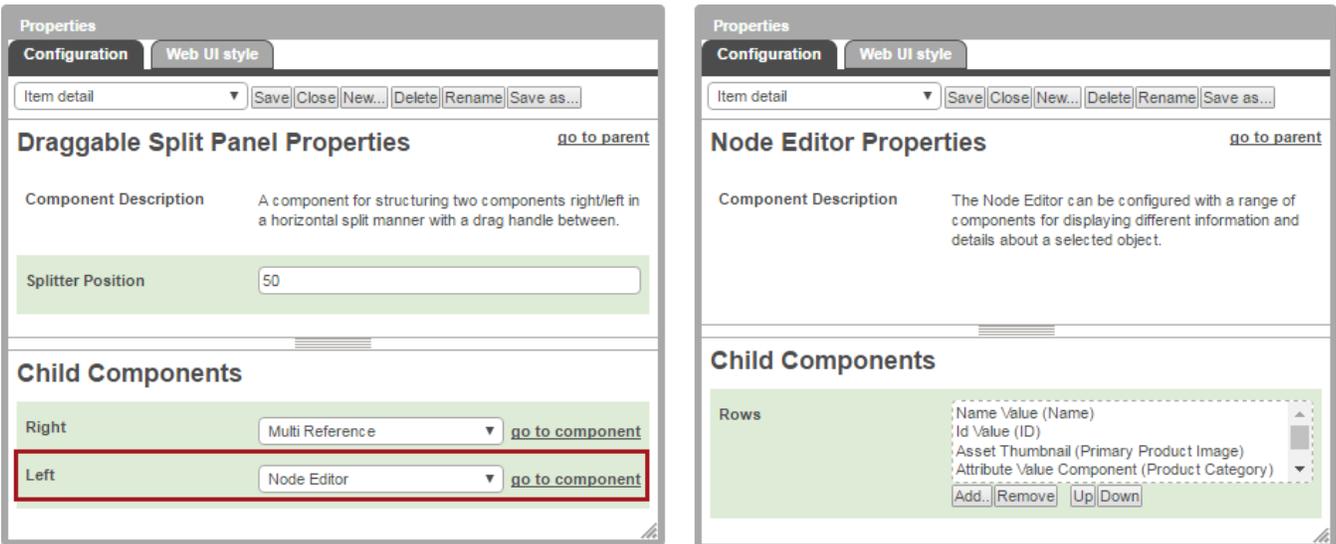
In the simple example below, a Node Details screen type has been used to create a new screen that has a 'Node Details' screen ID.

**Note:** The Node Details screen ID is used to simplify the example. The screen ID should have a descriptive name that better describes the purpose / usage of the screen and is easily identifiable.

- **Node Details Properties** is configured as follows: Child Components > Main > **Tab Control** (as seen in the screenshot under 'Child Components,' Step 1 of the 'Configuring Node Details Properties' section of this topic). For more information, **Tab Pages** are described in the **Using a Web UI** documentation.
- **Tab Control Properties** has Child Components > **Tab Pages** configured with Tab Page (Basic Information and references), Sub Screen Tab Page (Revisions), and Tab Page (Category Information) components.



- The Node Editor is a child component of a Draggable Split Panel component.



- The attributes (i.e., Name, ID, Primary Product Image) shown below are configured to display within the **Node Editor** component. Attribute Value components are added within the Child Components section of the Node Editor Properties. They can be added and removed using the buttons below the **Rows** field, and the attribute values will display on screen based on how they are ordered within the field. They can be re-ordered using the Up and Down buttons. For more information, see the **Node Editor Component** documentation in the **Web User Interfaces / Using a Web UI** documentation.

**Item**

Basic Information and references   Revisions   Category Information

Name: 12-GGK79

ID: 100703

Primary Product Image: 

Product Category <sup>fx</sup>: Products | Apparel | Upper Body Wear | T-shirts | T-shirts |

 The object is shared with 2 objects

Approved:  Last approved 2/8/16 4:38 PM

Brand Name: Yes

Brand Owner:

Base Unit of Measure: CASE

Product Name: The Blue Shirt

Description Source:

Description Target:

Short Item Description: This is a blue shirt.

Long Item Description: This is a dazzling blue shirt.

## Node Editor Component

A Node Editor component is used to display different information and details about a selected object. A Node Editor can be added as a child component of other components such as Node Details, Split Panel, Tab Page, and Draggable Split Panel.

As the Node Editor name suggests, most of the information / values displayed is editable data. However, if the end user should be restricted in regards to changing data, components (where applicable) can be made read only during configuration.

### Prerequisites

It is expected that anyone configuring the Node Editor component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

### Configuring Node Editor Properties

The Node Editor Properties consists of a **Rows** child component, which allows for the selection of various components to be used to display needed information.

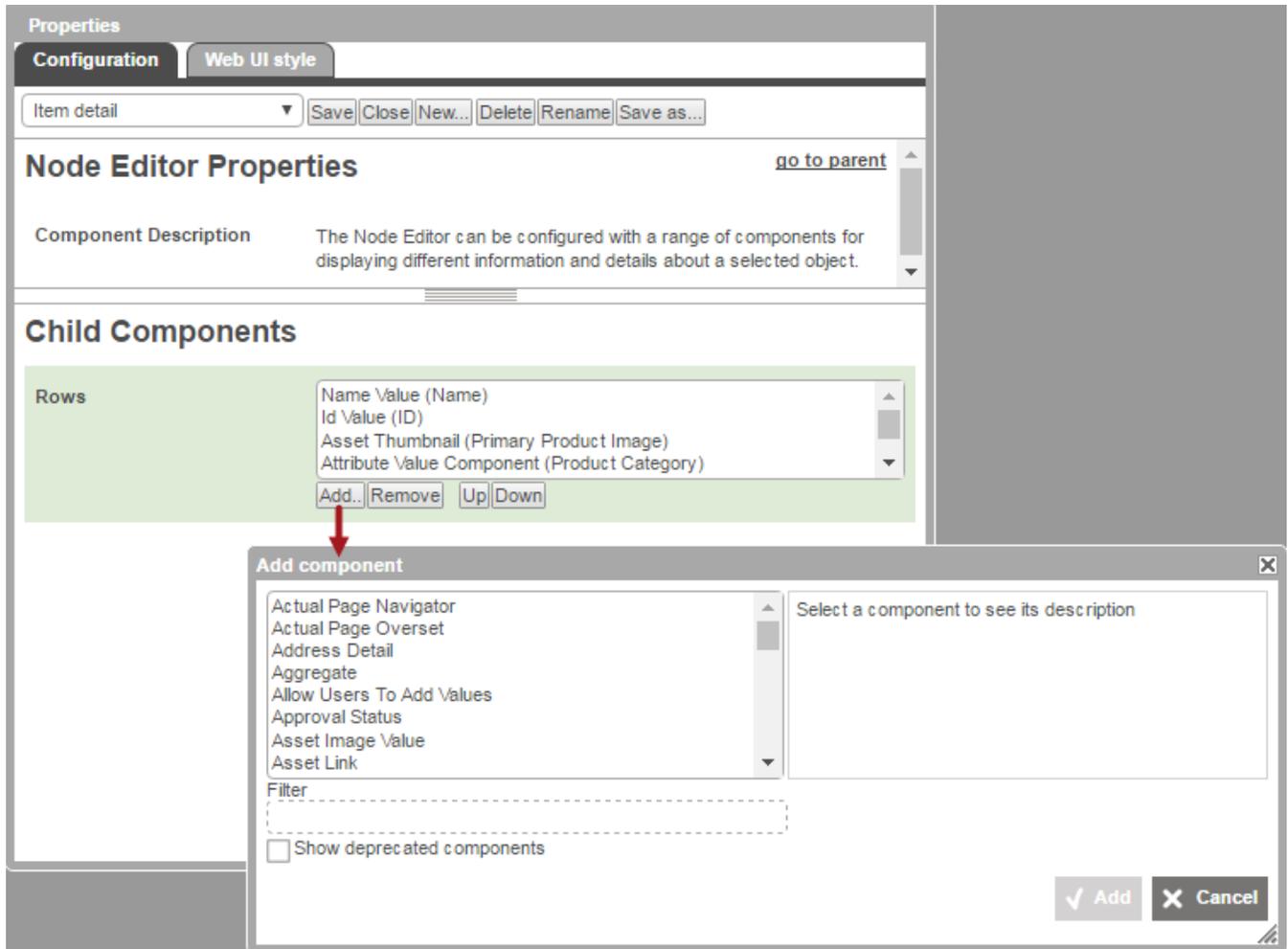
1. On Node Editor Properties, click **Add** and make a selection from within the 'Add component' dialog. Clicking on the component name displays a description of the component.

---

**Note:** Two main components used for displaying and editing attribute values are Attribute Value and Attribute Value Group. When displaying different types of objects of the same object type that have different valid attributes, a useful feature of these two components is that invalid attributes will be automatically hidden and not displayed on screen.

---

2. Once a selection is made, click **Add**.
3. Configure the added component, if applicable. As an example, adding an Attribute Value Component automatically brings up an additional properties screen with a required Attribute parameter. If you are adding Name Value or Id Value components, no additional configuration is needed.



4. Components can be added and removed using the buttons below the Rows field, and the components will display on-screen based on how they are ordered within the field. They can be re-ordered using the Up and Down buttons and can be edited by double clicking the component name.
5. Once the configuration is complete, click **Save** in the designer and **Close** to return to normal Web UI operation.

For additional information on using a Node Editor, see the following topics in **Web User Interfaces / Using a Web UI**:

- **Node Details Component**
- **Attribute Value Components**
- **Attribute Value Group Components**

## Examples of Configured Node Editor Components

Below are examples of Node Editors that are configured to fit different purposes and screenshots of how they would display to end users.

**Example 1: A Node Editor configured to display sellable product information.** Components added to the Rows field (and shown below, in order from top to bottom) are Name Value, Id Value, Asset Thumbnail, Attribute Value Component (Product Category), Shared Target Information, Approval Status, and Attribute Value Group Component (Brand Name through Long Item Description).

### Item

- Basic Information and references
- Revisions
- Category Information

Name: 12-GGK79

ID: 100703

Primary Product Image: 

Product Category <sup>fx</sup>: Products | Apparel | Upper Body Wear | T-shirts | T-shirts | 

 The object is shared with 2 objects

Approved:  Last approved 2/8/16 4:38 PM

Brand Name: Yes

Brand Owner:

Base Unit of Measure: CASE 

Product Name: The Blue Shirt 

Description Source:

Description Target:

Short Item Description: This is a blue shirt.

Long Item Description: This is a dazzling blue shirt. 

**Example 2: A Node Editor configured to display customer address detail information.** The Address Detail component is configured as the only component in the Node Editor Properties > Child Components > Rows field. Further configuration is done in the Address Detail Properties by adding components to Child Component > Rows.

Address



Country

State

City

Street Number

Street Name

**Example 3: A Node Editor configured to display GDSN details.** Components added to the Rows field (and shown below) are Name Value, Object Type, and three Reference Value components, each with different reference types selected.

Name

Object Type

GDSNCIC Recipient

GDSNCIC Registration

GDSNTarget Market

# Node List Component

A Node List component displays objects in a table / grid format. The view can be further customized by configuring the data to display via different display modes and adding different action buttons that users can click while working with the object data. The display modes can then be customized with a range of headers, allowing for different information about the listed objects to be displayed. The behavior of many of the various actions can be further configured, also.

A Node List can be added as a child component of various other components including, but not limited to, Multi Reference, Packaging, Task List, Display Children Screen, Collection Content, and Advanced Search.

Below is one example of a Node List (configured as a child component within Multi Reference Properties).

Item

Basic Information and references | Revisions | Category Information | Additional Information | Packaging Hierarchy | Status | Manufacturer Information | References

	555-2033_M	555-22346	Acme	Acme Tire Repair Kit	L23-RP4100
ID	8801	6806	168241	168238	22624
Name	555-2033_M	555-22346	Acme	Acme Tire Repair Kit	L23-RP4100
Object Type	Installation Manual	Item	Logo	Product Image	Item
Reference type	Installation Manual	Supplier Replacement Item	Brand Name Logo	Primary Product Image	CrossReference
Thumbnail					
<b>+ ATGroup</b>					
Air gauge included		Yes			No
Hose length		28			28 in
Primary Color		Black			Orange

Specific details on setting up this particular Node List can be found in the Multi-Reference Editor topic in Using a Web UI. General Node List configuration instructions can be found below.

## Prerequisites

It is expected that anyone configuring the Node List component is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. In addition, the user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web User Interfaces / Web UI Getting Started** documentation.

## Configuring Node List Master Component Properties

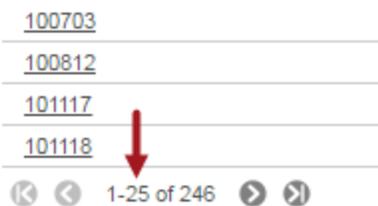
A Node List is highly configurable. Each parameter in Node List Properties features help text, accessible by hovering over and clicking a yellow info icon to the right of each parameter name. The default parameter settings may differ depending on where a Node List is used. The following screenshot shows another example of a Multi Reference Properties Node List.

Follow these steps to configure the component:

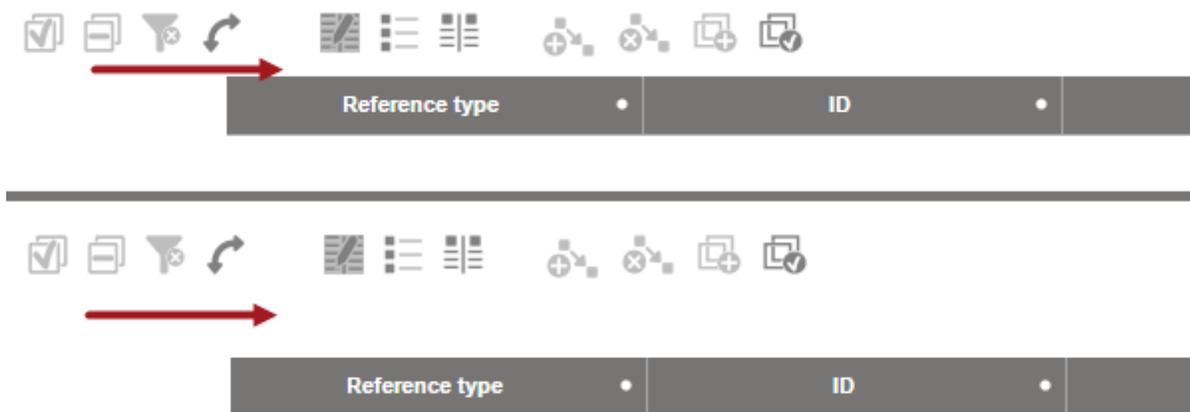
1. Enable or disable **Hide Standard Buttons**, as desired. When enabled, the 'Select all,' 'Clear selection,' and 'Clear all filters' buttons display above the table.



2. The only mandatory parameter is **ID**. A descriptive, unique ID can be given or the standard pre-filled text can be kept. The STEP system uses this ID to recognize which Node List to display.
3. Either enable or disable **Lookup Screen Type For Navigation** based on the desired behavior, outlined below:
  - If unchecked, then the object screen selection that is defined under Selection Screens will be used as a target screen (e.g., Asset Selection Screen, Classification Selection Screen, Product Selection Screen, and Entity Selection Screen).
  - If checked, then the screen mappings that are defined in the Main Properties are used when selecting the object from the Node List.
4. When using Table Display Mode (List view), Film Strip Display Mode (Filmstrip view), and Gallery Display Mode (Gallery view), the objects in the table are displayed by page. You can determine the maximum number of objects to show per page. Change the number in the **Page Size** field or use the default (25 objects per page).



5. **Toolbar Height** determines the distance (in pixels) between the top of the table and the action buttons. Change the number, if desired, or keep the default setting. See the examples that follow. The first image below shows the Toolbar Height set at 30 pixels; the second image shows the Toolbar Height set at 60 pixels.

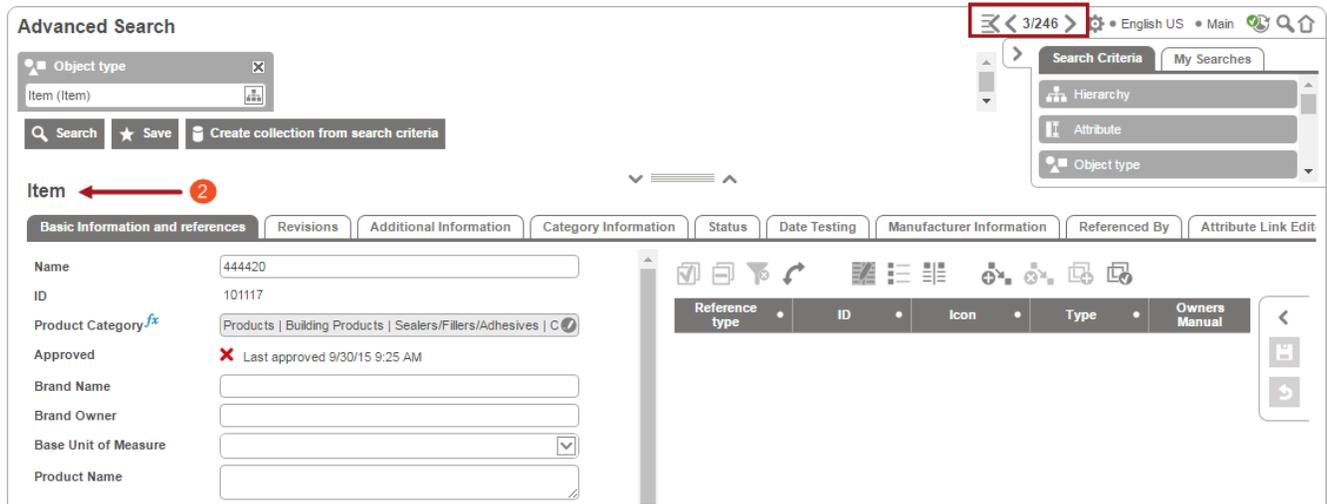
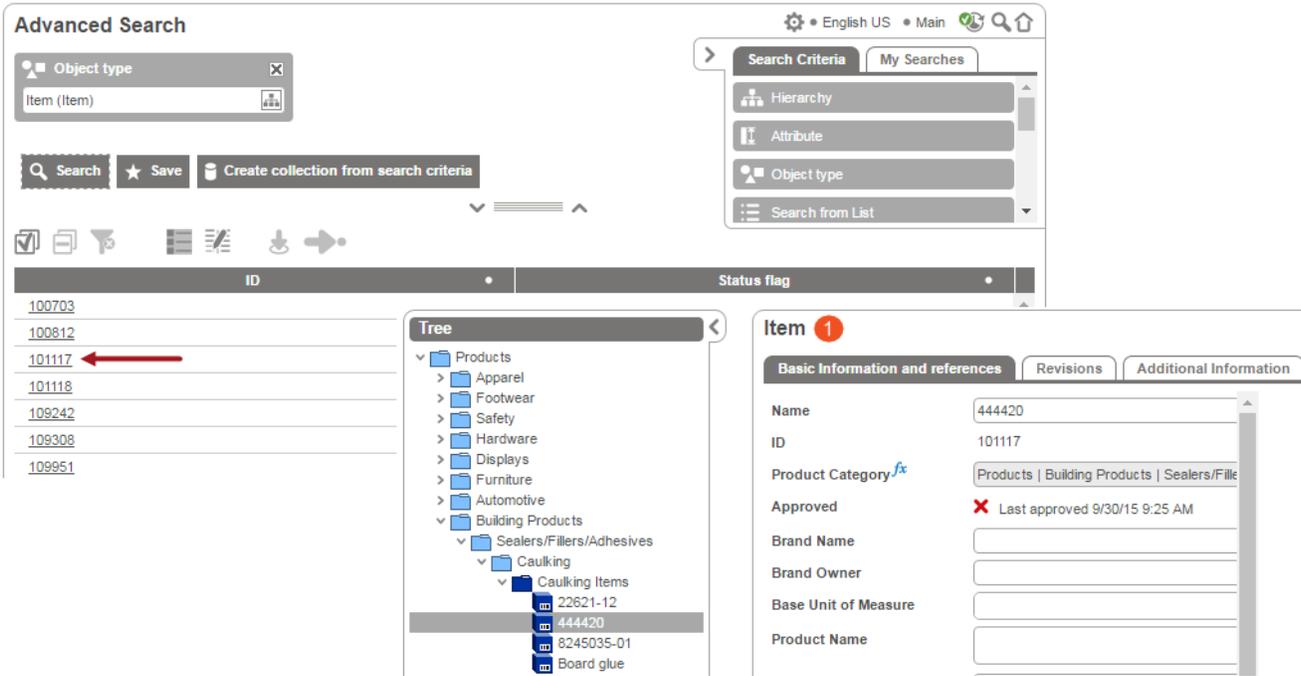


6. Determine how the object data should be displayed when you click on an object ID link in a Node List. You can either view the object details directly on the same screen by enabling the **Use Details Overlay** parameter—or view the object details on a different screen. Both methods use the same screen mappings (dependent on how

you have set up the parameters) and display the same information. To better explain, below are two examples, both using the Advanced Search screen type:

A user runs a search and then clicks on ID 101117 that is shown in the results list, which is a Node List in List view.

- Example 1: **Use Details Overlay** is disabled, so the screen navigation takes the user to the Item Details screen.
- Example 2: **Use Details Overlay** is enabled, so the Item Details screen displays as an overlay on the Advanced Search screen. Users can easily return to the results list / Node List by clicking the  icon in the upper right corner and can use the arrows to navigate through each Node List item.



7. Select a **Default Sorting Order** option (Ascending or Descending), if desired.
8. If a Default Sorting Order is selected, enable **Enable Default Sorting** by checking the box. When enabled, initial table sorting will be performed on the contents of the first column or row (depending on property direction) when applicable, otherwise on ID. If disabled, no initial sorting will be performed.

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**Note:** If Table Sorting is enabled for one of the headers configured within a display mode, then that setting overrides the Node List Enable Default Sorting selection.

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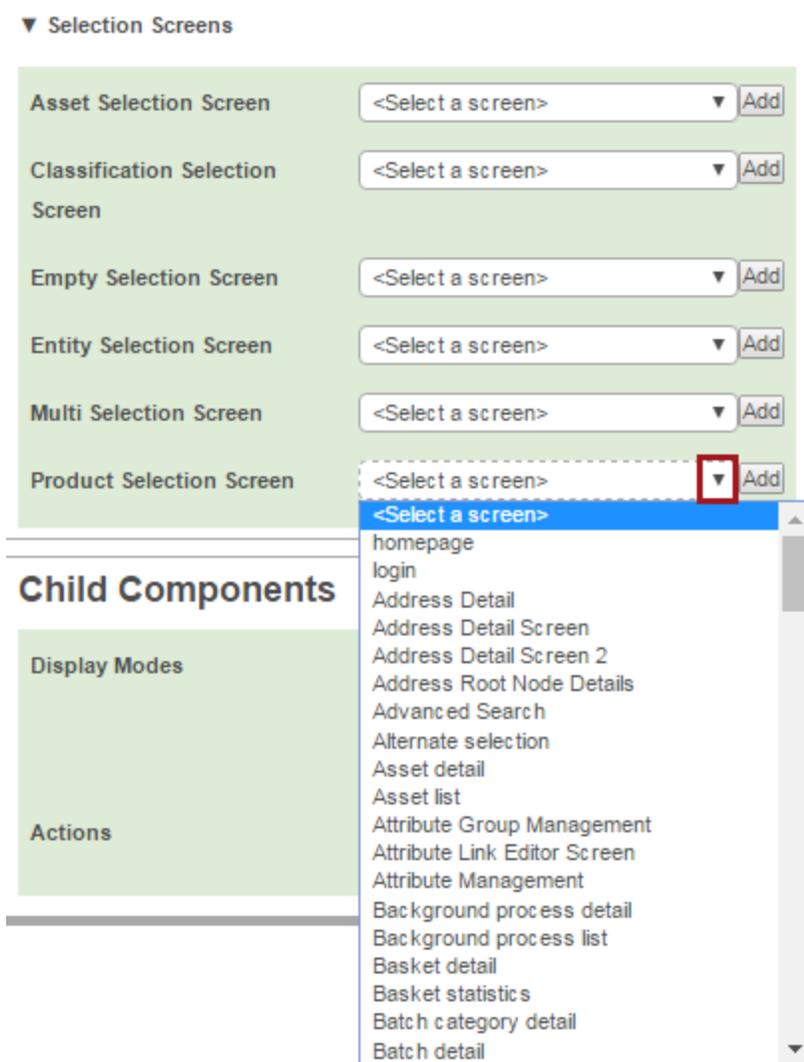
Access additional parameters by clicking on **Label Texts**.

9. Under Label Texts, if desired, change the hover text displayed for one or all of the three standard buttons (described in Step 1) by typing the desired text into the **Clear All Filters**, **Clear Selection**, and/or **Select All Label** parameter fields.
10. To display text / information to a user looking at data in Table Display Mode (List view), Film Strip Display Mode (Filmstrip view), or Gallery Display Mode (Gallery view), add it to the **Multi Select Help Text** parameter. It is blank by default. An example follows.

The screenshot shows a configuration panel for 'Label Texts' with four input fields: 'Clear All Filters', 'Clear Selection', 'Multi Select Help Text', and 'Select All Label'. To the right is an 'Advanced Search' section with a search bar and buttons for 'Search', 'Save', and 'Create collection from search criteria'. Below these is a table view with a header 'ID' and several rows of data. A red arrow points from the 'Multi Select Help Text' input field to the 'Multi Select Help Text' parameter in the table view.

Access additional parameters by clicking on **Selection Screens**.

11. Under Selection Screens, if you wish to override the configured Web UI mappings, make selections regarding which screen(s) a user will see after clicking on object links in the table. Using the dropdown for each parameter, select the ID of the screen to display when:
  - **Asset Selection Screen:** A single asset is selected.
  - **Classification Selection Screen:** A single classification is selected.
  - **Empty Selection Screen:** The selection is empty.
  - **Entity Selection Screen:** A single entity is selected.
  - **Multi Selection Screen:** The selection has multiple entries.
  - **Product Selection Screen:** A single product is selected.



**Important:** If using these screens instead of the Main Properties mappings, you also need to disable the Lookup Screen Type For Navigation parameter, as described earlier in this topic.

## Configuring Node List Child Component Properties

**Display Modes** and **Actions** are configured in the Child Components section. Each selection corresponds to a button / icon that will display above the data table. Display Modes determine how the entire Node List displays, and actions can be performed on the selected nodes and/or objects. The buttons / icons are enabled when they are applicable for use.

Here are basic instructions for configuring each with more detail following the steps.

1. Click the **Add** button under the parameter field.
2. Make a selection in the 'Add component' dialog.

3. Click **Add** again. New selections are added to the bottom of the list and can be re-ordered using the Up and Down buttons. The icons / buttons will display left to right on the screen in the top-to-bottom order shown for the parameter.
4. Repeat Steps 1 through 3 as needed.
5. Double click on the display mode title in the field to configure the component properties.

Icon	Display Mode	Button Hover Text	Description
	Multi Edit	Multi edit view	Configurable table; allows for editing of the objects
	Table	List view	Configurable list (vertical columns)
	Compare	Compare view	Table with customizable headers; can change table direction and select a title to use for identifying the objects displayed
	Film Strip	Filmstrip view	A single row of icons / images representing the objects
	Gallery	Gallery view	Grid with icons / images representing the objects; typically used for lists of image assets
	Grid	Grid view	Configurable grid; designate what attribute value is displayed
	Sequencing	Sequence view	Table used for sequencing children of the current object (via the Display Children Screen and Children of Type)

Clicking through the actions in the 'Add component' list will provide more details on what each action does. Also, many actions are explained in detail in applicable topics within the **Using a Web UI** documentation, as they pertain to specific functionality. Actions examples include (but are not limited to) Add Reference Action, Remove a Reference Target, Excel Export Action, Start Workflow from Grid, and Simple Exporter Action.

For additional information on using a Node List, see the following topics in **Web User Interfaces / Using a Web UI**:

- **Node Details Component**
- **Main Properties**

- **Multi-Reference Editor**
- **Advanced Search**

# Onboarding Multiple Objects Using Web UI Screens

## Prerequisites

Onboarding multiple objects using Web UI Mass Creation components requires designers to configure a screen and a widget. Detailed configuration instructions are provided in separate topics of the Web UI documentation:

- **Configuring a Mass Creation Screen**
- **Mass Creation Widget**

Additionally, end users must have the necessary privileges to create and onboard objects in STEP as well as have access to selected parts of the Tree hierarchy (e.g., the product hierarchy). For more information about privileges and user setup, see the **Users and Groups** section and **Adding User Privileges for a Group** section of the **System Setup / STEP Super User** documentation.

## Mass Creation Screen

The Mass Creation screen is used to set up multiple Product, Entity, and Classification objects in STEP and initiate them into STEP simultaneously. Using Web UI screens to onboard multiple objects into STEP provides an alternative to using more complex import methods such as Smartsheets.

## Mass Creation Widget

The Mass Creation homepage widget should be configured as the entry point to a Mass Creation screen. Admin users can set the static root nodes that limit what an end user has access to when onboarding objects. If a STEP hierarchy is extensive, this is particularly useful if an end user should focus on one product category and not another one.

Multiple widgets and screens can be set up to meet onboarding needs. As an example, multiple users may be onboarding products in different categories, and it would be useful to have multiple widgets set up to direct users to the applicable Mass Creation screen they should use.

For more information on using a configured Mass Creation screen and widget, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

## Configuring a Mass Creation Screen

The Mass Creation screen is used to set up multiple **Product**, **Entity**, and **Classification** objects in STEP and initiate them simultaneously.

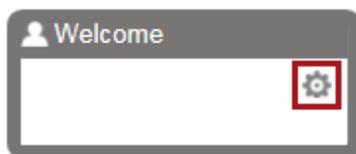
Admin users first need to create a screen using the Mass Creation screen type. Once the screen is created, configuration can begin.

Multiple screens / configurations can be saved to meet a variety of onboarding needs.

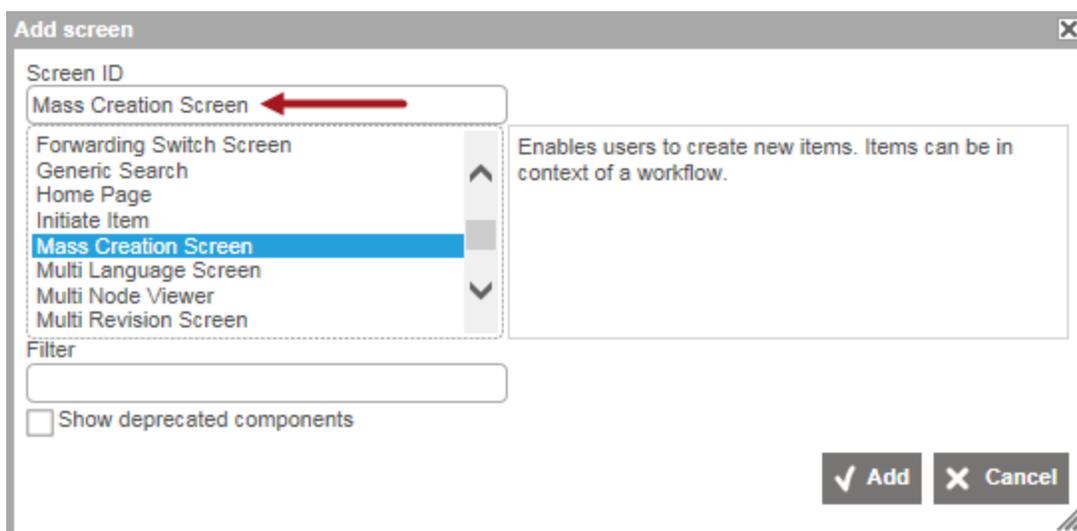
### Adding a New Mass Creation Screen

To add a screen using the Mass Creation screen type:

1. Log in to the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the Homepage (in the user widget).



3. Click the **New** button in the action icon row.
4. Choose **Mass Creation Screen** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable as this will be what is shown to anyone trying to access the screen through design mode or who is using the screen as a results screen for a Mass Creation Homepage widget.



5. Click **Add**.
6. Click **Save** in the Designer window. At this point, either close Designer and configure the screen at a later time, or continue on with the **Mass Creation Screen Properties** configuration.

## Configuring a Mass Creation Screen

A screenshot of the default properties screen follows. In place of outlining steps a Web UI designer should take to configure the screen properties, the sections directly after the image explain what each parameter does and the options for configuring them. Each parameter should be configured as needed.

### Attributes and Groups

Any attribute groups and/or attributes selected will display as editable columns, if applicable, in the **Mass Creation** screen grid. These can be added, removed, and re-ordered using the buttons under the **Attributes and Groups** field.

Administrators are encouraged to follow best practices and put all category-specific attributes into one super attribute value group (e.g., Dimensions). Objects can be further divided into sub-groups (e.g., Height and Width). Any attribute sequencing will need to be done following standard procedures if attribute values should be filled out in a specific order.

There are three default columns that will display automatically, even if the **Attributes and Groups** field is empty. They are **Structure**, **ID**, and **Name**. See the example below.

Mass creation - Products (ProductsRoot)

Structure	ID	Name
Level1		

## Business Condition

To apply a business condition, within **Mass Creation Screen Properties**, click the ellipsis button to the right of the Business Condition field to browse / search and select one. The business condition ID displays within the properties field. Click the ellipsis button to select a different business condition, and click the Clear button to the right of the ellipses button to remove an existing condition.

A business condition may be selected and used for validating object data. An end user can run a business condition validation on all rows at any time by clicking the business condition button. Also, if only a subset of the data should be tested, a user can select certain rows prior to clicking the business condition button. The business condition also runs and validates the data automatically when the Create button is clicked.

The business condition button appears to the right of the Create (shown by default) button within the user interface. The business condition name is shown on the button, and the button only displays if a business condition is selected.

For more information about Business Conditions, see **Overview of Business Conditions** in the **Business Rules** documentation.

## Object Types

**Product**, **Entity**, and **Classification** object types can be added, removed, and re-ordered using the Add, Remove, Up, and Down buttons under the **Object Types** field. The configured list will serve as the object type or types available for the user when creating new objects.

Please note that assets cannot currently be created using a Mass Creation screen.

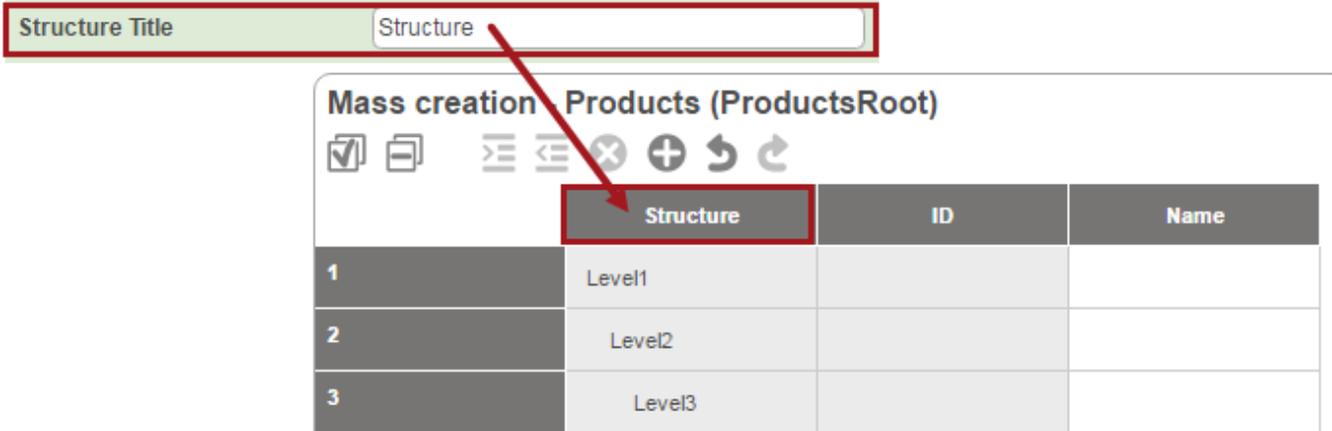
### Screen

Using the Screen dropdown list, select the screen that users will be forwarded to once they create and successfully save objects in STEP. If the desired screen does not already exist, there is an Add button to the right of the dropdown.



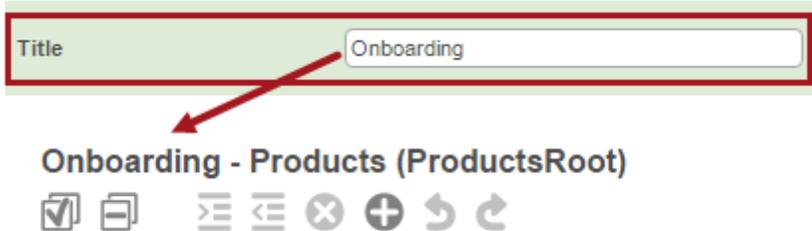
If adding a new screen, pick a screen type, and give it a descriptive Screen ID as described in the **Adding a New Mass Creation Screen** section of this topic. Once **Add** is clicked within the 'Add screen' dialog, the newly created Screen ID will auto-populate in the Screen field. Using standard processes, configuration can be done on the newly created screen once the **Mass Creation Screen Properties** are saved.

### Structure Title



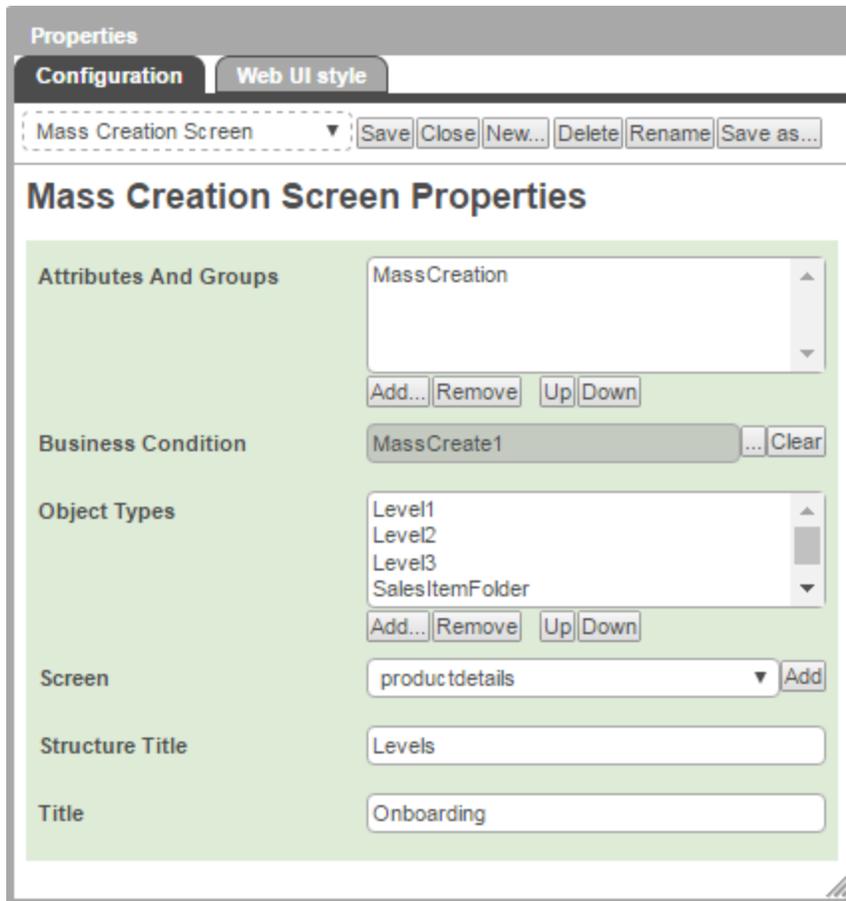
The object hierarchy Structure column, displayed by default, can be renamed to something more meaningful to the end user.

### Title



'Mass creation' is the default title given to a new Mass Creation screen and is displayed at the top of the screen above the action buttons. Edit the **Title** field, if desired, to something more descriptive. The title is especially important if using multiple Mass Creation screens to onboard different object categories or object types.

Below is an example of the **Mass Creation Screen Properties**, fully configured:



After parameter selections have been made, click **Save** at the top of the Designer window. Close the window or select --[HOMEPAGE]-- to continue on and configure the Mass Creation widget. For more information, see the **Mass Creation Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

For more information about using the Mass Creation components, see the **Using a Mass Creation Screen and Widget** section of the **Web User Interfaces / Using a Web UI** documentation.

# Using a Mass Creation Screen and Widget

Users can create objects, create object hierarchies, and initiate objects into workflows all on one dedicated Mass Creation screen—and get to that screen using a Mass Creation homepage widget. Multiple Mass Creation screens and Mass Creation widgets can be configured and saved to meet different onboarding needs.

## Steps to Multiple Object Creation

For simplicity, these steps and images are provided using the final property configurations shown in the **Configuring a Mass Creation Screen** and **Mass Creation Widget** documentation.

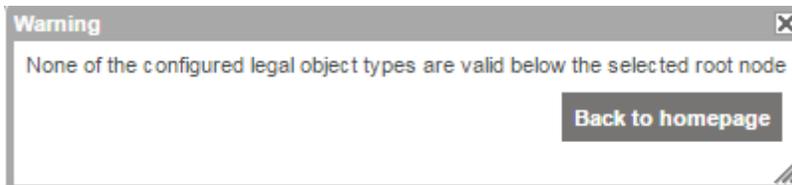
**It is important to note that a maximum of 500 objects can be created per Mass Creation screen session.**

All create actions must occur in a single session without navigating away from the Mass Creation screen. Incomplete data cannot be saved in Web UI for a later submission. Also, only one supertype at a time can be loaded per Mass Creation screen session (e.g., all Products or all Classifications—not a mix of both).

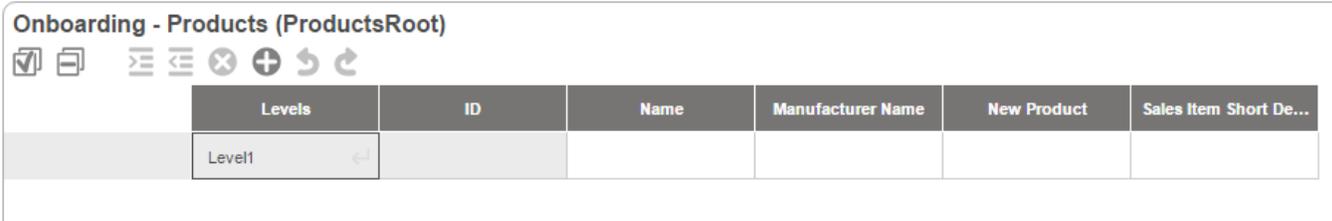
1. Go to the Mass Creation widget on the Web UI homepage.
2. Select a parent object by clicking the node picker and using the configured selection tabs. The widget also has a type-ahead search feature (type in the empty area to the left of the node picker icon). The last nine selections / searches are listed on the widget under the **Latest searches** heading. The Mass Creation screen designated as the results screen in the widget configuration will display.



- If a user clicks on the widget node picker and chooses a root node that is not compatible with the Object Types selected during the screen Mass Creation Screen configuration, then the below message will display.



- If there are no issues, then the Mass Creation screen will display.



3. Enter and organize the data. (Up to 500 objects can be created per Mass Creation screen session.)
  - To begin, enter object data by cutting and pasting data into the table (e.g., from an Excel spreadsheet) or manually entering it.
  - Navigate by tabbing through cells or clicking in cells using a mouse. List of Values (LOV) cells are identifiable by a light gray enter icon that will display once you click or tab into the cell (↵).

**Note:** Engaging an LOV cell works the same across STEP Web UI components. Standard instructions to engage an LOV are to double-click in the cell. Because behavior between browsers and systems differs, if you are using just your keyboard, hit enter twice when you have tabbed in to an LOV cell; if the LOV does not display automatically, press the Alt key and the down arrow at the same time (or just the down arrow key). Click on a value to make a selection or type two or more letters / digits to identify a selection. If you want to filter through all entries, as an example, that start with 'G,' just type the letter G multiple times to cycle through the options.

- Once you enter data in the first available cell and hit tab or enter, a data row is created. An empty data row remains at the bottom of the grid for ease and convenience of entering data and adding rows. Only the data in rows marked with numbers will be used to create actual objects.
- Organize the object hierarchy and create parent / child relationships on the screen using the Structure cell options and the action buttons.
  - Users are limited by the existing object type structure. The structure on the Mass Creation screen is created based on the existing object data model set up and configured to be used.
  - If more than one object type is available for the structure level you are creating, then the cell in the Structure column will change colors and there will be a dropdown of choices available.
  - The action buttons are located on the screen below the title and above the grid. The buttons will become active when it is valid for them to be used. From left to right order, the buttons are:

Icon	Button	Function
	Select all items	Highlights / selects all lines of the grid except the last line; can be used if you want to validate data using a business condition any time during the data entry process
	Deselect all items	Unselects all rows

Icon	Button	Function
	Indent selected items	Creates child objects; highlight row(s) and click the indent button; Structure column will update accordingly
	Outdent selected items	Creates parent objects; highlight row(s) and click the outdent button; Structure column will update accordingly
	Remove selected lines	Deletes rows from the grid; select at least one row to activate the button User will receive a confirmation message they must confirm; empty row cannot be removed
	Insert new line above selected entry	Adds a row to the grid
	Undo latest change	Allows user to undo their last change
	Redo latest undo change	Allows user to redo a change after undoing it

- As data is entered, any cells with validation issues will be marked with a yellow indicator icon. These errors (e.g., entered data does not match an LOV value, entered data is not valid for the attribute's validation base type) need to be addressed before the Create button is clicked.
- If using a business condition, additional validation can be done at any time by clicking the business condition button, which is located to the right of the Create button on the bottom left side of the screen. In the example that follows, the business condition is named Mass Create. The business condition automatically runs when a user clicks the Create button. See **Validating Data** below for more information regarding validation responses.



- When done entering data into the grid and correcting any validation errors, click **Create**.
- Address any issues, if applicable, that are displayed via an informational pop-up message (see **Validating Data** below). If the business condition validation fails for any reason upon clicking Create, none of the objects nor the object hierarchy structure will be created.
- When creation is successful, the user will automatically be routed to the screen configured in the Screen parameter of the Mass Creation Screen Properties settings. If applicable, the new objects will automatically be initiated into workflows based on your existing workflow rules. (For more information about workflows and auto-initiation, see the **Auto-Initiation of Tasks in Workflows** topic in the **Workflows** documentation.)

**Example**

The images that follow show a simple example of objects and an object hierarchy being created.

- The object type directly under Level1 has two options (Level2 and Level2.1).
- Level3 is being indented to become a child of Level2.
- The set of objects passed validation when Create was clicked. The objects / object hierarchy were created and the screen was routed appropriately based on the configured Screen parameter within the Mass Creation Screen Properties.
- The newly created objects are shown in the Web UI Tree.

**Onboarding - Products (ProductsRoot)**

	Levels	ID
1	Level1	
2	Level2	
3	Level1	
4	Level1	
	Level1	

**Onboarding - Products (ProductsRoot)**

	Levels	ID
1	Level1	
2	Level2	
3	Level2 Level2.1	
4	Level1	
	Level1	

**Onboarding - Products (ProductsRoot)**

	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
1	Level1					
2	Level2					
3	Level2					
	Level1					

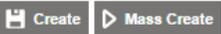
**Onboarding - Products (ProductsRoot)**

	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
1	Level1					
2	Level2					
3	Level3					
	Level1					

Onboarding - Products (ProductsRoot)



	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
1	Level1		Electronics	Rise-N-Shine	Yes	Top folder for electr...
2	Level2		Small Appliances	Rise-N-Shine	Yes	Top folder for small ...
3	Level3		Clocks	Rise-N-Shine	No	Top folder for clocks
4	SalesItemFolder		Alarm Clocks	Rise-N-Shine	Yes	Variety of alarm cloc...
5	SalesItem		Alarm-A	Rise-N-Shine	Yes	Digital
6	SalesItem		Alarm-B	Rise-N-Shine	Yes	Analog
7	SalesItem		Alarm -C	Rise-N-Shine	Yes	Glow in the dark
8	SalesItem		Alarm-D	Rise-N-Shine	No	Large display
9	SalesItem		Alarm-E	Rise-N-Shine	Yes	Travel size
	Level1					



**Tree** <

- > Products
  - > Apparel
  - > Footwear
  - > Safety
  - > Hardware
  - ▼ Electronics
    - ▼ Small Appliances
      - ▼ Clocks
        - ▼ Alarm Clocks
          - Alarm-A
          - Alarm-B
          - Alarm -C
          - Alarm-D
          - Alarm-E
- > Discontinued Products
- > Packaging
- > Assets
- > Suppliers
- > Web Sites
- > Merchandising Hierarchy
- > Collections
- > Entity Root
- > Recycle Bin

System Setup

Validating Data

- If there is a **cell-level validation** error, an icon appears in the cell:

- If a **business condition validation** fails, an icon appears in the row with an error and a validation message appears:

**Mass Create Validation Failed**  
5 object(s) validated; found 3 error(s)

- 2 : Value for "Manufacturer Name": "Rise-And-Shine" does not equal "Rise-N-Shine"
- 3 : Value for "Manufacturer Name": "no value" does not equal "Rise-N-Shine"
- 5 : Value for "Manufacturer Name": "Rise-N-Shone" does not equal "Rise-N-Shine"

	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
1	Level1		Electronics	Rise-N-Shine	Yes	Top folder for electr...
2	Level2		Small Appliances	Rise-N-Shine	Yes	Top folder for small ...
3	Level3		Clocks	Rise-N-Shine	No	Top folder for clocks

- If a **business condition validation** is successful (pre-Create), a 'Succeeded' validation message appears:

**Mass Create Validation Succeeded**  
3 object(s) validated; found 0 error(s)

	Levels	ID	Name	Manufacturer Name	New Product	Sales Item Short De...
1	Level1		Electronics	Rise-N-Shine	Yes	Top folder for electr...
2	Level2		Small Appliances	Rise-N-Shine	Yes	Top folder for small ...
3	Level3		Clocks	Rise-N-Shine	No	Top folder for clocks

- When the **business condition validation** is done at the time a user clicks Create, no message displays if the validation is successful. A message only appears if the validation fails.

## Packaging Hierarchy Editor

The Packaging Hierarchy Editor is a component designed to ease the work with the often comprehensive task of packaging logistics. The Editor is built around an intuitive graphical user interface that visualizes all available packaging hierarchies that a selected item is part of or a packaging object is included in.

The user interface interacts seamlessly with a multi-editor, enabling the user to browse through available packaging hierarchies quickly and see relevant information about an item and packaging objects (e.g., dimensions and weight). In addition to displaying information, the multi-editor also allows for the maintaining of attribute links and attribute values on packaging objects. Users are also able to add new levels to build on existing packaging hierarchies and to unlink removed levels.

For information about setting up and using the Packaging Hierarchy Editor, see these sections in the Web User Interfaces documentation:

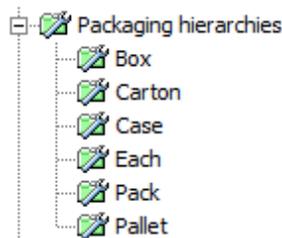
- Configuration of the Packaging Hierarchy Editor in STEP Workbench
- Set Up of the Packaging Hierarchy Editor in Web UI
- How to Use the Packaging Hierarchy Editor

# Configuration of the Packaging Hierarchy Editor in STEP Workbench

## Data Structure and STEP Workbench Setup

### Create object types for packaging objects

The first step when configuring the STEP Workbench is to create the packaging object types that are going to be used in the Packaging Hierarchy Editor. These packaging objects represent the different packaging types making up the packaging hierarchies (e.g., Box, Case, and Pallet). The packaging object types should be created under Object Types & Structures under System Setup. Once the desired folder is found, right-click on it to create a New Object Type.



For the Packaging Hierarchy Editor to work, it is important that all Packaging Object Types created are configured to have automatically generated IDs. For this purpose set ID Pattern to **[id]**.

Description	
Name	Value
ID	Box
Name	Box
Last Edited by	2014-12-05 10:25:00 by STEPSYS
Name Pattern	
ID Pattern	[id]
Manually Sorted	No
Enable Profiling	No
InDesign Template Allowed	No
Quark Template Allowed	No
Icon	
Dimension Dependencies	
Offers	

### Create references between the packaging objects

In order to create the level structure of the Packaging Hierarchy Editor, after creating the needed packaging objects, the objects should be linked to. This is done by creating product references between the packaging objects (System Setup > Reference Types > Product Reference Types). Since it is the direction of the references

between the packaging objects that decides the packaging hierarchy structure, it is crucial that the reference source is the higher level packaging object and the reference target is the lower level object type. For example, Pallet-to-Box.

The screenshot shows a tree view of 'Reference Types' under 'Product Reference Types'. The 'Packaging\_Box\_Pack' node is highlighted with a red box. To its right, configuration details are shown:

- Valid Source Types:** ID, Box, Modify Source Types
- Valid Target Types:** ID, Pack, Modify Target Types

**Create quantity attribute**

For the Packaging Hierarchy to work, it is a requirement to create a Description attribute valid for all configured references between packaging types. This attribute should be set up to contain the quantity of the next lower level package quantity and will be used in the Component Model Configuration, which is explained in the next section. In the examples going forward, this attribute is named 'Qty of Next Lower Package.'

**Note:** This quantity attribute should be a single-valued attribute. If it is a multi-valued attribute, end users may run into errors within the Packaging Hierarchy Editor (Number Of Items calculations and Node List editing).

Packaging Hierarchy References				
Reference Type		Source	Qty Of Next Lower Package	
> Case To Child	+			
> Pack To Child	+			
> Pallet To Child	+			

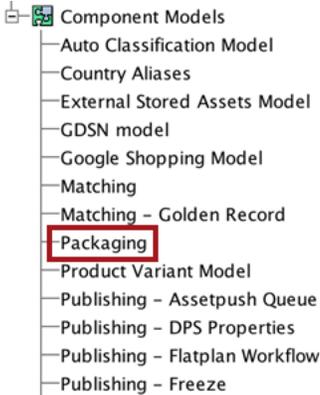
The 'Edit Component Model Configuration' dialog box shows a table with the following configuration:

Name	Value	Description
> Packaging object types	Pack, Pallet, Case, Item	List of product object types that are used in the Packaging Component Model
✗ Quantity of the next lower level package		Description attribute containing the quantity of the next lower level packages
> Packaging reference types	Pack To Child, Case To Child, Pallet To Child	Reference types that relates a packaging object to its child packaging object

Buttons at the bottom: Save, Restore live settings, Save pending, Cancel

## Set up the Component Model

When all previously mentioned steps have been completed and the data structures have been defined, it is possible to set up the Component Model Configuration. The Component Model for the Packaging Hierarchy is found under Component Models on the System Setup tab.



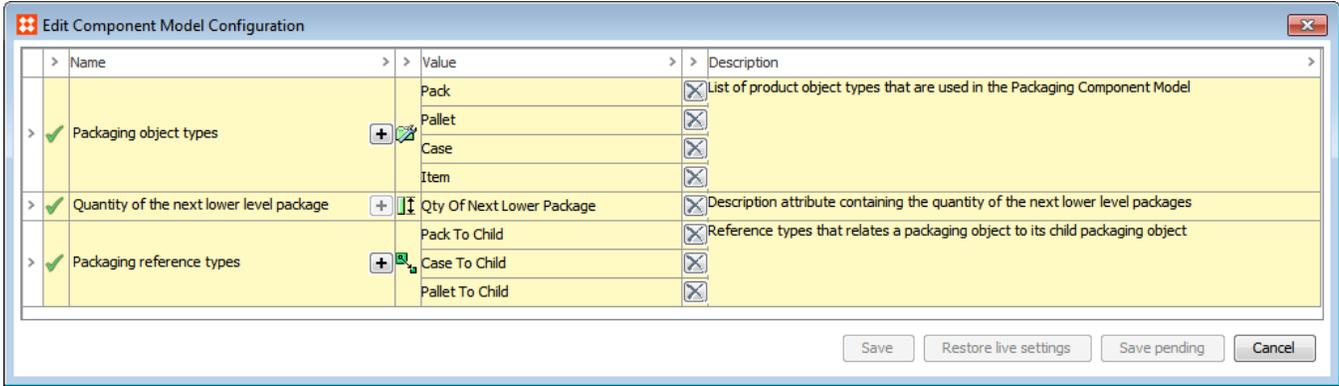
The configuration of the Packaging Component Model consists of three sections (Click Edit to populate the model):

- **Packaging object types** should contain all object types used in the Packaging Hierarchy Editor.
- **Quantity of the next lower level package** should point to the quantity attribute created as part of the setup.
- **Packaging reference types** should include all reference types that are used in the packaging hierarchy structure.

**Important:** In order to set up the Component Model properly, it is important that the packaging hierarchy object types contain the item (product), which represents the lowest level in the packaging hierarchy.

Component Model Configuration			
Name		Value	Description
> Packaging object types		Pack	List of product object types that are used in the Packaging Component Model
		Pallet	
		Case	
		Item	
> Quantity of the next lower level package		Qty Of Next Lower Package	Description attribute containing the quantity of the next lower level packages
> Packaging reference types		Pack To Child	Reference types that relates a packaging object to its child packaging object
		Case To Child	
		Pallet To Child	
> Edit			

When editing, use (double-click) the + icon to make value additions and the X icon to remove any values. Save any setting changes before moving forward.



To continue Packaging Hierarchy Editor setup, see the 'Set Up of the Packaging Hierarchy Editor in Web UI' section in the Web User Interfaces documentation.

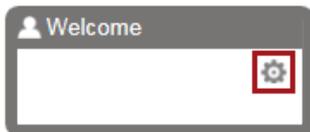
For information about using packaging hierarchy, see the 'How to Use the Packaging Hierarchy Editor' section in the Web User Interfaces documentation.

# Set Up of the Packaging Hierarchy Editor in Web UI

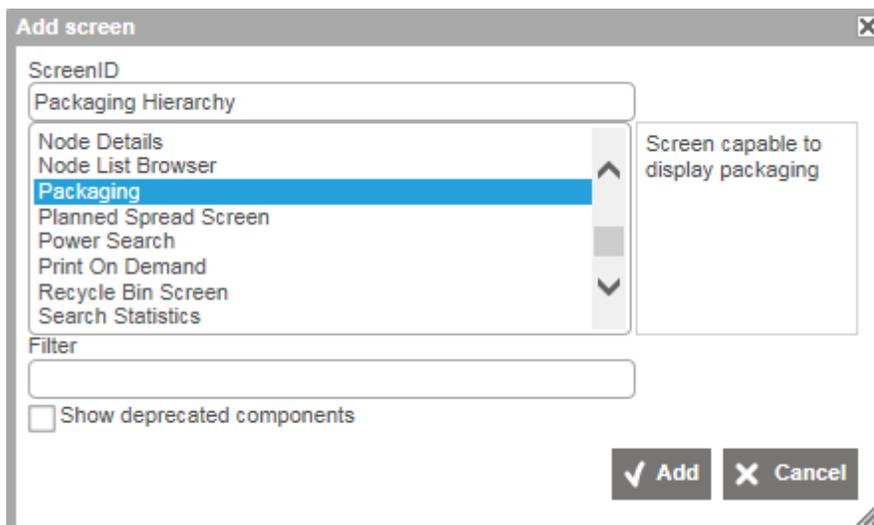
Prior to setting up the Packaging Hierarchy Editor in Web UI, make sure the STEP Workbench setup has been completed. For more information, see the 'Configuration of the Packaging Hierarchy Editor in STEP Workbench' section in the Web User Interfaces documentation.

## Create a new screen

1. Log into the Web UI. User must have privileges to edit Web UI configurations.
2. Click the design mode launch button found on the homepage (in the user widget) or from the corner bar, if configured, on any other Web UI page.



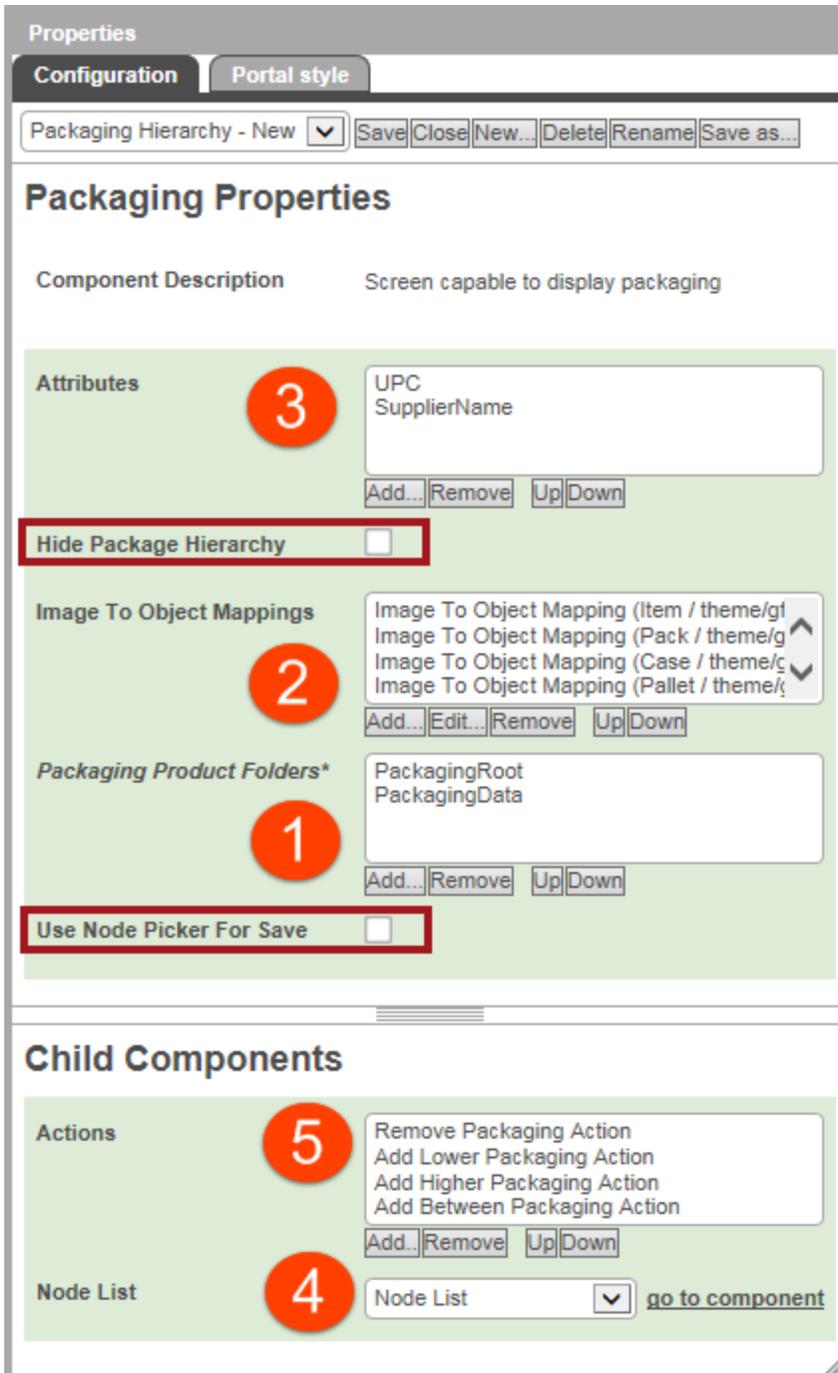
3. To create a new screen, click New and select Packaging to add the Packaging Hierarchy screen. Also, type in a ScreenID. This should be something users can easily identify, if needed, from the list of screens.



## Configure the Packaging Hierarchy Editor Screen

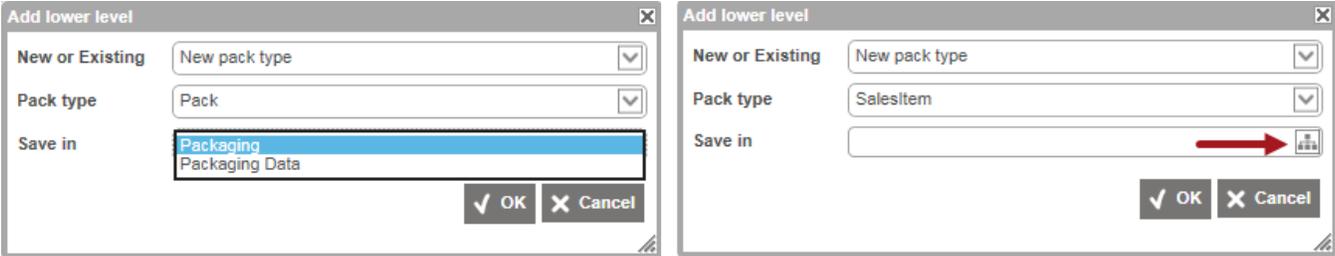
There is a basic default configuration as part of the STEP system, however, some additional setup is required.

If still in the Web UI Designer mode after creating a new screen, go to the following step. Otherwise, log in to Web UI and enter design mode before continuing. Bring up the Packaging Properties for the Packaging Hierarchy ScreenID.

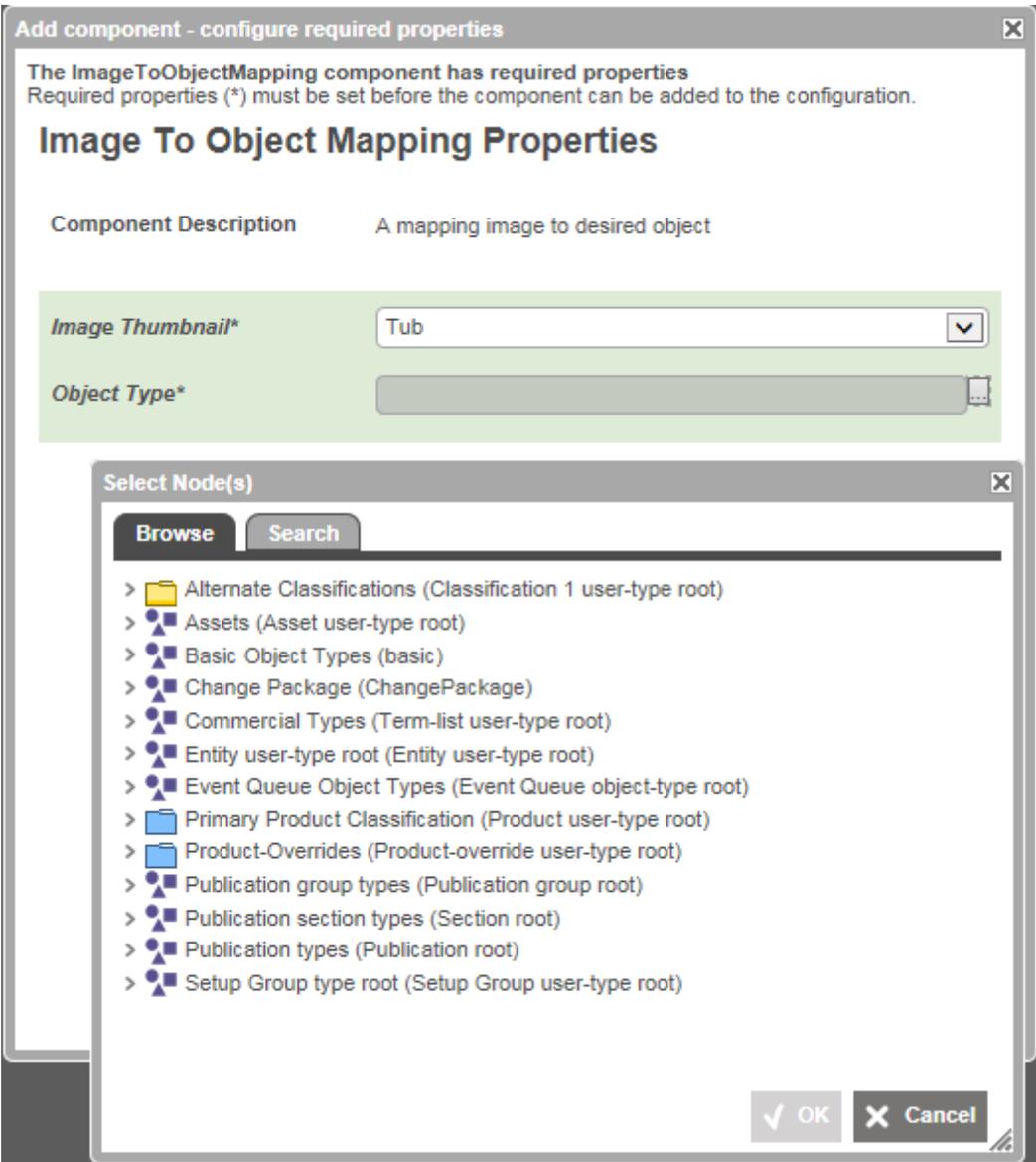


1. Configure the **Packaging Product Folders** parameter to designate the folder or folders where the packaging objects are / will be saved. Folders need to be set up prior to using this Add functionality.

If users should only pick from the configured designated Packaging Product Folders when saving a packaging object, choose to disable / uncheck the **Use Node Picker for Save** parameter. *(If the Node Picker option is enabled / checked, users will be given a node chooser dialog to pick any folder available See the example screenshots that follow.)*



- 2. Configuring **Image To Object Mappings** will connect a predefined icon to a specific packaging object type. These icons are used as representations of the specific packaging types in the Packaging Hierarchy Editor and help distinguish between the available packaging types. Choose to Add an Image to Object Mapping, select from the Image Thumbnail dropdown choices, and select an Object Type. Add, Edit, Remove, or reorganize the mappings as needed.



- If desired, up to two **Attributes** can be configured to show on the graphical elements along with the packaging icon. This makes it possible to display valuable information directly in the diagram, allowing users to quickly get a visual overview of the available Packaging Hierarchies for the selected product.

Example of an icon that includes the packaging type icon and two attribute values:



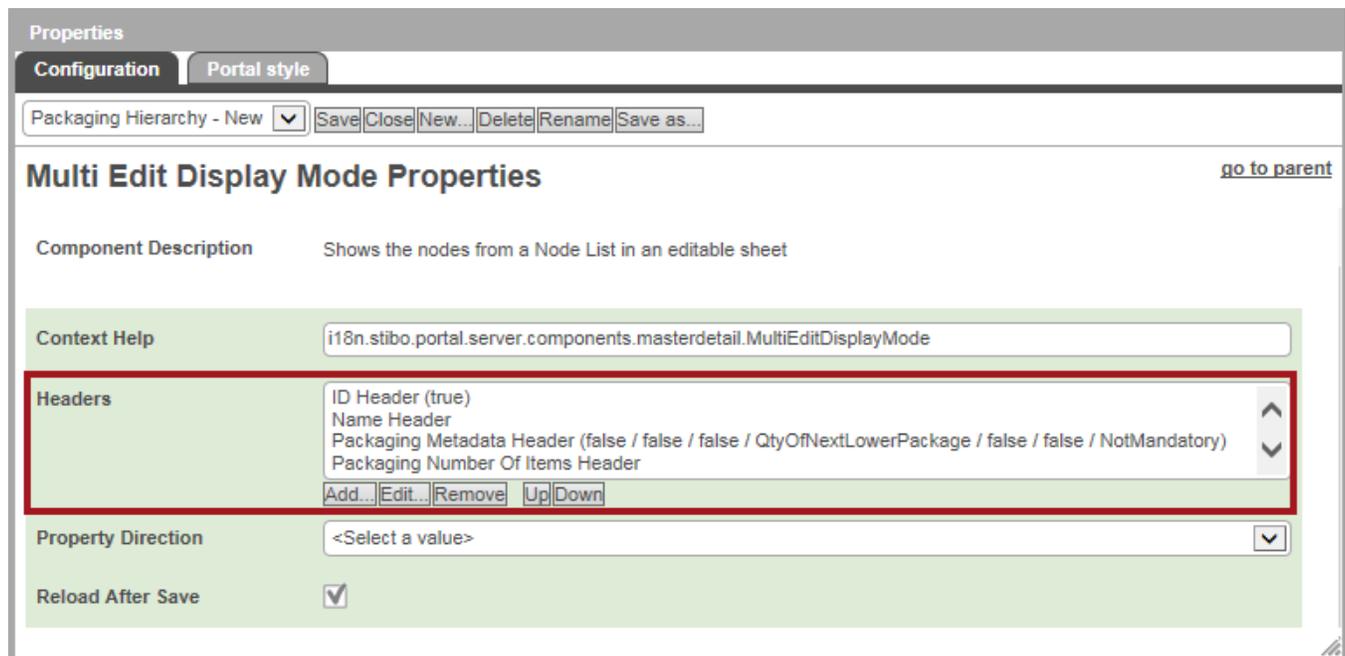

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**Note:** More than two attributes can be added in the Attributes parameter value field on the Packaging Properties screen. However, only the first two attributes will display on the icon.

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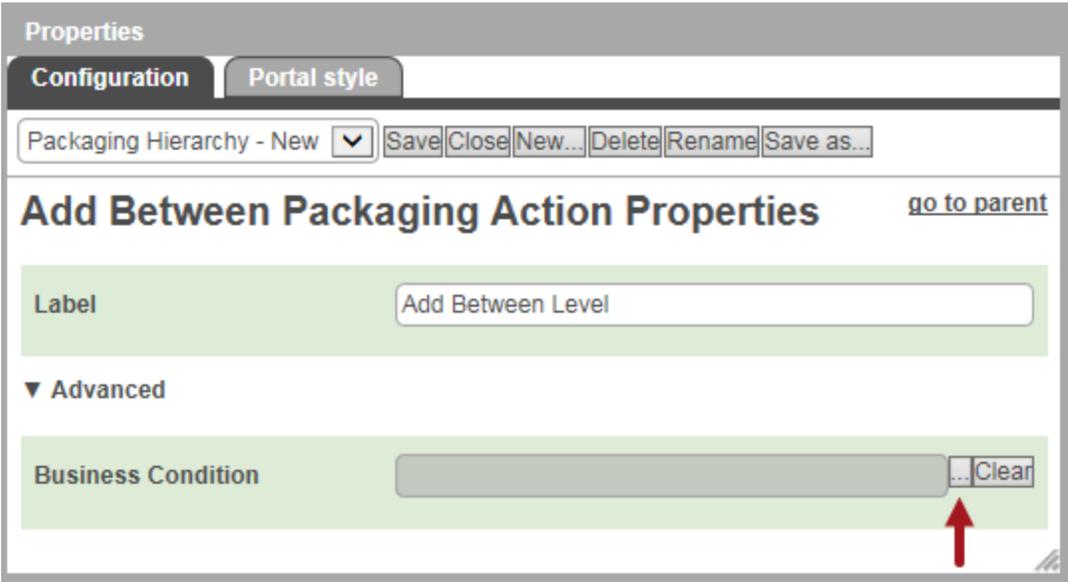
**Hide Package Hierarchy** can be enabled to remove the graphical user interface from display. This may be useful for simple hierarchies where end users do not need to see the graphics and just want to work within the Node List itself.

- When setting up the Packaging Hierarchy Editor Child Components, It is possible to configure the **Node List** component like any other Web UI Node List. However, by default, Multi Edit Display Mode is set as the display mode. The Multi Edit Display Mode is pre-populated with four attribute headers: Name, ID, the quantity attribute used in the Component Model Configuration, and Number Of Items (determined by hierarchy structure and the quantity attribute).



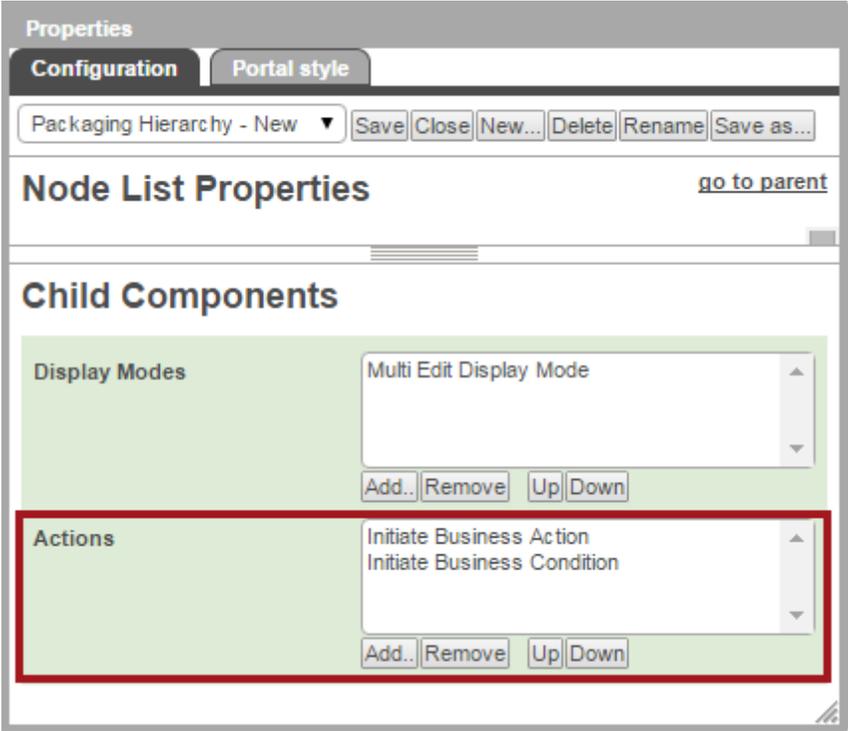
- Also under Child Components, users can set up the following Packaging Hierarchy **Actions** using the Add button: Add Lower Packaging Action, Add Higher Packaging Action, Add Between Packaging Action and Remove Packaging Action.

Also, a **Business Condition** can be added to each action. This option can be found under the Advanced section of each Action Properties screen.



**Validation of packaging hierarchy**

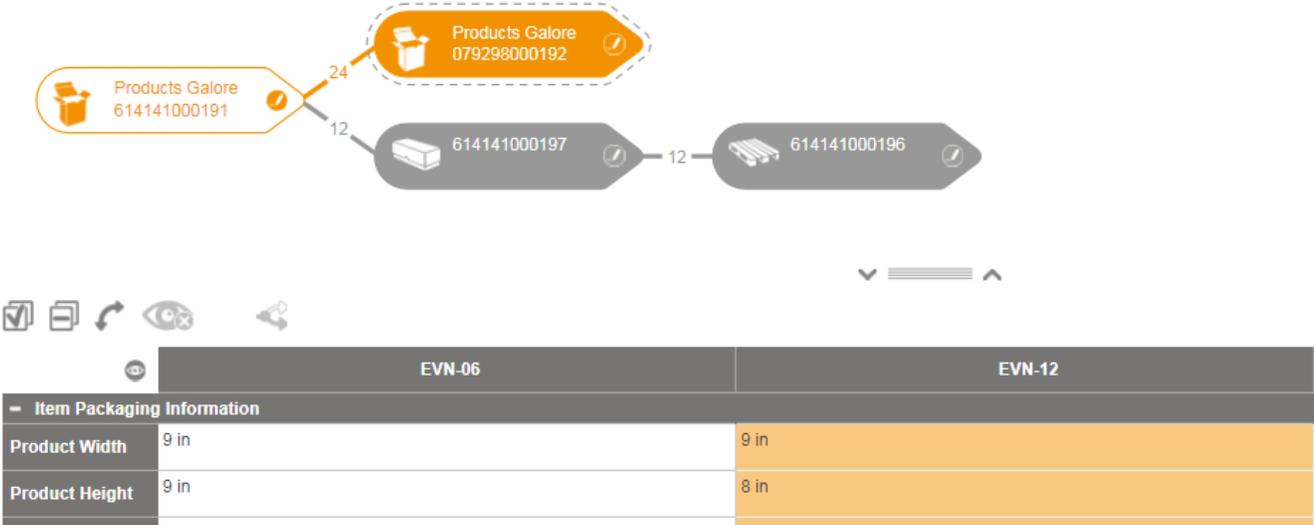
It is possible to run a business rule / business condition to validate the entire Packaging Hierarchy. Business rules and conditions can be added using the Actions component on the Node List Properties accessed from the Packaging Properties screen.



For additional information about using packaging hierarchy, see the 'How to Use the Packaging Hierarchy Editor' section in the Web User Interfaces documentation.

# How to Use the Packaging Hierarchy Editor

When the Packaging Hierarchy Editor has been configured to display in Web UI, it is possible to view and edit packaging hierarchies. When set up and used correctly, the Packaging Hierarchy Editor looks similar to the following screenshot:



Opening the Packaging Hierarchy Editor can be done by selecting an object or a packaging type from the Tree or from on a product details screen.

For the Packaging Hierarchy Editor to display, the packaging hierarchy for a selected object type needs to be configured in the Component Model. For more information about the Component Model configuration, see the 'Configuration of the Packaging Hierarchy Editor in STEP Workbench' section in the Web User Interfaces documentation.



When configured properly the Packaging Hierarchy Editor will display the packaging hierarchy for a selected item or packaging type. If the selected item is not included in a packaging hierarchy, only the selected item will be represented in the Editor as shown below and the table will only have one column:

Item

- Basic Information and references
- Category Information
- Additional Information
- Packaging Hierarchy**



	20803
<b>- Item Packaging Information</b>	
Product Width	7 in
Product Height	5 in

### Create or modify a packaging hierarchy

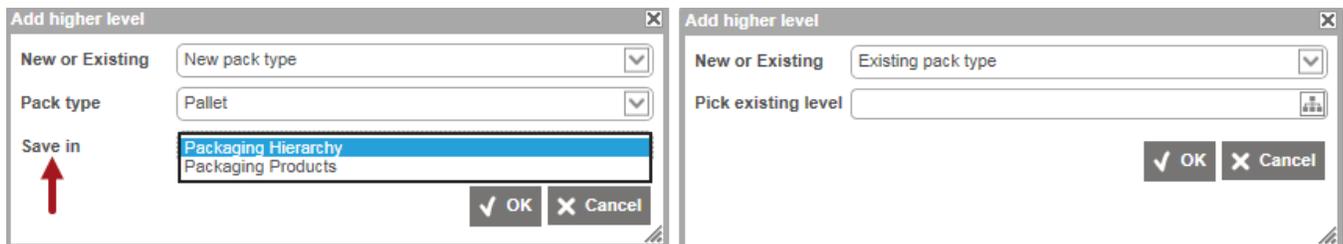
- To create a packaging hierarchy for the selected item or to create an additional hierarchy for the item, the user can click on the edit button on the right side of the icon and select the configured actions. In the example, available actions are: Add lower level, Add higher level, Add between level, or Unlink.
  - When adding levels to a hierarchy, it is best to build the hierarchy upward (e.g., from item to pallet).
  - To use the 'Add level between' feature, the user must be on an orange icon.
  - The lower, higher, and between levels may show differently on an end user's screen depending on what titles these options were configured with.



- When adding a level, a dialog box with the available packaging types will appear. It is only possible to select the valid packaging types that have been set up in the workbench and in a accordance to the references between the packaging types. If a new pack type is chosen, then its possible to select the Packaging Product Folders

folder / folders by using 'Save in' (either by dropdown selection or Node Picker - depending on the configuration set up for Packaging Properties).

If only one folder is configured for the Packaging Product Folders parameter and the Packaging Properties Node Picker option is disabled, the new packaging type will automatically be saved in the designated folder. The 'Save in' option will not display.



**Note:** It is also possible to create new actions for maintaining the Packaging Hierarchy Editor by using the Extension API for full control of the behavior and logic that applies when adding and removing a level to the Packaging Hierarchy. For more information on the Extension API, please see the STEP API documentation.

3. After clicking the OK button, the new level is added to the graphic as well as adding a new level to the packaging hierarchy for the selected item.



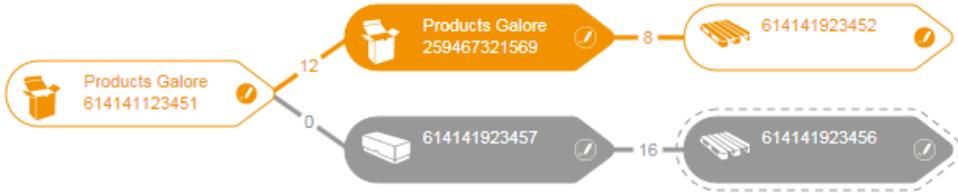
4. Using the 'Add higher level' feature, it is possible to create various types of hierarchy structures. The image below shows an item for which two packaging hierarchies are available:



To select a particular packaging type in the hierarchy, click on the icon in the graphic and the selected packaging type will be highlighted in both the graphical view and in the table.

Packaging Object Details

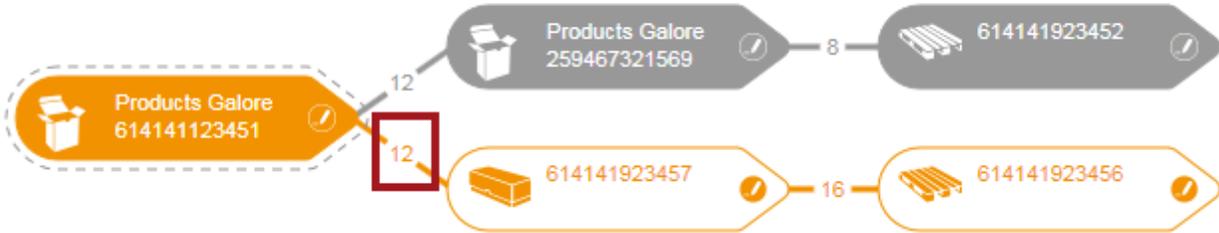
Basic Information | **Packaging Hierarchy**



	20726 (box of 5 pair orange)	21882 (sellable case of 20 boxes of 5 pair orange)
ID	20726	21882
Qty Of Next Lower Package	1	12
Number Of Items	1	12

To edit the quantity (of next lower level package) attribute, click on the associated cell in the row / column. It will then be possible to change any existing value or enter a new value for that cell. Remember to save any changes. Any updated or added values will be changed in the graphical view and Number Of Items will recalculate based on the new quantity.

	20726 (box of 5 pair orange)	Gloveworks case (Bx of 5 pair orange)
ID	20726	21875
Qty Of Next Lower Package	1	12
Number Of Items	1	12



**Note:** Number Of Items is a system-calculated number based on the quantity attribute and the hierarchy. Users cannot edit these values.

**Collapsible splitter feature**

The individual panels on the Packaging Hierarchy Editor screen are collapsible and expandable through the use of a collapsible splitter feature.

When the screen is configured with a horizontal split panel, a drag handle splits up the panels / components on the screen. The drag handle displays a down arrowhead to the left and an up arrowhead to the right.

	EVN-06	Evian case (6 packs)	Evian pallet
ID	<u>8083</u>	<u>20454</u>	<u>22797</u>
Qty Of Next Lower Package	1	12	12
Number Of Items	1	12	144

Clicking the up arrowhead removes the main component (graphical user interface) from display, allowing more screen space to focus on the Node List. This is useful if the user wants to focus on entering data in the table and no longer needs to see the packaging diagram to do so but doesn't want to hide the graphical user interface through the Packing Properties settings.

Clicking the down arrowhead returns the hidden component back to the screen display.

Similarly, if the user first clicks the down arrowhead, the child component is hidden from display so the user can focus on the packaging diagram.

For information about setting up the Packaging Hierarchy Editor, see the 'Configuration of the Packaging Hierarchy Editor in STEP Workbench' and the 'Set Up of the Packaging Hierarchy Editor in Web UI' sections in the Web User Interfaces documentation.

# Parameterized Business Actions in Web UI

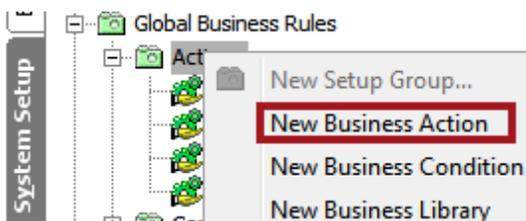
The option to configure and associate a business action with a number of referenced parameters allows users to provide their own values when running a business action in the Web UI. This not only gives the users a better sense of control, as the changes entailed by running a business action become much more apparent, but also provides a more dynamic and useable setup. The same business action can be reused for a variety of similar tasks without the need for reconfiguration.

## Configuration of Parameterized Business Actions in STEP Workbench

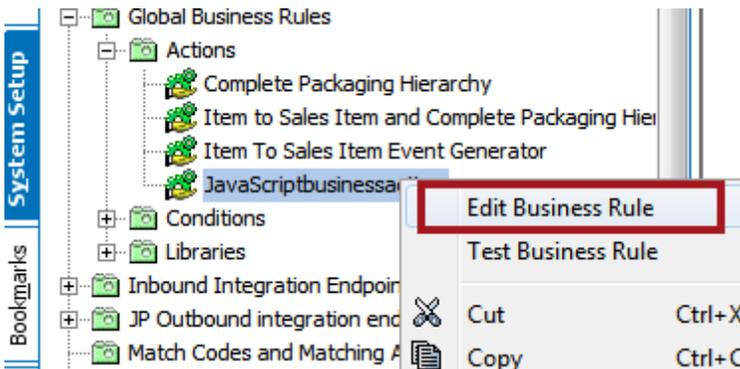
### 1. Creating a JavaScript business action with binds

Creating a JavaScript business action with binds is done within the STEP Workbench under System Setup.

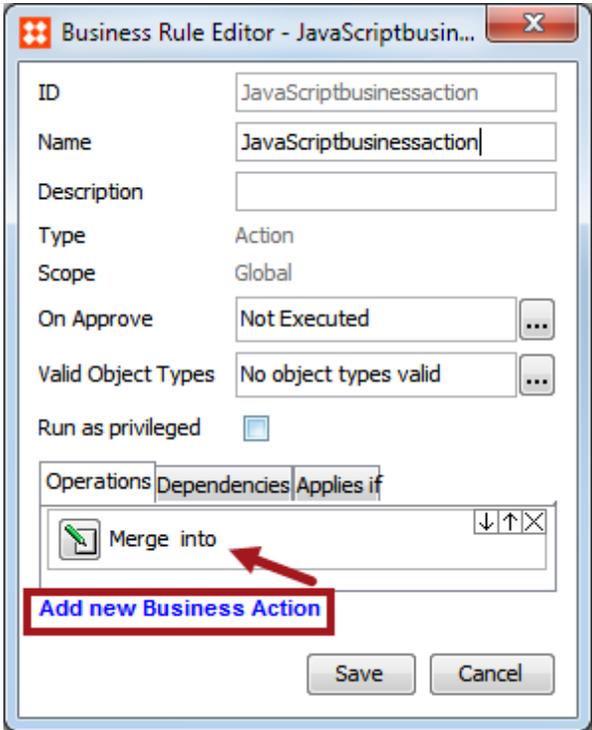
1. To add the JavaScript Business rule, go to the Global Business Rules folder and under the folder Action, right click and select **New Business Rule**.



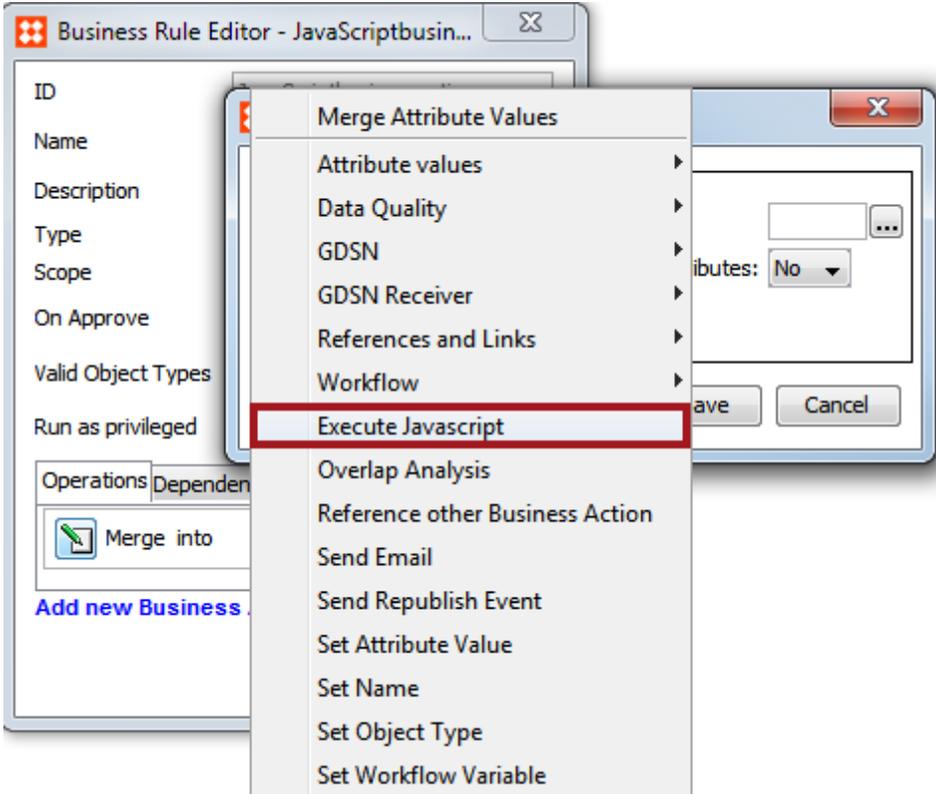
2. Label it JavaScript Business and press create.
3. Once it is created, right click on it and select Edit Business Rule.



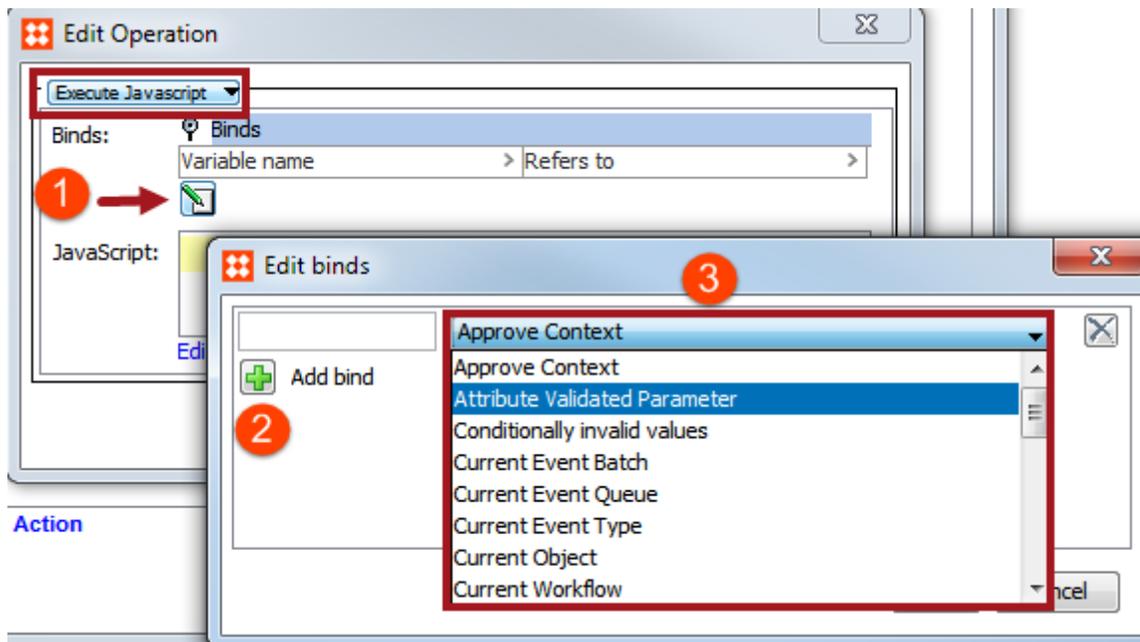
4. In the field that opens, select **Add New Business** and the **Merge into** icon (**Edit bind** icon) will appear in the empty box above.



5. Click on the Edit bind icon and select Execute JavaScript from the top left hand drop down menu.

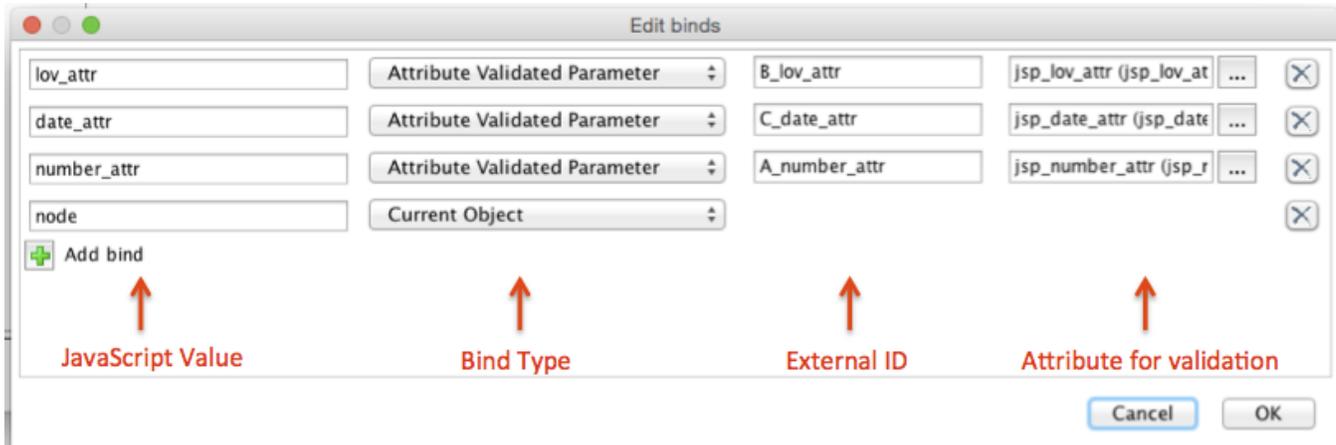


6. In the next window, select the **Edit bind** icon again and in the window that pops up, click **Add bind**. This will populate a drop down menu. In the menu, select **Attribute Validated Parameter** and a total of four columns should be displayed:

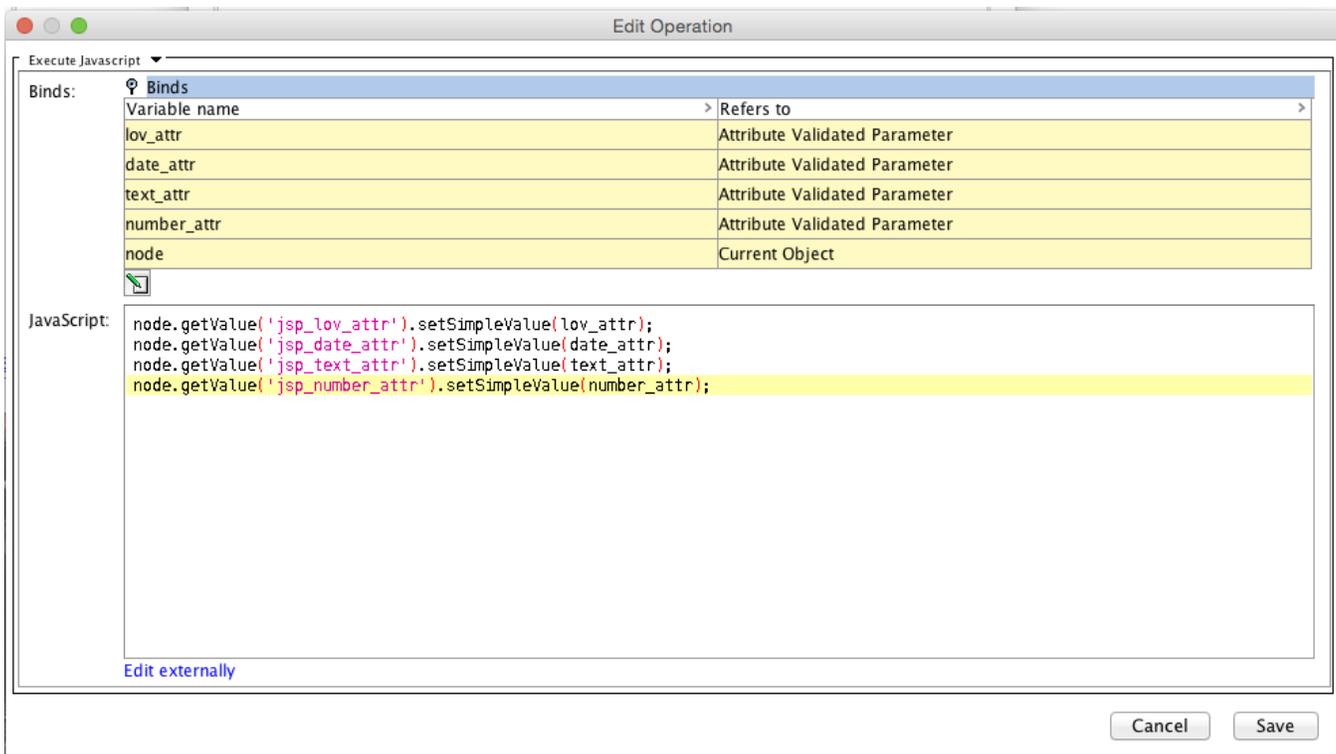


- The first column (JavaScript value) should be populated with the name of the parameter that should be executed (\*required)
- Second column (Bind Type) defines the bind type - here 'Attribute Validated Parameter' (\*required)
- Third column (External ID) is used for entering the external ID of the parameter which will be used when embedding the business action in a bulk update configuration (\*required)
- Fourth column (Attribute for validation) contains the attribute, and hereby the validation base type, that the parameter value will be validated as when used in the Web UI. If the field is left empty the value will be validated as text. It is possible to select between the validation base types: Text, Number, Date, or List of Values. For example, the parameter of a business rule that is bound to a date validated attribute will display a date picker, while LOV options will display as a drop down.

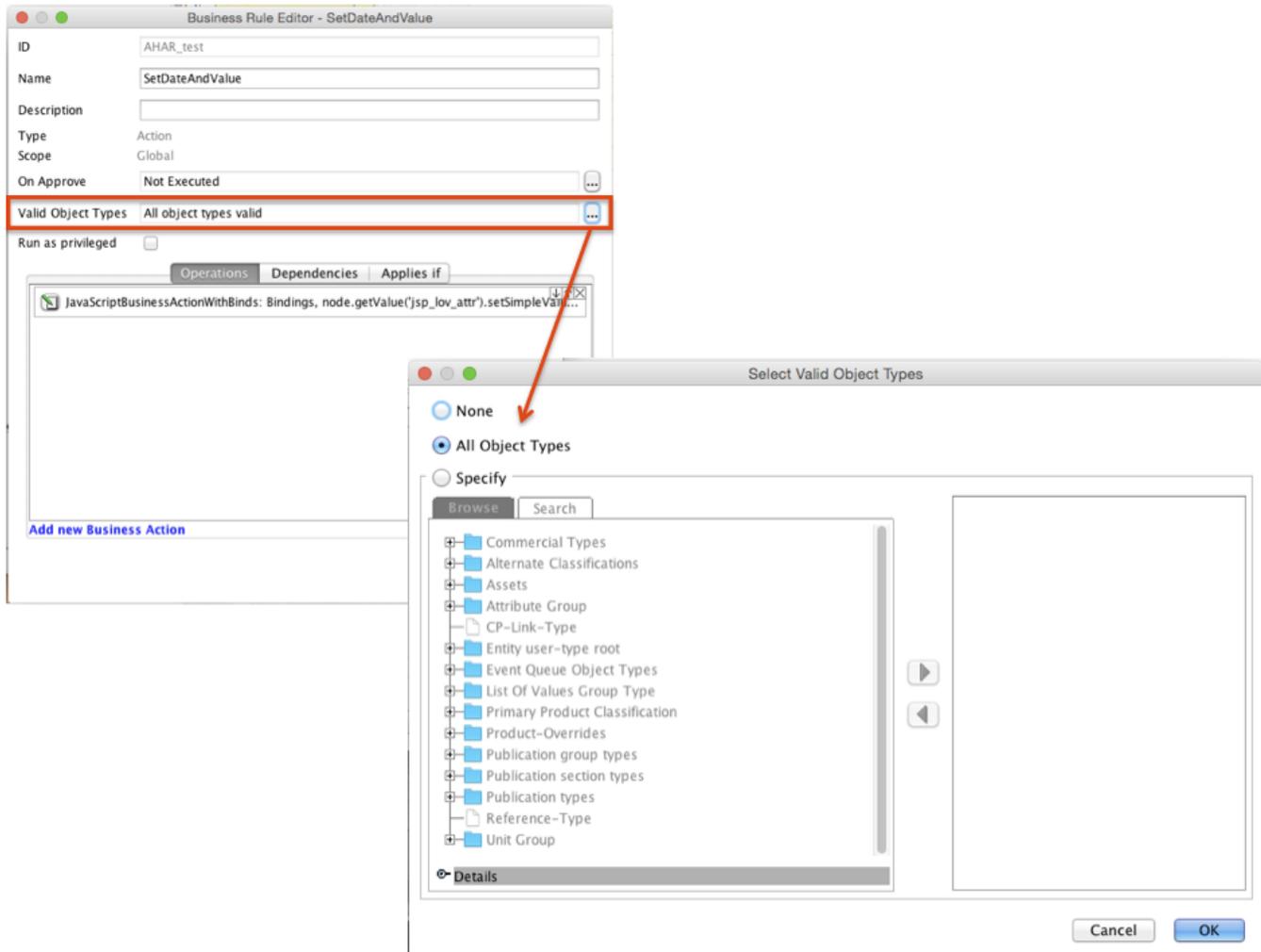
When the binds have been configured, it is important also to define the node that should be changed, e.g. 'Current Object' as shown in the example.



After configuring the binds, write the JavaScript that refers the configured binds.



When the business action has been configured, make sure to define the validity of the business action (Valid Object Types). It is possible to configure the business action so it is valid for all object types or only a subset of object types.

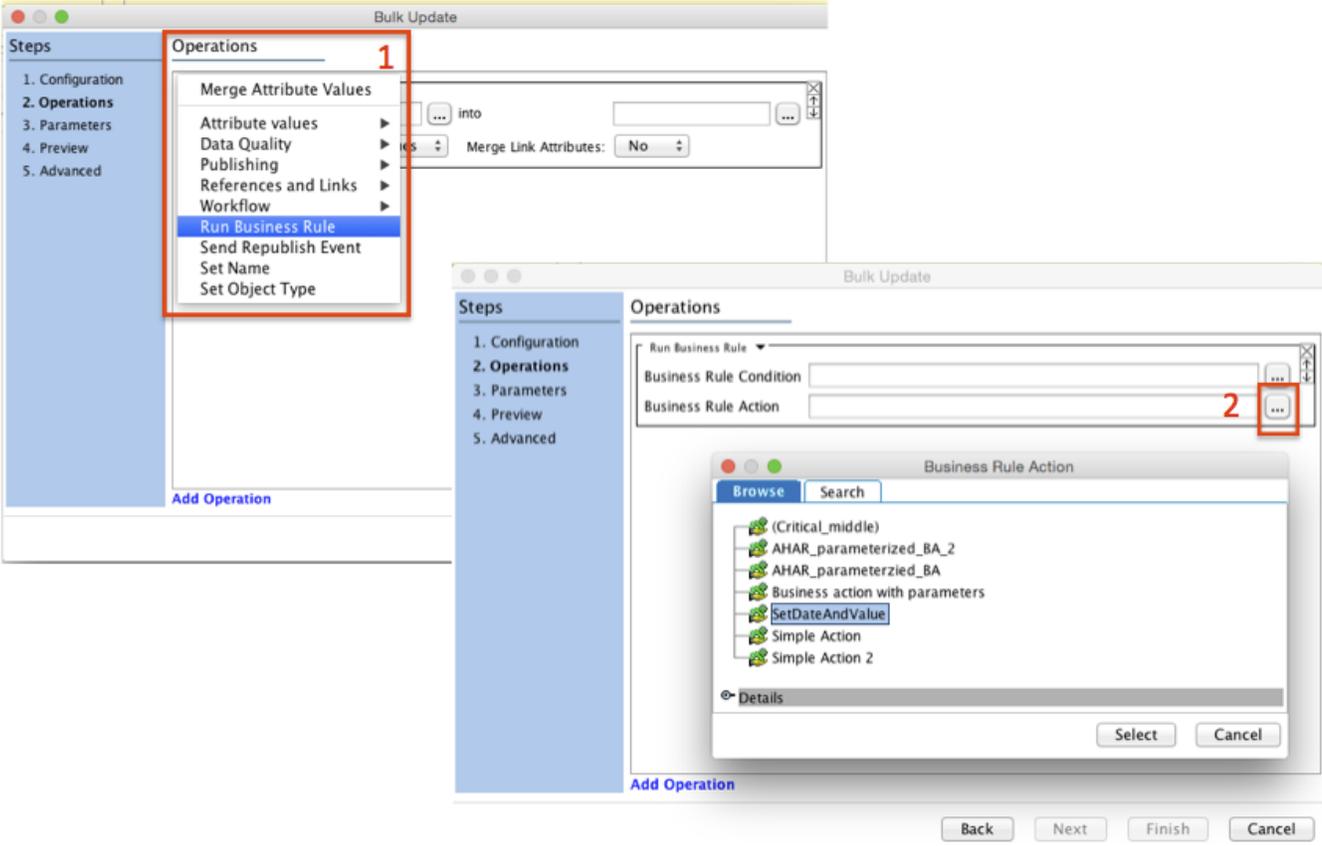


## 2. Embedding the business action in a bulk update configuration

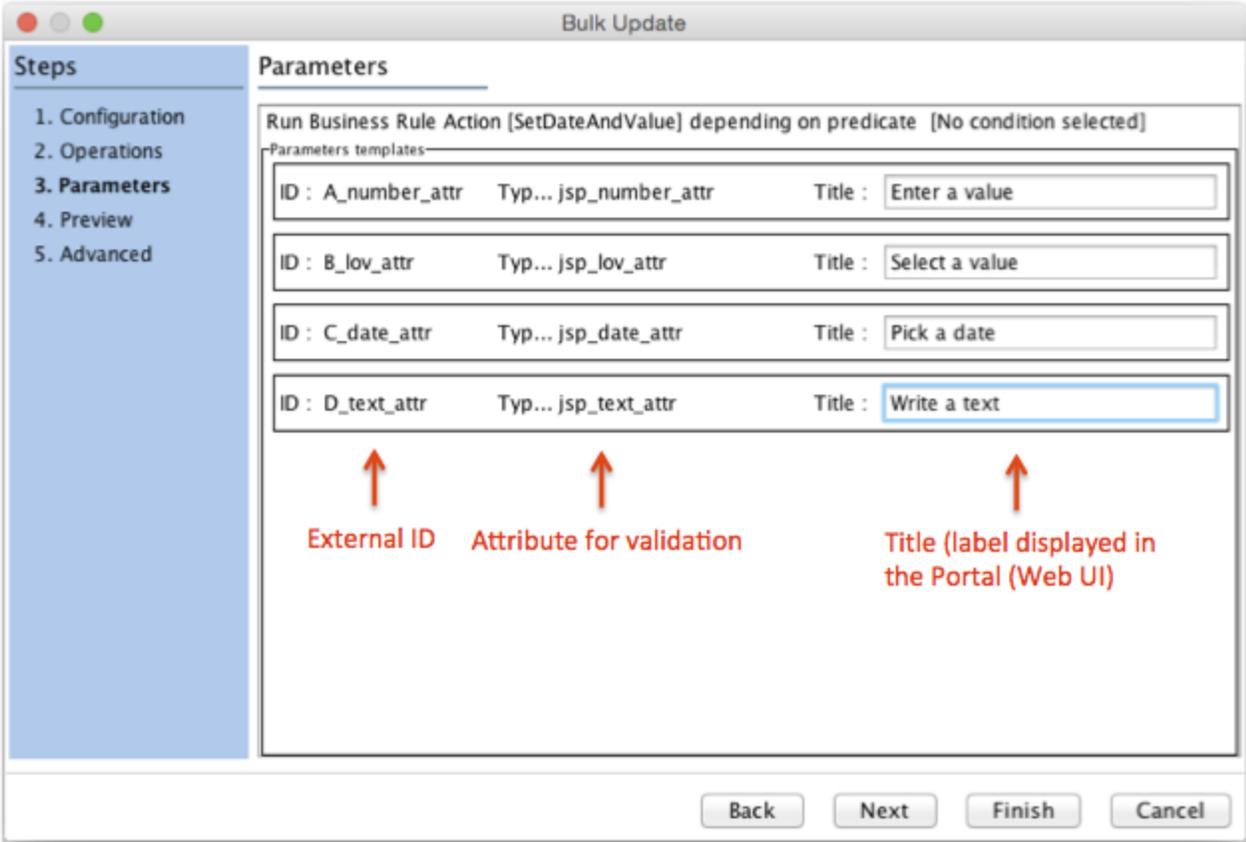
After configuring the business action, it must be embedded into a bulk update configuration to work as a parameterized business action in the Web UI. To embed the business action, open the Run Bulk Update wizard from the File menu in the STEP Workbench.

In the first step of the wizard, select the 'Create New Configuration', if this is a new bulk update configuration being created. If the purpose is to reconfigure an existing bulk update configuration, select 'Use Existing Configuration'.

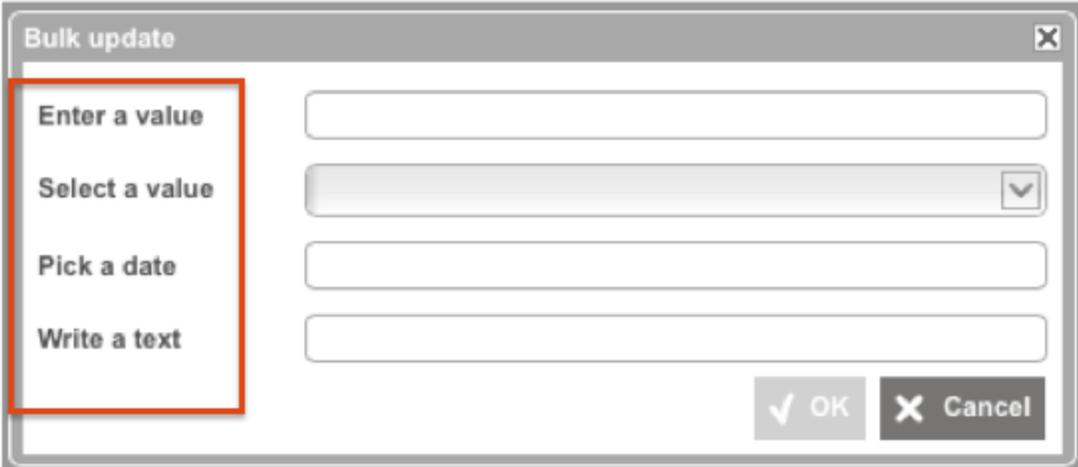
In the second step, select the operation 'Run Business Rule'. Next, find and select the business action configured with bindings (see section above for configuration of business action with bindings).



In the third step of the bulk update wizard, it is possible to enter a title for each of the configured parameters. The title is displayed as a label in the dialog when running the bulk update in the Web UI.



**Bulk update dialog in the Portal (Web UI)**



In the fifth and final step of the wizard (Advanced), the configuration is saved (Save Configuration) and the valid object types are defined. The configuration will not be shown in the Web UI if the selected object is not valid.

Note the following details:

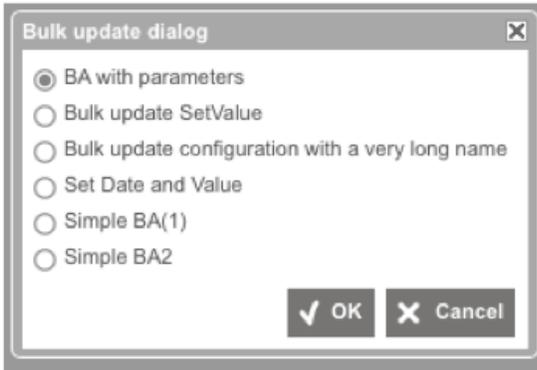
- To be able to perform bulk updates, the user must have privileges to maintain bulk updates, view classifications, view attributes, and create collections.
- Use of this functionality is supported for JavaScript business actions only.
- Configuration of business actions and bulk update configurations must be done within the STEP Workbench. Additionally, the business action must be referenced and set up via a bulk update configuration using the 'Run Business Rule' operation.
- The 'Test Business Rule' functionality in the STEP Workbench is not supported for parameterized business actions.
- For ease of maintenance, it is recommended that only a single business action should be used in each bulk update configuration.

## Making Parameterized Business Actions Available in the Web UI

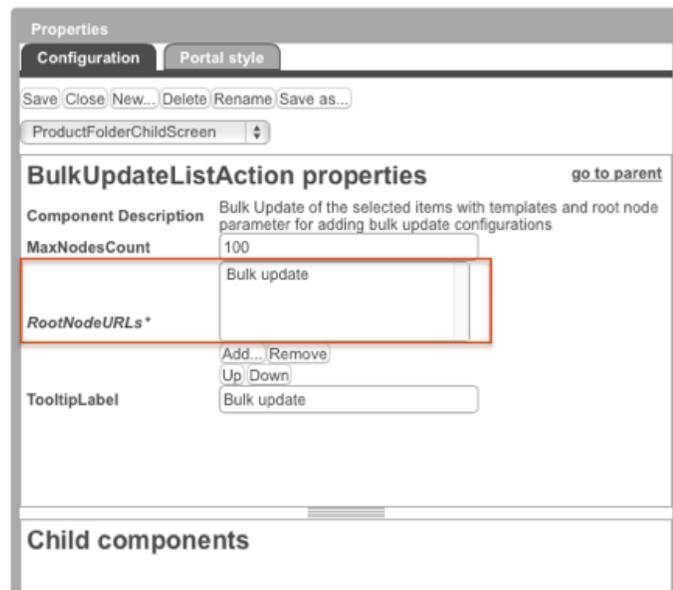
There are three components in the Web UI that can be used to run bulk updates (including bulk updates configurations that embed parameterized business actions).

## 1) BulkUpdateList Action

### BulkUpdateListAction in the user interface



### BulkUpdateListAction in the designer

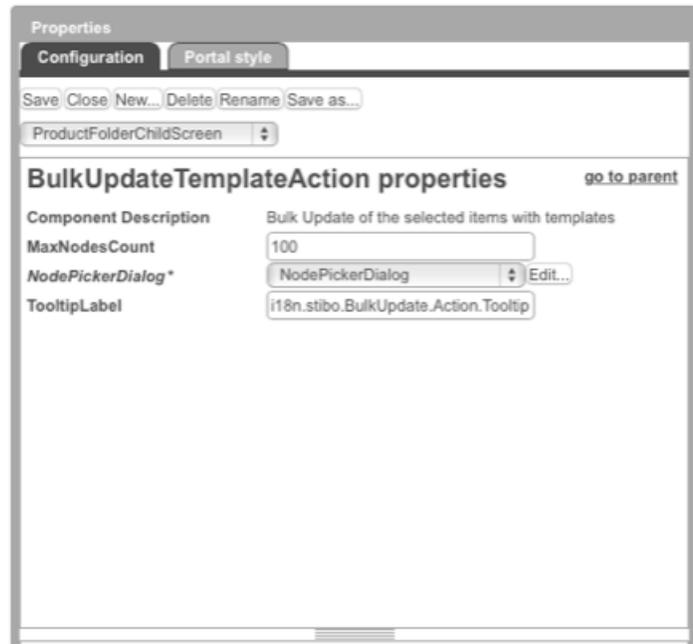


The Bulk Update List Action is a toolbar action that can be used from a NodeList. The action is configured by pointing at one or multiple root nodes where the bulk update configurations are saved (RootNodesURIs). All valid bulk update configurations will then be selectable in the bulk update dialog. If more than ten bulk update configurations are available, the list will display with a scroll bar.

If the user selects a number of objects that exceeds the defined number of allowed objects (MaxNodesCount), the user will get a warning stating that 'Too many nodes are selected, bulk update cannot be performed'.

## 2) BulkUpdateTemplateAction

### BulkUpdateTemplate in the designer



### BulkUpdateTemplate in the user interface

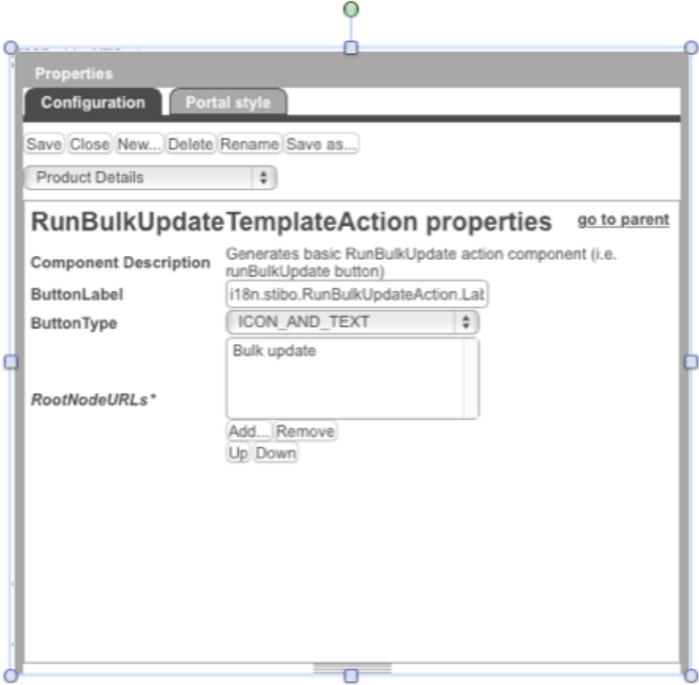
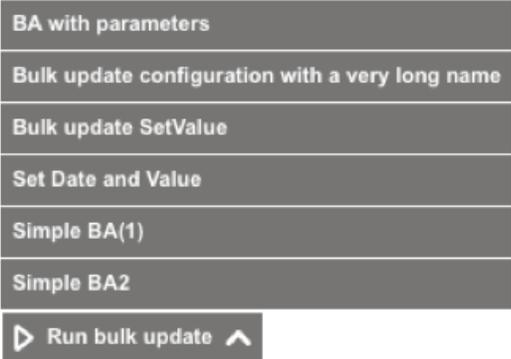


The Bulk Update Template action is a toolbar action to be used on a NodeList. The action has parameters in the Designer for MaxNodesCount (maximum number of objects that can be selected at a time) and configuration of the NodePicker dialog.

If the user selects a number of objects that exceeds the defined number of allowed objects (MaxNodesCount), the user will get a warning stating that 'Too many nodes are selected, bulk update cannot be performed'.

### 3) RunBulkUpdateTemplateAction

RunBulkUpdateTemplateAction in the user interface



RunBulkUpdateTemplateAction in the designer

The Run Bulk Update Template action is similar to the Bulk Update List Action, but can be placed on a NodeDetails screen. When running bulk update on a single object, then the update will run in real time and not as a background process. If more than ten bulk updates are available the drop up list will be replaced by a dialog with radio buttons.

## Potential Duplicates List

When making use of STEP's simple matching capabilities for deduplication, where the matching threshold value is set so that all matches higher than the threshold are seen as potential duplicates, Web UI end users can see a list of potential duplicates so that they can confirm or reject the potential duplicates. This is similar to the functionality offered in the STEP Workbench on the Matching tab for an object that a matching algorithm has been run on.



	Score	Matching Algorithm	Name	Object Type	Phone	Email
Sean Duke	-	-	Sean Duke	Subscriber	4923684295	sean.duke@priceless.co.uk
Sean Duke	94.771	I Case B Matching Algorithm DT	Sean Duke	Subscriber	4923684295	sedu@boom.com

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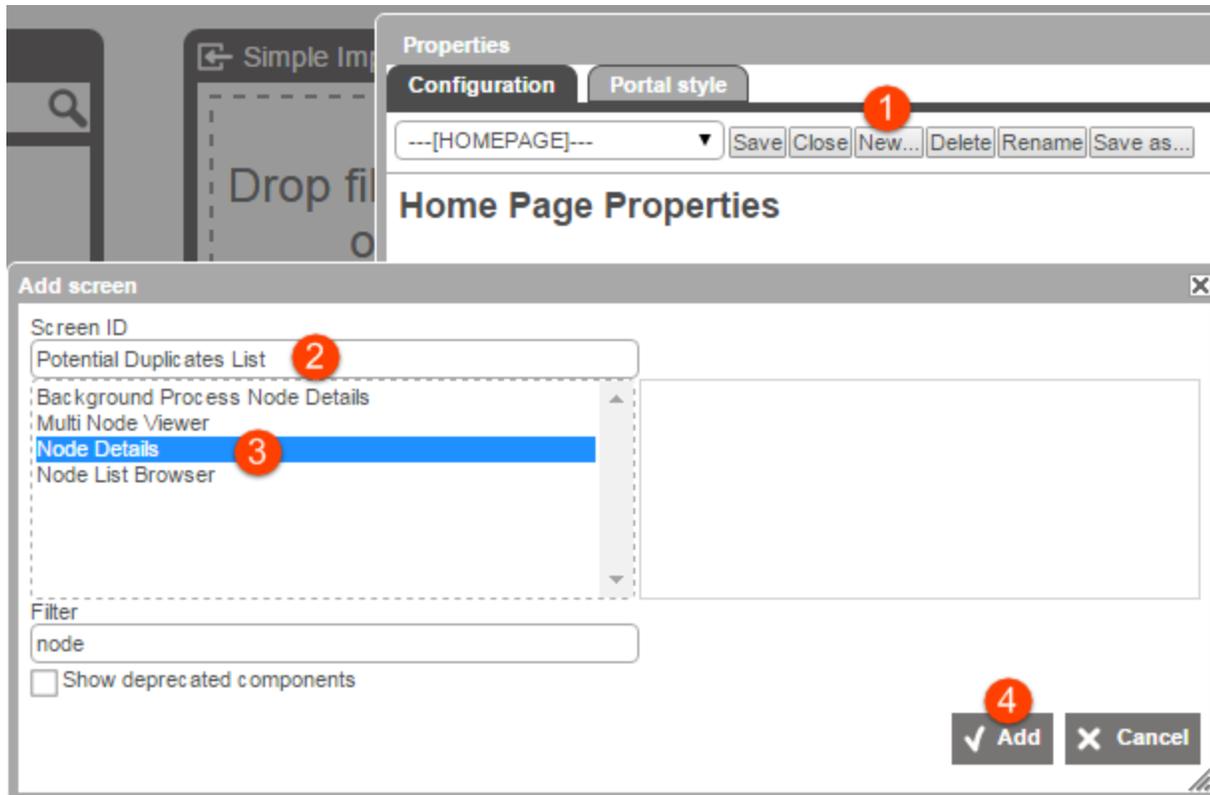
**Note:** As the Potential Duplicates List component uses a Matching Score and Algorithm to identify potential duplicates, these must have been previously created in the STEP Workbench. For more information, see the 'About Match Codes and Matching Algorithms' section of the Data Quality documentation.

---

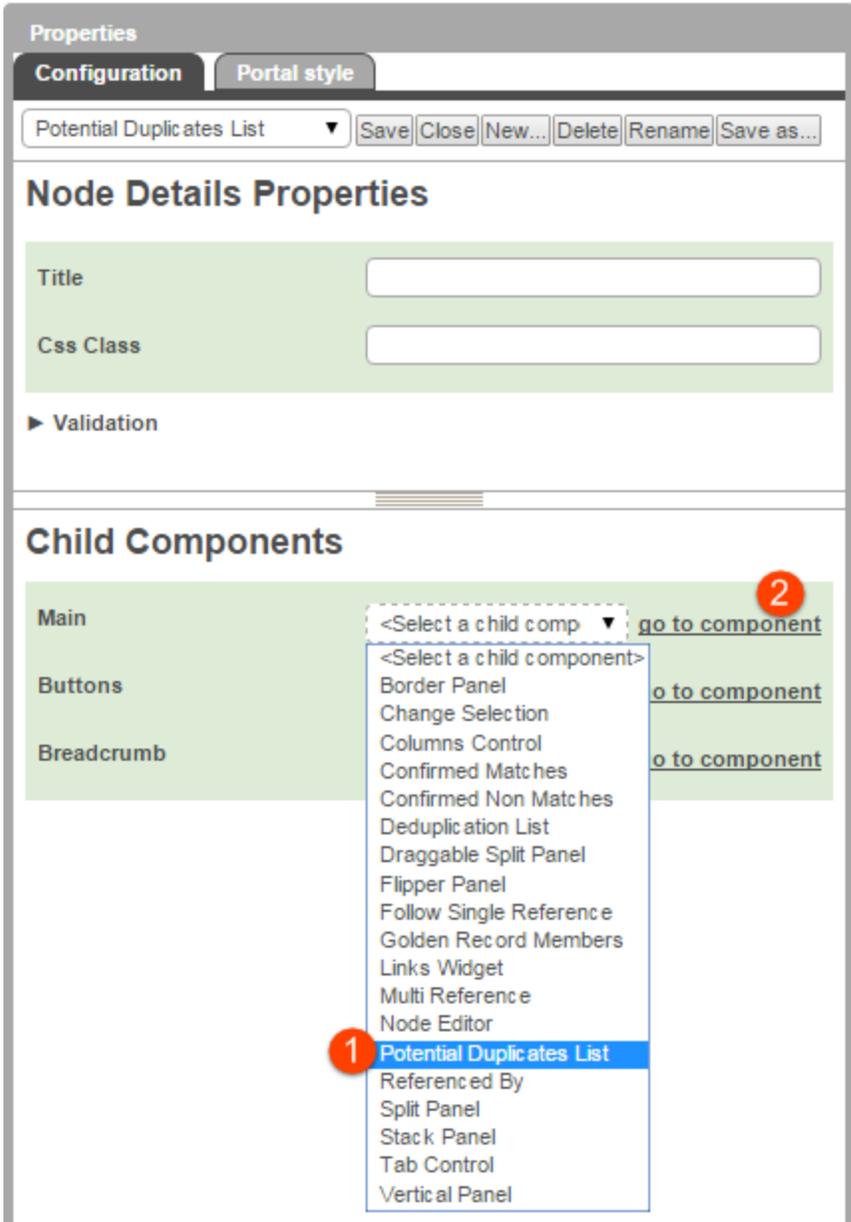
### Configuring the Deduplication Table

The Potential Duplicates List component can be added to any Node Details or Tab Control / Tab Page component. The following steps show an example of how to configure the component using a Node Details screen.

1. In the Web UI designer, create a new screen, assign a screen ID, select the Node Details screen type, and click **Add**.



2. Upon clicking Add, the newly created screen is opened. Go to **Child Components > Main** and select **Potential Duplicates List** from the drop down menu. Then click the **go to component** link.



3. Configure the component following standard table configuration principles. An example is shown below. Specific to the Potential Duplicates list, a Matching Algorithm can be selected which determines how potential duplicates are identified. If no selection is made, results from all relevant algorithms are shown. In addition, the Confirm / Reject actions should be added. Upon completion of the configuration, save and close the Web UI Designer. Note that the Score and Matching Algorithm headers are included as headers in the component by default. Any other headers added will appear after these in the table.

Properties (edited)

Configuration Portal style

Potential Duplicates List Save Close New... Delete Rename Save as...

### Potential Duplicates List Properties [go to parent](#)

Component Description A component for displaying a tab with a list of possible duplicates listview

Dimensions Compare Display Mode Dimension Edit...

Event

Headers Name Header Object Type Header Attribute Value Header (false / false / false / Attribute Value Header (false / false / false / Add... Edit... Remove Up Down

Hide Selection Buttons

**Matching Algorithm** PersonMatchAlgorithm ... Clear

Property Direction HORIZONTAL

Show Group Headers

---

### Child Components

**Actions** Confirm Duplicate From Grid Action Reject Duplicate From Grid Action Add... Remove Up Down

4. The screen must then be mapped to display as needed, per standard Web UI screen mapping capabilities. The 'Hide Equal' and 'Mark Different' actions will automatically appear alongside any other actions configured. For more information, see the **Comparing Data Using Hide Equal and Mark Different** section of the **Web User Interfaces / Using a Web UI** documentation.

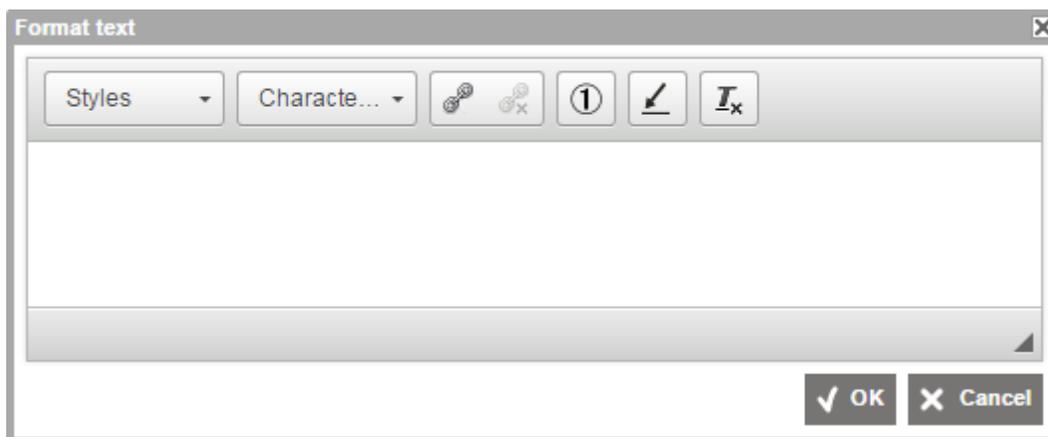
## Rich Text Editor

Rich text editing allows users to enter and edit text within a web browser. Attribute value text-editing options include adding character formatting plus options for adding hyperlinks, footnotes, and inline references. Using a Rich Text Editor (RTE) when editing attribute values within a Node Editor eliminates the need for users to be familiar with any special coding and web markup languages such as XML. Another benefit is that users can see what the text will look like immediately within the editor window.

Rich text editing is available for attributes with text and numeric text validation base types. The Rich Text Editor icon displays when RTE is enabled via the Enable Tag Conversion parameter within the Attribute Value properties and the Enable Tag Conversion parameter or Rich Text Editing parameter within the Attribute Value Group component properties.

### Rich Text Editor Icon

Users can identify when an attribute value field is using RTE based on the icon in the right side of the field. Simply click the edit icon and the 'Format text' dialog appears.



Once an attribute field has any formatting done to the text, it becomes locked (meaning that you cannot just click in the field to edit it). Clicking the RTE icon is the only way to make additional edits to the text.

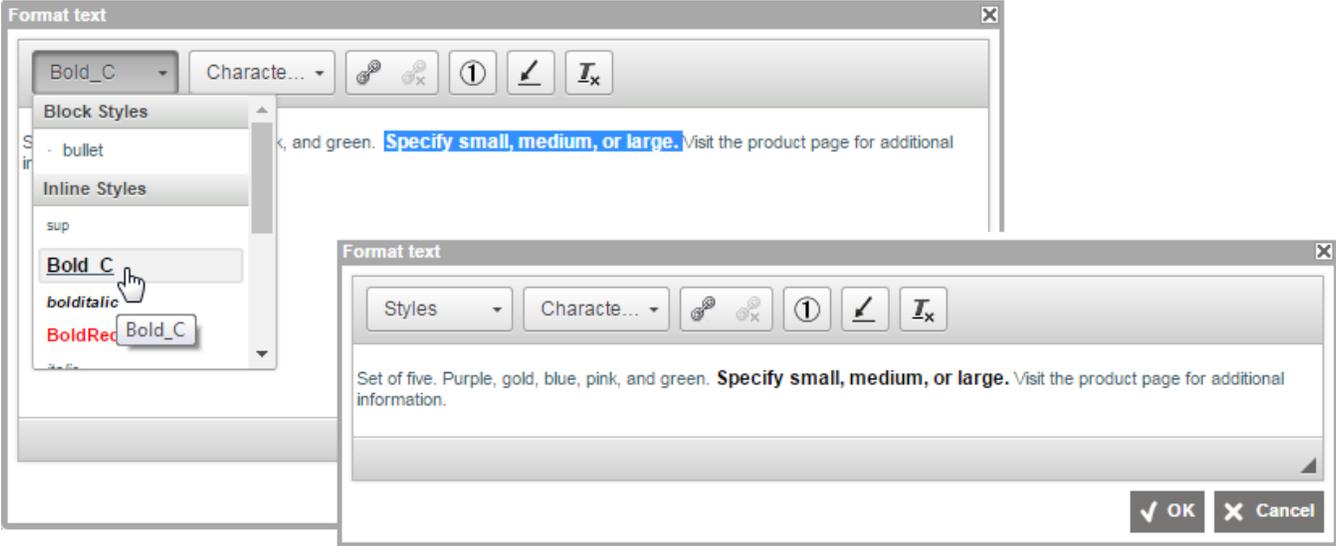
### Format Text Options

The options shown in the 'Format text' dialog, and their descriptions, are listed below. The text format options are important since they will apply, if applicable, when fed into other systems (for example, when used as website text or within printed publications).

The headings below correspond with the hover text that displays when you mouse over each of the format dropdowns or icons at the top of the 'Format text' dialog.

### Formatting Styles

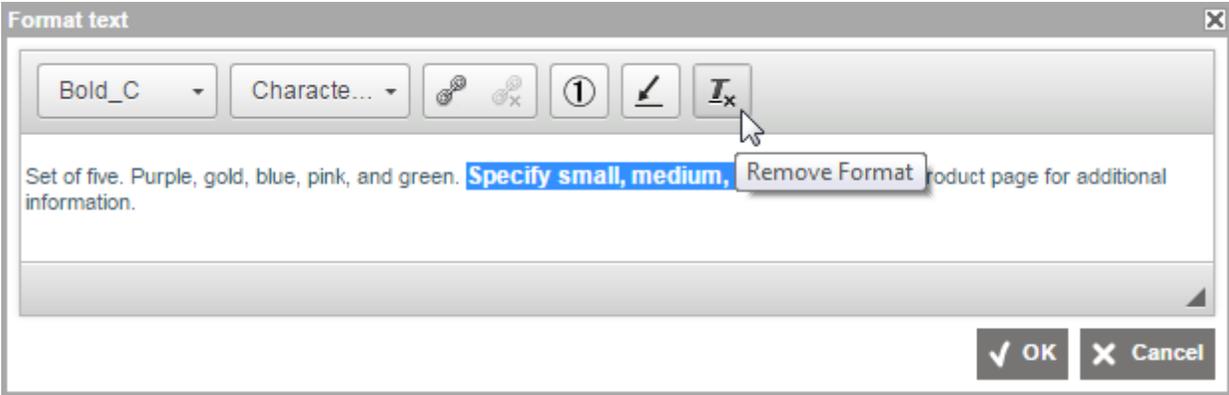
To apply a style, you must first select the text to apply it to. Then make a selection via the **Styles** dropdown.



Note that a set of style tags may already exist within your STEP system. Additional styles can be created in the STEP Workbench and will then be available in the **Styles** dropdown list. For more information on style tags, see the **Style Tags** section of the **System Setup / STEP Super User Guide** documentation.

### Remove Format

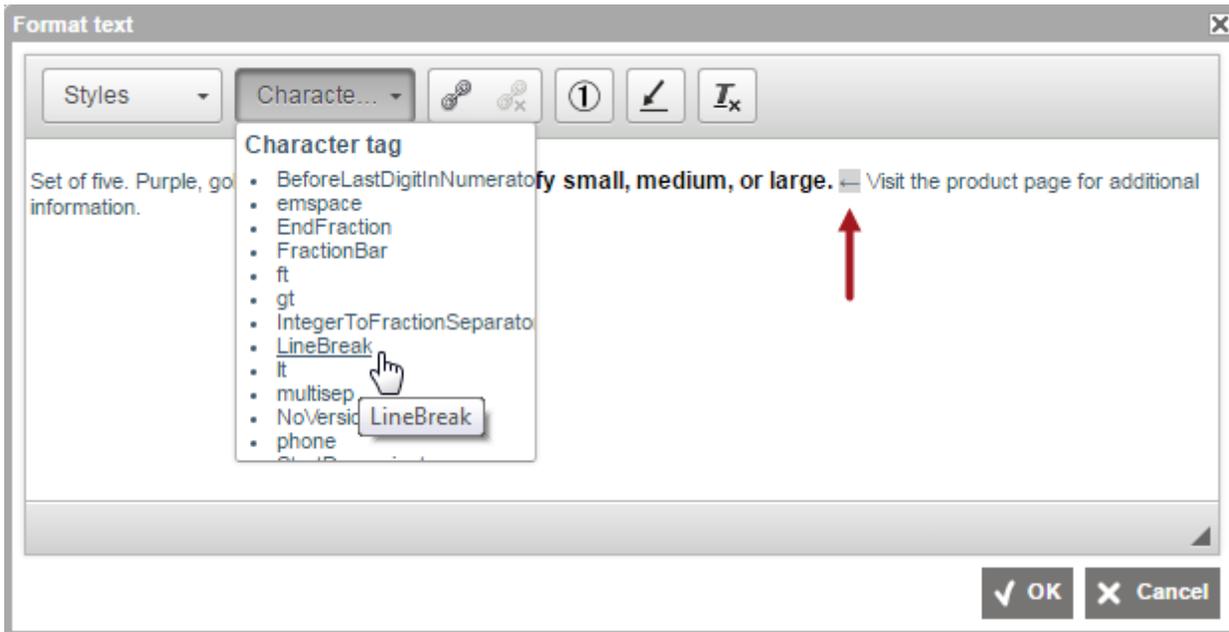
To delete a style and go back to the default text (no style), select the specific word or phrase that has a style applied to it, then click the 'Remove Format' icon. To remove character styles from the entire body of text, select it all before removing the formatting.



### Character tag

To insert a character tag, place your cursor within the text exactly in the spot where you want the character tag to display. Then, click the **Character tag** dropdown and make a selection. Character tags appear with a gray background within the 'Format text' dialog and within the attribute value field.

No special icon is required to delete a character tag. Just delete from the text using standard procedures (Delete or Backspace).

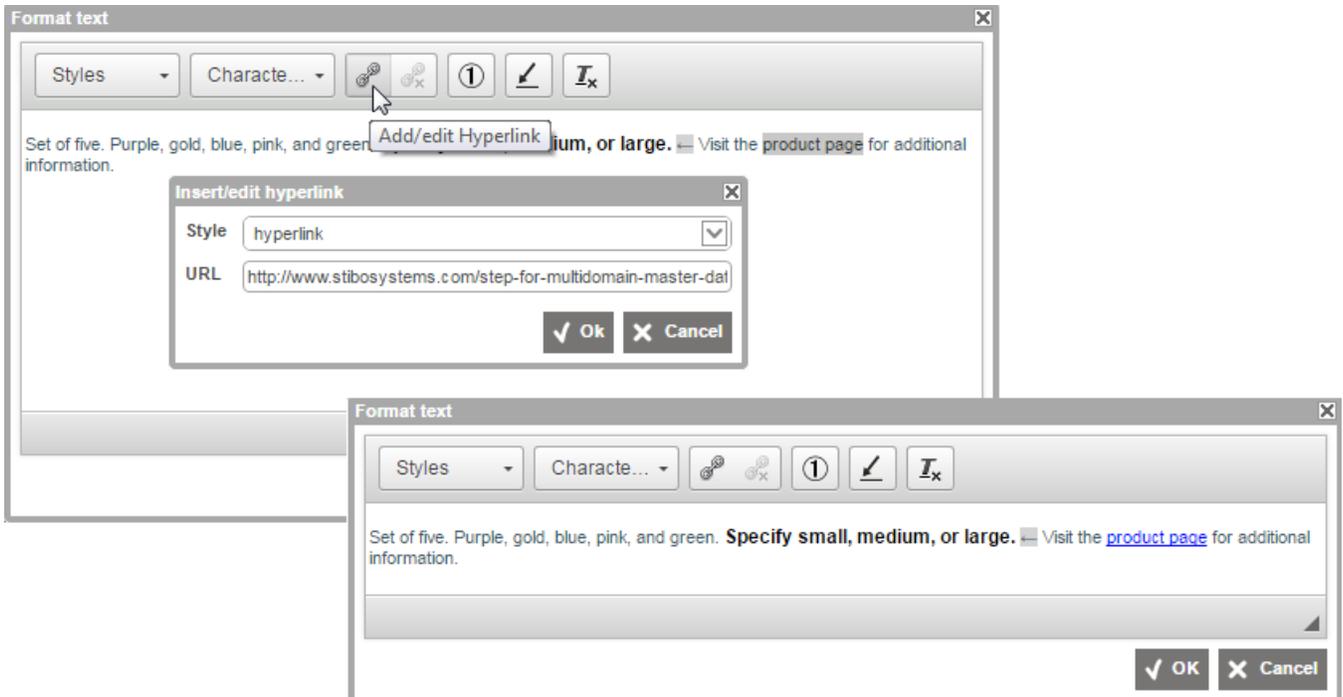


Note that some character tags may already exist. Additional character tags can be created in the STEP Workbench and will also be available in the **Character tag** dropdown list within Web UI. For more information on character tags, see the **Character Tags** section of the **System Setup / STEP Super User Guide** documentation.

## Add/edit Hyperlink

Hyperlinks are added to text similar to how styles are applied. Select the text you want to make into a hyperlink, type the URL in the 'Insert/edit hyperlink' dialog, and click Ok.

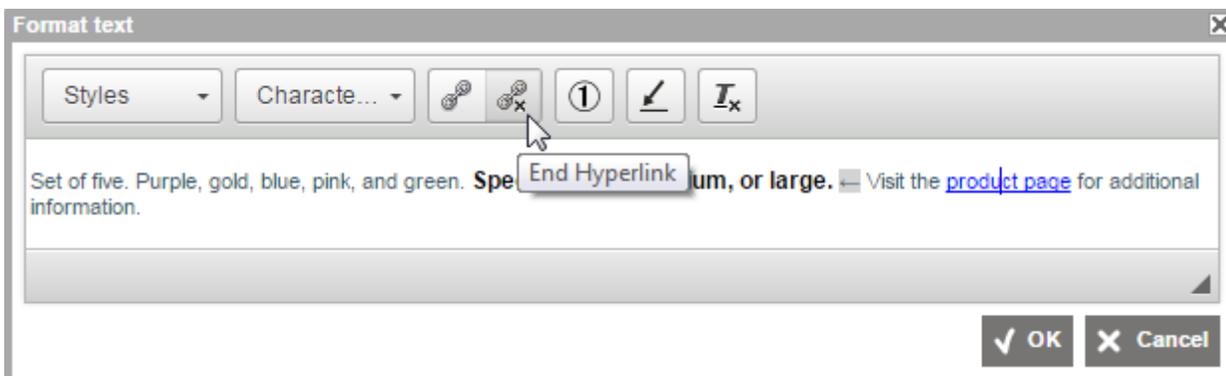
To edit the hyperlink, place your cursor anywhere within the hyperlinked text, and click the 'Add/edit' hyperlink icon. Make any changes within the URL field and click Ok.



If the hyperlink tag does not already exist, a hyperlink tag (or tags) can be created and formatting set up in the workbench and will be available in the **Insert/edit hyperlink > Style** dropdown list within Web UI. For more information on hyperlink tags, see the **Hyperlinks** section of the **System Setup / STEP Super User Guide** documentation.

## End Hyperlink

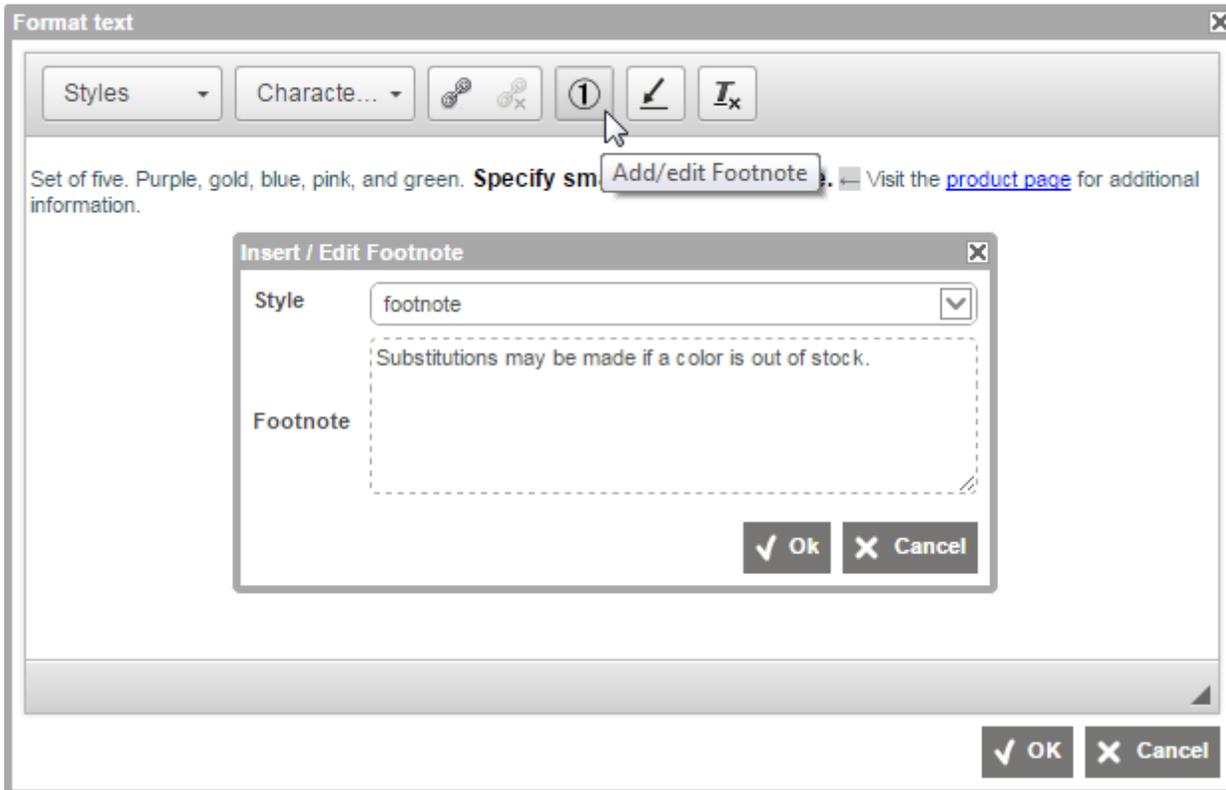
The 'End Hyperlink' icon activates when you click anywhere within hyperlinked text. Click the icon to remove the applicable hyperlink.



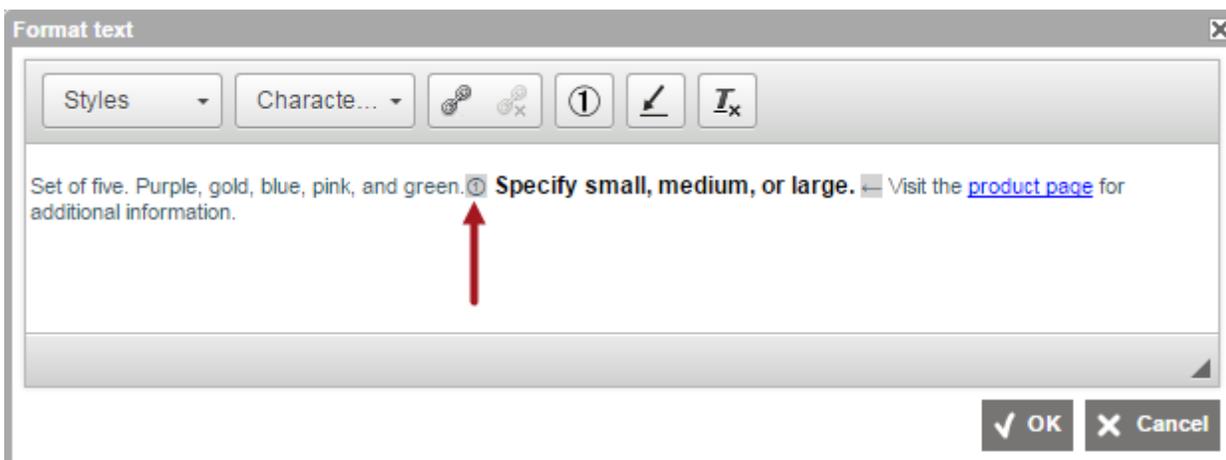
## Add/edit Footnote

To insert a footnote into the text, place your cursor where you want the footnote inserted and click the 'Add/edit Footnote' icon.

If the footnote tag does not already exist, one can be created in the workbench and will be available in the **Insert/Edit Footnote > Style** dropdown list within Web UI. For more information on how to add a footnote tag, see the **Footnotes** section of the **System Setup / STEP Super User Guide** documentation.



To edit a footnote, select the footnote icon that is within the text body, taking care to highlight only the icon. Click the 'Add/edit Footnote' icon, make any changes within the 'Insert/Edit Footnote' dialog that displays, and then click Ok.

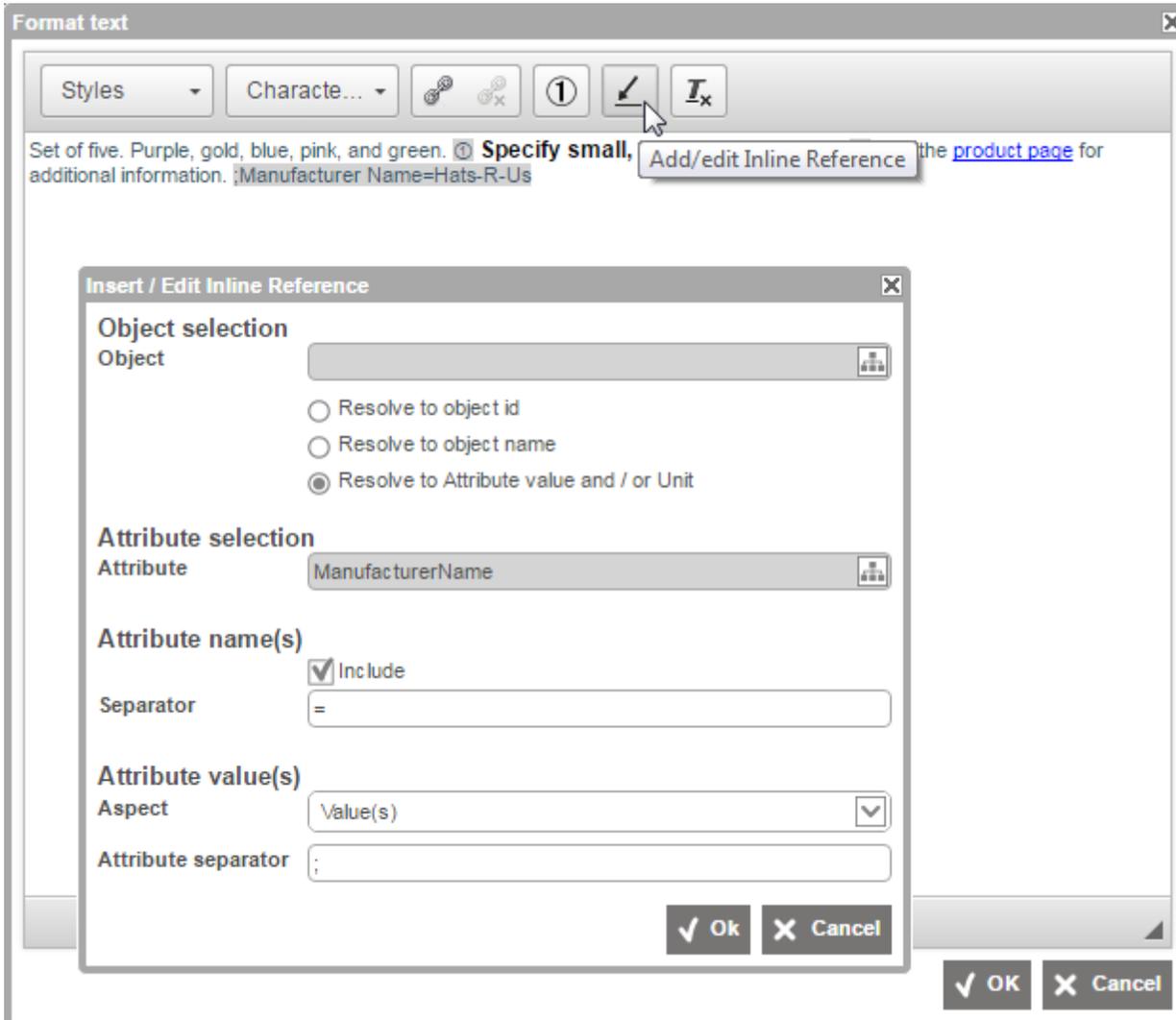


No special icon is required to delete a footnote. Just delete from the text using standard procedures (Delete or Backspace).

## Add/edit Inline Reference

Using the RTE, inline references can be embedded in attribute values using Web UI. For an introduction to inline references, see the **Adding Inline References to Attribute Values** section of the **System Setup / STEP Super User Guide** documentation.

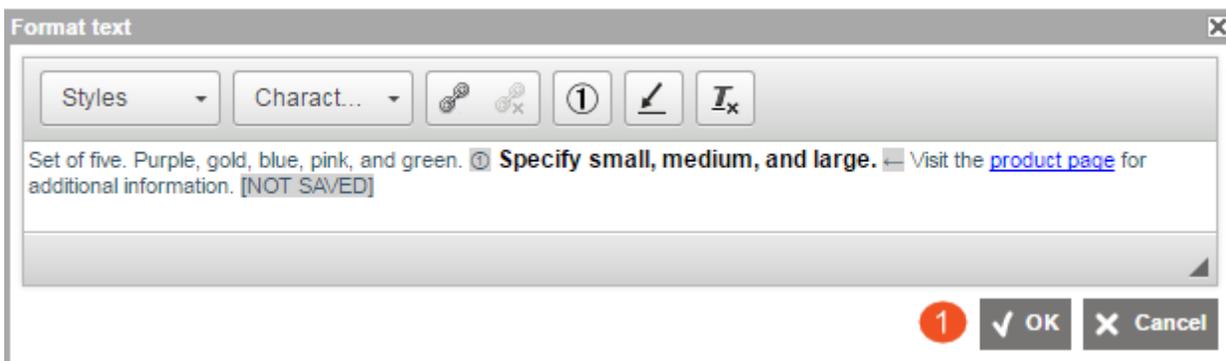
Place your cursor where you want the inline reference to go—or select the text you want to replace—and click the 'Add/edit Inline Reference' icon.



1. For the **Object** field, click the Node Picker icon (  ) to open the 'Select Node(s)' dialog. Search or browse for the relevant object that holds the attribute value to be referred to, and then click OK.
2. Choose 'Resolve to object ID,' 'Response to object name,' or 'Resolve to Attribute value and / or Unit' by clicking the corresponding radio button.

**Note:** When 'Resolve to Attribute value and / or Unit' is selected, then the other selections within the 'Insert / Edit Inline References' dialog activate and the remaining steps outlined below become valid. If selecting an alternate radio button, then click Ok and your steps are complete.

3. For the **Attribute selection > Attribute** field, click the Node Picker icon to open the 'Select Node(s)' dialog to search and browse for the relevant attribute (or attribute group) for the inline reference, and then click OK. (Only one attribute or attribute group may be selected.)
4. For **Attribute name(s)**, check the 'Include' check box if the name of the attribute(s) should be included in the inline reference. If including the name, then go on to Step 5. If not, skip to Step 6.
5. In the **Separator** field, type a Separator to be used between the name and value of the attribute. An equals sign (=) is the default.
6. Under **Attribute Value(s)**, use the **Aspect** dropdown to select the relevant value to include for the attribute. You can select between Value(s) and Unit(s), Value(s), and Unit(s).
7. The **Attribute Separator** field is only available if a multi-valued attribute has been selected. If applicable, in the **Attribute Separator** field, type a separator to specify how values should be separated. A semicolon (;) is the default separator.
8. Click **Ok**.
9. Once you click Ok, the 'Format text' editor will show the inline reference as '[NOT SAVED]'. You will need to click OK on the text editor and then save the data before it will display in the value field. The attribute must be valid for the object type, otherwise the inline reference disappears from the value field upon save.



Description, Web



Editing an inline reference works the same way as editing a footnote. Select the inline reference text within the editor, taking care to highlight only the applicable text. Click the 'Add/edit Inline Reference' icon, make any changes within the 'Insert/Edit Inline Reference' dialog, and then click Ok. Next, click OK on the text editor dialog, and then click Save (or Save & Approve) on the screen that you are one.

For more information about the attribute components in Web UI, see the **Attribute Value Components** topic and the **Attribute Value Group Components** topic.

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**Important:** After all changes have been made within the text editor, you must click **OK** to save all of the changes. Clicking 'Cancel' or navigating away from the page means that the changes made in the RTE will not be saved or displayed.

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If you experience issues while using the Rich Text Editor in Internet Explorer, use an alternate browser such as Chrome, Firefox, or Safari.

## Shared Data Handling

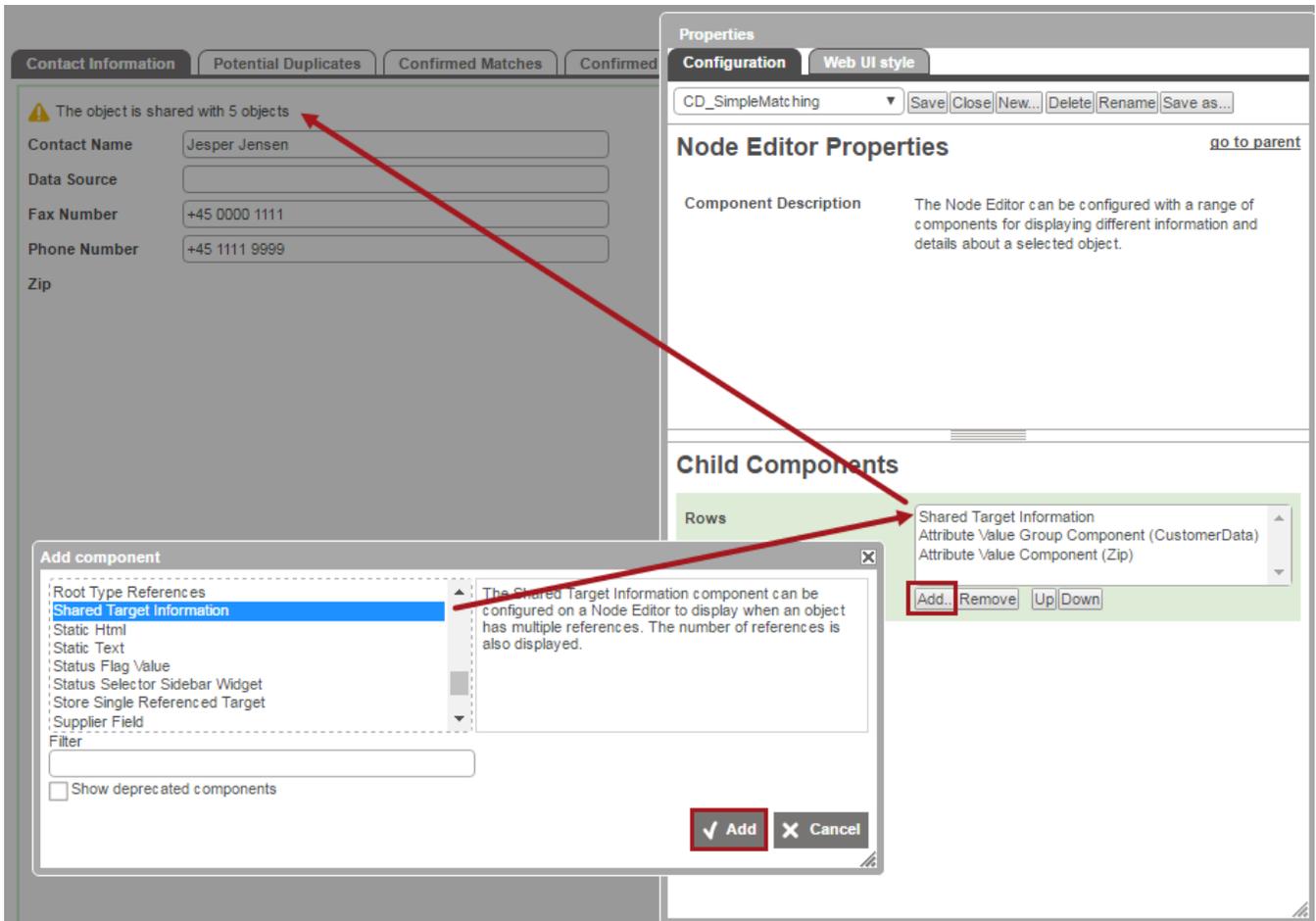
Users must be careful when working with shared data in order to maintain data integrity and safeguard data from inadvertent changes. This becomes particularly relevant when objects are referenced by more than one other object. In this case, changes to that target object have the potential to impact every source object referencing it. In order to better assist users in working with shared data, there are various Web UI features to improve the way shared data is identified and handled.

These features include, but are not limited to, a visual indicator that can be configured to display for shared objects shown on a Node Editor screen, a warning that can be presented to users when attempting to save changes to a shared object, and the ability to clone a reference target.

### Shared Target Information on Node Editor

The Shared Target Information component can be added to a Node Editor to provide a visual indicator that an object is referenced by two or more objects. The total number of those referencing (source) objects is also displayed. These all combine to serve as a notice to the user that updating data, if allowed, will impact more than the selected object.

The Shared Target Information component is available to add as a child component within Node Editors (Child Components > Rows), following the same process that is used to add other components like Name Value, ID Value, Attribute Value, and Attribute Value Group.

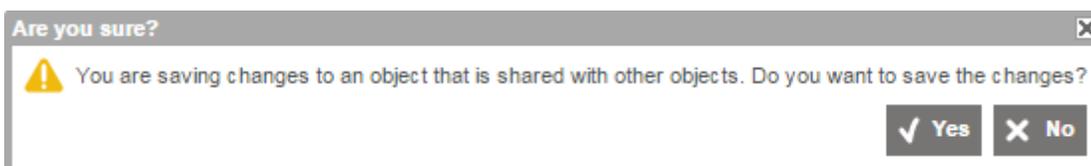


Similar visual indicators for shared objects are the ID Shared Target Header component (Multi-Reference Editor) and the Follow Single Reference component (Node Editor).

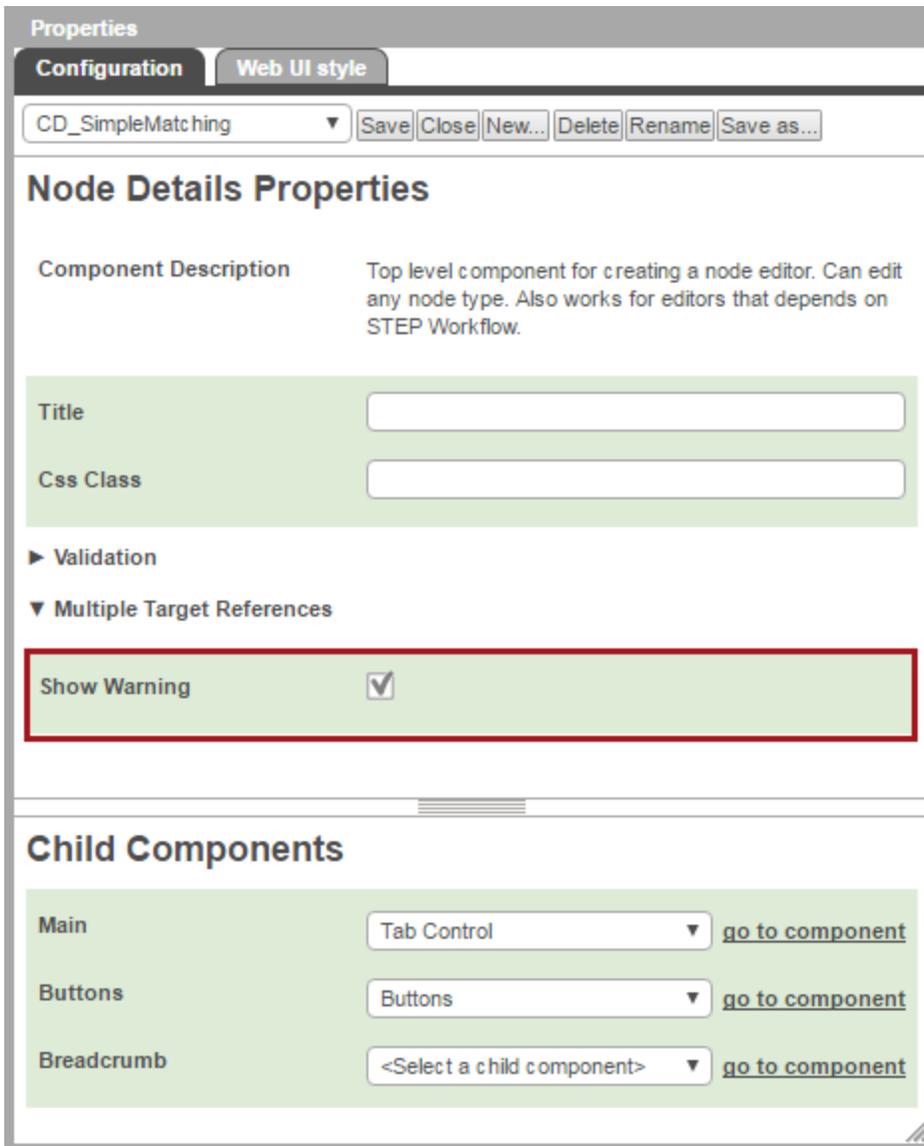
For more information on Web UI components and configurations, see the Web User Interfaces documentation.

## Shared Object Save Warning

When a shared object is edited and then saved, either through an actual Save action or implied save (e.g., Submit Action or Approve Action), an additional layer of protection (a warning message) can be added by an admin user. An end user will be presented with a 'Are you sure?' dialog letting them know that the object that they have edited and are saving is a shared object and any changes could have implications for other objects. The user must actively confirm that this is acceptable before the object can be saved successfully. The user may also choose to cancel out of the warning and decide not to save the changes.



To activate the warning, it must be enabled on the Node Details configuration. The Show Warning parameter is accessed under the Multiple Target References parameter group. When Show Warning is enabled (checked), the warning will display to end users upon save. If disabled (which is the default), no warning will be shown and changes will save as they have previously.

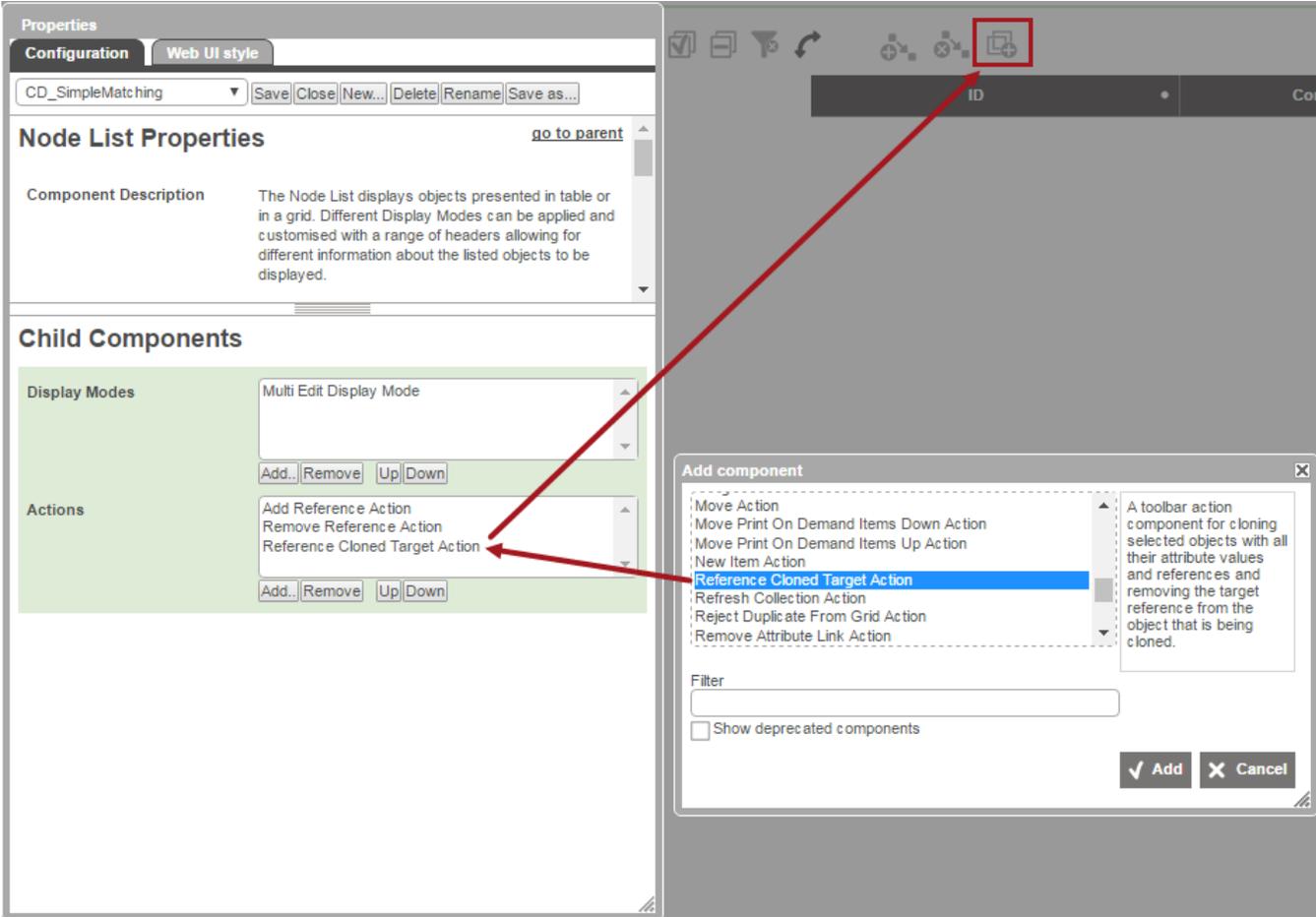


The screenshot shows the 'Node Details Properties' configuration window. At the top, there are tabs for 'Configuration' and 'Web UI style'. Below the tabs is a dropdown menu showing 'CD\_SimpleMatching' and several action buttons: 'Save', 'Close', 'New...', 'Delete', 'Rename', and 'Save as...'. The main content area is titled 'Node Details Properties' and contains a 'Component Description' section with the text: 'Top level component for creating a node editor. Can edit any node type. Also works for editors that depends on STEP Workflow.' Below this are two input fields for 'Title' and 'Css Class'. A 'Validation' section is collapsed. The 'Multiple Target References' section is expanded, and the 'Show Warning' checkbox is checked and highlighted with a red border. Below this is a 'Child Components' section with three rows: 'Main' (Tab Control), 'Buttons' (Buttons), and 'Breadcrumb' (<Select a child component>), each with a 'go to component' link.

## Reference Cloned Target Action

The Reference Cloned Target Action allows a user to select an existing reference target and duplicate / clone it, creating a new object that includes the original attribute values and references. This is particularly useful in making sure a user does not inadvertently edit shared data that could have implications to other objects with the same reference. When a user needs to make changes to data that is shared (e.g., the object is referenced by multiple objects), they can clone the existing object and freely edit the data on the clone, without fear of impacting the other objects with references to the original object.

Note that users can only clone one object at a time, and objects being cloned must use auto-generated IDs.



The Reference Cloned Target Action is exclusive to the Multi-Reference Editor. Information about how to add action buttons and an example of what it looks like to clone a reference is shown in the **Multi-Reference Editor** section of the **Web User Interfaces / Using a Web UI** documentation.

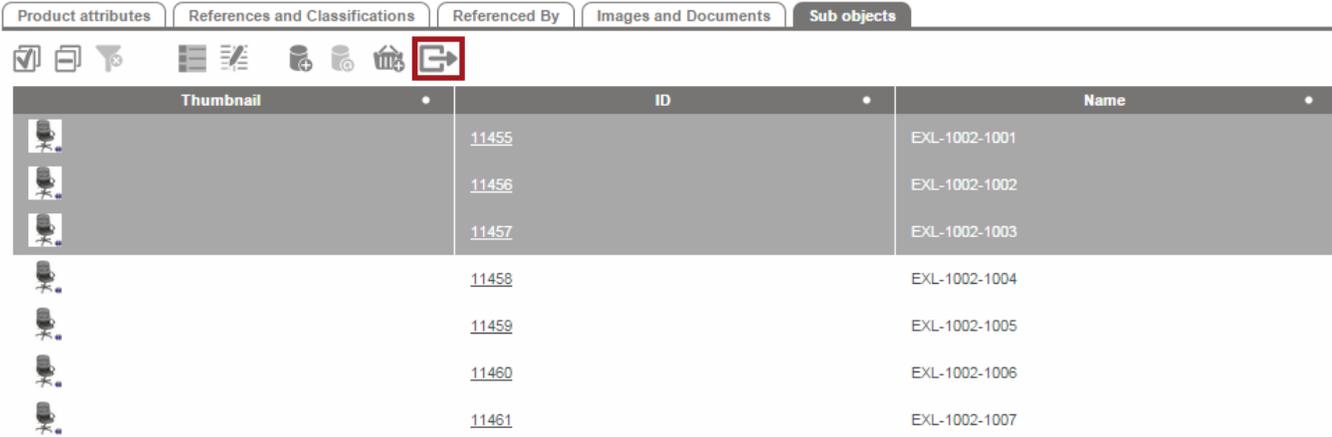
# Simple Export

With simple export, it is easy to export any selection of products, entities, and classifications. Users may export one node type at a time. And supported export formats are Excel or CSV.

To begin using the simple export functionality, the action for this has to be applied to toolbars on relevant screens.

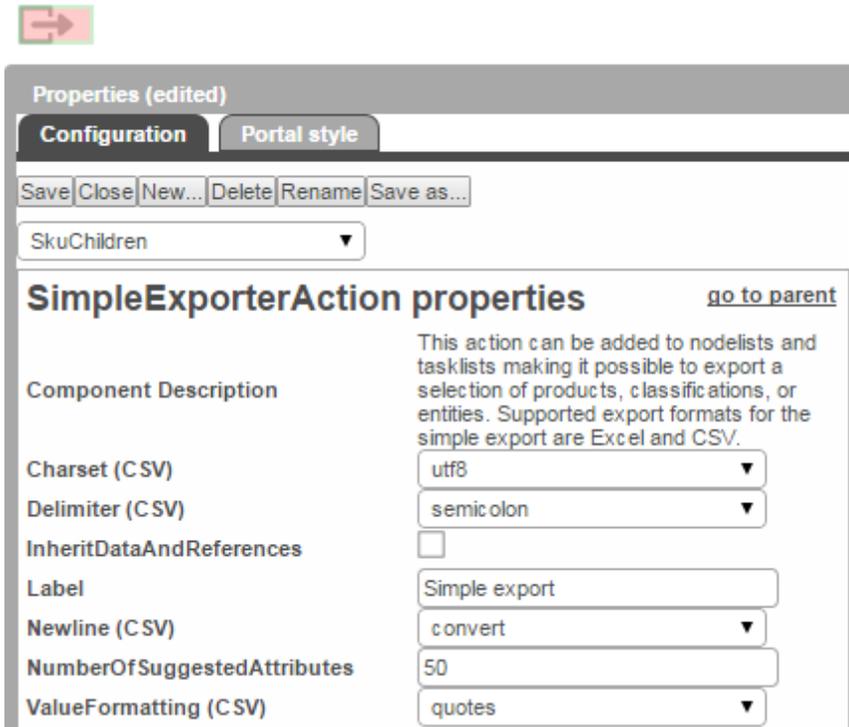
## Adding a Simple Export Action to toolbar

In the designer an action called "SimpleExporterAction" can now be added to a toolbar on a given screen of the type nodelist or tasklist:



## Configuring The Simple Exporter Action

When configuring it is possible to change the default settings shown in the screenshot below:



Properties (edited)

Configuration Portal style

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

SkuChildren ▼

### SimpleExporterAction properties [go to parent](#)

**Component Description**  
This action can be added to nodelists and tasklists making it possible to export a selection of products, classifications, or entities. Supported export formats for the simple export are Excel and CSV.

**Charset (CSV)** utf8 ▼

**Delimiter (CSV)** semicolon ▼

**InheritDataAndReferences**

**Label** Simple export

**Newline (CSV)** convert ▼

**NumberOfSuggestedAttributes** 50

**ValueFormatting (CSV)** quotes ▼

**Charset (CSV):** Can only be configured in the designer.

**Delimiter (CSV):** A default can be set here, but the end user can overwrite this setting when doing an actual export.

**InheritedDataAndReferences:** If selected, the Export Manager extracts values for products that have inherited values from products at a higher level in the hierarchy.

**Label:** The mouse over label for the simple export icon can be changed here.

**NewLine (CSV):** Select whether you want to keep carriage return (new line) or convert to a space instead. The latter is recommended. If you keep the carriage returns, you may experience issues with the data integrity.

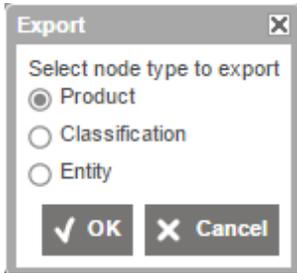
**NumberOfSuggestedAttributes:** When mapping the attributes, the number of suggestions can be changed here.

**ValueFormatting (CSV):** Select either to export all values in quotes or without quotes.

## Using the Simple Export Action

When the portal user has not picked a selection of objects to be exported, the icon will not be enabled and will be grayed out.

If the selection consists of more than one node type, the user is asked to decide which node type to export:

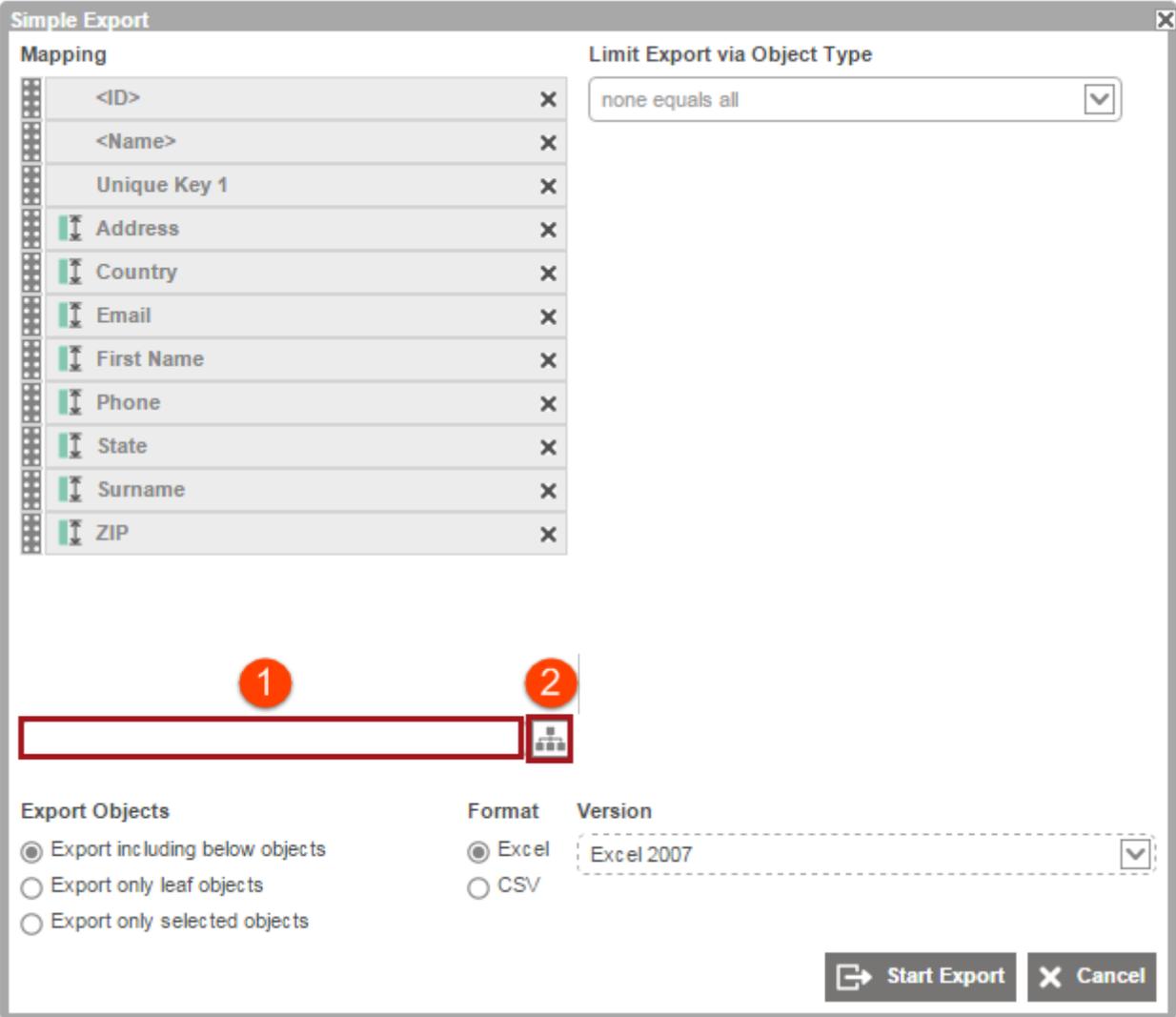


If the selection is limited to less than one hundred objects, this choice is only presented when objects of different node types are present in the selection.

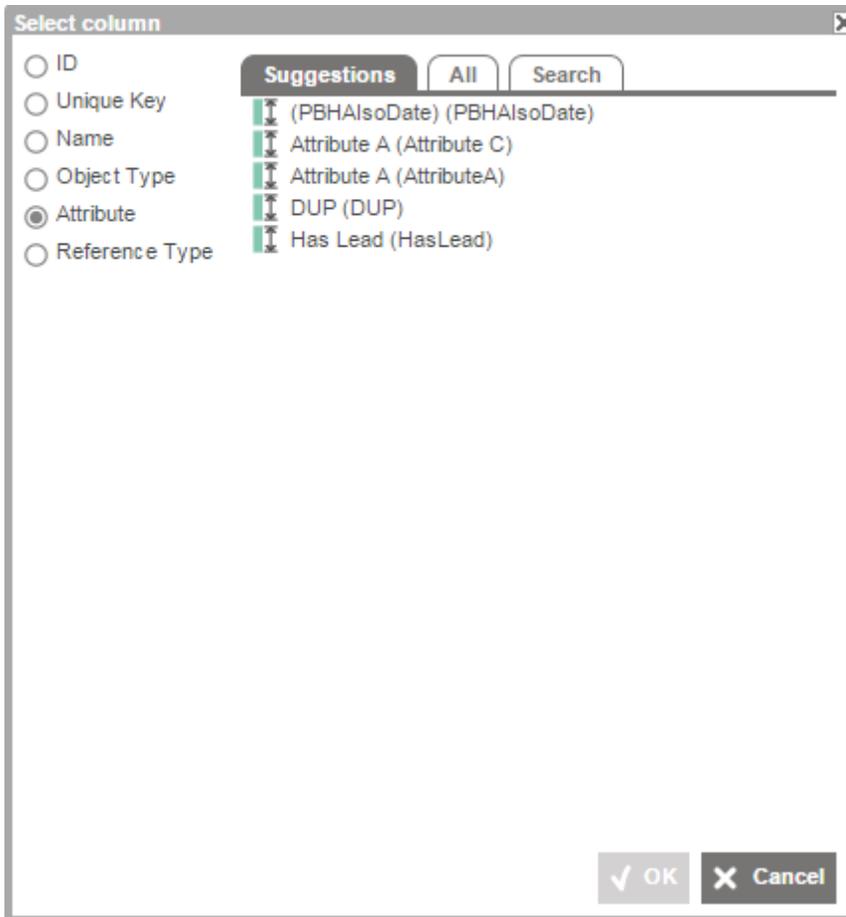
## Mapping

On the Simple Export mapping screen (shown below), the ID is pre-selected for inclusion.

1. There is a type-a-head field where the user can search for attributes, keys, references, names, and object types to map to.
2. It is also possible to browse by using the node picker icon.



Invoking the node picker gives the following:



ID, Key, Name, Object Type, Attribute, and Reference Type can be mapped from this screen.

For attributes, suggestions are given based on a sample of the objects in the beginning of the selection.

Under the 'All' tab you can browse through all the attributes in the system. Finally, you can search for a given attribute under the 'Search' tab.

## Limiting the object types to export

At the bottom of the Simple Export mapping screen, the user can choose which objects to export:

- Export including below objects
- Export only leaf objects
- Export excluding below objects

Also on this screen, the Exported Objects can be limited further by choosing specific object types to be exclusively exported.

## Format

Also, the user needs to pick an export format: Excel or CSV.

If CSV is selected, the user can choose which delimiter to use (if the default one configured in the designer is not applicable for the given job).

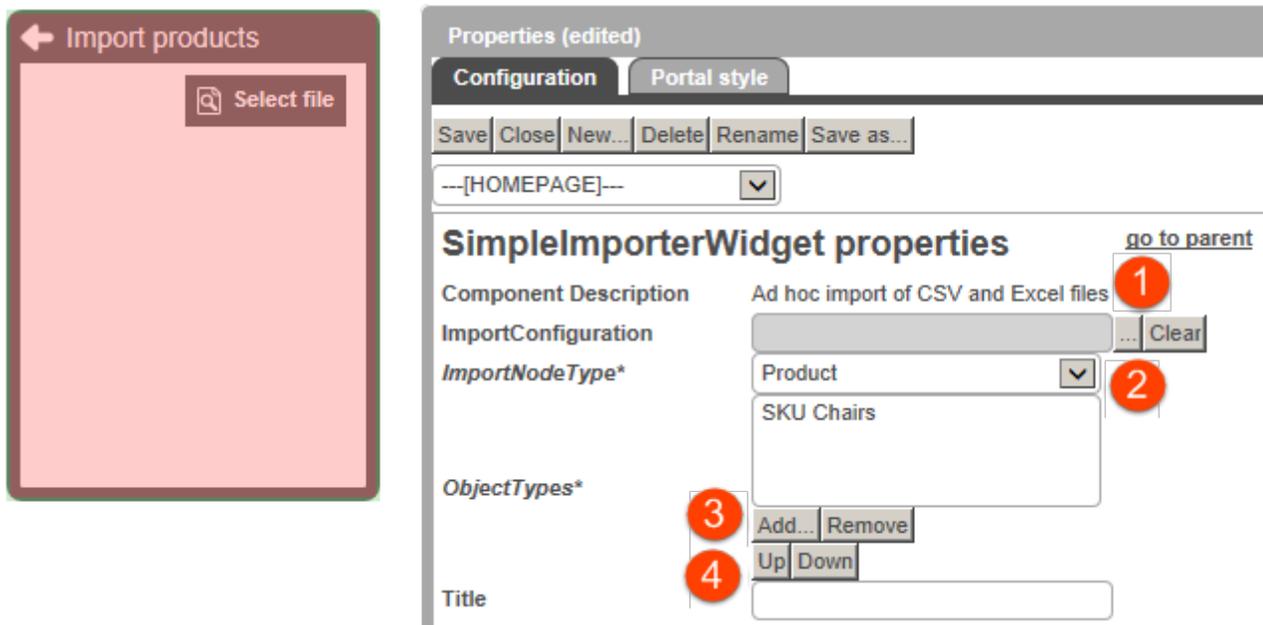
## Simple Import

With simple import, it is easy to import products, entities, and classifications.

It is possible to both update existing objects and to create new objects. The import formats are Excel 2003/7 or CSV.

### Adding an import widget to homepage

On the homescreen a widget called "SimpleImporterWidget" can be added in the designer.



1. An existing import configuration made in workbench can be applied. This opens up importing using more advanced features. For more information please see the **Importing Data** section of the **Import Manager** documentation.

2. An Import Node Type should be selected: product, entity, or classification. Widgets can be made for each node type, if wanted.

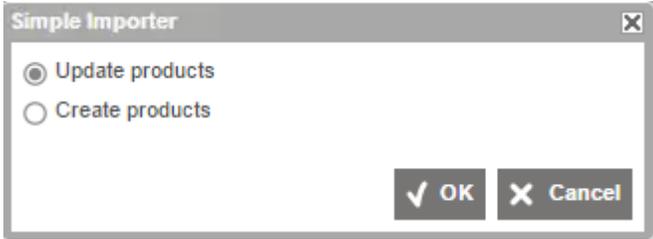
3. One or more object types can be added. This means that only the defined object types can be imported with the widget. It is required to choose at least one object type to import with the widget.

4. The user may input a title. The default title given is 'Import <nodetype>'.

### Using the Simple Import Widget

An import file format is selected (either an Excel 2003/7 or a CSV file). If using the Chrome browser, the user may drag and drop the file to the widget. Otherwise, the 'Select file' button is used for picking an import file.

Next, the user determines if they are updating existing objects or creating new ones:



**Note:** If the imported file holds a mix of existing products and products to be created, the 'Import products' choice determines what will be successfully imported. If "Create products" is selected, then new products will be created. And if "Update products" is the picked, only the existing products will be updated.

If picking a 'create' task, the user will have to choose where in the hierarchy the objects should be created.

If more than one object type is chosen when configuring the widget, a dropdown is automatically added to the widget for the user to choose which type to create when importing new products.

A form titled "Create Product" with several input fields: "ID\*", "Name\*", "Description", "Manufacturer Part Number", "Brand Name", "Country of Origin", and "Parent Node\*" (with a tree icon). Below these is a "Supplier Assets" section with a green plus icon. A dropdown menu is open for "Supplier Assets", showing a list with "GLN1" selected (highlighted in blue), "GLN2", and "GLN3". The dropdown is enclosed in a red border.

## Mapping

After pressing 'OK' the file is imported and columns are automatically mapped where column headers match an attribute name in STEP. If successfully mapped, the background color changes to green. If not mapped, the user can manually map the column by starting to type the STEP attribute name and choosing from the suggested attributes shown.

Import products

Unique key: Testkey

Mapped columns: 6 of 48  
 Hide mapped columns

<ID>	<Name>	Aspect Ratio	Attribute Description	Attribute Description (2)	CA-CONDITION	Clothing Type
ID	<Unmapped>	<Unmapped>	Attribute Description (Armrests)	<Unmapped>	<Unmapped>	<Unmapped>
L6576	Panasonic Viera TC-P65VT50	16.9				
L6577	Samsung UN55E8000F	16.9				
L6578	Panasonic Viera TC-P50UT50	16.9				
L6579	LG 50PN6700	16.9				
L6580	Sony KDL-55W900A	16.9				
L6581	Vizio E471VLE					
L6582	Sony Bravia KDL-46BX450	16.9				
L6940	Samsung UN70ES800	16.9				
L7123	Panasonic TC-P60ZT60	16.9				
L7130	Samsung PNF8500	16.9				
L7133	Toshiba L2300U	16.9				
L7143	Toshiba L2300U					
L7144	LG 42GA6400	16.9				
UNSPSC000.52161600	Audio visual equipment accessories					
L6587	MELICONI STILE S800					
L6588	Digicom Super Flat Tilttable LED Wall Mount					
L7219	Flex Mount					
L7225	Multibrackets M Universal Tilt Wallmount					
L10336	MultMount Wall Mount					
L7346	Milano Cotton Chino Trousers (male)					Chinos
L7352	Chile Cargo Cotton Shorts (male)					Shorts
L8304	Oslo Jeans (male)					Jeans
L18907	Jeans 1a					Bermuda Shorts
L19250	Shorts					Shorts
L59250	Shorts					Shorts
L19252	Shorts2					Shorts
L19254	Shorts2					Shorts
L19277	Shorts3					Shorts
L19294	Shorts4					Shorts
L7354	Skimnyfive Cotton Trousers					Trousers
L10092	Vienna Bermuda Shorts					Bermuda Shorts
L7351	Milano Cotton Chino Trousers (female)					Chinos
L7357	Chile Cargo Cotton Shorts (female)					Shorts

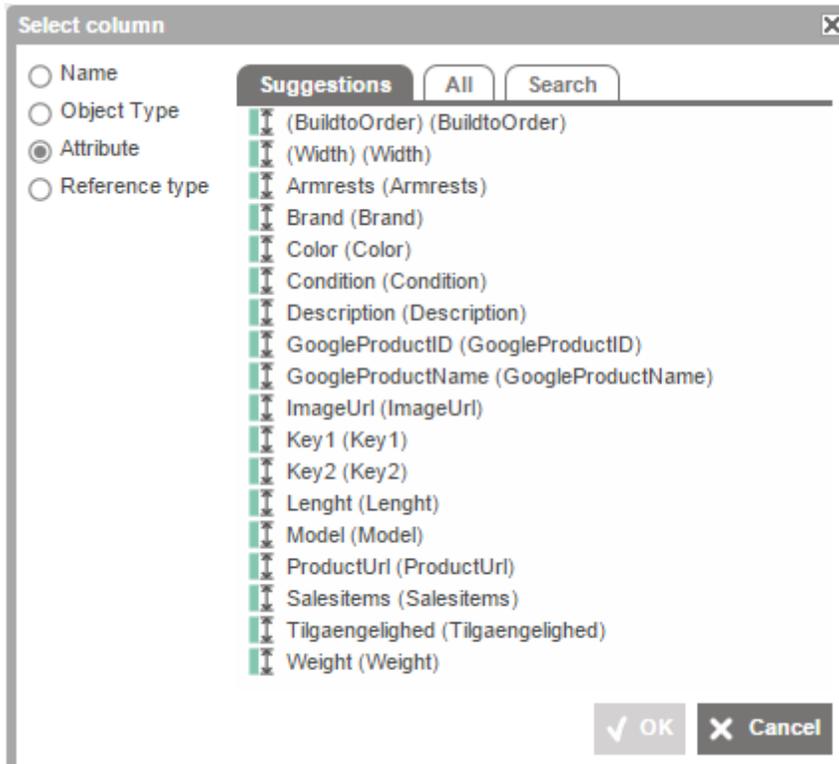
OK Cancel

In the top right corner, it is possible to hide all mapped attributes. This makes it easy to find the attributes which need to mapped manually. When at least 'ID' or another key has been mapped, then the 'OK' button is enabled.

If the naming of the attribute is uncertain the edit icon can be invoked:



and the following shows up:



In the 'Suggestions' tab, suggestions are made for mapping to an attribute based on a set of the imported objects. In the second tab, 'All' attribute groups and attributes are made available. You can search for a given attribute using the 'Search' tab.

---

**Note:** It is important to note that all reference types will have to be mapped manually. Automatic mapping of references is not supported.

---

If values from an attribute do not validate, they are shown with a red background in the preview window. When importing, those values will be skipped.

---

**Note:** Derived attributes cannot be mapped for import.

---

## Map Keys on Import

If STEP ID is omitted from the input file, it is possible to match an existing product via its key instead. To accomplish this, the user must map a key in place of STEP ID during the import, using the **Unique key** radio button.

New products cannot be created in this way as a key cannot exist until its underlying attributes have been defined. Click the **Unique key - mapped by Attribute** radio button to create a new product using the underlying attributes of a key. This method can also be used to update existing products.

1. In the Import Products window, click the **Unique key** radio button.

Simple Import

ID Mapped columns: 3 of 3  
 Unique key  Hide mapped columns  
 Unique key - mapped by Attribute Key 2

<ID KeyID=Key 2>	<Name>	<Object Type Name>
<ID KeyID=Key 2> (Key 2)	Name	Object Type
3457-7962	Product A	SalesItem
5198-4432	Product B	SalesItem
8666-9064	Product C	SalesItem
7622-9810	Product D	SalesItem

- 2. Click the edit icon  in the desired field and the Mapping window will appear.
- 3. Click the **Unique key** radio button and select a key from the drop down menu. Click **OK**.

Mapping

ID  
 Unique key Unique Key 2a  
 Name Unique Key 2a  
 Object Type Unique Key 1  
 Attribute  
 Reference type

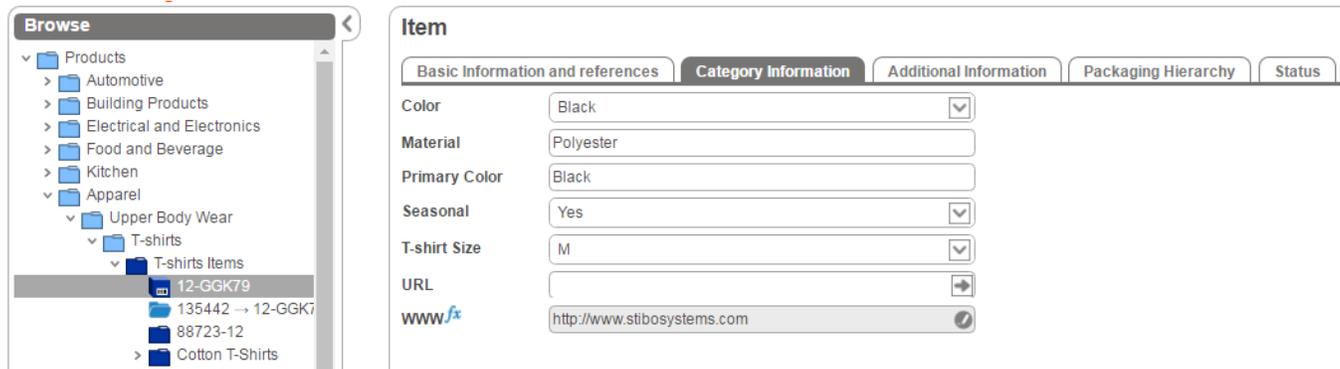
OK  Cancel

- 4. Map the remaining fields and then click **OK** to start the import.

**Note:** The option to map keys will only be available when applicable to the imported object type and when there is a valid key active in the system.

## Tab Pages

When viewing objects in Web UI, it is often helpful to have tab pages configured so that users can access all relevant information in a single screen, while also sectioning it into meaningful groupings that provide a user-friendly and more efficient work stream.



## Adding Tab Pages

To add tab pages, a **Node Details** screen must be configured.

1. Open an existing **Node Details** screen type, or create a new one. Select **Tab Control** for the **Main** parameter under Child Components. Click the **go to component** link.

Properties

Configuration Web UI style

Item detail Save Close New... Delete Rename Save as...

### Node Details Properties

Title

Css Class

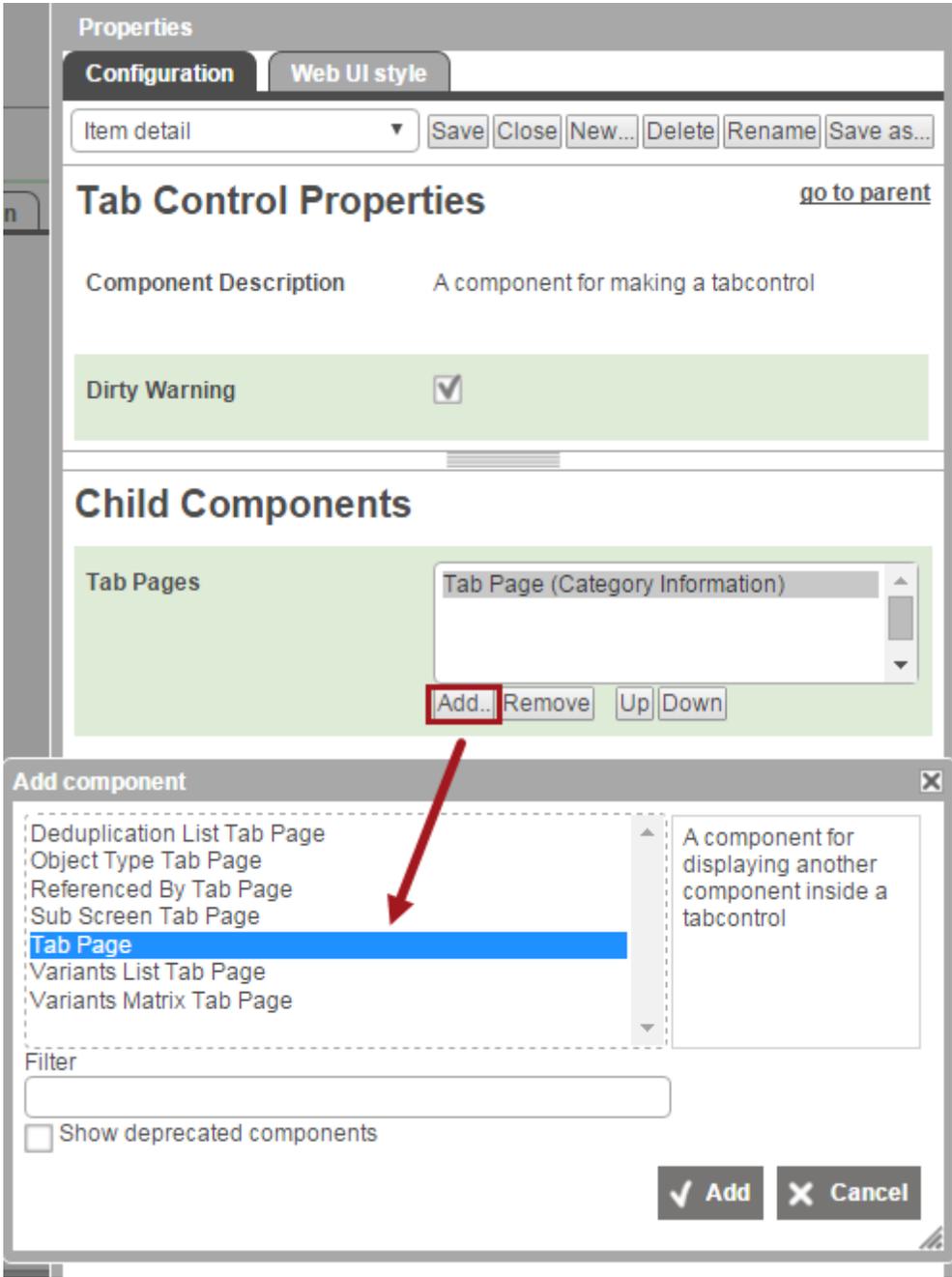
► Validation

► Multiple Target References

### Child Components

Main	<input type="text" value="Tab Control"/>	<a href="#">go to component</a>
Buttons	<input type="text" value="Buttons"/>	<a href="#">go to component</a>
Breadcrumb	<input type="text" value="&lt;Select a child compo"/>	<a href="#">go to component</a>

2. On **Tab Control Properties**, add a **Tab Page** to the **Tab Pages** parameter in Child Components. Double click on **Tab Page** once it is added.



3. On the **Tab Page Properties**, type in a name for the tab page under **Title**.

Properties (edited)

Configuration Web UI style

Item detail Save Close New... Delete Rename Save as...

### TabPage Properties [go to parent](#)

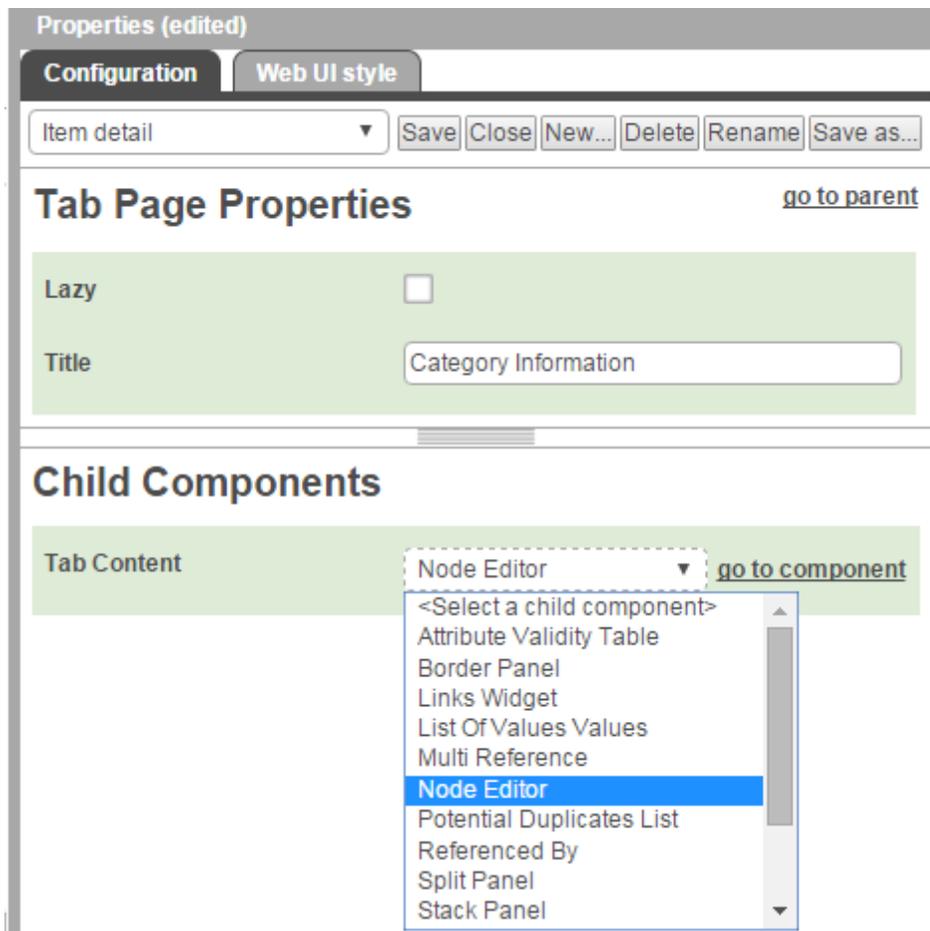
Lazy

Title Category Information

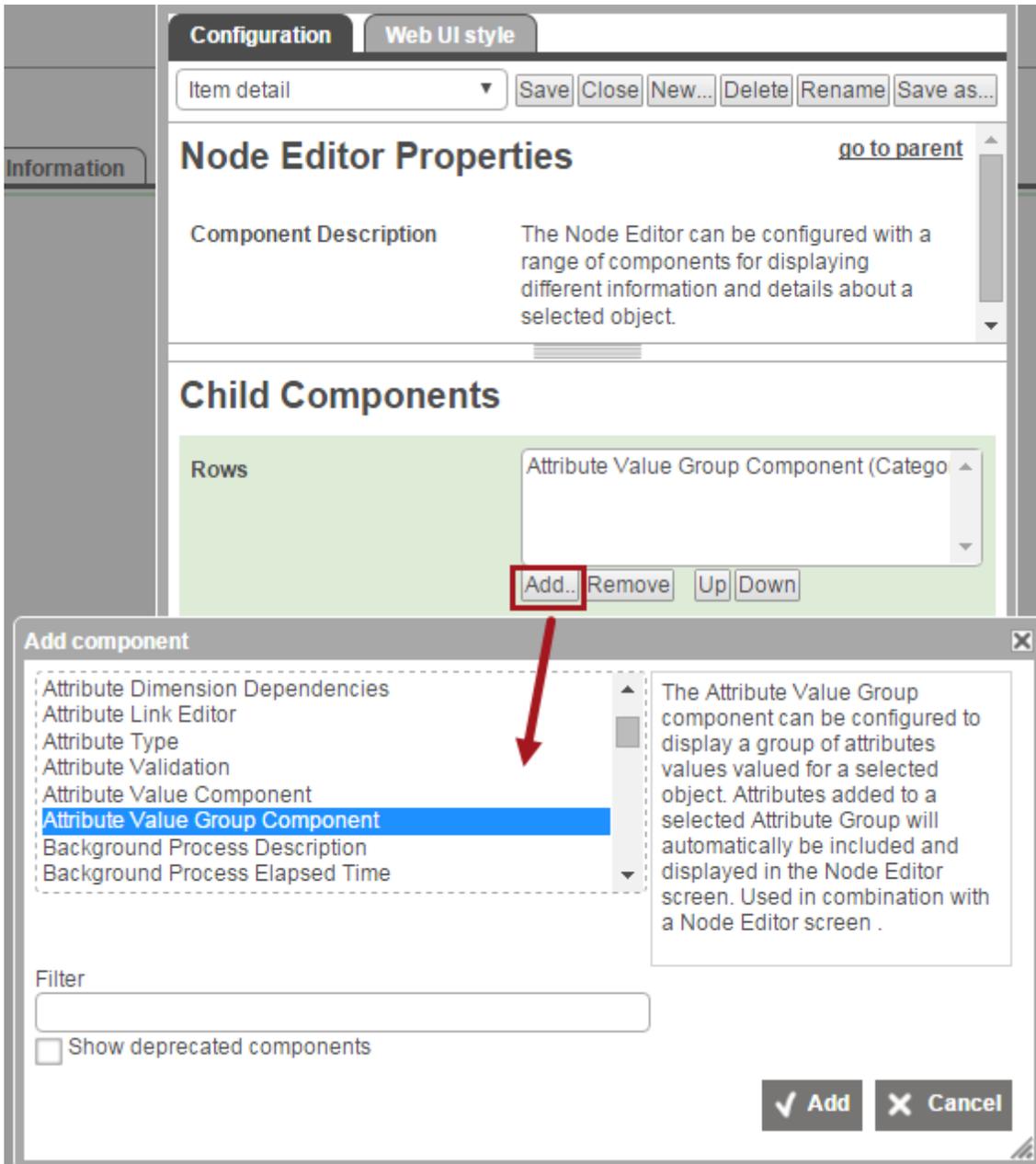
### Child Components

Tab Content  [go to component](#)

4. Under Child Components, add the desired component(s) to the **Tab Content** parameter. In many cases, this will be a Node Editor, and that example will be followed in the next steps. However, any component can be used and the proper selection is determined only by the layout the designer wishes to provide for the end user. If more than one component should be accessible on a single tab, oftentimes a Draggable Split Panel component will be added in this step, with individual components subsequently being added as children to the Split Panel. Regardless of the component selected, click the **go to component** link after it has been added to configure the child component.



- As mentioned above, any component could have been selected in the previous step, but this example will continue using a Node Editor. On the **Node Editor**, add the desired child components to the **Rows** parameter. Depending on the component selected in the previous step, differing child components may be available, and any number of them can be selected to build the appropriate interface for the end user. It is likely that each selected child component will require additional configuration, which users are prompted to complete as the components are added.



- The above steps can be repeated as needed to add additional tabs. To do this, click on the **go to parent** link in each properties window until the **Tab Control Properties** are shown again. From there, steps 2-5 can be repeated as many times as needed to complete the configuration.

### Tab Page Data Error Indicator

When using tab pages, if there is any type of error that impacts the data displayed on a tab (a validation error or missing mandatory value), then a yellow line is displayed directly under the tab name. The underline serves as an easy notification to users that attention is required on a particular tab page or on multiple tab pages. No configuration is needed to turn on this feature.

In the screenshot below, the first tab shows the Basic Information and References title with a yellow underline because Feature Bullet 1 is mandatory. Additionally, there is a missing mandatory attribute value on the Cost and Prices tab also.

**Sales Item**

Basic Information and References | Cost and Prices | Status | Translation | Data Visualization

Product Category *fx* | Products | Apparel | Head Wear | Hats and Caps | Hats and Caps

Name | 20808-013

Description, Web | 100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric Underliner, Matching

Feature Bullet 1\* |

### Adding Sub Screen Tab Pages

Sub Screen Tab Pages can also be added as child components under Tab Control Properties. Instead of configuring components to display on tab, you select a screen to display. No additional mapping is required since the end user will see the screen as a tab option when clicking on the Node Details screen.

Properties | Configuration | Web UI style

Item detail | Save | Close | New... | Delete | Rename | Save as...

**Sub Screen Tab Page Properties** | go to parent

Component Description | A component for displaying a tab which shows another screen

Details Screen\* | Multi Revision Screen | Add

Title | Revisions

Properties | Configuration | Web UI style

Item detail | Save | Close | New... | Delete | Rename | Save as...

**Sub Screen Tab Page Properties** | go to parent

Component Description | A component for displaying a tab which shows another screen

Details Screen\* | Packaging Hierarchy - New | Add

Title | Packaging Hierarchy

Properties | Configuration | Web UI style

Item detail | Save | Close | New... | Delete | Rename | Save as...

**Sub Screen Tab Page Properties** | go to parent

Component Description | A component for displaying a tab which shows another screen

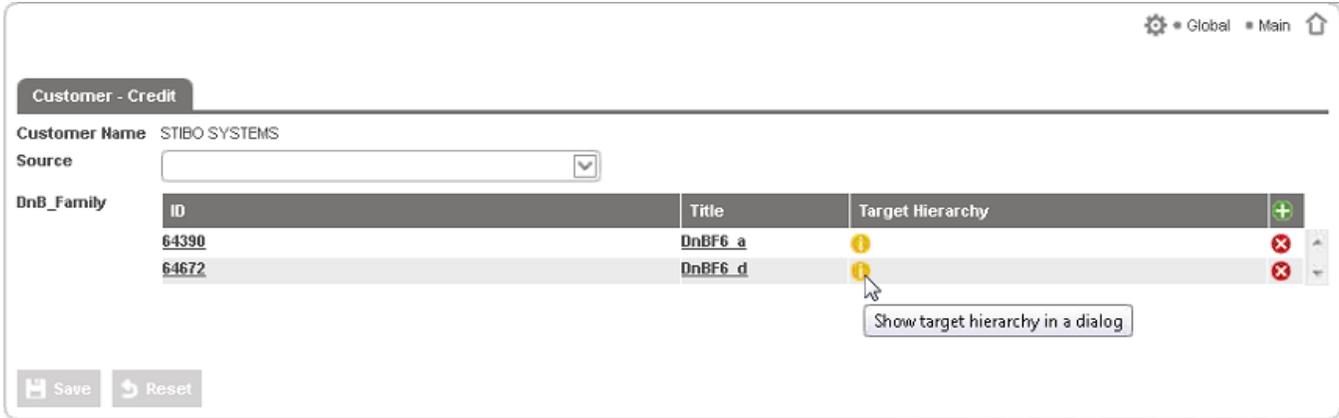
Details Screen\* | Display Relations Screen | Add

Title | Data Visualization

# Target Hierarchy Column

Objects' references to hierarchies can be shown in tree views in the STEP Portal, thereby allowing users to view the position in the hierarchy and expand their view upwards and downwards to get an overview of alternative relationships of the objects in question.

This functionality is especially usable when wanting to, for example, model and view customer data where an organization can be related to multiple other organizational hierarchies. It is also relevant in order to display the position of a product in various web hierarchies.



The above shows an example where the TargetHierarchColumn component is in use to show references in a dialog (see below) to a hierarchy:

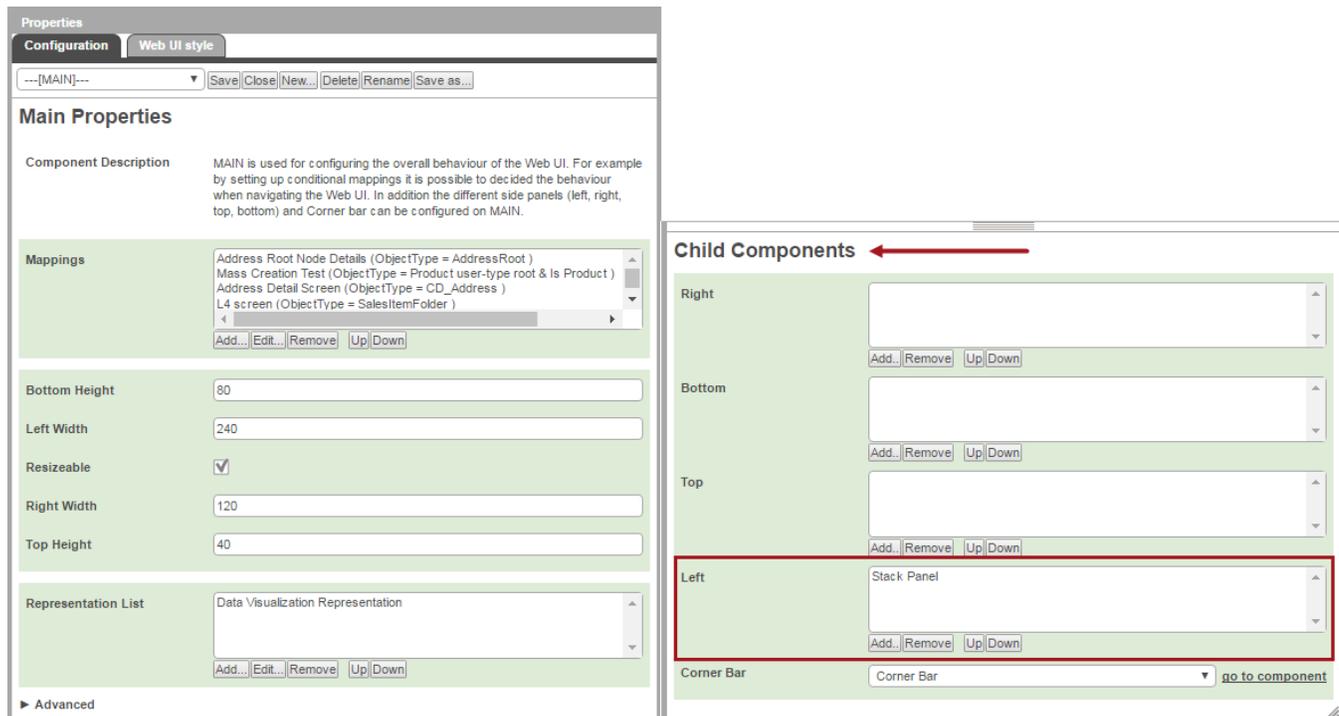


It is also possible to go to the object selected in the dialog.

# Tree Navigator Component

A **Tree Navigator Component** is a customizable component that provides a navigable hierarchical display of the objects in STEP and is similar to the Tree tab within the workbench. It can also be configured to display attribute groups, attributes, List of Values (LOV) groups, and LOVs—similar to the System Setup tab within workbench. A Tree Navigator Component is ultimately configured through the **Main Properties > Child Components**.

Note that all steps provided in this topic assume the Web UI designer is in design mode and on the **---[MAIN]---** screen prior to starting the configuration process. A full description of how to configure and access the Main Properties screen can be found in the **Main Properties** section of the **Web User Interfaces / Using a Web UI** documentation.

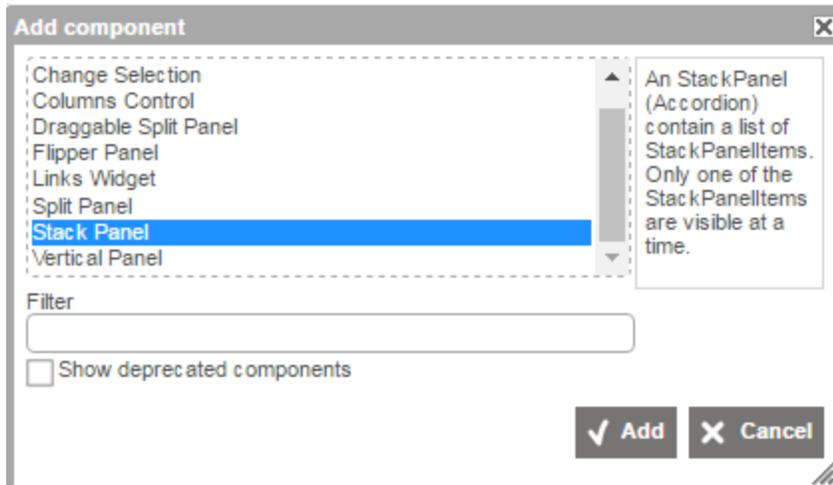


## Configuring the Child Components

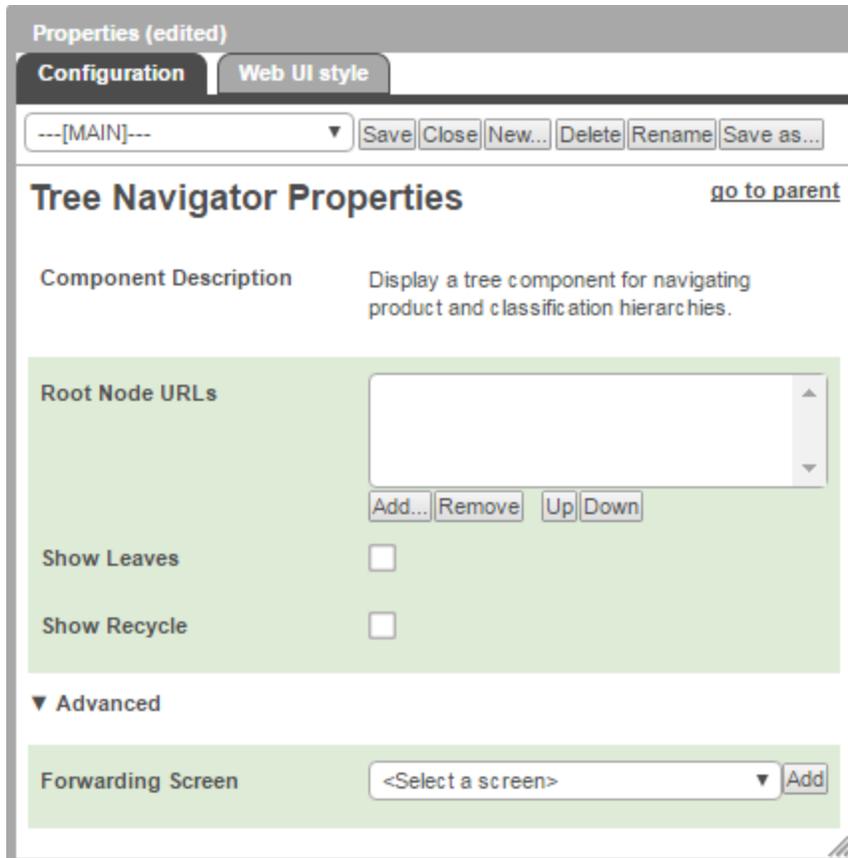
When using a Web UI created from one of the standard templates, by default, the Left component is already configured with a Stack Panel. This component can be removed or additional configuration of an existing component can be performed.

To add / configure a component to the Left, Right, or Bottom options, follow these steps:

1. Click **Add** under the applicable component value field in Main Properties.
2. Make a selection in the 'Add component' dialog. For example, a Vertical Panel arranges components vertically on the screen, and a Stack Panel also arranges components vertically on the screen but only one component is fully displayed at a time. (How to configure a Stack Panel will be described in the remaining steps.)



3. Select Stack Panel and click **Add**.
4. Double click the Stack Panel that was added to the value list.
5. In Stack Panel Properties > Child Components > Items, click **Add**.
6. Select Stack Panel Item and click **Add**.
7. Now, double click the Stack Panel Item that was just added to the value field. (If there are multiple Stack Panel Items, new ones will be listed at the bottom and can be re-ordered using the Up and Down buttons.)
8. In Stack Panel Item Properties > Child Components > Content, select **Tree Navigator** from the dropdown.
9. Click **go to component** to the right of Tree Navigator.



10. In Tree Navigator Properties:

- **Root Node URLs:** Click **Add...** to select specific nodes to display. If no selection is made, all nodes will be available.
- **Show Leaves:** Disabled by default; enable to display leaf nodes, if applicable.

---

**Note:** If displaying attribute group nodes and LOV group nodes, the Show Leaves parameter must be checked to enable the display of individual attributes and LOVs that fall under those groups.

---

- **Show Recycle:** Disabled by default; enable to display the Recycle Bin along with the root nodes.
- **Advanced > Forwarding Screen:** Forwards users to a specific screen when they click on anything that falls under the root nodes designated for the Root Node URLs parameter. If no screen ID selection is made, the screen selection will be handled by the conditions set up in the Main Properties > Mappings parameter.

11. Click **Save** to save the settings and **Close** to exit design mode. If preferred, you can return to Main Properties to evaluate other parameters (described below).

These steps are specific to the Tree Navigator component. To configure a different child component, follow Steps 1 through 7 and make a different selection in Step 8.

## Configuring the Main Properties

The information that follows is applicable to the components set up to display as Child Components in Main Properties.

### Height / Width Settings

The default pixel value for height and width settings varies depending on the template used when originally creating your Web UI.

The screenshot below shows the default pixel settings shared by the Web UI templates. The Left Width default may vary slightly (240, 280, 300) depending on the template used. All can be adjusted as needed.

Bottom Height	<input type="text" value="80"/>
Left Width	<input type="text" value="300"/>
Resizable	<input checked="" type="checkbox"/>
Right Width	<input type="text" value="120"/>
Top Height	<input type="text" value="40"/>

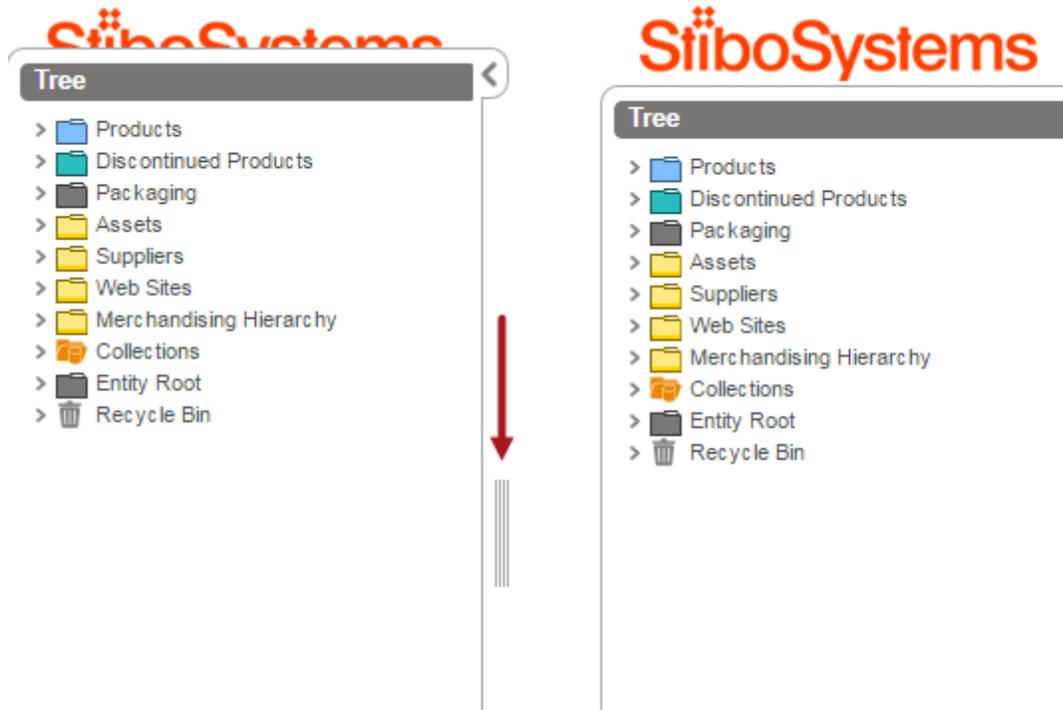
- Bottom Height:** Determines the height of a component added to the Child Component > Bottom parameter. The parameter is placed on the bottom of the screen and expands up. The greater the number of pixels, the taller the component.
- Left Width:** Determines the width of the component added to the Child Component > Left parameter. The parameter is placed on the left side of the screen and expands out to the right.



- Resizable:** Determines if a drag handle (shown in the next screenshot) will appear so that the child component can be resized manually (applies to all child components set up in Main Properties). The resizing takes effect for a single screen session and the height / width parameter settings apply again automatically upon the next log in. If disabled, the drag handle does not display on the screen nor does the tab used to expand / collapse the component.

**Note:** If the Advanced > Default Side Panel parameter is set to COLLAPSED, disabling this setting will create an error when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

- **Right Width:** Determines the width of the component added to the Child Component > Right parameter. The parameter is placed on the right side of the screen and expands out to the left.
- **Top Height:** Determines how far down from the top of the screen the left and right child components are placed; the higher the number, the more space there is from the top of the screen to the top of the components. An example follows.



In the screenshot above, the stack panel on the left is shown with a Top Height setting of 20 and Resizable is enabled. The stack panel shown on the right side of the screenshot has a Top Height of 40 and Resizable is disabled, so there is not a drag handle nor a tab visible to the right of the stack panel.

## Advanced

Click on **Advanced** to display additional parameters. A description of each parameter follows. Configure each to fit your business needs.

▼ Advanced

The screenshot displays the 'Advanced' configuration interface. It contains four main sections:

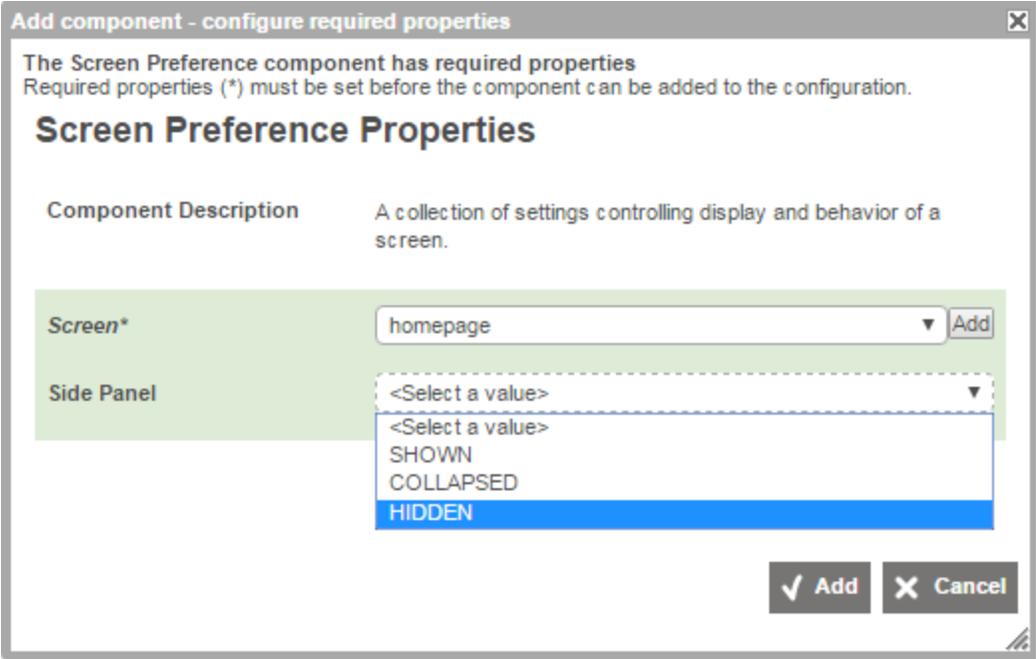
- Business Conditions:** A list box that is currently empty, with buttons for 'Add...', 'Edit...', 'Remove', 'Up', and 'Down' below it.
- Default Side Panel:** A dropdown menu currently showing 'SHOWN'. This section is highlighted with a red border.
- Info Alert Close Delay:** A text input field that is currently empty.
- Preferences:** A list box containing three entries: 'Screen Preference (SHOWN / productfolderdetails)', 'Screen Preference (SHOWN / Blank)', and 'Screen Preference (SHOWN / productdetails)'. Below the list are buttons for 'Add...', 'Edit...', 'Remove', 'Up', and 'Down'. This section is also highlighted with a red border.

- Default Side Panel** - This setting determines the behavior of the Left child component on all the pages within Web UI. Make a selection using the dropdown. An explanation of each option follows. *This is an all or nothing setting but may be overwritten for certain screens based on the Advanced > Preferences configuration.*
  - HIDDEN:** Default setting; the component will not automatically display on the screen.
  - SHOWN:** The component remains static on the left side of the screen as you navigate through Web UI.
  - COLLAPSED:** The component does not automatically display on the screen but is accessible by clicking on a tab (  ) shown on the left side of the screen.

---

**Note:** If the Resizable parameter is disabled, choosing COLLAPSED will cause an error message to display when clicking Save in the designer window. This is intentional to make the user reevaluate the settings selections, since these two settings should not be used together.

---
- Preferences:** Use the Preferences parameter to overwrite the Default Side Panel settings for specific screens. As an example, you may decide that it is best to display the Left child component on some screens (e.g., Homepage) although the Default Side Panel parameter is set to HIDDEN.
  - Click **Add...** and make Screen and Side Panel selections on Screen Preference Properties.
  - Repeat to add additional screen preferences.



### Stack Panel Example: Displaying a Tree Navigator Component

Here is an example of a configured Main Properties > Child Components > Left configuration. A Stack Panel configured to display three Stack Panel Items: a Tree Navigator (user-titled as Tree), a Tree Navigator (user-titled as System Setup), and a Status Selector Sidebar Widget (user-titled as Status Selector).

Properties

Configuration Web UI style

---[MAIN]---

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

### Stack Panel Properties [go to parent](#)

**Component Description** An StackPanel (Accordion) contain a list of StackPanelltems. Only one of the StackPanelltems are visible at a time.

**Stack Header Height**

---

### Child Components

**Items**

- Stack Panel Item (Tree)
- Stack Panel Item (System Setup)
- Stack Panel Item (Status Selector)

Add.. Remove Up Down

**Tree**

- > Products
- > Discontinued Products
- > Packaging
- > Assets
- > Suppliers
- > Web Sites
- > Merchandising Hierarchy
- > Collections
- > Entity Root

System Setup

Status Selector

**Tree**

**System Setup**

- > Attribute Groups
- > Lists of Values / LOVs
- > Recycle Bin

Status Selector

**Tree**

**System Setup**

**Status Selector**



<u>Enrich</u>	0
<u>Marketing</u>	0
<u>Remove Object From Workflow</u>	0
<u>Verify</u>	0

# User Configurable Views

## Introduction to User Configurable Views

Providing the possibility to focus on a defined subset of data is a useful tool when working with large numbers of objects. User configurable views allow the users to tailor their view to the task at hand by letting them configure which columns of attributes to include in the multi-editor and the sequence of which these columns are displayed. This enables users to work more efficiently and faster with less on-page navigation to find relevant data.

---

**Important:** User Configurable Views must be enabled in the Web UI Designer on the multi-editor where the feature is going to be used.

---

## Configuring a View

Any configuration of a view is done in a newly designed pop-up interface readily accessible to support both prompt changes to the applied view and more in-depth modifications. Configuring a view is easy, quick, and suitable for ad-hoc modification, and can be done without the Web UI Designer. Views can be named according to their intended purpose and saved for reuse across the Web UI where a multi-editor is used. Configuring a view consists of adding / removing Value and Value Group headers and changing the sequence of displayed columns.

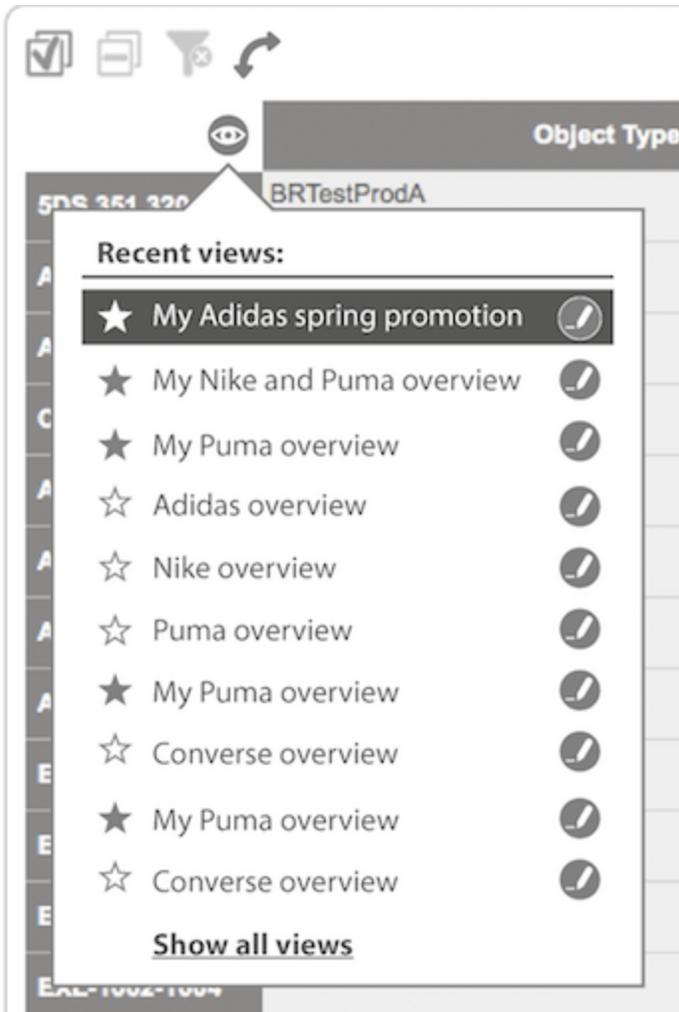
---

**Tip:** Configuring a view can only be done when using the Multi Edit display mode.

---

## Open User Configurable View

Opening the pop-up dialog for User Configurable View is done by clicking the small eye next to the table.

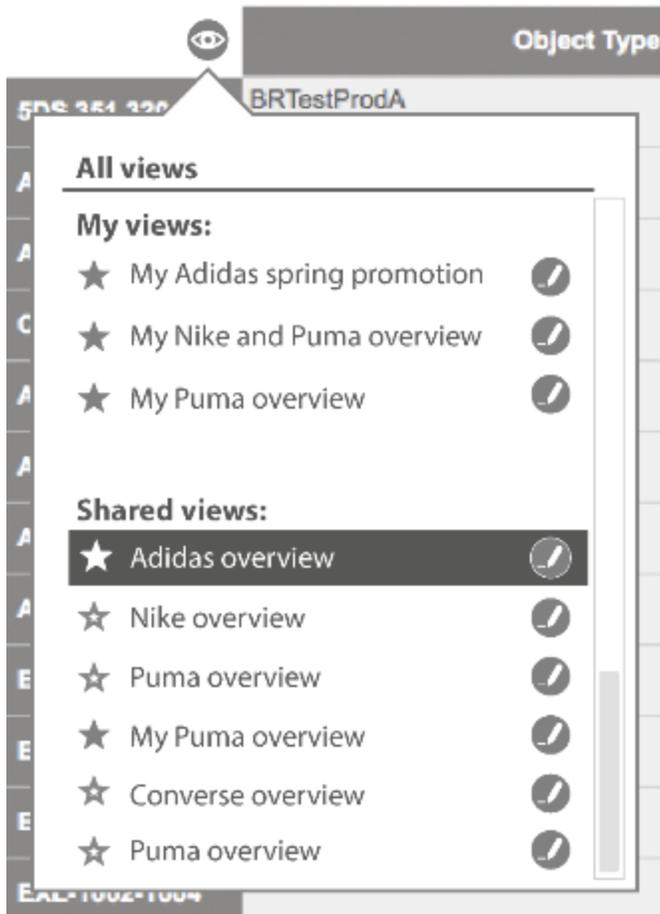


## Recent Views

The Recent View is the first thing that meets the user. It is a shortlist of the last ten views that the user has used. The list changes dynamically as the user uses the views. Last used view is placed in the top.

## All Views

In the bottom of Recent View, there is a link to All Views. Under the “Show all views” the user has the possibility to see all the views that they have saved or the views that have been shared with the user by other users -or- that the user has shared with other users.



## Edit a View

When clicking the small pencil icon next to the individual views, the user gets the option to edit, rename, delete or copy that particular view. When choosing the edit option an Edit dialog is opened with information about columns of selected view. Here the user can perform the following changes to the selected view:

- Add attributes / attribute groups as columns using suggesting box (type ahead) or a node picker. The user can not remove or add other types of headers.
- Drag the displayed columns up and down via the drag handles to change the sequence in the list
- Remove attributes / attribute groups columns from the list
- Save changes to an existing view or save as a new view

Object Type	Name	ID
SDS 351 320-001	BRTestProdA	0105-SDS_351.320-001
AAA	molupgoldsource	MGPProc8224
AB_1	molupgoldsource	MGPProc8225
CC	molupgoldsource	MGPProc8226
AC200-201	Product	AC200-201
AC200-202	Product	AC200-202
AC200-207	Product	AC200-207
AC-8245-88	Product	AC-8245-88
EXL-1002-1001	Product	EXL-1002-1001
EXL-1002-1002	Product	EXL-1002-1002
EXL-1002-1003	Product	EXL-1002-1003
EXL-1002-1004	Product	EXL-1002-1004
EXL-1002-1005	Product	EXL-1002-1005
EXL-1002-1006	Product	EXL-1002-1006
EXL-1002-1007	Product	EXL-1002-1007
EXL-1002-1008	Product	EXL-1002-1008
EXL-1002-1009	Product	EXL-1002-1009
EXL-1002-1010	Product	EXL-1002-1010
EXL-1002-1011	Product	EXL-1002-1011
EXL-1002-1012	Product	EXL-1002-1012
EXV-2002-1001	Product	EXV-2002-1001
EXV-2002-1002	Product	EXV-2002-1002

Visible columns in: My Adidas view

- Header 1
- Header 2
- Header 3
- Value 1
- Value Group 1
- Value 2
- Value 3
- Value Group 2
- Value 4
- Value 5
- Value Group 3
- Value 6
- Value 7

Save

### Sharing a View

Users with a Share User Settings privilege (set in the Workbench) can share views to the groups that the user is a member of. Shared views can not be edited or shared by others users. Only the user who created the shared view can edit / share.

## Workflows in Web UI

While workflow setup is done in workbench, working with workflow tasks can easily be done within Web UI. The Web UI workflow documentation is divided up into two main sections.

- **Getting Started with Workflows in Web UI** is for both administrators and end users. The **Screen / Component Configuration and Mappings for Workflows** section outlines information needed for those who will be configuring the Web UI screen properties and components. And, **Working with Tasks in Workflows in Web UI** provides information for end users.
- **Advanced Web UI Workflow Topics** covers advanced topics that may not be used with every workflow. It is great information to read through and know once you have a solid grasp of workflows and interacting with them in Web UI.

---

**Important:** It is recommended that before you start working with workflows that you are familiar with all of the **Workflows** documentation and read the **Getting Started with STEP Workflows** material in order it appears, as topics build upon one another. Of particular interest to all users, regardless of your role (setup vs. end user) and whether or not you are using Web UI, is the **Workflow Terminology** topic and **Workflow Related Privileges** topic.

---

## Getting Started with Workflows in Web UI

This portion of the material is a combination of screen and component configurations required for end users to effectively work with workflows within the Web UI, and steps the end user should follow to initiate objects into workflows as well as instructions for working with tasks.

Administrators will find setup information in the **Screen / Component Configuration and Mappings for Workflows** section.

If you are concerned only with the end user functionality, as opposed to designing and configuring components and screens, you may wish to skip directly to the **Working with Tasks in Workflows** section. The material is shown in the left-side navigation menu in the suggested reading order, as topics build upon each other.

# Screen / Component Configuration and Mappings for Workflows

The details for configuring views and mappings are covered in the topics in this section. If users are going to work with workflows in Web UI, all the screens and components have to be configured for use with workflows. Any screen and workflow state mappings will also need to be created. This all ensures that users have access to the right information to complete their tasks and streamlines the work process.

The screen / component configuration determines what displays to the user and determines how a user is able to work with tasks. This is similar to the 'views' concept explained for viewing workflow information in workbench. When configuring a workflow it is important to decide what data is visible for objects (views), and define which states to display (mappings). Without views and mappings configured, all the information for a workflow will be limited to what displays within a Status Selector, leaving it impossible to work with workflows effectively within Web UI.

This section provides details regarding the components and screens that can be configured. Your setup will be dependent on your business needs, so examples and information may not match exactly with what you will create. However, it does provide a guidance and examples on what can be done.

Before configuring screens and components, or mappings, it is important to be aware of the following points:

- The views and mappings configured in Web UI only apply to Web UI. If users will not be interacting with workflows in the Web UI, it is not necessary to configure components / screens or set up Web UI mappings. Instead, set up views and mappings in workbench using the STEP Workflow Designer. Details can be found in the **Getting Started with STEP Workflows** section of the **Workflows** documentation.
- A screen can contain both object and workflow-specific data. This means that a view can contain attributes, attribute groups, and aspects information specific to the object (such as name, ID, approval status, etc) as well as elements like workflow assignee, deadline, workflow variables, and workflow attachments.

## Status Selector Homepage Widget

The Status Selector widget is the starting point for users who want to work with a workflow in Web UI. As its name implies, the **Status Selector Homepage Widget** displays on the Web UI homepage, and its main purpose is to show states and the number of tasks in each state in a particular workflow. Upon clicking one of the displayed states, users will be navigated to a screen in which they can work with an individual task or multiple tasks. The screen that a user sees to work with the tasks depends on how the widget is configured. There are a number of possibilities, including the Task List screen, a Workflow Screen, or an Advanced Search screen.

Since each widget is configured for a single workflow, multiple widgets can be set up and used as needed. Each Status Selector Homepage Widget is highly configurable and can be set up to display:

If configured properly, a user can initiate tasks into a workflow, track tasks, and see what status flags they have (if applicable).

If interested in using a widget that has the same functionality but is displayed within one of the Web UI side panels, see the **Status Selector Sidebar Widget** topic.

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**Note:** From this point on, it is assumed that the workflow the widget will interact with is already set up in workbench.

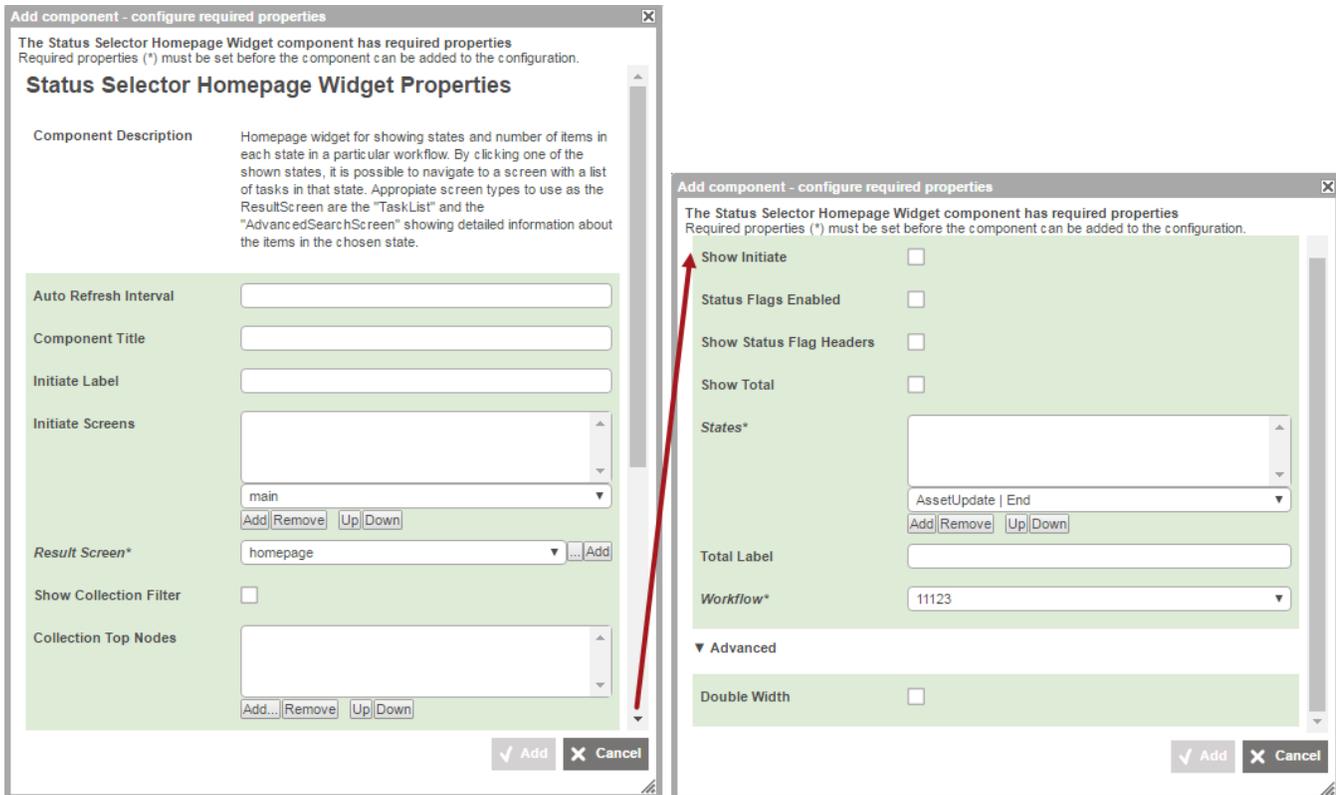
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### Adding a Status Selector Widget

The Status Selector Homepage Widget must be added to the homepage prior to configuration. Follow the standard procedure, which is detailed in the **Adding Widgets to the Homepage** section of the **Homepage Widgets** topic.

### Setting up the Status Selector Homepage Widget Properties

The Status Selector Homepage Widget Properties is shown below as two separate windows; however, it is actually just one dialog window. Users need to scroll down to view / configure all the parameters available.

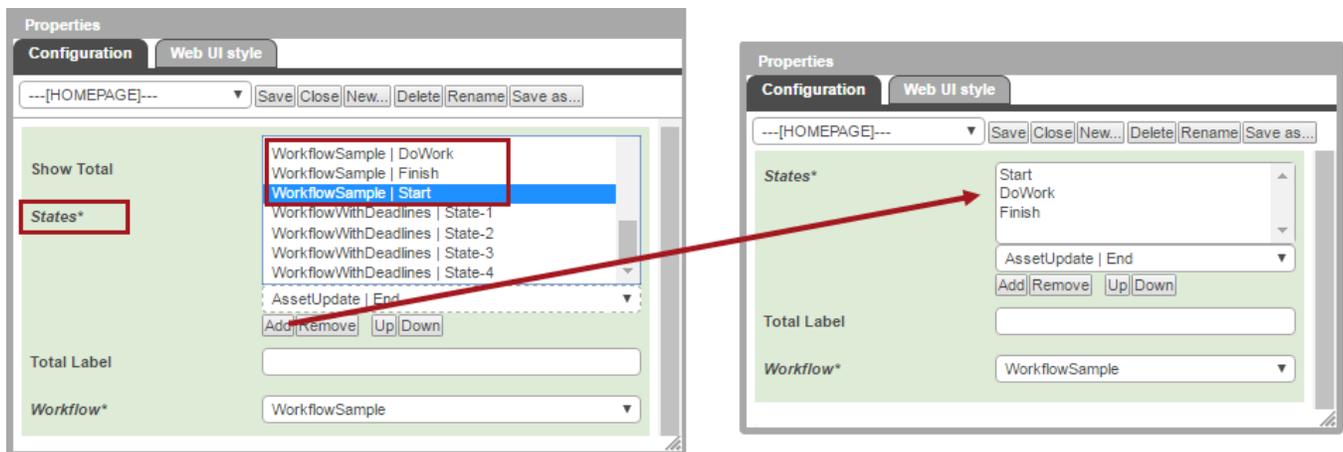


Status Selector Homepage Widget Properties can be saved as long as the workflow, the results screen, and at least one workflow state is configured. Below, the steps to set up these required parameters are listed first and then the remaining parameters go in order from top to bottom as listed within the properties.

## Required Parameters

1. Towards the bottom of the properties, you will find the **Workflow\*** parameter. Using the dropdown select the ID of the workflow you will be working with using the Status Selector.
2. Next, for **States\***, click the dropdown to see all the states within all workflows, which are listed by workflow ID and then the state ID. Look for the states that are in the workflow you selected in Step 1. Once you have selected a state, click the **Add** button. Continue this process until all the states you need are added. Use the Up and Down buttons to reorganize the states as they will display within the Status Selector in the order they are listed in the Properties (top to bottom).

In the screenshot below, the workflow ID is WorkflowSample and the three applicable states are 'Start,' 'DoWork,' and 'Finish.'



3. Use the **Results Screen\*** dropdown to select the screen, Task List or Advanced Search, that users will be navigated to upon clicking a workflow state.

If the desired screen has not been created yet, click the Add button to the right of the field and follow the typical steps for creating a new screen. The screen ID of the newly created screen will be selected once the process is complete.

If using an Advanced Search screen and wanting to further filter the task list, you can designate a specific (previously saved) search to use when navigated to the Advanced Search screen upon state selection. Simply click the ellipsis button and select a search from the Saved Search dropdown. Save the selection.

Click **Save** in the designer window to save the changes you have made up to this point

## Additional Parameters

4. Set an **Auto Refresh Interval**, if desired. Enter, in seconds, how much time should pass before the Status Selector is automatically updated. Enter 0 to disable automatic updates. If you leave the field blank, it defaults to 0 upon saving the Properties.
 

Disabling the functionality means that you will only see updates to the number of tasks in each state when the Web UI screen is refreshed (logging in and out; navigating to another page and then back to the homepage) versus automatic updates to the info displayed on the Status Selector without user intervention.
5. If you want to give the Status Selector a specific title, enter the text in the **Component Title** field. The workflow name automatically populates as the title when this field is blank.
6. If you want an initiate object link to display in the Status Selector as a way for user to create / initiate objects into the designated workflow, then enable the **Show Initiate** parameter. Also, insert text to be used for the link in **Initiate Label**. If you leave the label field blank, then 'Initiate' will automatically populate the field after saving the Properties.

If the **Show Initiate** option is enabled (checked), a selection needs to be made for **Initiate Screens** using the dropdown. Make a selection, and then click Add. Repeat the process to add additional screens. The screen links will appear in order (top to bottom). Use Up and Down to reorganize as needed.

- Click the **Status Flags Enabled** checkbox if you use Status Flags and want the task count within the Status Selector to be grouped by Status Flag (columns) in addition to states (rows). While workflow state names are clickable and show all tasks within that particular state, clicking on a number under a Status Flag header gives you just the tasks within that state row that have that status.

Additionally, if you want the headers to display above the columns, enable **Show Status Flag Headers**.

- Enable the **Show Total** checkbox to add a row below all the workflow states that totals all the tasks. Also, the **Total Label** defaults to 'Total' upon save and can be kept as-is or alternate text can be entered into the parameter field.
- Click the **Advanced Heading** to display the **Double Width** parameter. By clicking the checkbox, you double the display width of the Status Selector widget. You may wish to enable this parameter if you are using multiple status flags and want to see all the columns at one time, or you desire a bit more space between the columns.

In the example below, standard size is shown on the left and double width is shown on the right.

Initiate	Critical	Normal	Error	High
<u>Start</u>	3	0	0	0
<u>Do Work</u>	0	0	0	0
<u>Finish</u>	0	0	0	0
<u>Total</u>	3	0	0	0

Initiate	Critical	Normal	Error	High
<u>Start</u>	3	0	0	0
<u>Do Work</u>	0	10	0	0
<u>Finish</u>	0	0	0	0
<u>Total</u>	3	10	0	0

Again, click **Save** in the designer window to save the changes you have made up to this point

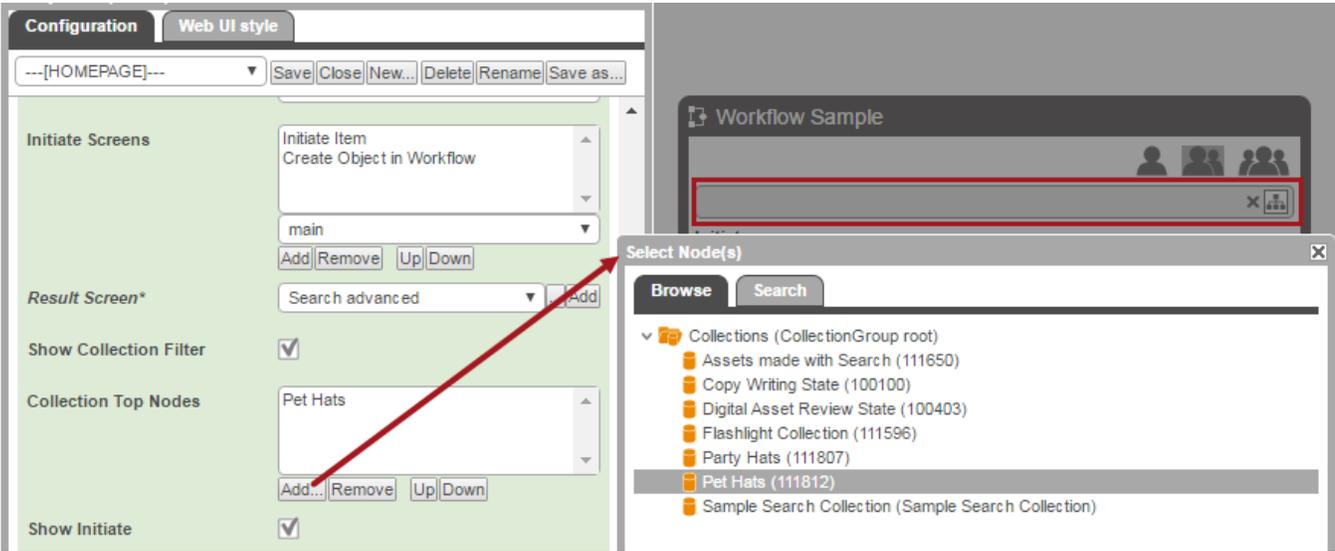
## Setting up Collections Viewing

Collections are containers for storing sets of objects, and collection groups are containers that can hold collections or other collection groups. A collection can be applied as a filter limiting the available objects to the ones present in the chosen collection. Collections are typically used in relation to Bulk Update functionality.

To make use of Collections Filtering in Web UI, initial setup needs to take in place in STEP Workbench and be in place before starting the next steps. Permissions for viewing and working with collections are also configured in workbench. For more on collections, see **Collections and Collection Groups** in the **System Setup / Super User Guide** documentation.

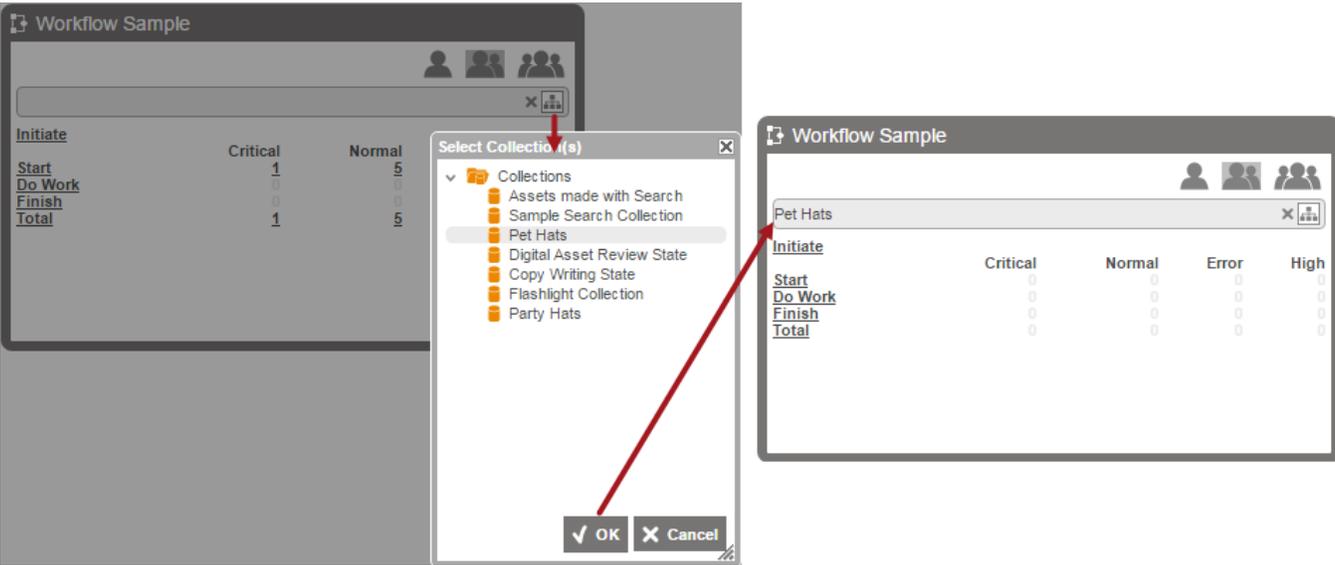
- Select **Show Collections Filter** to show collections.
- Add any **Collections Top Node Filters** to further narrow down the collection or collections accessible to users. Click Add, and make a selection or selections, and then click OK. The selections can be reorganized as

needed.



**Save** the changes and **Close** the designer window.

Only collections available to the user or user group will be shown when configured properly. The user can then filter the states based on the collection or collection group selected.



For more information on end-users tasks such as initiating objects into a workflow and working with states and tasks within the Status Selector Homepage Widget, see the **Working with Tasks in Workflows** section of the **Workflows in Web UI** documentation.

## Status Selector Sidebar Widget

The Status Selector widget is the starting point for users who want to work with a workflow in Web UI. The **Status Selector Sidebar Widget** displays within a side panel, and its main purpose is to show states and the number of tasks in each state in a particular workflow. Upon clicking one of the displayed states, users will be navigated to a screen in which they can work with an individual task or multiple tasks. The screen that a user sees to work with the tasks depends on how the widget is configured. There are a number of possibilities, including the Task List screen, a Workflow Screen, or an Advanced Search screen.

Since each widget is configured for a single workflow, multiple widgets can be set up and used as needed. Each Status Selector Sidebar Widget is highly configurable. If configured properly, a user can initiate tasks into a workflow, track tasks, and see what status flags they have (if applicable).

If interested in using a widget that has the same functionality but is displayed on the homepage, see the **Status Selector Homepage Widget** topic.

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**Note:** From this point on, it is assumed that the workflow the widget will interact with is already set up in workbench.

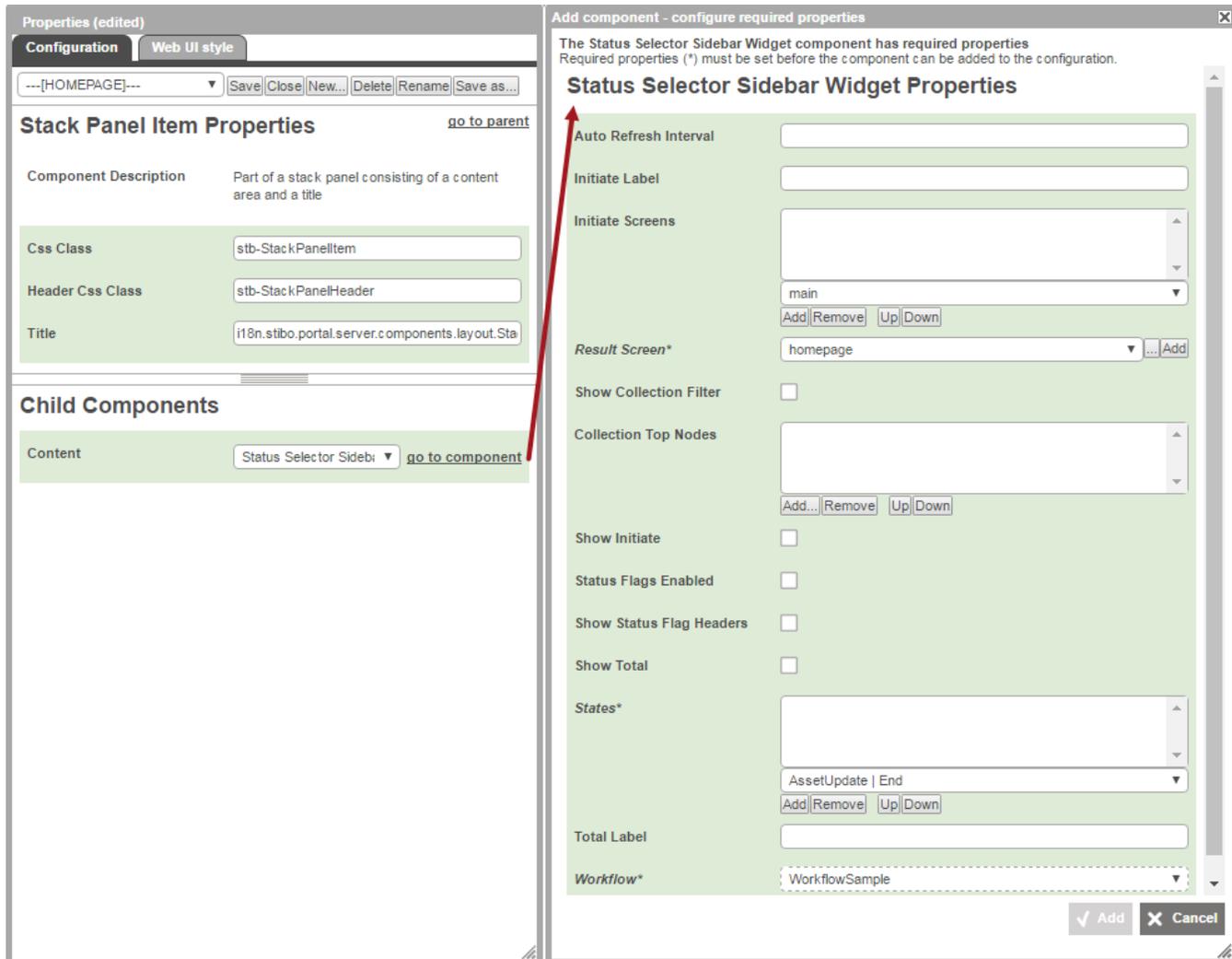
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### Adding a Status Selector Widget

The Status Selector Sidebar Widget needs to be added as a Stack Panel Item in Main Properties prior to configuration. Follow the standard procedure, which is detailed in the **Main Properties** topic of the **Using a Web UI** documentation.

### Setting up the Status Selector Sidebar Widget Properties

The Status Selector Sidebar Widget Properties is shown below as two separate windows; however, it is actually just one dialog window. Users need to scroll down to view / configure all the parameters available.



Status Selector Sidebar Widget Properties can be saved as long as the workflow, the results screen, and at least one workflow state is configured. Below, the steps to set up these required parameters are listed first and then the remaining parameters go in order from top to bottom as listed within the properties.

## Required Parameters

1. Towards the bottom of the properties, you will find the **Workflow\*** parameter. Using the dropdown select the ID of the workflow you will be working with using the Status Selector.
2. Next, for **States\***, click the dropdown to see all the states within all workflows, which are listed by workflow ID and then the state ID. Look for the states that are in the workflow you selected in Step 1. Once you have selected a state, click the **Add** button. Continue this process until all the states you need are added. Use the Up and Down buttons to reorganize the states as they will display within the Status Selector in the order they are listed in the Properties (top to bottom).

In the screenshot below, the workflow ID is WorkflowSample and the three applicable states are 'Start,' 'DoWork,' and 'Finish.'

3. Use the **Results Screen\*** dropdown to select the screen, Task List or Advanced Search, that users will be navigated to upon clicking a workflow state.

If the desired screen has not been created yet, click the Add button to the right of the field and follow the typical steps for creating a new screen. The screen ID of the newly created screen will be selected once the process is complete.

If using an Advanced Search screen and wanting to further filter the task list, you can designate a specific (previously saved) search to use when navigated to the Advanced Search screen upon state selection. Simply click the ellipsis button and select a search from the Saved Search dropdown. Save the selection.

Click **Save** in the designer window to save the changes you have made up to this point

## Additional Parameters

4. Set an **Auto Refresh Interval**, if desired. Enter, in seconds, how much time should pass before the Status Selector is automatically updated. Enter 0 to disable automatic updates. If you leave the field blank, it defaults to 0 upon saving the Properties.

Disabling the functionality means that you will only see updates to the number of tasks in each state when the Web UI screen is refreshed (logging in and out; navigating to another page and then back) versus automatic updates to the info displayed on the Status Selector without user intervention.

5. If you want to give the Status Selector a specific title, enter the text in the **Component Title** field. The workflow name automatically populates as the title when this field is blank.
6. If you want an initiate object link to display in the Status Selector as a way for user to create / initiate objects into the designated workflow, then enable the **Show Initiate** parameter. Also, insert text to be used for the link in **Initiate Label**. If you leave the label field blank, then 'Initiate' will automatically populate the field after saving the Properties.

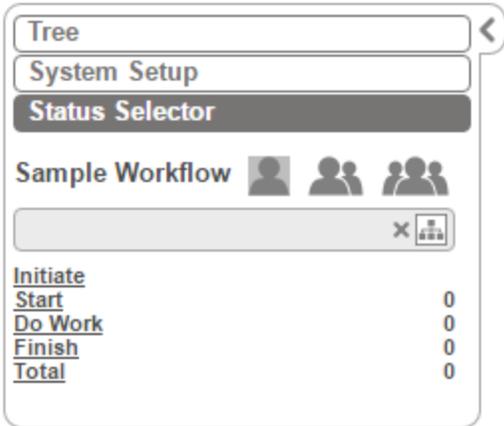
If the **Show Initiate** option is enabled (checked), a selection needs to be made for **Initiate Screens** using the dropdown. Make a selection, and then click Add. Repeat the process to add additional screens. The screen links will appear in order (top to bottom). Use Up and Down to reorganize as needed.

7. Click the **Status Flags Enabled** checkbox if you use Status Flags and want to the task count within the Status Selector to be grouped by Status Flag (columns) in addition to states (rows).

Additionally, if you want the headers to display above the columns, enable **Show Status Flag Headers**.

8. Enable the **Show Total** checkbox to add a row below all the workflow states that totals all the tasks. Also, the **Total Label** defaults to 'Total' upon save and can be kept as-is or alternate text can be entered into the parameter field.

Again, click **Save** in the designer window to save the changes you have made up to this point

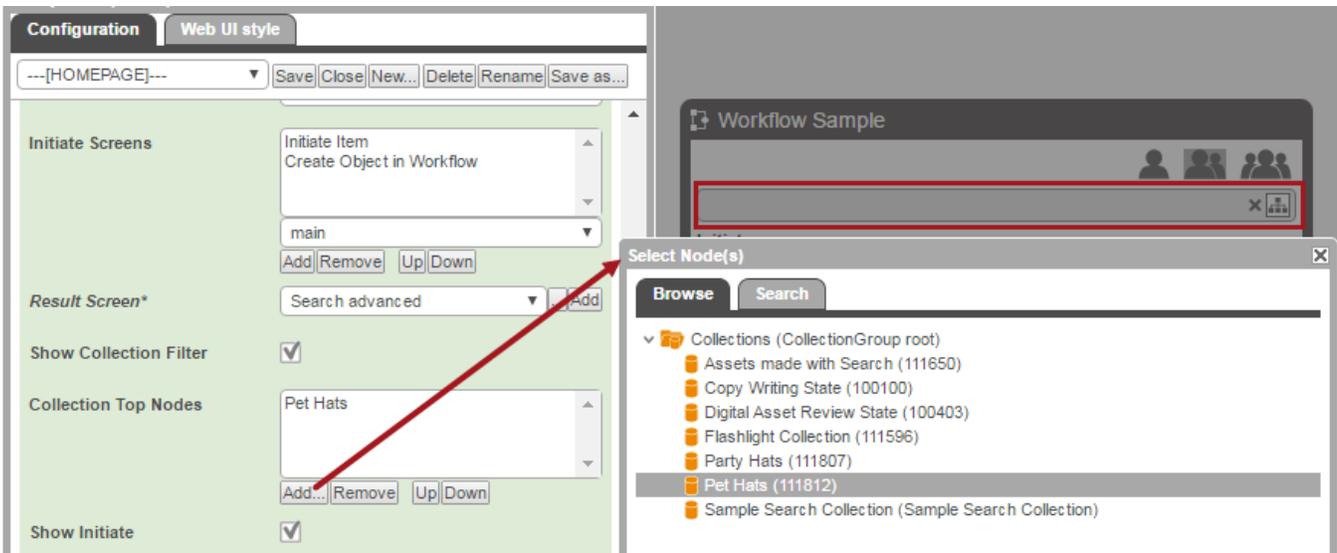


### Setting up Collections Viewing

Collections are containers for storing sets of objects, and collection groups are containers that can hold collections or other collection groups. A collection can be applied as a filter limiting the available objects to the ones present in the chosen collection. Collections are typically used in relation to Bulk Update functionality.

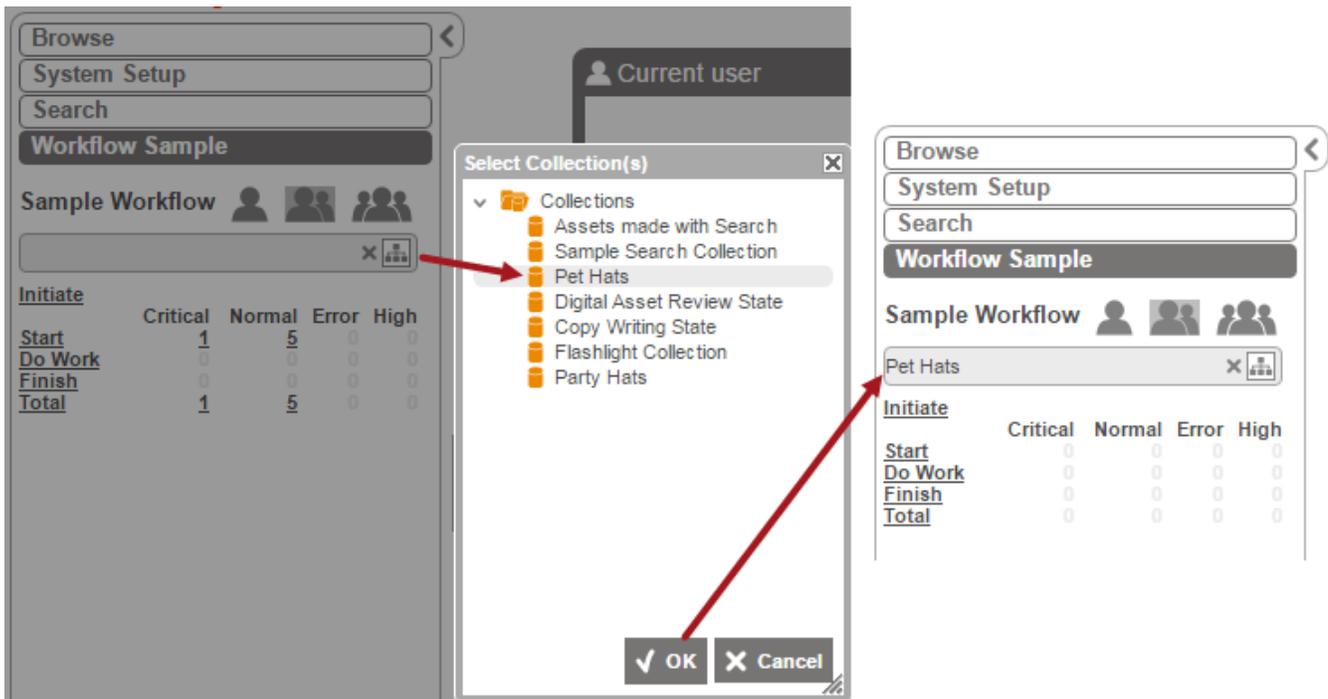
To make use of Collections Filtering in Web UI, initial setup needs to take in place in STEP Workbench and be in place before starting the next steps. Permissions for viewing and working with collections are also configured in workbench. For more on collections, see **Collections and Collection Groups** in the **System Setup / Super User Guide** documentation.

1. Select **Show Collections Filter** to show collections.
2. Add any **Collections Top Node Filters** to further narrow down the collection or collections accessible to users. Click Add, and make a selection or selections, and then click OK. The selections can be reorganized as needed.



Save the changes and Close the designer window.

Only collections available to the user or user group will be shown when configured properly. The user can then filter the states based on the collection or collection group selected.



For more information on end-users tasks such as initiating objects into a workflow and working with states and tasks within the Status Selector Sidebar Widget, see the **Working with Tasks in Workflows** section of the **Workflows in Web UI** documentation.

## Initiate Item Screen

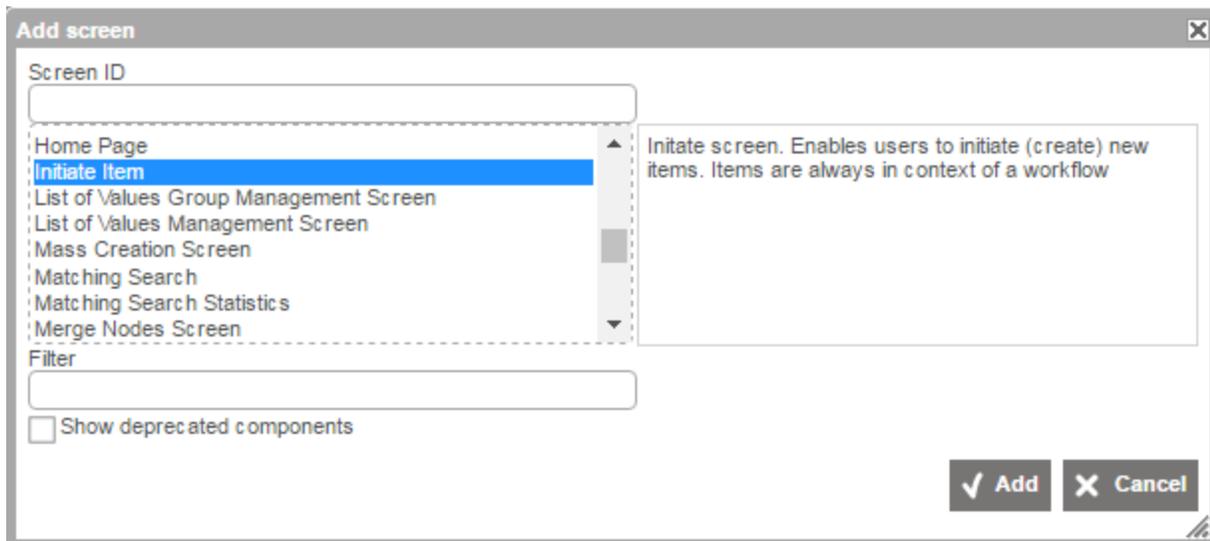
The **Initiate Item** screen is used to create new objects using STEP Web UI and initiate those objects into a workflow. Once configured, an Initiate Item screen is accessible using a Status Selector Homepage Widget and/or Status Selector Sidebar Widget.

Steps provided in this topic assume the Web UI designer is in design mode prior to starting the configuration process. For more information about getting started using a Web UI and details about design mode access / usage, see the **Web UI Getting Started** documentation.

### Adding a New Initiate Item Screen

Steps for creating a new screen using the Initiate Item screen type are below.

1. In the designer window, click the **New** button in the action icon row.
2. Choose **Initiate Item** from the screen list and type in a Screen ID. The screen ID should be something easily identifiable when it is time to configure the screen and/or set up screen mapping.

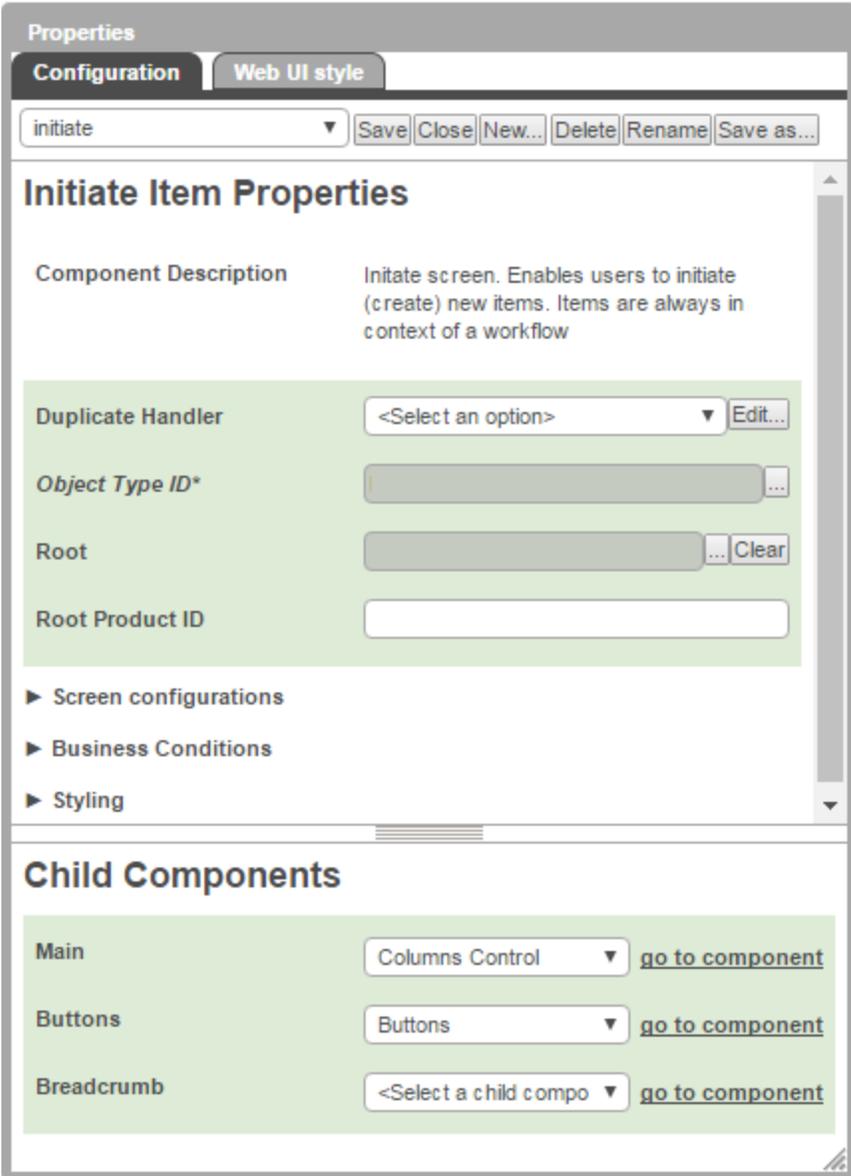


3. Click **Add**.
4. At this point, either close the designer and configure the screen at a later time, or continue on with the **Initiate Item** configuration. You must do Step 1 of the next section before you can successfully save Initiate Item Properties.

### Configuring Initiate Item Properties

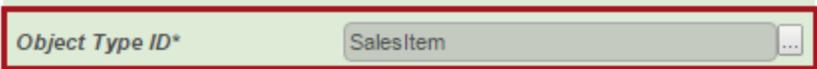
Some STEP Web UI templates include a pre-configured Initiate Item screen type with a screen ID 'initiate.' If using the existing 'initiate' screen, there may be modifications required to the default settings. These are touched on later in this topic under the **Editing Pre-configured Initiate Item Properties** section.

The steps in this topic outline how to create a new screen and configure the parameters to your data structure and can be adapted to edit an existing screen.

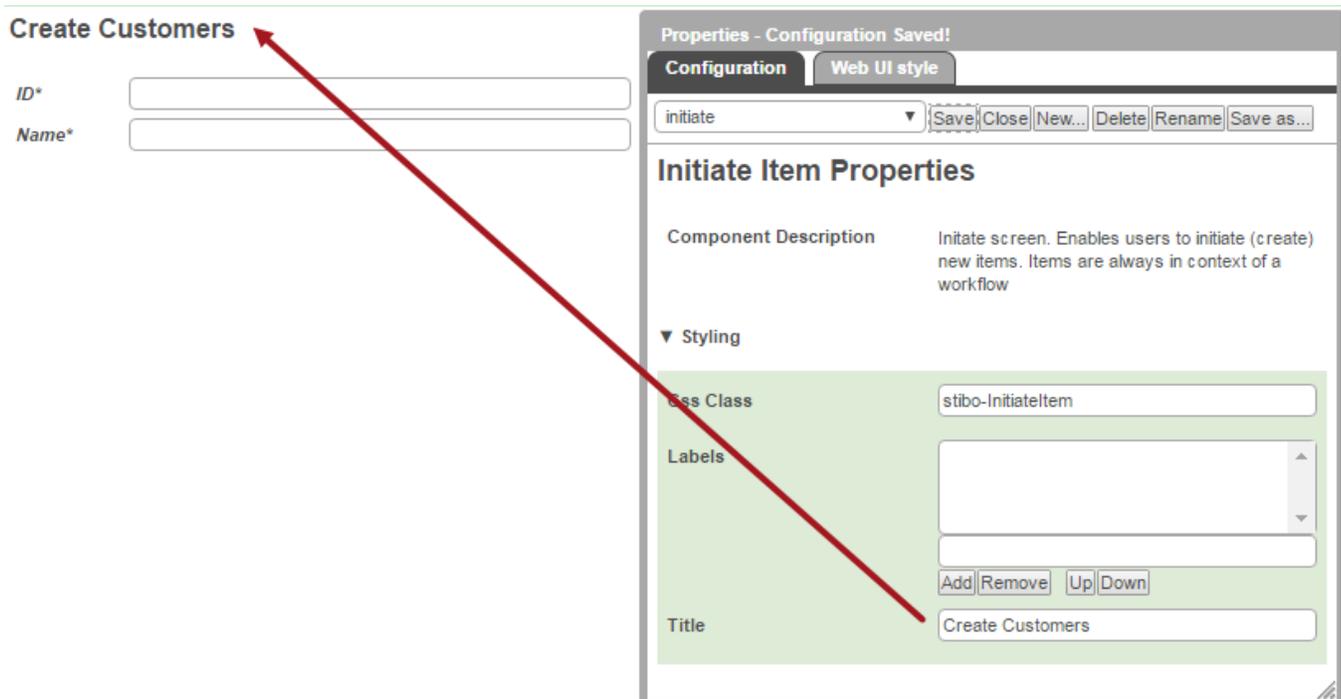


### Initiate Item Master Components

1. For the **Object Type ID** parameter; click the ellipsis button (...) to make a single selection from the 'Select Node(s)' dialog. When new objects are created using this screen, they will be created as the object type selected. In the example below, the Object Type is set to 'SalesItem.'



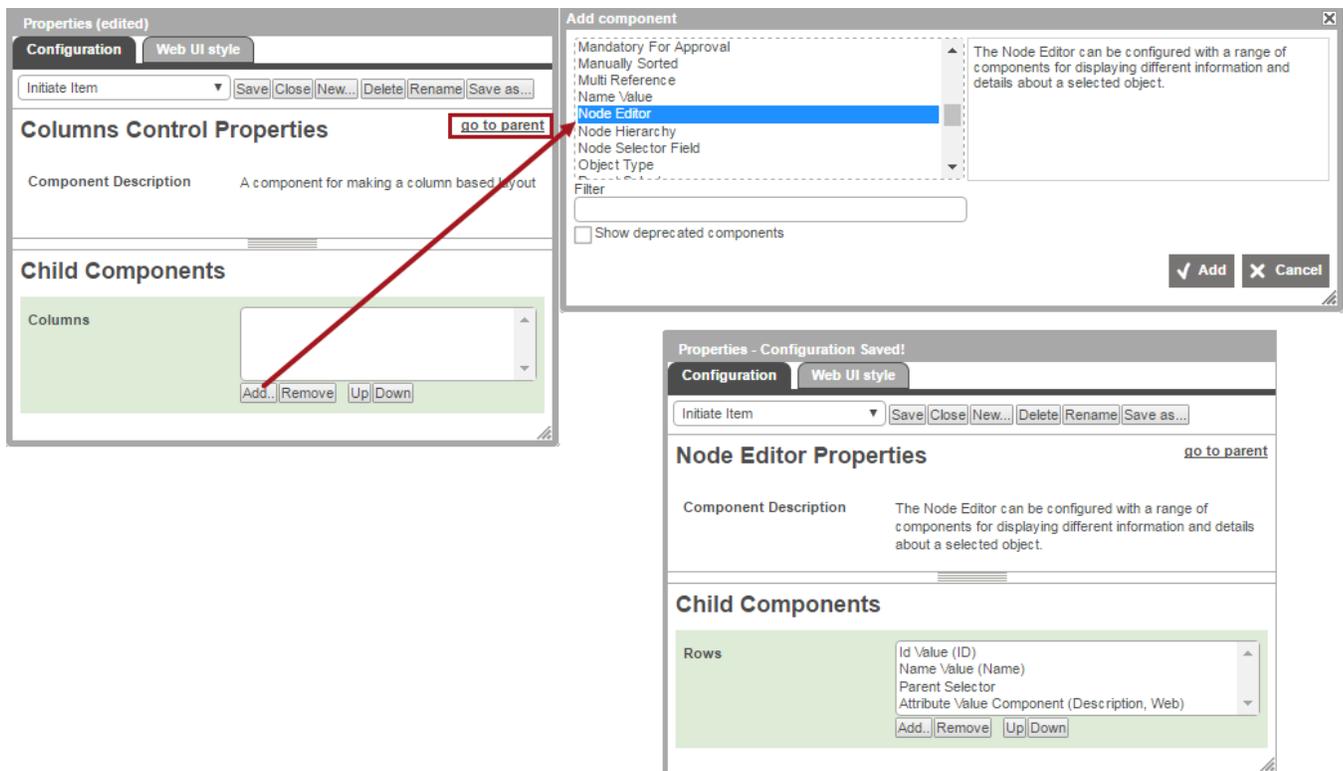
2. If all new items will be created below a specific root node, click the ellipsis button (...) to make a **Root** parameter selection. If not all new items should be created in the same location, skip this step and instead use a component on the screen that allows the user to pick the parent (see Step 4 of the **Initiate Item Child Components** section).
3. The **Root Product ID** parameter field should be blank.
4. Click **Screen configurations** to access the **Forwarding Screen** parameter. Using the dropdown, you can choose a screen (by screen ID) to forward the user to once they have initiated an item successfully. If the desired screen does not exist, one can be added and configured at a later time.
5. Click **Business Conditions** to display additional parameters:
  - **Business Conditions:** Click **Add...** to select an existing business condition to be executed to validate attribute values on the node being edited. Multiple business conditions can be added, but all must succeed for the process to continue. For more information about Business Conditions, see **Overview of Business Conditions** in the **Business Rules** documentation.
  - **Disable Auto Vendor:** Click the checkbox to disable automatic linking to the supplier (vendor classification), if desired and applicable to your Web UI usage / setup.
6. Click **Styling** to display additional parameters.
  - **Title:** The default title (Initiate Item) can be used as-is or a more descriptive title can be typed in to the value field. Titles are displayed at the top left of the screen. In the example screenshot below, the default value is overwritten with 'Create Customers.'



## Initiate Item Child Components

The options you pick may not exactly match the steps below. These components are configurable based on your setup needs and preferences. As an example, in Step 1 below, you are instructed to select Columns Control. Some Web UI setups may use Tab Control in place of Columns Control. The steps to configure a Tab Control component (or any other selection) will differ slightly than outlined below. Follow the Properties dialogs presented to you on the screen.

1. For **Child Components > Main**, choose **Columns Control** from the dropdown. Then click on **go to component**.
2. In Columns Control Properties, click the **Add** button below the Child Components > Columns field and select **Node Editor**. Click **Add**.
3. Back on Columns Control Properties, double click the **Node Editor** title in the Columns value field.
4. Click **Add** to make selections under Node Editor Properties > Child Components > Rows. These selections are the fields that will display on the Initiate Item screen as users create and initiate objects. Examples include ID Value, Name Value, Attribute Value Component, Attribute Value Group Component—anything that should have a populated value during the initial creation of an object.
  - If initiating items into different root nodes within the object structure, a component such as 'Parent Selector' can be added so that the user can select the root node for each object created. As explained earlier in this topic, if all objects should be created under one static root node, then that selection can be made in the Initiate Item Properties > Root parameter.
5. Click **go to parent** on Columns Control Properties to return to Initiate Item Properties.



6. Back on the Initiate Item Properties screen, go to **Child Component > Buttons** and select **Buttons** from the dropdown. Then, click on **go to component**.
7. On **Buttons Properties**, click the **Add** button below the Actions field, then select a component from the 'Add component' list and click **Add**. Additional configuration may be required depending on which action is selected. Here is a small sample of available Actions with brief descriptions:
  - The **Save Action** is necessary to save / create objects.
  - The **Reset Action** erases unsaved data if the user needs to clear the screen for any reason.
  - The **Find Similar Action** is used to identify similar objects prior to initiating new ones, to avoid duplicate data.

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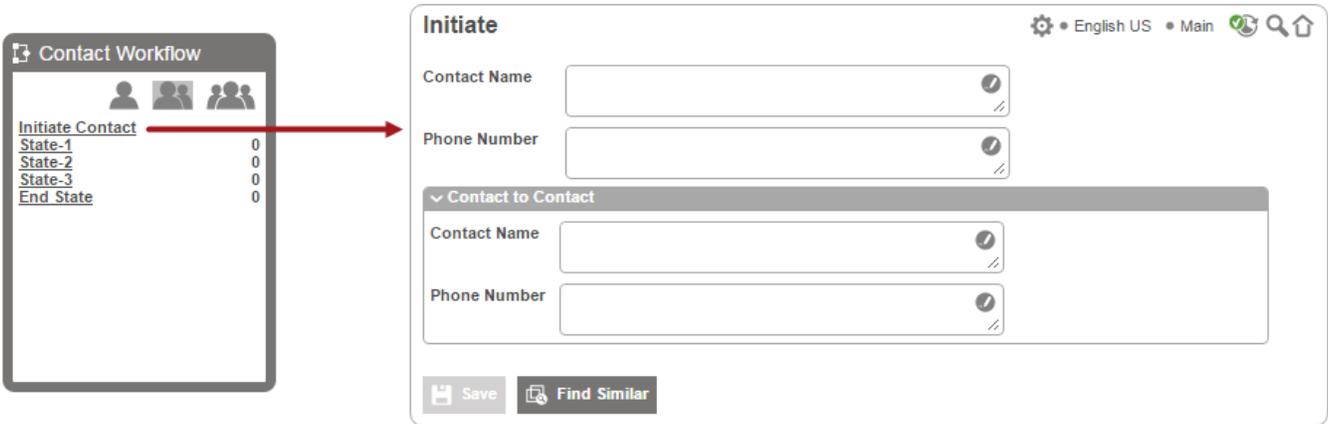
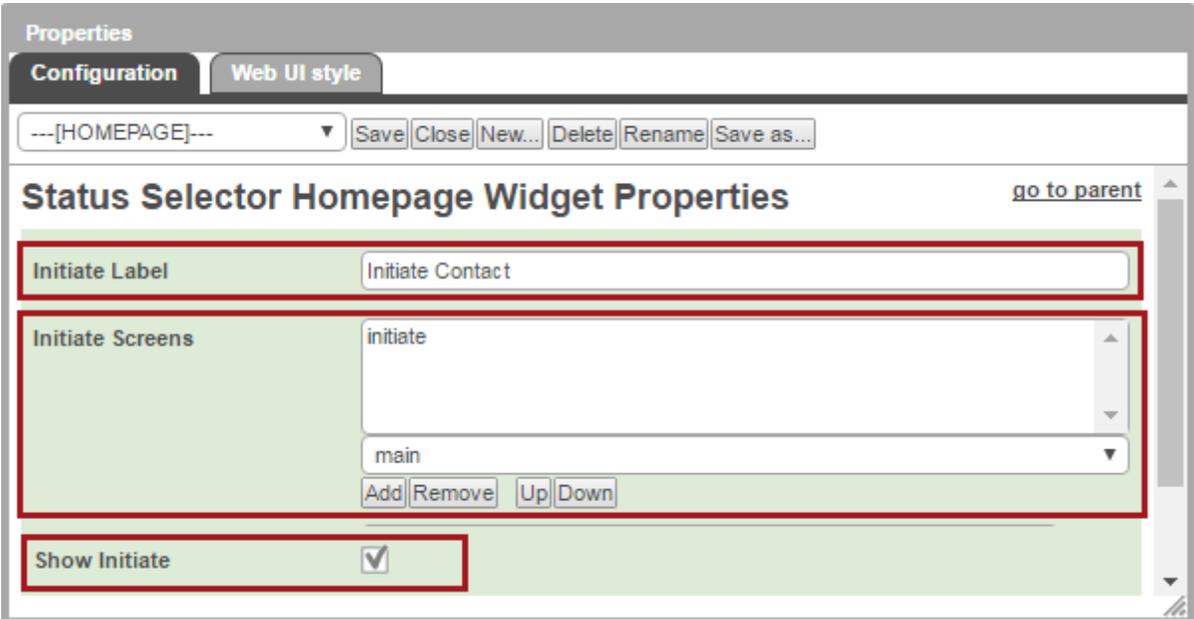
**Note:** The Initiate Item Properties > Duplicate Handler parameter is used with the Find Similar action button that is mentioned above. The specific setup required to use Find Similar functionality and the Duplicate Handler parameter is explained in the **Find Similar** section of the **Using a Web UI** documentation.

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8. Repeat the previous step as needed to add additional actions. The action buttons will display in the order they are listed in the Actions value field. Reorganize by using the Up and Down buttons.
9. Click the **Save** button in the designer.

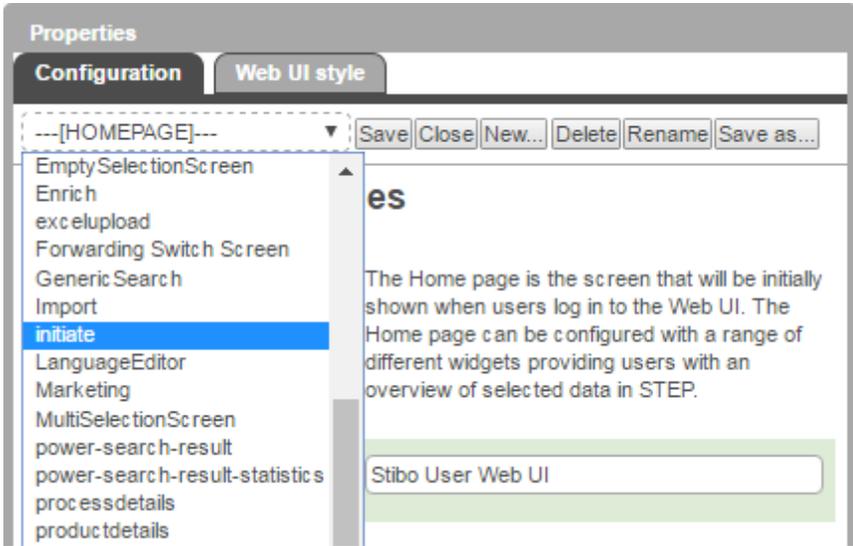
10. Click **Close** to exit design mode or use the dropdown to switch screen IDs and configure other properties.

**Important:** Initiate Item screens are accessed via status selector widgets. The appropriate screen ID must be configured as the value for the Initiate Screens parameter within Status Selector Homepage Widget Properties and/or Status Selector Sidebar Widget Properties (example screenshots below). For more information about the widgets, see the **Status Selector Homepage Widget** section in the **Web User Interfaces / Using a Web UI** documentation.



### Editing Pre-configured Initiate Item Properties

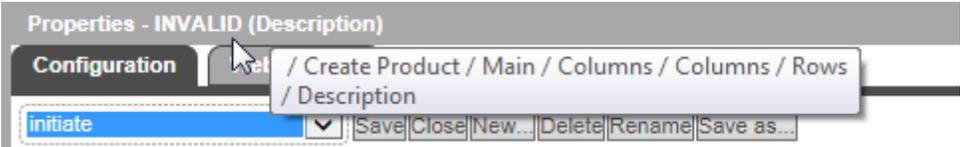
If you use one of the standard STEP templates when creating a Web UI, an Initiate Item screen type may already exist and have an 'initiate' screen ID. Below is an example from a User Web UI template.

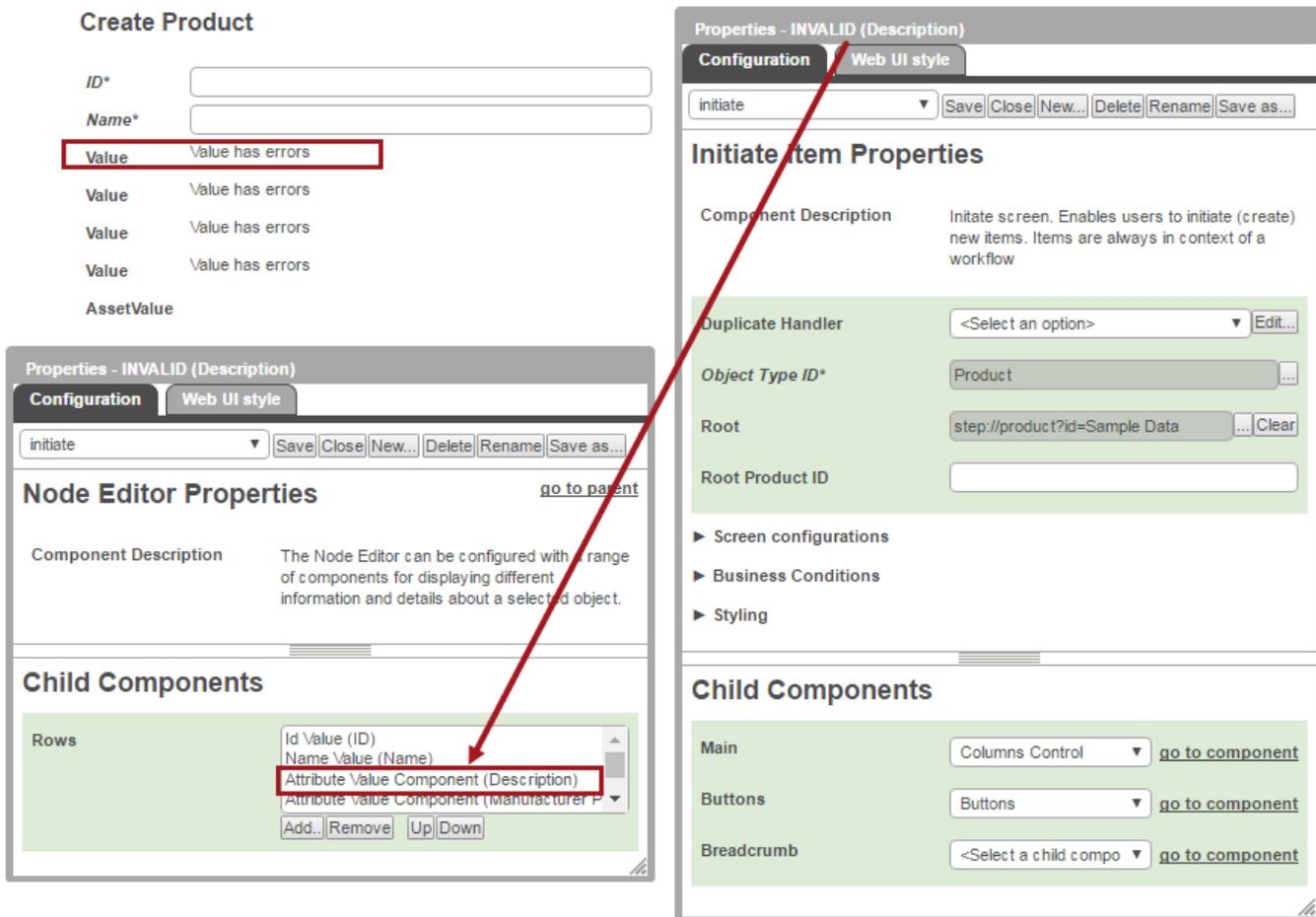


If an 'initiate' screen ID does exist, then Initiate Item Properties comes pre-configured. However, the configuration needs to be reviewed and edited to fit your data structure. If you enter design mode and the Properties dialog indicates that there are INVALID settings, you need to update and/or remove the parameters / components that are not valid for your data structure. For troubleshooting, the Properties dialog header identifies INVALID settings. Hovering over the INVALID text displays the path to the parameter / component where there is a problem.

An example is shown in the screenshot below. When accessing the pre-configured Initiate Item screen (screen ID: initiate) in designer, an INVALID (Description) message is displayed in the Properties header. Navigating to the Node Editor (via Initiate Item Properties Main > Child Components > Columns Control), you can see that the Attribute Value Component (Description) is the offending value. The Attribute Value Component can be edited to display a valid attribute, or the component can be removed from the Rows value field.

Additional errors may exist and need to be fixed using the information described above and the error messages given on the screen.





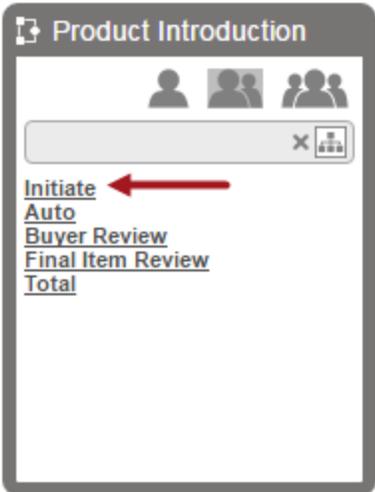
When the Properties header changes to '(edited)', invalidity issues have been fixed. Configuration can continue, and Initiate Item Properties can be saved.



## Using an Initiate Screen

A simple usage example follows:

A user clicks on the Initiate link on a Status Selector Homepage Widget.



The Initiate Item screen displays. This particular Initiate Item screen displays via a Tab Control component (Initiate Item Properties > Child Components > Main) on a Tab Page.

Once the object information is entered, the user clicks the Save button (above) and a success confirmation message displays (below).



Below is verification that the newly created object was automatically initiated into the workflow that is configured within the Status Selector Homepage Widget Properties.

**Browse**

- Products
  - Apparel
  - Footwear
  - Safety
  - Hardware
    - Tools
      - Task Lighting
        - Flashlights
          - Flashlights Items
            - 20862
            - 20883
            - LIGHTS-10**
          - Flashlights SalesIter

**Item**

Category Information    Additional Information    Packaging Hierarchy    **Status**    Revisions    Referenced By

Active in workflow states	Workflow name	Workflow state	Status
	Item Creation	Supplier Enrichment	
Revision	Date: 2016.05.18 Revision number: 0.1 Last Edited by: USER Time: 09:05:13		

## Bypassing the Initiate Item Screen

When creating new objects from a Status Selector component, users can create and initiate objects into a workflow in a single step if the object type utilizes an auto-generated ID. This allows for a more streamlined object creation by giving the option to bypass the Initiate Item screen.

By using the **Create Object in Workflow** screen type, fields for entering object data are not presented to the user since the object is created with the simple click of a button. Users can seamlessly go in post-creation to work with the object and edit data since they are auto-navigated to an editing screen (determined by the overall Web UI mappings).



## Preconditions

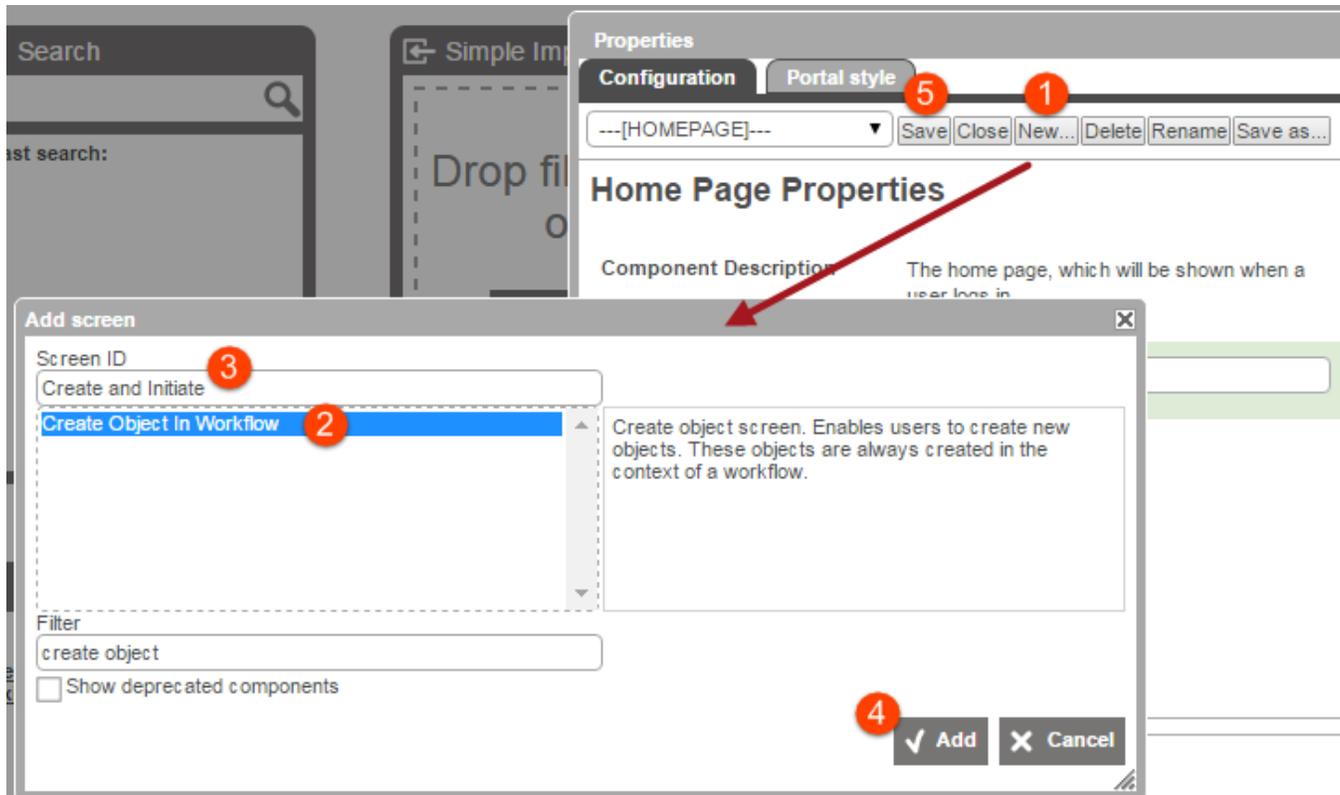
Before configuring a Create Object in Workflow screen, it is important to ensure that the data model supports the functionality and that the desired end result can be achieved. Specifically, users should be aware of the following:

1. Underlying privileges are not applied to the Create Object in Workflow screen. Therefore, only users who should be allowed to create and initiate objects into the relevant workflow should be given access to this functionality.
2. Objects created using this functionality are all created under a single common parent. It is therefore recommended that a subsequent workflow state require reparenting of the newly created objects, unless a flat hierarchy structure is desired.
3. Objects created using this functionality must use autogenerated IDs.
4. This functionality should only be used for workflows that have a single initial state. If used in within a workflow that has initial parallel states, it is not possible to specify which state they will be directed to upon creation of the object.

## Required Configuration to use the Create Object in Workflow Screen

### Step 1: Create a new screen of type 'Create Object In Workflow'

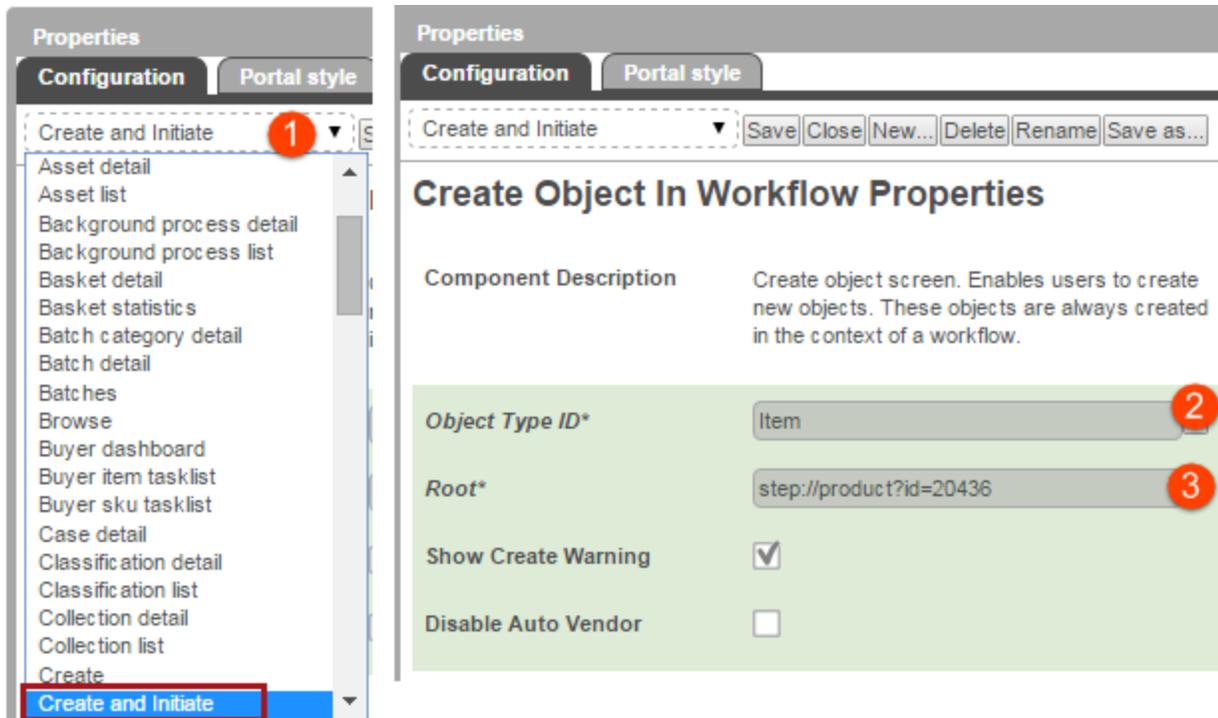
1. Click **New** in the Web UI Designer.
2. In the Add screen dialog, select the **Create Object in Workflow** screen type.
3. Populate an appropriate ID for the new screen.
4. Click **Add** in the bottom of the dialog.
5. Click **Save** in the main screen of the Web UI Designer.



## Step 2: Configure the 'Create Object in Workflow' screen

Once created, you must configure the Create Object in Workflow screen. Save the changes once complete.

1. Access the screen by selecting it from the dropdown in the Web UI Designer. Find the screen that matches the ID you populated in the previous steps.
2. Select an **Object Type ID**. This selection specifies the object type that will be applied to all new objects created via the 'Create Object in Workflow' screen. Note that the object type selected here must use an autogenerated ID.
3. Select a **Root**. This selection specifies the common parent under which all new objects created via the 'Create Object in Workflow' screen will be placed.
4. Enabled by default, **Show Create Warning** means that end users will be presented with a dialog that requires them to confirm the creation and initiation of an object upon clicking the Create Object in Workflow designated link within the Status Selector. Disable if no message should display to the user.
5. **Disable Auto Vendor** can be used to prevent automatic object linking to a vendor classification. This parameter is unchecked by default.



**Note:** All objects created using the Create Object in Workflow screen type are initially created under the same parent. It is therefore recommended that a subsequent workflow state require reparenting of the newly created objects, unless a flat hierarchy structure is desired. In addition, care should be taken in configuration to ensure that the selected object type and parent root are compatible (and valid for the workflow), else the end user will receive an error when attempting to create / initiate.

### Step 3: Configure the Status Selector Initiate Screen

The **Create Object in Workflow** screen must be mapped as the Initiate Screen in a Status Selector component (Status Selector Homepage Widget recommended, but Status Selector Widget may also be used).

**Important:** Underlying user privileges are not applied to the Create Object in Workflow screen. Therefore, only users who should be allowed to create and initiate objects into the relevant workflow should be given access to the screen.

1. Open the Web UI Designer for the selected widget.
2. In the Initiate Screens parameter, find the newly created screen in the dropdown and click **Add**.

Properties (edited)

Configuration Portal style

---[HOMEPAGE]---

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

### Status Selector Homepage Widget Properties

Component Description: Homepage widget for showing states and number of items in each state in a particular workflow. By clicking one of the shown

- Batch detail
- Batches
- Browse
- Buyer dashboard
- Buyer item tasklist
- Buyer sku tasklist
- Case detail
- Classification detail
- Classification list
- Collection detail
- Collection list
- Create
- Create and Initiate**
- CreateObjectInWorkflow
- Empty
- Forwarding Switch Screen
- GDSN cic list
- GDSN cics detail
- GDSN cics list
- GDSN data pool list

main

Add Remove Up Down

Result Screen\* Sample Workflow Task List Add

Show Collection Filter

**Sample Workflow**

Create New	
Enrich Data	7
Gather Data	4
Gather Images	7
Review Data	1
Start	3

If using the superseded Status Selector Widget (rather than the Status Selector Homepage Widget), only a single Initiate Screen can be selected. If the Status Selector Homepage Widget is used, multiple screens can be mapped. In this case, users will see a selection option for each available screen when clicking the 'Initiate' link in the widget:

→ Create and Initiate

→ Create

Initiate

Enrich Data	7
Gather Data	4
Gather Images	7
Review Data	1
Start	3

### Step 4: Complete Status Selector Configuration

Complete configuration of the Status Selector, including selection of the relevant workflow and states. Ensure that the **Show Initiate** parameter is checked. A sample configuration of the Status Selector is shown below.

**Status Selector Homepage Widget Properties** [go to parent](#)

AdvancedSearchScreen: showing detailed information about the items in the chosen state.

Auto Refresh Interval: 0

Component Title: Sample Workflow

Initiate Label: Initiate

Initiate Screens: Create and Initiate, Create, main

Result Screen\*: Sample Workflow Task List

Show Collection Filter:

**Show Initiate:**

Show Status Flag Headers:

Show Total:

States\*: Enrich\_Data, Gather\_Data, Gather\_Images, Review\_Data, AssetUpdate | End

Status Flags Enabled:

Total Label:

Workflow\*: SampleWorkflow

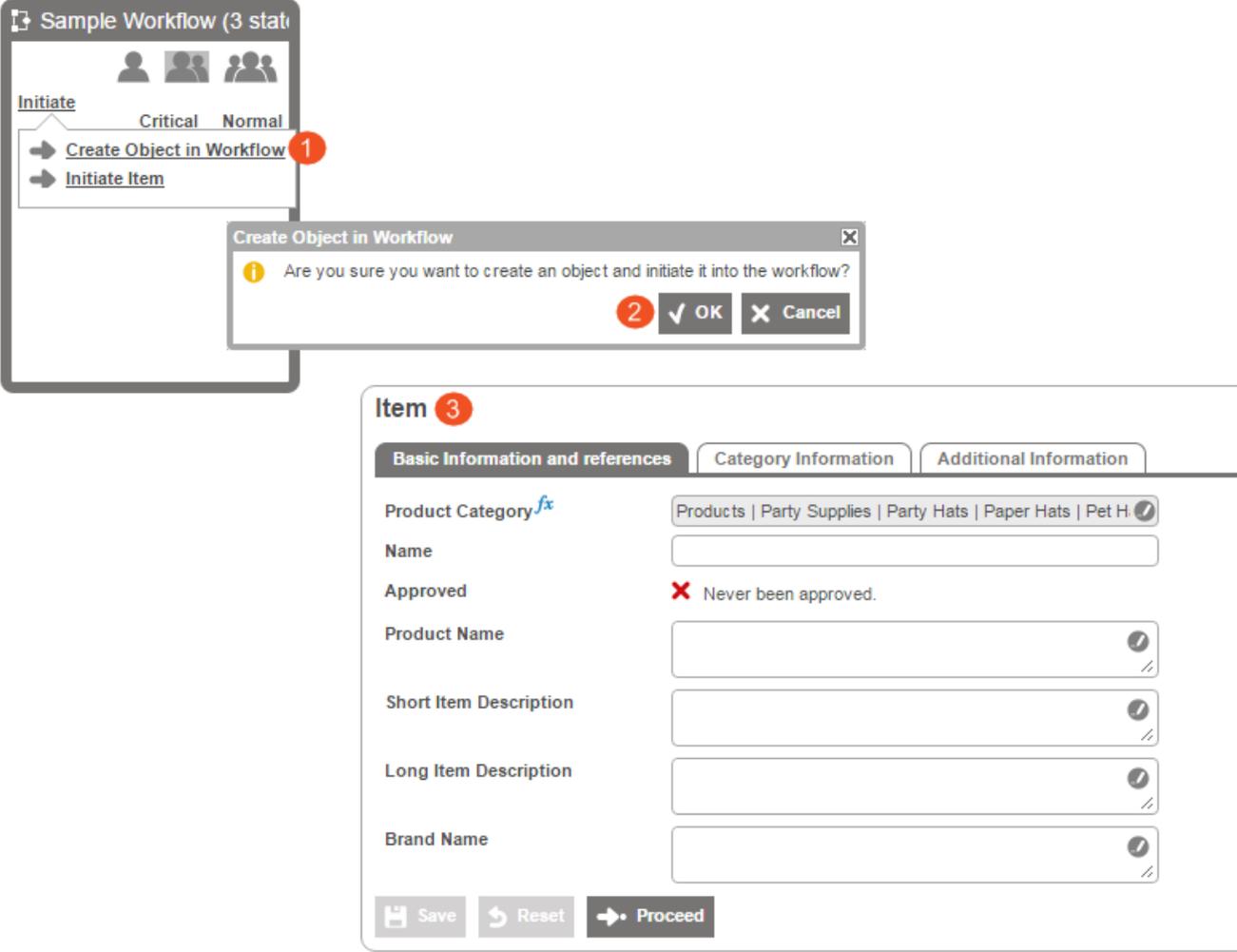
### Using the Create Object in Workflow Screen

If configured properly, end users can click on the Initiate option in the Status Selector widget to create a new object. The object will be created with an autogenerated ID, under the parent specified by the configuration, and of the object type specified by the configuration. If the warning is enabled, users will see the confirmation 'Create

Object in Workflow' dialog (as shown).

Upon creation, users are taken directly to the first screen mapping that meets the conditions applicable to the object created. Users can begin work on the object, without having to have entered an Initiate Item screen to create the object.

An example of the process is shown below:



**Note:** It is recommended that the Create Object in Workflow screen only be used for workflows that have a single start state. If, for example, business rules pass an object into parallel states upon entry to the workflow, users cannot be routed to a specific state and have the potential to see the object in either of the states in which a current task exists.

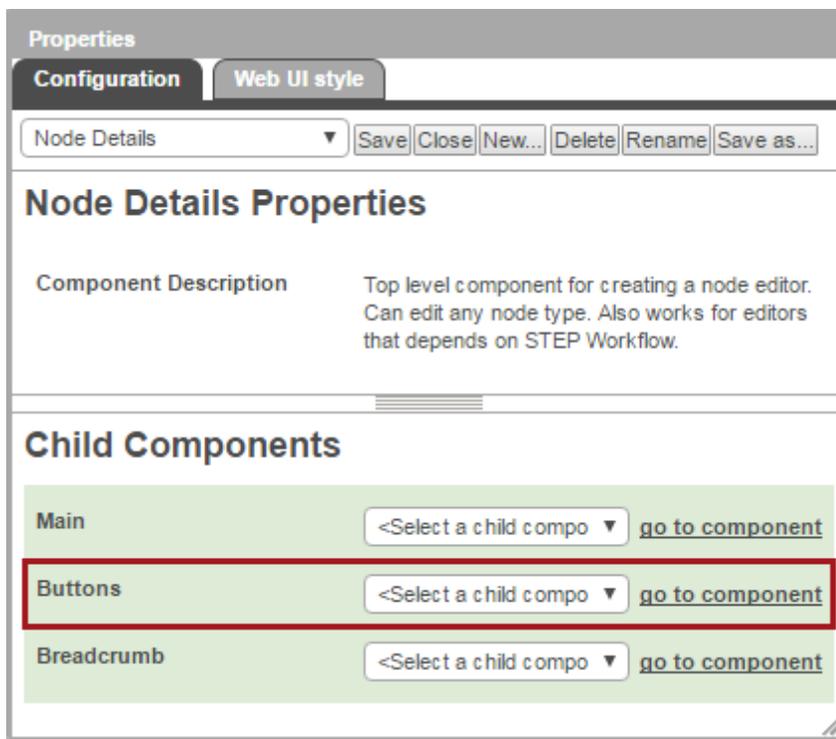
## Start Workflow Action

When working with objects in Web UI, a **Start Workflow Action** button can be added to any Node Details screen. This allows users to work with object data and then initiate the object into a workflow with a click of a button.

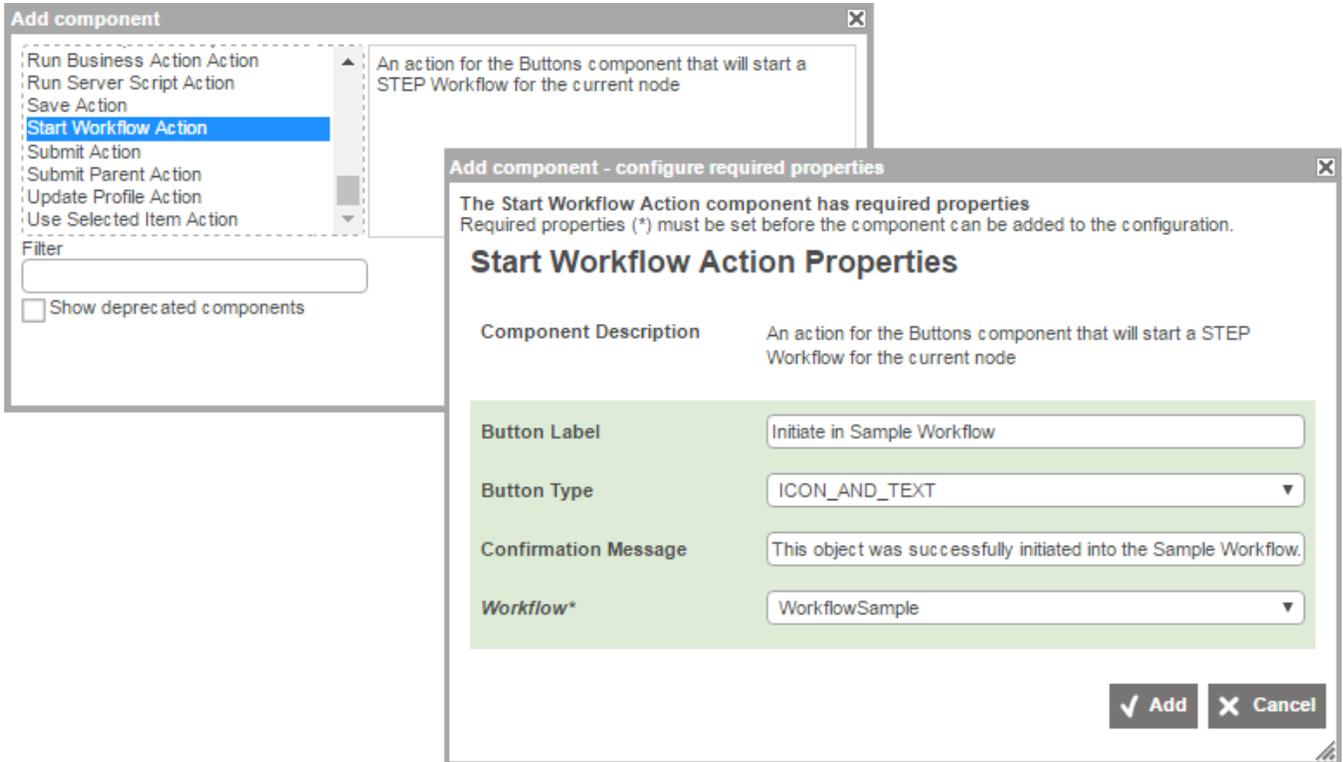
Detailed information about how to set up a Node Details screen is outlined in the **Node Details Component** topic.

Here are the steps to add / configure the button:

1. Enter the Web UI designer and selected the screen ID for the applicable Node Details screen.
2. Within Node Details Properties, select **Buttons** from the Buttons parameter dropdown, then click **go to component**.



3. On **Buttons Properties**, click the Add button below the **Actions** field, then select **Start Workflow Action** from the 'Add component' list and click **Add**.



4. Within the **Start Workflow Action Properties**, all parameters are initially blank except for Workflow (defaults to first existing workflow in STEP). Make your selections and click **Add**.

- **Workflow\*** is the only required setting. This is the workflow that you want to initiate items into.
- The **Button Label** is the text you want to appear in the button displayed on screen.
- Select from ICON\_AND\_TEXT, ICON, and TEXT using the **Button Type** dropdown. If you select TEXT or ICON\_AND\_TEXT and the Button Label parameter is empty, the default text 'Start STEP Workflow' will display.

Button Types	Button Displayed As
ICON	
TEXT	
ICON_AND_TEXT	

- The **Confirmation Message** will display to the user once a successful initiation of the object is complete. If the parameter is left blank, a 'STEP Workflow "Sample Workflow (3 states) with Variables" has been started'

message will display, with the name of the workflow displaying within the quotation marks.

2. Click the **Save** button in the designer and **Close**.

See **Initiating Objects in a Workflow using Web UI** for information regarding how to use initiate an object in to a workflow using the Start Workflow Action.

# Task List

A **Task List** is used for displaying total objects in a selected workflow, objects within a specific workflow state, and if applicable, tasks by Status Flag. To use a Task List, it must be configured as a results screen for a **Status Selector (Homepage / Sidebar) Widget** and be configured with a **Node List**.

This topic gives you information regarding how to set up a Task List. Information regarding how to use a Task List is included in the **Moving Tasks Through a Workflow in Web UI** topic .

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**Note:** If you are using an Advanced Search Screen as a task list, then setup is similar when it comes to the Node List component (starting with Step 7 under Configuring Task List Properties). The only major difference is the absence of the Status Flag Header and Workflow Variable Header as options available within the Multi Edit Display Mode Properties. For more information about Advanced Search Screen setup, so the **Advanced Search** section in the **Using a Web UI** documentation.

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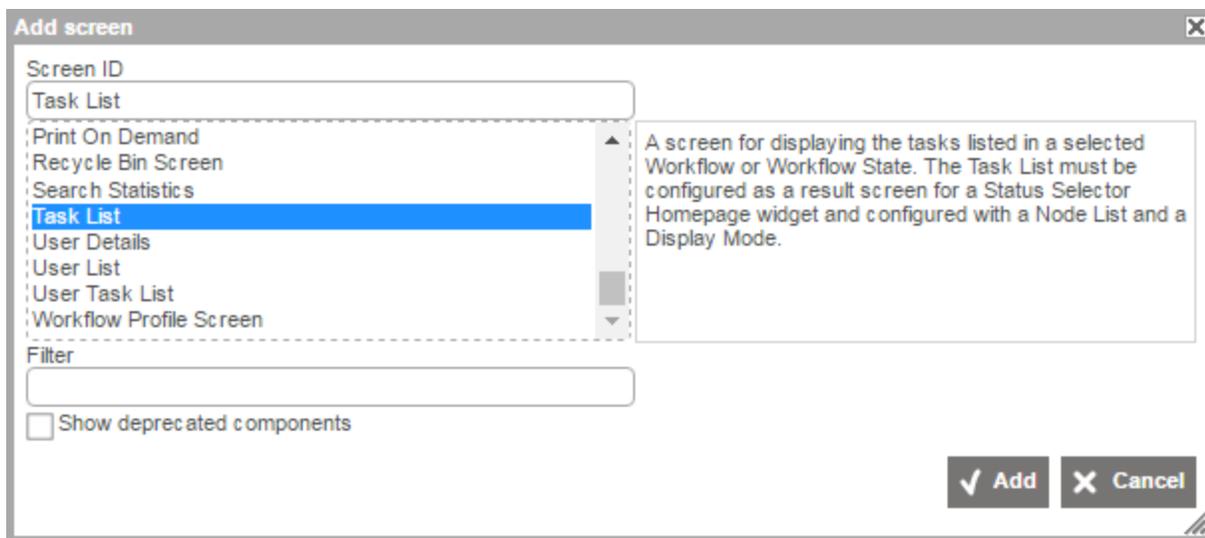
## Prerequisites

It is expected that anyone configuring the Task List screen is familiar with the Web UI Designer, as basic concepts for working with the designer are not covered in this section. The user must have appropriate privileges to access the designer. Additional information can be found in the **Designer Access** section of the **Web UI Getting Started** documentation.

Additionally, to follow the use-case examples in any of the workflow topics, the STEP user should have all workflow related privileges.

## Adding a New Task List Screen

Steps for creating a new screen are outlined in the **Creating a New Screen** section of the **Design Mode Basics** topic. Select 'Task List' as the screen type (shown in the screenshot below).



## Configuring Task List Properties

Once a new screen is created, you can configure it. If you are not already seeing the properties for the screen you just created, then select the screen ID from the designer dropdown list. In the example below, the screen ID is 'Task List.'

The screenshot shows the 'Properties' window for a 'Task List' screen. The 'Configuration' tab is active. The 'Task List Properties' section includes a description: 'A screen for displaying the tasks listed in a selected Workflow or Workflow State. The Task List must be configured as a result screen for a Status Selector Homepage widget and configured with a Node List and a Display Mode.' The 'Auto Navigate On Assignment' checkbox is unchecked. The 'Advanced' section is expanded, showing 'Css Class' as 'stibo-UserTaskList' and 'Title Formatter' as 'i18n.stibo.UserTaskList.TitleFormatter'. The 'Child Components' section shows a 'Node List' dropdown menu with '<Select a child compo' and a 'go to component' link.

1. The **Auto Navigate On Assignment** parameter is disabled by default. If enabled, when a task is claimed by a user in the Task List (e.g., when a user makes an 'Assign to Me' selection), the user is automatically navigated to the editor screen at the time of assignment so that they can continue working with the task.
2. Click the **Advanced** heading to display the **Title Formatter** parameter.
3. **Title Formatter** can be left as-is to display the default 'Task List' title on the screen, or placeholders can be used in conjunction with (or in place of) static text to automatically insert workflow information within the screen title. These placeholders can be used individually or together. These placeholders are useful, for example, when mapping screens based on status flag or workflow state since this information is dynamically reflected in the screen title.

- {0} displays the Workflow ID
- {1} displays the Workflow State
- {2} displays the Workflow Name
- {3} displays the Status Flag

The Status Flag displays within the title only if applicable. If the user clicks on a link in the Status Selector that takes them to a results set that includes objects with a mix of different Status Flags, then the {3} placeholder will not populate within the screen title.

A screenshot showing the default title is displayed at the beginning of this section. A screenshot showing the placeholders within the Title Formatter parameter field is shown below along with a screenshot showing an example of an auto-populated Task List screen title (workflow ID, workflow state, workflow name, and the status flag).

▼ **Advanced**

**Css Class**

**Title Formatter**

**WorkflowSample - Start - Sample Workflow (3 states) with Variables - Critical** ⚙️ English US • Main 🔍 🏠

	ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow Navigation	Workflow status	Released By
121183	<a href="#">121183</a>	Pink & Blue Giraffe Party	Critical	<input type="checkbox"/>	Super Users	8/26/16 11:54:34 AM	<a href="#">121183</a>	Sample Workflow (3 states) with Variables:Start	
121193	<a href="#">121193</a>	Pink & Green Pom-Pom Hat	Critical	<input checked="" type="checkbox"/>	User 8		<a href="#">121193</a>	Sample Workflow (3 states) with Variables:Start	
27224	<a href="#">27224</a>	27224	Critical	<input type="checkbox"/>	Super Users	8/26/16 11:56:51 AM	<a href="#">27224</a>	Sample Workflow (3 states) with Variables:Start	

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5. Under **Child Components** > **Node List**, select **Node List** from the dropdown.
6. Click **Save** in the designer window to save all changes made up to this point.

Properties

Configuration Web UI style

Task List Save Close New... Delete Rename Save as...

### Task List Properties

**Component Description** A screen for displaying the tasks listed in a selected Workflow or Workflow State. The Task List must be configured as a result screen for a Status Selector Homepage widget and configured with a Node List and a Display Mode.

**Auto Navigate On Assignment**

▼ **Advanced**

**Css Class** stibo-UserTaskList

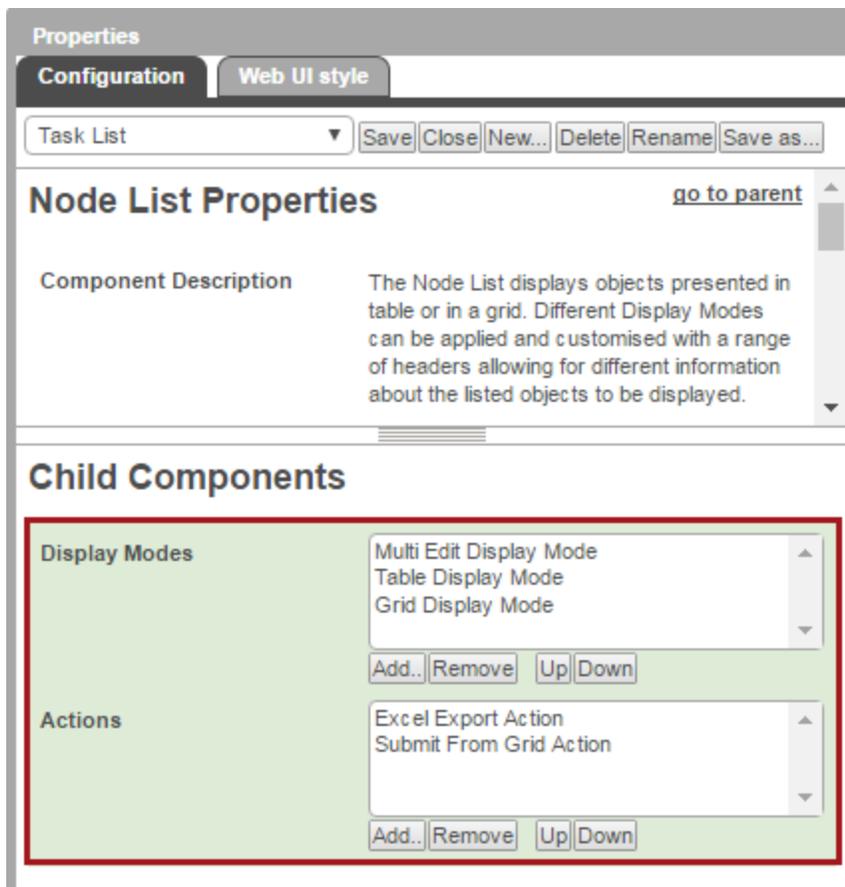
**Title Formatter** {0} - {1} - {2} - {3}

### Child Components

**Node List** Node List [go to component](#)

7. After saving, click **go to component** to the right of the **Child Components > Node List** dropdown. This opens the Node List Properties.
8. Under **Child Components > Display Modes**, you must add at least one display mode. Typically, **Multi Edit Display Mode** is used with workflows / Task List screens so that bulk updates can be made and submitted. While other display modes (e.g., Table) may be used and any number of them can be added, it is best practice to add only those truly needed to work with objects on a Task List screen. If multiple modes are configured, users are able to toggle between the different views. The name of each display mode must then be double-clicked to be configured for use.

See the next section, **Configuring Multi Edit Display Mode for a Task List Screen**, for more information.



- For **Child Components > Actions**, any applicable actions can be added. On a Task List, it is common to add the **Excel Export Actions**, **Excel Export All Action** and **Submit From Grid Action**. These action buttons will be used by end users to work with and submit tasks. Again, each of these Actions can be double-clicked and configured / customized (e.g., button titles, process description templates) according to user needs.

The Submit From Grid Action is highly customizable. This is true for the Submit Action that can be added to a Node Details screen, when working with single tasks. If any business rules logic is configured and applied, those will run when a user submits the task.

- Click **Save** in the designer window to save all changes made up to this point.

## Configuring a Multi Edit Display Mode for a Task List Screen

To work with objects in a workflow, **Multi Edit Display Mode** offers users the opportunity to bulk edit / update objects in the workflow. While this topic does not go into great detail on how to configure the Multi Edit Display Mode Properties in its entirety, it does touch on the parameters and components you will mostly likely use when working from a Task List screen.

Here are the basic steps to configure Multi Edit Display Mode within a Task List. If a particular parameter is not explained below, or you want more details, you can access help text by mousing over the area to the right of a parameter name within the properties dialog, and then clicking on the yellow icon that appears.

1. Double-click on 'Multi Edit Display Mode ' within the Node List > Child Components > Display Modes field. The **Multi Edit Display Mode Properties** will open.
2. Click on the **Add** button under the **Headers** value field and click on each header shown in the 'Add Component' dialog to view details about each header. Make a selection and then click Add. Continue this process to add all the desired Headers. They can then be edited, removed, and reordered as needed.

The following list is not an all-inclusive list of the headers you may use to populate the Node List table, but these give you an idea of what workflow-related headers you can use. These are in addition to standard headers like ID Header / ID Shared Target Header, Name Header, Attribute Value Header, and the Attribute Value Group Header.

- Assign to Me Header
- Assignee
- Status Flag Header
- Workflow Deadline Header
- Workflow Navigation Header
- Workflow Status Header
- Workflow Variable Header

While configuring the headers in display mode properties, a user can choose to set up the table sort order based on a specific header. By editing a particular header's properties, sorting order (ascending or - descending) can be designated using the drop down next to **Table Sorting**.

2. When adding a header, the header properties all have some sort of optional configuration that can be done. Workflow Navigation and Workflow Variable will automatically display their own properties when selected, requiring you to populate required parameters before being able to use the header. Fill in any required information (indicated by an asterisk next to the parameter name), and then click the Save button.

---

**Important:** While ID is the only parameter that indicates it is required within the Workflow Navigation Header Properties, you need to enter text into the Label parameter field. If you do not, then the header will show as 'Not Configured' within the Node List.

---

2. Back on Multi Edit Display Mode Properties, select the **Property Direction** of the table using the dropdown.
3. Enable **Use Immediate Save** if you prefer that any edits made within the table be saved immediately without user intervention. This lessens the risk of losing unsaved data when navigating away from the Task List screen. If disabled, the user must manually click the save button after making any object edits.
4. Click the **Group Options** and **Advanced** headings to display additional parameters that determine the behavior of the data in the table.

If using another display mode, the configuration will be similar to the steps above. Auto-save functionality is only available as an option within Multi Edit Display Mode since this is the only mode available to use when editing data.

Information regarding how to use a Task List is included in the **Moving Tasks through a Workflow in Web UI** topic .

# Workflow State Component

The Workflow State component allows users to see the current status of a selected object in a given workflow or in multiple workflows.

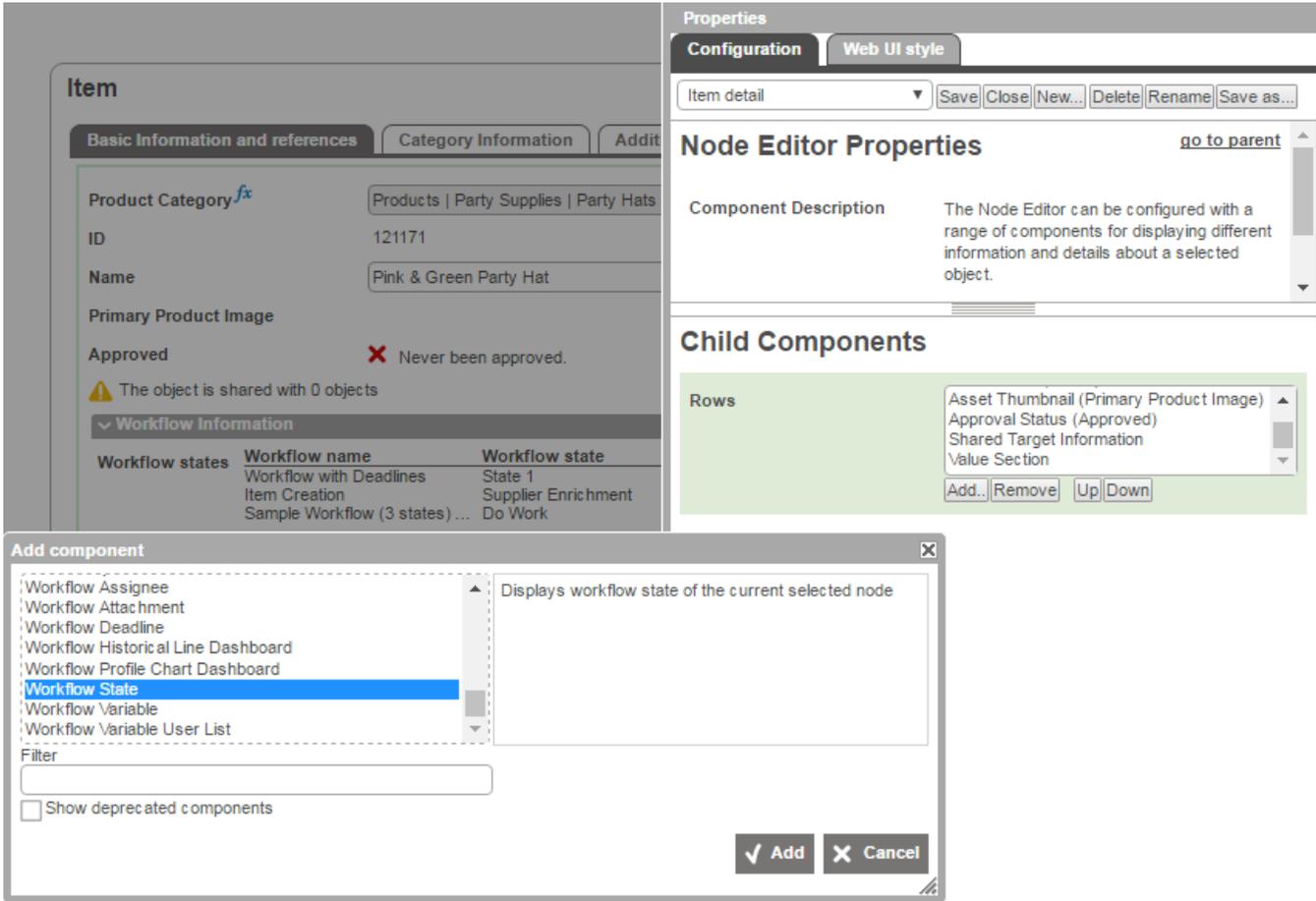
This component can also show if an object is in multiple states in the same workflow, e.g., in a marketing state where an object needs to be enriched with both text and photos.

## Configuring the Workflow State Component

The Workflow State component can be added to a screen with a Node Editor. It can be added to a screen that is configured with other components or within a tab by itself.

1. Enter Web UI designer and navigate to the Node Details screen that you will ultimately configure. In the examples below, the Node Detail screen ID selected is 'Item detail,' and the Node Editors used are child components of configured tab pages.
2. When you are at the Node Editor you want to edit, go to Node Editor Properties > Child Components > Rows, click Add and select **Workflow State** from the 'Add component' dialog.

In this step, the Workflow State is being added as a row by itself. It can also be added to a Value Section, too (as shown in the example screenshots below).



3. Add the **Workflow State** component. Double click on the title to open up **Workflow State Properties**.
4. The Label (Workflow states), State Title Label (Workflow state), Status Flag Title Label (Status), and Workflow Title Label (Workflow name) parameters are optional. Use the default labels (shown in parenthesis in the previous sentence), or replace them by typing in descriptive info in the value fields.
5. No additional configuration is required unless you want to narrow down the workflows displayed. Using the Workflows parameter dropdown, make a workflow selection, and then click Add. Reorganize the order the workflows will display on the screen by selecting a workflow, and then clicking the Up and/or Down buttons.

Here is an of a Workflow State component used on a tab page dedicated to show workflow states.

Basic Information and references				Category Information		Additional Information		Packaging Hierarchy		Tasks		Revisions	
Active in workflow states				Workflow name		Workflow state		Status					
				Workflow with Deadlines		State 1							
				Item Creation		Supplier Enrichment							
				Sample Workflow (3 states) ...		Do Work		Normal					

Note that the tasks displaying in Web UI are active tasks. The Web UI does not display historic task information. Users may access that information through the workbench.

## Mapping Workflow States in Web UI

When creating a screen in Web UI and configuring the components on that screen (the view), you need to tell the system how users access that view. Some screens are accessed through widgets; however, access is usually set up using Web UI mapping.

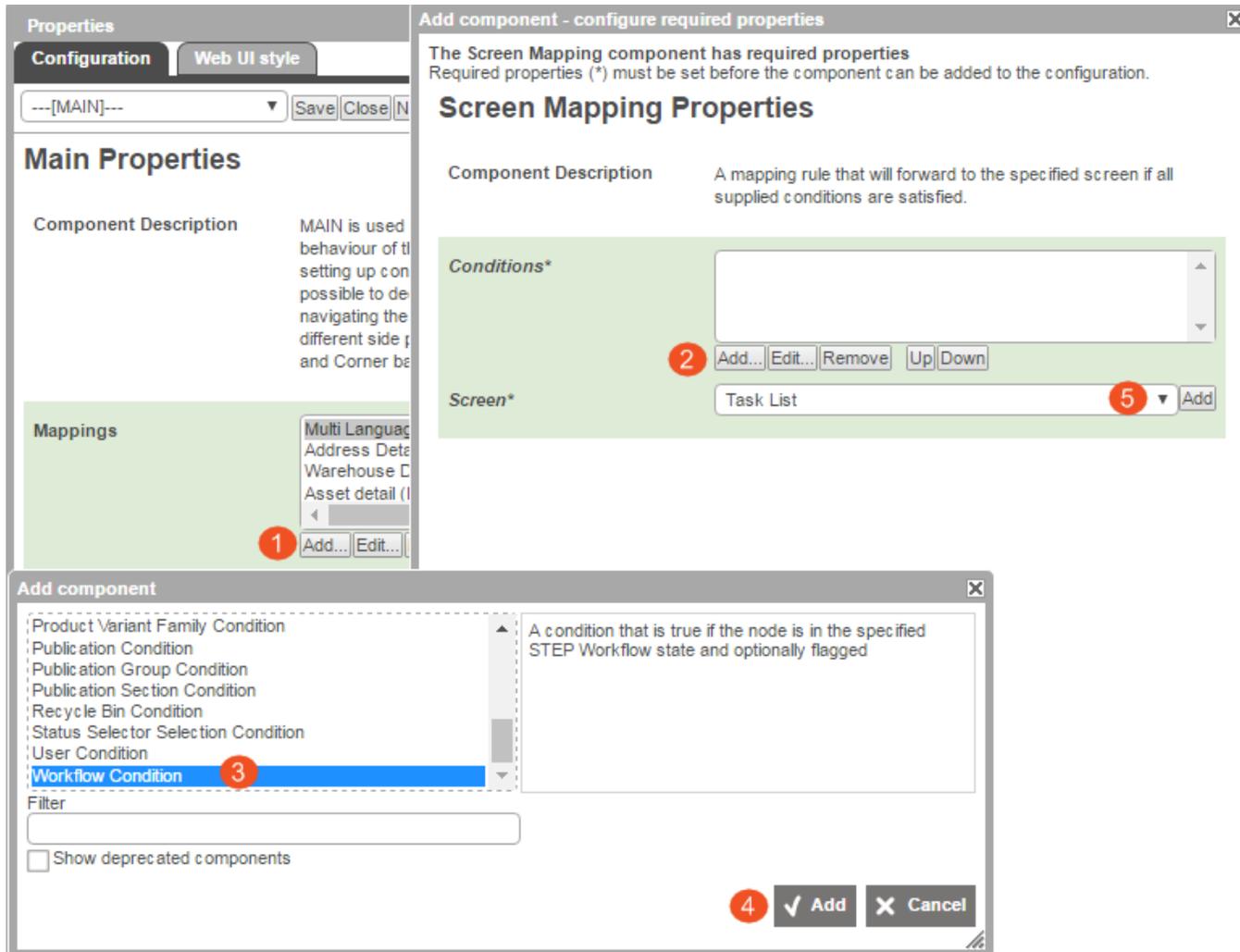
Through mapping configurations, a user can click on a task within a Node List (one configured within a Task List and/or an Advanced Search Screen), and be taken to a specific screen designated for display of objects in the particular workflow and state that the object is currently in.

As a very basic example:

1. You have a workflow with three states.
2. You click on the 'State A' name within the Status Selector Sidebar Widget.
3. A Task List displays.
4. You click on one of the tasks in that Task List, and you are taken to 'Screen A.'
5. Begin again, clicking on 'State B' within the Status Selector.
6. The same Task List displays.
7. You click on one of the tasks and are taken to 'Screen B.'

Continuing on, you could conceivably set up a different destination screen for tasks that you click on for 'State C' when displayed within a Task List (or Advanced Search Screen used as a task list).

The screenshot below gives you a simplified look at the steps to take to add a mapping for a Workflow Condition. To get a thorough understanding of how mapping works and how you might use this feature, see the **Main Properties** topic in the **Using a Web UI** documentation.



Also, there is a step-by-step example that a user can utilize as a starting point to complete their own mappings configuration for when they are using Advanced Search as a task list (instead of a standard Task List screen type). This example can be found in the **Mapping Task List to Workflow State** topic that can be found within the Web UI Advanced Search documentation.

An important point to remember when using Workflow Condition mapping with Advanced Search, regardless of the mapping method, is to make sure the Enable Workflow Selection parameter is enabled within Advanced Screen Properties.

## Working with Tasks in Workflows

This set of topics focuses on the end user, e.g., the user working with tasks in a workflow in the Web UI, rather than the screen / component configuring and/or designing a workflow. They are written under the assumption that the configurations described in the **Getting Started with Workflows** in Web UI section have been completed and all options described are available to the end user.

After reading these topics, a user should be able to access workflow tasks, edit data on objects in a workflow, and submit tasks through the assigned states in a workflow.

Topics covered in this section are:

- Initiating objects into a workflow using Web UI
- Progressing tasks through a workflow in Web UI
- Monitoring what states a task is in

While concepts remain the same across workbench and Web UI, the interfaces differ. For general workflow information that also includes some materials specific to workbench, see the **Workflows** section of the **Workflows / STEP Workflow Designer User Guide** documentation. Furthermore, to follow the examples, the STEP user should have all workflow related privileges.

# Initiating Objects in a Workflow using Web UI

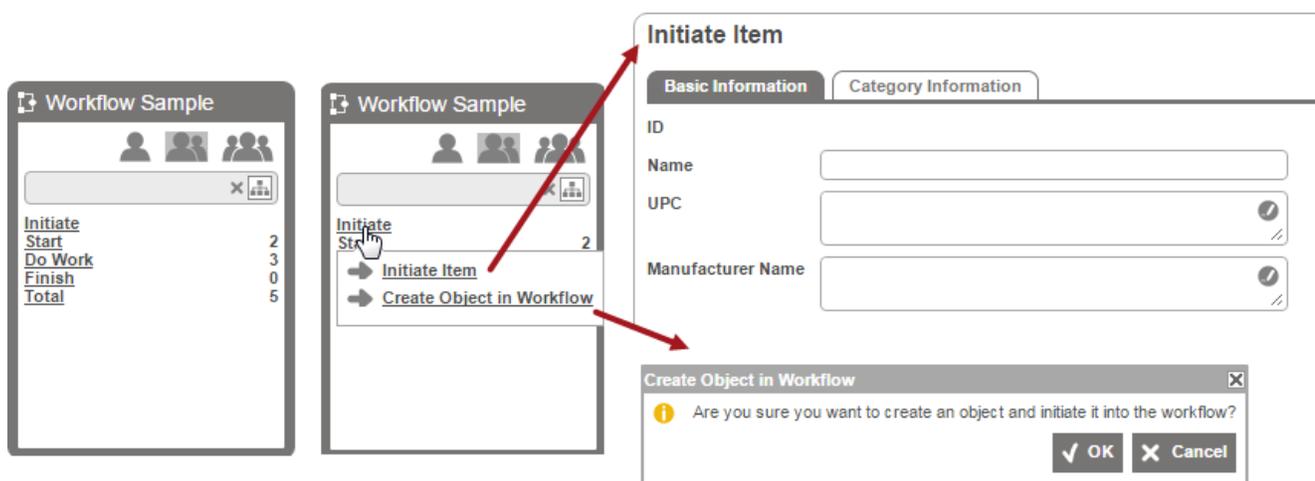
The below process describes two ways to initiate an object into a workflow using Web UI. However, it is important to note that oftentimes workflows will be configured to automatically initiate objects of a certain type or types into the workflow upon creation of the object. In addition, workflows can be initiated by a variety of other actions or processes (both automated and manually initiated), such as business rules, imports, and bulk updates.

**Note:** It is important to be aware that link names, screen names, and button text referred to in the examples / steps in this topic may differ from what is shown on your own system.

## Initiating New Objects

Users can initiate objects into a workflow using a Status Selector Homepage Widget or a Status Selector Sidebar Widget configured to display a link or links to screens used to create and initiate objects into a designated workflow. This functionality uses Initiate Item and/or Create Object in Workflow screen types. Each option is described in greater detail below.

Once created using either method, the objects are automatically initiated into the workflow designated by the Status Selector.



## Create Object in Workflow

When creating new objects that use auto-generated IDs, users can create and initiate objects into a workflow in a single step using a Create Object in Workflow screen type as the Status Selector initiate screen. This allows for a more streamlined object creation process since the user is able to bypass the Initiate Item screen, which means that attribute values do not need to be filled in prior to object creation, and users are automatically taken to an editor screen (determined by the overall Web UI mappings) where they can easily start working with the object data.

1. Click on the initiate link, which is the top link within the Status Selector. This link is shown as 'Initiate' in the example above.
2. Select the 'Create Object in Workflow' link.

3. Choose OK when presented with the 'Create Object in Workflow' dialog.
4. Work with the object to fill in attribute value and/or progress the task through the workflow.

## Initiate Item

Using an **Initiate Item** screen, users fill in attribute values then submit to create and initiate an object. Upon a successful submission, the end user will be navigated to a designated screen configured as part of the Initiate Item Properties setup.

1. Click on the initiate link, which is the top link within the Status Selector. This link is shown as 'Initiate' in the example above.
2. Select the 'Initiate Item' link.
3. On the object details screen, fill in the attribute values and then click Save at the bottom of the screen to create and initiate the object.
4. Your next step will depend on the screen you are taken to after clicking Save. You can continue working with the object to fill in attribute value and/or progress the task through the workflow.

## Initiating Existing Objects

When working with objects in Web UI, a **Start Workflow Action** button can be added to any Node Details screen. This allows users to work with object data and then initiate the object into a workflow with a click of a button. You simply click the 'Start STEP Workflow' button at the bottom of the screen.

The button will only activate when initiation is possible. If deactivated, the object may already exist as a task in the designated workflow.

Once initiated, you will see a confirmation message displayed at the top of the screen, and the 'Start STEP Workflow' button will deactivate for that particular workflow.

**Item**

STEP Workflow "Sample Workflow (3 states) with Variables" has been started

Basic Information and references | Category Information | Additional Information | Packaging Hierarchy | Status

Product Category <sup>fx</sup> Products | Party Supplies | Party Hats | Paper Hats | Pet H.

Name Dog Party Hats Assortment

Approved ✘ Never been approved.

Product Name Dog Party Hats Assortment

Short Item Description It's your dog's birthday - raise the "woof!"

Long Item Description

Brand Name

Brand Owner

Supplier Name Party Dawgs

Supplier Part Number

Provider GLN

Save Reset Start STEP Workflow

To work with the object that you just placed in the workflow, continue on with the topics found in the **Working with Tasks in Workflows** section.

## Moving Tasks through a Workflow in Web UI

Once an object is initiated in a workflow, it is available in one or more states of the workflow. Each instance of an object in a state represents a task to be completed. Each state is assigned to a particular user or group who has the responsibility of completing the tasks in that state. Because of this, tasks are most often accessed via the states themselves, rather than via the objects in the states. Using a Status Selector widget, users can click on a state within a specific workflow to view a Task List. Using a Task List allows, users can view and then work with tasks in the states to which they have privilege to access.

### Processing Tasks in a Workflow

The Status Selector is the primary interface for working with tasks in the Web UI. A Status Selector shows all tasks assigned to the current user (either directly to the user or to a group of which the user is a member). A list of the configured states is displayed, with an object count displaying the number of tasks in the state that the user has access to. Additionally, depending on a user's privileges, a user may see tasks assigned to any user. Click the icons shown at the top right of a Status Selector Homepage / Sidebar Widget to change the view.

In the example below, you see that there are three (3) tasks assigned directly to the user. There are five (5) tasks assigned to a group in which the user is a member (including the current user's tasks), and thirteen (13) tasks total within the states showing the specific workflow.

State	Single User View	Double User View	Triple User View
Initiate	0	0	0
Start	0	2	2
Do Work	3	3	11
Finish	0	0	0
Total	3	5	13

To work with tasks via the Status Selector (Homepage / Sidebar) Widget:

- Navigate to the widget applicable to the workflow and select the appropriate view. There are three options to choose from (as shown in the screenshots above):
  - Single user button:** Only tasks assigned directly to the current user are displayed.
  - Double user button:** Tasks assigned directly to the current user or to a User Group of which he /she is a member are displayed.
  - Triple user button:** All tasks are displayed. This button is only available if the user has 'STEP Workflow Administrator' privileges for the workflow.

Additionally, a user can further refine the task view by using the 'Filter by Collection' option. If a collection has been previously set up, selecting that collection using the Node Picker icon () will filter the task list to display only tasks for objects contained in the collection. For more on creating collections, see the **Collections and Collection Groups** documentation.

- With the appropriate view selected, click the link for the state in which tasks should be accessed or, if shown, click the number of the tasks displayed in the Status Flag columns for a specific state. This will display the tasks according to the view configured by the workflow administrator, allowing users to review and/or edit data as needed. The Task List is typically configured to use to work with tasks. However, the Advanced Search Screen may also be used since both screens use a Node List component when working with the task sets. In the examples in this topic, the **Task List** will be used.

WorkflowSample - Do Work - Sample Workflow (3 states) with Variables - Normal



ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121171	Pink & Green Party Hat	Normal	<input type="checkbox"/>	Brand Managers	8/29/16 8:53:01 AM	121171	Sample Workflow (3 states) with Variables:Do Work	USER8	
121178	Purple & White Party Hat	Normal	<input type="checkbox"/>	Brand Managers	8/29/16 8:53:01 AM	121178	Sample Workflow (3 states) with Variables:Do Work	USER8	
121183	Pink & Blue Giraffe Party Hat	Normal	<input type="checkbox"/>	Brand Managers	8/29/16 8:53:01 AM	121183	Sample Workflow (3 states):Start, Sample Workflow (3 states) with Variables:Do Work	USER8	
121190	Dog Party Hats Assortment	Normal	<input type="checkbox"/>	Brand Managers	8/29/16 8:53:01 AM	121190	Sample Workflow (3 states) with Variables:Do Work	USER8	
121193	Pink & Green Pom-Pom Hat	Normal	<input type="checkbox"/>	Brand Managers	8/29/16 8:53:01 AM	121193	Sample Workflow (3 states) with Variables:Do Work	USER8	

Gray cells are read-only, while white cells can be edited. Cells that have a column header with an asterisk after it (e.g., UPC\*) are considered mandatory and should be populated prior to submission, though the system may or may not prevent transition of the task if they are not populated (based on how the designer has configured the workflow).

- Submitting a task to a subsequent state indicates that work on the task is complete. Unless the user has access to a subsequent task for that object, it will no longer be accessible for them in the workflow. To submit a task, select the task (multi-select is enabled using Ctrl + click), choose the appropriate row or column (depending on the table orientation), and then click Submit. The available options for selection are configurable based on the design of the workflow. In some cases only a single selection will be present and therefore it is not required for the user to select a specific transition.

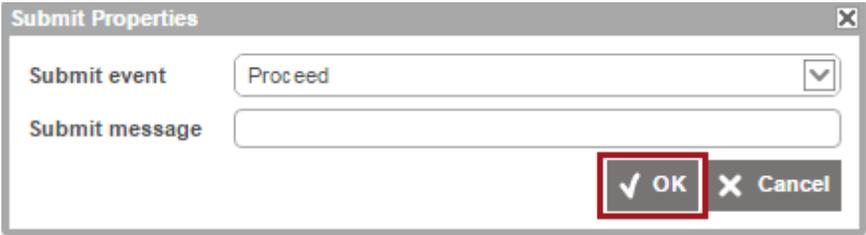
If applicable, any business rules applied to the Submit action will run.

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

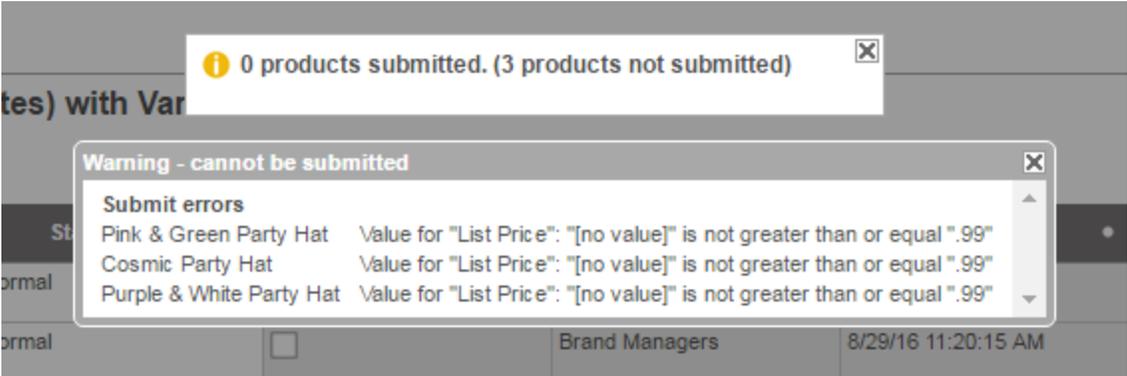


ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121177	Cosmic Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work, Sample Workflow (3 states) with Variables:Start		
121179	Yellow & Pink Party Hat	Normal	<input type="checkbox"/>	Super Users	8/30/16 8:47:29 AM	121179	Sample Workflow (3 states) with Variables:Start		
121184	Christmas Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample Workflow (3 states) with Variables:Start		
121192	Politics Party Hats	Normal	<input type="checkbox"/>	Super Users	8/30/16 8:47:29 AM	121192	Sample Workflow (3 states) with Variables:Start		
121218	Pink & Blue Owl Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with Variables:Start		

- A dialog will appear, allowing the user to input a comment, which will be recorded within the background processes details. Note that if multiple objects were selected, the same comment will be applied to all. From the dialog, click the OK button to complete the task, or click Cancel to return to the Task List.



- Review submission message at the top of the screen. This message will tell you if the workflow submission was successful or not. And, if not, additional details should be provided. Examples follow:



- Refreshing your browser screen will update the Status Selector. However, if the admin configured the Auto Refresh Internal, the Status Selector will update automatically after a set number of seconds.

Tree

- System Setup
- Status Selector

Sample Workflow

Initiate

	Critical	Normal	Error	High
Start	0	3	0	0
Do Work	0	0	0	0
Finish	0	0	0	0
Total	0	3	0	0

**WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal**

ID	Name	Status flag	Assigned to me	Assignee
<a href="#">121177</a>	Cosmic Party Hat	Normal	<input checked="" type="checkbox"/>	User 8
<a href="#">121184</a>	Christmas Party Hat	Normal	<input checked="" type="checkbox"/>	User 8
<a href="#">121218</a>	Pink & Blue Owl Party Hat	Normal	<input checked="" type="checkbox"/>	User 8

**Note:** An alternate way to submit tasks is by clicking on the object ID link (if enabled) within the task list. If an object details (Node Details) screen has been configured to display upon object selection and a Submit button has been configured to display within that screen, then the user can go directly to the object and submit it. The submit button is only active when coming directly from a Task List. It is important to note that this functionality is only available if the admin has allowed for this scenario.

**Tree**

- Products
  - Apparel
  - Footwear
  - Safety
  - Hardware
  - Displays
  - Furniture
  - Automotive
  - Building Products
  - Electrical & Electronics
  - Food and Beverage
  - Kitchen
  - Party Supplies
    - Party Hats
      - Paper Hats
        - Christmas Party Hat
        - Cosmic Party Hat
        - Cosmic Party Hat(2)
        - Pink & Green Party Hat

System Setup  
Status Selector

**Item**

Basic Information and references | Category Information | Additional Information | Packaging Hierarchy | **Tasks** | Revisions

Product Category: Products | Party Supplies | Party Hats | Paper Hats | Paper

ID: 121171

Name: Pink & Green Party Hat

Approved: ✗ Never been approved.

**Workflow Information**

Workflow states	Workflow name	Workflow state	Status
	Workflow with Deadlines	State 1	
	Item Creation	Supplier Enrichment	
	Sample Workflow (3 states) ...	Start	Critical

Save | Reset | **Submit**

### Tasks Tab on an Object

When viewing an object in Workbench via the Tree, a Tasks tab displays all tasks across all workflows for that object, subject to the user's privileges. Only tasks that the user has rights to address are visible.

There is not a pre-configured Tasks tab in Web UI; however, it is easy to set one up or add the task info to an existing screen / tab. Consult with your admin how best to do this.

An example / way to view the workflow states for an object is provided in the preceding screenshot. The information is configured to display within a Node Editor on a Node Details > Tab Page. Another example is provided below in the form of a Tasks tab dedicated to show workflow states.

**Tree**

- Products
  - Apparel
  - Footwear
  - Safety
  - Hardware
  - Displays
  - Party Supplies
    - Party Hats
      - Paper Hats
        - Christmas Party Hat
        - Cosmic Party Hat
        - Pink & Green Party Hat

**Item**

Basic Information and references | Category Information | Additional Information | Packaging Hierarchy | **Tasks** | Revisions

Active in workflow states

Workflow name	Workflow state	Status
Workflow with Deadlines	State 1	
Item Creation	Supplier Enrichment	
Sample Workflow (3 states) ...	Do Work	Normal

Note that the tasks displaying in Web UI are active tasks. The Web UI does not display historic task information. You may access that information through the workbench.

# Claiming / Releasing Workflow Tasks in Web UI

When using the **Assigned to Me** workflow component users with the proper privileges can claim tasks for themselves. The user may be claiming a task that currently belongs to a group that they belong to—or a group they do not belong to.

If using Assigned to Me within a Node List on a Task List or Advanced Search Screen, then clicking the Assigned to Me checkbox claims the task for (assigns the task to) the current user logged in to Web UI. Upon clicking the checkbox, depending on the settings that the admin has set, a user may be auto-navigated to an object details screen so that they can work with the object that they just claimed.

Below is an example of a Task List that originally displayed 'Super Users' as the Assignee for all five tasks. Upon clicking 'Assigned to Me,' the Assignee changed to User 8. User 8 is the user currently logged in to the Web UI.

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121177	Cosmic Party Hat	Normal	<input type="checkbox"/>	Super Users	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work,		
121184	Christmas Party Hat	Normal	<input type="checkbox"/>	Super Users	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample		
121218	Pink & Blue Owl Party Hat	Normal	<input type="checkbox"/>	Super Users	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with		

WorkflowSample - Start - Sample Workflow (3 states) with Variables - Normal

ID	Name	Status flag	Assigned to me	Assignee	Deadline	Workflow navigation	Workflow status	Released by	UPC*
121218	Pink & Blue Owl Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:17 AM	121218	Sample Workflow (3 states) with Variables:Start		
121177	Cosmic Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:29 AM	121177	Sample Workflow (3 states):Do Work, Sample		
121184	Christmas Party Hat	Normal	<input checked="" type="checkbox"/>	User 8	8/30/16 8:47:29 AM	121184	Sample Workflow (3 states):Finish, Sample		

Similarly, to release a task, uncheck the 'Assigned to me' box and the Assignee column changes back to the user group the user is a part of, and another individual in the same user group can now see the task and claim it, if needed.

For full details regarding the benefits of claiming a task and information on how this works in workbench, see the **Claiming / Releasing Tasks in Workflows** section of the **Workflows** documentation.

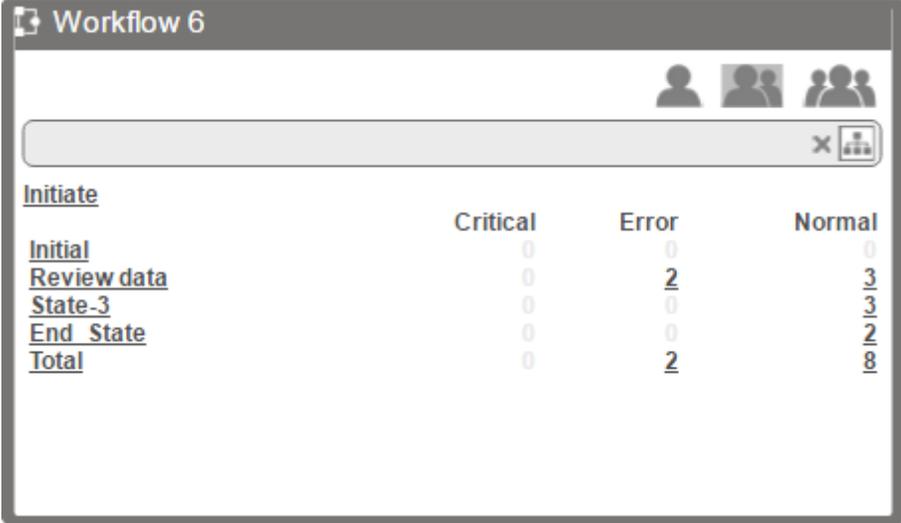
## Advanced Web UI Workflow Topics

This portion of the material covers more advanced workflow configurations, going beyond the basic setups described in the introductory material. Users should be familiar with all material in the **Getting Started with Workflows in Web UI** documentation before attempting to configure and/or utilize more advanced workflow functionality.

Most real-world workflows will utilize the functions described in the advanced topics, but none are required in any particular workflow. The topics generally do not build on one another and completing one configuration typically does not require knowledge of any other, outside of the basic workflow setup and how Web UI screens and components work together. In other words, the advanced workflow documentation is function and topic based, meaning that each topic describes a particular function a user may wish to carry out or a particular topic a user may wish to read about. Therefore, there is no suggested reading order and users should approach the material in the order that seems most relevant for their workflow.

# Status Flags in Web UI

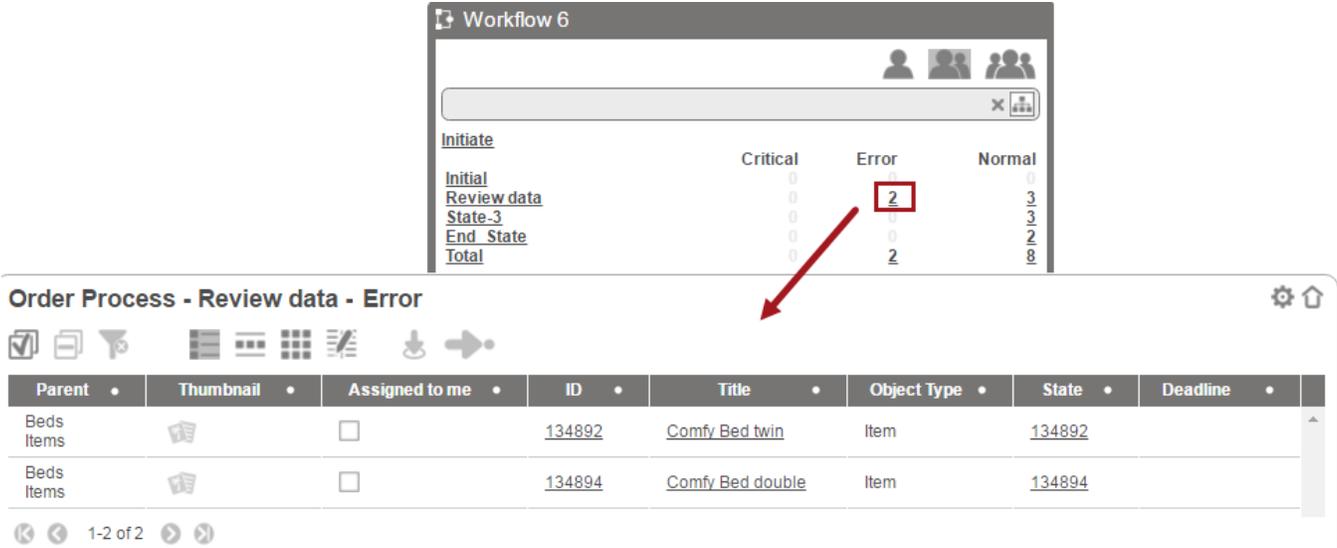
When working with workflows in Web UI, it is important to be able to view status flags should there be any. By configuring the **Status Selector Homepage Widget** and/or the **Status Selector Sidebar Widget**, users can see the task count for selected states in workflows, as well as any status flags defined in the workflow.



Workflow 6

Initiate	Critical	Error	Normal
<a href="#">Initial</a>	0	0	0
<a href="#">Review data</a>	0	2	3
<a href="#">State-3</a>	0	0	3
<a href="#">End State</a>	0	0	2
<b>Total</b>	0	2	8

Additionally, it allows the user to navigate to a **Task List** showing just the tasks having the chosen status flag.



Workflow 6

Initiate	Critical	Error	Normal
<a href="#">Initial</a>	0	0	0
<a href="#">Review data</a>	0	2	3
<a href="#">State-3</a>	0	0	3
<a href="#">End State</a>	0	0	2
<b>Total</b>	0	2	8

Order Process - Review data - Error

Parent	Thumbnail	Assigned to me	ID	Title	Object Type	State	Deadline
Beds Items		<input type="checkbox"/>	134892	<a href="#">Comfy Bed twin</a>	Item	134892	
Beds Items		<input type="checkbox"/>	134894	<a href="#">Comfy Bed double</a>	Item	134894	

1-2 of 2

In a **Task List** in **Table Display Mode** or **Multi Edit Display Mode**, a user can add a **Status Flag Header**, which enables viewing of status flags.

Order Process - Review data -

Parent	Thumbnail	Assigned to me	ID	Title	Object Type	State	Status flag
Beds Items		<input type="checkbox"/>	<a href="#">132499</a>	<a href="#">Rustic Bed Frame</a>	Item	<a href="#">132499</a>	Normal
Beds Items		<input type="checkbox"/>	<a href="#">132500</a>	<a href="#">sheets</a>	Item	<a href="#">132500</a>	Normal
Beds Items		<input type="checkbox"/>	<a href="#">134892</a>	<a href="#">Comfy Bed twin</a>	Item	<a href="#">134892</a>	Error
Beds Items		<input type="checkbox"/>	<a href="#">134894</a>	<a href="#">Comfy Bed double</a>	Item	<a href="#">134894</a>	Error
Beds Sales Items		<input type="checkbox"/>	<a href="#">22163</a>	<a href="#">Bed Frame Set</a>	SalesItem	<a href="#">22163</a>	Normal

1-5 of 5

This header, like other column headers in the **Table Display Mode** or **Multi Edit Display Mode**, can have a filter applied to it to show only the status flags of interest.

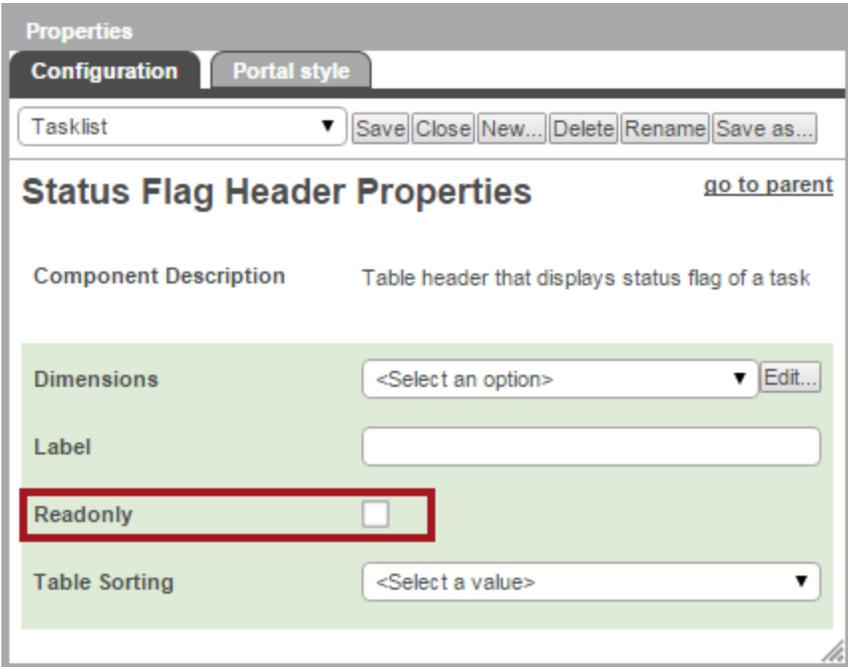
The **Status Flag Header** values are also editable when utilizing the **Multi Edit Display Mode**.

Order Process - Review data -

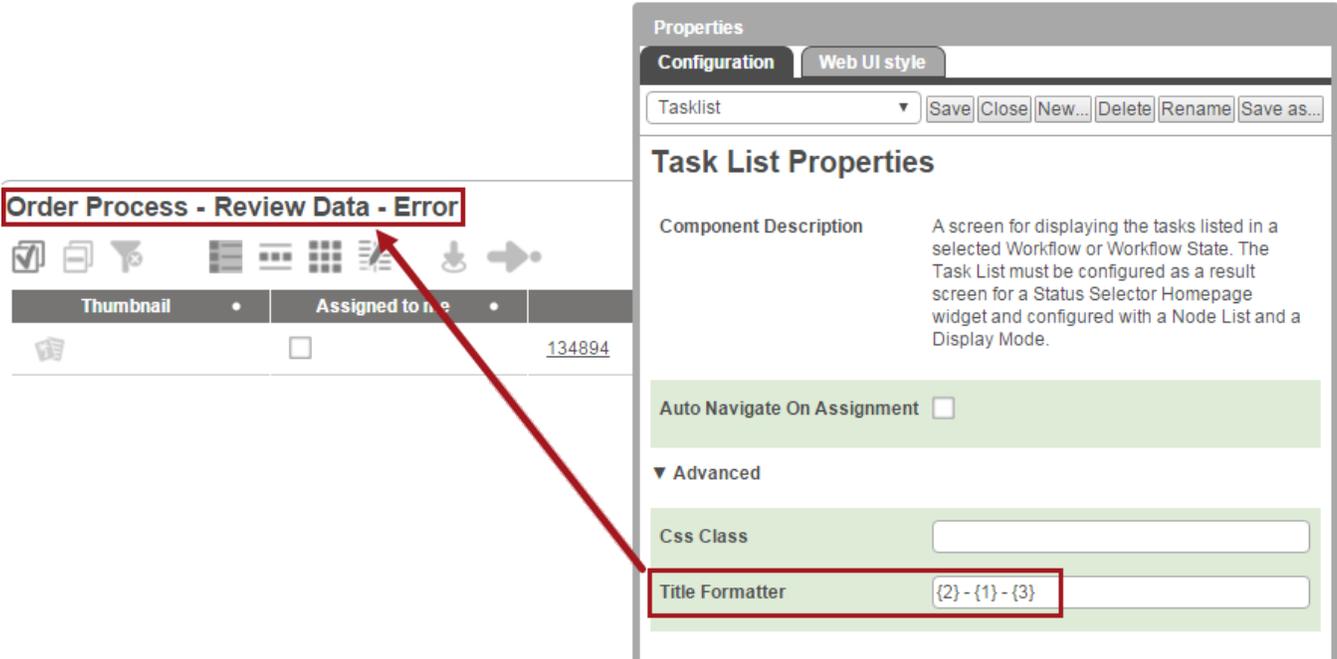
Thumbnail	ID	Object Type	Path	Title	Status flag
	<a href="#">22163</a>	SalesItem	Primary Product Hierarchy/Products/f	<a href="#">Bed Frame Set</a>	Normal (Normal) <input checked="" type="checkbox"/>
	<a href="#">132500</a>	Item	Primary Product Hierarchy/Products/f	<a href="#">sheets</a>	Critical (Critical) Error (Error) Normal (Normal)
	<a href="#">134892</a>	Item	Primary Product Hierarchy/Products/f	<a href="#">Comfy Bed twin</a>	Error
	<a href="#">134894</a>	Item	Primary Product Hierarchy/Products/f	<a href="#">Comfy Bed double</a>	Error
	<a href="#">136089</a>	Item	Primary Product Hierarchy/Products/f	<a href="#">EVN-06</a>	Error

Number of items : 5

Users can double-click on a table cell and use the dropdown to select between the different status flags that have been configured for the Workflow. If editability of status flags is not desired, it can be disabled by checking the 'ReadOnly' option in the component configuration.



Additionally on a **Task List**, under **Advanced**, a user can enter expressions in the **Title Formatter** parameter to return the name of the status flag object associated with the workflow / state selection. This is especially useful when mapping screens based on status flags, as the status flag can also be dynamically reflected in the screen title.



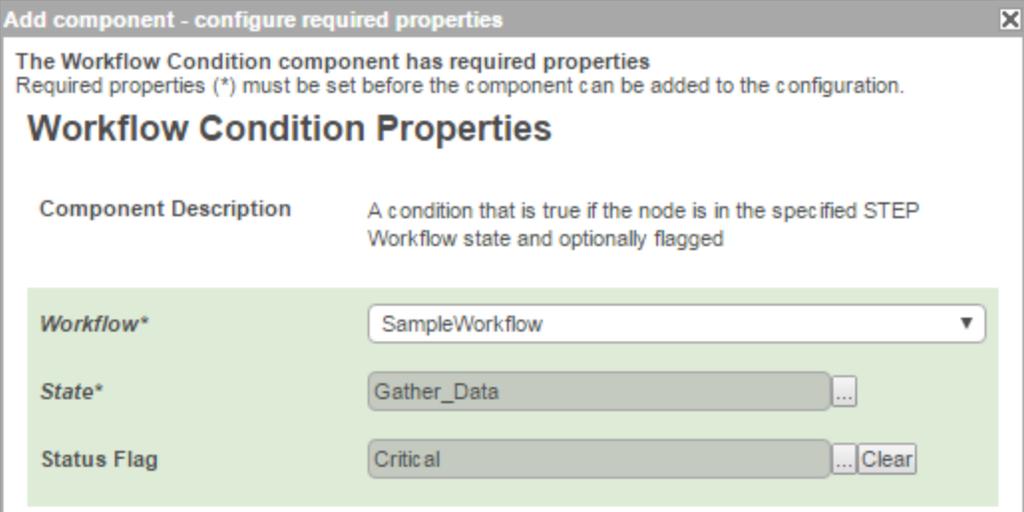
A complete list of expressions available for use is below:

- {0} – Workflow ID
- {1} – State Name
- {2} – Workflow Name
- {3} – Status Flag

For more on how to configure the Status Selector Homepage Widget, see **Status Selector Homepage Widget** in the **Getting Started with Workflows in Web UI** section. For more on a Task Lists screen, see **Task List**.

## Status Flags in Screen Mapping Conditions

Adding status flag values is also available for screen mapping conditions on the **Workflow Condition** and **Status Selector Condition**. This makes it possible for tasks that have a status flag of one type, such as 'Normal', to bring the user to one screen when selected, while tasks that have a status flag of a different type, such as 'Error', to bring the user to a different screen. This helps users to isolate and address high priority tasks in the appropriate way, as Web UI designers have the option to present different data and/or instructions to the end user based on task status.



The screenshot shows a configuration window titled "Add component - configure required properties". It contains a message: "The Workflow Condition component has required properties. Required properties (\*) must be set before the component can be added to the configuration." Below this is the section "Workflow Condition Properties".

<b>Component Description</b>	A condition that is true if the node is in the specified STEP Workflow state and optionally flagged
<b>Workflow*</b>	SampleWorkflow
<b>State*</b>	Gather_Data
<b>Status Flag</b>	Critical

Only status flags that are relevant to the selected workflow are available for selection in the **Status Flag** parameter.

For more on Screen Mapping, see **Mapping Workflow States in Web UI** in the **Getting Started with Workflows in Web UI**.

## Workflow Mandatory Attributes in Web UI

It is often necessary that attributes or whole groups of attributes are mandatory for a state or transition in a STEP Workflow. This means that the object can only pass further in the workflow if the indicated attributes have values. To facilitate this, the relevant mandatory attribute groups and/or attributes can be indicated directly in the STEP Workflow Designer, with mandatory indications being enforced in both the workbench and Web UI.

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

For more information on how to setup these attributes in a workflow, see **Mandatory Attributes in Workflows** in the **STEP Workflows** documentation.

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

## Handling Workflow State and Transition Mandatory Attributes in Web UI

Web UI screens must be configured to include all mandatory attributes. If not, end users will receive errors that they cannot correct. Mandatory attributes set on a Web UI screen are only honored if the 'Submit Action' has 'Enforced Validity' checked within the component properties.

State mandatory attributes are checked prior to transition mandatory attributes. In the case that both are used, end users will first have to correct state mandatory attributes before transition mandatory attribute errors are displayed.

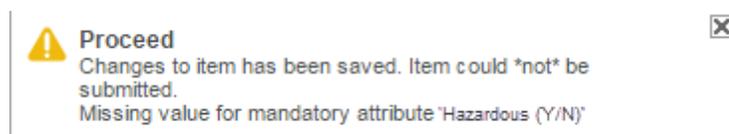
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**Note:** References listed in attribute groups are not supported for use in workflow state and transition mandatory attributes (e.g. selecting an attribute group that includes a reference will not cause that reference to be considered mandatory).

---

Web UI support of mandatory attributes requires the use of Value, ValueGroup, ValueGroupHeader, ValueHeader or ValueLinkHeader portal components

Enforcement of the mandatory attributes occurs in the Web UI, with errors being displayed to the user if an attempt to transition the attribute is made without all mandatory attributes being populated.



Any mandatory attributes are indicated in the Web UI with an asterisk. Those that are mandatory on transitions, rather than states, do not show an asterisk until the user has attempted to submit the object to the next state in the workflow.

Additionally, when using tab pages within a Node Details screen type, if there is any kind of error that impacts the data displayed on a tab (a validation error or missing mandatory value), then a yellow line is displayed directly under the tab name. The underline serves as an easy notification to users that attention is required on a particular tab page or on multiple tab pages. No configuration is needed to turn on this feature.

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**Important:** It is important to consider how mandatory attributes interact with conditional attributes.

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