SYNC
USER GUIDE

StiboSystems

STEP Trailblazer 8.1

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eCatalogs

The STEP component is used to create electronic product catalogs also known as eCatalogs. An electronic product catalog is a data file containing product and price information for a specific product selection. The data file is often in XML format, but delimited text files are also used. Electronic catalogs can also be accompanied by image files depicting the products in the catalog.

eCatalog elements

An eCatalog object consists of three elements:

- A collection of the products go into the eCatalog. A collection can be either dynamic or static.
- A price list which contains the prices that are valid for the eCatalog. A price list consists of product with its terms. A term for a product is a combination of a value and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date, and End Date.
- An eCatalog configuration which specifies the output format, the delivery method, and the mapping between internal product attributes and the attributes of the export format.

eCatalogs are organized in a hierarchy with inheritable prices. An eCatalog can have a specific product selection but only standard prices. Product selection lists are inheritable, too.

Create an eCatalog

1. In the **Tree**, click **eCatalogs**.
2. Right-click, and then click **New eCatalog**.

   The Create eCatalog dialog box appears.
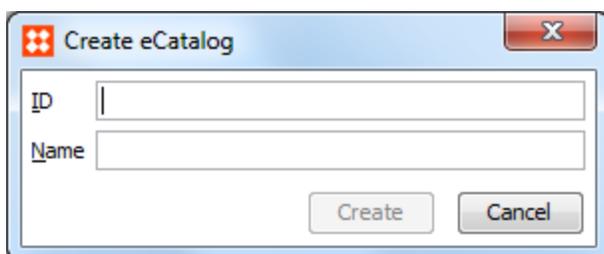
3. Enter an **ID** and **Name** for the eCatalog, and then click **Create**.

You can now add the following elements to your eCatalog.

- A price list that contains the prices that are valid for the eCatalog.
- A product collection that contains a list of all the products that go into the eCatalog.
- An eCatalog configuration that specifies the output format, the delivery method, and the mapping between internal product attributes and the attributes of the export format.
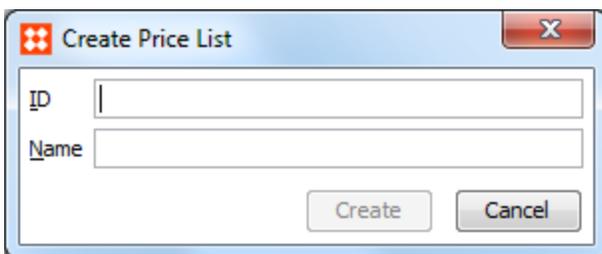
Creating a Price List

A price list consists of **terms**. A term for a product is a combination of a value (price) and a set of conditions such as Minimum Quantity, Maximum Quantity, Start Date, and End Date.

Create a Price List for the eCatalog

The first step when setting up your eCatalog is to create a price list that holds the prices of the eCatalog:

1. In the **Tree**, select the eCatalog that you want to create a price list for.

2. Right-click, and then click **New Price List**.

   The **Create Price List** dialog box appears.

3. Enter an **ID** and a **Name** for the price list, and then click **Create**.

4. On the **Price List** tab, the following optional settings are available.

   - **Immutable:** locks the price list and prevents it from being updated.
   - **Import Configuration:** Specifies the import configuration to be used for the price list.
   - **Currency:** Specifies which currency to use.
   - **Expiry date:** Specifies an expiry date and time for the price list. Click the ellipsis button **(…)** to open the **Date Picker** and select a date.

   Important: The **Expiry Date** is for administrative purposes only. The price list does not expire automatically.

   - **Default start-date:** Specifies a date from which the price list becomes effective.
   - **Default end-date:** Specifies a date until which the price list is effective.

Import Data

Note: To reload prices using an import template, use the Import Data item from the menu activated by right-clicking the price list. This menu item will only be available if an import configuration has been saved.
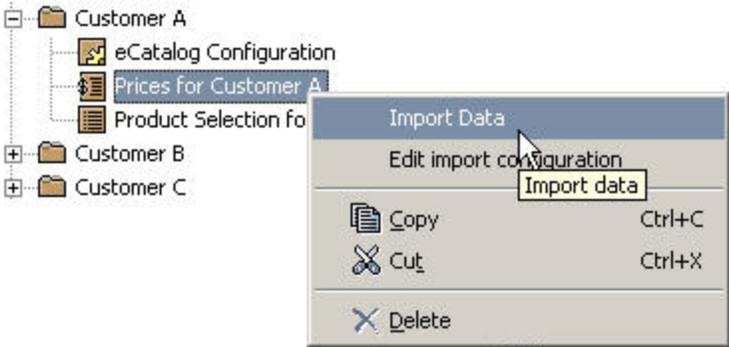
An **Import commercial data** dialog box appears.
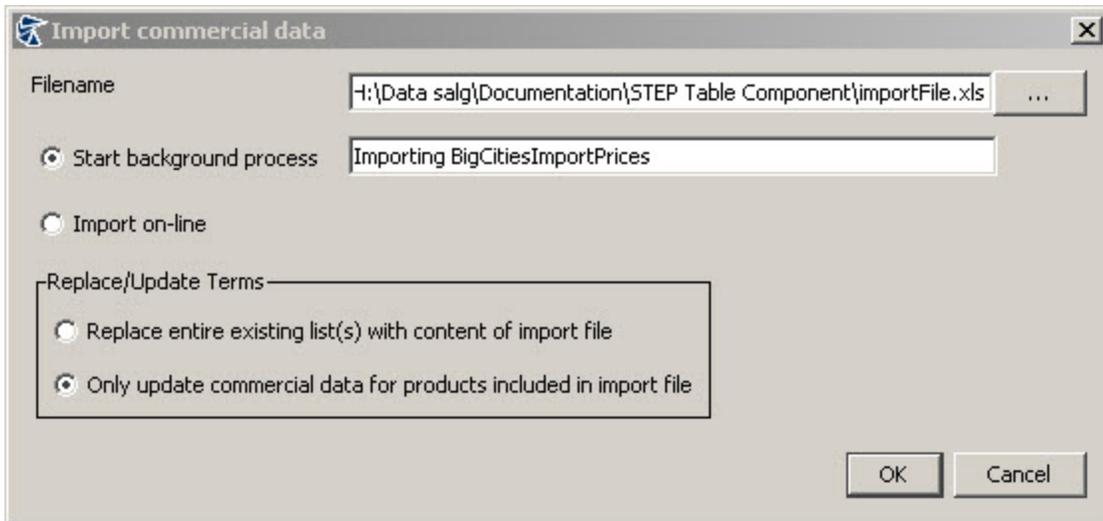
1. In the **Filename** field, select the file to import.

2. Click either **Start background process** or **Import On-line**.

3. Under **Replace/Update Terms** select **Replace entire existing list(s) with content of entire file** if you want the entire existing content of the commercial list(s) included in the import configuration to be deleted and replaced by the content of the new file. Select **Only update commercial data for products included in import file** if you want to keep the existing content of the price list(s) included in the import configuration, but just replace the terms of the product IDs included in the new file, or add products IDs that were not yet included in the existing import.

   Note: The choice you made at step 7 of the Import Data Wizard will be set as default here, but you can override this option by selecting the other option.

Viewing Commercial Data

To view Commercial Data it is necessary to create and import a Commercial (Price) List first.

You can view Commercial Data from:

- Price (commercial) list
- Product

How to View Commercial Data from Price list

1. In the **Tree**, expand the **eCatalogs** hierarchy.

2. Click the relevant **Price** or **Commercial** list.

   The Price List editor appears.

3. Click the Flipper button next to **Content of** [Commercial List Name] list.

How to View Commercial Data from a product

1. In the **Tree**, expand the **Product** hierarchy.

2. Click the relevant **Product** and click the Commercial tab.

3. Click the Flipper button next to **Terms**.

Editing Commercial Data

It is possible to edit commercial data from:

- Commercial list
- Product

Important: In order to edit commercial data, the check box **Immutable** should be unchecked.

How to edit Commercial Data from Price (commercial) list

Editing terms

1. In the **Tree**, expand the **eCatalogs** hierarchy.

2. Click the relevant **Price** or **Commercial** list.

   The **Price List** editor appears.

3. Click the Flipper button next to **Contents of** [Commercial List Name] list.

   A table-based view of the products and their terms is shown.

4. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Edit Term**.

   An **Edit terms** dialog box appears.

5. You can edit the relevant fields directly within this dialog box.

Adding terms

Follow step 1-5 under 'Editing Terms', and then right-click the menu icon (arrow) next to one of the terms in the dialog box, and select Add Term. Alternatively, scroll to the bottom of the Edit terms dialog box, click **Add Term**.

Removing terms

Follow step 1-5 under 'Editing Terms', and then right-click the menu icon (arrow) next to one of the terms in the dialog box, and select **Remove Term**.

Adding Products

Instead of importing products into a commercial list, you can add products manually for which you then can edit the terms.

1. In the **Tree**, expand the **Publication** hierarchy.

2. Click the relevant **Publication** and expand the hierarchy.

3. Expand **Commercial Data.**

4. Click the relevant Commercial List. The **Price List** editor appears.

5. Click the Flipper button next to **Contents of** [Commercial List Name] list.

   A table-based view of the products and their terms is shown.

6. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Add Product**. Alternatively, scroll to the bottom of the table-based view, click **Add Product**.

   An Add Product to Terms List dialog box appears.
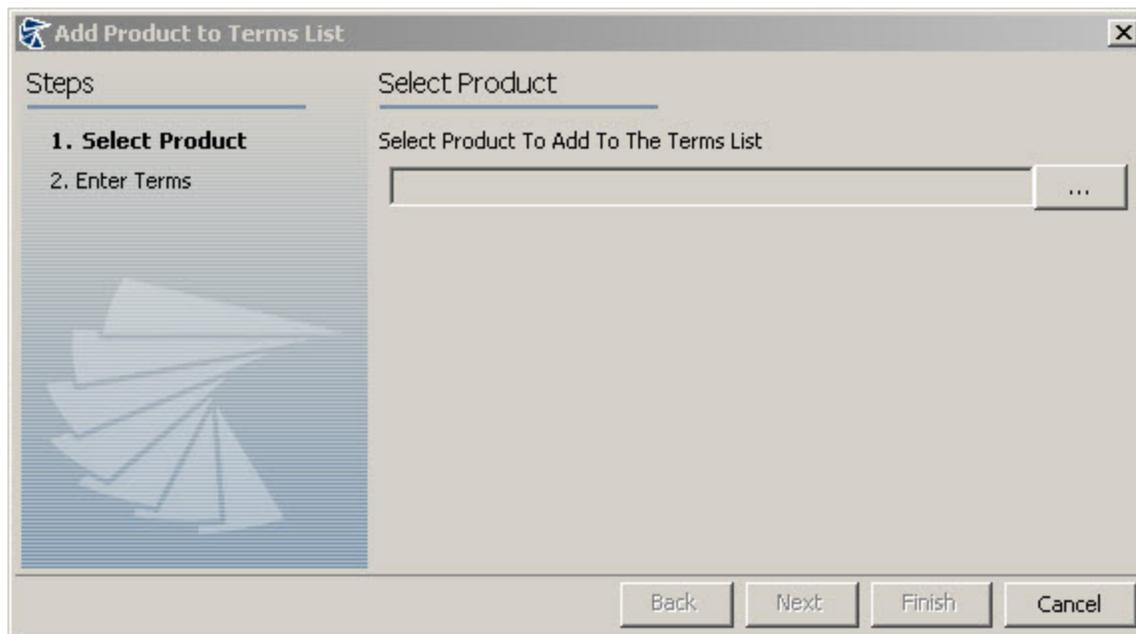
7. Click the ellipsis button **[...]**, then either browse or search for a Product, and then click **Next**.

8. Click **Add Term** and fill in the relevant fields.

9. Click **Finish**.

Removing Products

1. Follow steps 1-5 under 'Editing Terms', and then right-click the menu icon (arrow) next to one of the terms in the table, and then click Remove Product.

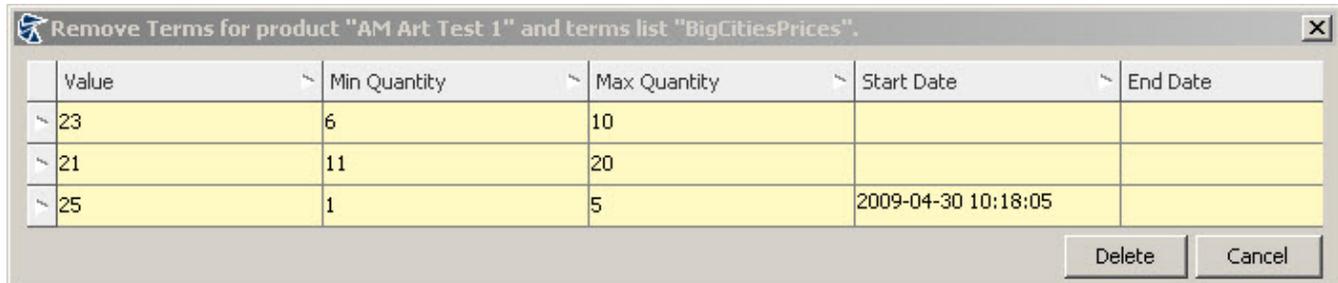2. A Remove Terms dialog box appears, showing all the terms that will be affected.

3. Click **delete** or **cancel**.

How to edit Commercial Data from Product

1. In the **Tree**, expand either the **Classification** or the **Product** hierarchy and find the Object you want to use.

2. Click the **Commercial** tab.

3. Click the flipper button next to **Terms**.

   A table-based view of the terms for this product is shown.

Editing terms

1. Follow step 1-3 under 'How to Edit Commercial Data from Product', and then right-click the menu icon (arrow) next to one of the terms in the table, and then click **Edit Term**.

   An **Edit Terms for product** dialog box appears.

2. You can edit the relevant fields directly within this dialog box.

Adding terms

1. Follow step 1-3 under 'How to Edit Commercial Data from Product', and then right-click the menu icon (arrow) next to one of the terms in the table, and then click **Edit Term**.

   An Edit Terms for product dialog box appears.

2. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Add Term**. Alternatively, scroll to the bottom of the table-based view, click **Add Term**.

Alternatively

1. Follow step 1-3 under 'How to Edit Commercial Data from Product', and then scroll to the bottom of the table-based view, click **Add Term**.

   An **Add Term to Product** dialog box appears.

2. Click the ellipsis button **[...]**, then either search or browse for the relevant Commercial list, and then click **Next**.

3. Scroll to the bottom of the selected terms list and click **Add Term**, and then fill in the relevant fields.

4. Click **Finish**.

Removing terms

If you want to remove all the terms for a product:

1. Follow step 1-3 under 'How to Edit Commercial Data from Product', and then right-click the menu icon (arrow) next to one of the terms in the table, and then click **Remove Term**.
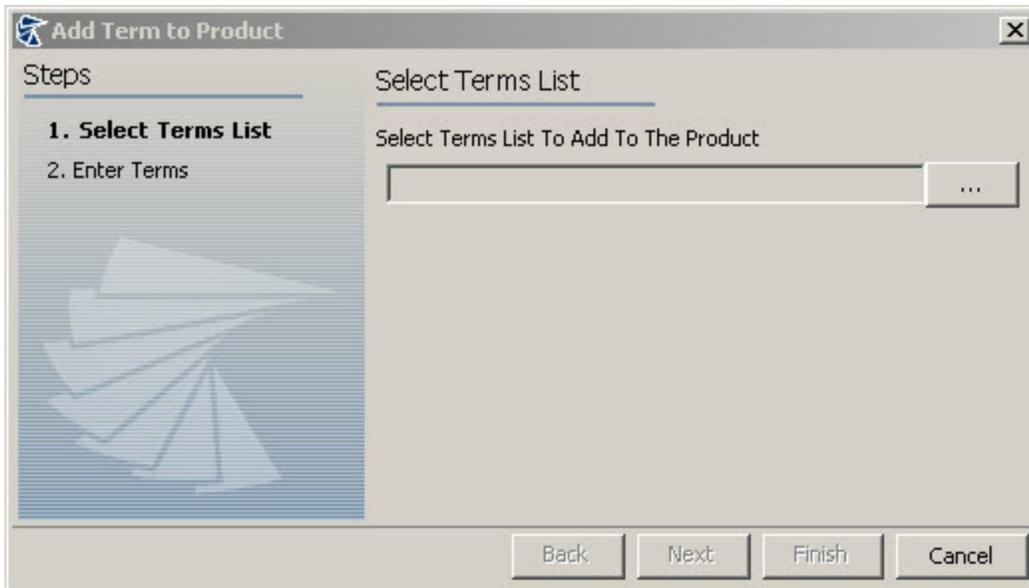
   A **Remove Terms for product** dialog box appears, showing all the affected terms.

2. Click **Delete** or **Cancel**.

If you want to remove individual terms for a product:

1. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Edit Term**.

   An **Edit Terms for product** dialog box appears.

2. Right-click the menu icon (arrow) next to one of the terms in the table, and then click **Remove Term**.

3. Click **OK**.

Searching within Commercial Data

It is possible to search within Commercial data from:

- Commercial list

1. In the **Tree**, expand the eCatalogs hierarchy.

2. Click the relevant Price or Commercial list.

The Price List editor appears.

3. Click the Flipper button next to Contents of [Commercial List Name] list.

    A table-based view of the products and their terms is shown.

4. At the top of this view, type in a product name or ID, or part of the product name or ID with an asterisk (*), and then click Search.

    The search result is shown. At the top the Product Count is displayed, showing the number of terms and the number of products found.

Note: In order to revert to the original content, leave the search field blank, and then click Search. Using an asterisk (*) only will slow the system down.

Copying Commercial Data

1. In the **Tree**, expand the **eCatalogs** hierarchy.
2. Right-click the **Price List** to copy, and then select **Copy** from the context menu.
3. Select the eCatalog Folder under which you will paste the Price List, and then right-click and select **Paste** from the context menu.

    A **Duplicate** dialog box pops up.

4. Type an ID and Name in the **ID** and the **Name** fields.

    Check the **Duplicate Products** check box to copy the actual content of the Commercial list (i.e. products, see "Creating a Price List" on page 4Importing Prices).

5. Click **OK**.

Note: You can copy from a Commercial Data folder into another eCatalog folder or into a Publication if you have STEP Flatplanner installed. For more information see the STEP Flatplanner User Guide.

Importing Prices

When you have created a price list, you can import prices by using the **Import Manager.**

1. In the **Tree**, expand the relevant eCatalog.

2. Select and right-click the price list that you want to import prices to, and then click **Edit import configuration**. The **Import Manager** appears.

   The wizard consists of 7 steps. All steps are described in detail in the **Creating a Data Import** section of the **Data Exchange** documentation. The following only contains detailed descriptions of the steps that are of particular importance to commercial data. The wizard opens at step 2.

3. In step 2, **Select Data Source**, select the file that contains the prices that you want to import.

4. In step 3, **Select Format**, select the type of file you are importing and specify some basic file parameters. The import file is typically an Excel file, but other formats are available.

   For more information about the available import formats and their settings, see **Import Manager Select Format** in the Data Exchange documentation.

5. In step 4, **Map Data**, click a source column, and then click **Map**. The **Map <Column> to** dialog appears. Here you can map each piece of price related information to the various price attributes in the price list object of the eCatalog in question.

   Note: If you are importing an Excel file, you must identify the column that contains the product ID.

6. When you map **Commercial Data**, you have the following options:

   - From the **Data Set** list, select the commercial list that you want to apply the mapping to.

   - From the **Group** list, select the preferred quantity break. Quantity breaks are used when you have different price tiers for the same product based on the quantity a customer buys and/or based on different dates. You then use the Group field to map the various price groups. Quantity breaks are numbered from 1 and up.

   - Select **Value** if you want to map the column to price values.

   - Select **Min. Quantity** if you want to map the column to minimum quantity in the selected group or price break.

   - Select **Max. Quantity** if you want to map the column to maximum quantity in the selected group or price break.

   - Select **Start Date** if you want to map the column to the start date when the price becomes valid.

   - Select **End Date** if you want to map the column to the end data of the selected group or price break.

   - Select **Mandatory** to skip products without a value in the selected column.

7. Click **OK**. Go through step 4 as many times as needed to map all required columns, and then click **Next**.

   For more information about mapping data, see Mapping Data Manually in the Import Manager documentation.

8. In Step 5, **Identify Objects**, you can view the matches found by the system. Click **Next**. The **Match** button is only enabled if you have not mapped a column to a product ID in Step 4 of the wizard.

9. In Step 6, **Identify Destination**, you can specify where to place products that do currently not exist in the system.

   For more information, see **Import Manager Identify Destination** in the **Data Exchange** documentation.

10. In Step 7, select **Business Rules**, select any conditions or actions that you want to apply to the imported data.

11. In Step 8, **Advanced Settings**, the following settings are relevant for eCatalog imports:

    - Optionally, use the **Context** field if you have more language versions.

    In the **Replace/Update Options** area, under **Replace/Update Terms** you have the following options.

    - Select **Replace entire existing list(s) with content of entire file** if you want the entire existing content of the commercial list(s) included in the import configuration to be deleted and replaced by the content of the new file.

    - Select **Only update commercial data for products included in import file** if you want to keep the existing content of the commercial list(s) included in the import configuration, but just replace the commercial data of the product IDs included in the new file, or add products IDs that were not yet included in the existing import.

12. When you click Finish, the **Save Import Configuration** dialog is displayed, allowing you to save the import configuration with its current mappings etc. and reuse it as an import template. This may be useful if you from time to time need to import a price source file where for instance only prices have been changed.

    Optionally, select **Save Options** if you want to save the import configuration as a template for later use. You can also enter a name of the configuration in the field below New configuration, and mark if you want the import done now or later.
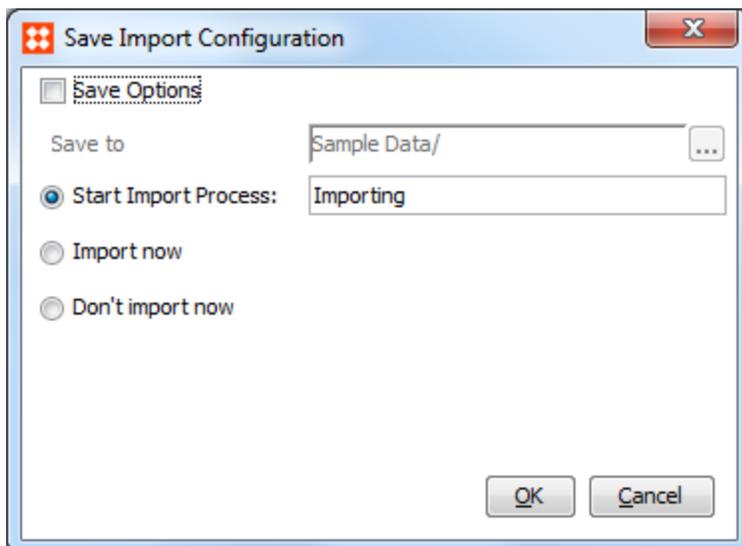
13. Click **OK**. The import process starts. If you want to view the progress of the process, click **Go to Process**.

Note: When price list information is imported only the ISO date and time format is accepted. If the list being imported uses another format, it will automatically be converted into the ISO date and time format during the import. Furthermore, the date fields in Excel must be formatted as text fields before they can be imported.

	A	B	C	D	E	F
	Product	Price	Min Quant	Max Quan	Start Date	End Date
2	EXE-1002-1004	119	1	5	2008-07-15 12:15:40	2008-08-15 12:15:40
3	EXE-1002-1004	112	6	10	2008-08-15 12:15:40	2008-09-15 12:15:40
4						

Price and Date pricelist [Kompatibilitetstilstand]

The prices for a specific product are also available on the **Commercial** tab of the product editor.

Selecting Products for eCatalogs

You use collections to select the products that you want to be part of an eCatalog. You can create a dynamic collection based on a search or a static collection based on a text file.

Create a Dynamic Collection for an eCatalog

1. In the **Tree**, create the eCatalog that you want to add the collection to.

    For more information, see Create an eCatalog on page 3.

2. On the **Search** tab, search to locate the products that you want to be part of the eCatalog.

    For more information, see Searching in the Getting Started documentation.

3. In the **Operations on Entire Results** area, click the **Collections** icon, and then browse or search for the eCatalog that you want to add the collection to.

4. Enter an **ID** and a **Name** for the collection, and then click **Search in Background** to add the collection to the catalog.

Important: Though still available in some versions, the Product Selection List feature has been deprecated. We strongly recommend that you use collections for product selections.

Create a Product Selection List

1. In the **Tree**, select the eCatalog that you want to create a product selection list for.

2. Right-click, and then click **New Product Selection List**.

    You can now populate the list with data from one of the following sources:

    -   Search results
    -   External text files containing lists of products or classifications list. External files must contain one product or classification ID per line.

3. Click the **Selection List** tab.

On the **Selection List** tab, you can select files with products or classifications that you want to include or exclude in the current product selection list.

Click the **Value** column in the relevant **List** field, and then click **[...]**.
An **Open** dialog box appears in which you find the relevant file.

You can also enter a prefix and/or suffix (postfix) for the imported list, if a prefix or suffix should be considered together with the IDs in the file. You may for instance want to make the IDs match a naming convention for STEP Ids in your system. Example: All STEP IDs begin with "SKU_". To make all imported IDs follow that naming convention, type SKU_ in the **Prefix** value field.

4. Click the relevant product selection list under the eCatalog, right-click, and then click **Define Parameters**.

The **Define Parameters** dialog box appears.
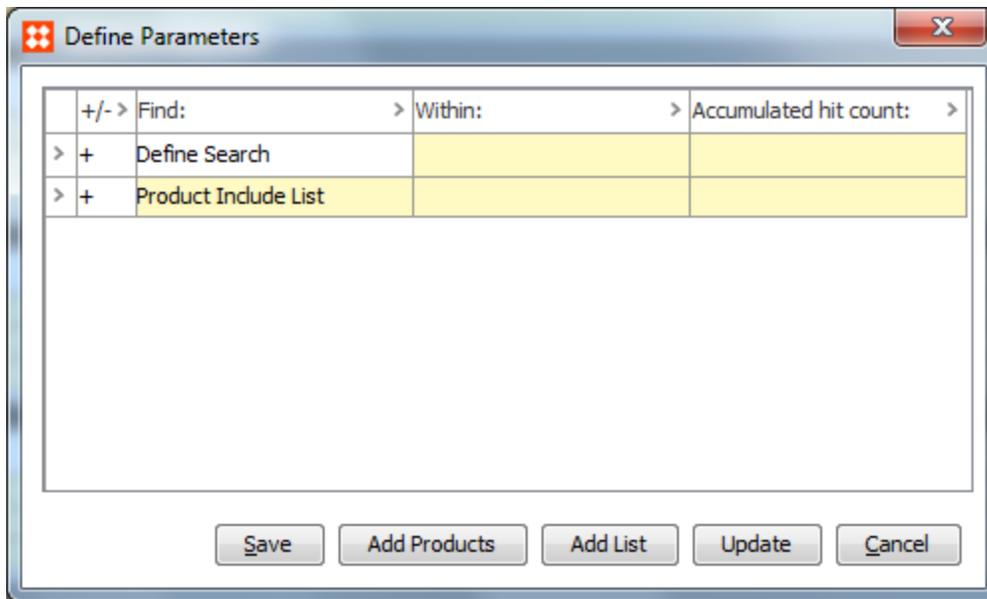
5. Click **Add Products**, click in the **Define Search** field, and then click the **[...]**button.

   A **Search** dialog box appears where you can search for attributes.

6. On the **Attribute** tab, define the search criteria for the attributes.

   - Type an attribute name, click a relational operator, and then type a value.
   - From the **In** list, click an object type (e.g. Project, Asset etc.)
   - In the **Below** field, click **[...],** search for a folder in the appearing dialog box, and then click **Select**.
   - Click **OK** in the Search dialog box.

6. Repeat step 4 to 5 to add the relevant products to the product selection list.

7. Optionally, click **Add List** to select files with products or classifications to be included or excluded in the current product selection list.

   The **Select List Type** dialog box appears.

8. Select the relevant list type, and then click **Select**.

    You have the following options:

   - **Product Include:** A file with Product IDs to be included in the Product Selection List
   - **Product Exclude:** A file with Product IDs to be excluded in the Product Selection List.
   - **Classification Include:** A file with Classification IDs to be included in the Classification Selection List.
   - **Classification Exclude:**A file with Classification IDs to be excluded in the Classification Selection List.

   Note: The files must be imported to the system from the **Selection List** tab (see step 2).

9. Click **Update** in the **Define Parameters** dialog.

    The Accumulated hit count column now displays the amount of products in the Product Assortment.

    The accumulated hit count is made from the structure in which the parameter rows appear. It is therefore important to consider the order in which the rows appear.

10. Click **Save** to save the selection criterion.

   **Note:** When clicking **Cancel**, you leave the **Define Parameters** dialog box without making any changes.

11. In the **Selection List**tab you can now view the resulting list in the Items area.

12. Optionally, double-click in the Expiry Date field, and then specify a date where you want the product selection list to expire. The **Expiry Date** field is for administrative purposes only. The product selection list does not expire automatically.

13. To rebuild a saved product selection list, right-click the product selection list question in [Tree] and select **Update Items**.

Copying a Product Selection List

1. In the **Tree**, unfold the **eCatalogs** hierarchy.
2. Right-click the **Product Selection List** to copy, then select **Copy** from the context menu.
3. Select the eCatalog Folder under which you will paste the Product Selection List, then right-click and select **Paste** from the context menu.

    The **Duplicate** dialog box appears.
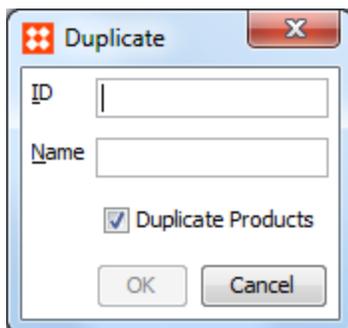
4. Enter an **ID** and a **Name**.
5. Select the **Duplicate Products** check box, if you want to copy the actual content of the Commercial list, and then click **OK**.

Classifications

Classifications make out a hierarchical system for grouping materials, products, and services according to a logical structure.

You can use classification hierarchies in combination with eCatalogs, which is useful if the recipient of the electronic catalog uses the same structure. It makes it easier to handle the data.

Classification Hierarchies

A product has one link into the product hierarchy, but it can have several links into the classification hierarchy. Also, a product hierarchy can contain several products that are all linked to the same classification.

You can organize a classification hierarchy according to a number of principles including market segments, supplier, or industry standards such as UNSPSC (United Nations Standard Products and Services Code) or eCl@ss. This enables you to link a specific product from the product hierarchy into for example, the eCl@ss hierarchy.

Object Types in Classification Hierarchies

A Classification hierarchy is typically defined with a specific structure in mind. Each classification node is assigned a pre-defined object type, which specifies the characteristic for that type of node. The available object types depend on the actual configuration of the STEP database.

Note: The various classification hierarchies have one root node each. The root node of the classification hierarchies identifies the specific hierarchy.

Creating an eCatalog Configuration

The fourth step when setting up your eCatalog is to create an eCatalog configuration that specifies the data to be included in the eCatalog as well as the data format of the eCatalog.

eCatalog Configuration

- In the **Tree**, select the relevant eCatalog, right-click, and then select **New eCatalog Configuration**.

Edit and Configure an eCatalog configuration

1. In the **Tree**, select the relevant eCatalog Configuration, right-click, and then select **Edit**.
2. The **Configure eCatalog** wizard appears. The Configure eCatalog wizard is based on the Export Manager with added functionality allowing you to map the prices from the price list information of the current eCatalog into the selected output format. You can choose among the following eCatalog formats that are supported via export plug-ins:

   - **BMEcat 1.2**
     An XML file format created by The German Bundesverband Materialwirtschaft, Einkauf und Logistik e. V. (BME).
     More information about the format is available on the web.

   - **Excel**

   - **Ariba CIF 3.0**
     A flat text file format created by Ariba Inc.
     More information about the format is available on the web.

   - **Ariba cXML 1.2**
     An XML file format created by Ariba Inc.
     More information about the format is available on the web.

- **CommerceOne xCBL 4.0**
  An XML file format created by CommerceOne.
  More information about the format is available on the web.

Configure eCatalog Configuration with Excel as Export Format

The **Configure eCatalog** wizard opens with step 3, **Select Format**.

1. Select the relevant format, and then click Next.

2. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 4, **Map data**.

To map data, click on the wanted piece of data, for instance <ID>, and then click the arrow button in the right part of the window. Then the <ID> will be added to the list of data to be exported shown to the right.

Continue mapping all the data that you want to export. As a minimum, map ID, name and price.

When mapping from a price list you will be asked to enter the quantity break. A pricelist can contain multiple prices for the same product in different quantities and/or date spans. The quantity breaks are numbered from 1 and up.

Example of quantity breaks:

Quantity	Price	Quantity break
<5	9.99	1
6-10	9.50	2
11-50	8.99	3
>50	8.05	4

When mapping a price attribute you have the same transformations available as you would have for a product attribute, but the available aspects differ.

To open the **Transformations** dialog, click the button to the right of the Price value in the list of mapped values.

3. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 5, **Select Delivery Method**.

4. Select a delivery method, for instance File.

5. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 6, **Advanced**.
On the **Advanced** page you can specify the **Workspace**.

In case prices to be exported have been provided with start and end date, you can use the effective date to ensure that they will only be included in the export if the effective date lies within the specified period. If no date span has been selected for prices, effective date will have no effect. Further, you can select between using the current date when the export is initiated or enter a specific date.
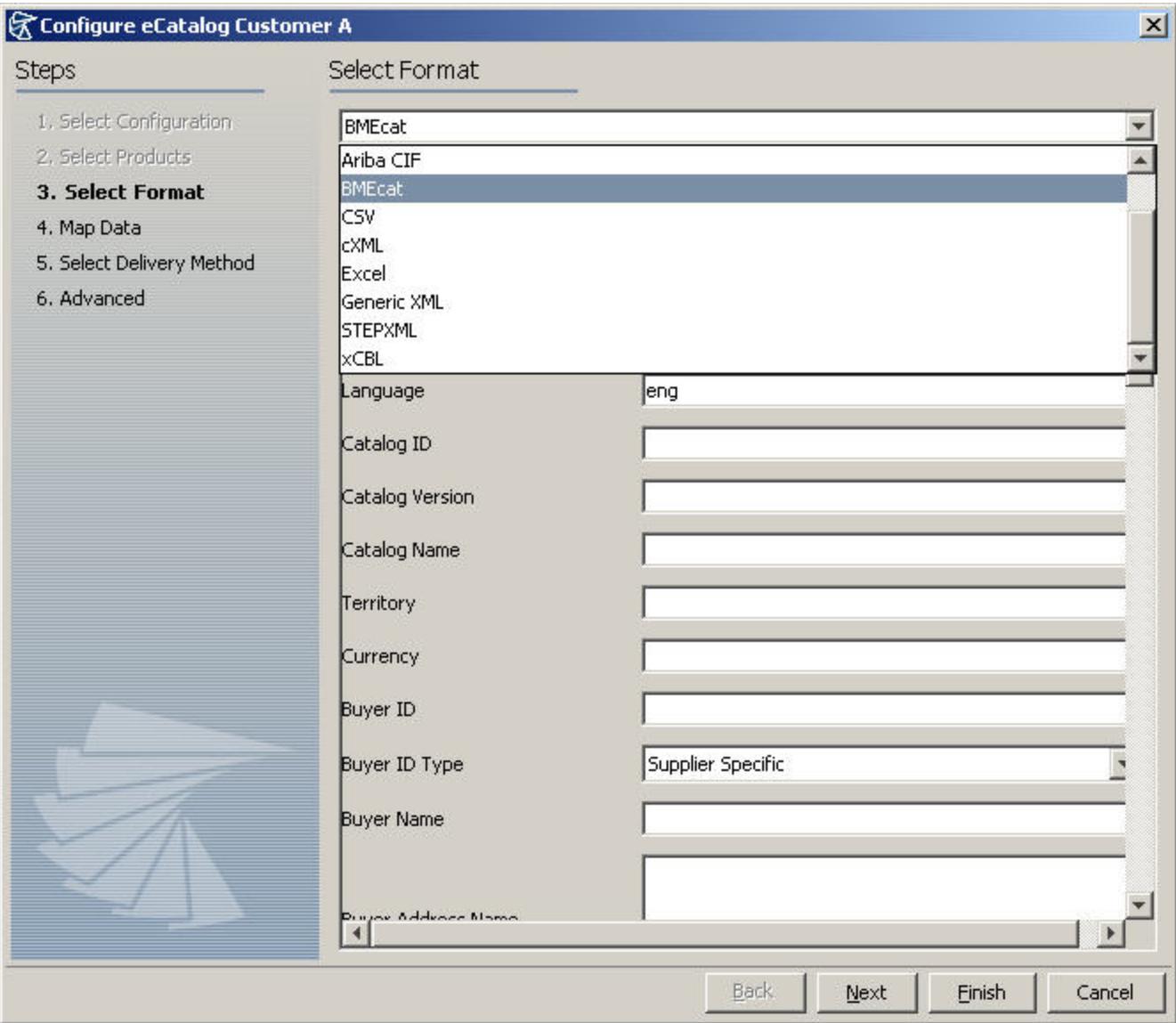
In case there is a need for the export to be self-contained, you can activate the checkbox for self-contained references on this step. This will make sure that no references will be allowed to point to anything outside of the export. Using the self-contained feature creates the side effect of printing all inherited links to the export XML, the user should be aware of this as these links are not printed in the normal export.

6. Click **Finish**.

Configure eCatalog Configuration with BMEcat as Export Format

The **Configure eCatalog** wizard opens with step 3, **Select Format**.

1. Select **BMEcat** from the list of formats.

Then the window will look like this.

Now you can enter further information related to the BMEcat format.

2. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 4, **Map data**.
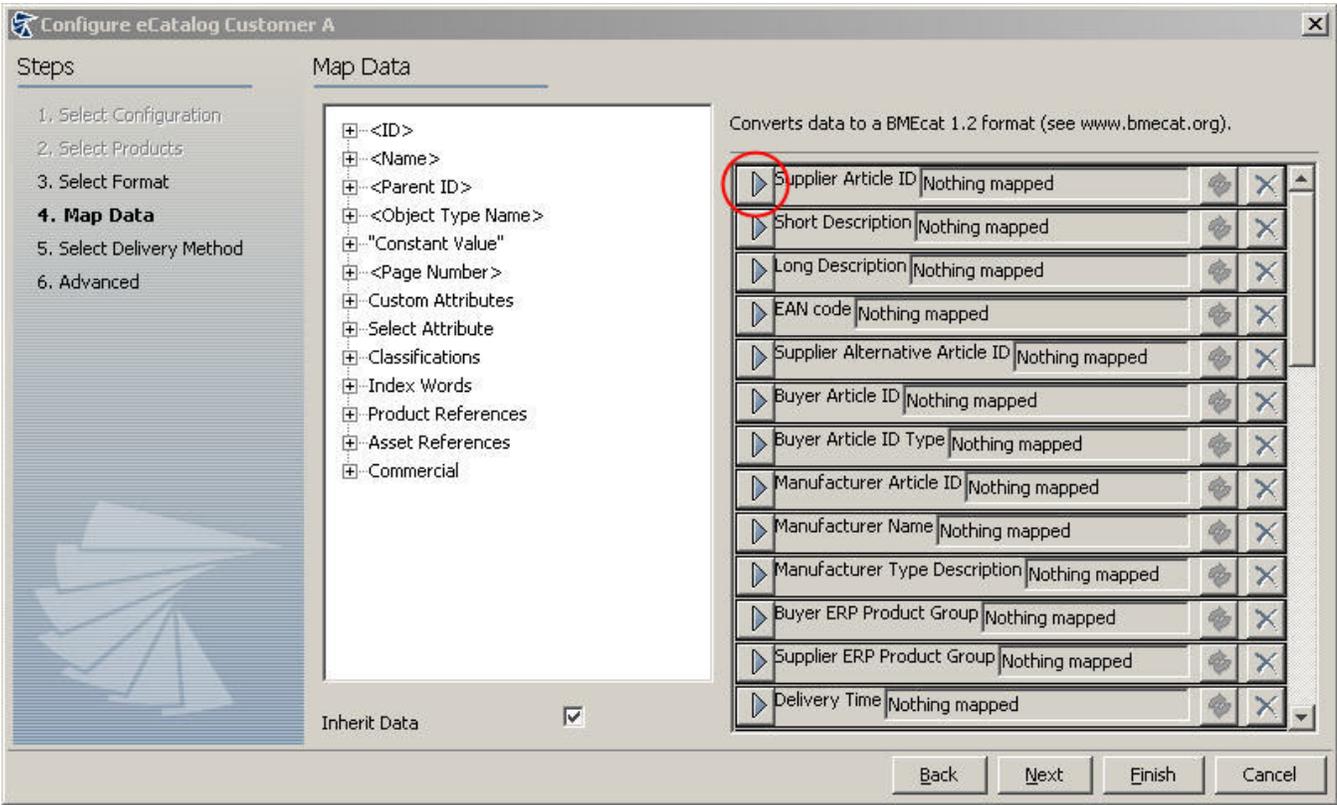
To map data, click on the wanted piece of data, for instance <ID>, and then click the arrow button in the right part of the window. Then the <ID> will be added to the list of data to be exported shown to the right.
Continue mapping all the data that you want to export.

Note: Note: Two BMEcat fields are mandatory in connection with STEP and need to be mapped in order to export an eCatalog configuration, namely **Supplier Article ID** and **Price**.

When mapping from a price list you will be asked to enter the quantity break. A price list can contain multiple prices for the same product in different quantities and/or date spans. The quantity breaks are numbered from 1 and up.
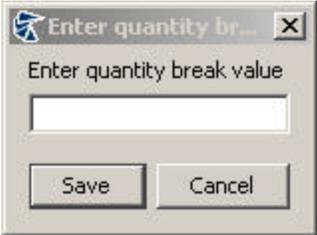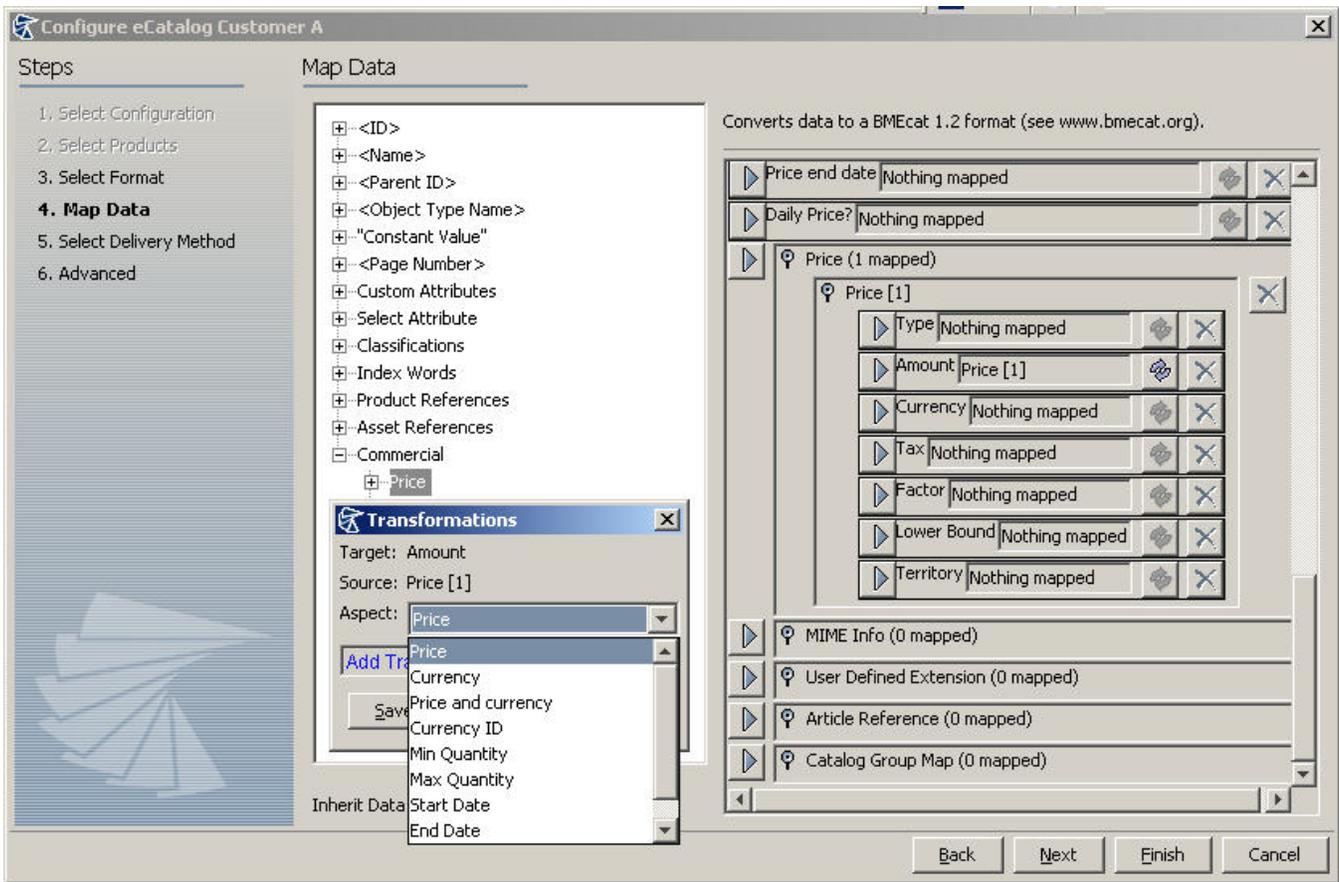

Here is an example of quantity breaks:

Quantity	Price	Quantity break
<5	9.99	1

| Quantity	Price	Quantity break
6-10	9.50	2
11-50	8.99	3
>50	8.05	4

When mapping a price attribute you have the same transformations available as you would have for a product attribute, but the available aspects differ.

To open the **Transformations** dialog, click the button to the right of the Price value in the list of mapped values.
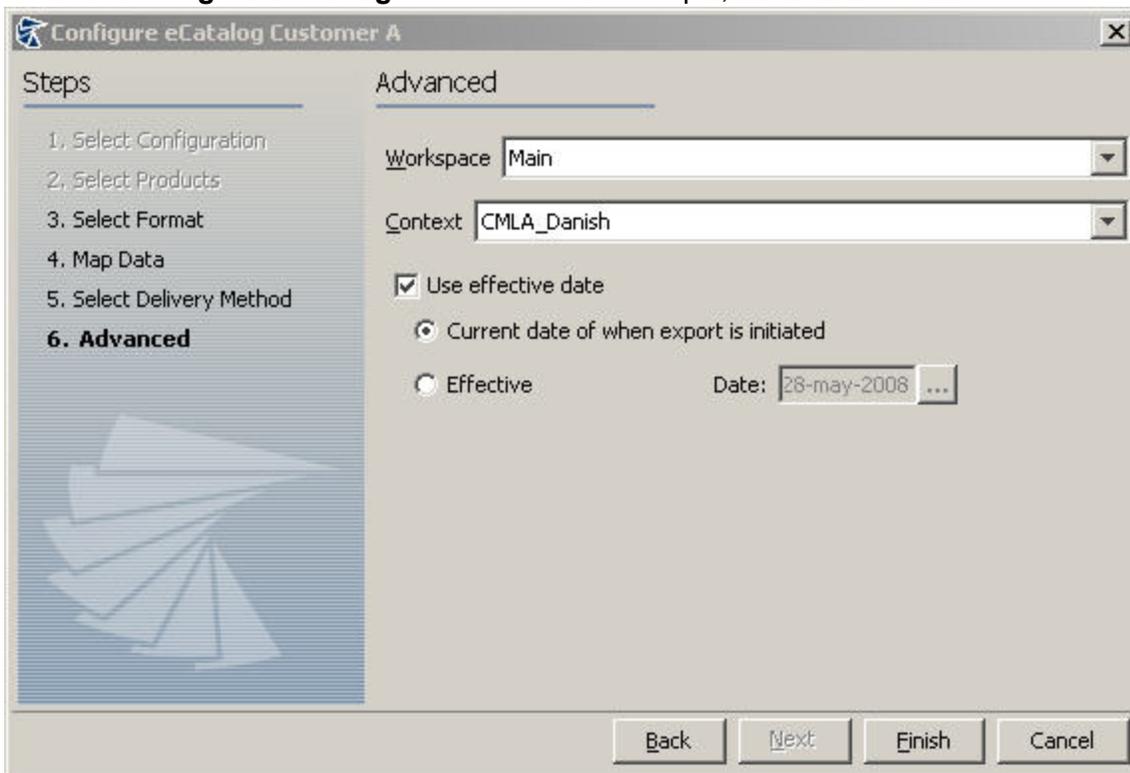
3. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 5, **Select Delivery Method**.
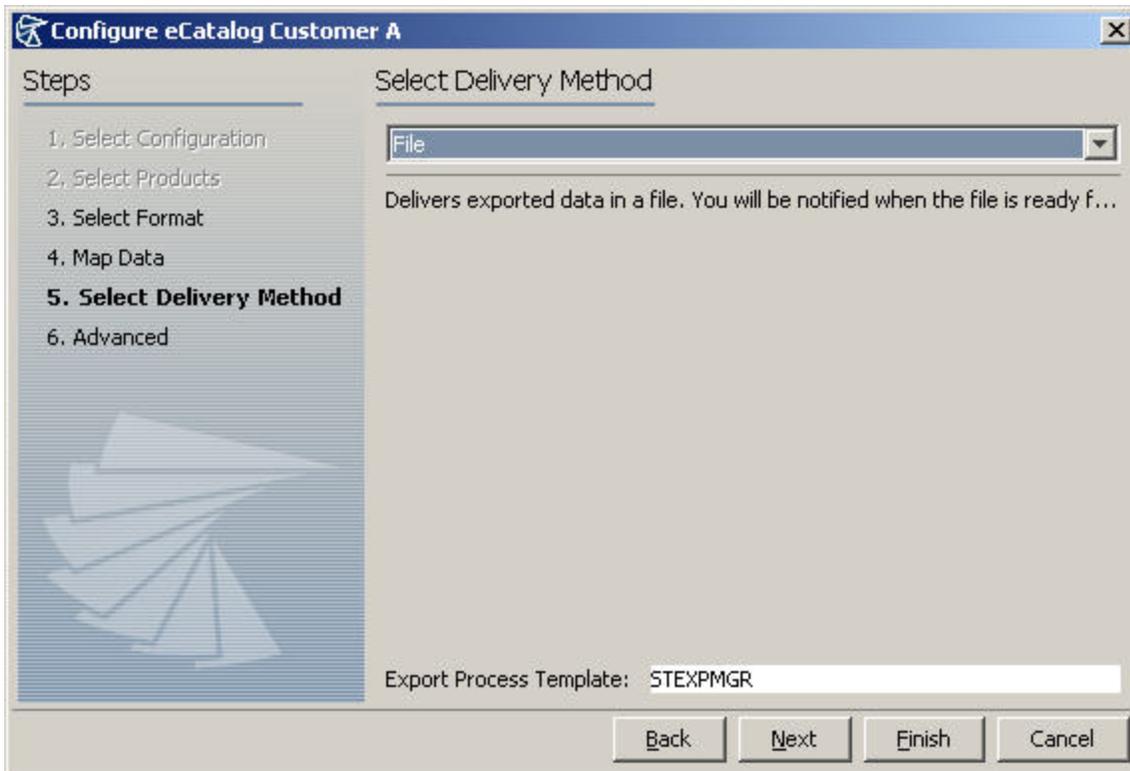
4. Select delivery method, for instance **File**.

5. Click **Next**.

Then the **Configure eCatalog** wizard moves on to step 6, **Advanced**.

On the **Advanced** page you can specify the **Workspace** and **Context**.
In case prices to be exported have been provided with start and end date, you can use the effective date to ensure that they will only be included in the export if the effective date lies within the specified period. If no date span has been selected for prices, effective date will have no effect. Further, you can select between using the current date when the export is initiated or enter a specific date.

Exporting an eCatalog

1. In the **Tree**, right-click the relevant eCatalog, and then select **Export eCatalog**. The **Export eCatalog** wizard appears.

2. In Step 2, **Refresh Collection**, select **Refresh before each run** if you want the collection to be refreshed before each export.
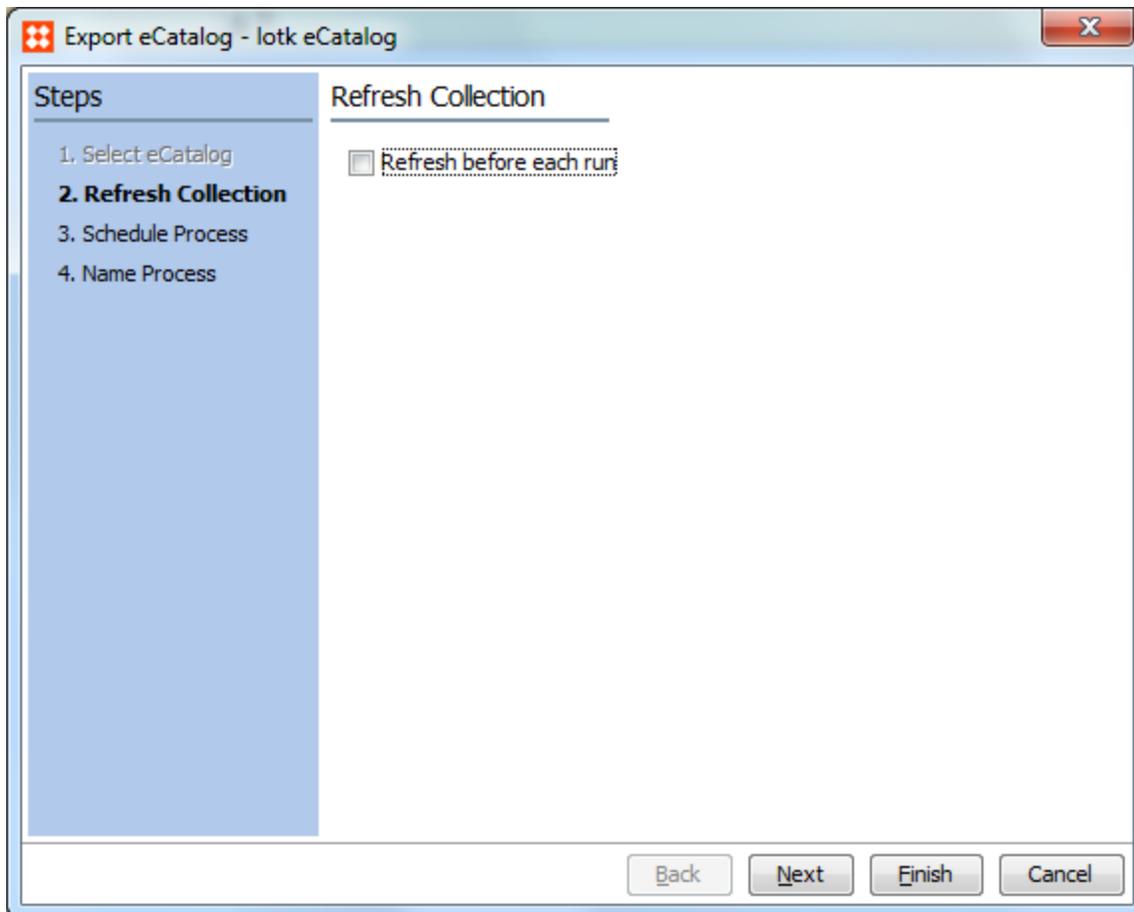
3. In Step 3, **Schedule Process**, specify whether you want to export the eCatalog immediately or at a specified time in the future. You have the following options:

- **Now:** Starts the eCatalog Export process and delivers the eCatalog as specified in the eCatalog Configuration.

- **Later:** Schedules a single delivery in the future at the specified time and date.

- **Weekly:** Schedules a recurring eCatalog export for one or more of the days of the week. This option requires a time, a start date, and optionally an end date. If no end date is specified, the eCatalog scheduling process runs until it is ended manually.

- **Monthly:** Schedules a recurring export of the eCatalog for a specific day of every month.

- **Later and repeat:** Schedules delivery in the future at the specified time and date and at an interval given in minutes.
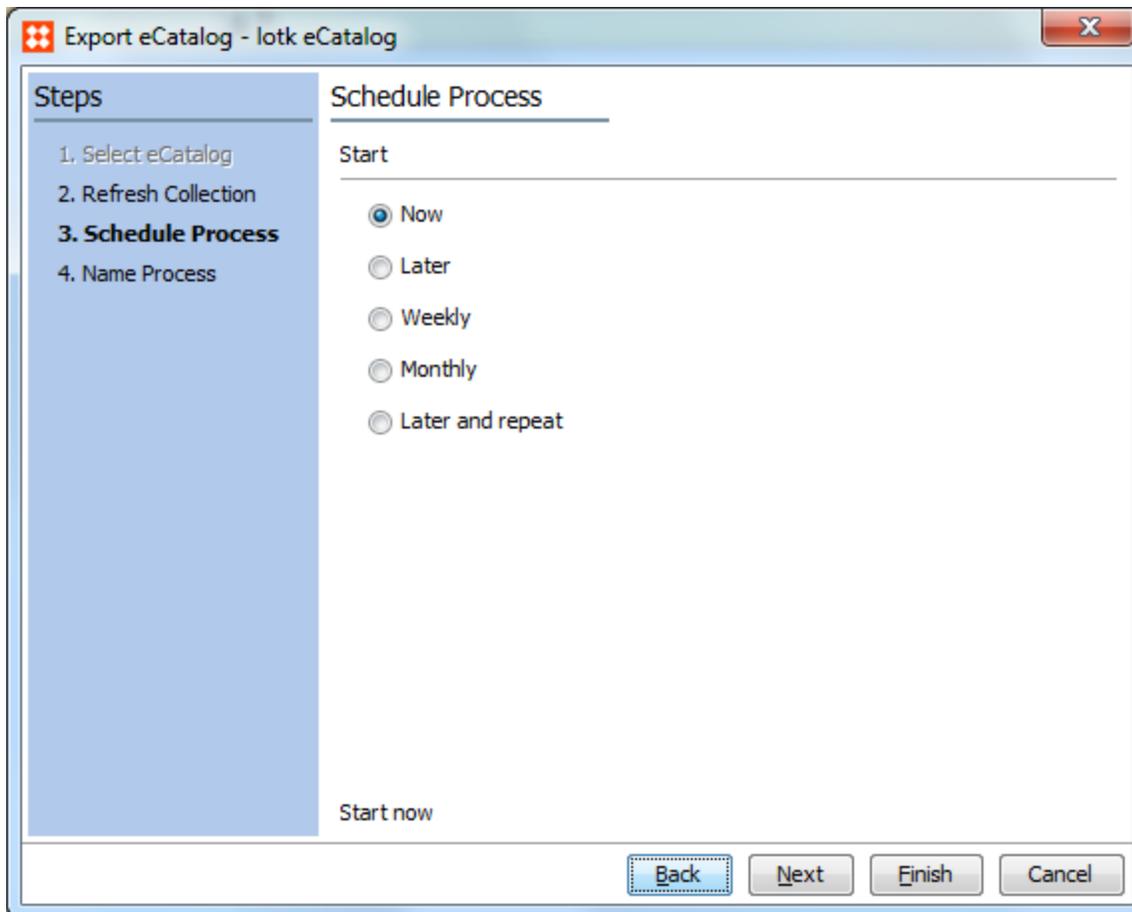
4. In Step 4, **Name Process**, provide a name for the process. An auto-generated name is provided, but you can change it to make it easier to identify the process.
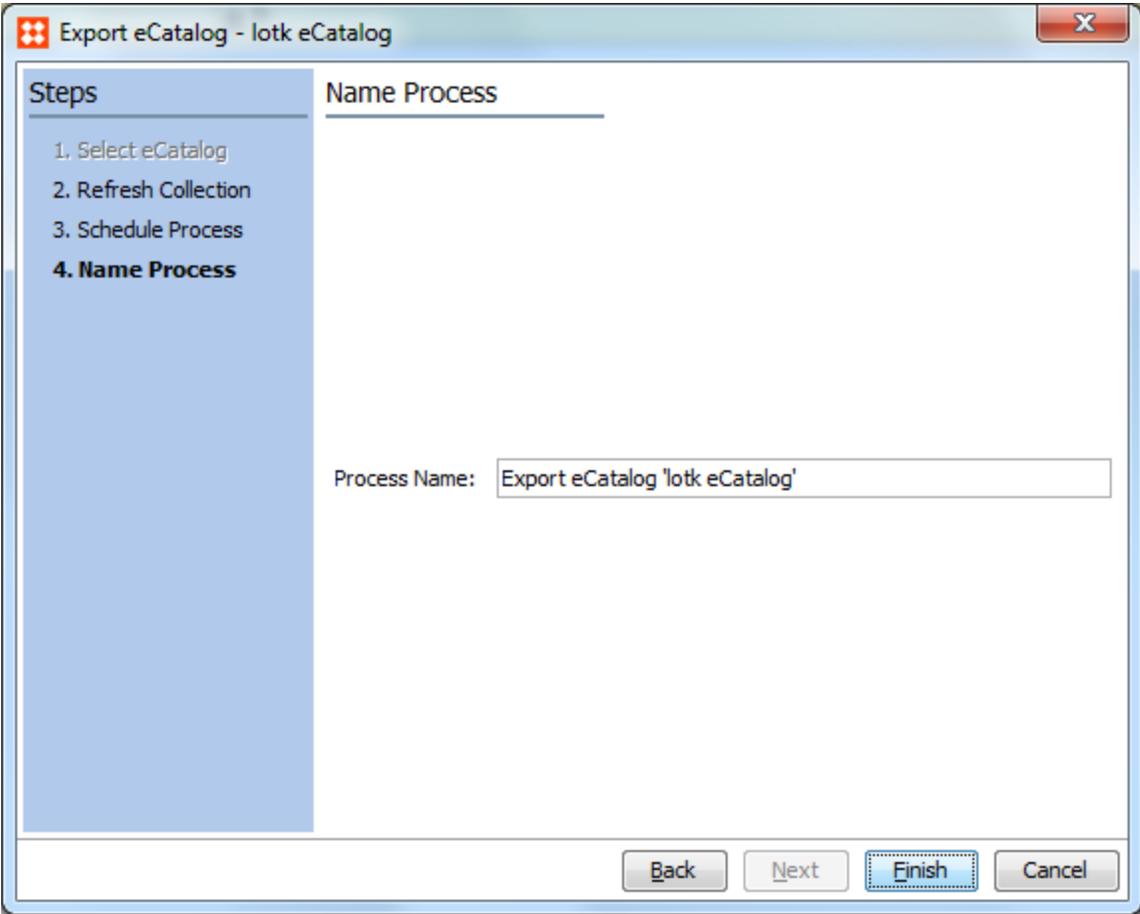
5. Click **Finish** either starts the export process or a scheduling process depending on the specified settings.