

GETTING STARTED 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 right side of a large orange triangle that points to the right, which is located on the left side of the page.

StiboSystems

STEP Trailblazer 8.1

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Getting Started with STEP

This section is intended to provide users with an introduction to the STEP system and concepts. Additionally, it provides detailed information needed to perform basic data maintenance tasks in STEP, including detailed descriptions of the workbench interface and search functionality. While geared towards end users, the guide provides information that is necessary for all users to understand as a foundation for more advanced topics.

This guide is centered around the STEP Workbench, but the concepts and functionality presented are often applicable to both the workbench and Web UI interfaces. Because of this, it is helpful for users of either interface to be familiar with the material in this guide. For documentation specific to the Web UI, see the Web User Interfaces guide.

The Getting Started guide contains the following sections.

- **Introduction:** This section includes a terminology table and an overview of some basic STEP concepts. This material should be understood prior to proceeding through the guide as it lays the foundation for the subsequent topics.
- **STEP Workbench UI:** This section introduces the user to the workbench interface, as well as providing detailed reference information for the various functions, including toolbar actions and menu options.
- **Object Maintenance in Tree:** This section provides an overview of creating, editing, and deleting objects in the workbench, as well as providing detailed information for working with particular types of objects.
- **Navigation and Searches:** This section introduces the user to basic search and navigation functionality in the STEP Workbench, as well as providing detailed descriptions of the search criteria available on the Search tab.
- **Keyboard Shortcuts:** This topic provides a list of keyboard shortcuts that can be used in the workbench.

Introduction

This section introduces the reader to basic STEP terminology and concepts. This information provides a foundation that is key to understanding the subsequent materials.

- **STEP Terminology:** A table defining basic STEP terms, including links to topics with additional information.
- **Basic STEP Concepts:** Introduces some core concepts in STEP to facilitate understanding of the Getting Started and System Setup guides.
- **Object Super Types:** Provides an introduction to the STEP object super types, including links to detailed information for each type.

STEP Terminology

This topic provides definitions for basic STEP terminology that is helpful to be aware of when reading the online help. Links to additional material on related topics are also provided, when appropriate. This should not be considered a complete list of all STEP terms as it is intended to cover only the more commonly used terms that users are likely to encounter throughout the online help.

A

Term	Definition	Further Reading
Action	Type of business rule that can be executed to manipulate data or perform an action. Actions can be executed by various processes and events within the system. For example, at approval of an object, within a workflow (on entry to a state, exit from a state, on the transition between tasks, or when a deadline has been met), as part of an import process, or from a bulk update process.	See the Business Actions topic in the Business Rules documentation.
API	<i>see Public API</i>	See the STEP API Documentation link on the WebStart page.
Approval	The process of pushing data from the Maintenance workspace to the Approved workspace in STEP. Approval can be associated with business logic that may prevent approval or may perform automated data updates during approval. Approvals are often the triggers for sending data to downstream systems.	See the Approval of Objects topic in the STEP User Guide / Getting Started documentation.
Asset	Any type of digital media, such as an image, Word document, PDF, Excel file, PowerPoint, JPG, GIF, etc.	See the Assets topic in the STEP User Guide / Getting Started documentation.
Asset Push	A process that exports assets from STEP to a file system. Conversion templates can be applied to transform images, for example from high res to low res, resizing, applying color scales, etc, though assets can also be sent as-is simply to make them available on the file system.	See the Asset Push topic in the Digital Asset Exchange guide.
Assignee	The user or group to which a task is assigned for work to be performed within a workflow. User states can be assigned directly to a named user or to a user group. When a state is assigned to a user group the task is "offered" to all members of that group. To perform the task associated with the state, a member of the group has to claim the task. Once a task is claimed it is no longer visible in the group task list; only the person who claimed the task is able to see it. A user may subsequently release a task back to the group.	See the Assignees in Workflows topic in the Workflows documentation.
Attribute	A characteristic or detailed piece of information related to a particular object. Attributes can be one of two types, description or specification. Description attributes are available on most object types in STEP, while	See the Attributes topic in the Super User Guide /

Term	Definition	Further Reading
	specification attributes are only available on objects in the Primary Product Hierarchy.	System Setup documentation.
Attribute Group	Groups attributes, reference types, and/or link types. Attribute groups can have sub-groups.	See the Attributes Groups topic in the Super User Guide / System Setup documentation.
Attribute Value	The value stored in a particular attribute on a particular object.	See the Attributes topic in the Super User Guide / System Setup documentation.

B

Term	Definition	Further Reading
Bookmark	A placeholder created by the user that serves as a shortcut to a previously viewed location.	See the Bookmarks topic in the STEP User Guide / Getting Started documentation.
Business Rule	Automated piece of programming logic that may implement customer-defined rules, such as validations, automatic updates, notifications, data-driven workflow routing, etc. Also see Condition and Action.	See the Business Rules topic in the Business Rules documentation.

C

Term	Definition	Further Reading
Calculated Attribute	An attribute where the value is calculated according to a specific formula defined for this attribute. The formula may include static text, other attribute values, information from references on the	See the Calculated Attributes topic in the System Setup /

Term	Definition	Further Reading
	object, and a number of other options.	STEP Super User Guide documentation.
Category Profile	View in STEP that helps product managers and data analysts to get an overview of an entire section of the Product Hierarchy through various metrics that are displayed in dashboard format.	See the Data Profiles topic in the Data Profiling documentation.
Character Tag	An entry that begins with “<” and ends with “/>” such as <check/>. These tags represent characters that may not be found in the special character map in Unicode, or may be used instead of the Unicode character.	See the Tags topic in the System Setup / STEP Super User Guide documentation.
Claim	The action that a user performs to take a task in a workflow out of a group queue and assign to himself / herself.	See the Claiming / Releasing Tasks in Workflows topic in the Workflows documentation.
Classification	A particular type of hierarchy that organizes groups of objects or assets. Objects are linked to classifications via references, and may have references to multiple classifications. Also referred to as "yellow folders".	See the Classifications topic in the Getting Started / User Guide documentation.
Collection	An object that holds a static set of objects, or a dynamic search criteria that can be refreshed as needed to find the latest matching objects. Using collections, the resulting data can be displayed, bulk actions can be performed, or the objects can be exported.	See the Collections topic in the Getting Started / User Guide documentation.
Completeness Score	A measurement within STEP, expressed as a percentage, to indicate the proportion of key data that has been completed for a particular object. This key data is configurable, as well as the weighting of importance.	See the Object Completeness topic in the Data Profiling User Guide documentation.

Term	Definition	Further Reading
Condition	A condition is a type of business rule that evaluates to either true or false. In relation with approval, a condition can act as validation for whether an approval action can be carried out. In relation to workflows, conditions can be used to prevent a transition from being taken if certain conditions are not met. A condition may not change data.	See the Business Conditions topic in the Business Rules documentation.
Context	A specific filter placed on the system data. Each context is a combination of different dimensions such as language, country, and so forth, for example, English US, French CA, or German DE. Data may vary based on context.	See the Contexts topic in the System Setup / Super User Guide documentation.

D

Term	Definition	Further Reading
Data Model	Basic system configuration defining the allowable structures and make up of data within STEP. Consists of system setup data, including: dimensions, contexts, object types, reference types, keys, component models, attribute groups, attributes, lists of values, units, and tags.	See the System Setup / Super User Guide.
Deadline	Optional setting within a workflow for time allowed for a task to be completed. If a deadline expires on a task, it is possible to perform an escalation.	See the Deadlines and Escalations in Workflows topic in the Workflows documentation.
Derived Data	Data that is not directly imported or migrated, but is instead derived by the STEP system as part of or following import or migration. Consists of translation status, asset push status, asset push content, approval status, and any data constructed or transformed by business rules or calculated attributes.	
Dimension	A definition of the context-sensitive domain in STEP, such as language or country, which allows for different layers of information in which content can vary. Each system must	See the Dimensions and Dimension Points

Term	Definition	Further Reading
	have at least one dimension and attributes and references may be dimension-dependent. For example, the color name can differ per language (e.g. red and rouge) when the language represents the dimension.	topic in the System Setup / Super User Guide documentation.
Dimension-Dependent Attribute	An attribute that can have different values for different dimension points, where the actual value is determined by the context in which the attribute is presented.	See the Dimension Dependent Attributes topic in the Super User / System Setup documentation.

E

Term	Definition	Further Reading
Entity	A group of master data that has a specific business meaning. Entities typically store product-neutral data in STEP according to client-specific groupings of information, such as customers, employees, suppliers, and addresses. Entities are also often used to store reference data that is utilized within the system. Entities can be grouped into a hierarchy using reference types that are only valid from an entity object to an entity object. A source object can be displayed as a child of the target object or the target as a child of the source.	See the Entities topic in the Getting Started / STEP User Guide documentation.
Escalation	The action(s) to be taken when a deadline expires within a workflow. Escalations require at least one business rule to be configured, which is triggered by the escalation.	See the Deadlines and Escalations in Workflows topic in the Workflows documentation.
Event	Events are recorded actions within the system, such as an approval, transition in a workflow, or a change in globally revised data. Within workflows, events are also the names assigned to particular transitions.	See the Events topic in the Super User / System Setup documentation.
Event Queue	Queue to store events that have occurred on the system, to later be	

Term	Definition	Further Reading
	processed by an asset push, outbound integration endpoint, or event processor.	
Externally Maintained Attribute	A characteristic of an attribute or reference that can be set to 'Yes' or 'No'. A 'Yes' selection indicates that the data point is maintained externally, and a change in it does not trigger a change in approval status and/or a new revision on the STEP object on which the data was changed. A 'No' selection indicates that the data point is maintained internally and a change in it has the potential to trigger a change in the approval status and/or a new revision on the STEP object on which the data was changed.	See the Externally Maintained Attributes topic in the Super User / System Setup documentation.

F

G

Term	Definition	Further Reading
Golden Record	Collection of data from a variety of sources, based on matching, linking, and survivorship rules. The Golden Record is considered the trusted data record, compiled from the various source objects.	See the Golden Records Match Action topic in the Matching and Linking / Data Quality documentation.

H

Term	Definition	Further Reading
Hierarchy	A data structure composed of parents and children.	See the Object Type Hierarchy topic in the Object Types and Structures /

Term	Definition	Further Reading
		Super User Guide documentation.
Hotfolder	File system of folders where data can be dropped for automatic loading into STEP, based on the particular configurations and/or code applied to the hotfolder.	

I

Term	Definition	Further Reading
ID	The unique identifier for all objects within STEP. It cannot be translated or edited once created, and cannot contain special characters.	
Image Conversion	A series of parameters defining the way in which an image is transformed from the standard high resolution asset that exists in STEP to the required downstream format. Several conversion options are available by default, and additional conversions can be added via configuration and/or extensions. Note that conversions change assets as they are pushed from STEP, leaving the originating file unchanged in STEP.	See the Image Conversion Configurations topic in the Digital Asset Exchange documentation.
Inbound Integration Endpoint (IIEP)	Communication channel defining how data is received by STEP. Each endpoint defines how data is received from an external system, specifying location, transport protocol, data to be exchanged and other configuration parameters.	See the Inbound Integration Endpoints topic in the Data Exchange documentation.
Integration Endpoint (IEP)	Communication channel between STEP and external systems. See Inbound Integration Endpoint and Outbound Integration Endpoint.	See the Data Exchange documentation.
Inheritance	The ability to make data available in the product or classification hierarchy to lower nodes by linking it to a higher node in the	See the

Term	Definition	Further Reading
	hierarchical structure.	Inherited Attributes topic in the Super User / System Setup documentation.

J

K

L

Term	Definition	Further Reading
Library	Set of functions that can be reused in multiple business rules or other libraries. Libraries cannot be called independently and must be referenced from other actions or conditions.	See the Business Libraries topic in the Business Rules documentation.
List of Values (LOV)	A validation base type for an attribute that only allows a value to be considered valid if it belongs to a respective list of pre-configured values assigned to the attribute. Also used to refer to the value list itself. LOVs are also referred to as 'Domains' at times.	See the List of Values (LOVs) topic in the System Setup / Super User Guide documentation.
Localized Value	An attribute value that is set directly on an object and is not inherited from any level above in the hierarchy.	See the Inherited Attributes topic in the System Setup / Super User guide documentation.

M

Term	Definition	Further Reading
Mandatory Attribute	Indicates that the product and all its sub-products must have a value for the specified attribute in order for the object to be approved.	See the Mandatory Attributes topic in the Super User / System Setup documentation.
Multi-Valued Attribute	An attribute that can contain more than one value for a specific object.	See the Editing Multi-Valued Attributes topic in the Super User / System Setup documentation.

N

O

Term	Definition	Further Reading
Object	An element within the system, for example, a product, image, classification, attribute, workflow, business rule, etc.	See the Basic STEP Concepts topic in the Getting Started / User guide.
Object Type	A specific label for levels within a taxonomy, given to different elements within the system. Nearly every object in STEP is labeled with an object type to help identify what it is (i.e. a product or entity rather than an image, a TIF rather than a PDF, etc.). This includes entities, products, product categories, alternate hierarchies, images and other assets, attributes, and LOVs. Through	See the Basic STEP Concepts topic in the Getting Started / User guide.

Term	Definition	Further Reading
	<p>the use of object types, system administrators can control how rigid or loosely defined the database will be in terms of object creation and where objects are allowed to 'live' and/or be used. This labeling also becomes very important when working with exported data so that each type of object in STEP can be identified for special handling in web applications or other uses outside of STEP.</p>	
Orphan Attribute	<p>A specification attribute that has a value, which has been deleted from / not linked to a product node or classification and is denoted by italics.</p>	<p>See the Orphan Attributes topic in the System Setup / Super User Guide documentation.</p>
Outbound Integration Endpoint (OIEP)	<p>Communication channel defining how data is sent by STEP. Each endpoint defines how data is sent to an external system, specifying location, transport protocol, data to be exchanged and other configuration parameters.</p>	<p>See the Outbound Integration Endpoints topic in the Data Exchange documentation.</p>

P

Term	Definition	Further Reading
Post-Processor	<p>A plugin component within the IEP framework that allows STEP to act on the result of the import / export such as starting workflows, sending notifications, etc.</p>	<p>See the IIEP Configuration Flipper and the OIEP Output Templates Flipper topics in the Data Exchange documentation.</p>

Term	Definition	Further Reading
Pre-Processor	A plugin component within the IEP framework that allows STEP to modify the message prior to import / export. It can be used for various functionality such as prevalidation, format conversion, filtering, etc.	See the IIEP Configuration Flipper and the OIEP Output Templates Flipper topics in the Data Exchange documentation.
Primary Product Classification (PPC)	Hierarchy that allows for different types of objects to be stored once in the database; each object within this hierarchy has a unique ID / identifier and may have only one location within the hierarchy. Also referred to as the 'blue hierarchy'.	See the Object Type Hierarchy topic in the System Setup / Superuser documentation.
Product	One of the object super types, referring to any object within the Primary Product Classification (blue hierarchy).	See the Products topic in the Getting Started / User Guide documentation.
Product Template	InDesign templates that determine what type of data will appear on a printed page, including the positioning and styling.	See the Product Templates topic in the Publisher / STEP'n'design documentation.
Product Variant	Data type used to model multiple variants of a similar object. For example, T-shirts in various sizes and colors could all be variants of a single product.	See the Product Variants topic in the Super User Guide / System Setup documentation.
Proof View	A tab in the STEP workbench which displays a product template view of the current STEP data without the user needing to use InDesign.	See the Generating Proof Views

Term	Definition	Further Reading
		topic in the STEP'n'design documentation.
Publication	One of the super types, referring to objects in the publication (green) hierarchy.	See the Publications topic in the User Guide / Getting Started documentation.
Public API	The set of server-side functions that have been exposed to be used in the business logic. This includes many functions to create, get, and set data, such as values and references. It also includes various methods for logging as well as sending emails.	See the STEP API Documentation link on the WebStart page.
Purge	Removal of an object from the database. Following purge, an object cannot be revived.	See the Managing Revisions in STEP topic in the Super User / System Setup documentation.

Q

Term	Definition	Further Reading
Queue	The mechanism within the IIEP framework that allows messages to be processed in an asynchronous way. The queuing concept allows separating processes from different IEPs as well as controlling the degree of parallel imports (a queue size of one guarantees sequential import, while a queue size larger than one allows parallel processing of multiple messages for increased throughput where sequential execution is not required).	See the Background Process Queues topic in the System Setup / Super User Guide documentation.

R

Term	Definition	Further Reading
Reference	Relationship between objects within the STEP system.	See the Reference and Link Types topic in the Super User / System Setup documentation.

S

Term	Definition	Further Reading
Special Character	A character that cannot be found on a standard keyboard but can usually be found in the Windows character map. Ex: Trademark Symbol - ™	See the Tags topic in the Super User / System Setup documentation.
State	A step within a workflow to which a specific user, user group, or system can be assigned to complete the task (s) associated with the state.	See the Creating a Workflow topic in the Workflows documentation.
STEP = Stibo Enterprise Platform	Master data software application that provides business managers a single source database to store, manage, and re-purpose product information for publication or syndication.	
STEP'n'Design	STEP's plug-ins for InDesign that allow data from the STEP database to be pulled onto pages.	See the About STEP'n'design topic in the STEP'n'design User Guide documentation.

Term	Definition	Further Reading
STEPXML	The native XML language for STEP, which can be used for importing / exporting data in STEP, as well as transferring configurations between STEP systems.	See the STEPXML Format topic in the Data Exchange documentation.
Super type	A major category of data within STEP. STEP super types are: Asset, Classification, Entity, Product, and Publication. See the specific definition for each super type for additional information.	See the Object super types topic within the Getting Started / User guide.
Super User	A user that is given administrative privileges within the STEP system.	See the Actions Sets topic in the Super User / System Setup documentation.

T

Term	Definition	Further Reading
Task	The work and/or action that must be completed within a specific workflow state (whether by a user or via automation).	See the Working with Tasks in Workflows topic in the Workflows documentation.
Transition	The change of tasks from one state to another within a workflow.	See Creating a Workflow in the Workflows documentation.

U

Term	Definition	Further Reading
Unique Key	A unique key is a system entity that represents a specific object in the STEP system. The entity is composed of one or more data points, whether utilized as-is or in a combined and/or transformed format using a specified formula. There can be exactly one record for each object for each defined key. No two objects with the same unique key for an active key can exist.	See the Unique Keys topic in the System Setup / Super User documentation.
User Permissions	Rules that allow or restrict users from performing certain functions within the system.	See the Privilege Rules topic in the Super User / System Setup documentation.

V

Term	Definition	Further Reading
Validation Base Type	A characteristic of attributes that identifies the format of the accepted data for the attribute value, such as whether the value is a date, integer, fraction, text, LOV, etc.	See the Validation Rules topic in the System Setup / Super User documentation.

W

Term	Definition	Further Reading
Web UI	A web-based interface to access the STEP database in order to read, edit, or download data and assets. Multiple Web UIs can be configured for each STEP installation.	See the Web User Interfaces topic in the Web UI documentation.

Term	Definition	Further Reading
Workbench	An interface for managing data in STEP, as well as carrying out administrative functions.	See the STEP Workbench UI topic in the Getting Started / STEP User Guide documentation.
Workflow	Business process(es) modeled as a series of states and tasks that can be executed by users and/or automatic processes within the STEP system. Workflows prompt the next step of a process to be started, by either creating a task for a user, or sending an alert. Workflows may contain a number of process steps or tasks, as well as business logic.	See About STEP Workflows in the Workflows documentation.
Workspace	A set of independent 'copies' of the database objects that provides a revision-specific view of objects. Workspaces are organized into Main and Approved areas. The Main workspace is where data maintenance takes place. The approved workspace is a non-editable snapshot of data that has been determined to have been acceptable for publishing to downstream systems.	See the Workspaces topic in the Super User / System Setup documentation.

X

Y

Z

Basic STEP Concepts

This topic introduces the reader to some fundamental STEP concepts that provide a foundation for the rest of the material in the Getting Started / User guide, as well as the System Setup / Super User guide. The focus of this topic is on data structures and data management, and is *not* intended to be an introduction to the full capabilities of a STEP system.

Object Types Overview

Technically, nearly everything in STEP is an object, and object types must be defined for which instances of objects can exist. Object types provide a specific label for levels within a taxonomy, given to different elements within the system. Nearly every object in STEP is labeled with an object type to help identify what it is (i.e., a

product or entity rather than an image, a TIF rather than a PDF, etc.). This includes entities, products, product categories, alternate hierarchies, images and other assets, attributes, and LOVs. Through the use of object types, system administrators can control how rigid or loosely defined the database will be in terms of object creation and where objects are allowed to "live" and/or be used. This labeling also becomes very important when working with exported data so that each type of object in STEP can be identified for special handling in web applications or other uses outside of STEP. Object types in STEP can largely be divided into two categories:

- **Tree Object Types:** Object types that make up the standard STEP hierarchies accessible on the Tree tab in workbench. Many of these object types can be further grouped into five categories of object types, referred to as the super types. Tree object types are defined in System Setup, but instances of the object types are accessed within the Tree.
- **System Setup Object Types:** Also referred to as Basic Object Types. This category encompasses all of the remaining object types that make up a STEP system. Among many other things, this includes attributes, users, integration endpoints, workflows, and business rules. System Setup object types are defined in System Setup, and instances of the object types are also accessed within System Setup.

More information on object types in general, including how to create and maintain object types, can be found in the **Object Types and Structures** section of the **System Setup / Super User** documentation.

Object Super Types

Each super type has specific characteristics that make it suitable for modeling particular types of data. For example, inheritance of data is available within the Product super type so objects that share data based on common characteristics are typically modeled using this super type. Alternatively, digital media files are housed using the Asset super type, which allows for automatic reading and storing of asset properties such as size and format. Any number of individual object types within each super type can be created. For example, a system may use both an 'Icon' object type and an 'Illustration' object type (along with any number of others) within the Asset super type.

The object super types are:

1. Assets
2. Classifications
3. Entities
4. Products
5. Publications

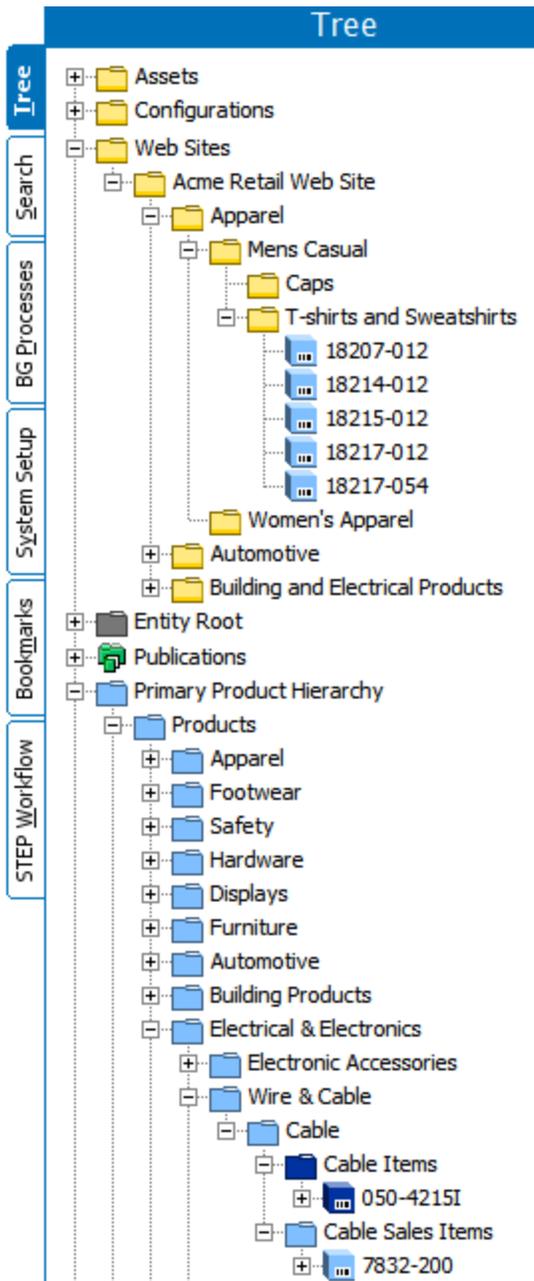
More information on the characteristics of the various super types can be found in the **Object Super Types** topic within this guide.

Object Types Versus Object Instances

Two core capabilities for managing data in STEP are the Tree tab and the System Setup tab. In order to successfully use STEP, it is critical to understand the differences between the functions available in these two areas, specifically in relation to *types* of objects versus *instances* of objects.

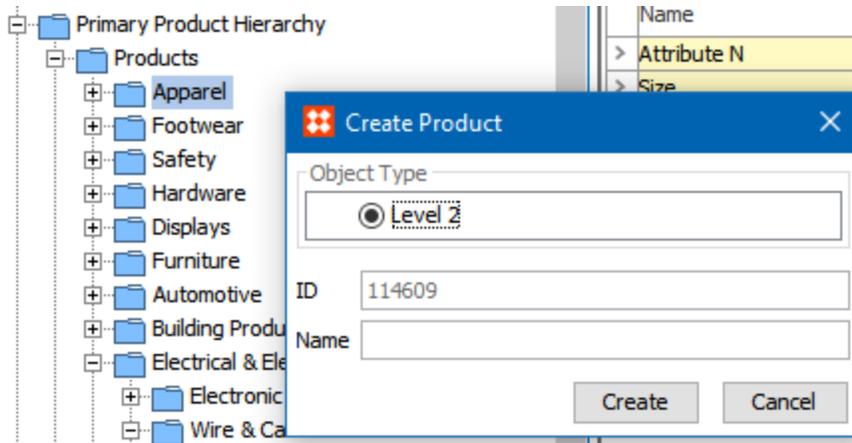
Technically, everything in STEP is an object, including workflows, attributes, business rules, export and import configurations, products, classifications, images, etc. However, the term "objects" is more generally used to mean assets, classifications, entities, products, and publications. In other words, the super types are also all things that you can find on the Tree tab in STEP. This section focuses on the differences between object types and object instances for Tree objects, specifically those that fall into the super types.

For example:



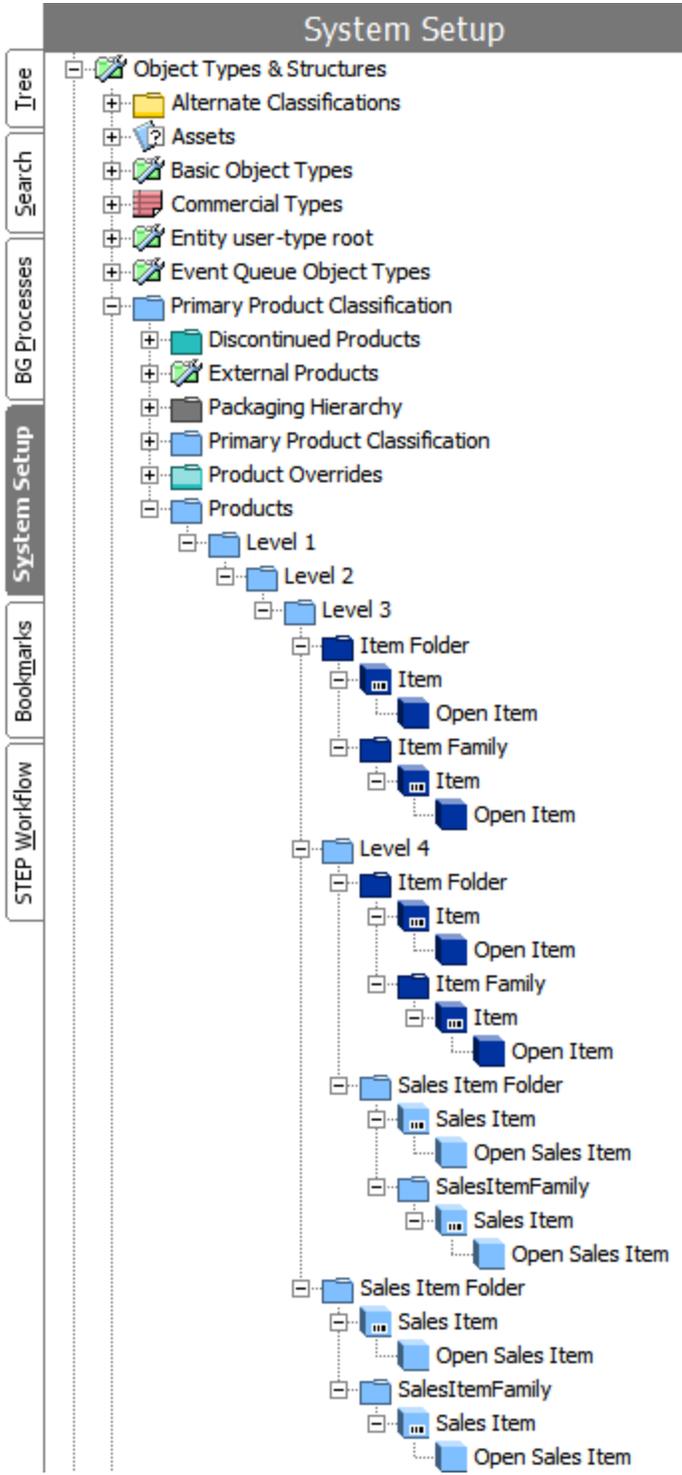
The objects and structures available in the Tree will vary based on your particular data model, but the concepts described here can be applied across any data model. Regardless of the specific names or structures, each node

on the Tree tab is an individual object that has a defined "place to live" within a hierarchy. A user can right-click on many of these objects and have a 'New...' option, such as 'New Product' or 'New Classification', allowing them to create a new node in the hierarchy. For example, when right-clicking on the 'Apparel' object and selecting 'New Product', a dialog appears with an option to create a 'Level 2' object.



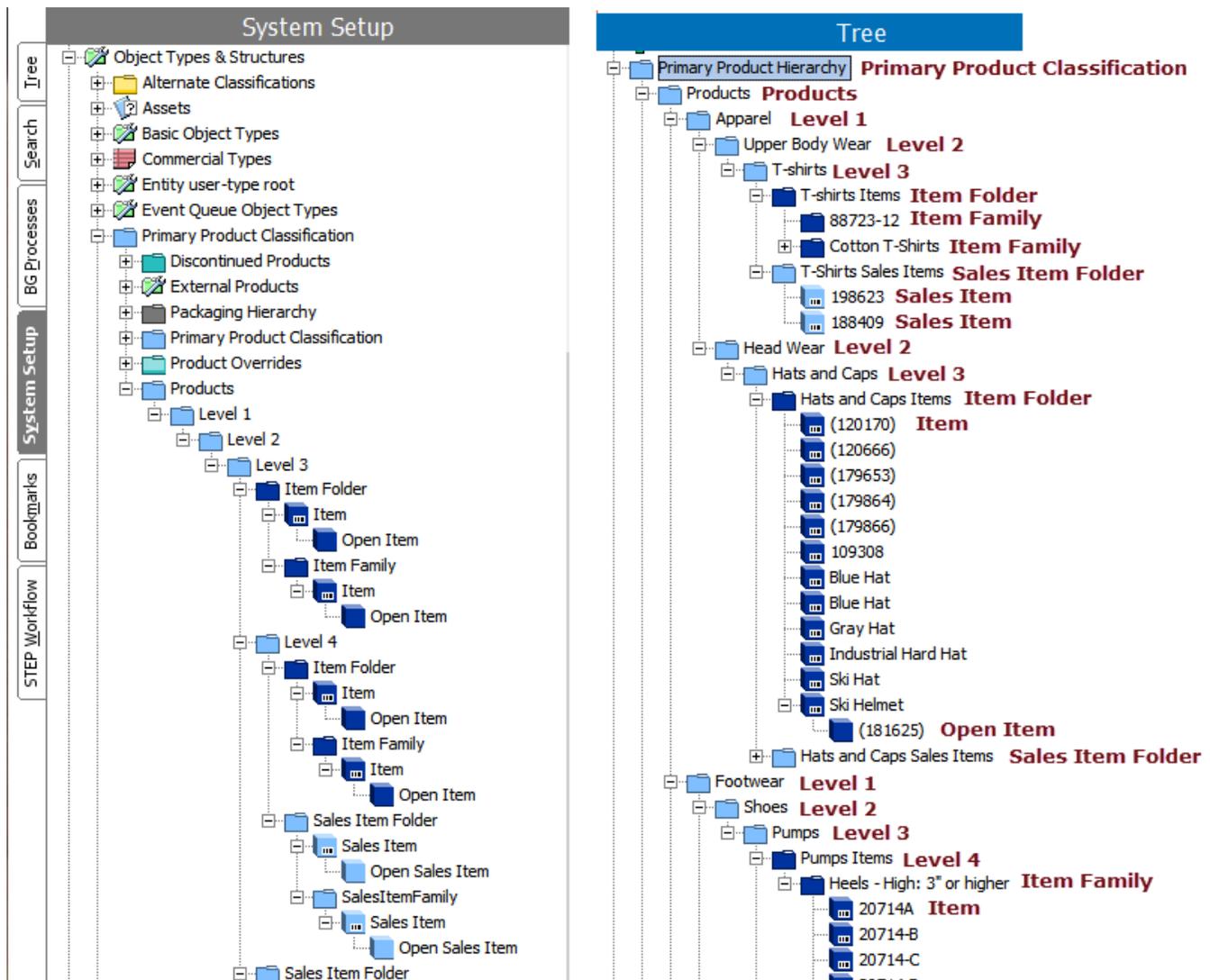
Typing a Name and clicking Create would create a new object as a child to the Apparel node. But defines that a 'Level 2' object can be created here? And that it is a Product (blue) object rather than an Entity (gray) or Classification (yellow)?

The allowable structure of objects and hierarchies that are accessed in the Tree are defined in System Setup. To continue with the above example, we can see that the defined object types and structures include a Primary Product Classification that has a number of levels. A Level 1 can only have a Level 2 child, which can in turn, can only have a Level 3 child. However, a Level 3 object type can have a number of child object types, including an Item Folder, Level 4, and a Sales Item Folder. A Sales Item Folder is a child of a Level 3 object type, as mentioned, but can also be a child to a Level 4. Similarly, a Sales Item can be child to multiple things, including a Sales Item Folder and a Sales Item Family.



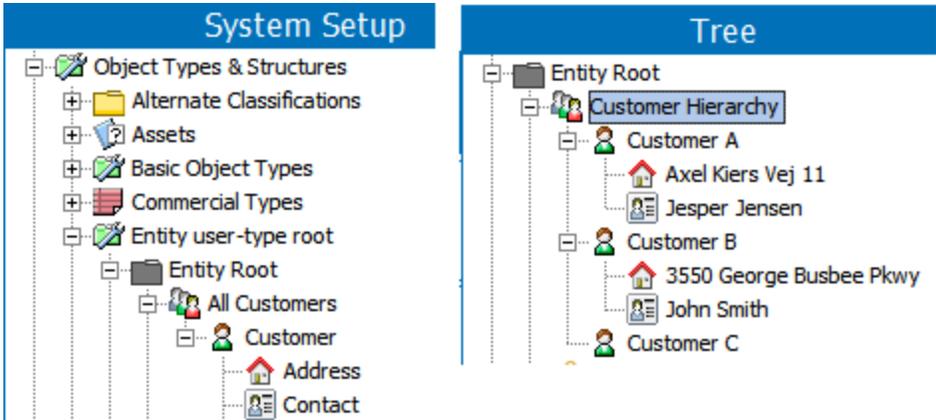
The object types defined in System Setup provide the "skeleton" for the allowable instances of objects that can be created in the Tree. It is important to understand that it is only the *structure* and *types* of objects that are defined in

System Setup, but any number of *instances* of the defined types can be created in Tree. This is best illustrated by viewing System Setup and Tree side by side, as shown below. Object instances are displayed in Tree, with red text indicating the corresponding object type designations from System Setup.

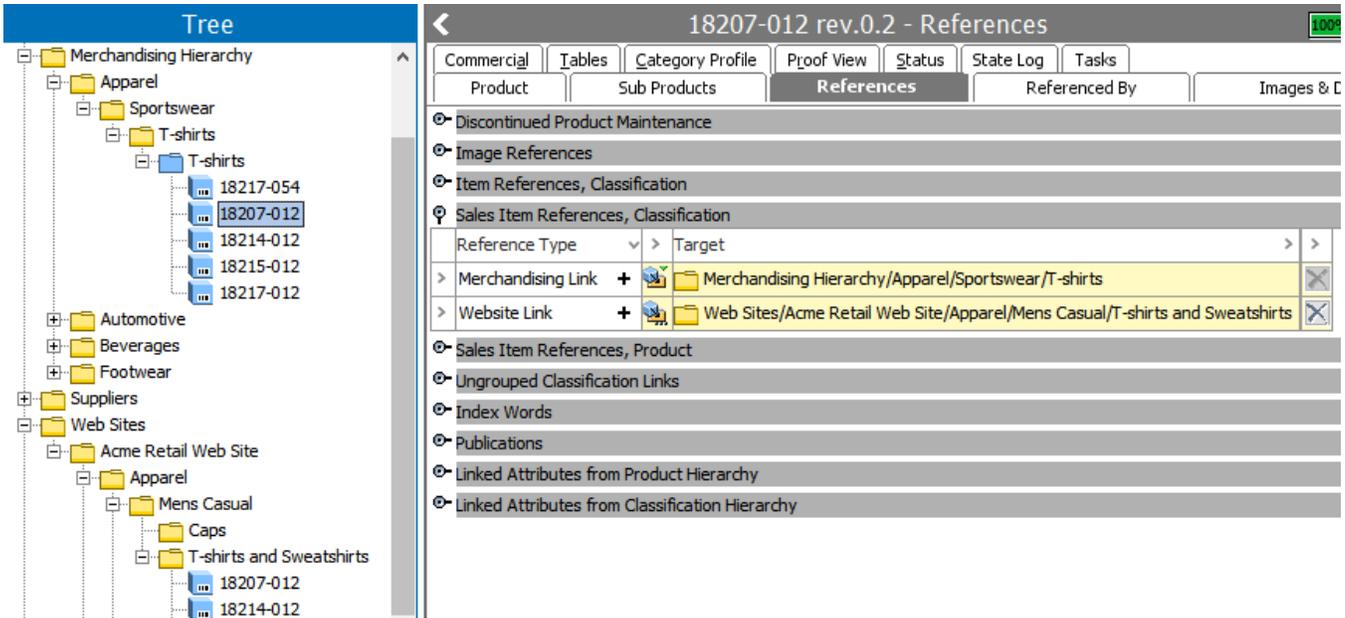


Notice in the above screenshots that a Level 2 object exists in System Setup only once, but we see multiple instances of it in Tree.

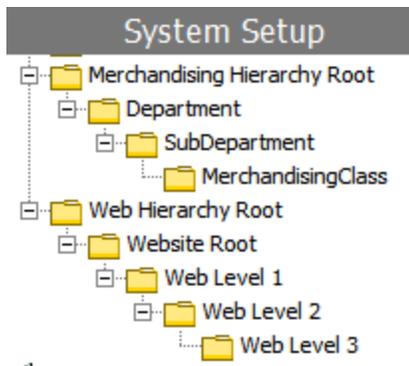
The same principles described for the Primary Product Hierarchy apply to all other hierarchies in STEP. For example, an entity hierarchy could have a Customer object type with allowable children of Address and Contact object types. The object types and structures are defined in System Setup, and instances of these objects can then be created in Tree.



Note that object super types can only exist within their designated hierarchy types. To clarify, a product hierarchy (blue hierarchy) can only contain object types of the product super type, while an entity hierarchy (gray hierarchy) can only contain objects of the entity super type. It is possible to have the visual appearance of mixed hierarchies, but this is accomplished via references rather than actual data structures. For example, products may appear in the Tree to be within a classification hierarchy, but this is due to references on the object, as shown below.



Notice that the corresponding System Setup structure for the above does not include the product object types.



The true residence of the product objects is within the Primary Product Classification, with a visual display of the product references into various classification hierarchies being just that: a visual display of references. However, assets are an exception to this concept. Assets are not part of the Classification structure in System Setup, but do in fact exist within this structure in Tree. Each asset must be linked in to one or more classifications, and this is the only location in which they "live" in STEP. Each asset automatically has a reference applied to each classification in which it is linked. More information on references can be found in the **Reference and Link Types** topic in the **System Setup / Super User** guide. More information on the various object super types and their characteristics can be found in the **Object Super Types** topic within this guide.

Using the above information, the questions posed earlier in this topic can now be answered:

Why can we only create a Level 2 object under the Apparel node? Because in this particular data model configuration the Apparel node is a Level 1 object type, and only Level 2 object types are allowed to be created under a Level 1 object type.

Why can't we create an Entity or Classification under the Apparel node? Because only object types within the same super type can exist within the same hierarchy. And even if this wasn't the case, the structure defined in System Setup in this particular hierarchy only allows a Level 2 object type (of the product super type) under a Level 1 object type.

Object Super Types

This topic provides an introduction to the STEP object super types. It will be helpful to have read and understood the **Basic STEP Concepts** topic in this guide prior to reading this material.

Object types that make up the standard STEP hierarchies accessible on the Tree tab in workbench are referred to as Tree Object Types. Many of these object types can be further grouped into five categories of object types, referred to as the super types. This topic introduces the five primary object super types in STEP. Understanding the differences between the various object super types is important when making decisions about how to model data in STEP.

Each super type has specific characteristics that make it suitable for modeling particular types of data. For example, inheritance of data is available within the Product super type so objects that share data based on common characteristics are typically modeled using this super type. Alternatively, digital media files are housed using the Asset super type, which allows for automatic reading and storing of asset properties such as size and format. Any number of individual object types within each super type can be created. For example, a system may

use both an 'Icon' object type and an 'Illustration' object type (along with any number of others) within the Asset super type.

The object super types are:

1. Assets
2. Classifications
3. Entities
4. Products
5. Publications

Each is described below, along with links to more detailed information for working with the various super types.

Assets

The Asset super type is used to hold any type of digital media, including images, videos, documents, and text files. Assets are organized within classifications, and can be linked to other objects in STEP using references. Specifically, assets can be linked to objects of the Classification, Entity, or Product object super types. Upon import, STEP populates some basic information about each asset, which can be viewed under the System Properties flipper on each asset, but cannot be edited. Default asset icons vary by file type, and can be updated by admin users.

The screenshot displays the STEP software interface. On the left is a 'Tree' view showing a hierarchical structure of folders. The 'Assets' folder is expanded, showing sub-folders like 'Icons', 'Illustrations', 'Installation Manuals', etc. A red box highlights a 'NEW!' icon and a 'ProductFolder.Icon' file within the 'Icons' folder. On the right is a detailed view of the selected asset, titled 'NEW! rev.1.1 - Images & Documents'. It features a 'Description' table and a 'System Properties' table. A red starburst icon with the word 'NEW!' is also visible on the right side of the detailed view.

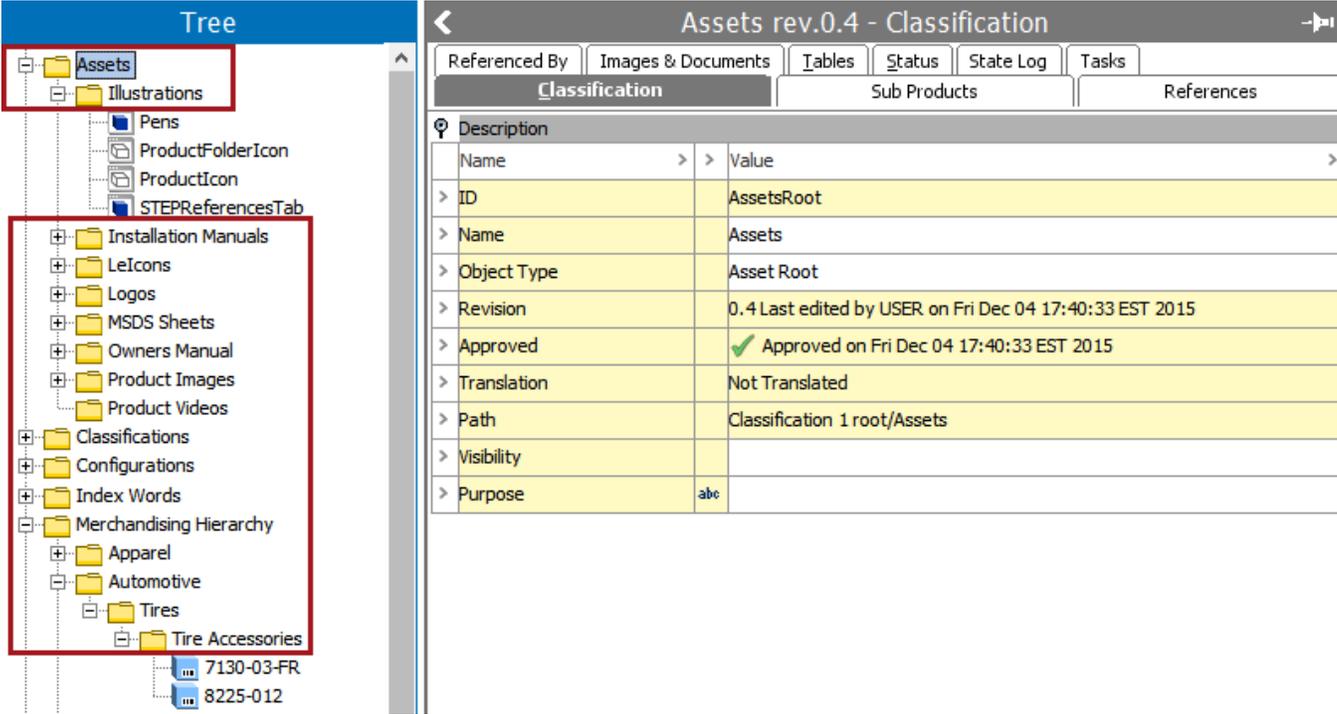
Name	Value
ID	111684
Name	NEW!
Object Type	Product Image
Revision	1.1 Last edited by USER4 on Fri Aug 19 14:42:18 EDT 2016
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Icons/NEW!

Name	Value
Gamma	12a 0.45
Class	abc Indexed color
Colors	abc 16
Colorspace	abc RGB
Compression	abc Zip
Depth	11: 1 (bits/sample)
Extension	abc png
Filename	abc NEW!.png
Format	abc PNG (Portable Network Graphics image)
Height	123 231.47 (mm)
MIME Type	abc image/png
Pixel Height	11: 656 (pixels)
Pixel Width	11: 657 (pixels)
Samples	11: 3 (samples/pixel)

For more information on working with assets, see the **Assets** topic within this guide.

Classifications

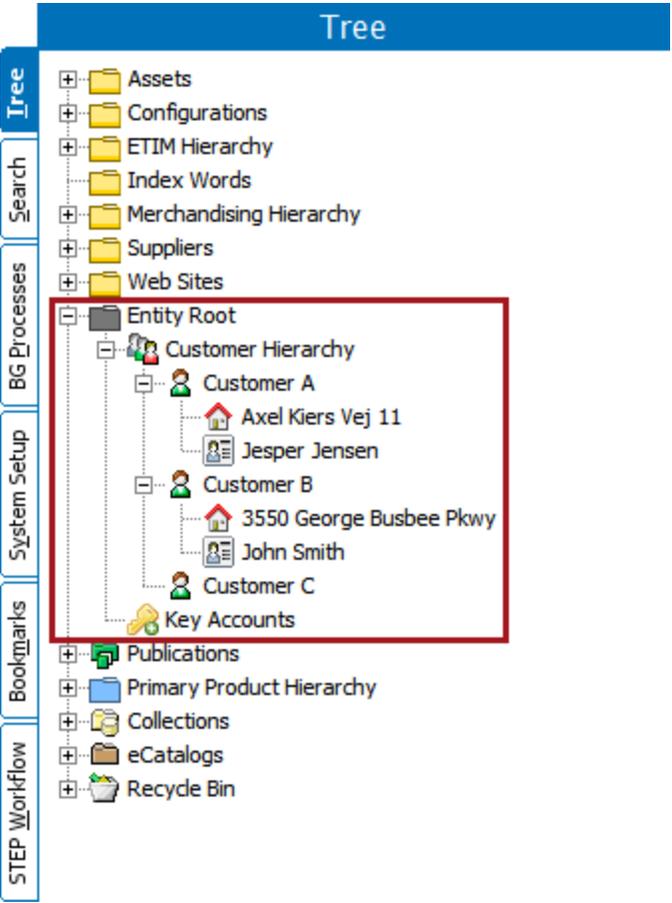
The Classification super type is used to build hierarchies and objects that bundle other objects into organized groupings. These are represented by default with yellow folders in STEP, though these icons may be updated by an admin user. For example, images, manuals, and icons could be uploaded to STEP as assets and stored in appropriate subfolders under the 'Assets' classification folder. Product objects could also be linked into classifications to provide alternative categorizations of objects that vary from the product hierarchy structure.



For more information on working with classifications, see the **Classifications** topic in this guide.

Entities

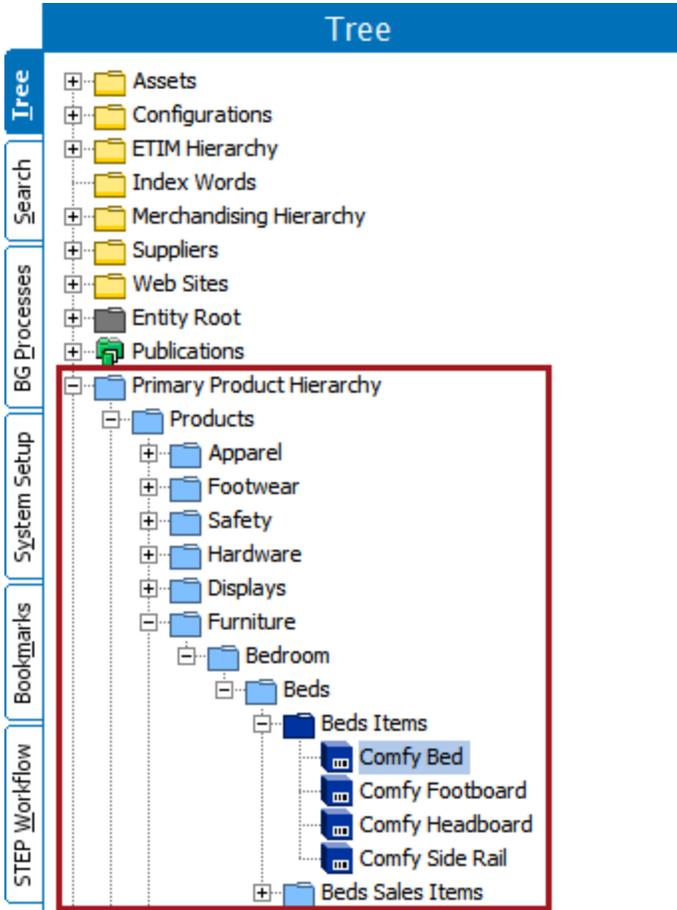
The Entity super type is used to create hierarchies and objects that do not require inheritance of data through categorized groupings. Entities are commonly used to store customer, location, or person data, as well as to store reference data. In addition, entities are used to store source data for golden records. Entities are represented by gray folders and white and gray cubes by default, but these can be updated by an admin user, as is evident in the screenshot below.



For more information on working with entities, see the **Entities** section of this guide.

Products

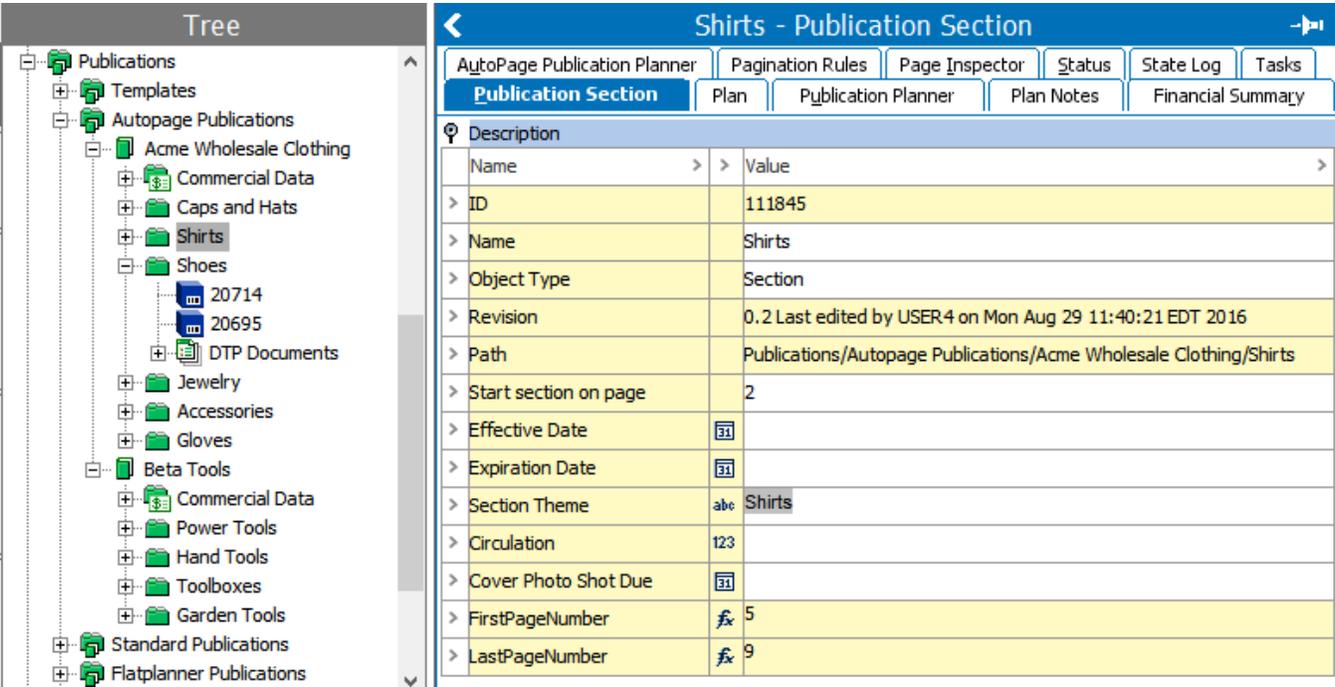
The Product super type is used to create hierarchies and objects that use inheritance of data for objects categorized by similar characteristics. In STEP, products are represented by default with blue icons either as folders or nodes, though these icons can be updated by an admin user. Upper nodes in a product hierarchy are often categories and subcategories, with leaf nodes being actual objects. Whether an organizational folder, sellable object, or something else, each node in the hierarchy is of the product super type, and all child objects are able to inherit attributes and values from parental objects.



For more information on working with products, see the **Products** section of this guide.

Publications

The Publication super type is used to create hierarchies and objects used for print publishing solutions, including STEP'n'design, Flatplanner, and AutoPage. Publication objects are used to create templates used in print solutions, as well as publications such as catalogs or pamphlets. Product objects can be linked into publication hierarchies, meaning data from the product(s) will be reflected in the publication. Publication objects use green icons by default, though these can be updated by an admin user.

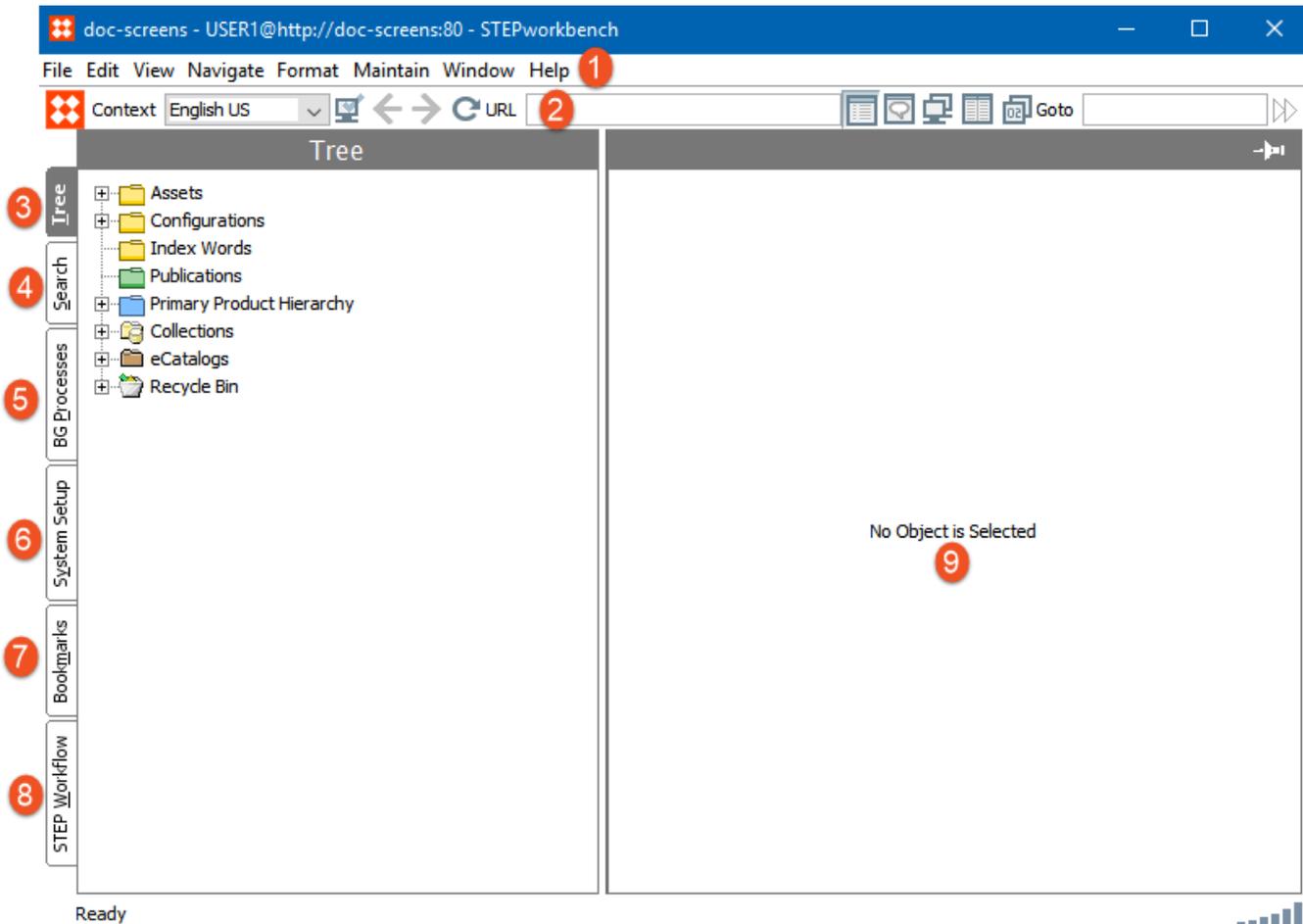


For more information on working with publications, see the **Publications** section of this guide.

STEP Workbench UI

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

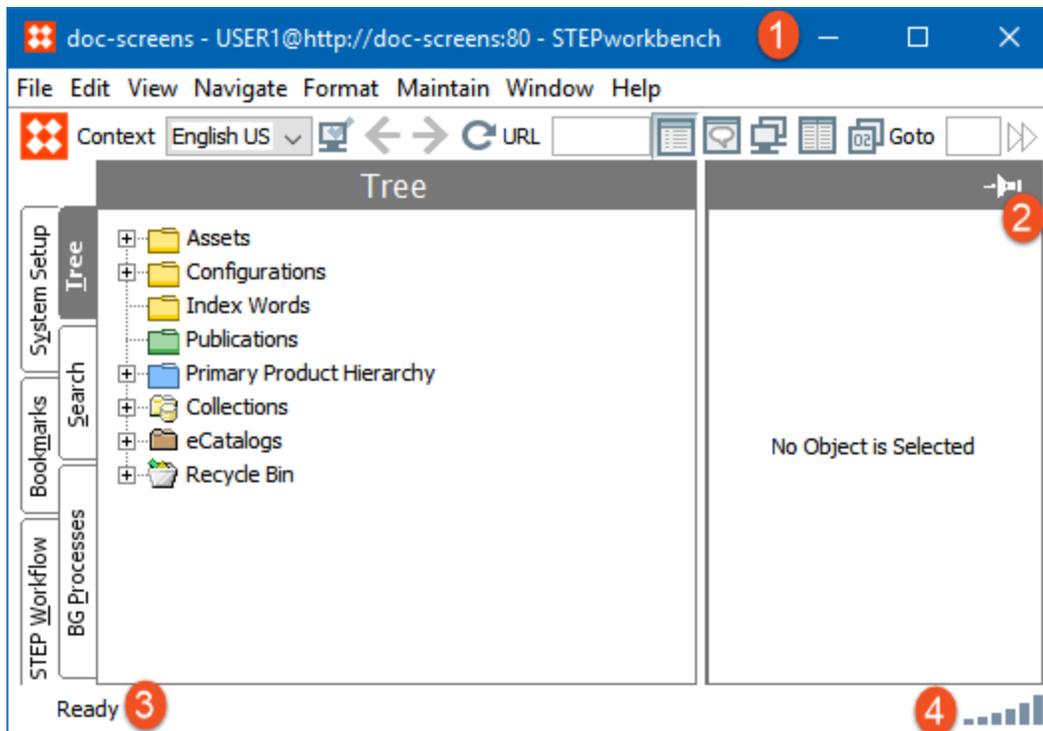
Main Window - Basic Elements



1. [Menu Items](#)
2. [Toolbar](#)
3. [Tree Tab](#)
4. [Search Tab](#)
5. [Background Processes Tab](#)
6. [System Setup Tab](#)
7. [Bookmarks Tab](#)
8. [STEP Workflow Tab](#)
9. [Object Editor](#)

Main Window - Other Elements

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



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

Background Processes Tab

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

The screenshot displays the 'BG Processes' window. On the left, a tree view shows 'Translation' processes, with 'Active Processes' expanded to show a list of items. One item, '100703, en-US > German, Tue Jul 05 13:53:00 +0530 2016', is highlighted. On the right, the 'Background Process' details for this item are shown, including a 'Properties' table and an 'Execution Report'.

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

Execution Report

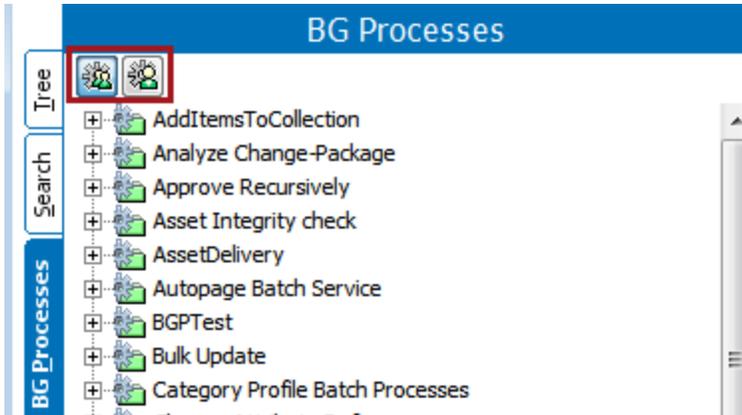
- Analyse
- Logged on
- Analyzing translation request
- Analysis selected 1 out of 1 nodes for translation
- Leaving query service
- Root node was specified. Will wait for user to accept analysis result
- Parsed translation configuration
- Logged on
- Updating translation status
- 1 nodes will be exported for translation
- Registering pending translation file '100703-100703.xlsx'
- Xml for translation: [exceltranslation_BGP_180963.zip](#)
- Translation Export Completed
- Export failed with exception: Optimistic locking errors were detected when flushing to the data s
- Caught OptimisticVerificationException at Tue Jul 05 04:23:17 EDT 2016: Optimistic locking en

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

1. Approve recursively
2. Bulk Update
3. Create Collection
4. Download Report
5. Export Manager Pipeline
6. Import Manager Pipeline
7. Purge Revisions
8. Revive Recursively
9. Translation
10. Translation Import

Background Process View Options

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



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

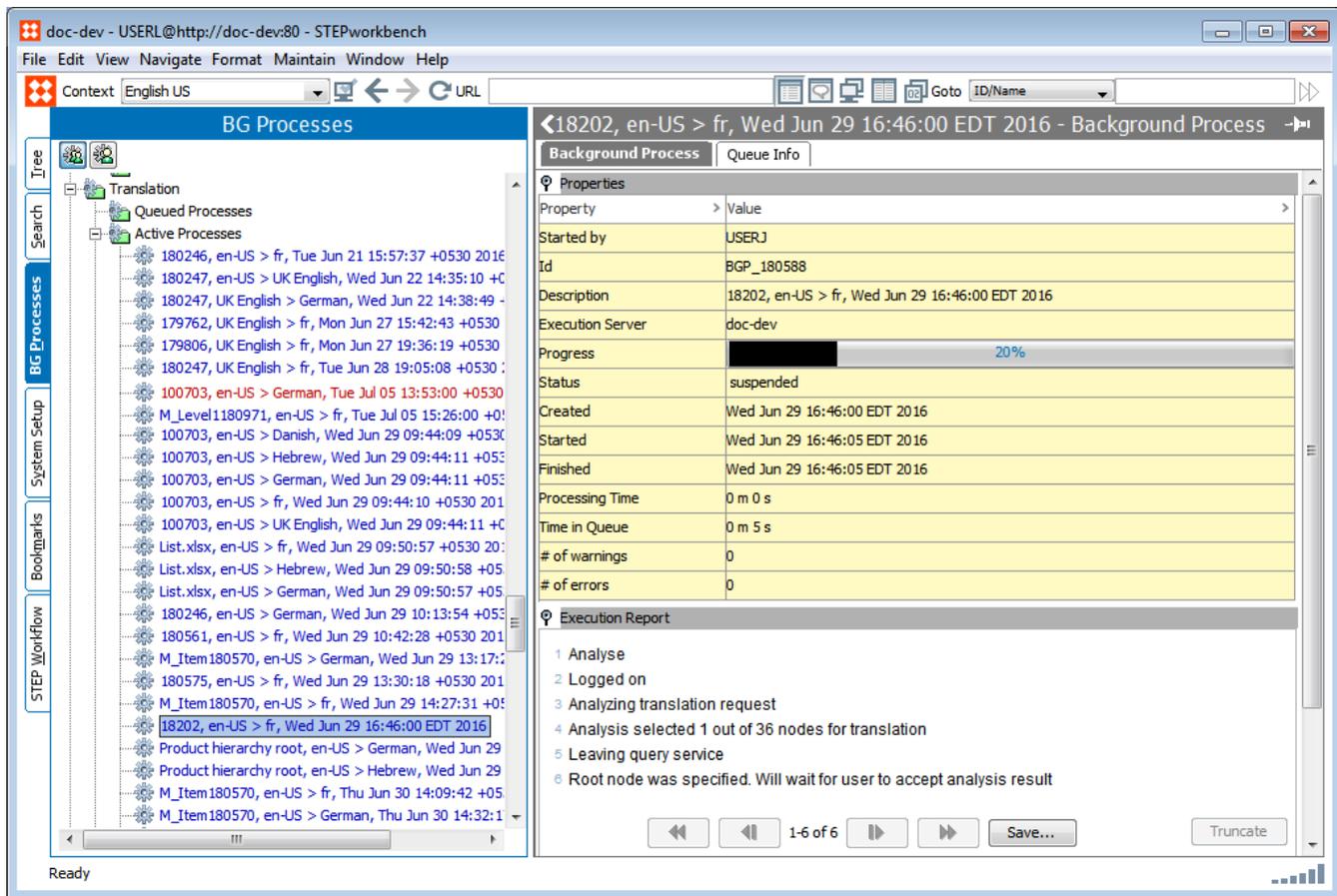
Two Men and Gear: This icon, , will display the background process run by all users of the STEP system. To have this privilege available, the 'View Background Processes of Other Users' setup action must be added for the users who need access to this feature.

Background Process States

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

Active Process

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



Queued Process

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

Completed with Errors

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

Ended Process

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

BG Processes

- Active Processes
- Ended Processes
- Unique Key Processes
 - Queued Processes
 - Active Processes
 - Ended Processes
 - Activating: Key 4
 - Deactivating: Key 4
- Unlink Object Type
 - Queued Processes
 - Active Processes
 - Ended Processes
- Update actual page from plan
 - Queued Processes
 - Active Processes
 - Ended Processes
- UploadDTPDocument
 - Queued Processes
 - Active Processes
 - Ended Processes
- Web UI Asset Pipeline Download
 - Queued Processes

Activating: Key 4 - Background Process

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

Execution Report

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

Bookmarks Tab

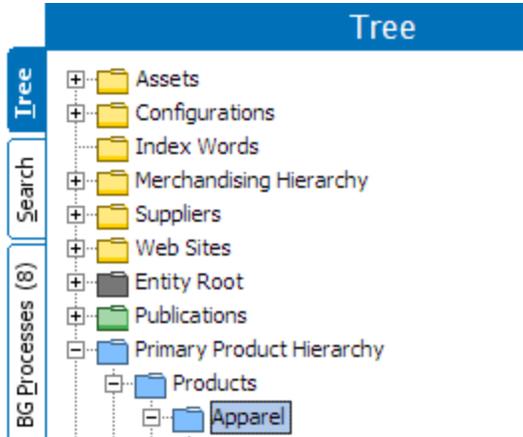
The Bookmarks tab allows users to set bookmarks for any objects in the Tree, and allows users to easily access these objects without having to search or navigate the Tree.

Bookmarks

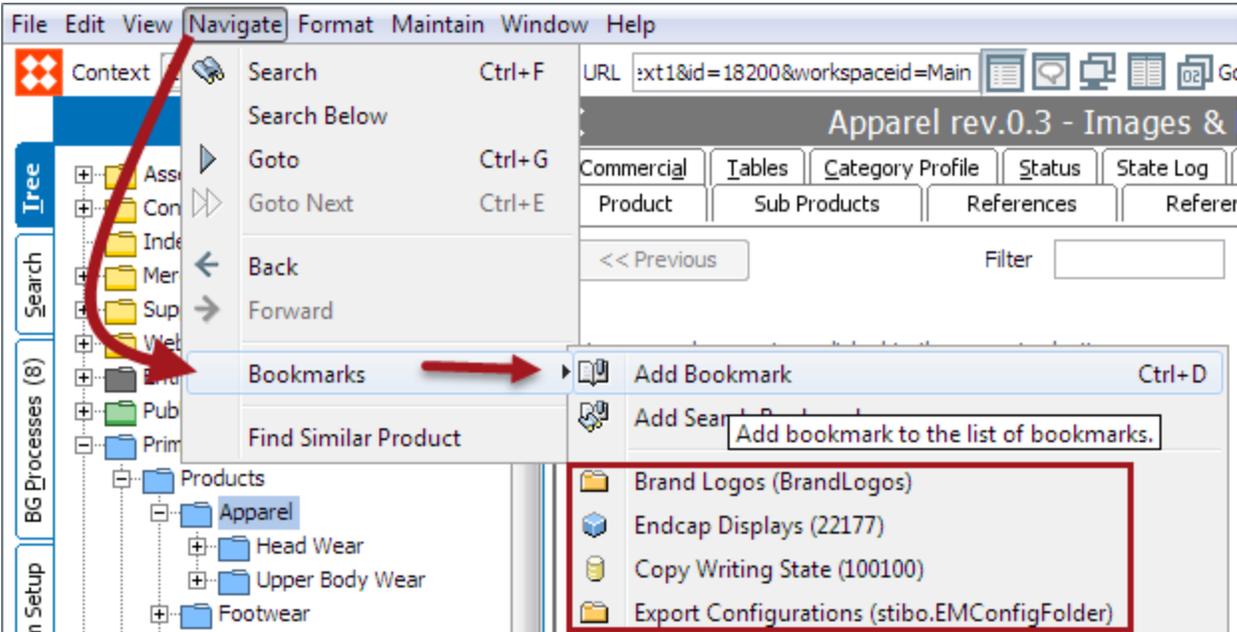
- Brand Logos (BrandLogos)
- Endcap Displays (22177)
- Copy Writing State (100100)
- Export Configurations (stibo.EMConfigFolder)

Adding a Bookmark

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



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



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

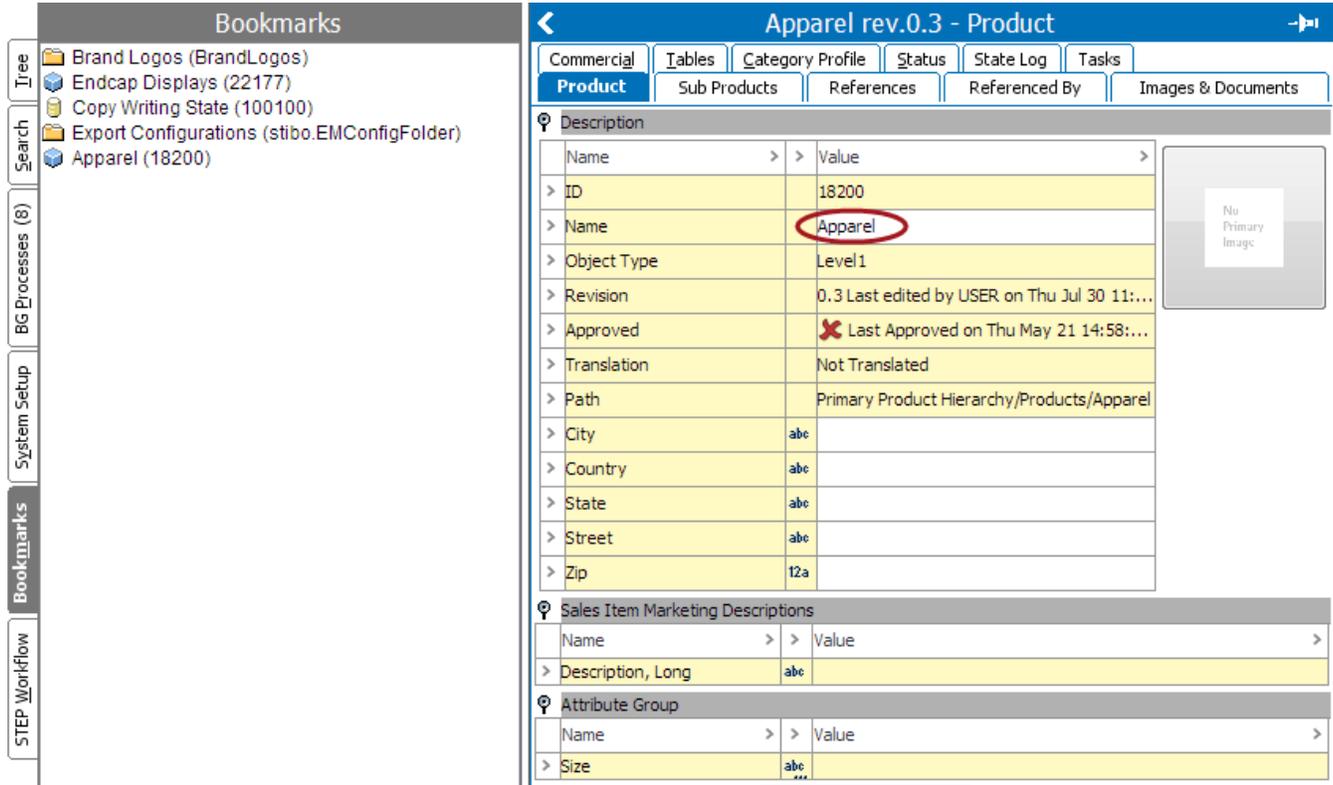
3. Your new bookmark is displayed on the Bookmarks tab



4. Click the new bookmark

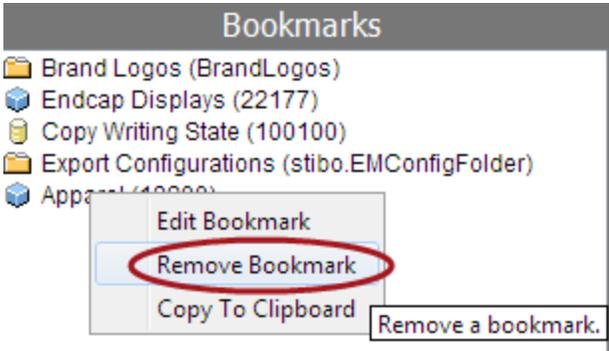


5. The bookmarked data is displayed on the Bookmarks page

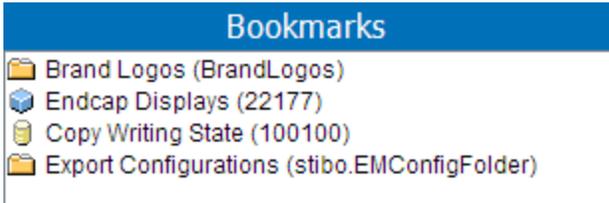


Removing a Bookmark

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

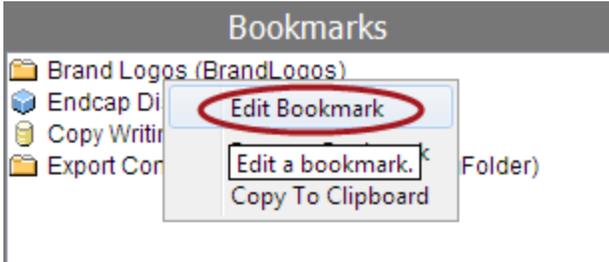


2. The selected bookmark is removed.

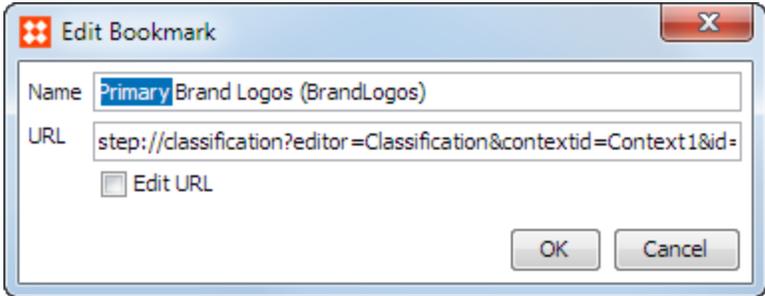


Editing a Bookmark

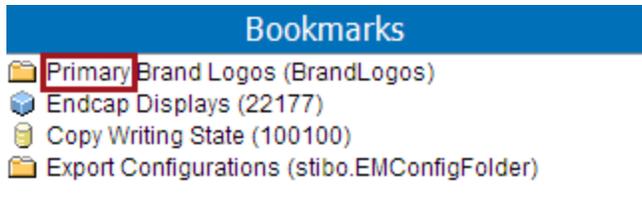
1. On the Bookmarks tab, right-click the bookmark to be modified and click Edit Bookmark.



2. Modify the name or URL of the bookmark

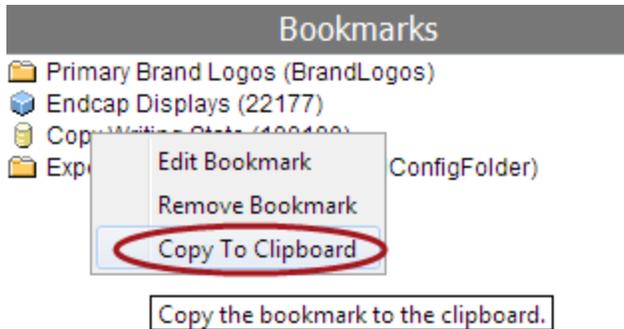


3. The name is updated on the Bookmarks tab

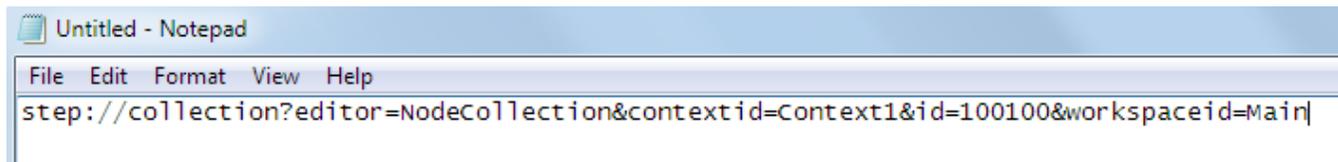


Copying a Bookmark to the Clipboard

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



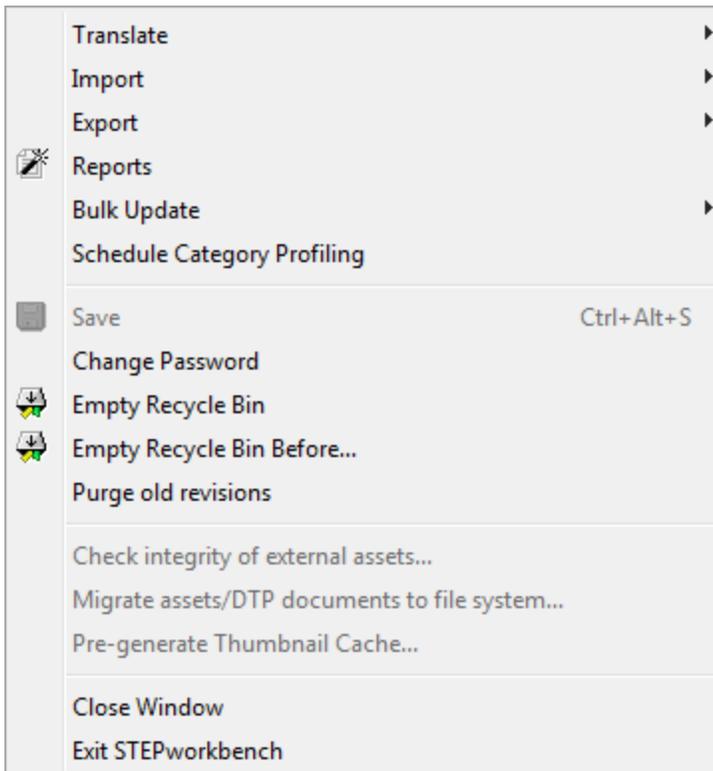
2. Use Ctrl-V to paste the copied URL of the bookmark.



Menu Items

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

File Menu



Translate

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

Import / Export

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

Reports

Launches the Standard Reports and any custom data reports.

Bulk Update

Allows the user to launch or schedule a Bulk Update.

Schedule Category Profiling

Launches the Schedule Category Profiling dialog.

Save

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

Change Password

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

Empty Recycle Bin

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

Empty Recycle Bin Before

Contents before a specified date are deleted from here.

Purge Old Revisions

This is a global purge of revisions contained within a specified workspace. A further description of this functionality is available in the Managing Revisions in STEP section of the System Setup / Superuser documentation.

Check integrity of external assets...

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

Migrate assets to file system...

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

Close Window

This option closes the active window.

Exit STEPworkbench

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

Edit Menu

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

Undo

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

Redo

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

Cut

Standard 'cut' operation.

Copy

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

Paste

Standard 'paste' operation.

Paste Link

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

Select All

Standard 'select all' operation.

Spelling

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

Asset

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

Edit Unique Key Values

Edit the key values of the currently selected object.

Remove Row(s)

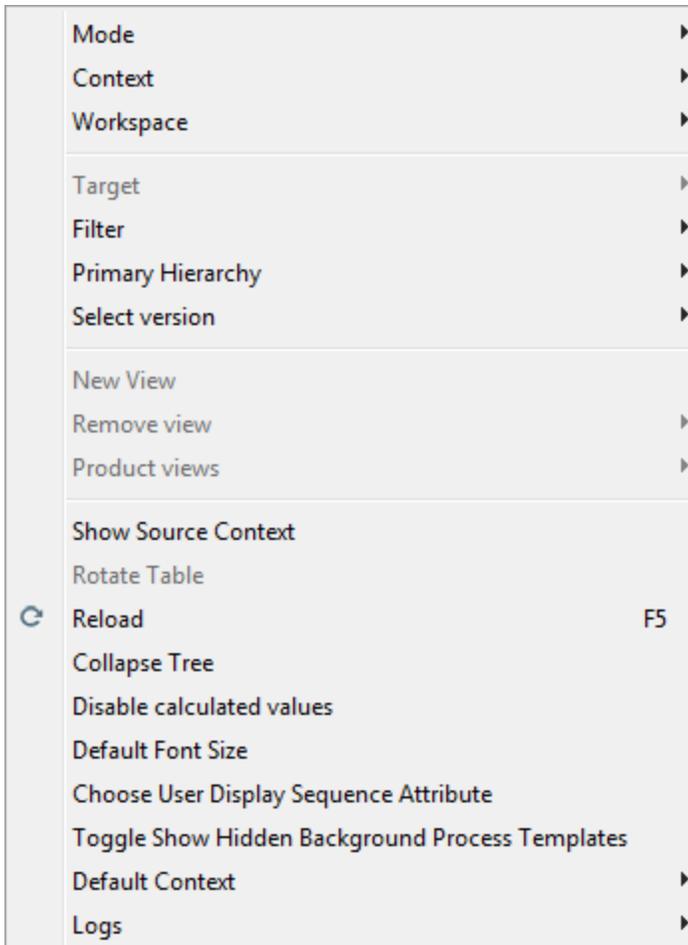
Removes a selected row, e.g. an attribute linked to a product. Keyboard Shortcut = Ctrl + '-'.

Insert Row

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

View Menu

The View Menu's purpose is to change the way a user views the STEP system. In this menu, users may change the workspace, context, and mode, add a filter, change the primary hierarchy, and other options to customize the view to their needs.



Mode

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

Context

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

Workspace

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

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

Target

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

Filter

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

Primary Hierarchy

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

Select Version

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

New View

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

Remove View

Removes an unwanted / unneeded view.

Product Views

Shows the products that are selected.

Show Source Context

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

Rotate Table

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

Reload

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

Collapse Tree

Collapses the folders in the Tree navigator.

Disable calculated values

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

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



Default Font Size

Allows the user to change GUI font.

Choose User Display Sequence Attribute

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

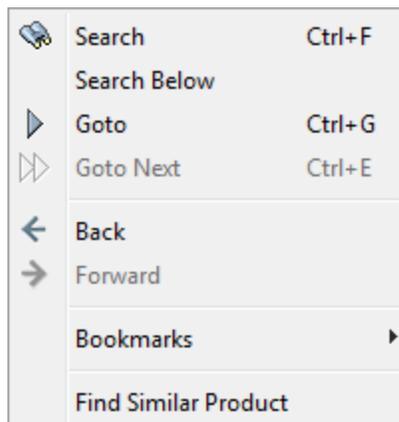
Default Context

Sets the default context used when logging in.

Logs

Displays Workspace and System Setup logs.

Navigate Menu



Search

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

Search Below

Performs a search within a selected hierarchy.

Goto

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

Goto Next

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

Back / Forward

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

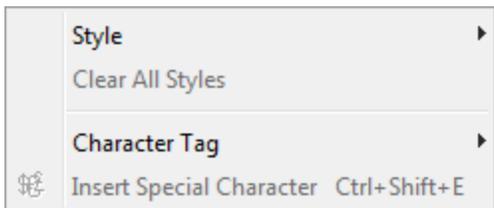
Bookmarks

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

Find Similar Product

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

Format Menu



Style

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

Clear All Styles

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

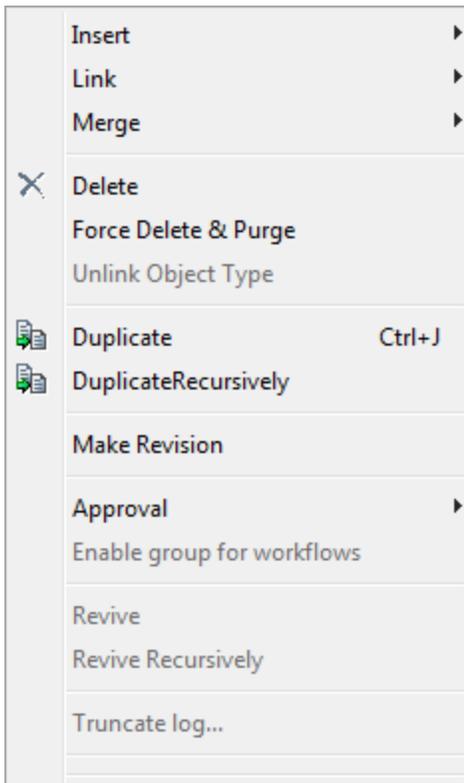
Character Tag

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

Insert Special Character

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

Maintain Menu



Insert

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

Link

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

Merge

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

Delete

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

Force Delete and Purge

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

Unlink Object Type

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

Duplicate

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

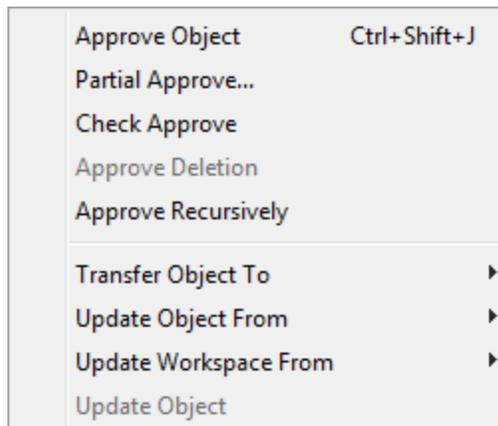
Duplicate Recursively

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

Make Revision

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

Approval



Approve Object

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

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

Partial Approval

Approve selected parts of the unapproved changes on selected object.

Check Approve

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

Approve Deletion

Deletes the object from the Approved workspace.

Approve Recursively

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

Transfer Object To

Takes selected object and moves it into the chosen workspace.

Update Object From

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

Update Workspace From

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

Update Object

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

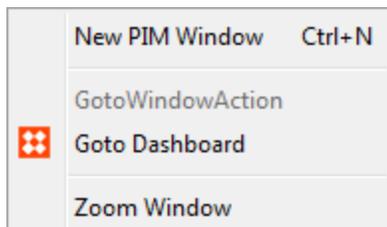
Revive

Revives a deleted object.

Revive Recursively

Revives a deleted object recursively.

Window Menu



New PIM Window

Allows the user to launch another session.

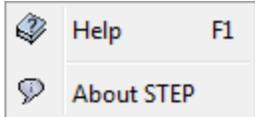
Goto Dashboard

Brings the user to the dashboard.

Zoom Window

Maximizes the selected window.

Help Menu



Help

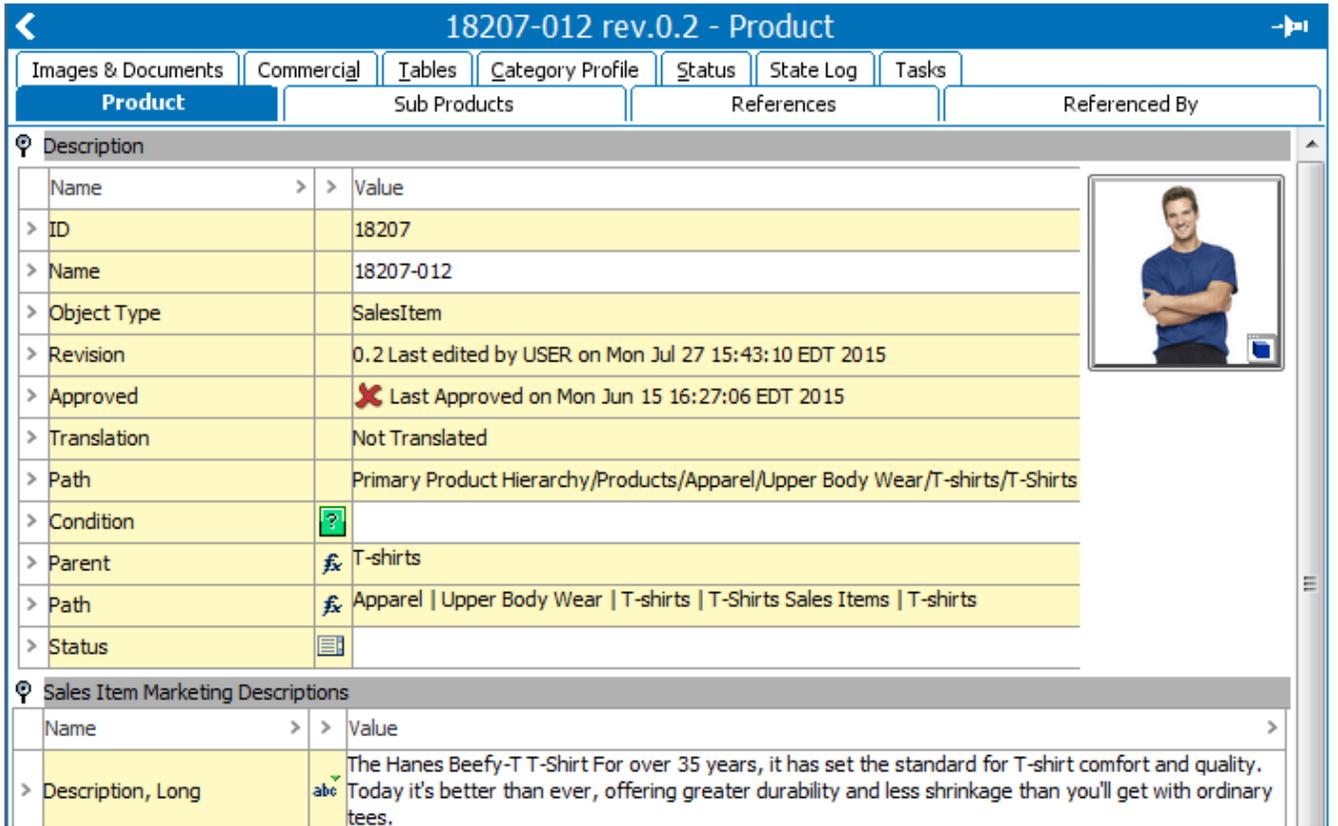
Brings the user to the online help documentation.

About STEP

Displays the workbench introductory window.

Object Editor

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

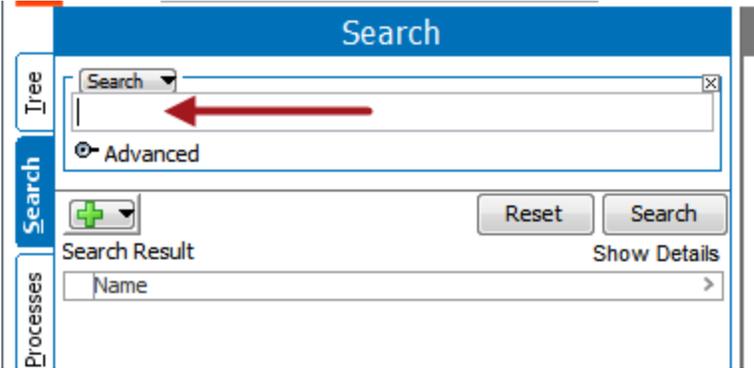


See the **Object Maintenance in Tree** topic within this guide and child topics for additional information on the various object editors available in Tree.

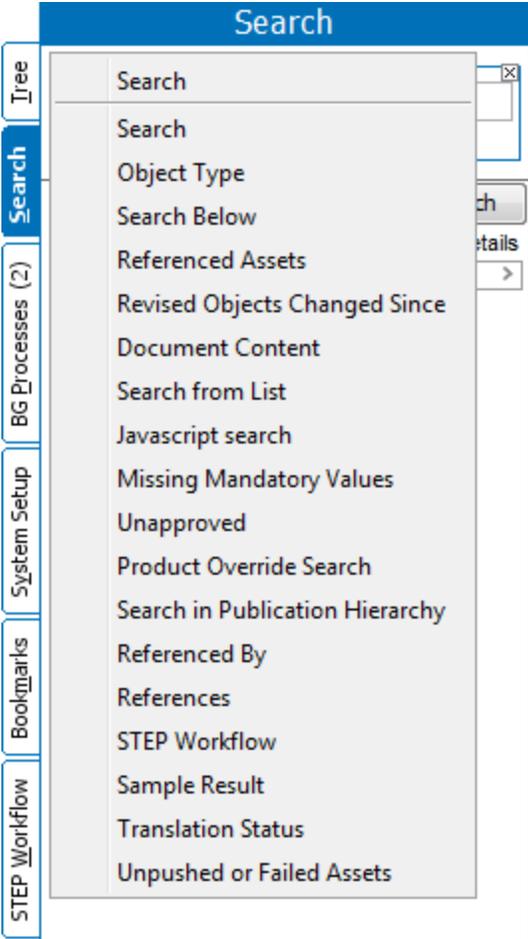
Information on editing non-Tree objects can be found within the relevant sections throughout the STEP documentation (e.g. information on workflow editors is available within the Workflows guide).

Search Tab

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



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

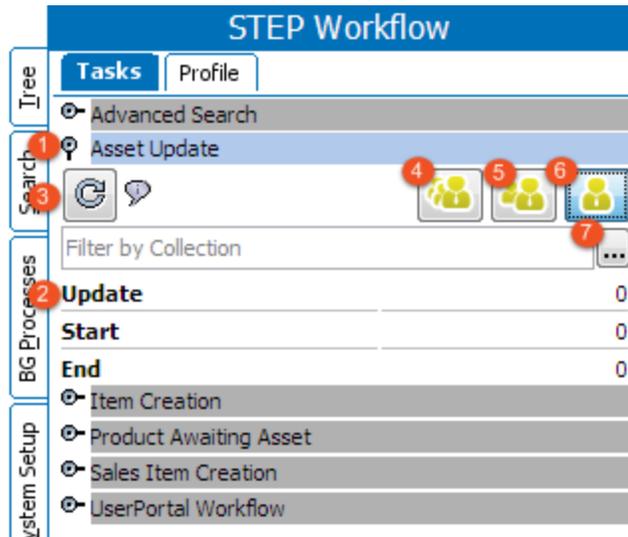


For more on Searching, see the Search Overview section of the STEP User Guide / Getting Started documentation).

STEP Workflow Tab

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

Tasks



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

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

Profile

STEP Workflow profile

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

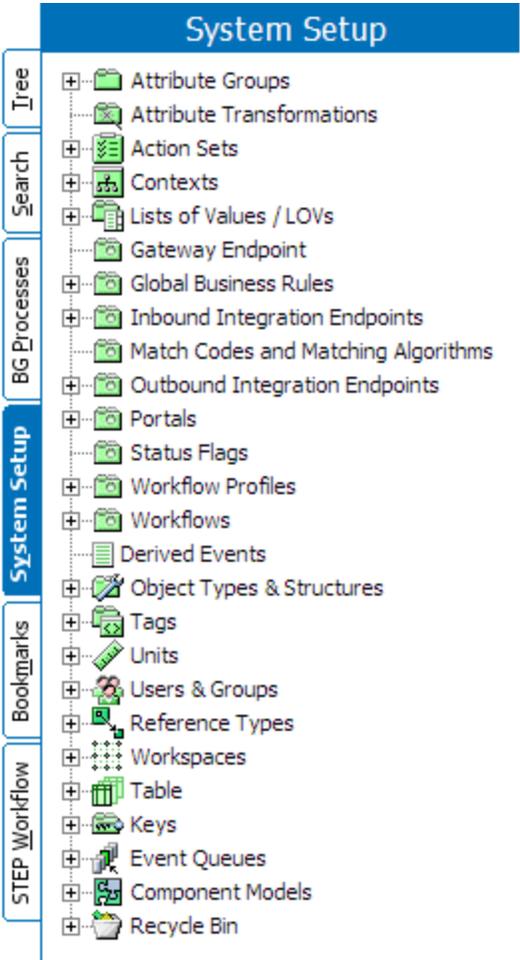
2 Edit configuration 3 Update on-demand data 4 Copy to Clipboard

State	STEP Workflow	Items in State	Average time in State
> Copy Writing	SalesItemCreation	11	81 Days
> Copy Writing Cluster	SalesItemCreationNewBR	4	123 Days
> Copy Writing Cluster	SalesItemCreation	11	81 Days
> Copy Writing Ended 5	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreationNewBR	4	123 Days
> Digital Asset Cluster	SalesItemCreation	11	81 Days
> Digital Asset Review	SalesItemCreationNewBR	4	123 Days
> Digital Asset Review	SalesItemCreation	11	81 Days

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

System Setup Tab

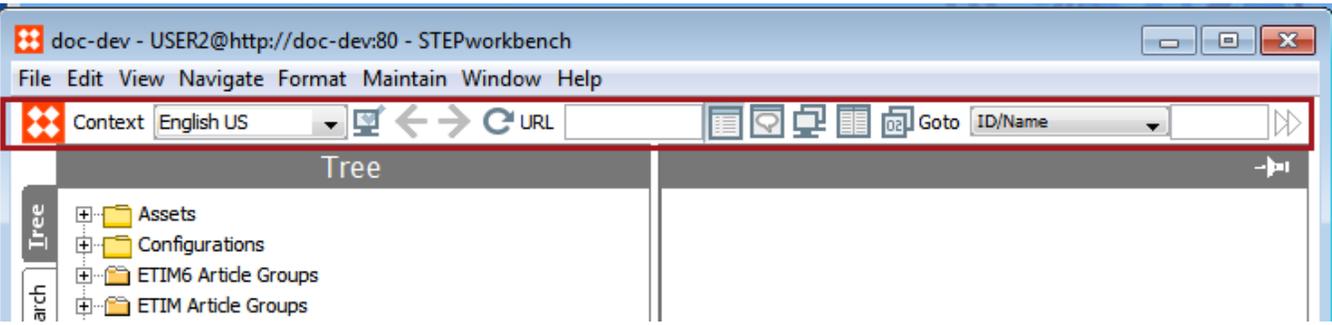
Schema objects are maintained from the System Setup tab. Examples of such objects are Attributes, Action Sets, Contexts, LOVs, Object Types, Tags, Units, Users & Groups, Workspaces, and Reference Types. Most actions performed here require Super User access.



Additional information on the System Setup objects and functions can be found throughout the online help. For example, information on Workflows is available in the Workflows guide, while information on integration endpoints is available within the Data Exchange guide. Information for general functions that are not covered in independent guides (e.g. attributes, references, users and groups) can be found in the System Setup / Superuser Guide.

Toolbar

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



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

Stibo Systems Logo



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

Context List

Context

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

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

Workspace Toggle Icon

Located to the right of 'Context', the Workspace Toggle button, , switches the user's view of a given object between the 'Main' and 'Approved' workspaces. In the 'Main' workspace, object information is editable. In the 'Approved' workspace, the user will see only those values that have been approved, and may not edit them. For more information on workspaces, see the **Workspaces** topic in the **System Setup / Super User** documentation.

Navigation Icons



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

Address Field

URL

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

Viewing mode icons



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

Normal mode



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

Translation mode



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

Workspace mode



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

Context mode



With this view enabled users can view all of an object's data for two or more available contexts in a comparison display format. The number of contexts viewable at one time is configurable. For more information regarding contexts see the Contexts topic in the System Setup / Superuser documentation.

Revision mode



With this mode selected, users can view the current state of an object's data as well as all previous revisions in a comparison display format. The number of revisions viewable at one time is configurable, but the current and previous versions are shown as the default. For more information on revisions, see the Managing Revisions in STEP topic in the **System Setup / Super User** documentation.

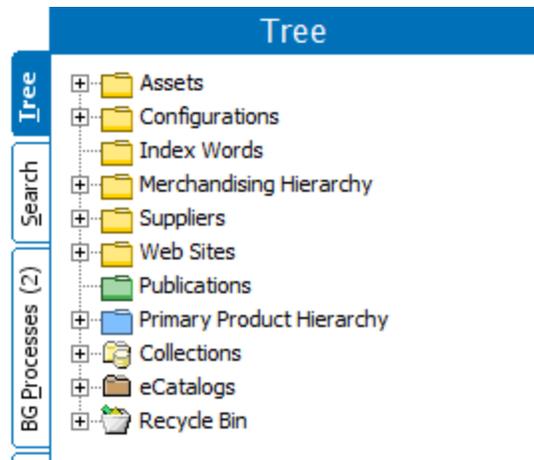
Goto field

Goto

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

Tree Tab

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



The above hierarchies and their child objects can be navigated, edited, created, and deleted from the Tree.

For further information about objects in the Tree and how to work with them, see the **Basic STEP Concepts** and **Object Maintenance in Tree** topics within this guide.

Object Maintenance in Tree

Regardless of the particular object type or hierarchy that you are working with, the general principles of maintaining objects in the workbench are the same, and are described in the **All Objects** section of this guide. This includes general information on creating, editing, approving, and deleting objects.

Note: The **All Objects** information should be read and understood prior to focusing on any of the object type specific information (links below), as the basic information that is common to all object types is not repeated in the type-specific sections.

Beyond the general object maintenance topics, additional information on working with specific object types in Tree, including details about the various editors and functionalities available on them can be found in the subsequent topics in this guide:

- Assets
- Classifications
- Collections

- Entities
- Products
- Publications
- Recycle Bin

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information in this guide focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

A variety of components are also available for maintaining objects in Web UI. For more information, see the **Web User Interfaces** documentation. Additionally, objects are often created or maintained within workflows, or via imports, integration endpoints, bulk updates, etc. These types of object maintenance are outside the scope of this material, but additional information is available in the relevant guides throughout the STEP online help.

All Objects

This section covers the basic functionality of creating, editing, and deleting objects in the Tree, as well as providing an overview of the commonalities between the various object editors. Regardless of the particular object type or hierarchy that you are working with, the general principles of creating and maintaining objects are the same.

It is helpful if the **Basic STEP Concepts** topic in this guide has been read and understood prior to reading this material.

A variety of components are available for creating and maintaining objects in Web UI. For more information, see the **Web User Interfaces** documentation. Additionally, objects are often created or maintained within workflows, or via imports, integration endpoints, bulk updates, etc. These types of object maintenance are outside the scope of this material, but additional information is available in the relevant guides throughout the STEP online help.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values.

The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

See the relevant section(s) below for detailed information on working with objects in the workbench:

- Approval of Objects
- Creating Objects in Tree
- Deleting Objects in Tree
- Editing Objects in Tree

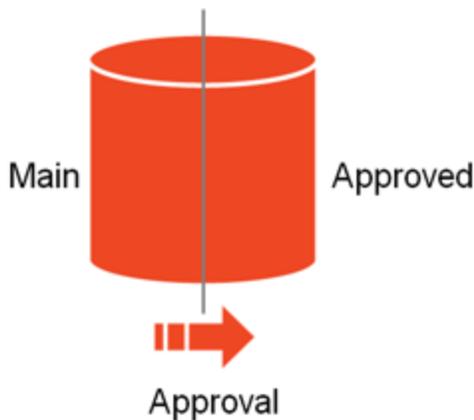
Approval of Objects

This section introduces the user to the concept of approvals in STEP, and provides detailed information on how to carry out approvals in the STEP Workbench. Approval of objects in the Web UI is handled via addition of an Approve action button to a screen.

Approval Overview

The data in STEP is logically divided into two workspaces named Main and Approved.

The Main Workspace is the editable "draft" Workspace where data is initially born and enriched. The Approved workspace, on the other hand, holds approved data deemed ready for production.



In a typical STEP setup, data from the Approved workspace is made available to downstream systems. Data cannot be edited directly in the Approved workspace. Instead, data is reflected in the workspace via an operation called approval.

Approvals can be carried out manually by a user, or programmatically by a business rule, import process, or other operation.

The approval operation only applies to objects that are workspace revisable. These are:

- Product objects
- Classification objects
- Asset objects
- Entity objects configured to be workspace revisable

All other objects in STEP (like attributes, references, etc.) will be identical in the Main and Approved Workspaces and changes made to these will be reflected automatically in both workspaces. These objects are known as being 'Globally revisable'.

Detailed information on how to carry out approvals in the STEP Workbench can be found in the **Approving an Object** topic in this guide. This guide also contains a detailed description of the approval symbols that are visible in the different object editors in the **Approval Symbols** topic.

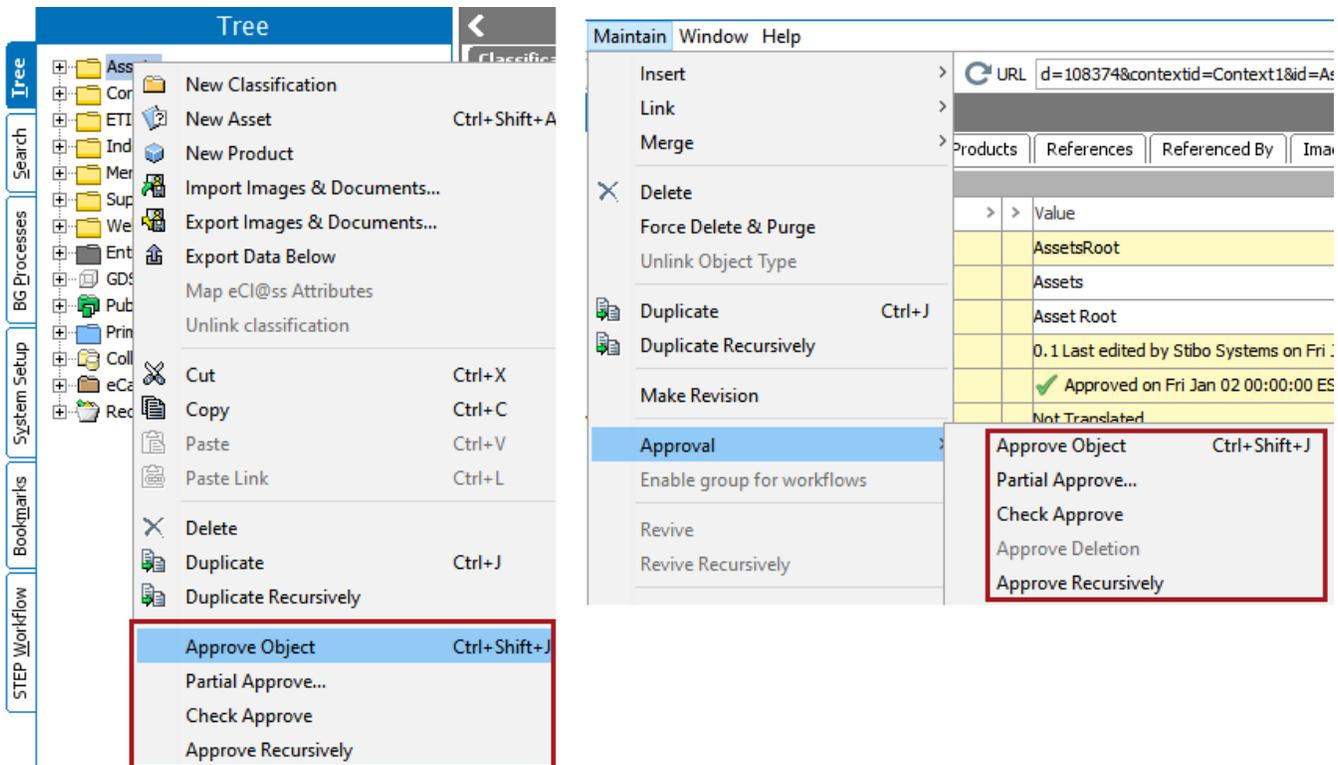
Note: All actions in STEP are controlled via privileges. Some users may not have access to approve objects, or may only have options to approve specific object types, hierarchies, or attribute values. The information in the

subsequent topics assumes that all required privileges are available to carry out the described actions. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

Approving an Object

This topic describes how to approve an object in the workbench.

Approving objects is done by right-clicking on the object and selecting one of the available approval options, or from the Maintain menu.



Note: If 'approval' is a Task within a Workflow, then Objects can alternately be approved from the Task view. See **Working with Tasks in Workflows** in the **Workflows** documentation.

Approve Objects is available when the Main workspace is selected.

Approving objects is available for:

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

The status of an object in the various workspaces can be viewed in the Status tab in the Workspaces field of the relevant editor.

Once object editing is complete, and the object is ready for publishing, approving the object copies the current object values into the Approved workspace.

Note that:

- Objects must be approved from the Main workspace.
- An object cannot be approved if parent objects are not yet approved (approving must be done from the top and downwards in the hierarchy).
- To easily check differences in the Main and Approved Workspaces, select **Partial Approve**, as discussed below.
- When approving, the objects revision number changes automatically.
- An entire hierarchy can be approved using the **Approve Recursively** option. For more information, see **Approving Recursively** below.
- The user must have sufficient approve privileges.

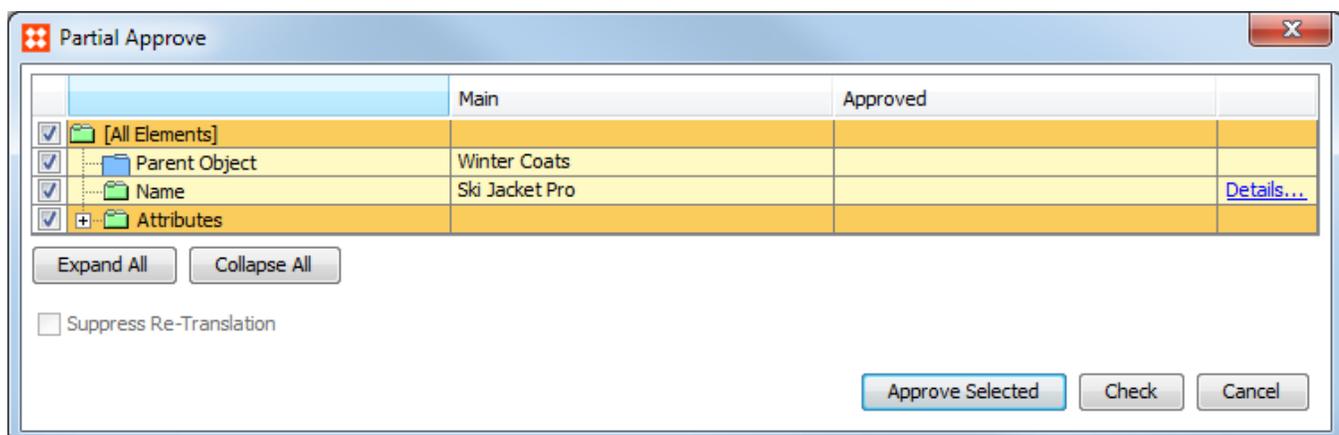
Partial Approve

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

To partially approve an object in the Main Workspace:

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

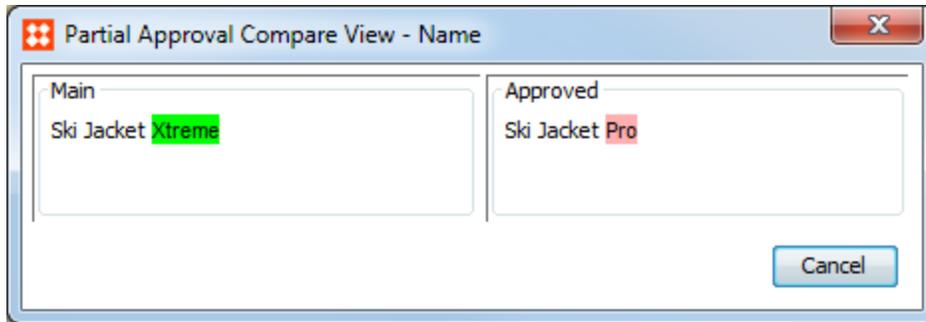
This will bring up the Partial Approve dialog box:



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

Besides Name, Parent Object, and Default DTP Template, the type of elements listed are attributes, references, and tables. For each element the values in Main and Approved Workspaces are listed.

For detailed information about the value for an element, click the **Details...** link. This displays a detailed view of the element showing the values for the Main and Approved workspace:



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

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

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

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

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

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

Suppress Re-translation

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

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

Check Approve

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

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

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

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

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



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

Approving Recursively

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

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

Approving Recursively is available for:

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

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

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

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

To recursively approve in the 'Main' Workspace:

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

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

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

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

A dialog box appears displaying information on the process.

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

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

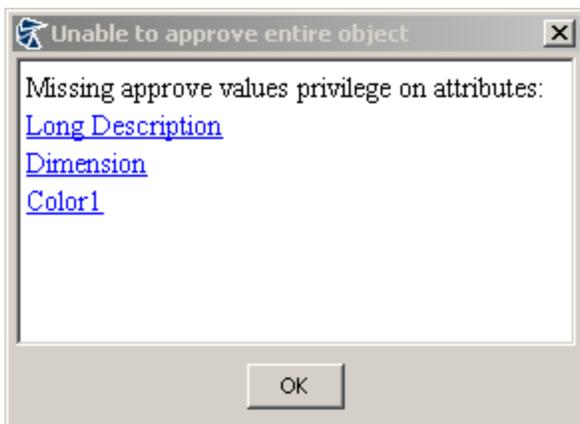
The hierarchy will now have Approved status indicating that it is copied in the **Approved** Workspace.

Approval Feedback

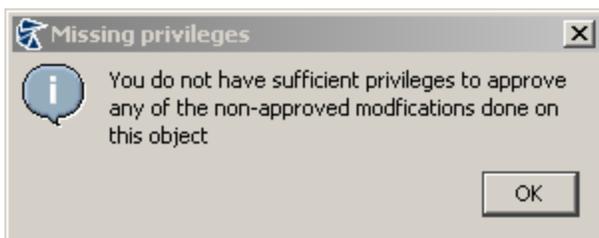
Depending on your **Approve** Privileges, you might get different types of warnings, when clicking **Approve Object** or **Partial Approve**.

Approve Object Feedback

If you have modified attribute values for which you have **Approve Privileges**, and at the same time you have modified attribute values for which you do *not* have **Approve Privileges**, an **Unable to approve entire object** dialog appears.

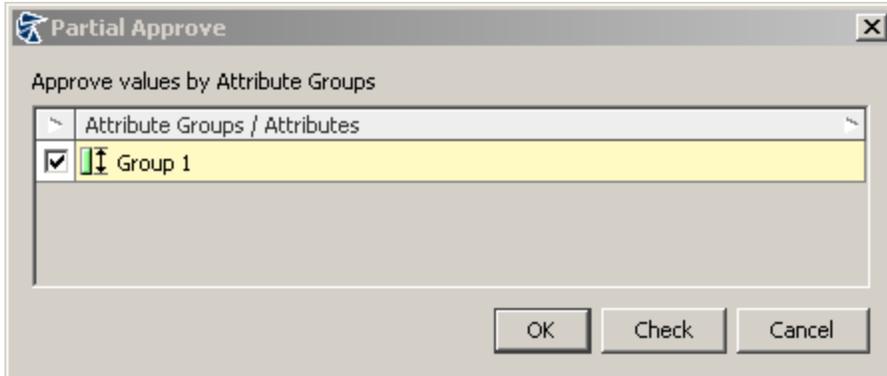


If you have modified attributes values, for which you do *not* have **Approve Privileges**, a **Missing privileges** dialog appears.



Partial Approve Feedback

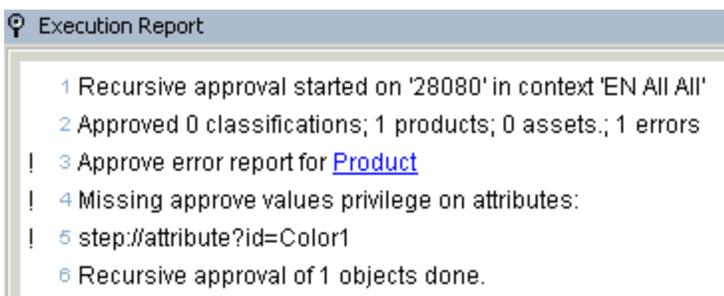
If you have modified attribute values for which you have **Approve Privileges**, and at the same time you have modified attribute values for which you do *not* have **Approve Privileges**, a **Partial Approve** dialogue box appears.



In the example above, the user will be able to approve all attribute values in Attribute Group **Group 1**.

Approve Recursively Feedback

1. In [Background Processes], click **Approve Recursively**, unfold **Active** or **Ended** Processes, click the relevant process.
2. In the **Background Process** tab, unfold **Execution Report**.



Approval Symbols

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

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

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

An Object can contain revised data or not revised data.

Not revised Objects are:

- Externally maintained Attributes
- Commercial Data

Revised data are:

- Internally maintained Attributes (e.g. Description Attributes and Specification Attributes)
- References between Objects:
 - Product to Image / Document Reference
 - Product to Product Reference
 - Product to Classification
 - Product to Entity
- Classification to Classification
- Classification to Entity
- Image / Document to Entity
- Image / Document to Classification
- Entity to Entity
- Entity to Product
- Entity to Image / Document
- Entity to Classification
- Object names (e.g. Product names, Images & Documents names and Classification names)
- STEP PIM Tables
- Linked Attributes to Product

Note: Only the status of revised data are reflected in the Approved field (see the table below for more information).

The Approved field contains one of three different symbols indicating the Approved status of the current Object.

Approved Symbols	Status	Description
	Unapproved	<p>Revised data on Product, Classification or Images & Documents in current context are not approved.</p> <p>Examples can be:</p> <ul style="list-style-type: none"> • An Object has never been approved. • Revised data (e.g. Attribute Values, References, Object names or tables) have been changed in current context without being approved. <p>Examples of changes to revised data could be:</p> <ul style="list-style-type: none"> • A change in Object name. • A changed value on an internally maintained Attribute. • If an Attribute has been linked to a Product. • If Reference links to Objects have been made. <hr/> <p>Note: When linking a Product to Classification and in case the Classification Object Type owns the Product links, then the Product does not get the Unapproved symbol. For more information, see Online Help - Object Types & Structures.</p> <hr/> <p>Privileges can have an influence on the Approved symbols. See 'Users with Different Privileges' below.</p>
	Approved	<p>Revised data on Product, Classification or Images & Documents are approved in all contexts.</p> <hr/> <p>Note: No data in current context or any contexts are to be approved.</p>
	Partial Approved	<p>The yellow Partial Approved symbol can appear if:</p> <p>Revised data have been approved in current context but a Reference, Object name, or Value need also to be approved for the Object to get approved in all contexts.</p> <p>If you change view to another context, then you typically see that:</p> <ul style="list-style-type: none"> • A dimension dependent Reference is not approved. • A dimension dependent Value is not approved. • A dimension dependent Object name is not approved. <hr/> <p>Note: When all the dimension dependent References, Attribute values and</p>

Approved Symbols	Status	Description
		<p>Object names have been approved, then the symbol will change from yellow Partial Approved symbol to a green Approved symbol.</p> <hr/> <p>Privileges can have an influence on the Approved symbols. See 'Users with Different Privileges' below.</p>

Users with Different Privileges

If two users have different **View** privileges, then they might get two different Approved symbols when looking at an Approved Object.

Example with Attribute can be:

- User 1 has the privileges to see all Attributes
- User 2 has limited privileges and can only see some of the Attributes

If changes are made to the Attributes that only User 1 can see, then User 1 gets the Unapproved symbol, while User 2 only gets the yellow Partial Approved symbol as no changes has been made to the Objects he can see.

If changes are made to Attributes that both User 1 and User 2 have the privileges to see, then both users get the Unapproved symbol.

Creating Objects in Tree

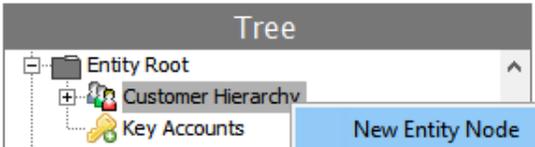
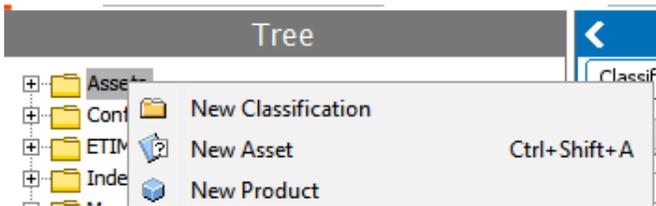
Regardless of the particular object type or hierarchy that you are working with, the general principles of creating objects in the workbench are the same, and are described below.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

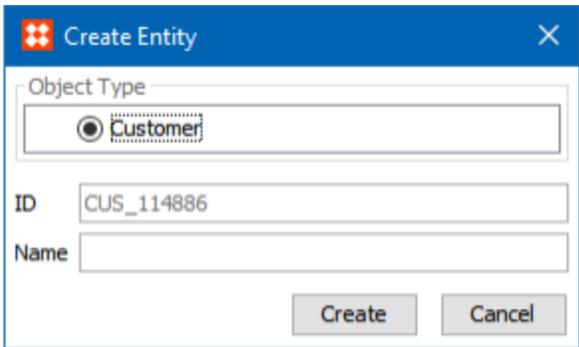
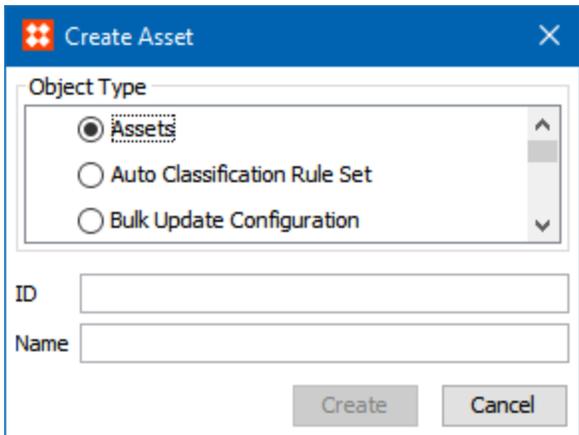
Objects can be manually created in the Tree via right-clicking or using the Maintain menu.

To create a new object via right-click:

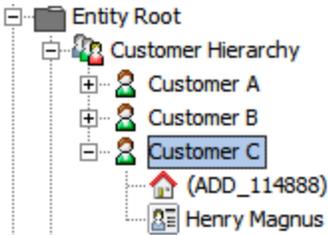
1. Select a parent under which the new object should be created. Note that if the new object should be created as a root node on the Tree tab, the Maintain menu must be used (see below).
2. Right-click on the parent and select the appropriate 'New...' option. The options will vary based on the selected parent. For example, note the differences between the available options on a classification and an entity, as shown below.



3. Selecting the right-click option will open a Create dialog, appropriate for the selected object super type (e.g. Create Assets for assets and Create Entity for entities). The options available in the dialog are based on the data model defined in System Setup. For example, the Object Type selection will vary based on the allowable object types under the selected parent, and ID will only be available for population if the object type being created does not have autogenerated IDs applied.



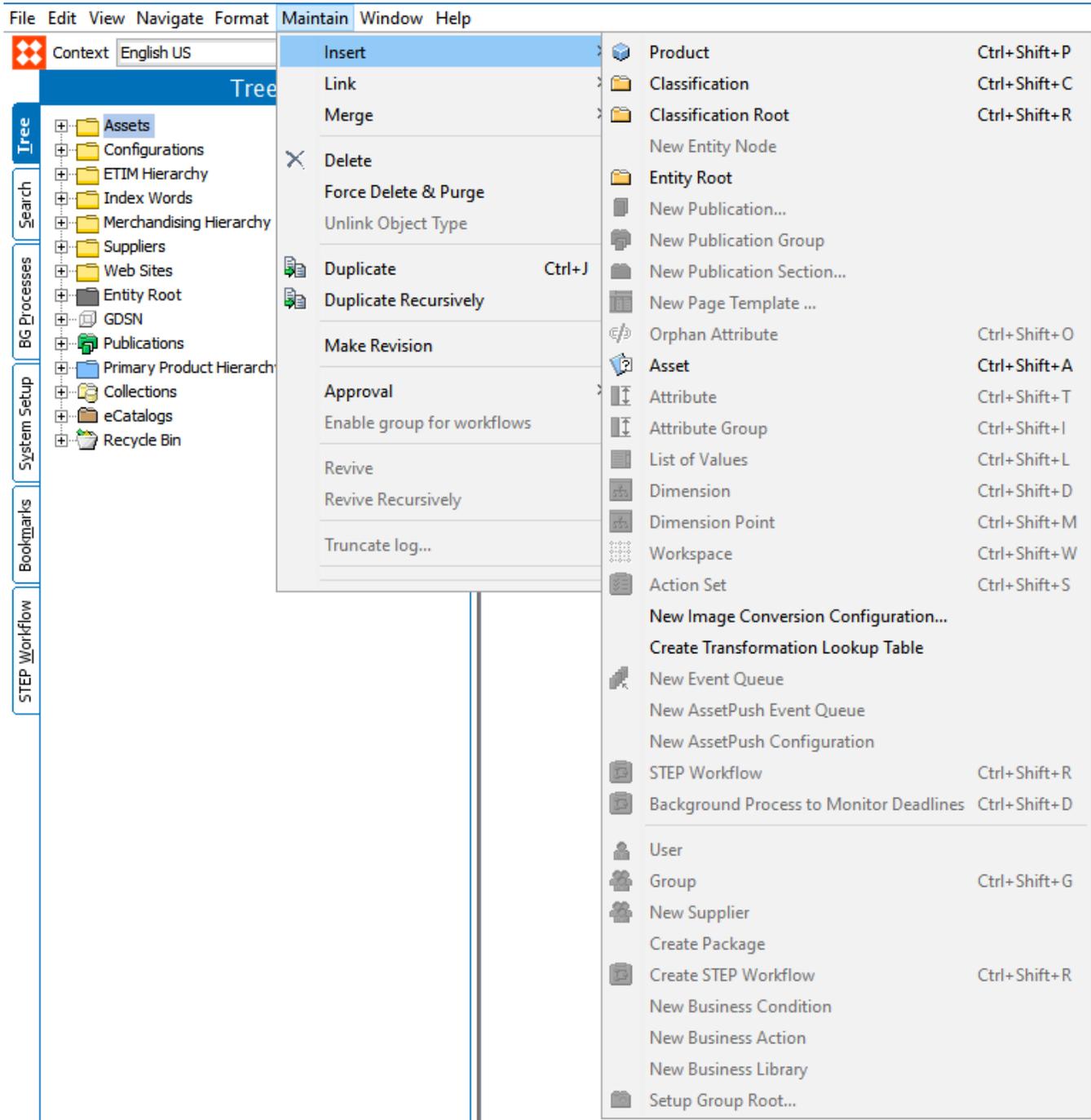
4. When an object type has been selected and an ID applied, the Create button will be enabled. Clicking Create completes the creation of the new object, which is then accessible in the Tree. If a Name is not supplied, the object will display in the Tree by the ID in parentheses. If a Name is supplied upon creation, the object will display in the Tree using the Name entry. For example, two new objects have been added under Customer C in the screenshot below. The first did not have a Name supplied, while the second did.



To create a new object via the Maintain menu:

From the menu in the upper left corner of the workbench, select Maintain > Insert and choose the appropriate option. Note that it is required to use this method when adding a new root node to Tree. Additionally, note that the available options differ based on the active selection when the menu is accessed. For example, the below shows

the available insert options when a classification has been selected, whereas the publication-related options would be enabled if a publication object had been selected instead.



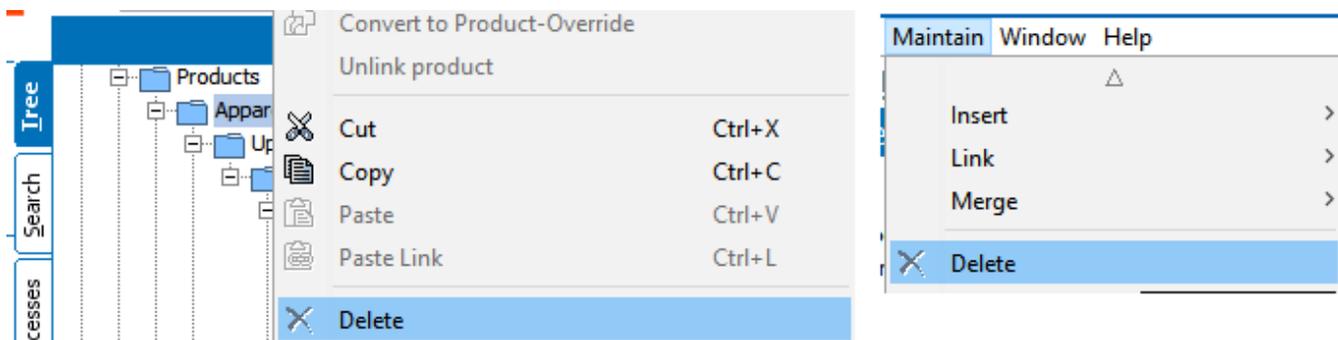
Many of the available options will only be enabled when an appropriate selection has been made on the System Setup tab. For example, an attribute group must be selected for the Attribute or Attribute Group options to be enabled.

Deleting Objects in Tree

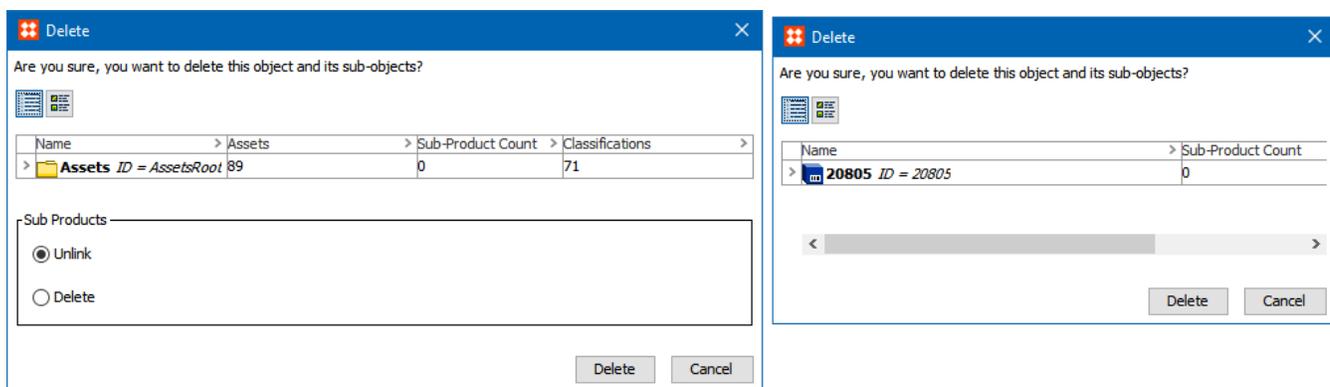
Regardless of the particular object type or hierarchy that you are working with, the general principles of deleting objects in the workbench are the same, and are described below.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

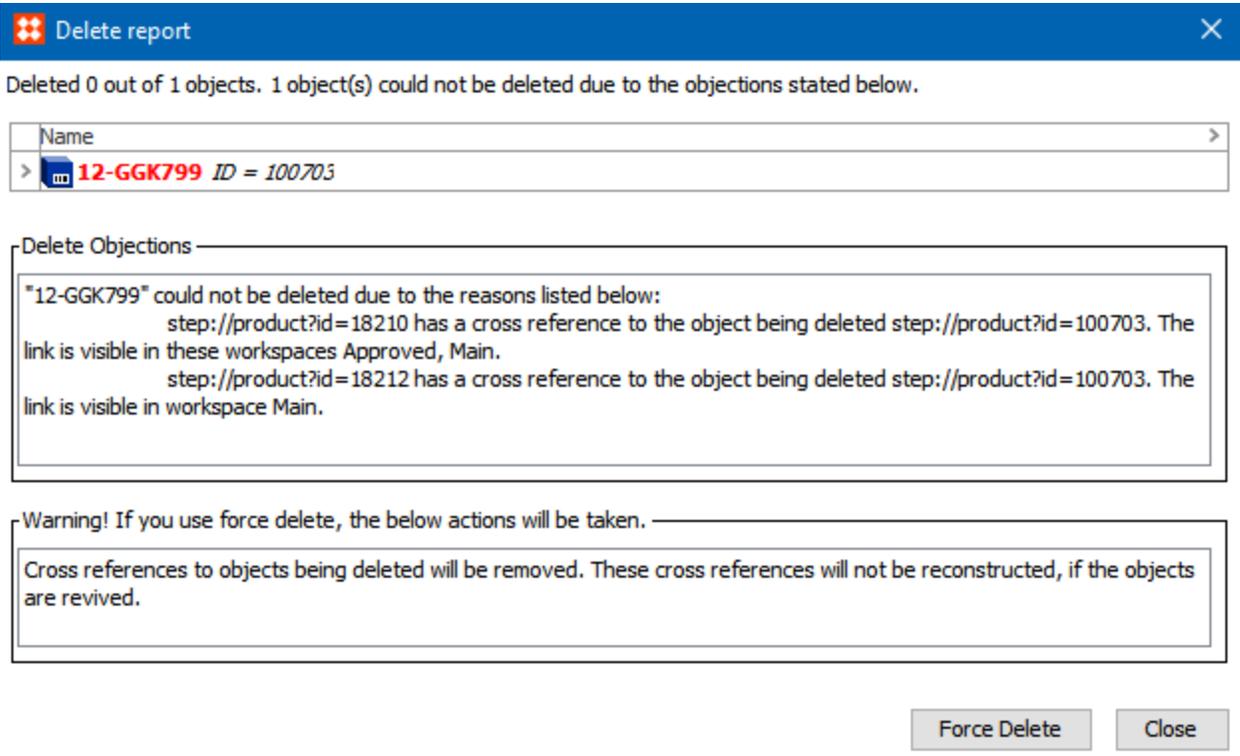
Objects can be deleted from the Tree by right-clicking on the object to be deleted, or via the Maintain menu when the object to be deleted has been selected. In both cases, the Delete option is selected from the menu, and deletion of multiple objects is supported using Ctrl or Command to multiselect.



Selecting Delete will open a deletion confirmation window, which will vary slightly based on the object selected for deletion. For example, a classification provides an option to unlink child products rather than delete them, while deletion of a product will automatically delete all child objects.

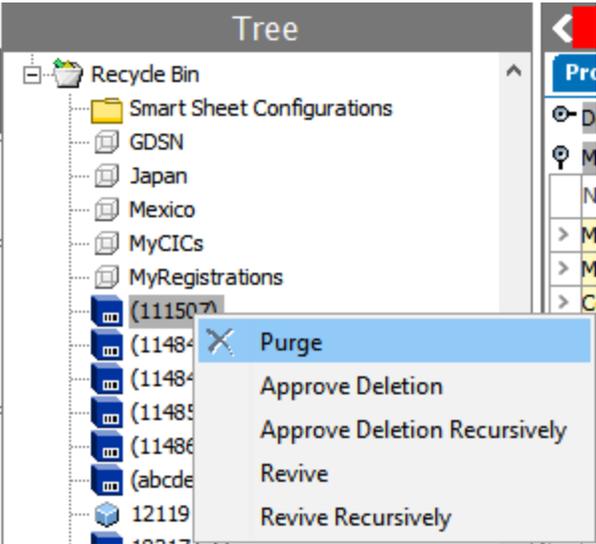


Clicking Delete will attempt to delete the selected object (and delete or unlink child objects as appropriate). A confirmation window will appear detailing success or failure. Note that in order to delete an object, a number of conditions must be met. For example, the object must not be referenced by any other object and must not be active in any workflow. If the deletion conditions are not met, the confirmation window will display the errors, which must be corrected prior to deletion of the object.



In some cases, a Force Delete option is available, though it is recommended to correct the data whenever possible rather than forcing deletion. Also note that updates may need to be approved in order to take effect. For example, if an object has been referenced by another and that reference has been approved, removing the reference must also be approved (by approving the change on the referencing object) to resolve the deletion objection.

Once an object has been deleted, it is visible in the Recycle Bin, from where it can be revived if needed. In order to fully delete the object, the deletion must be approved and the object purged. Following a purge, the object cannot be revived.



For more information on the Recycle Bin and the available actions, see the **Recycle Bin** topic within this guide.

Alternatively, an object can be deleted and purged in one go using the 'Force Delete & Purge' option in the Maintain menu. Choosing this option will bypass the Recycle Bin and is equivalent to completing a deletion and purge all in one action. However, this option does NOT cause an approve deletion event in the system, so if deletion events need to be recorded for output to downstream systems, this option should *not* be used.

Editing Objects in Tree

Objects can be easily edited within Tree, and general principles for editing are the same, regardless of the type of object. The available tabs will vary based on the object type selected, as well as other considerations such as data model and licenses. Some tabs are common across the various object super types, while others appear only on specific object types or subsets of object types. Additionally, some editors appear on more than one super type, but have differing functionality based on the type of object that has been selected.

This topic covers the editing functionality available across the various editors, and provides links to additional information for working with specific object types.

Note: All actions in STEP are controlled via privileges. Some users may not have access to create or delete objects, or may only have options to edit specific object types, hierarchies, or attribute values. The information below focuses strictly on the means for carrying out the various actions, and assumes that all required privileges are available to do so. More information on privileges is available in the **Privilege Rules** topic in the **System Setup / Super User** documentation.

When an object is selected, the main portion of the screen displays a corresponding editor. The main editor for the object is the first tab, which is Classification in the below example.

Description	
Name	Value
ID	IconRoot
Name	Icons
Object Type	Icons
Revision	0.1 Last edited by Stibo Systems on Fri Jan 02 00:00:00 EST 1970
Approved	✓ Approved on Fri Jan 02 00:00:00 EST 1970
Translation	Not Translated
Path	Classification 1 root/Assets/Icons
Visibility	
Purpose	Storage for icons

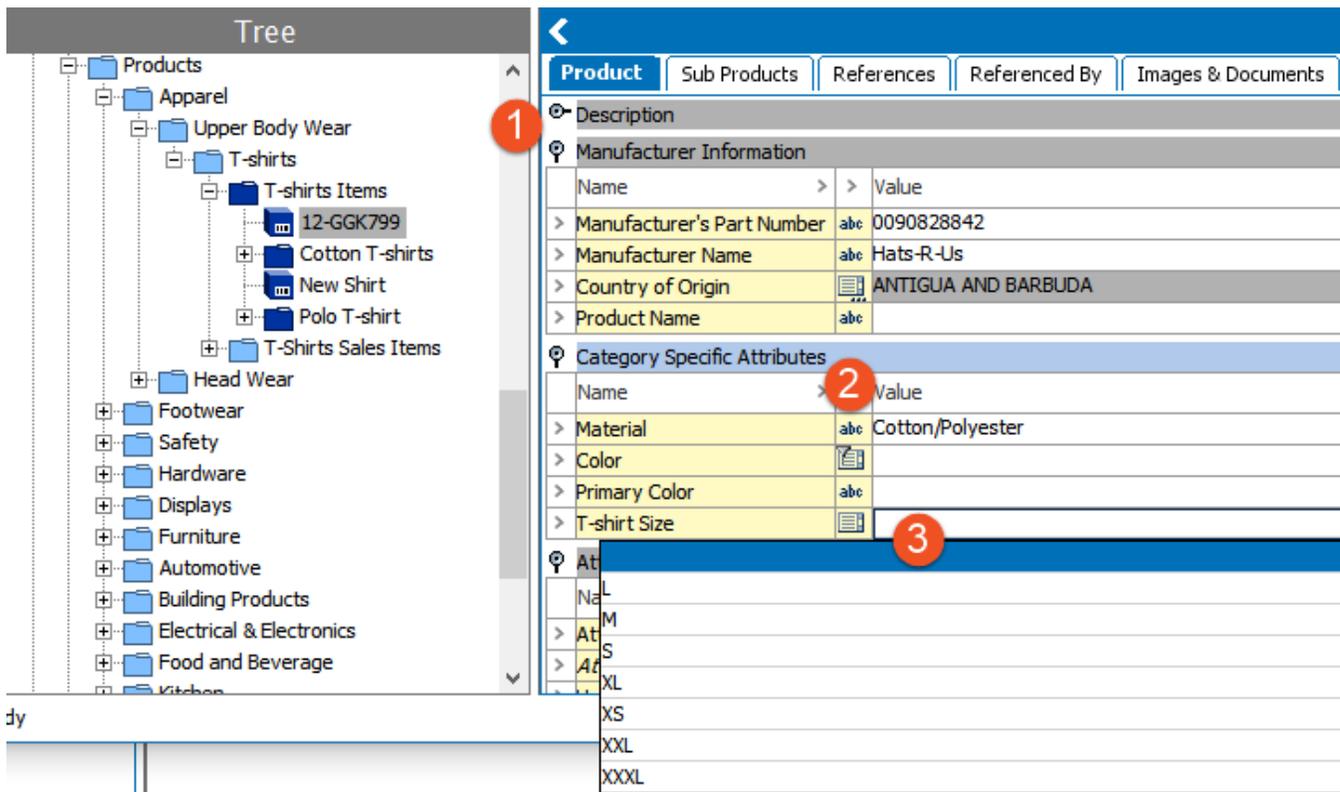
All objects will have an **ID**, **Name**, **Object Type**, **Revision**, and **Path** field. Objects that are subject to approval (known as 'workspace revisable') will also have an **Approved** field. **ID** cannot be changed once an object has been created, so the field appears yellow, meaning it is not editable. **Revision** and **Approved** data is auto-populated by the system, so these fields are also not editable. Conversely, object **Name** and **Object Type** can be edited (assuming the user has privileges to do so), so those fields appear white.

Note: Any number of attributes may be added to objects under the Description flipper. However, not all data shown in the Description section is an editable attribute. Fields such as ID, Revision, Approved, Translation, and

Path are *aspects* of the object (not attributes), and are not editable. Name and Object Type are also aspects of the object, though these may be edited.

Some object types only support Description attributes, meaning all object data is accessed under the **Description** flipper. For object types that support Specification attributes, data is organized by attribute group, and clicking the magnification icon (indicated by a 1 in the screenshot below) will collapse or expand each group, allowing users to focus on the relevant data. All attributes have a validation base type applied that determines the allowable data that can be entered, and is indicated by the icon to the right of the attribute name below (2). Detailed information on attribute validations is available in the **Validation Rules** topic in the **System Setup / Super User** guide.

To edit data, simply click in any editable field. Text attributes can be edited by typing directly into the field, while LOV attributes will provide a dropdown from which users can select a value, as shown below (3).



Pressing the tab key shifts the focus to the next cell and Shift+Tab shifts the focus to the previous cell. Alt + F2 opens the Rich Text Editor, allowing the user to access styling options. For a complete list of shortcuts, see the **STEP Workbench Keyboard Shortcuts** topic within this guide. The data fields available for editing will depend entirely on the data model and will vary for each implementation.

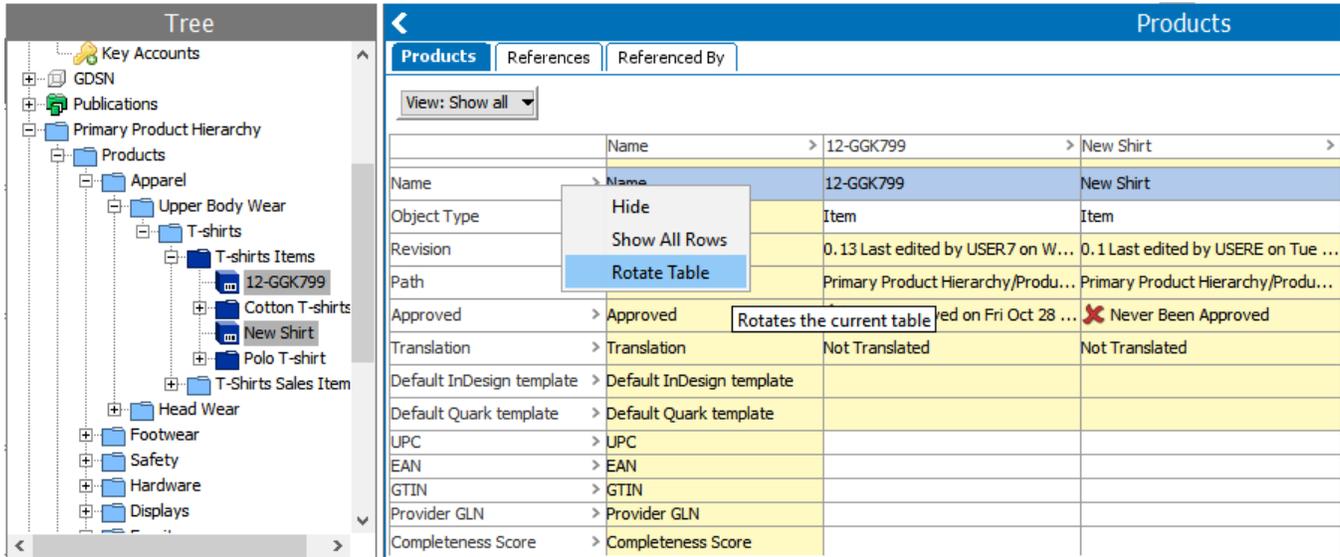
Note: Data edited in the workbench is auto-saved, with the change / save being applied as soon as the user exits any field. Therefore, no explicit save action is ever required by the user.

If an object is being edited that is workspace revisable (e.g., subject to approval), editing the object will change the approval status (if the object had been previously approved). See the **Approval of Objects** topic within this guide for more information on approvals.

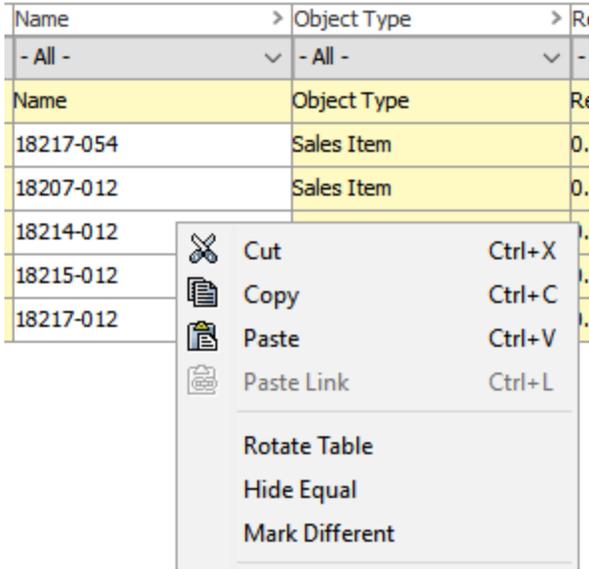
Multi-Editors

Objects can be multi-selected for editing using Ctrl + click, or by Shift + Down / Up arrow keys. Additionally, objects of the products and classification super types have a Sub Products tab that can be used for multi-editing. Functionality for editing objects is comparable, regardless of how the multi-editor interface is accessed.

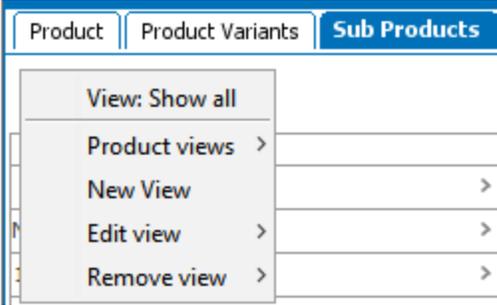
Right-clicking in any row *header* will expose the **Rotate Table** option which can be used to access the preferred orientation of the data (Pressing F11 will also rotate the table if any cell in the table is the active selection.). Editing in this manner allows for easy copy / paste of values between objects using Ctrl + C and Ctrl + V.



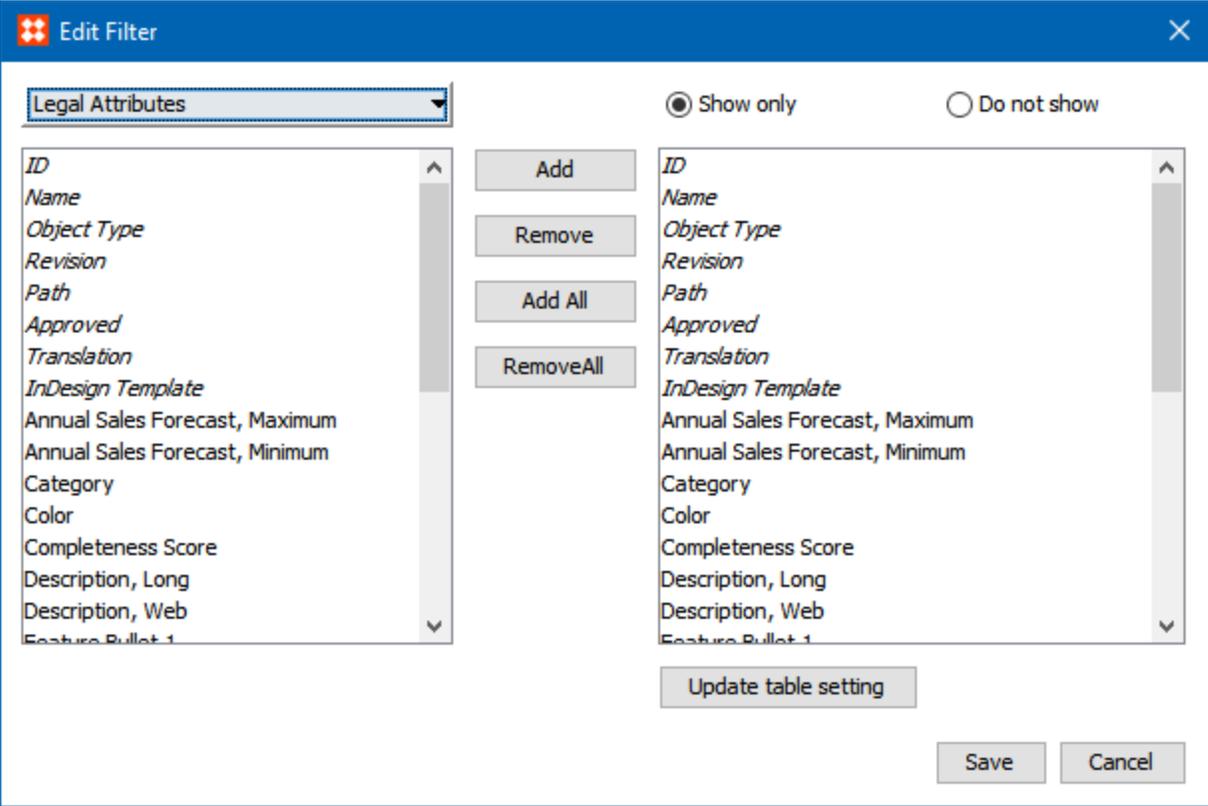
Right clicking in any data *cell* will expose the **Hide Equal** and **Mark Different** options, which are especially useful when working across multiple objects as they will hide all equal values, or highlight all different values, respectively.



Additional options for viewing data are available using the **View** menu located in the upper left corner of the multi-editors.



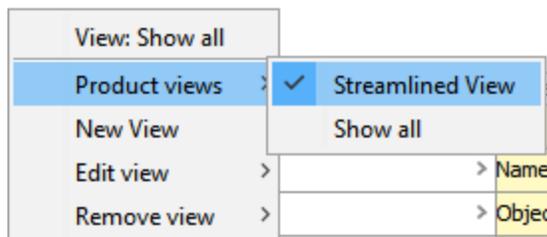
The default view option is to **Show all** which displays all data on the object, similar to what would be available in a single-object editor. Additional options can be configured using the **New View** option. Clicking this opens a dialog for users to enter a name of the view. Clicking OK in that dialog opens an Edit Filter dialog where the user can select the attributes to be included in the view.



The dialog defaults to having only "legal" attributes shown, meaning those attributes that are valid for the object, as well as standard aspects of the object such as ID and Name. Note that object aspects are italicized, while attributes are shown in standard text. By default, all available attributes and aspects are shown in both the left and right panels. The dropdown in the upper left corner also has options to expose standard attribute search / browse functionality, though typically the Legal Attributes selection is used as this prevents a user from defining an invalid

view. The 'Show only' and 'Do not show' radio buttons are applicable to the right panel, where the data for the view is defined. The **Add** button is used when an attribute or aspect has been selected in the left panel and should be added to the view (the right panel). The **Remove** button is used when an attribute or aspect has been selected in the right panel that should be removed the view. The **Add All** and **Remove All** buttons are used to add or remove all attributes and aspects from the view. Clicking **Save** stores the new view.

Once one or more views have been created, they are available for selection from the **View** menu under **Product views**.



An existing view can be edited using the **Edit view** option, and a view that is no longer needed can be removed with the **Remove view** option.

Note: Views are user-specific and machine-specific, so a view created by one user will always be available for that user when using the machine on which they created the view, but will not be available for any other user or for the same user working from a different machine. Workbench views are stored in an XML file on the user's local machine at C:\Users\[user]\STEPUserViews[UserID].xml. If the file is deleted, the configured views will no longer be available.

Right-Click Editing Options

Additional editing options are available by right-clicking within the various editors. These include standard cut / copy / paste options, as well as more exotic options which are briefly described below.

Note: Not all options are available and/or enabled at all times. Some options are available only for particular attribute validation types, and others are available only on specific editors and/or object types. Menus also change based on whether the right-click takes place on the column or row header, or within the active editable value field, as well as when a single object / column / row has been selected vs. when multiples are selected.

- **Character Tag:** Used as a quick option to add tags to attribute values without having to enter the Rich Text Editor. Character tags that have been defined for the system will be available as sub-options to the Character Tag selection. For more information, see the Tags topic in the System Setup / Super User guide.
- **Edit:** Used to open the Rich Text Editor for attribute values, allowing users to apply styles, formatting, spell check, special characters, etc.
- **Filter:** Used to filter the displayed data under any flipper, by values, and is exposed by clicking the column header. This can be especially useful when working with attribute groups with a large number of attributes in them as it allows users to filter based on empty / populated, greater than / less than, etc.
- **Footnote (Insert / Edit):** Used to add an additional piece of information (e.g., a footnote) to an attribute value. Footnotes are added / edited within the Rich Text Editor so using these options will open that dialog. Note that footnotes are only supported for use in conjunction with STEP tables. Using footnotes within attribute values

that will output in something other than a table will not yield the expected results. For more information on footnotes, see the Tags topic in the System Setup / Super User guide.

- **Hide:** Used to hide a particular row or column from view, and a hidden row or column is exposed by clicking on the row indicator or column header.
- **Hyperlink (Insert / Edit, Follow, End):** Used for adding hyperlinks to attribute values. Highlight text within the attribute value and select the insert option to provide a hyperlink to be assigned to the selected text. After inserting, and with the cursor at the end of the hyperlinked text, use the end option. This ends the hyperlink so that subsequent text does not become part of it. Use the edit option to edit a previously inserted hyperlink. Select the follow option while the cursor is within the hyperlinked text to follow the hyperlink. For more information, see the Tags topic in the System Setup / Super User guide.
- **Inline Reference (Insert / Edit, Copy as):** Used to add inline references to attribute values. Inline references are used to re-use values present within another attribute, object Name, or ID. This avoids duplication of data by maintaining the data only once, and re-using it from that source as needed. For example, a description attribute may need to dynamically include the object Name, e.g., '[Name] is a great product!'. Detailed information on working with inline references is available in the Inline References in Attribute Values topic within this guide.
- **Insert Special Character:** Used as a quick option to add special characters to attribute values without having to enter the Rich Text Editor. Opens an editor allowing for selection of the most recently used special characters, with an option to access a full Unicode character menu. For more information, see the Tags topic in the System Setup / Super User guide.
- **Override:** Used to manually populate a local value to override a calculated (derived) value. This option is only enabled on calculated attributes. For more information, see the Calculated Attributes topic in the System Setup / Super User guide.
- **Recalculate:** Used for on-demand display of calculated attribute values in the editor if they have previously been disabled via the 'Disable calculated values' option in the View menu. For more information, see the Calculated Attributes topic in the System Setup / Super User guide.
- **Rotate Table:** Used to rotate the data display. As a right-click option, it is only enabled from row / column headers when multiple objects are selected. For a single object, it can be used to rotate the data under a flipper only via keyboard shortcut (Alt + F11).
- **Show All (Rows / Columns):** Enabled after the Hide action has been taken, and exposes all hidden rows / columns.
- **Sort:** Used to sort data based on attribute value rather than attribute name or display sequence. This option is exposed when a column header is selected, and requires a sort selection (Ascending, Descending, or None).
- **Style:** Used as a quick option to add styling to attribute values (e.g., bold or italics) without having to enter the Rich Text Editor. Styles that have been defined for the system will be available as sub-options to the Style selection. For more information, see the Tags topic in the System Setup / Super User guide.

Additional Information

In addition to the main editors for objects, several other tabs / editors are available for editing objects, such as References, Referenced By, etc. However, the available editors and functions within them vary based on the selected object. Therefore, they are described in the context of the type of object being edited, in the subsequent

sections of this guide:

- Assets
- Classifications
- Collections
- Entities
- Products
- Publications
- Recycle Bin

Inline References in Attribute Values

Inline references can be embedded in attribute values for attributes that have **text** and **numeric text** validation base types. An inline reference use case follows:

You are working with product objects whose model number is the same as their STEP ID (for example, '12345'). On these objects there is an attribute called 'Product Description' that needs to dynamically reference the object's model number within the text of the attribute. For a Product Description such as 'Acme lawn mower, model number 12345,' the inline reference to the STEP ID would populate '12345.' Using an inline reference in this instance helps to avoid duplication of effort—since the product's model number already exists in STEP as its ID, there is no need for users to manually enter it a second time into the system.

Also, in many cases inline references are easier to use than calculated attributes and easier on system resources. For example, it may be easier for users to use an inline reference to pull in a STEP ID than to create a calculated attribute using the formula 'StepID()'.

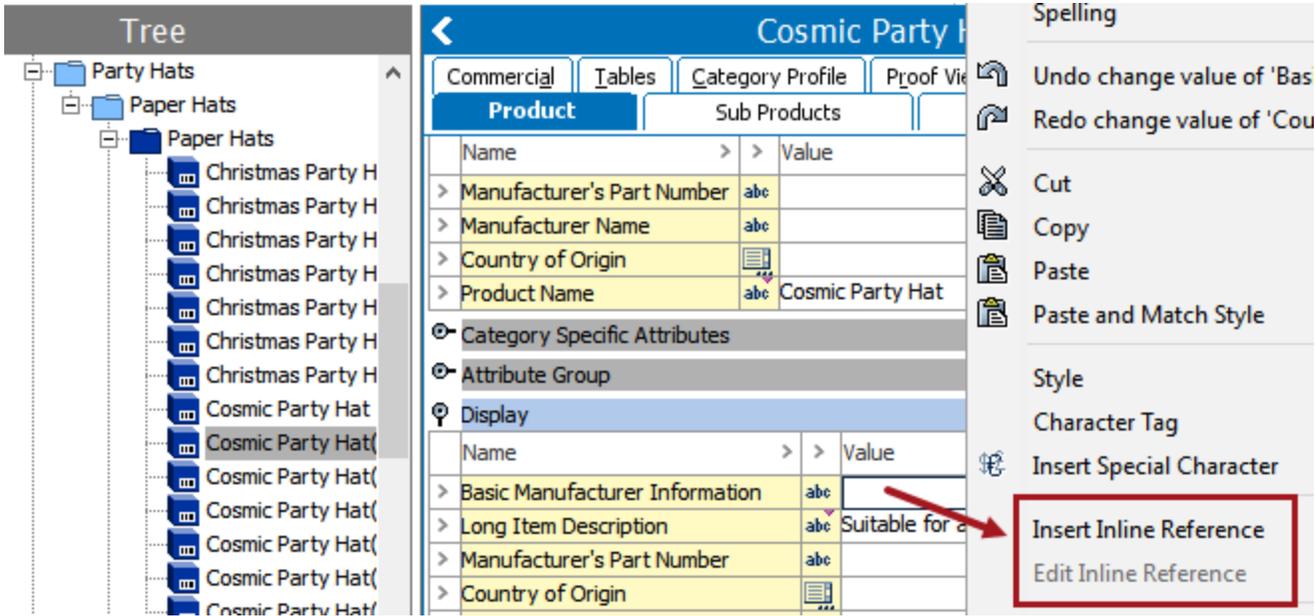
One attribute value can include several inline references. An inline reference can reference either a single attribute or an attribute group.

Inserting an Inline Reference using Workbench

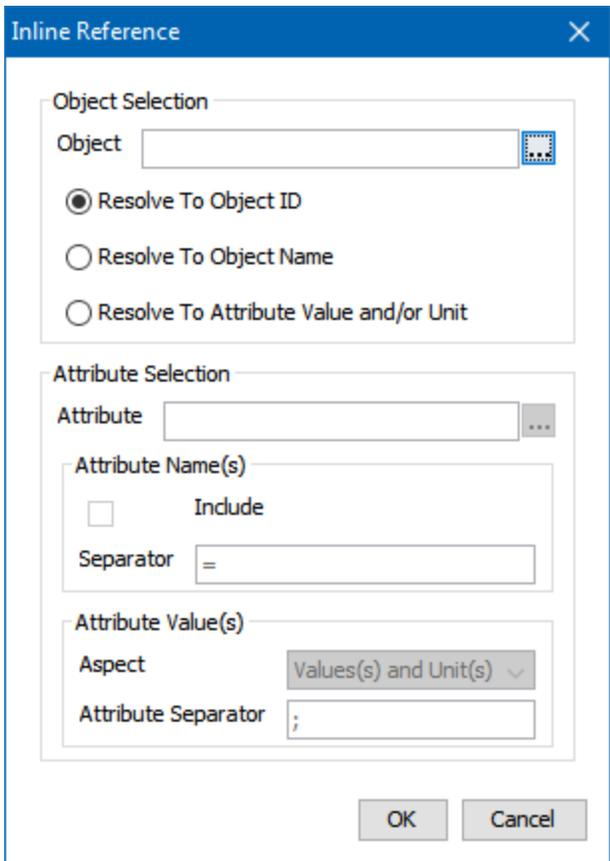
1. Select the relevant node. The corresponding editor appears.
2. Click on the leftmost tab within the editor, which is different depending on the object type (for example, 'Product', 'Classification', 'Images & Documents', 'Publication,' and so forth).
3. Activate the **Value** field of the relevant attribute where you want to create or edit the inline reference. Or, highlight the field, right-click, and select **Edit** to launch the larger value editor.

Note: Pressing **Alt + F2** will also open the value editor.

4. Place the cursor at the position in the **Value** field where you want to insert the inline reference, or place the cursor on an existing inline reference to be edited.
5. Right-click, and then click **Insert Inline Reference** to add a new inline reference or **Edit Inline Reference** to edit an existing inline reference.



6. The **Inline Reference** dialog displays.



7. If you do not wish to return the name or ID of the current object and instead want to return a value or values from another object in STEP, click the ellipsis button (...) to the right of the **Object** field. Ignore this field if you plan to return value(s) from the current object instead.
 - In the 'Select Object' dialog that displays after clicking the ellipsis, search for or browse to the object that holds the value(s) that you would like to return, then click **Select** to choose the object.
8. Select **Resolve To Object ID** to return the value of the STEP ID of the chosen or current object.
9. Select **Resolve To Object Name** to return the value of the STEP Name of the chosen or current object.
10. Select **Resolve to Attribute Value and/or Unit** to activate the options in the 'Attribute Selection' portion of the Inline Reference dialog.
11. Click the ellipsis button (...) to the right of the **Attribute** field to open the 'Select Attribute or Attribute Group' dialog.
12. Search for or browse to the relevant attribute or attribute group for the inline reference, and then click **Select**.
13. For **Attribute Name(s)**, check the **Include** box if the name of the attribute(s) should be included in the inline reference.
14. In the **Separator** field, type a separator to be used between the name and value of the attribute. The default is the equals sign (=). Note that the Separator field is not activated unless the **Include** box has been checked.

For example, if a single attribute is chosen, and the **Include** box is checked, the results will look as follows:

The screenshot shows the 'Inline Reference' dialog box with the 'Attribute Selection' section highlighted in red. The 'Attribute' field is set to 'Manufacturer Name', the 'Include' checkbox is checked, and the 'Separator' field contains '='. To the right, a table shows the resulting inline reference output:

Display		
Name	>	Value
> Basic Manufacturer Information	abc	Manufacturer Name=Acme Party Supplies

A red arrow points from the 'Include' checkbox in the dialog to the 'abc' value in the table, indicating that the attribute name is included in the output.

15. Under **Attribute Value(s)**, select the relevant **Aspect** from the dropdown list. Available options are 'Value(s) and Unit(s),' 'Unit(s),' and 'Value(s).'
16. In the **Attribute Separator** field—which is only valid when an attribute **group** has been chosen for the Attribute selection—type in one or more characters to specify how the attribute values should be separated. The default is the semicolon character without a following space (;).

The following screenshot shows:

- (1) An attribute group called 'Manufacturer Information' selected for **Attribute**
- (2) A **separator** of = placed between the attribute name and attribute value
- (3) An **attribute separator** of ; placed between each attribute within the group
- (4) How the attributes and attribute values resolve in the inline reference.

The screenshot shows the 'Inline Reference' dialog box with the following configuration:

- Object Selection:** Object: [Empty], Resolve To Object ID, Resolve To Object Name, Resolve To Attribute Value and/or Unit (1)
- Attribute Selection:** Attribute: Manufacturer Information (1)
- Attribute Name(s):** Include
- Separator:** = (2)
- Attribute Value(s):** Aspect: Values(s) and Unit(s)
- Attribute Separator:** ; (3)

The resulting inline reference shows the resolved values for 'Manufacturer Information' attributes:

Name	Value
> Manufacturer's Part Number	abc 121177
> Manufacturer Name	abc Acme Party Supplies
> Country of Origin	HONG KONG
> Product Name	abc Cosmic Party Hat

The final inline reference output is:

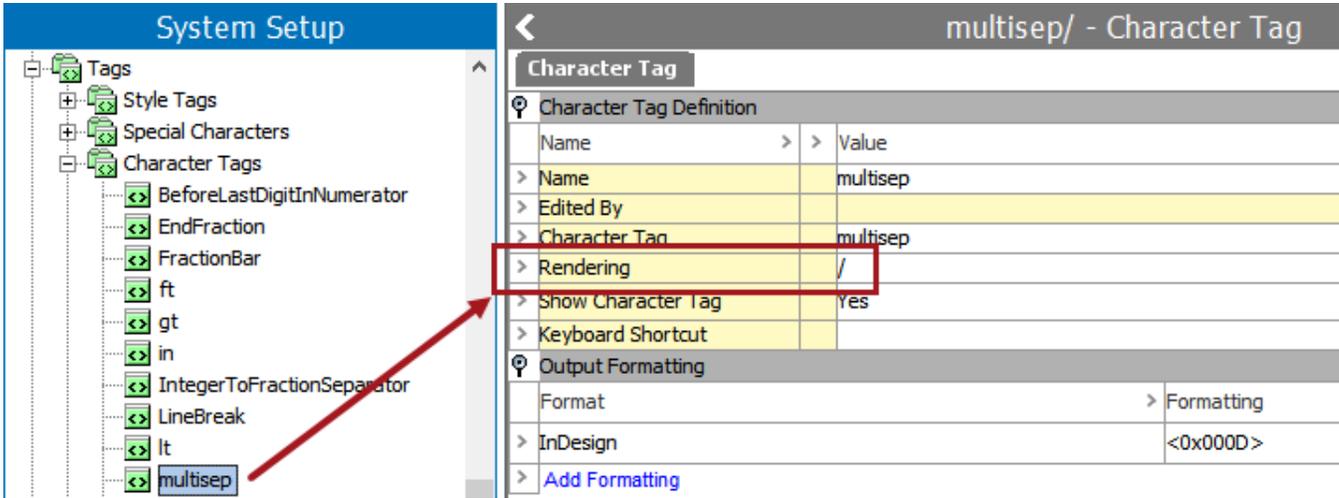
Name	Value
> Basic Manufacturer Informati	abc Country of Origin=HONG KONG;Manufacturer Name=Acme Party Supplies;Manufacturer's Part Number=121177;Product Name=Cosmic Party Hat

Red arrows and numbers 1-4 point to the corresponding elements in the dialog and the resulting output.

17. Click **OK** to complete the configuration of the inline reference.

Inline References and Multi-Valued Attributes

The **Attribute Separator** field in the Inline Reference dialog does *not* apply to the values of multi-valued attributes. Instead, the separator for values of multi-valued attributes is handled by the <multisep/> tag (**multisep**). The multisep tag is a **Character Tag** in System Setup and comes standard with STEP systems. STEP stores the values of multi-valued attributes with the multisep tag between them, and this tag typically renders as a forward slash (/).



If a multivalued attribute is used in an inline reference, the rendering setup for the multisep tag will be shown between each of the values. In the below example, the 'Country of Origin' attribute has four values. When rendered in the inline reference, these four values are separated by the forward slash (/) character.

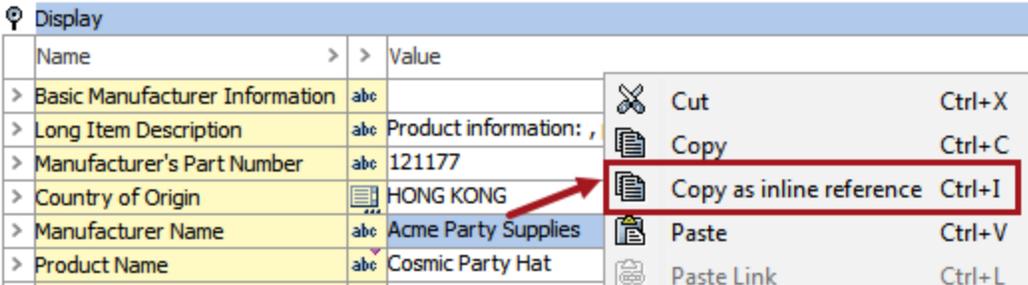


For more information on STEP character tags, see the **Tags** topic in the **System Setup / Super User Guide** documentation.

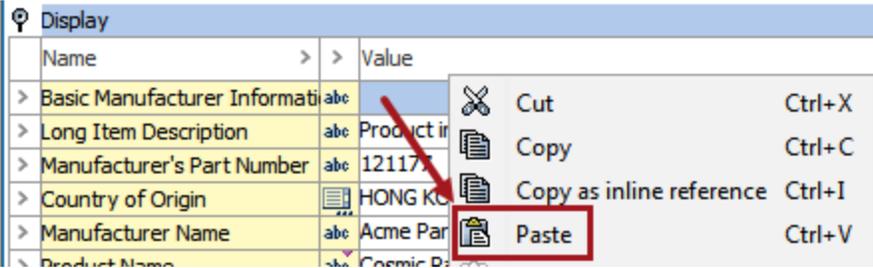
Copying Attribute Values as Inline References

An alternate—and quicker—method of creating an inline reference is to copy the value of an attribute, then paste it into the value editor of another attribute as an inline reference. This inline reference can then be edited like any other inline reference.

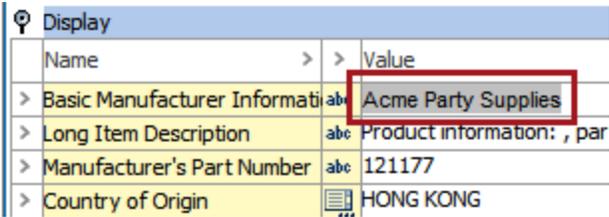
1. Navigate to the attribute value that you would like to use as an inline reference and select the value editor field.
2. Right-click and select **Copy as inline reference**.



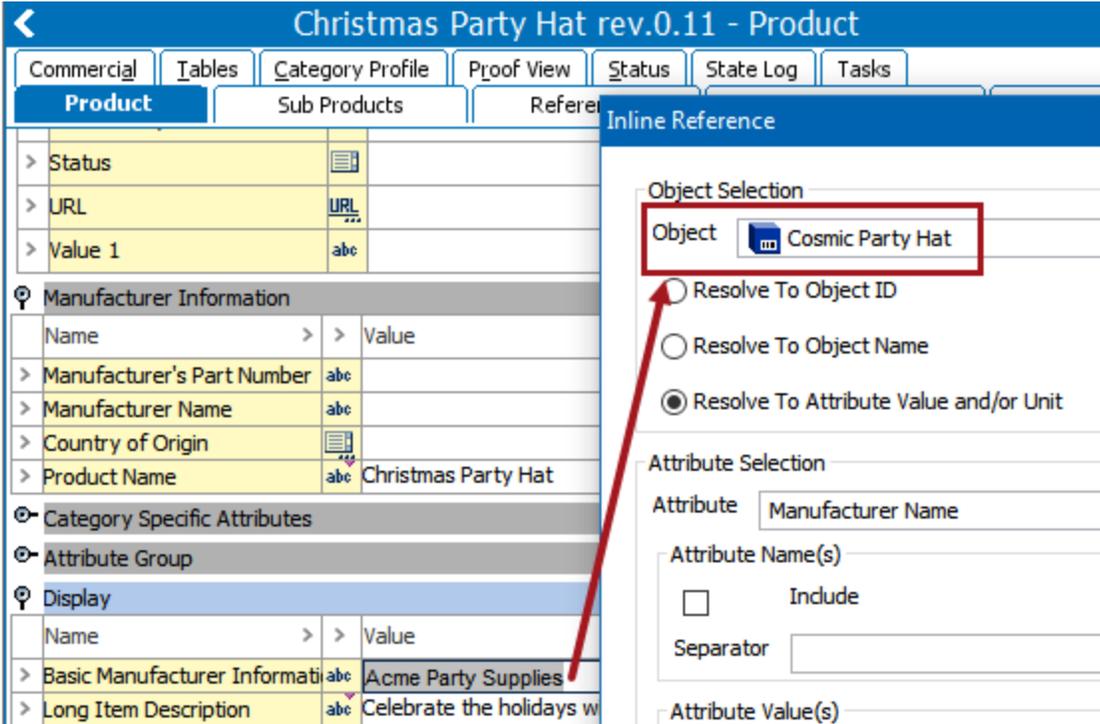
- Navigate to the 'destination' attribute value and select the value editor field.
- Right-click and select **Paste**.



- The value appears in the destination field as an inline reference.



Note: The copied 'source' attribute value is connected to the 'source' object, meaning that any time an attribute value is copied as an inline reference and pasted elsewhere, the inline reference will never pick up the attribute value from the current object but only from the 'source' object. Also, STEP IDs and STEP names cannot be copied as inline references.



Inserting an Inline Reference using Web UI

Rich text editing allows users to enter and edit text within a web browser. Inline references can be inserted into an attribute value using a Rich Text Editor (RTE) within a Node Editor.

Adding an inline reference in Web UI is similar to adding one in the workbench. For instructions, see the **Rich Text Editor** section of the **Web User Interfaces** documentation.

Assets

This topic covers information specific to the asset super type that is important to know when working with assets. For general object maintenance information (applicable to all object types rather than specific to assets), see the **All Objects** topic within this guide.

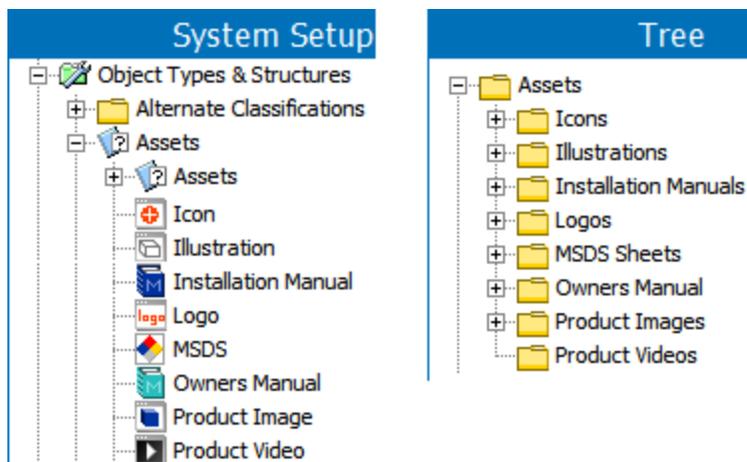
An asset is any product-related electronic file, such as images (tiff, eps, jpeg, etc.), Word docs, Excel files, PDFs, PowerPoint files, text files, etc. Images are a common asset so they will be the focus of this section. In most cases, the terms “asset” and “image” are interchangeable.

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

Classification of Assets

Asset objects live in a classification hierarchy. The classification hierarchy for assets should be separated from other classification hierarchies (e.g., those used for alternate structuring of products, import / export configuration storage, etc).

The recommendation is to have one classification object type and instance for each asset object type. For example:



Within the individual type-based classifications, additional levels can be modeled if necessary. A common option here is to work with a 2-level folder structure based on the first characters of the asset file name. For example:



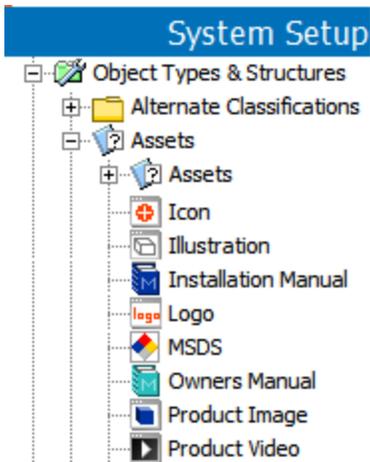
With a structure like this, it is not intended that users should be browsing the hierarchy to locate assets. Instead, assets are typically located via references from other objects and/or via searches. Note that STEP does not require that the image hierarchy have multiple levels. Assets can be stored in a single folder (e.g., a flat structure). However, this is not typically recommended as it can be impractical to navigate the hierarchy as the number of assets increases.

Notice that the same asset object can exist below multiple different classifications. However, this functionality is typically only used for cases where suppliers upload assets. These assets will initially go into supplier-specific classifications and can subsequently also be linked into the primary asset hierarchy.

Asset File Type Designation

New asset object types are defined in STEP the same way any other object types are, via the System Setup tab. One key difference between asset object types and other object types, such as products or classifications, is that there are no parent-child relations between assets, as asset instances live in classification hierarchies.

Asset object types are defined in the STEP Workbench System Setup under 'Object Types & Structures'. Apart from the built-in generic type 'Assets', it will be a flat list of the different asset object types required for the setup. For example:

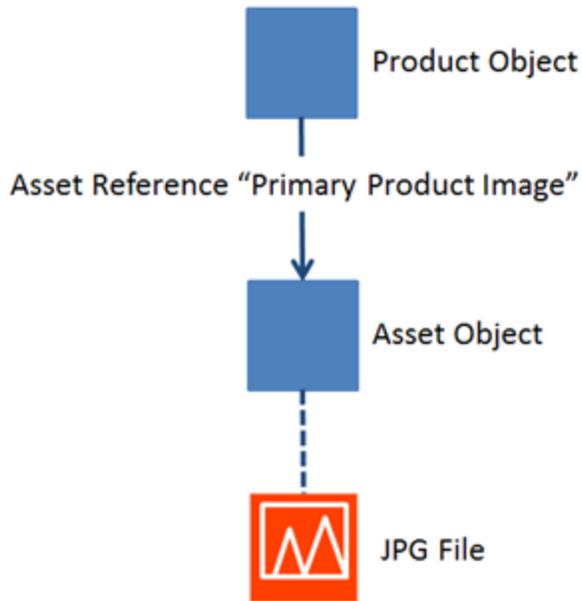


On older STEP installations you will often see asset object types that are file type specific. For example: JPG Image, Word Document, etc. For newer installations, this file type approach is generally not used, and instead, it is recommended to use object types that convey information about the asset's use (as shown above), rather than the file type. This is done for clarity as it is often more important to understand the purpose of the asset. For example, an asset is not just a PDF file, instead it is an Installation Manual, a Product Brochure or an Owner's Manual. One advantage of the purpose-based setup is that it is possible to restrict reference types to point to the specific types of assets and not just to generic file types.

With the move away from file type specific asset object types, asset object types cannot be applied automatically when digital media files are imported into STEP as there is no 1:1 relationship between file types and asset object types. It is possible to have object types automatically applied upon import when a file-based approach is used, but this functionality generally does not weigh up to the disadvantages of the approach.

Asset Objects and Digital Media Files

A fundamental point when dealing with assets is that there is no 1:1 relationship between asset objects and digital media files in STEP. Thus, it is possible to work with asset objects that do not have "content", i.e., are not tied to any digital media files. Furthermore, the content can be dimension-dependent so that an asset is tied to different files in different contexts. Finally, an asset can have different content in different historical revisions.



As explained in the next section, there are different options for how and where the actual digital media files are stored. Independently of which option is selected, asset objects are stored in STEP and it is to these objects (not to the actual media files) that relations are modeled (using references).

Image Variants and Handling

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

To handle these scenarios, STEP can use the original high resolution image to generate the needed image versions based on a set of templates or image conversion pipelines. When using an image conversion, the images in STEP must be of sufficient quality to allow these variations to be properly created.

More information on image conversions is available in the **Image Conversion Configurations** topic in the **Digital Asset Exchange** guide.

More Information

For specific details about working with assets in the workbench, see the **Maintaining Assets** and **Linking Assets to Products** topics within this guide.

For information on working with assets in Web UI, see the **Asset Handling in Web UI** topic in the **Web User Interfaces** guide.

For information on importing or exporting assets, see the **Digital Asset Exchange** guide.

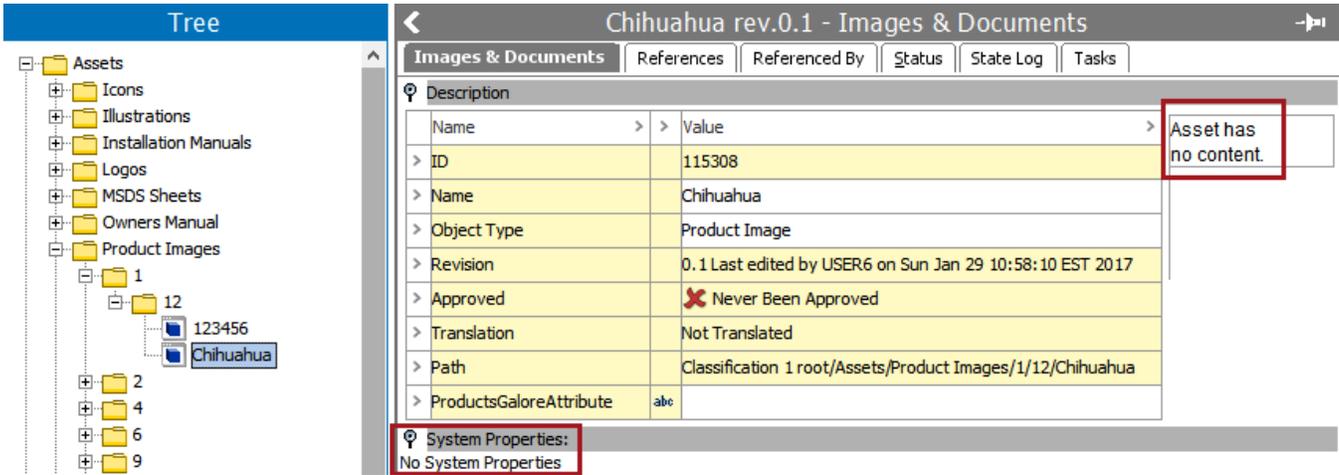
Maintaining Assets

This topic covers information specific to the Asset super type that is important to know when working with assets. For general object maintenance information (applicable to all object types rather than specific to assets), see the **All Objects** topic within this guide.

Creating Assets

The basic methods for creating an asset are the same as any other object type, as described in the **Creating Objects in Tree** topic within this guide. However, there are a few considerations that are specific to assets that users should be aware of when creating assets, which are described here.

Assets are essentially placeholders in STEP, to which a digital media file must be associated. When assets are created in STEP via import of a digital media file, this association happens automatically. However, when assets are created using standard object creation methods in Tree (e.g. right-clicking on a classification folder and selecting 'New Asset'), it is only the placeholder that is created. An asset created in this manner will initially have no system properties and no content. For example:



A user can right-click on the asset and select **Replace Asset Content** to open a dialog where a digital media file can be selected from the local machine. STEP will automatically read and populate the properties of the asset, and a thumbnail of the digital media file will display. For example:

Tree

- Assets
 - Icons
 - Illustrations
 - Installation Manuals
 - Logos
 - MSDS Sheets
 - Owners Manual
 - Product Images
 - 1
 - 12
 - 123456
 - Chihuahua**
 - 2
 - 4
 - 6
 - 9
 - A
 - B
 - C
 - D
 - E
 - F
 - G
 - H
 - I
 - L
 - M
 - O
 - P
 - R
 - S
 - W
 - Y
 - Chrysanthemum
 - Product Videos
 - Configurations
 - ETIM Hierarchy

Chihuahua rev.1.0 - Images & Documents

Images & Documents | References | Referenced By | Status | State Log | Tasks

Description

Name	Value
ID	115308
Name	Chihuahua
Object Type	Product Image
Revision	1.0 Last edited by USER6 on Sun Jan 29 10:59:56 EST 2017
Approved	Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Product Images/1/12/Chihuahua
ProductsGaloreAttribute	abc

System Properties:

Name	Value
Class	True color
Colorspace	RGB
Compression	JPEG
Depth	8 (bits/sample)
Extension	jpg
Filename	136.JPG
Format	JPEG (Joint Photographic Experts Group JFIF image)
Height	1151.46 (mm)
MIME Type	image/jpeg
Pixel Height	3264 (pixels)
Pixel Width	2448 (pixels)
Profile	Custom EXIF, Custom XMP
Samples	3 (samples/pixel)
Size	2,270,288
Upload Time	2017-01-29 10:59:56
Width	863.59 (mm)
Horizontal DPI	72 (dpi)
Vertical DPI	72 (dpi)

To avoid this two step process, assets are often introduced in STEP via import (or specific transfer protocols for an initial implementation). More information on importing assets is available in the Importing Assets section of the Digital Asset Exchange guide.

Asset Editor

General information about editing objects in STEP is available in the **Editing Objects in Tree** topic within this guide and is not repeated here. However, assets have some additional editing options specific to working with digital media files, which are described here.

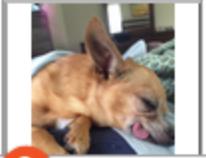
Images & Documents

The Images & Documents tab is the primary workbench interface for assets. It has three sections, described below.

Images & Documents | References | Referenced By | Status | State Log | Tasks

1 Description

Name	Value
ID	115308
Name	Chihuahua
Object Type	Product Image
Revision	1.0 Last edited by USER6 on Sun Jan 29 10:59:56 EST 2017
Approved	✘ Never Been Approved
Translation	Not Translated
Path	Classification 1 root/Assets/Product Images/1/12/Chihuahua



3 Edit Asset
External Viewer
Save to disk
Image Viewer

2 System Properties:

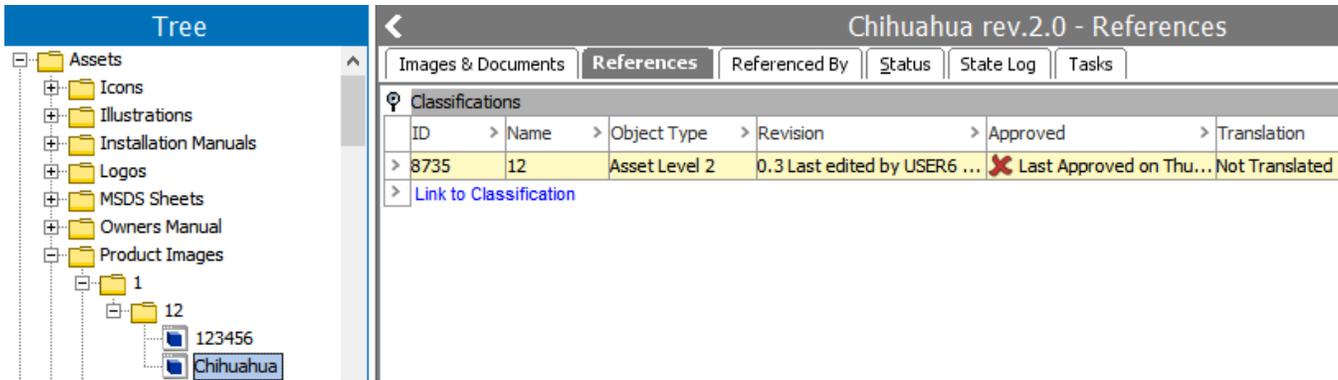
Name	Value
Class	True color
Colorspace	RGB
Compression	JPEG
Depth	8 (bits/sample)
Extension	jpg
Filename	136.JPG
Format	JPEG (Joint Photographic Experts Group JFIF image)
Height	1151.46 (mm)
MIME Type	image/jpeg
Pixel Height	3264 (pixels)
Pixel Width	2448 (pixels)
Profile	Custom EXIF, Custom XMP
Samples	3 (samples/pixel)
Size	2,270,288
Upload Time	2017-01-29 10:59:56
Width	863.59 (mm)
Horizontal DPI	72 (dpi)
Vertical DPI	72 (dpi)

1. The **Description** flipper contains the same basic information as other object types. Additional Description attributes can be made valid for assets to support data such as keywords or asset descriptions. Specification attributes cannot be made valid for assets.
2. The **System Properties** flipper displays data that is read automatically from the digital media file. This information cannot be edited.
3. The asset thumbnail has a number of options available for editing assets. Additional right-click options are also available when the asset itself is right-clicked from the Tree. All of the options that are specific to assets only (accessible from right-click on the thumbnail or the asset) are described below.
 - **Create Local Content of Asset:** Creates a local version of the asset specific to the current context. See the Asset Dimension Dependencies section below for more information.

- **Delete Local Content of Asset:** Deletes the content of an asset that is *not* dimension dependent. Deletes the *local* (context-specific) content of the asset if the asset *is* dimension dependent. See the Asset Dimension Dependencies section below for more information.
- **Edit Asset:** Opens the digital media file for editing in an external program, in addition to an Edit Asset dialog in STEP. Upon completion of editing in the external program, click save within the program to store the edited asset to a temporary directory. Then click OK in the Edit Asset dialog in STEP to have STEP retrieve the edited file from the temporary directory and store this in the asset. Note that the media file will open in the application associated with the file type. For example, for files ending with .xls, Excel will automatically be launched. This may be different from computer to computer. One user's computer may open up EPS images in Photoshop, while another user's computer may open the same file types in Illustrator.
- **Export Images & Documents:** Opens the Export Images and Documents wizard to make selections to export the currently selected asset(s). See the Export Images and Documents Wizard topic in the Digital Asset Exchange guide for more information.
- **External Viewer:** Opens an external viewer for viewing the asset. This is comparable to the Edit Asset function in that the program that is utilized is specific to the file type and the user's computer settings. It differs in that any changes made to the asset in the external program are not saved back to STEP.
- **Image Viewer:** Opens an image viewer within STEP for the user to examine the actual asset (as opposed to just the thumbnail).
- **Push Asset(s):** Initiates asset push for the selected asset(s). See the Asset Push section of the Digital Asset Exchange guide for more information.
- **Replace Asset Content:** Opens a dialog for the user to select a digital media file for the asset. See the Creating Assets section above for more information.
- **Save to disk:** Opens a standard save dialog allowing the user to select a location on their local machine to save the digital media file to.
- **Unlink asset:** Only enabled if the asset has been linked directly into a publication, in which case it unlinks the asset from the publication. See the Publications section of this guide for more information.

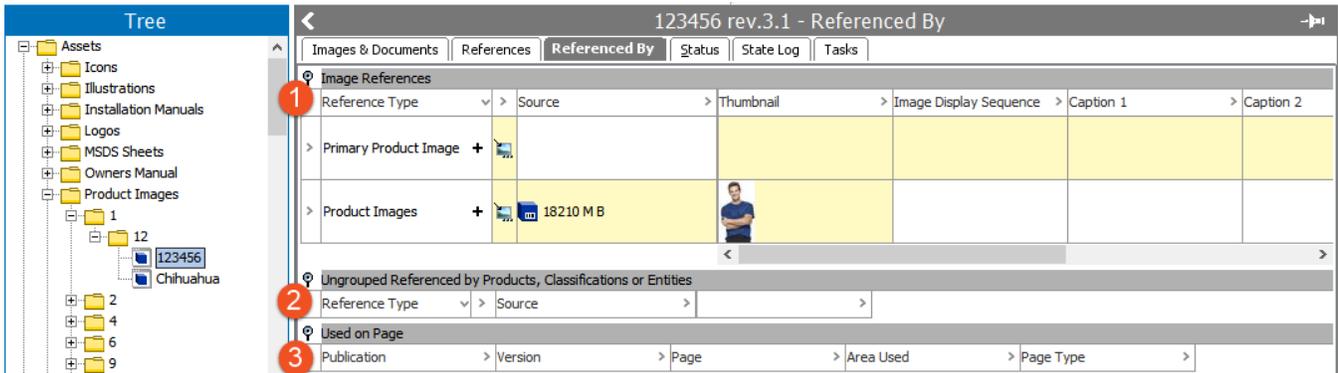
References

The References tab displays the classifications that the selected asset is linked to, and allows for linking to additional classifications using the **Link to Classification** link. Each asset must be linked to at least one classification, but may be linked to many. Links can be removed by right-clicking on the row indicator and selecting 'Remove Link to Classification'. The Name of each classification displayed is hyperlinked for easy navigation, and revision, approval, and translation statuses are also displayed.



Referenced By

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). The display of the Referenced By tab on an asset will vary slightly from system to system, based on the data model.



- Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid target that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a source for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.
- Ungrouped Referenced by Products, Classifications or Entities:** The functionality here is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
- Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the Publications section of this guide.

Status

The Status tab provides general information about objects, including revisions, translation status, and approval status. For more information on these basic settings, see the Status Tab topic in the Products section of this guide. For assets specifically, this tab also includes an Asset Push Status section that describes the status of assets for the various asset push configurations on the system. For more information, see the Monitoring Asset Push topic in the Digital Asset Exchange guide.

State Log

The State Log tab allows users to view the recent history of the object across all workflows in which it has been entered. See the State Log Tab topic in the Workflows documentation for more information.

Tasks

The Tasks tab displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the 'Moving Tasks through a Workflow in Workbench' topic in the Workflows guide.

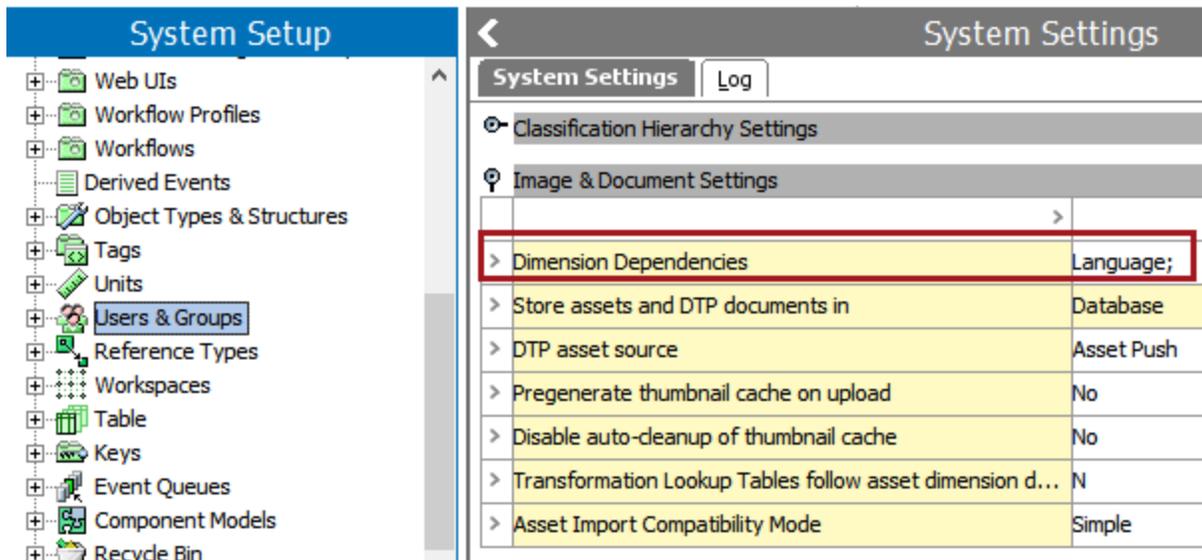
Asset Dimension Dependencies

Individual asset object types can be made dimension dependent using the Dimension Dependencies parameter on the object type. This configuration will only affect the STEP Name of assets, meaning that it allows for individual assets to have a different name based on the indicated dimension dependencies (e.g 'Red Hat' in English and 'Chapeau Rouge' in French when the dependency is Language).

The screenshot shows the 'System Setup' interface with a tree view on the left and a configuration panel on the right. The tree view shows 'Object Types & Structures' expanded to 'Assets', where 'Icon' is selected. The configuration panel, titled 'Icon - Object Type', has tabs for 'Object Type', 'References', and 'Log'. The 'Object Type' tab is active, showing a table of properties for the 'Icon' object type. The 'Dimension Dependencies' property is highlighted with a red box and has the value 'Language;'.

Description	
Name	Value
ID	Icon
Name	Icon
Last edited by	2017-01-29 12:07:47 by USER6
Name Pattern	
ID Pattern	[id]
Icon	
MIME Types	application/postscript image/tif image/tiff
Dimension Dependencies	Language;
Reference Target Lock Policy	Strict

It is also possible to make the content of assets dimension dependent so that an asset in STEP can be tied to different digital media files in different Contexts. This is configured using the Image & Document Settings > Dimension Dependencies parameter in System Settings.



This setting is global, meaning it applies to all assets. Unless there is a very special reason for turning on asset dimension dependencies, this should be avoided. As mentioned, the setting is global, meaning that special procedures must be implemented for creating assets that are to have the same content in all contexts. Thus, if you import a digital media file (and via this create an asset instance) in a context that does not use the top level dimension point for the dimension on which asset content depends, the content will be created only in the dimension point the current context uses.

Linking Assets to Products

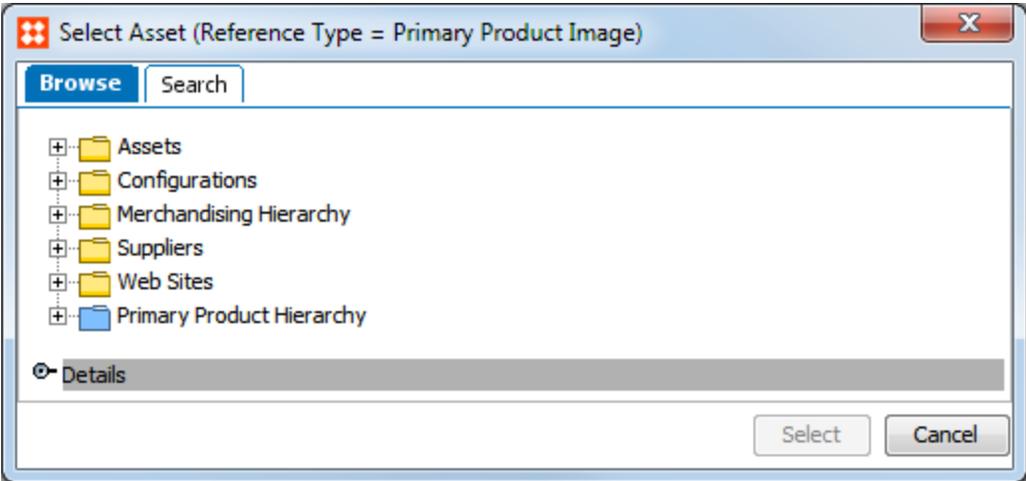
If the asset's name can be matched to the product, then this function can be performed when the asset is imported. If not linked at this time, there are two ways that the interface allows the link to be made: a) from the product or b) from the asset.

Linking Assets to Products (From Products)

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

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

A search window will appear.



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

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

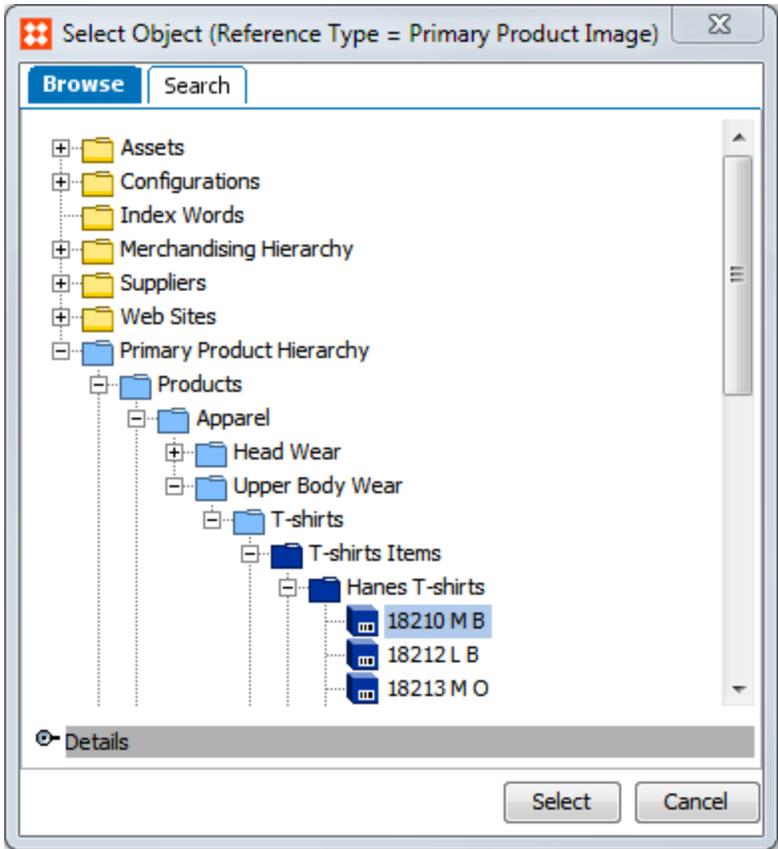
Note: When assets are linked to products, you must designate what type of reference is being made. For example, is it an image that represents the product? Is it an accessory to the product? Or a related document? This reference type denotes that the image being linked to the product is a direct representation of that product. When you make such a reference, a thumbnail of the image is attached to the product. The thumbnail will only appear for this reference type.

Linking Assets to Products (From Assets)

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

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

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

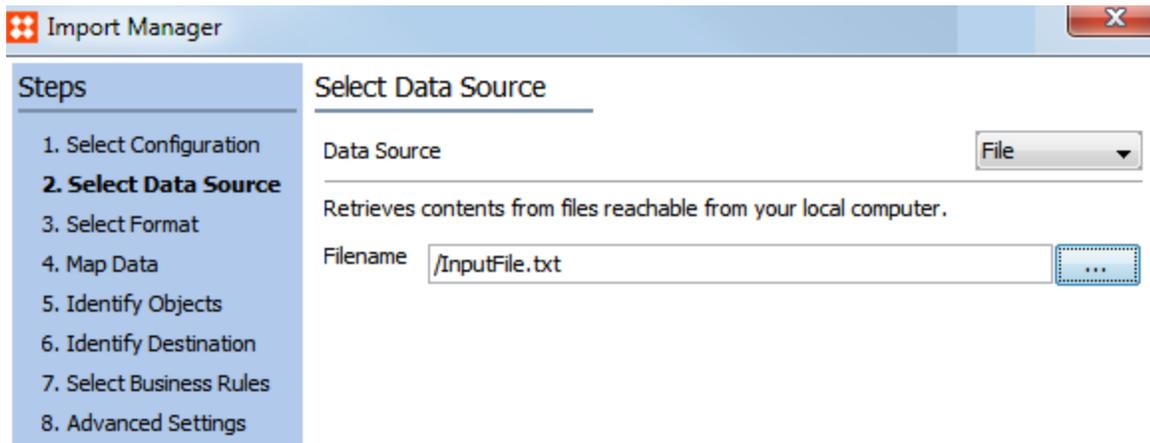


Linking Assets to Products using the Import Manager

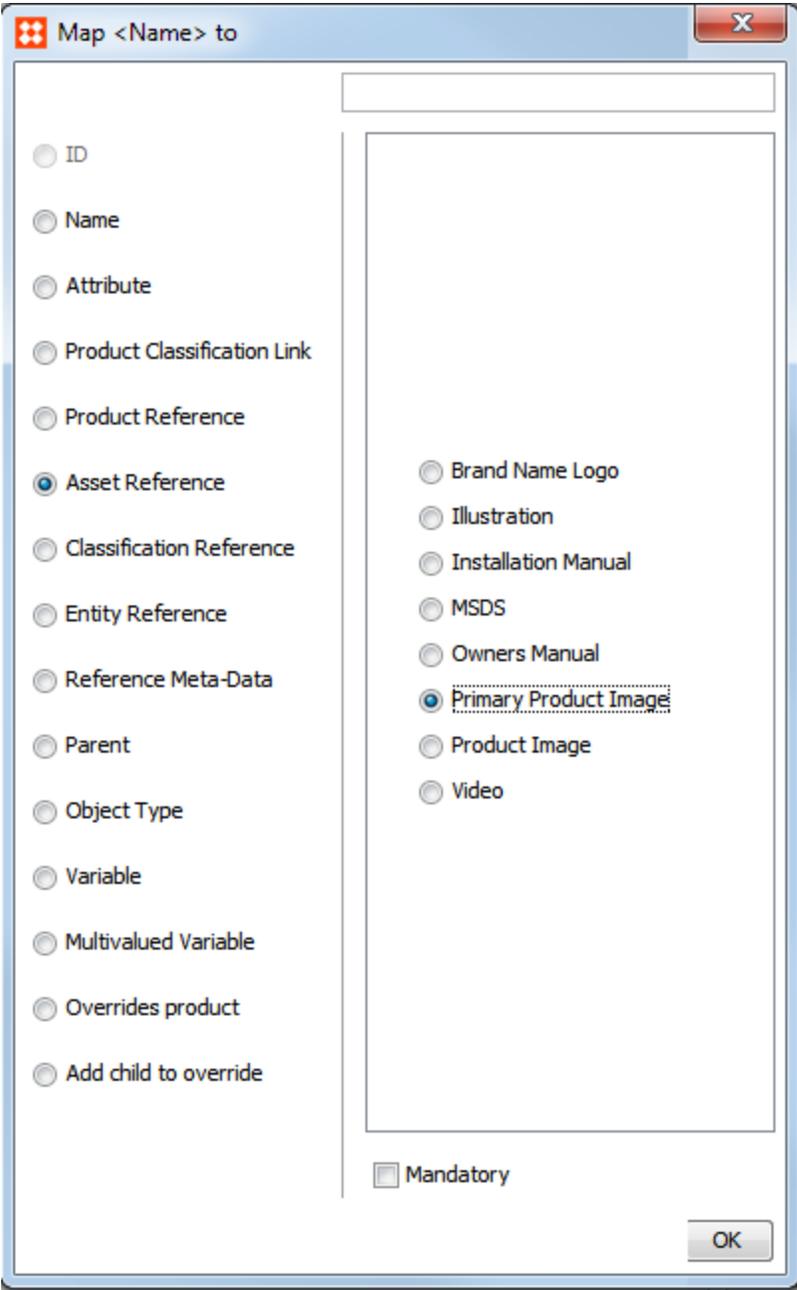
This method is best used for large amounts of products / assets linking. Ideally, you should already have a file in Excel that has the products and desired Image ID set up according to how you want them to be after import.

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

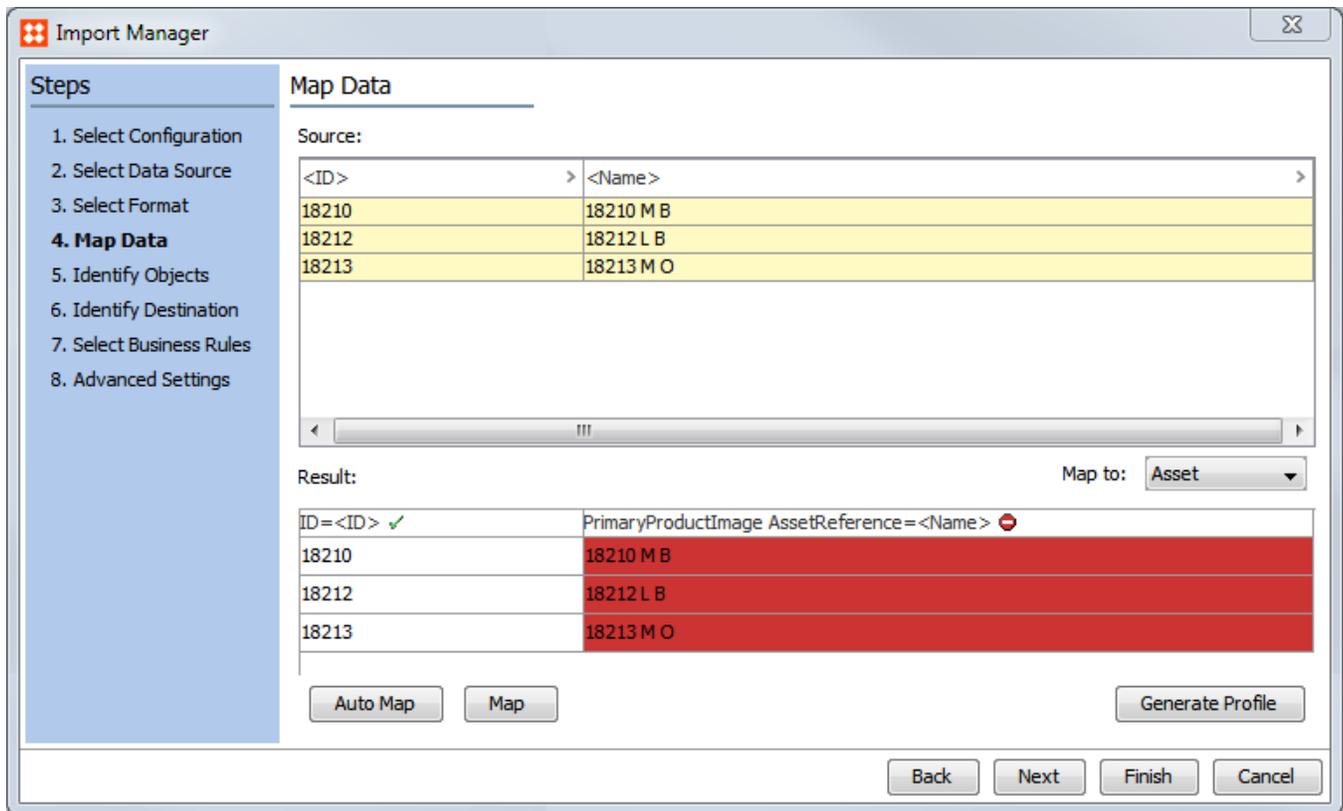
1. Go to **File** and select **Import**, then **Data**. An 'Import Manager' window will appear. On 'Select Data Sources', click on the breadcrumbs next to 'Filename' and select your file.



2. Proceed to the 'Map Data' step. Select a source column and click the **Map** button. Map the column holding IDs to 'ID', map the column holding the asset to be referenced to 'Asset Reference'. After selecting the 'Asset Reference' radio button, select the 'Primary Image' radio button. For more information on mapping, see **Inbound Map Data - Map** in the **Data Exchange** documentation.



- 3. Click OK to close the Map To dialog.
- 4. If the image IDs were not found or the import file data was not done correctly, then columns will appear in red. For information on input files, see **Asset Reference - Map Inbound** in the **Data Exchange** documentation.



Classifications

This topic covers information specific to the Classification super type that is important to know when working with classifications. For general object maintenance information (applicable to all object types rather than specific to classifications), see the **All Objects** topic within this guide.

Classifications are used to build hierarchies and objects that bundle other objects into organized groupings. For example, images, manuals, and icons could be uploaded to STEP as assets and stored in appropriate subfolders under the 'Assets' classification folder. Product objects could also be linked into classifications to provide alternative categorizations of objects that vary from the product hierarchy structure.

Classification Editor

The primary editor for classification objects is the Classification tab.

Description	
Name	Value
ID	22586
Name	T-shirts and Sweatshirts
Object Type	Web Level 3
Revision	0.3 Last edited by USERY on Mon Dec 26 07:24:26 EST 2016
Approved	✗ Last Approved on Mon Aug 08 10:59:21 EDT 2016
Translation	Not Translated
Path	Classification 1 root/Web Sites/Acme Retail Web Site/Apparel/Mens Casual/T-shirts and Sweatshirts
Visibility	
Landing Page Copy	ake

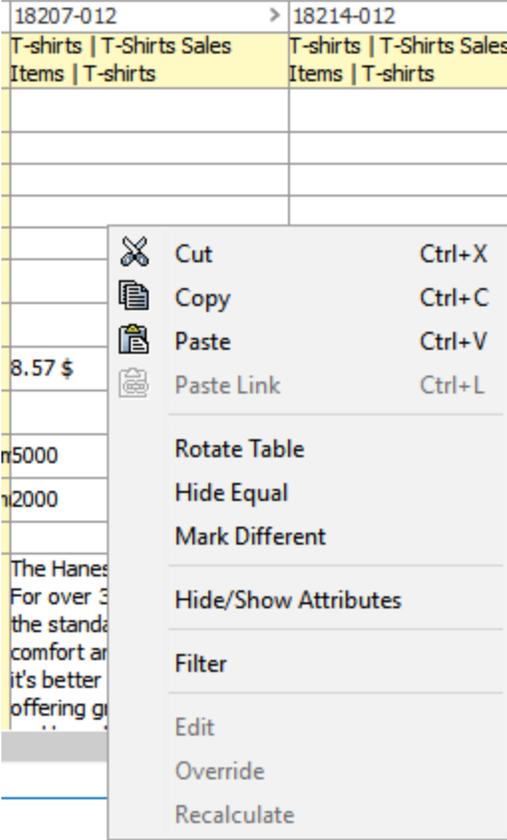
This tab will display all description attributes that are valid for the classification. Note that only description attributes are available on classifications (as opposed to products, which can also have specification attributes). More information on description attributes is available in the **Description Attributes** topic of the **System Setup / Super User** guide.

Sub Products

When on a classification, the Sub Products tab is used to display objects of the product super type that are linked into the classification via Product to Classification links. When the selected classification does not have product children (e.g., classifications used to house assets or configurations), the Sub Products tab does not provide any meaningful information.

	18207-012	18214-012	18215-012	18217-012	18217-054
ID	18207	18214	18215	18217	100305
Name	18207-012	18214-012	18215-012	18217-012	18217-054
Object Type	Sales Item	Sales Item	Sales Item	Sales Item	Sales Item
Revision	0.2 Last edited by USER o...	0.3 Last edited by USERL ...	0.4 Last edited by USERL ...	0.3 Last edited by USERL ...	0.22 Last edited
Path	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product Hierarchy...	Primary Product
Approved	✗ Last Approved on Mo...	✓ Approved or			
Translation	Not Translated	Not Translated	Not Translated	Not Translated	Not Translated
Completeness Score					
Category	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18207-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18214-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18215-012	Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18217-012	Classification 1 r... Web Sites Acme Ret... Apparel Mens... T-shirts and Swe...
Object Type	Sales Item	Sales Item	Sales Item	Sales Item	Sales Item
Parent	T-shirts	T-shirts	T-shirts	T-shirts	T-shirts
Product Variant Priority					
Released by					
Status					
URL					

Data can be edited on the products linked into a classification from the Sub Products tab by clicking directly into any editable field. Standard editing capabilities are available within this interface (as described in the **Editing Objects in Tree** topic within this guide), including copy / paste functionality using Ctrl + C and Ctrl + V. Right-clicking on any field within the table will expose additional options, including Copy, Paste, Hide Equal, and Mark Different selections - all of which are self-explanatory and can be especially useful when editing multiple objects.



Note that two views are available using the **Rotate Table** option. As shown above, the view can be organized to have attributes on the vertical axis. As shown below, the table can also display products on the vertical axis. Also note that right-clicking within the header field exposes different options than within the data fields, including options to add and remove products.

Classification	Sub Products	References	Referenced
View: Show all			
		ID	
Name	>	ID	
18207-012	>	18207	
18214-012	>	18214	
18215-012			
18217-012			
18217-054			

Hide

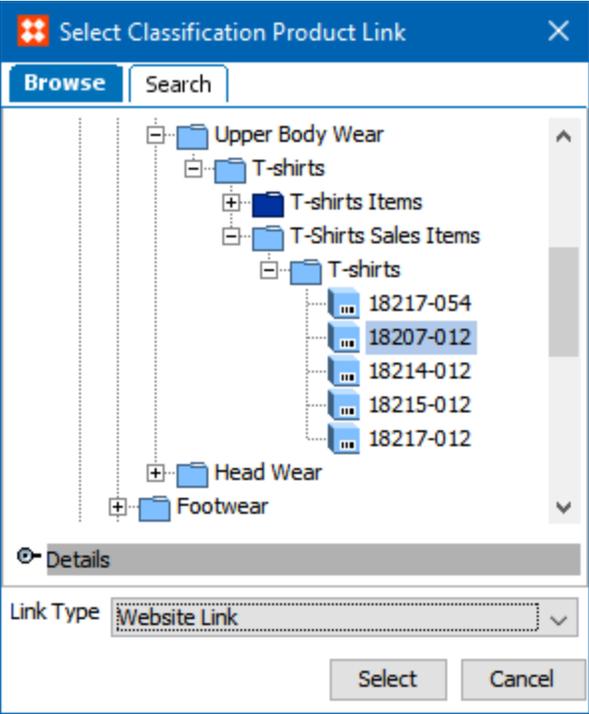
Show All Rows

Rotate Table

Add Product Ctrl+Plus

Remove Product Ctrl+Minus

Selecting **Remove Product** deletes the product to classification link between the objects, but does not delete the product itself. Selecting **Add Product** opens a dialog allowing the user to browse hierarchies to select a product to link, as well as specifying the link type to be applied.



Note that the same functionality is available using the **Add Product** link at the bottom of the Sub Products editor.

References

The References tab is where all references of which the selected object is the source can be viewed and edited (assuming proper privileges are in place). In addition, if the object has privileges applied, has objects visible in other contexts, or has any linked attributes, that information can be viewed (and in some cases edited) on this tab.

The display of the References tab on a classification will vary slightly from system to system, based on the data model. If the selected object has classification reference types for which the object is a valid source, those will appear on this tab, in addition to the default flipper options.

The screenshot shows the 'References' tab for the classification 'T-shirts and Sweatshirts rev.0.5'. The interface is divided into several sections:

- 1. Reference Flippers:** A section titled 'Display' containing a table with columns 'Reference Type' and 'Target'. A '+' icon is used to add references.
- 2. Ungrouped Classification References:** A section titled 'Ungrouped Classification References' containing a table with columns 'Reference Type' and 'Target'. A '+' icon is used to add references.
- 3. Applied Privileges:** A section titled 'Applied Privileges' containing a table with columns 'Applies to', 'Action Set', 'Attribute Group', 'Object Type', 'Group', 'Language', and 'Country'. A '+' icon is used to add privileges.
- 4. Visible Objects in Other Contexts:** A section titled 'Visible Objects in Other Contexts' containing a table with columns 'ID', 'Name', 'Attribute Groups', 'Mandatory', and 'Inherited from'.
- 5. Attributes:** A section titled 'Attributes' containing a table with columns 'ID', 'Name', 'Attribute Groups', 'Mandatory', and 'Inherited from'.

- 1. Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created to the object selected in the dialog from the currently selected object that you are standing on (e.g., current object = source, dialog selection = target). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.
- 2. Ungrouped Classification References:** The functionality here is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes. If *all* references that are valid for the selected object have been placed in attribute groups, the **Ungrouped Classification References** flipper will not be present.
- 3. The Applied Privileges** flipper allows users to apply privileges to the selected classification. Detailed information on creating and editing privileges is available in the Privilege Rules section of the System Setup / Super User guide.
- 4. The Visible Objects in Other Contexts** flipper displays subproducts that are visible in another context, which is only applicable if classification hierarchies have been set to be dimension-dependent in System Settings.

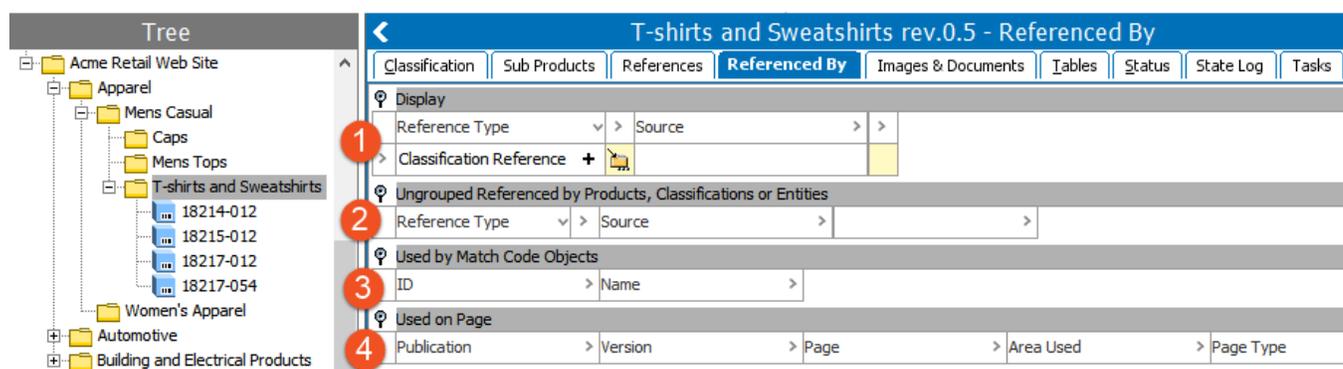
See the Classification Hierarchy Settings topic in the System Setup / Super User guide for detailed information.

- The **Attributes** flipper allows the user to view attributes linked to the classification, as well as to add new links using the **Link to Attribute** link. When attributes are linked to a classification, they are available to be populated on any objects of the product super type that reference the classification (assuming the attributes are also made valid on the applicable product object type). The exact columns available will depend on the data model and the attributes that have been made valid on the attribute links. Whether or not the various attributes are editable will also depend on the setup of the data model. However, an ID and Name field are always shown, with the attribute name being a hyperlink that can be used to navigate directly to the attribute. An Attribute Groups column is also present, displaying the attribute group(s) that the attribute is in. A Mandatory column is present and if checked, product objects that reference the classification cannot be approved until a value has been provided for the attribute. Note that mandatory settings on the attribute itself apply globally, while mandatory settings on the attribute link apply only to product objects that reference the classification at which the attribute is linked (or reference a classification that is inheriting the link). More information on mandatory settings is available in the Mandatory Attributes topic in the System Setup / Super User guide. If the attribute link is inherited (indicated by a green down arrow, , in the row indicator), the 'Inherited from' column will display the parental node where the attribute has been linked, which is hyperlinked for easy navigation. More information on linked attributes is available in the Inheritance in the Product Hierarchy topic within this guide and in the Attribute Links topic in the System Setup / Super User guide.

Referenced By

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). In addition, if the object is used by a match code or is used by any publication, that information can be viewed on this tab.

The display of the Referenced By tab on a product will vary slightly from system to system, based on the data model.



- Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking

the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.

2. **Ungrouped Referenced by Products, Classifications or Entities:** The functionality here is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
3. **Used by Match Code Objects:** If the selected object is the Category indicated in a match code, the match code will display here. For example:

The screenshot shows the 'System Setup' interface with a tree view on the left containing 'Match Codes and Matching Algorithms' and 'Find Similar'. The main window displays the 'Find Similar - Match Code' dialog box with tabs for 'Match Code', 'Match Code Values', 'Statistics', and 'Log'. The 'Definition' tab is active, showing a table with the following data:

Name	Value
ID	FindSimilar
Name	Find Similar
Last edited by	2017-01-24 12:34:34 by USER6
Category	T-shirts and Sweatshirts (22586)
Match Code Window Size	1

The screenshot shows the 'T-shirts and Sweatshirts' classification selected in the tree view, with two child objects listed: '18214-012' and '18215-012'. The main window displays the 'Used by Match Code Objects' dialog box with a table showing the following data:

ID	Name	Edited by
FindSimilar	Find Similar	2017-01-24 12:34:34 by USER6

More information on match codes is available in the Matching and Linking guide.

4. **Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the Publications section of this guide.

Images & Documents

The Images & Documents tab displays all assets that are child to the selected classification (e.g., all assets that are housed within that classification). Note that assets can be tied to classifications in two ways: as child products, or via image and document references. Assets are typically referenced to classifications only when the classification contains non-asset children for which the asset is relevant. In any case, assets referenced to classifications are *not* visible on the Images & Documents tab. This is in contrast to how the same tab functions for products, where the tab displays all assets referenced to the selected product. However, for the displayed assets (those that are child to the classification), the functionality available for interacting with the assets is the same as what is available for referenced assets on a product, which is described in the **Images and Documents Tab** topic in the **Products** section of this guide.

Tables

The Tables tab allows users to view and edit the tables defined for the object. Tables are generally used to present consolidated data across multiple objects, such as object name, part number, and price. For more information, see the **Tables** guide.

Status

The Status tab provides information about the status of the object, including revision history, translation status, and approval status. Products and classifications share a common Status tab, which is described in the **Status Tab** topic in the **Products** section of this guide.

State Log

The State Log tab displays the history of the selected object across all workflows. If the object has ever been in a workflow, a flipper is displayed per workflow and the history of transitions of the object within that workflow can be viewed. Detailed information on the State Log tab is available in the **State Log Tab** topic in the **Workflows** guide.

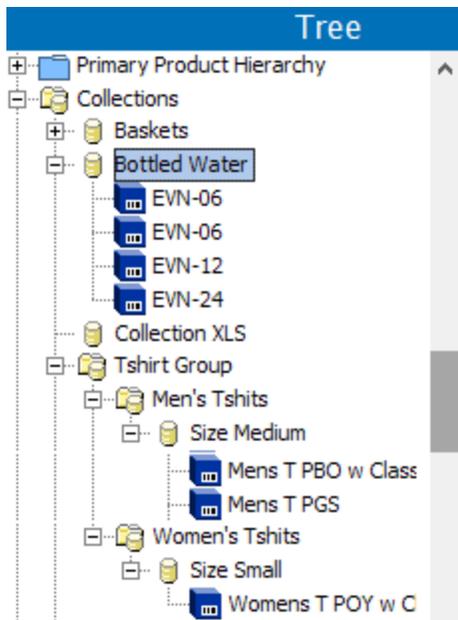
Tasks

The Tasks tab displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the **Moving Tasks through a Workflow in Workbench** topic in the **Workflows** guide.

Collections

Collections are containers for storing sets of objects from Tree and System Setup independently of their placement in the hierarchies. Objects in a collection can be updated, making collections a valuable tool for data maintenance tasks.

When multiple collections need to be grouped together, they can be put into a 'collection group'. Collection groups can also hold other collection groups. Collections and collection groups are found in the Collections hierarchy on the Tree tab. See **Creating Collections** or **Creating Collection Groups** in this documentation for more information on each topic.



For more on data maintenance in regards to collections and collection group, see the **Maintaining Collections** topic in this documentation.

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

Creating Collections

Collections can be created in two ways:

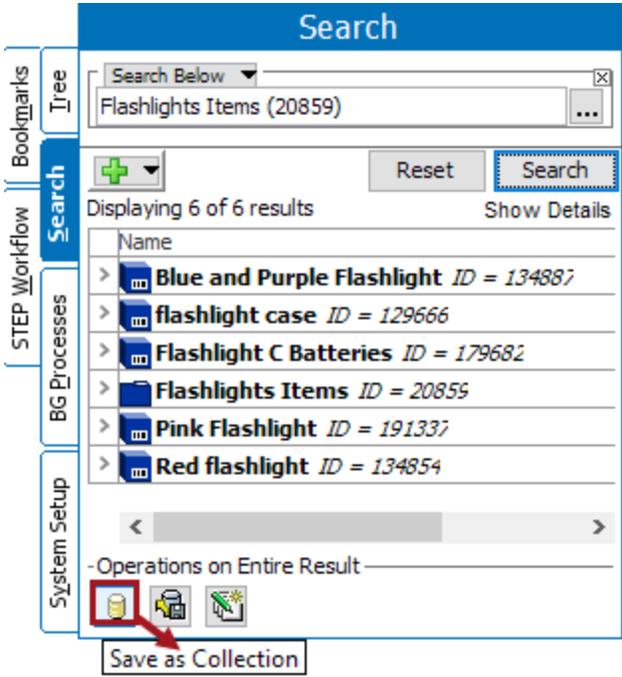
1. Using the Search tab, perform a search, and create a collection with the results
2. Using an import file

Regardless of how they are created, if a collection contains less than 10,000 objects, these can be inspected in the Tree hierarchy by expanding the Collection node. The collection will be displayed in an entirely flat structure regardless of any parent-child relations that may exist between the objects, and regardless of which parents / children the objects have when viewed elsewhere in STEP.

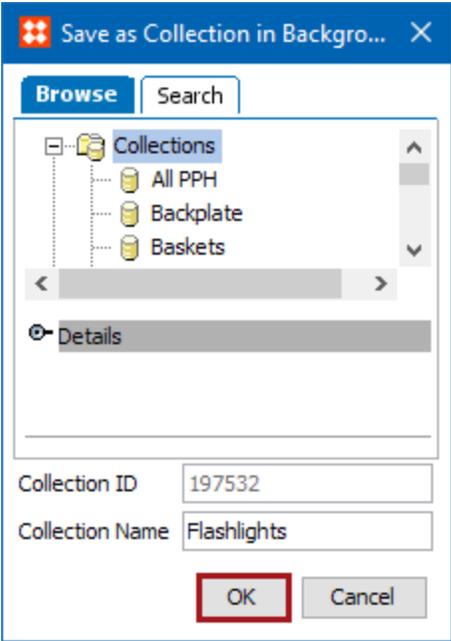
Creating a Collection from Search

The most common way to create a collection is through creating a search. To do so, follow the steps below.

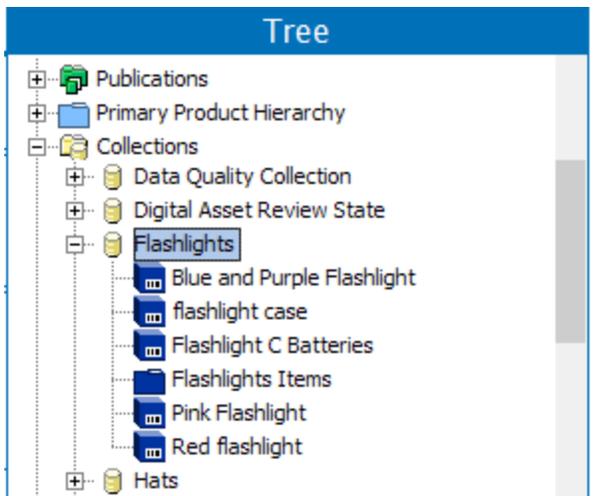
1. Navigate to the Search tab, enter in the needed search criteria, and click Search to verify the results. For more on how to search, see the **Navigation and Searches** topic in the **STEP User Guide / Getting Started** documentation.
2. Click the 'Save as Collection' button.



- 3. Next select the appropriate parent in the collections hierarchy (either the top collections folder itself, or a collections group folder), enter a collection name (the ID is autogenerated), and click OK.



- 4. A background process will run, and the new collection will be created and saved under the specified folder.



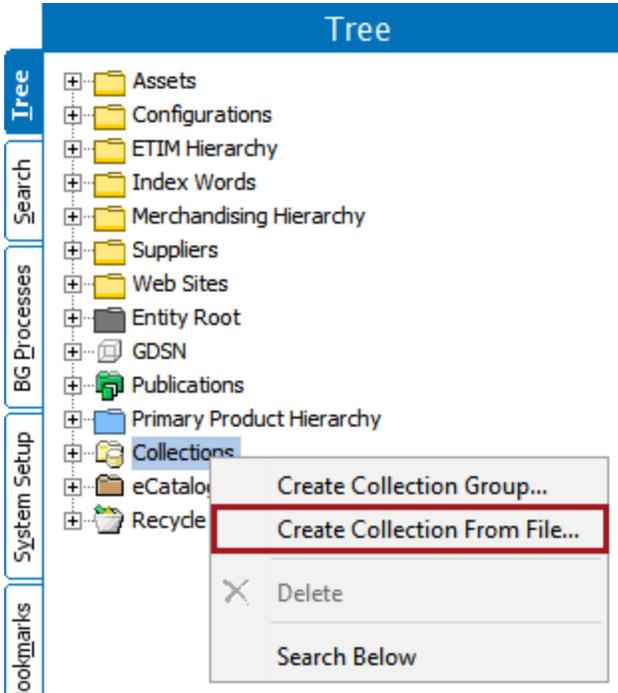
5. A user can now right-click the collection, and run any needed bulk update, or export the objects.

Note: The initial search criteria used to locate the included objects, is stored on the collection, which allows for later updates of the collection. To learn more about editing searches to update collections see the **Maintaining Collections** topic in this documentation.

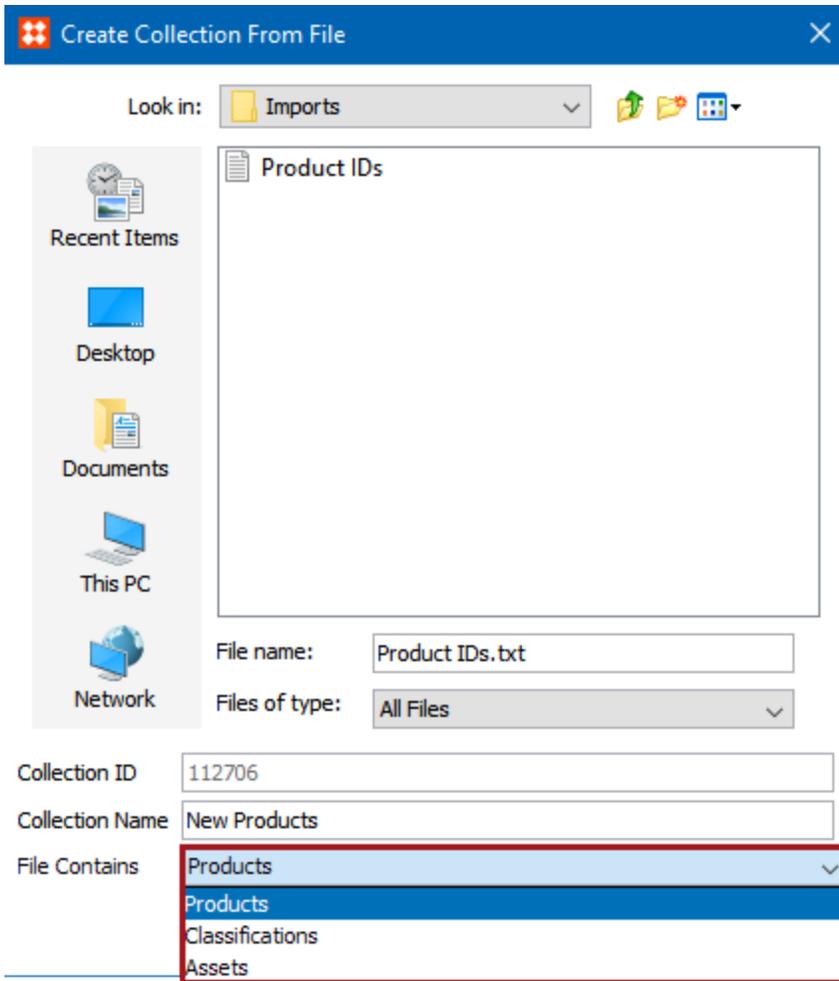
Creating a Collection from File Import

Collections can be created from a text or CSV import file containing separated STEP IDs of products, assets, or classifications. Objects in the import file must already exist in STEP as the import will not create or update objects, only place them in a collection.

1. To create the import, right-click the Collection top node or a collection group to determine where the new collection will live under. Then select **Create Collection From File...**



2. In the **Create Collection From File** dialog, locate the file to be imported.



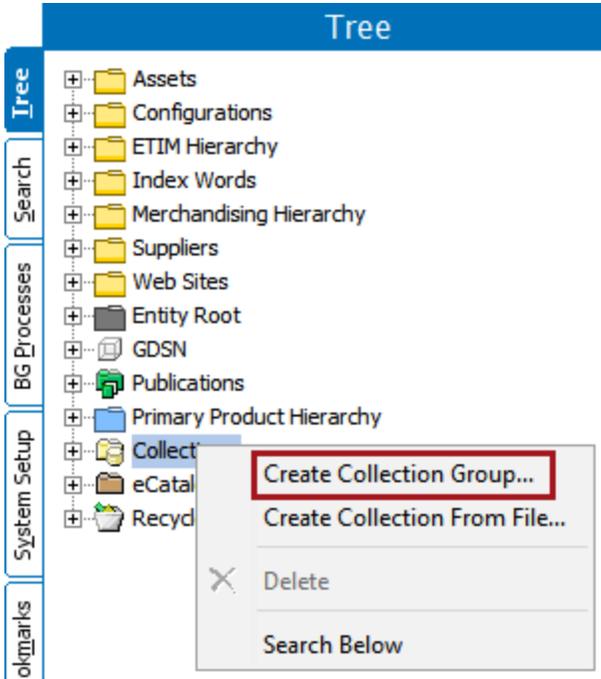
3. For the Collection Name parameter, add a Name for the new collection (IDs are autogenerated).
4. For the File Contains parameter, select if the import file contains IDs of products, assets, or classifications.
5. Click **OK** to start a background process which will create the new collection.

Creating Collection Groups

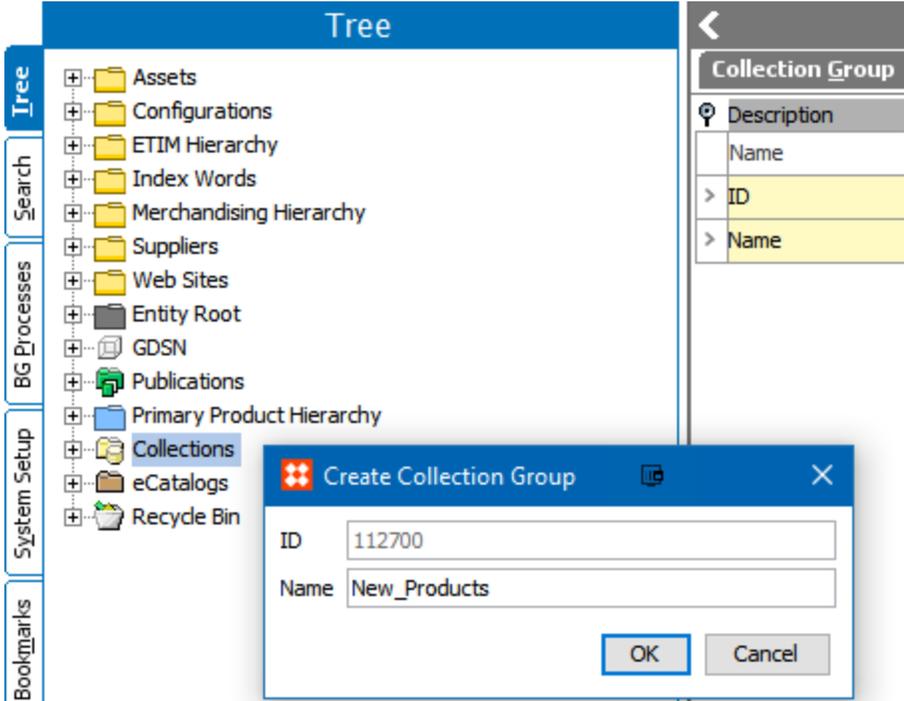
Collection groups are containers that can hold collections or other collection groups. Below are instructions for configuring collection groups.

Creating a Collection Group

1. Depending on where you want the collection group to live, either right-click the top-level Collections node or an existing collection group in Tree. Then select **Create Collection Group...**

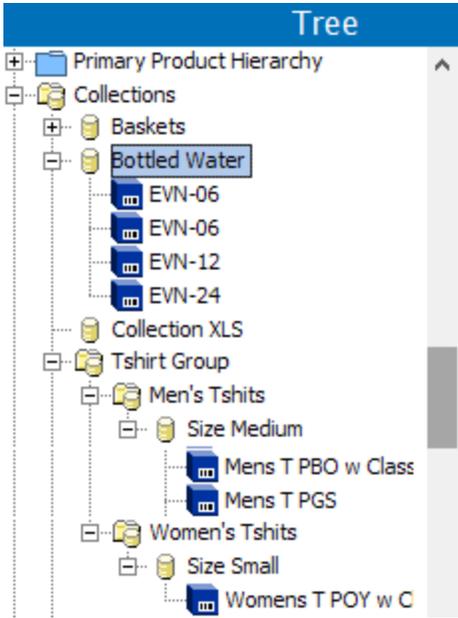


2. In the 'Create Collection Group' dialog enter a **Name** (ID is autogenerated) for the new group.



3. Click OK

Once created, collection groups can be selected to hold new collections, or more collection groups can be created under them. For more on how to create collections, see **Creating Collections** in this documentation.



Maintaining Collections

Collections can be a valuable tool for data maintenance tasks, because they allow a user to group objects independently of their placement in the hierarchies, and they can be updated. As an example, a set of objects with data anomalies could be grouped in a collection via search criteria. Once the data is corrected, the objects with updated information no longer meet the search criteria. Thus updating the collection automatically removes any updated / fixed objects from the collection. In this way, only the objects that still need to be fixed are displayed in the collection.

Below are various ways that users can interact with and maintain collections.

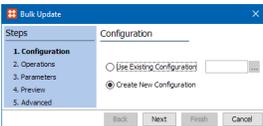
Run Bulk Update

This option allows the user to interact with the objects in the collection in a number of ways. To name a few, the objects could be submitted into a workflow, assigned to a user group, or have an attribute updated.

1. Right-click the desired collection and select Run Bulk Updates.



2. Complete the steps in the Bulk Update wizard to make the same updates to all objects in the collection.

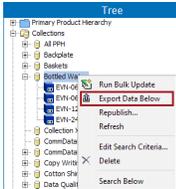


For more on how to use the bulk update wizard, and the various operations that can be applied to collections or a group of collections, see the **Bulk Update** documentation.

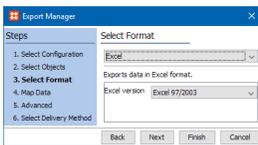
Export Data Below

The Export Manager wizard allows a user to export data on demand and to create or modify an export configuration.

1. If a user wishes to export all objects in the selected collection based on the selected format and the mapped data, they can right-click on the collection and select Export Data Below.



2. Selecting this option will launch the Export Manager where a user can fill out the proceeding steps as needed.



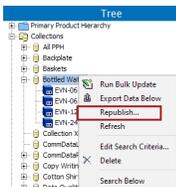
For more information on exporting, see the **Exporting Data** topic in the **Exporting Data and Assets** documentation.

Republish

The Republish action generates events on products, classifications, or assets in the collection. Common setup is to use this option for on-demand creation of a republished event. For example, to generate events for all objects in a collection that has never been published by an event queue.

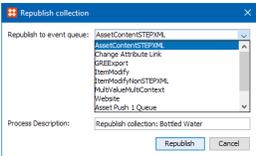
For more information on events, see the Events topic in the Superuser Guide / System Setup documentation.

1. To republish an event, right-click on the desired collection and select **Republish...**



Note: Users must have the privilege to maintain event queues in order to use this action.

2. Clicking the action launches a wizard where users can choose the appropriate event queue from the drop down menu.



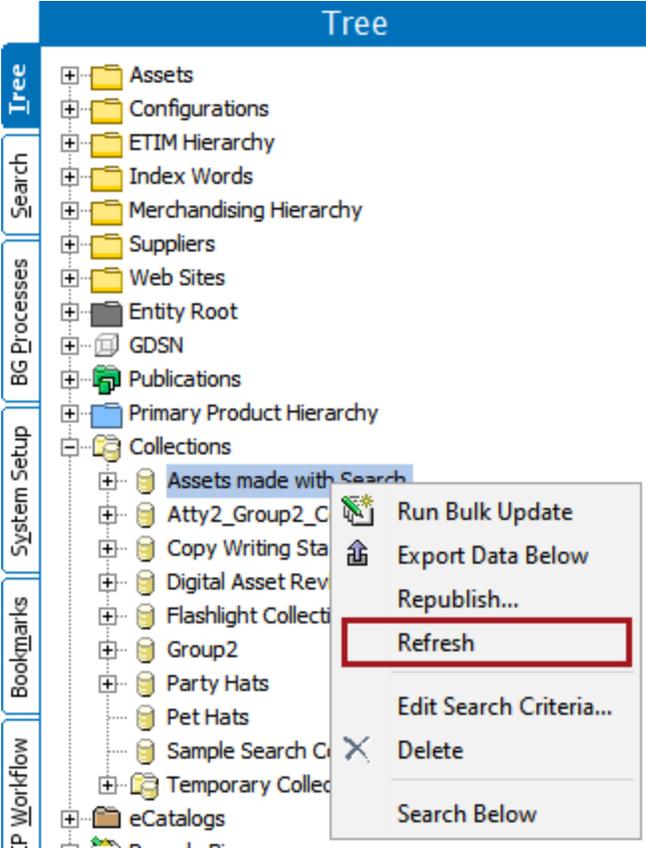
- 3. Users can also enter in a Process Description to give a name to the background process, which can be monitored in the 'Republish Node'.



Refresh Data

Collections created from search results can be updated for the most up-to-date information and object groupings, as objects in a collection that no longer meet the search criteria will be removed from the collection.

- 1. To start a refresh, right-click on the collection and select **Refresh**.



Note: The 'Refresh' option is *Only* available if the collection is created from a search.

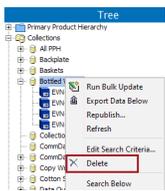
For more information on searches, see the **Navigation and Search** topic in the **Getting Started / STEP User Guide** documentation.

Delete

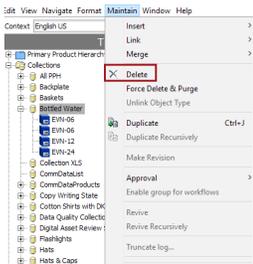
Clicking on the Delete option deletes the Collection node, but does not delete the objects within the Collection. They will still reside under their original nodes in Tree and System Setup. All collections and collection groups below a collection group must be deleted before the parent collection group can be deleted.

Important: If an object is deleted from the collection, then the same object will be deleted from the original hierarchy placement in STEP as well. In this case, it would be best to just updated the collection through proper maintenance of collections such as through an updated search or a bulk update.

To delete the collection node, right-click on the desired collection and select **Delete**.



Additionally collections and collection groups can also be deleted from the Maintain menu, **Delete** option.



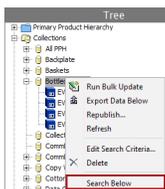
For more on creating searches, see the **Navigation and Searches** documentation.

For more on how to use bulk updates, see the **Bulk Updates** documentation.

Search Below

If a certain attribute on some of the items in the selected collection needed to be changed, a user could use this to locate the items.

When a user right-clicks on a collection and selects **Search Below**, it allows the user to search only the items in that particular collection.



See the **Search Below** topic in the **Getting Started / STEP User Guide** documentation.

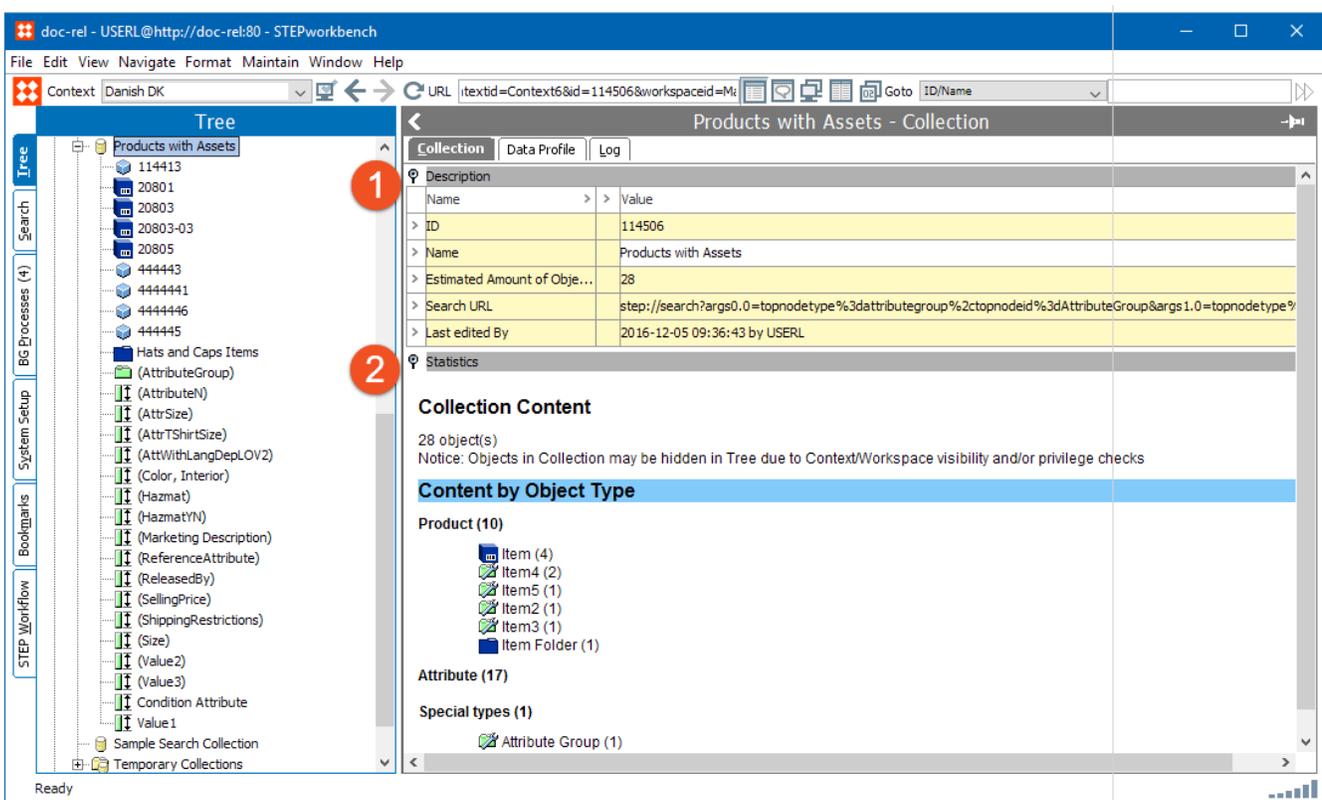
Collection Properties and Statistics

Working with and viewing the collections properties, collection statistics, Data Profile tab, or the Log tab can provide a quick overview of the collection itself, and useful information in regards to the objects it holds.

Collection Tab

The Description and Statistics flippers provide information about the selected collection. Below are the flippers described in more detail.

1. **Description:** This displays the Collection properties
2. **Statistics:** This displays the Collection Statistics



Description Flipper

The fields described below provide information about the collection:

Party Hats - Collection	
Collection Data Profile Log	
Description	
Name	Value
ID	111807
Name	Party Hats
Estimated Amount of Objects	4
Search URL	step://search?args0.0=topnodetype%3dproduct%2ctopnodeid%3d121189&search0.0=BelowCriteria
Last edited By	2016-08-22 11:53:40 by USER8
Statistics	

- **ID:** Shows the collection ID, which is auto generated.
- **Name:** Shows the name of the collection.
- **Estimated Amount of Objects:** Displays the total number of objects in the collection based on the latest 'Refresh' of the collection. The count is not filtered according to Context / Workspace visibility, privilege checks, or object types.
- **Search URL:** Displays *only* on collections created from a search result. A user can copy the URL, paste it into the URL field, press ENTER, and see the search in the Search tab. From here it is possible to edit the search if needed. For more on searching see the Navigation and Searches topics in the Getting Started / STEP User Guide documentation.
- **Last edited By:** Displays the date and time and user who last worked on the collection.

Statistics Flipper

The Statistics flipper gives an overview of which type of objects are included in the selected collection.

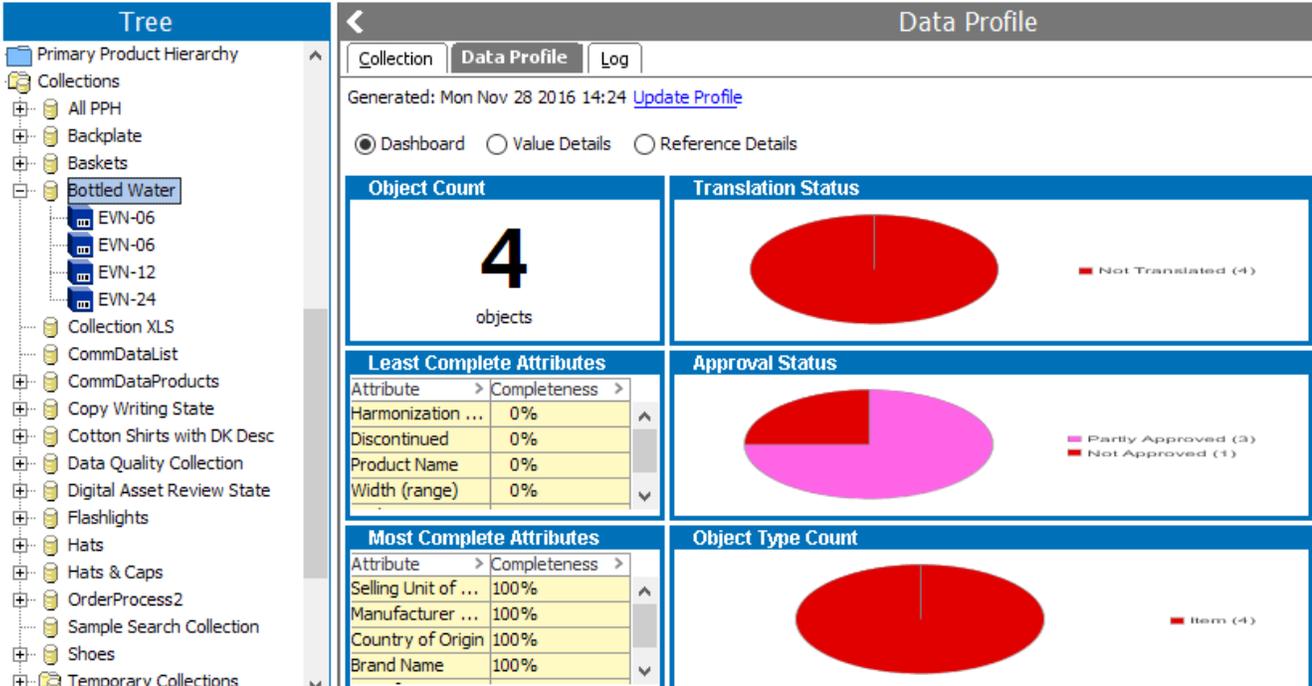
The screenshot displays the Stibo Systems interface. On the left is a 'Tree' view showing a hierarchy under 'Products with Assets' with various nodes like '114413', '20801', '20803', etc. The main area is titled 'Products with Assets - Collection' and has three tabs: 'Collection', 'Data Profile', and 'Log'. The 'Collection' tab is active, showing a 'Description' table with fields like ID, Name, Estimated Amount of Objects, Search URL, and Last edited By. Below this is a 'Statistics' section and a 'Collection Content' section showing 28 objects. A 'Content by Object Type' section lists: Product (10) including Item (4), Item4 (2), Item5 (1), Item2 (1), Item3 (1), and Item Folder (1); Attribute (17); and Special types (1) including Attribute Group (1).

Also, in addition to breaking down the objects by type, it will also tell the exact number of objects in the entire collection based on the latest 'Refresh' of the collection.

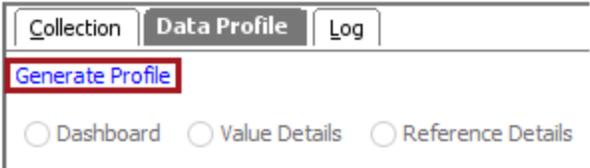
Note: While actually viewing the collection in Tree, it may appear that there are fewer objects in the collection than what is reported by the Estimated Amount of Objects field under the Description flipper or the total objects reported under the Statistics flipper. Examples of why this may happen could be because some objects are not approved for the workspace the user is currently in, and thus do not show, or it could be due to privileges.

Data Profile Tab

The Data Profile tab can display a dashboard to provide a graphical representation of the objects that are in the collection. This can be modified based on the user's requirement.



If a profile has never been created, a user can click on the **Generate Profile** link to create the collection's Dashboard.



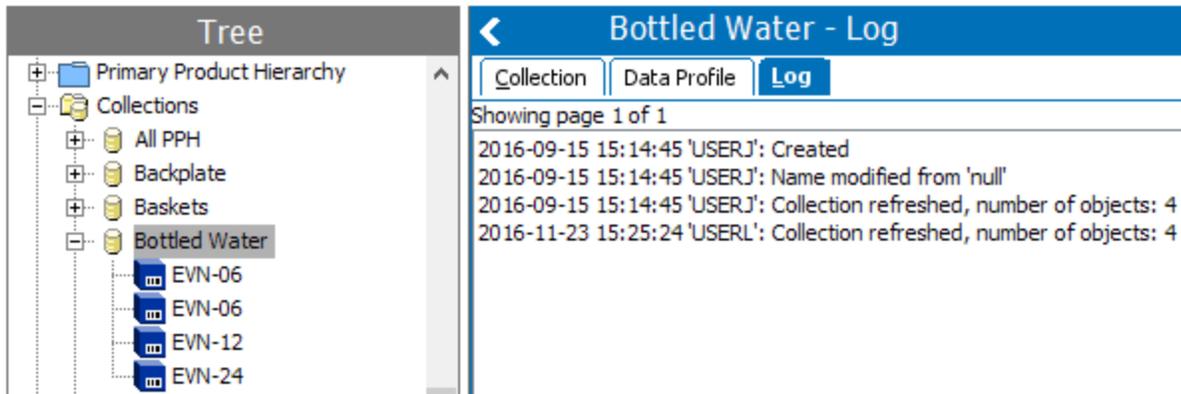
If it has already been created, it is recommended to update the profile when viewing if it has not been updated recently.



For more information on how dashboards and data profiling work, see the **Data Profiling** documentation.

Log Tab

The Log displays details about the creation and modification of the collection, details about which user performed what actions, and the number of objects in a collection when a collection is refreshed.



Entities

This topic covers information specific to the Entity super type that is important to know when working with entities. For general object maintenance information (applicable to all object types rather than specific to entities), see the **All Objects** topic within this guide.

A STEP entity can be any object not defined as a product. Entities are commonly used to model customer-related data, such as contacts, addresses, markets, or customers, though they can be used for any number of data modeling scenarios, including modeling of reference data.

Entities differ from products in that they do not contain all of the product-specific functionality like specification attributes, value inheritance, or tables. As entities can only utilize description attributes, the application of category-specific attributes is not supported. Therefore, attributes are applied to entities strictly via object type validity and all entity instances of a particular object type will have the same attributes available for population. Additionally, entities cannot be published in printed form (e.g. as part of print publishing solutions), nor can you translate entities using a background process.

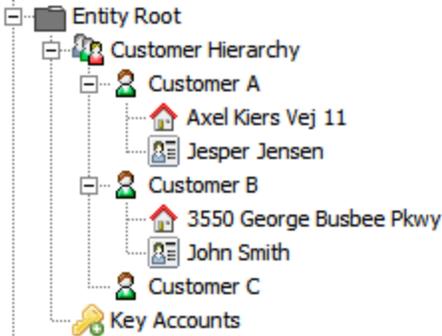
Entities may or may not be subject to approval, dependent upon the revisability settings (globally revisable entities are the same in the Main and Approved workspaces, while workspace revisable entities adhere to standard approval concepts). This provides a great deal of freedom in determining how entities are handled, specifically in terms of how events are generated and processed. For more information, see the **Revisability on Entity Object Types** section of the **Getting Started / STEP User Guide** documentation or the **Events** section of the **System Setup / STEP Super User Guide** documentation.

Entities cannot be linked into classifications, though configuration of entity references allows for determination of a hierarchical display (with source displayed as child to target, or vice versa). In effect, this makes classifications unnecessary for use with entities as entities can be classified via entities. Additional information on this is available in the **Reference and Link Types** section of the **System Setup / Superuser** guide in the **Using the Parent / Child Relationship with Entity to Entity References** topic.

However, entities do retain the standard data modeling capabilities and provide even more configurability. The Revisability parameter allows you to define an entity object type that does not have to be approved and also determines how events are processed.

Entity Hierarchy

Any number of entity hierarchies can be added to any system. For example, you may set up address hierarchies, customer hierarchies, market hierarchies, and so on. Entities are represented by icons chosen as part of the implementation process and will likely differ on each system. The following is an example of an entity hierarchy.



For more information on hierarchy setup, see the **Object Types and Structures** section of the **System Setup** documentation.

Entity Editor

Once the entity hierarchy is created and description attributes are applied to the entity object types, the next logical step is to start entering values.

Note: Only description attributes can be applied to an entity object types and will appear in the entity editor. Specification attributes are not allowed on entities.

The screenshot shows the 'Entity Editor' interface. On the left is a 'Tree' view showing the hierarchy: Entity Root > Customer Hierarchy > Customer A > Axel Kiers Vej 11. The main area shows a table for the 'Address' entity object type.

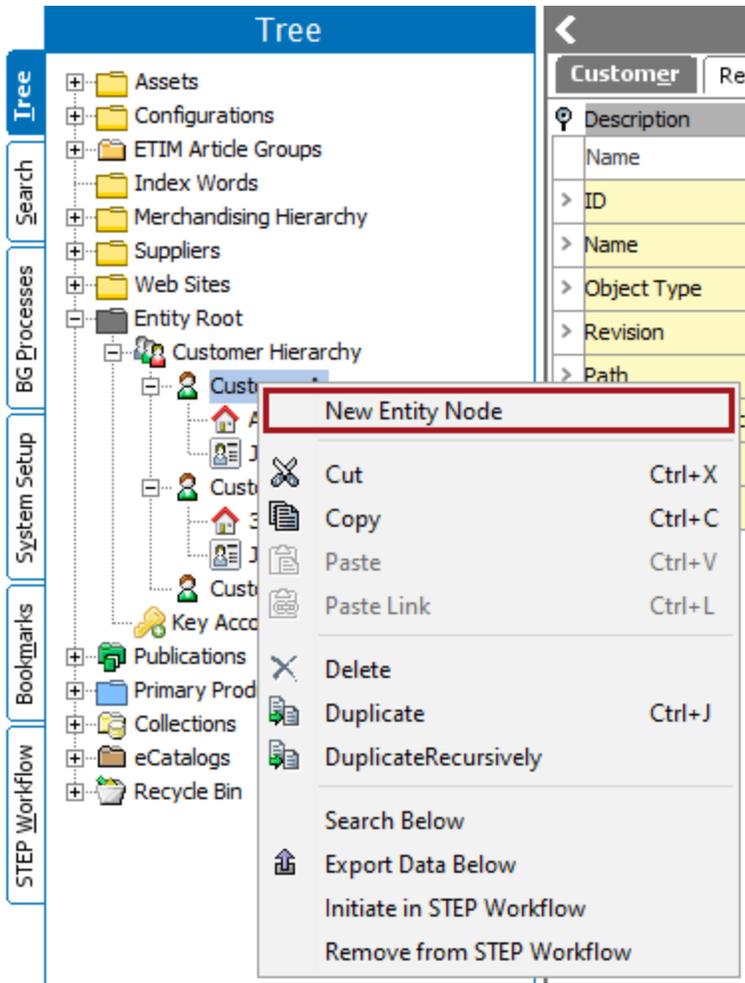
Address		References	Referenced By	Status	State Log	Tasks
Description						
Name	>	>	Value			
ID	>		ADD_101571			
Name	>		Axel Kiers Vej 11			
Object Type	>		Address			
Revision	>		0.1 Last edited by USER on Fri Aug 14 10:59:02 EDT 2015			
Path	>		Entity hierarchy root/Entity Root/Customer Hierarchy/Customer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

For example, the image above shows an entity modeled as an address. The entity object has several description attributes: City, Country, State, Street, and Zip. In addition to the Name attribute, these attribute can be modified and maintained. Since this entity object type has been modeled to be globally revisable, approval is not applicable. Therefore, the Approval Status field is not shown.

Creating, Deleting, and Editing Entities

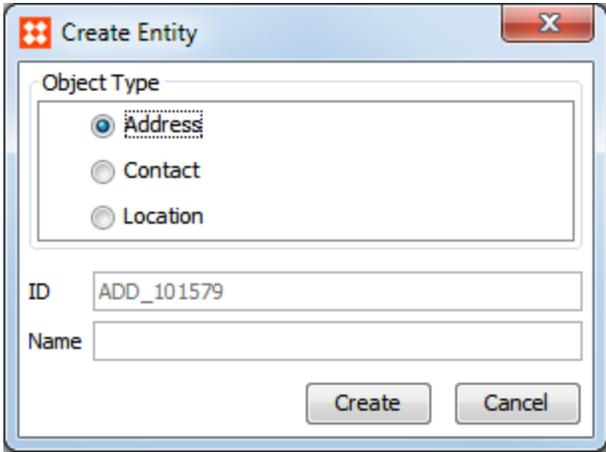
Creating New Entities

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



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

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



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

Deleting Entities

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

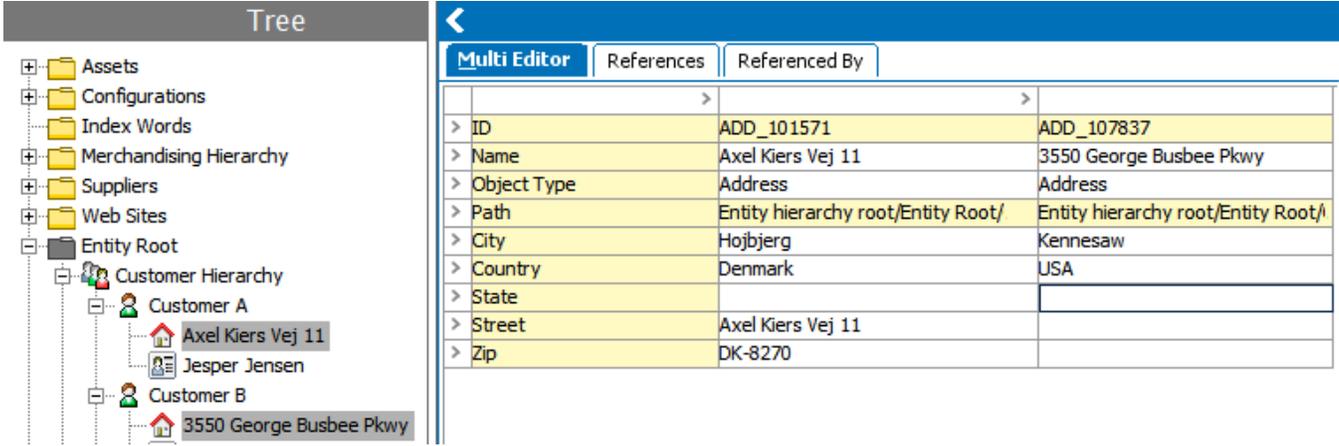
Editing Entity Values

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

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

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

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



2. Type in the appropriate values in each cell.

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

Entity References, Referenced By, and Status Tabs

References Tab

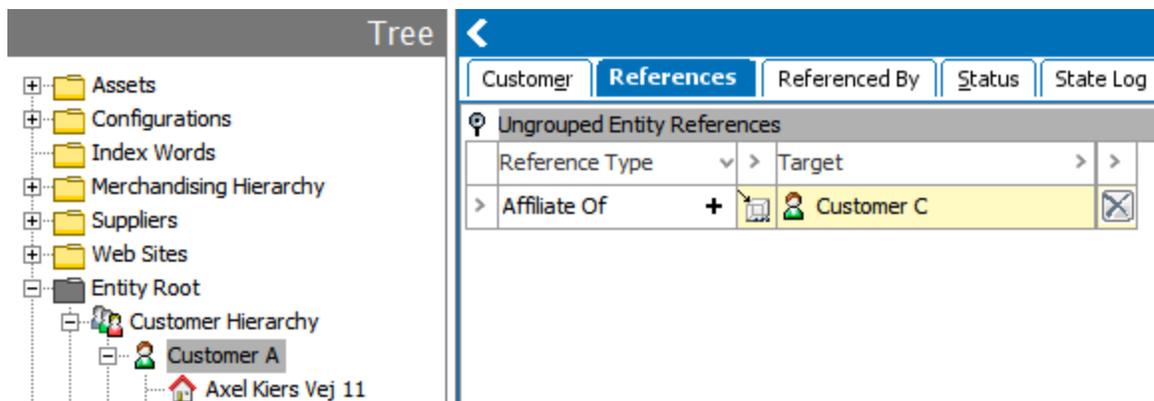
Selecting the References tab on an Entity Object will list valid References. In this tab it is possible to maintain references from the selected entity to other objects.

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

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

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

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



Referenced By Tab

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

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

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

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

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

Reference Type	Source
Affiliate Of	Customer A

Status Tab

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

Revision	Created	Edited	Major	User
0.1	Thu Jul 30 14:53:26 EDT 2015	Fri Aug 14 10:58:36 EDT 2015		USER

Products

This topic covers information specific to the Product super type that is important to know when working with products. For general object maintenance information (applicable to all object types rather than specific to products), see the **Object Maintenance in Tree** topic within this guide.

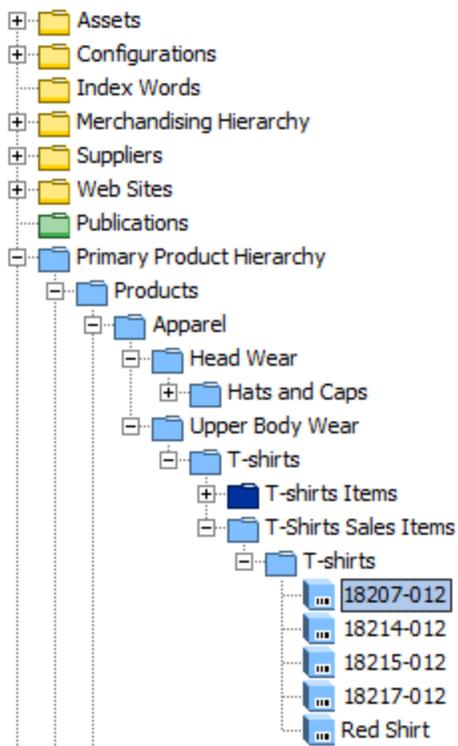
In STEP terms, a product is a part number, a stock number, an order number, a catalog number, a product number, etc. In other words, any orderable item that a company sells.

Product Hierarchy

The foundation for a product-centric STEP installation is the Product Hierarchy / Primary Product Hierarchy. The product hierarchy consists solely of objects of the product super type. The product hierarchy is an organized hierarchy where all products in the workbench are stored. This is also where products and product attributes are linked. Although configurable, the product hierarchy is usually a multi-level hierarchy—each level controlled by its own unique object type. Superusers can control the naming convention(s) used to categorize the products at their different levels.

Inheritance of attributes and values is supported within the Product Hierarchy and the hierarchy is usually designed to take advantage of this capability, with objects classified according to similar characteristics. More information on inheritance is available in the **Inheritance in the Product Hierarchy** topic in this guide.

A portion of a sample hierarchy is shown below. Categories are represented by folder icons, while discrete objects are represented by cubes.



All objects of the product super type must exist in the product hierarchy, and may exist only once (e.g., each object can have only a single parent). The primary purpose of the product hierarchy is proper attribution of products. That is, in the product hierarchy, products should be grouped according to their similar properties so that inheritance of attributes, attribute values, and references can best be used. Based on this, it is evident that the Product Hierarchy is not intended to be used for modeling website hierarchies or other taxonomies (e.g., merchandising hierarchy, sales hierarchy, etc.) where an object can be represented multiple times. When a product needs to "live" in more than one location, that can be accomplished using classification hierarchies. In this case, the product continues to exist in the product hierarchy (and this is considered its true place of residence). It is then linked into one or more classification hierarchies using references.

Product Editor

The Product Editor is displayed when an object of the product super type is selected in Tree.

The screenshot displays the Product Editor interface. On the left is a 'Tree' view showing a product hierarchy. The main area is titled '20808-013 rev.0.7 - Product' and contains several tabs: Commercial, Tables, Category Profile, Proof View, Status, State Log, and Tasks. The 'Product' tab is active, showing a table of product details. A 'Description' flipper is expanded, showing a table with columns 'Name' and 'Value'. A primary image of an orange cap is displayed. Below the description are sections for 'Manufacturer Information', 'Category Specific Attributes', and 'Attribute Group'. A 'Display' flipper is also expanded, showing a table of product attributes. Red callouts 1-5 point to the Product tab, Description flipper, primary image, Category Specific Attributes flipper, and the Selling Price attribute, respectively.

Name	Value
ID	101567
Name	20808-013
Object Type	Sales Item
Revision	0.7 Last edited by USER6 on Wed Jan 18 08:38:58 EST 2017
Approved	✗ Last Approved on Mon Aug 10 09:47:21 EDT 2015
Translation	Not Translated
Path	Primary Product Hierarchy/Products/Apparel/Head Wear/Hats and Caps/Ha...
Category	fx Primary Product Hierarchy Products Apparel Head Wear Hats and Caps Hats and Caps Sales Items 20808-013 20808-013
Parent	fx Hats and Caps Sales Items

Name	Value
Manufacturer Name	abc
Product Width	t23
Product Height	t23
Selling Price	t23 12.99 \$
Product Depth	t23
Annual Sales Forecast, Maxim	t23 250
Annual Sales Forecast, Minim	t23 100
Description, Long	abc 100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric Undervisor, Matching Fabric Adjustable Hook and Loop Closure, One size fits most.

1. The **Product** tab (known as the Product Editor) is the primary interface for working with product objects in the workbench.
2. The **Description** flipper displays basic information about the object. Additional information about the data displayed here is described in the Editing Objects in Tree topic within this guide. Note that some information displayed is common for all implementations, while other information is specific to the data model and configuration of each system.
3. If the object has a **primary image** referenced, a thumbnail version of it will display. The reference type to be used for the thumbnail display is controlled in System Settings (on the Users & Groups node), and additional information on this is available in the Primary Image Type topic in the System Setup / Super User guide. Additional information on references in general is available in the Reference and Link Types topic in that same guide.
4. **Specification attributes** are displayed in flippers, with the flipper name matching the attribute group. Flippers can be expanded / collapsed by clicking the magnification icon. Note that when attribute groups have sub-groups, configuration determines whether the parent group or the child sub-group is displayed as the flipper name. This is set via the 'Product Editor, Group attributes by top group' parameter in System Settings (on the

Users & Groups node), and additional information on this is available in the Product Information Manager Default Settings topic in the System Setup / Super User guide. More information on attributes in general is available in the Attributes section in that same guide.

5. Attribute values can be edited by clicking into any editable field. Additional information on the various editing options is available in the Editing Objects in Tree topic within this guide. By default, attributes are displayed in alphabetical order within each flipper. However, if an attribute display sequence has been configured, this will override the alphabetical sorting. More information on attribute display sequence is available in the Attribute Display Sequence topic in the System Setup / Super User guide.

Additional Editors

See the additional topics listed below for information on the other editors available on products.

- **Category Profile:** Allows users to configure and view profiling data and dashboards for the objects under the selected node. See the **Data Profiles** topic in the Data Profiling documentation for more information.
- **Commercial:** Allows users to add and edit commercial terms for the object. Commercial data / terms lists are often used to store pricing information. See the **Commercial Data** guide for more information.
- **Images & Documents:** Allows users to view and edit assets referenced by the object (or inherited from parental objects). See the **Images & Documents Tab** topic within this guide for more information.
- **Product Variants:** Allows the user to generate and manage a family of products, which are basically the same, only varying on the values of a small sub-set of their attributes. For example, clothing and shoes both offer good use cases for product variants as shoes or clothing items may come in multiple sizes and colors, but are otherwise identical. The product family holds all data for the item, e.g., a particular shoe, while the variants would hold only the various combinations of the color and size varieties (e.g., size 7 red, size 8 blue, etc). The Product Variants tab is only present if the system has been configured to support variants. For more information on this, see the **Product Variants** documentation in the System Setup / Super User guide.
- **Proof View:** Allows users to preview a close representation of how a product will look when mounted onto an InDesign page based on a selected publication version and product template. For more information, see the **Generating Proof Views** topic in the STEP'n'design documentation.
- **Referenced By:** Allows users to view all objects referencing the current object, and add / remove / edit these references. See the **Referenced By Tab** topic within this guide.
- **References:** Allows users to view all objects that the current object references, and add / remove / edit these references. See the **References Tab** topic within this guide.
- **State Log:** Allows users to view the recent history of the object across all workflows in which it has been entered. See the **State Log Tab** topic in the Workflows documentation for more information.
- **Status:** Allows users to view basic information about the object, including revision history, translation status, and approval status. See the **Status Tab** topic within this guide for more information.
- **Sub Products:** Allows users to view and edit all child objects of the selected object in a table form. See the **Sub Products Tab** topic within this guide for more information.

- **Tables:** Allows users to view and edit the tables defined for the object. Tables are generally used to present consolidated data across multiple objects, such as object name, part number, and price. For more information, see the **Tables** guide.
- **Tasks:** Displays all active tasks across all workflows for the selected object, subject to the user's privileges (only tasks that the user has the rights to address are visible). When relevant tasks and privileges are in place, the user is able to act on the tasks from this editor, including to edit data and move tasks through the workflow. More information on the Tasks tab is available in the **Moving Tasks through a Workflow in Workbench** topic in the Workflows guide.

Inheritance in the Product Hierarchy

Inheritance in STEP is the concept that when the value of an attribute is defined in a parent product, all the child products that exist under the parent product can inherit the value - meaning that the value is present on the child, as well as the parent. If the attribute is also valid on the child (in addition to the parent), then the value can be locally edited on the child (e.g., a different value supplied so the child no longer inherits the value from the parent). Note that value inheritance also applies to references, meaning that if a reference is populated on a parent, it is also available on the child in the same way as an attribute value. However, references must be explicitly configured for inheritance to be in place, while attribute values will automatically inherit to child products.

In addition to value inheritance, attribute inheritance is also available in the product hierarchy. This means that attributes can be linked to specific nodes / categories so they only appear for those categories and their children. For example, consider a company that manages data for both batteries and clothing. Size might be applicable to both categories of objects since both batteries and apparel have sizes assigned. However, sleeve length and voltage are characteristics applicable for clothing and batteries, respectively, and it could be confusing to see a 'Voltage' attribute on a clothing item. To avoid this, the 'Voltage' attribute could be linked to the 'Batteries' category, while the 'Sleeve Length' attribute could be linked to an 'Upper Body Apparel' category.

Inheritance perpetuates throughout the hierarchy, no matter how many levels are present (e.g., inherited attributes and values appear on children, grandchildren, etc.). When attributes are considered applicable to all products, regardless of category, they are called 'global attributes'. For example, attributes such as Price, Description, and Manufacturer Name. Thus, these attributes are linked to the top level in the product hierarchy and are inherited down to all products beneath, no matter how many levels there are.

Attribute inheritance only means that the attributes are *available* for all of the products beneath where they are linked. The process of linking attributes to different levels does not have anything to do with the actual values that will go into the attributes for any particular product. In the 'Voltage' example, when linking that attribute, you are only concerned with making that attribute available to all the battery products—not with the actual voltage for any given product. However, if many batteries under a parent shared the same value, the value could be populated on the parent to inherit down to the children. Any children varying from the parent value could then be edited individually, while those having the same value as the parent do not need to be updated further. Note that attribute inheritance within the product hierarchy is only available with specification attributes, and is not available with description attributes. Further note that this topic focuses on inheritance solely within the product hierarchy. However, it is important to be aware that attribute inheritance can also be used within classification hierarchies that are used to organize product objects. Attributes can be linked to a classification, making them available for all products linked into that classification (or a child classification). More information on attribute inheritance with classifications is available in the **Classifications** topic within this guide, and within the **Attribute Links** topic in the **System Setup** guide.

Important: Value inheritance is a powerful feature, but care should be taken not to maintain values at a level too high in the hierarchy. With such a setup, a single change could mean that thousands or millions of products would have to be updated in downstream systems and many systems are not geared to handle massive feeds like that.

When working with products and/or creating new products, users should be mindful of inheritance, considering both the inheritance of the available attributes, as well as their specific values or references. It may be helpful to consider the following:

- Is the hierarchy granular enough to allow products within the category to be grouped so that all products only have the relevant attributes, or are additional category levels required to obtain this granularity?
 - Which attributes are required for the products in the category and/or subcategories?
 - If product variants are used, which attributes should be maintained at the family level and which ones should be maintained at the variant level?
-

Note: Data can also inherit from dimensions (e.g., language or country). More information on this is available in the **Dimension Dependent Data** section of the **Contexts** topic in the **System Setup / STEP Super User** guide.

Linking Attributes to Products

To make attributes valid for products, they must be linked to the appropriate tree nodes in the product hierarchy. Some attributes will be global attributes (applicable to all objects in the product hierarchy) and are linked to the "Product Hierarchy" root node. These global attributes are then valid for all products. Other attributes apply only to specific categories of objects, and are then linked directly to those categories, making them available for all objects within that category (if also set as valid for those object types). Attributes should not be linked to individual leaf objects, as each one would have to have the link individually applied. Instead, attributes should be linked to some parental folder in the hierarchy above the objects needing to use the attribute.

Before proceeding, be aware of the following:

- Attributes can be linked to objects of the product or classification super type. In either case, the steps are comparable and the attributes are made available for the children "under" the node at which they are linked (being mindful that "under" means "actual children" in the product hierarchy, whereas it means "objects with a reference to" when dealing with classifications).
- Linked attributes apply only to objects of the product super type. For example, linking attributes to a classification object that holds assets does not make those attributes available on the child assets.
- Only Specification attributes can be linked to products or classifications. Description attributes cannot be linked attributes.

Linking Attributes

1. Select the product group or classification and click the **References** tab.
2. Expand the appropriate flipper (**Linked Attributes from Product Hierarchy** on product objects or **Attributes** on classification objects), then click **Link to Attribute**.

Product	Sub Products	References	Referenced By	Images & Documents
Discontinued Product Maintenance				
Image References				
Sales Item References, Classification				
Sales Item References, Product				
Index Words				
Publications				
Linked Attributes from Product Hierarchy				
ID		Name		
✔ AirTransportationRestrictions		Air Transportation Restrictions		
✔ AnnualSalesForecastMaximum		Annual Sales Forecast, Maximum		
✔ AnnualSalesForecast,Minimum		Annual Sales Forecast, Minimum		
✔ AvailabilityEnd		Availability End		
✔ AvailabilityStart		Availability Start		
✔ BaseUnitOfMeasure		Base Unit of Measure		
✔ BrandName		Brand Name		
✔ BrandOwner		Brand Owner		
✔ Color		Color		
✔ Cost		Cost		
✔ CostEffectiveDate		Cost Effective Date		
✔ CostExpirationDate		Cost Expiration Date		
✔ CountryOfOrigin		Country of Origin		
✔ DescriptionLong		Description, Long		
✔ TaxClassification		Tax Classification		
✔ TshirtSize		T-shirt Size		
>		Link to Attribute		

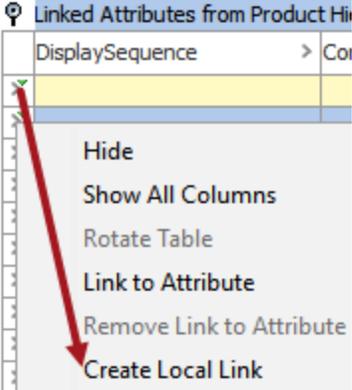
Classification	Sub Products	References	Referenced By
Ungrouped Classification References			
Reference Type	>	Target	>
> Related Web Cla...	+		
Applied Privileges			
Applies to	>	Action Set	>
	>	Attribute G...	>
	>	Object Type	>
Add Privilege			
Visible Objects in Other Contexts			
Attributes			
Completeness Score	>	ID	
>		Color	
>		Link to Attribute	

3. In the standard search / browse window that displays, locate the appropriate attribute(s) and click **Select**.

Localizing an Attribute Link

Local attribute links can be created to override inherited attribute links.

1. Select any existing inherited attribute link and right-click on the row indicator.
2. Select the **Create Local Link** option.



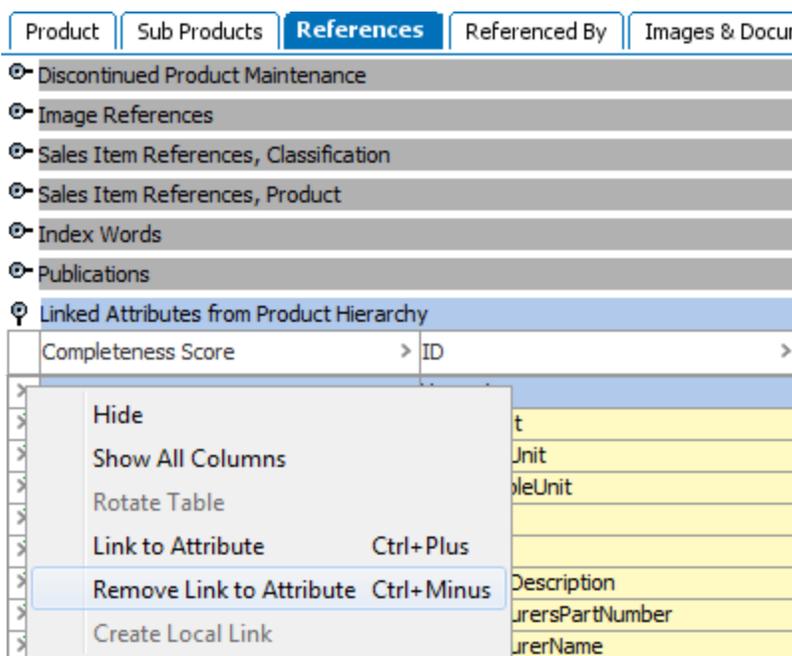
This creates a local version of the link where attributes on the reference can be locally edited. Local links are removed the same way as inherited links, though removing a local link simply re-applies the inherited link.

Unlinking a Linked Attribute

Unlinking an attribute does *not* delete the attribute from STEP; it simply removes the link so the attribute is no longer available for population on the selected node (and child nodes, if applicable). Note that attribute links must be removed from the same node to which they were added. In other words, trying to remove an inherited attribute link is not possible and the 'Remove Link to Attribute' option will be disabled. To remove an inherited link, it must be removed on the parental object that holds the link. However, care should be taken in doing this as it will remove the link for *all* child groups, and will need to be re-linked at those lower child levels if it is still needed there.

1. On the References tab of the object, expand the appropriate flipper (**Linked Attributes from Product Hierarchy** on product objects or **Attributes** on classification objects).
2. Right-click on the row indicator and select **Remove Link to Attribute** from the context menu (or use Ctrl + "-"). Multiple attributes can be unlinked simultaneously by multi-selecting.

Note: If an attribute has been linked locally, removing the link only removes the local link, and the inherited link will again take effect.



Additional methods for maintaining attributes links

Attribute links can be added and removed in a number of ways, in addition to what has been described above. These include:

- **References** tab of the attribute itself
- **Maintain > Link** menu when a product or classification is selected
- **Edit > Link to Attribute / Remove Link to Attribute** menu when a product or classification is selected

All methods for adding and removing attribute links are equivalent, producing the same end result.

Working with Inherited Values

There are many advantages to setting common values:

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

As mentioned above, it is possible to set attribute values for an individual product, but consider a situation where all products within a product group share common attribute values. For example, a set of hats that share a common description and features.

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

20808-013 rev.0.7 - Product		
Product		
Sub Products		References
Referenced By		
Display		
Name	>	Value
> Manufacturer Name	abc	
> Product Width	123	
> Product Height	123	
> Selling Price	123	12.99 \$
> Product Depth	123	
> Annual Sales Forecast, Maxim	123	250
> Annual Sales Forecast, Minim	123	100
> Description, Long	abc	100% Cotton, Unstructured, Soft Crown, Low-Fitting, 6-panel cap, Seamed Front Panel without Buckram, 6 Rows Stitching on Visor, Matching Fabric Undervisor, Matching Fabric Adjustable Hook and Loop Closure, One size fits most.
> Description, Table	abc	
> Description, Web	abc	
> Feature Bullet 1	abc	Built-in sweatband wicks away sweat to keep you cool & dry
> Feature Bullet 2	abc	Stretch construction provides a comfortable fit

The image above shows three inherited values, which are designated by a green down arrow (▼).

The value is set at the product group, or in this case, 'Hats and Caps Sales Items'. Therefore, all products beneath will inherit the same value.

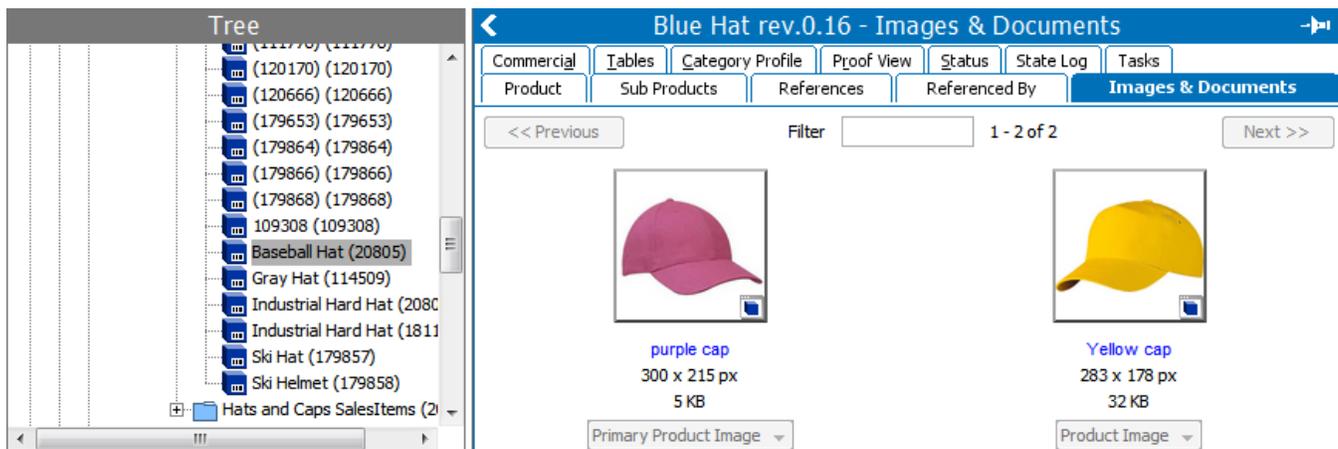
It is possible to override an inherited value by setting a different value at any subordinate level, e.g., the product level. This is called a **localized value**. However, this requires that the attribute be valid for the child object type (as is the case for the inherited values shown in the screenshot above). Attributes that display as inherited (indicated by the green arrow) but not editable (e.g., value field is yellow rather than white) are not valid for the object, so they can only have a common value with all sibling products, which is inherited from a parent higher in the hierarchy. Detailed information on setting validity of attributes is available in the **Validity on Specification Attributes** topic in the **System Setup / Super User** guide.

If a value is localized, then subsequently deleted, the product will again automatically inherit the parental value. Therefore, it is impossible to have null (blank) values for inherited attributes (unless the parental object has the null value).

For information on working with and/or setting up inherited reference values, see the **Inheritance of References** section in the **Reference and Link Types** topic in the **System Setup / Super User** guide.

Images & Documents Tab

When working with products, the Images & Documents tab displays thumbnails of all assets that are referenced by the selected product, or inherited from a parental object referencing the asset. When working with classifications, this tab displays all assets that are child to the selected classification. The functionality for working with the displayed assets is the same, regardless of whether a product or classification has been selected.



If more than 50 assets are present, the **Next / Previous** buttons are enabled at the top of the screen, allowing users to page through sets of assets (50 at a time). Filtering functionality is also available and is especially useful when working with large sets of assets. The options for filtering are described below.

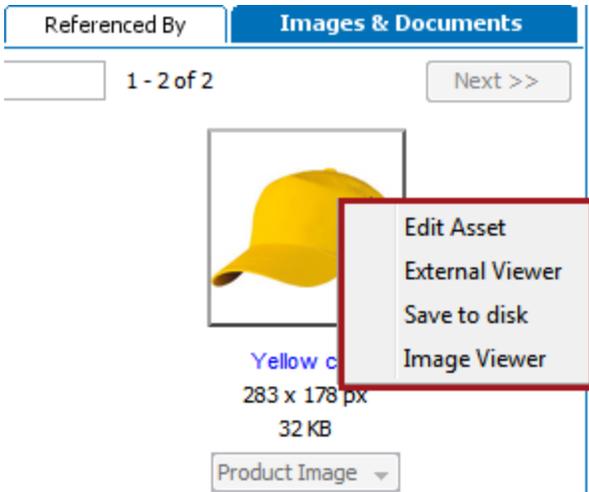
Along with each thumbnail, basic information about the asset is displayed, including asset name, pixel size, file size, and reference type used to link the asset to the selected object.

Interacting with Assets

From the Images & Documents tab, several actions can be taken with the displayed assets.

Edit asset

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



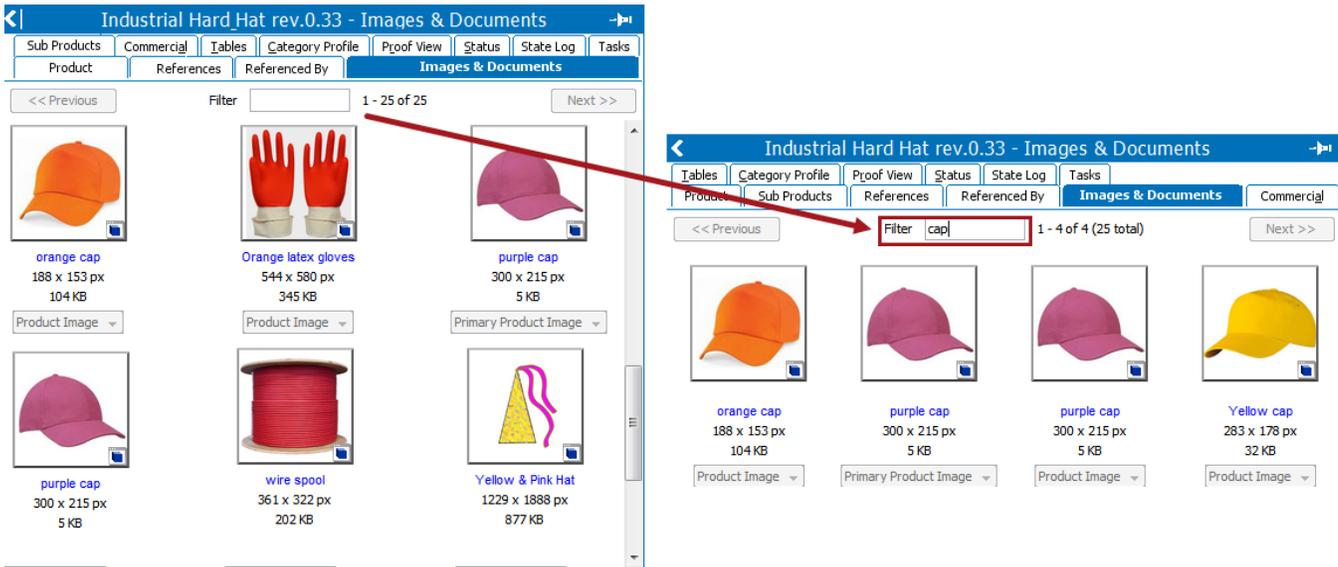
Edit reference type

The type of reference that links the object and the asset is displayed in a dropdown below the asset thumbnail. Selection in the dropdown will be disabled (grayed out) if there is only one valid reference between the object type and asset type. If multiple valid reference types are available, selection of the reference type is enabled and can be edited from this location. More information on references is available in the **Reference and Link Types** topic in the **System Setup / Super User** guide.

Filter the displayed assets

A user can filter the displayed assets by entering the name of the asset in the Filter field. This action displays assets that have the entered value as part of the asset name, as shown below.

Note: The filter automatically applies wildcard functionality so explicit entry of wildcards (*) is not needed. Entering an asterisk will cause the system to search for assets with an asterisk in their name.



To remove the applied filter, delete the characters in the filter field and press the Enter key on your keyboard.

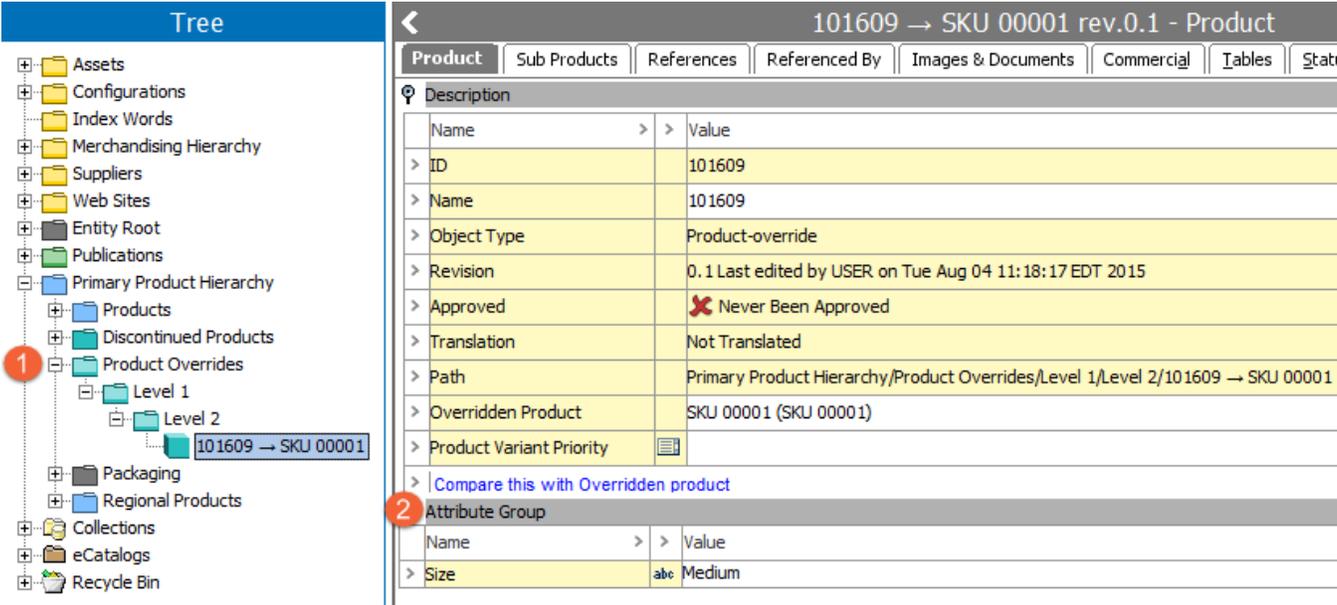
Navigate to asset

The asset name is shown directly below the asset thumbnail as a hyperlink. Clicking the hyperlink navigates directly to the asset in the classification structure.

Product Overrides

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

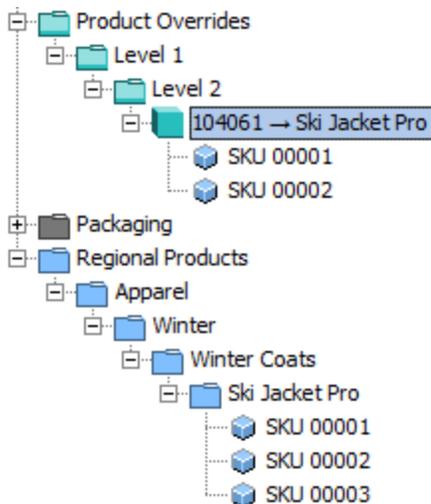
A product override folder can include products from various "standard" (e.g. non-override) product families. Similarly, a product override leaf object can live under a different product folder (override or standard) than the folder in which its corresponding standard object resides.



1. Tree Structure: For clarity, it is recommended to house product overrides in a separate sub-hierarchy from standard products.

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

Example of a Product-Override:



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

Two products from the product family **Ski Jacket Pro** are linked into the product override folder (SKU 00001 and SKU 00002). The product override only contains a subset of the products included in the original product family **Ski Jacket Pro**, as SKU 00003 is not included.

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

Selecting the Product tab or References tab on the product-override will indicate with a yellow icon (), if an attribute or reference is inherited from an overridden product. Inherited values and references can be replaced with local versions, assuming the relevant attribute and/or reference is valid on the relevant product override object type.

Creating a Product-Override

1. In **Tree**, select an object for which an override should be created.
2. Right-Click and select **New Product-Override**
3. In the Create Product-Override dialog,
 - Click an Object Type
 - Key in ID and Name
 - **Optional:** Press the ellipses button [...] to select a product family to adapt values, references, and links from. The product-override will inherit all values, references, and links from the selected product family.
 - **Optional:** Click 'Adopt Children' if the product-override should also include all products from the overridden product family.
4. Press **Create** to create the product-override.

Linking Products into a Product-Override

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

Removing Products from the Product-Override

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

Creating a Sub-Product-Override

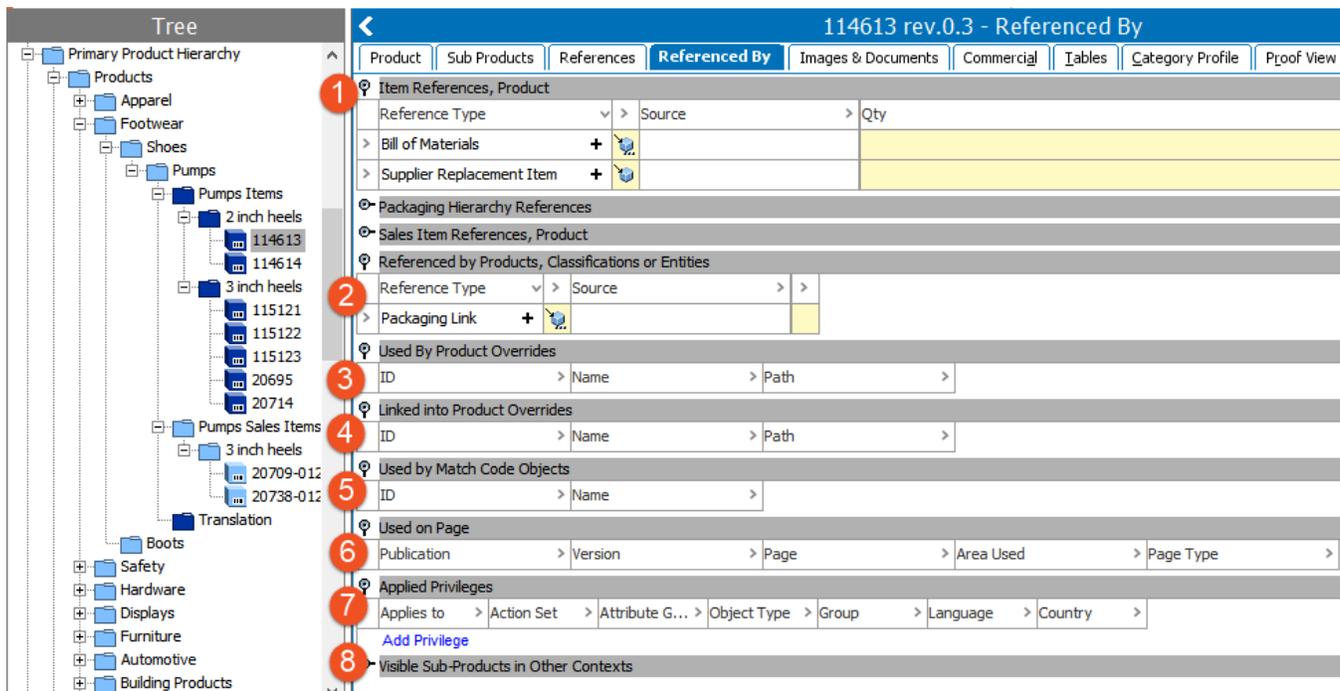
1. In **Tree**, select the product-override
2. Select a product linked into the product-override
3. Right-click the product and click **Convert to Product-Override**

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

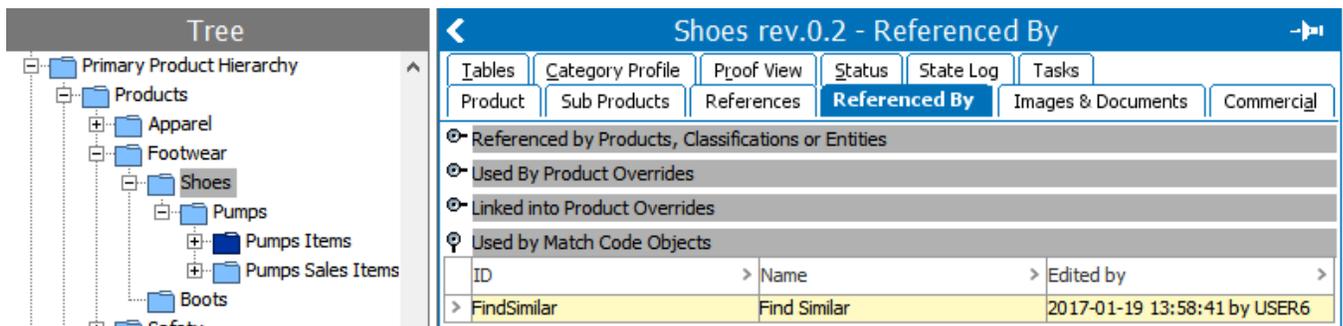
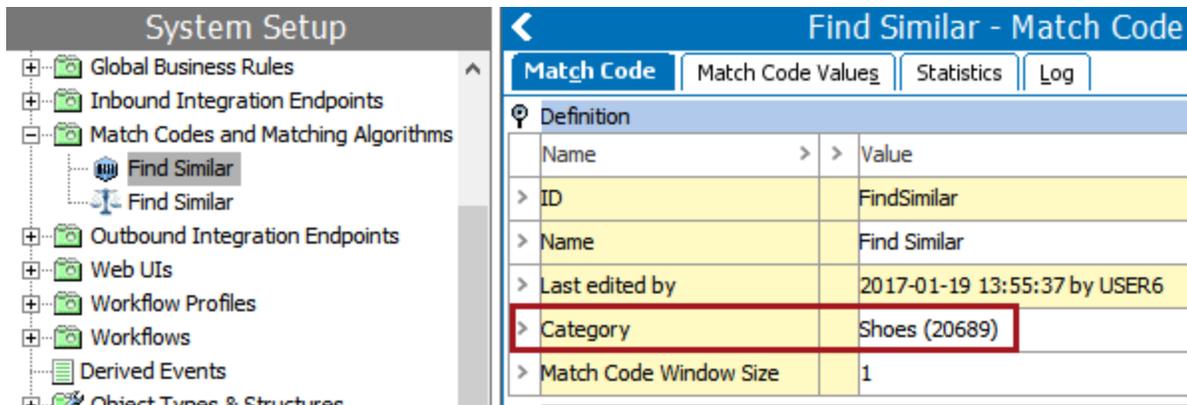
Referenced By Tab

The Referenced By tab is where all references of which the selected object is the target (e.g., all the objects that the selected object is referenced by) can be viewed and edited (assuming proper privileges are in place). In addition, if the object is used by product overrides, has a match code acting on it, or is used by any publication, that information can be viewed on this tab. Finally, privileges assigned to the product can be added and edited from this location, and subproducts that are present only in other contexts can be viewed (if the object is of a dimension-dependent object type).

The display of the Referenced By tab on a product will vary slightly from system to system, based on the data model.



1. **Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid target that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a source for the reference, and a reference will be created from the object selected in the dialog to the currently selected object that you are standing on (e.g., current object = target, dialog selection = source). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.
2. **Referenced by Products, Classifications or Entities:** The functionality here is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes.
3. **Used By Product Overrides:** Displays product override objects that are based on the selected object. More information on product overrides is available in the Product Overrides topic in this guide.
4. **Linked into Product Overrides:** Displays product override objects that have the selected object as a child. More information on product overrides is available in the Product Overrides topic in this guide.
5. **Used by Match Code Objects:** If the selected object is the Category indicated in a match code, the match code will display here. For example:



More information on match codes is available in the Matching and Linking guide.

6. **Used on Page:** Displays publications that the selected object is used in. Additional information about working with publications is available in the Publications section of this guide.
7. **Applied Privileges:** Displays the privileges that have been applied to the selected node. Privileges can be added using the Add Privilege link, and can be removed by clicking on the row indicator and selecting 'Remove Privilege'. Existing privileges cannot be edited from this interface. Detailed information on creating and editing privileges is available in the Privilege Rules section of the System Setup / Super User guide.
8. **Visible Sub-Products in Other Contexts:** Displays subproducts that are visible in another context, which is only applicable if the object type is dimension-dependent. Note that it is *not* recommended to make product object types dimension-dependent; instead, it should only be data *on* objects (e.g., attributes and references) that are dimension-dependent. As a result, this flipper is rarely used.

References Tab

The References tab is where all references of which the selected object is the source can be viewed and edited (assuming proper privileges are in place). In addition, if the object has associated index words, is used by any publication, or has any linked attributes, that information can be viewed and edited on this tab.

The display of the References tab on a product will vary slightly from system to system, based on the data model.

The screenshot displays the Stibo Systems interface. On the left is a 'Tree' view showing a hierarchy of products, with 'T-shirts' > 'T-shirts Items' > '12-GGK799' selected. On the right is a 'References' table with the following sections:

- 1. Reference Flippers:** A section titled 'Item References, Product' containing a table with columns 'Reference Type', 'Target', and 'Qty'. It lists 'Bill of Materials' with targets '18212 L B' and '18213 M O', and 'Supplier Replace...'. A plus sign (+) is next to 'Bill of Materials'.
- 2. Ungrouped References:** A section titled 'Ungrouped Product References' containing a table with columns 'Reference Type' and 'Target'. It lists 'Packaging Link' with a plus sign (+).
- 3. Index Words:** A section titled 'Index Words' containing a table with columns 'Inherited From', 'Index', and 'Level 1'. It lists 'Locally defined' entries for 'Indexdoc_Test' with various index words.
- 4. Publications:** A section titled 'Publications' containing a table with columns 'ID' and 'Name'. It lists three publications with IDs 108494, 111845, and 111512.
- 5. Linked Attributes from Product Hierarchy:** A section titled 'Linked Attributes from Product Hierarchy' containing a table with columns 'ID' and 'Name'.

- 1. Reference Flippers:** References can be placed in attribute groups for display purposes. All references for which the selected object is a valid source that have been placed in attribute groups will display first on the screen, with the flipper title being equal to the name of the attribute group. References can be added by clicking the (+) on the reference. This will open a dialog allowing the user to select a target for the reference, and a reference will be created from the currently selected object to the object selected in the dialog (e.g., current object = source, dialog selection = target). If any attributes are available on the reference and editable, they can be edited within this interface. References can be removed by clicking the (X) on any existing reference. Additional information on configuring and working with references is available in the Reference and Link Types topic in the System Setup / Super User guide.
- 2. Ungrouped References:** The functionality here is identical to what is described for the Reference Flippers section above. The only difference is that this area displays references that have *not* been placed in attribute groups for display purposes. If *all* references that are valid for the selected object have been placed in attribute

groups, the **Ungrouped Classification Links** and **Ungrouped Product References** flippers will not be present.

3. **Index Words:** Allows users to view index words linked to the currently selected object, and to link index words using the **Add Index Words** link. Index words are maintained in a dedicated hierarchy where it is possible to maintain the word itself along with a sort word. More information is available in the Creating an Index Words Structure topic in the STEP'n'design documentation.
4. **Publications:** Publications that the currently selected product is linked to are displayed here, and new links can be created using the **Link to Publication or Section** link. Additional information about working with publications is available in the Publications section of this guide.
5. **Linked Attributes:** Attributes that are linked directly to the selected product or inherited from a parental node in the hierarchy display here under the **Linked Attributes from Product Hierarchy** flipper. The exact columns available will depend on the data model and the attributes that have been made valid on product attribute links. Whether or not the various attributes are editable will also depend on the setup of the data model. However, an ID and Name field are always shown, with the attribute name being a hyperlink that can be used to navigate directly to the attribute. An Attribute Groups column is also present, displaying the attribute group(s) that the attribute is in. A Mandatory column is present and if checked, the object cannot be approved until a value has been provided for the attribute. Note that mandatory settings on the attribute itself apply globally, while mandatory settings on the attribute link apply only to objects that are child of the node at which the attribute is linked. More information on mandatory settings is available in the Mandatory Attributes topic in the System Setup / Super User guide. If the attribute link is inherited (indicated by a green down arrow, , in the row indicator), the 'Inherited from' column will display the parental node where the attribute has been linked, which is hyperlinked for easy navigation. More information on linked attributes is available in the Inheritance in the Product Hierarchy topic within this guide and in the Attribute Links topic in the System Setup / Super User guide.

The **Linked Attributes from Classification Hierarchy** flipper is comparable to the product hierarchy counterpart described above, though shows attributes linked to a classification that the object is a member of (e.g. has a reference to), rather than attributes that are linked to a parental product. The same considerations apply in that the exact columns available will vary based on the data model, with ID, Name, Attribute Groups, and Mandatory columns always being present and functioning in the same way as for product attribute links. Note that objects shown in the 'Inherited from' column in this case are parental objects not of the selected object itself, but instead of a classification that is parent to the classification that the selected object references.

Status Tab

The Status Tab provides general information about objects, including revisions, translation status, and approval status. For products and classifications, the Status tab displays the same information, regardless of the object type. Publications, entities, and assets have slightly different information available, though much of it is common to what is described below.

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

- Revisions:** In STEP, historical versions of objects are stored as revisions. A revision thus represents a historical "snapshot" of an object. The Revisions flipper provides a record of the revisions that have been made to the currently selected object, including when changes to the object were made and who made them. Via right-click, users are able to purge old revisions or revert to previous revisions. For more information on revisions, including how they are generated and how they should be managed, see the **Managing Revisions in STEP** topic in the System Setup / Super User guide.
- Workspaces:** All the workspaces that the selected products are in will display here, as well as the revision number that exists in that workspace. Generally speaking, if the object has been edited since it was approved, the Main and Approved workspaces will hold different revisions. However, it should be noted that not all changes to an object generate a revision. More information on this is available in the **Managing Revisions in STEP** topic in the System Setup / Super User guide. For more information on workspaces in general, see the Workspaces topic in the System Setup / Super User guide.
- Translation:** Translation relations (sources and targets) and status (e.g. Up to date, Re-translation needed, etc) of the translations display here. For more information, see the **Translations** documentation.
- Approval status in all contexts:** Displays the approval status of the object in each context on the system. More information on approvals is available in the **Approval of Objects** topic in the Getting Started / User guide. More information on contexts is available in the **Contexts** topic in the **System Setup / Super User** guide.

- 5. **Hidden values:** Displays hidden inherited values on the object. Hidden values are those that are inherited from another dimension (e.g. language or country) rather than from a parental object. More information on this is available in the **Dimension Dependent Data** section of the Contexts topic in the System Setup / Super User guide.
- 6. **Diagnostics:** Displays any issues with the object found by system diagnostics. If a problem has been found, the information can be copied by clicking the file link.

Diagnostics
 Problems found. Press button to copy information to clipboard. Please supply this information to Stibo System.

Sub Products Tab

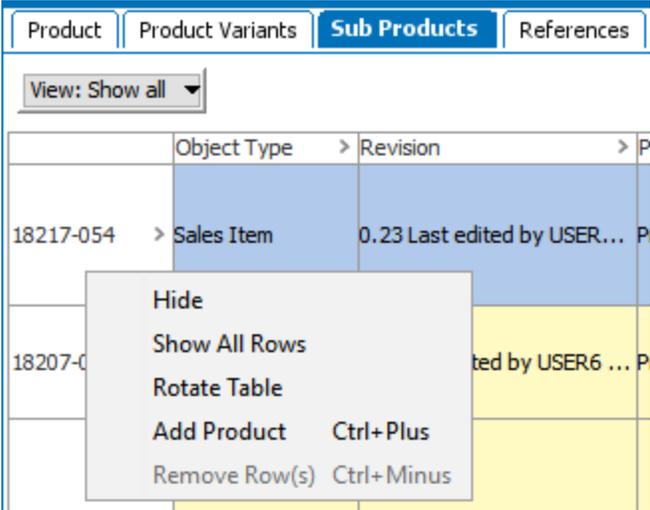
When the Sub Products tab is accessed on an object of the product super type, all direct children of the selected node are displayed. If privileges allow, data can be edited on the displayed objects by clicking directly into any editable field. Standard editing capabilities are available within this interface (as described in the **Editing Objects in Tree** topic within this guide) including copy / paste functionality using Ctrl + C and Ctrl + V.

The screenshot shows the 'Sub Products' tab for 'T-shirts rev.0'. On the left is a tree view of the product hierarchy, including 'Apparel', 'Upper Body Wear', 'T-shirts', and 'T-shirts Items'. The right pane displays a comparison table for three product variants: 18217-054, 18207-012, and 18214-012.

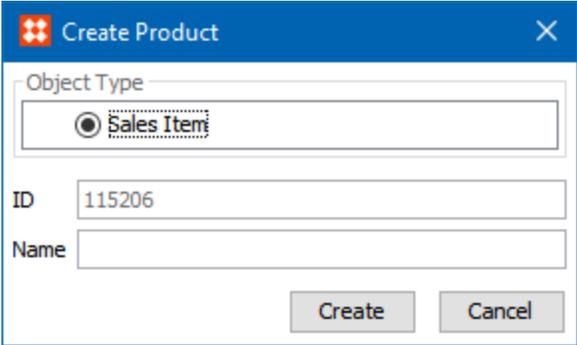
Product	Product Variants	Sub Products	References	Referenced By	Images & Documents	Commercial	Tables	Category Profile
ID	> 18217-054	> 18207-012	> 18214-012	>	>	>	>	>
ID	> 100305	> 18207	> 18214	>	>	>	>	>
Name	> 18217-054	> 18207-012	> 18214-012	>	>	>	>	>
Object Type	> Sales Item	> Sales Item	> Sales Item	>	>	>	>	>
Revision	> 0.23 Last edited by USER6 on Thu Ja...	> 0.4 Last edited by USER6 on Mon ...	> 0.5 Last edited by USER6 on Thu Ja...	>	>	>	>	>
Path	> Primary Product Hierarchy/Products/...	> Primary Product Hierarchy/Produc...	> Primary Product Hierarchy/Products/...	>	>	>	>	>
Approved	> ✘ Last Approved on Fri Sep 16 10:...	> ✘ Last Approved on Mon Jun 15...	> ✘ Last Approved on Mon Jun 15 1...	>	>	>	>	>
Translation	> Not Translated	> Not Translated	> Not Translated	>	>	>	>	>
Category	> Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18217-054	> Classification 1 root Merchandising Hierarchy Apparel Sportswear T-shirts 18207-012	> Classification 1 root Web Sites Acme Retail Web Site Apparel Mens Casual T-shirts and Sweatshirts 18214-012	>	>	>	>	>
Parent	> T-shirts	> T-shirts	> T-shirts	>	>	>	>	>
Selling Price	>	> 8.57 \$	> 8.57 \$	>	>	>	>	>
Annual Sales Forecast, Maximum	>	> 5000	> 5000	>	>	>	>	>
Annual Sales Forecast, Minimum	>	> 2000	> 2000	>	>	>	>	>
Description, Long	> The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.	> The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.	> The best-selling T-Shirt For over 35 years, it has set the standard for T-shirt comfort and quality. Today it's better than ever, offering greater durability and less shrinkage than you'll get with ordinary tees.	>	>	>	>	>
Description, Table	>	>	>	>	>	>	>	>
Feature Bullet 1	> Fiber Content: Fabric: 100% Ring-spun Cotton	> Fiber Content: Fabric: 100% Ring-spun Cotton	> Fiber Content: Fabric: 100% Ring-spun Cotton	>	>	>	>	>
Feature Bullet 2	> Ultra-soft premium cotton feels great against your skin. ENG value test	> Ultra-soft premium cotton feels great against your skin.	> Ultra-soft premium cotton feels great against your skin.	>	>	>	>	>
Feature Bullet 3	> Non-chafe fabric taping reinforces neck and shoulders.	> Non-chafe fabric taping reinforces neck and shoulders.	> Non-chafe fabric taping reinforces neck and shoulders.	>	>	>	>	>
Feature Bullet 4	> Lay Flat collar keeps its shape wash after wash.	> Lay Flat collar keeps its shape wash after wash.	> Lay Flat collar keeps its shape wash after wash.	>	>	>	>	>
Feature Bullet 5	> Durable double stitching trims sleeves and bottom hem.	> Durable double stitching trims sleeves and bottom hem.	> Durable double stitching trims sleeves and bottom hem.	>	>	>	>	>
Primary Color	>	> Blue	> Orange	>	>	>	>	>
Sales Item Short Description	>	> T-shirt, Blue, M, cotton	> T-shirt, Orange, L, cotton	>	>	>	>	>
Selling Price UOM	>	> EA	> EA	>	>	>	>	>
Size	>	> Medium	>	>	>	>	>	>

Right-clicking on any field within the table will expose additional options, including Copy, Paste, Hide Equal, and Mark Different selections - all of which are self-explanatory and can be especially useful when editing multiple objects.

Note that two views are available using the **Rotate Table** option. As shown above, the view can be organized to have attributes on the vertical axis. As shown below, the table can also display products on the vertical axis. Also note that right-clicking within the header field exposes different options than within the data fields, including an option to add a product.



Selecting **Add Product** opens a Create Product dialog allowing the user to input data to create a new object, which will be added as a child to the currently selected node. The options available in the dialog are based on the data model defined in System Setup. For example, the object type selection will vary based on the allowable object types under the selected parent, and ID will only be available for population if the object type being created does not have autogenerated IDs applied.



Note that the same functionality is available using the **Add Product** link at the bottom of the Sub Products editor.

Publications

This section covers information specific to the publication objects in STEP that is important to know when working with publications. For general object maintenance information (applicable to all object types rather than specific to publication objects), see the **All Objects** topic within this guide.

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

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

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

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

STEPXML imports:

- **STEPXML Format** in the **Data Exchange** documentation
- **Managing Objects in AutoPage** in the **AutoPage** documentation

Publication Excel imports:

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

Creating a Publication Group

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

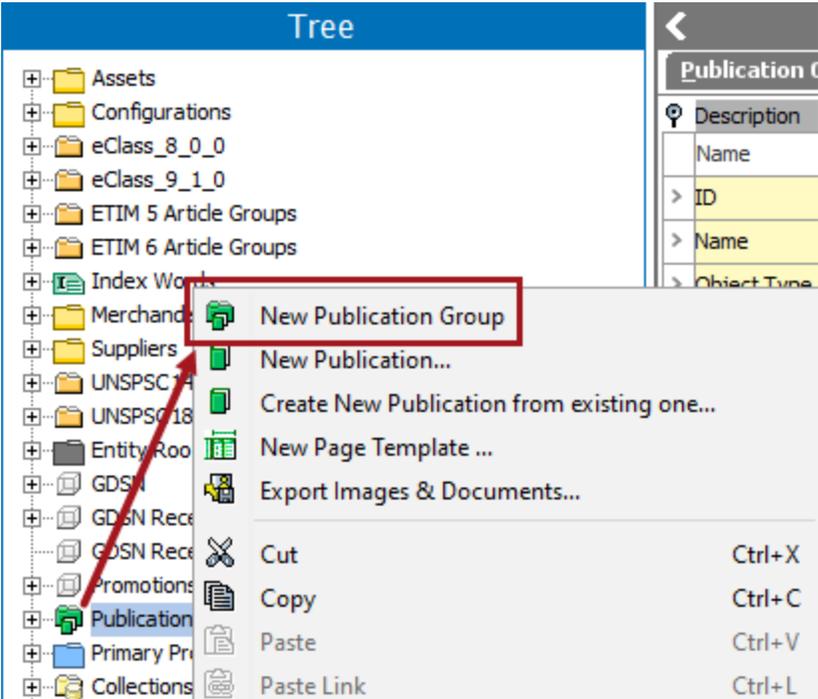
Note: Unless created by Excel or STEPXML import, publications cannot be created in STEP until at least one publication template and one product template has been saved back to the workbench. For instructions on how to configure and save these templates into STEP, see the **STEP'n'design** documentation.

Steps to Create a Publication Group

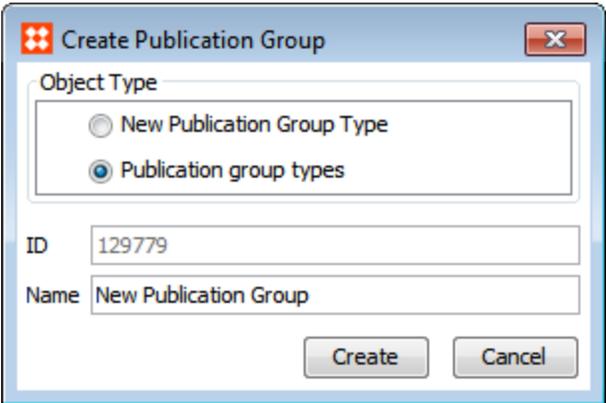
1. In the **Tree**, click on the top level of the publication hierarchy (green tree node). The standard ID of this root node is **Publication hierarchy root**. If this root node does not exist on your system, contact Stibo Systems for

assistance.

- 2. Right-click and select **New Publication Group**.



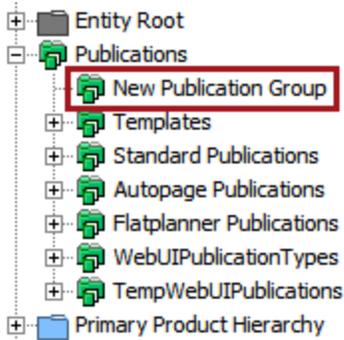
- 3. In the **Create Publication Group** dialog box that displays, click the relevant **Object Type**, if applicable.



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

- 4. Type an ID in the **ID** field if the STEP ID for your publication group object type has not been set to autogenerate with an ID Pattern in System Setup. (The preceding screenshot shows an ID that has been created automatically.)

5. In the **Name** field, type a name for the publication group.
6. Click **Create**. The publication group is created.



A Note on Revisability

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

Creating a Publication

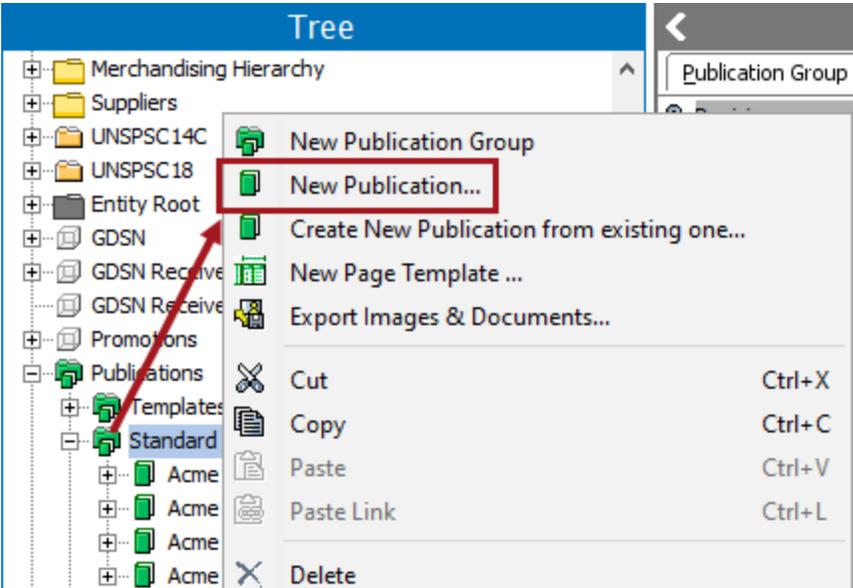
Publications are created in the green publication hierarchy in the Tree by the same basic process whether the publication will be used for standard STEP'n'design publishing ('drag and drop'), AutoPage, or Flatplanner.

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

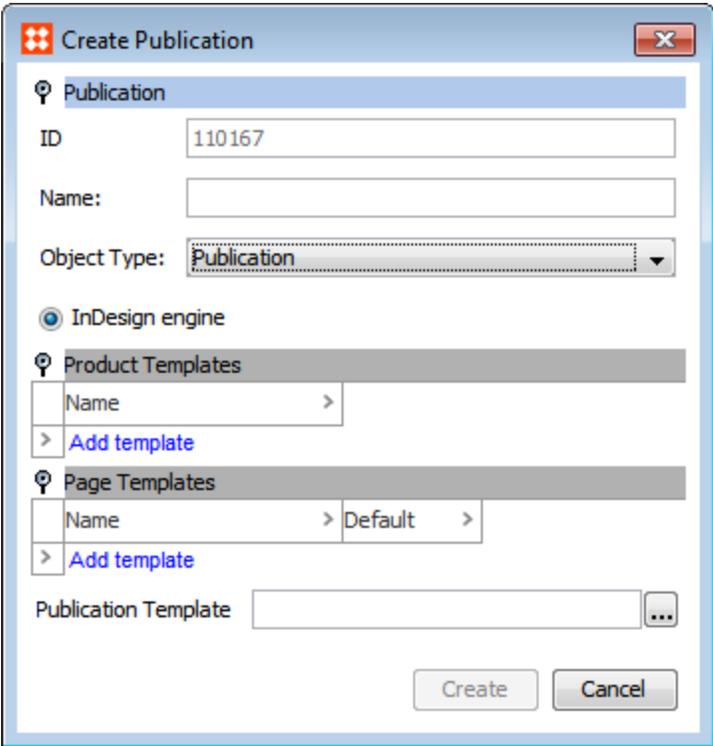
Though publications can be imported in STEPXML or Publication Excel formats, it is recommended to create your first publication in STEP manually. Once created, this publication can be exported to produce a 'template' spreadsheet that can be used for later publication imports.

Steps to Create a Publication Manually in the Workbench

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

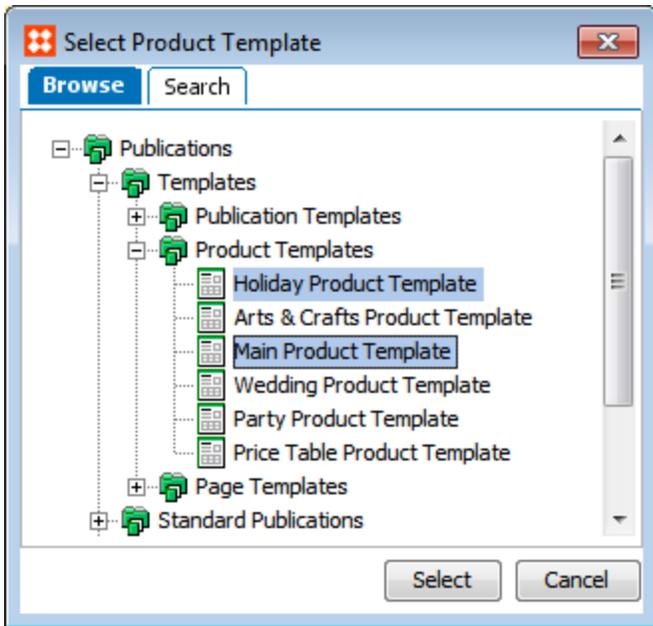


3. A **Create Publication** dialog box displays.

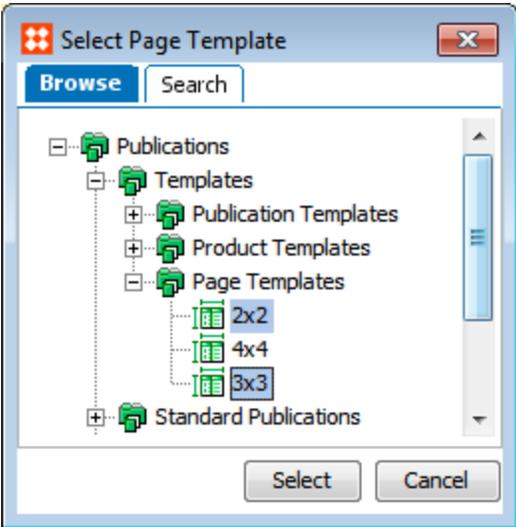


- 4. If the STEP ID for your publication object type has not been set to autogenerate with an ID Pattern in System Setup, type an ID in the **ID** field. (The preceding screenshot shows an ID that has been created automatically.)
- 5. In the **Name** field, type a name for the publication (a name is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

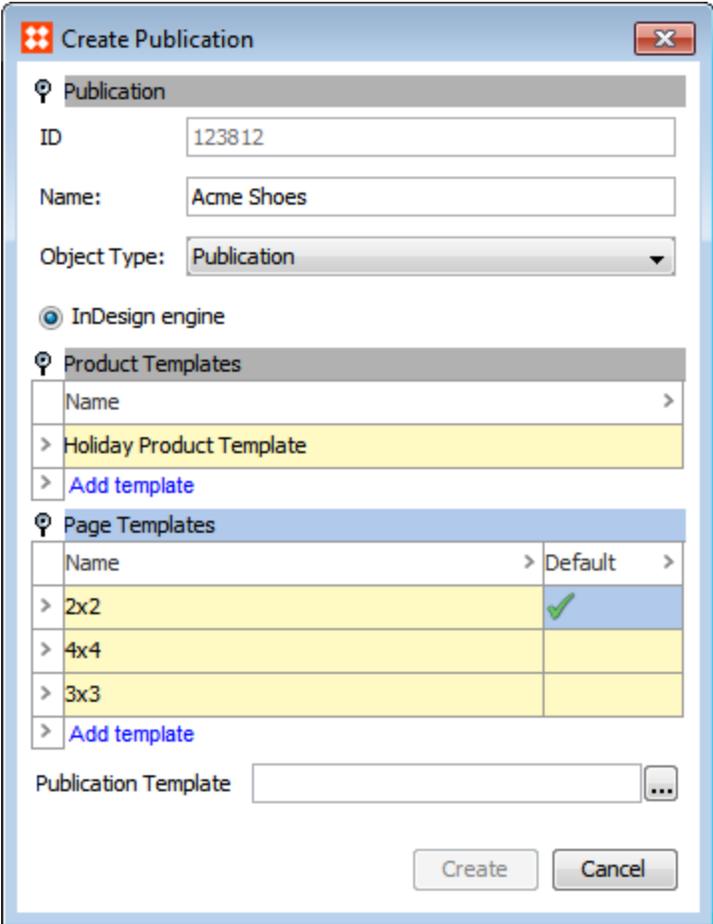
6. In the **Object Type** list, select a publication object type (only applicable if more than one publication object type has been created in System Setup).
7. In standard STEP systems there will be only one choice of engine—**InDesign engine**. If a **Quark engine** is required, contact Stibo Systems for assistance.
8. Under the **Product Templates** flipper, click **Add template**. A **Select Product Template** dialog appears. Either search or browse for the product template(s) that you would like to use in your publication. To select more than one template, hold the Ctrl or Shift key while making selections. Click **Select** when finished.



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

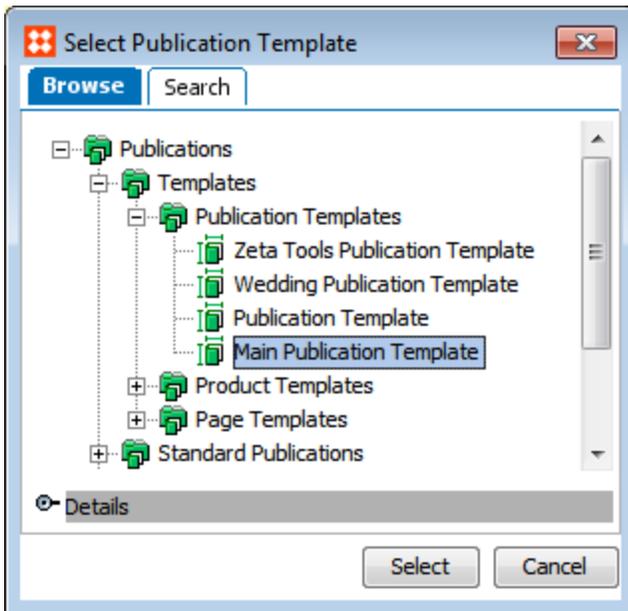


- A green check mark will appear next to the first page template to indicate that it is the default page template for the publication. To change the default template, click in the empty **Default** cell next to the page template that you would like to make default.

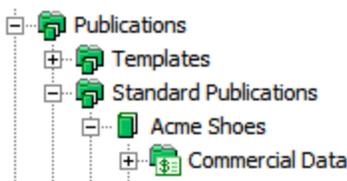


- In the **Publication Template** field, click the ellipsis button. A **Select Publication Template** dialog appears. Either search or browse for the publication template that you would like to use in your publication. Click **Select** when finished.

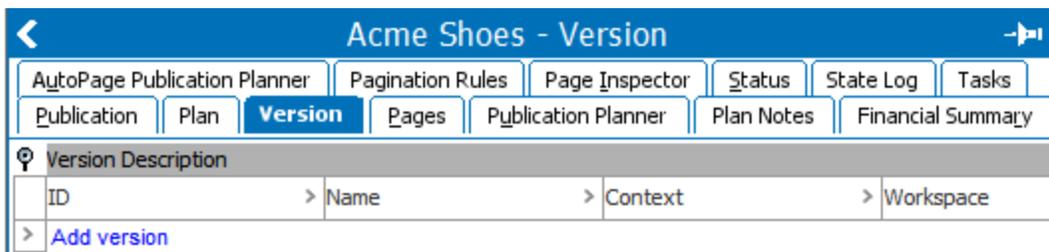
Note: Only one publication template is allowed per publication, as it is the master reference for all page sizes, paragraph styles, object styles, character styles, colors, and table rule settings in your publication.



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



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



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

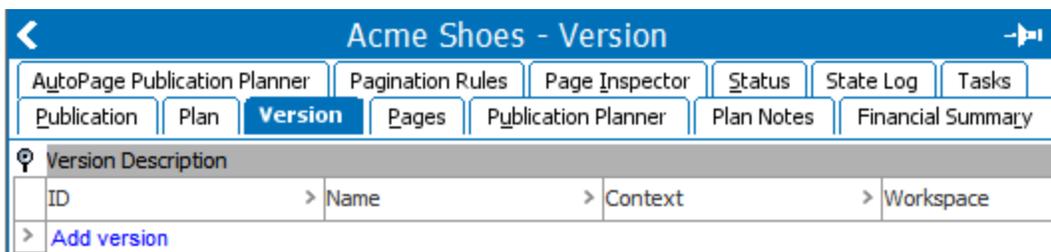
Creating and Removing a Publication Version

Once a publication object has been created, the next step in completing a publication is to create at least one **version**. Publications need at least one version to define the context(s) and workspace(s) that will be used within the publication. One reason to create multiple versions is when there are multiple languages being used within the same publication. For example, if the publication will be published in five languages, then five versions will be created. Versions may also be created for different currency zones, vertical markets, or types of catalog.

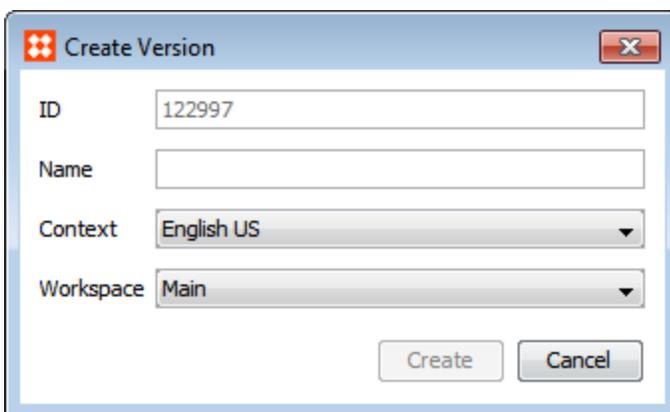
Note: Publication sections cannot be created until at least one version has been defined.

Creating a Version

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



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

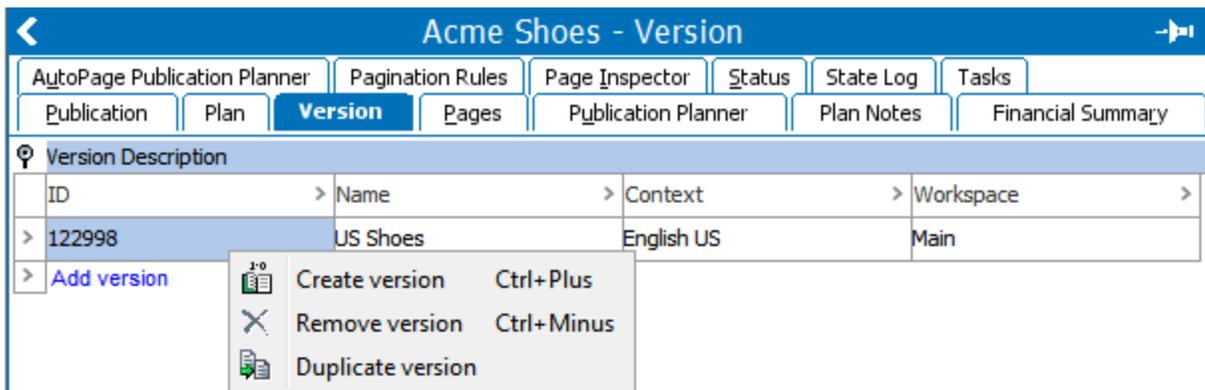


- If the STEP ID for the 'Publication Version' object type has not been set to autogenerate with an ID Pattern, type an ID in the **ID** field.
- In the **Name** field, type a name for the version.
- From the **Context** dropdown list, select the context from which the product data should be published.

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

Removing or Duplicating a Version

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

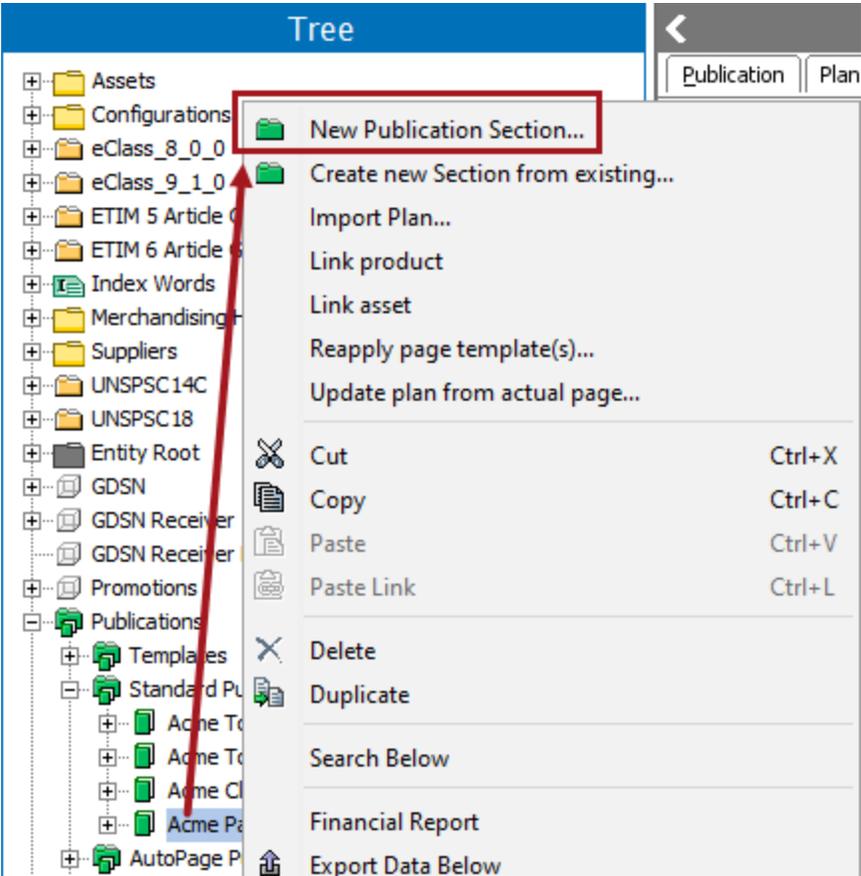


Creating a Section

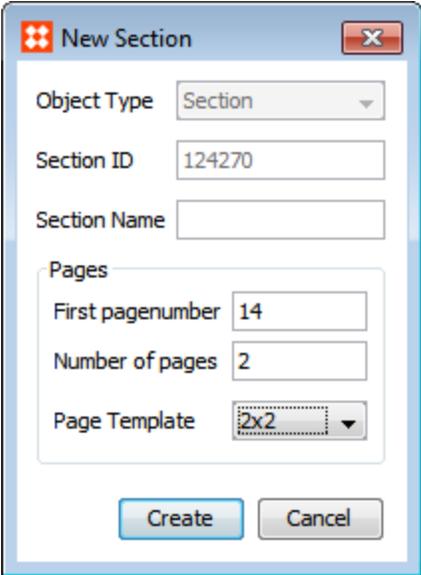
After creating a publication object with at least one version, the next step in completing your publication is to create at least one **section**. Sections are required for storing mounted (actual) InDesign pages in STEP as well as creating Flatplanner planned pages (spreads).

Steps to Create a Section

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

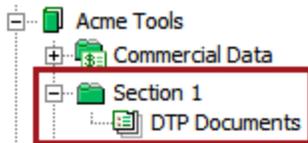


- 3. In the **New Section** dialog that displays, select the relevant section **Object Type** (only applicable if more than one section object type has been created in System Setup).



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

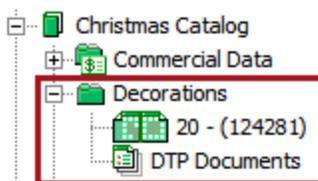
The **DTP Documents** node is automatically created along with sections. The DTP Documents node is used to store mounted (actual) InDesign pages in STEP.



Additional Steps for Flatplanner Publications

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

1. In the **First page number** field, type the page number at which the planned pages in the section should begin. (For new sections, the default page number is 1. For subsequent sections in the same publication, the page number will pick up after the last page number in the previous section.)
2. In the **Number of pages** field, type desired number of planned pages that should be created along with the section.
3. In the **Page Template** dropdown, choose the page template that should be used for the planned pages in the section. To create a section without any planned pages, enter '0' for **Number of pages**. (Note that planned pages cannot be named at the time sections are created. If names are required, they must be added after the planned pages have been created.)



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

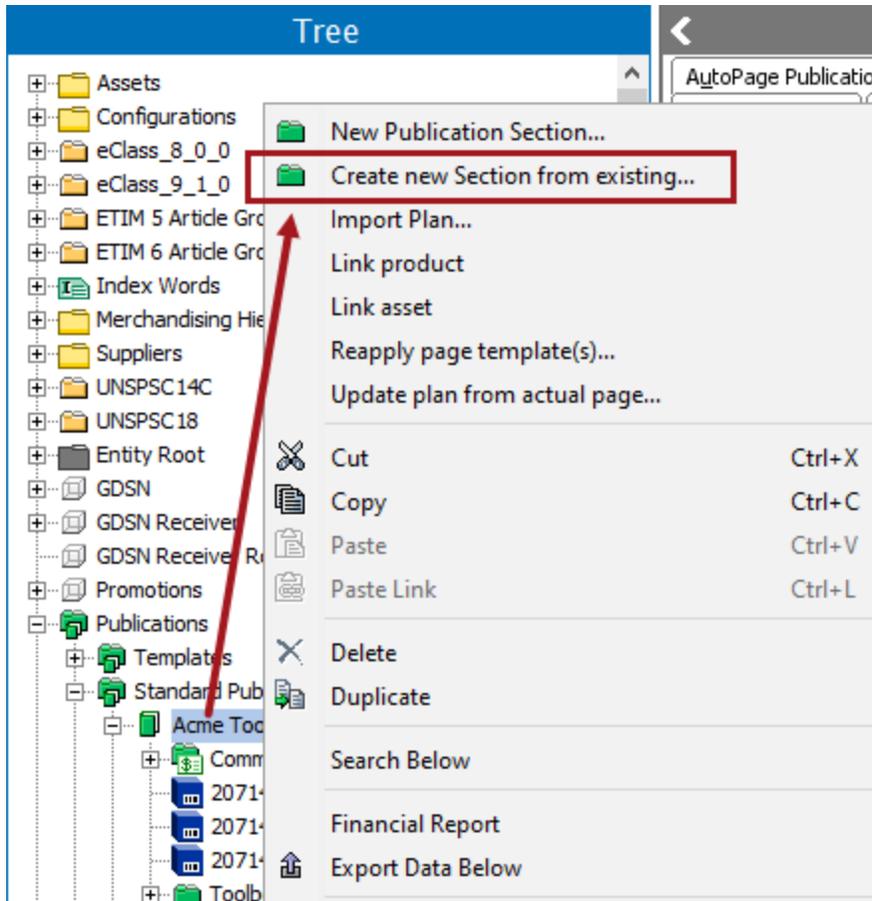
Create a New Section From Existing

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

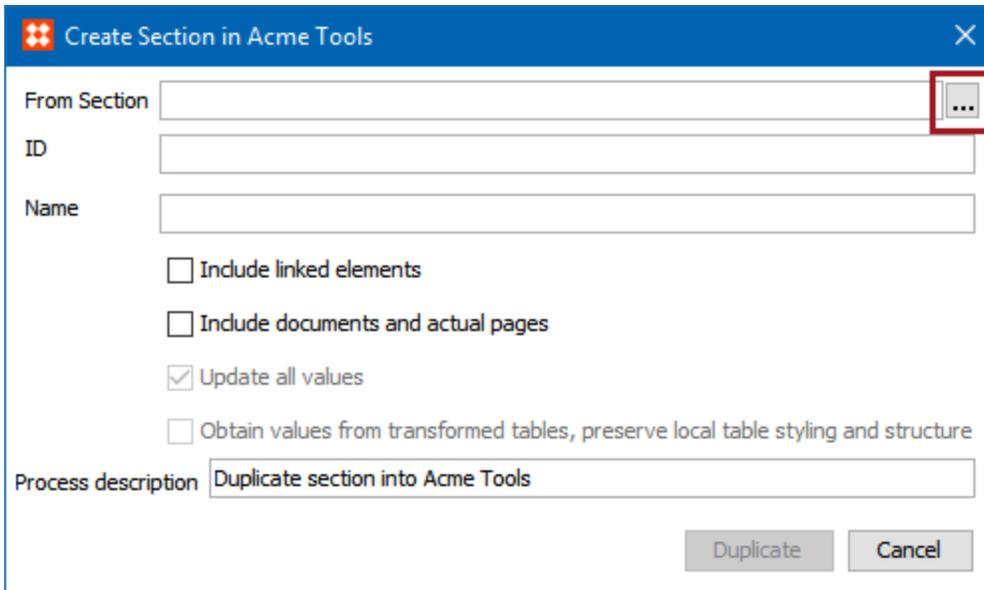
- Reassigning of product templates on Flatplanner pages
- Remounting of attribute values on pages
- Re-saving of InDesign pages into STEP

Steps to Create a New Section From Existing

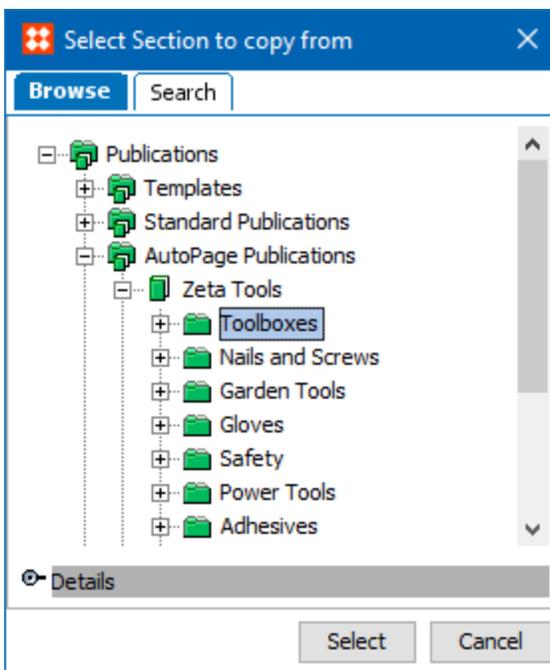
1. In the **Tree**, navigate to the publication or section where you would like to create the new section.
2. Right-click and select **Create new Section from existing....**



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



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



5. Type an ID in the **ID** field if the STEP ID for your section object type has not been set to autogenerate with an ID Pattern in System Setup. (The following screenshot shows an ID that has been created automatically.)
6. Type a name for the section in the **Name** field.
7. Select **Include linked elements** to carry over the product and asset objects that are linked to the source section.

8. To keep all mounted (actual) pages from the original section, select **Include documents and actual pages**. (For Flatplanner publications, a duplicated section will still contain all *planned* pages even if this checkbox is not selected.)
9. If **Include documents and actual pages** is selected, the **Update all values** checkbox is activated and the **Destination Version** and **Source Version** options display.
10. Under **Source Version**, choose the relevant publication version (from the source section) from the dropdown list(s). This will essentially 'map' the actual pages from the source section into the relevant destination version in the destination section.

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

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

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

12. The checkbox for **Obtain values from transformed tables, preserve local table styling and structure** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, preserve local table styling and structure** if the following statements apply:
 - Mounted tables exist on the actual pages of the original section
 - Attribute values within these tables have changed in STEP since the original section was created
 - You would like to update the values contained in the table cells but do *not* want to completely remount the tables

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

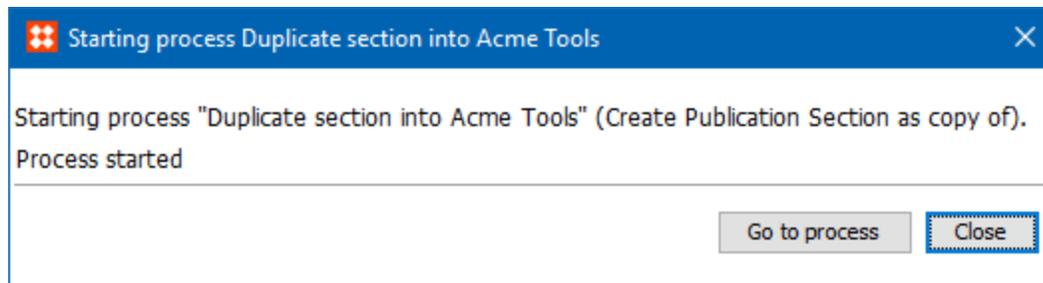
Note: Any *new* transformations applied to tables since the original section was created will not be applied to the updated tables in the new publication.

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

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

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

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



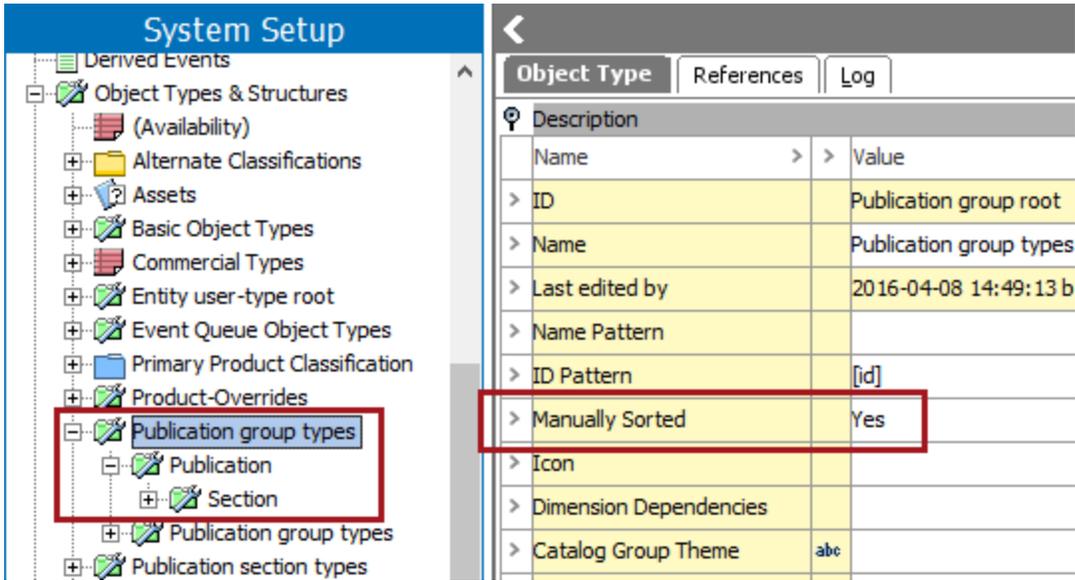
15. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
16. Once the background process has finished, the new section can be found as a child object inside the publication or section from which the duplication process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

Organizing Publication Sections in STEP

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

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

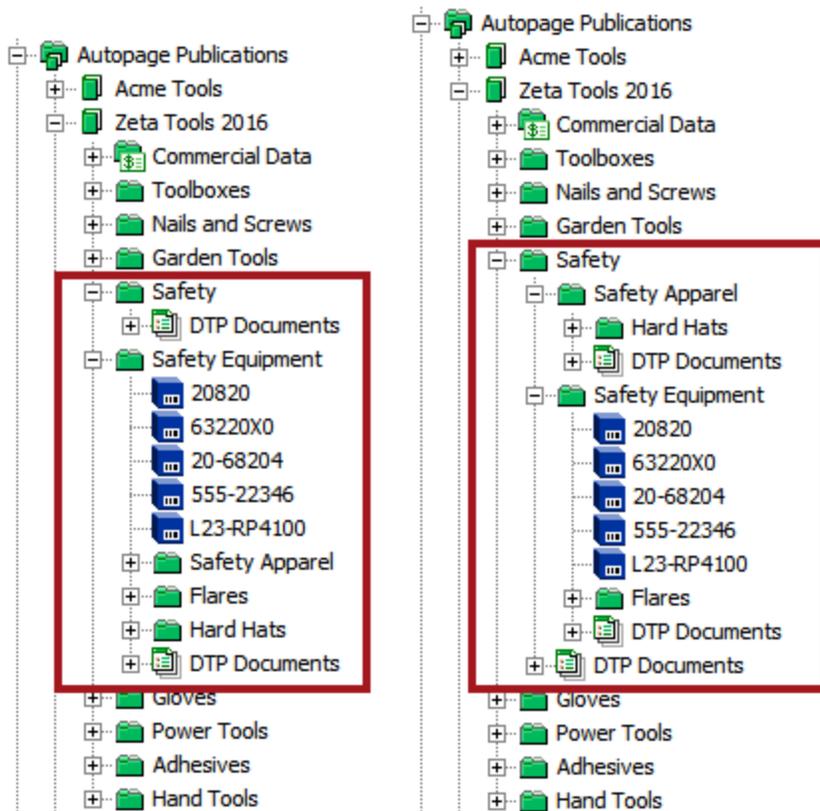
- Section (typically, the object type with the STEP ID 'Section')



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

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

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



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

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

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

Duplicating a Publication

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

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

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

Steps to Duplicate a Publication

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

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

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

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

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

7. The checkbox for **Obtain values from transformed tables, preserve local table styling and structure** is activated if **Update all values** is selected. Select **Obtain values from transformed tables, preserve local table styling and structure** if the following statements apply:

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

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

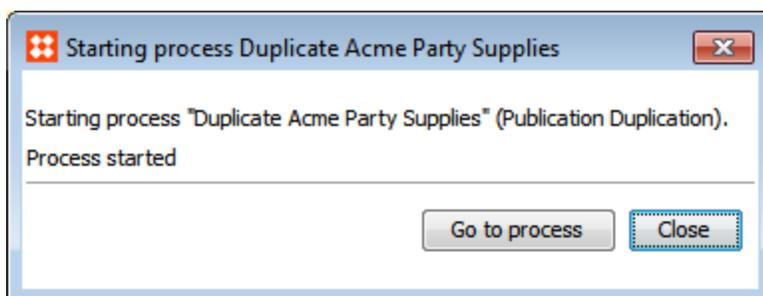
Note: Any *new* transformations applied to tables since the original publication was created will not be applied to the updated tables in the new publication.

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

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

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

8. Select **Include commercial information** to duplicate the commercial lists and commercial data import configuration(s) into the new publication.
9. Select **Include linked elements** to carry over the product and asset objects that are linked to the sections in the original publication.
10. In the **Process description** field, you may enter a name for the background process that will run when starting the duplication, though a name is not required.
11. Click **Duplicate**. A Publication Duplication background process starts and a **Starting process** dialog box appears.

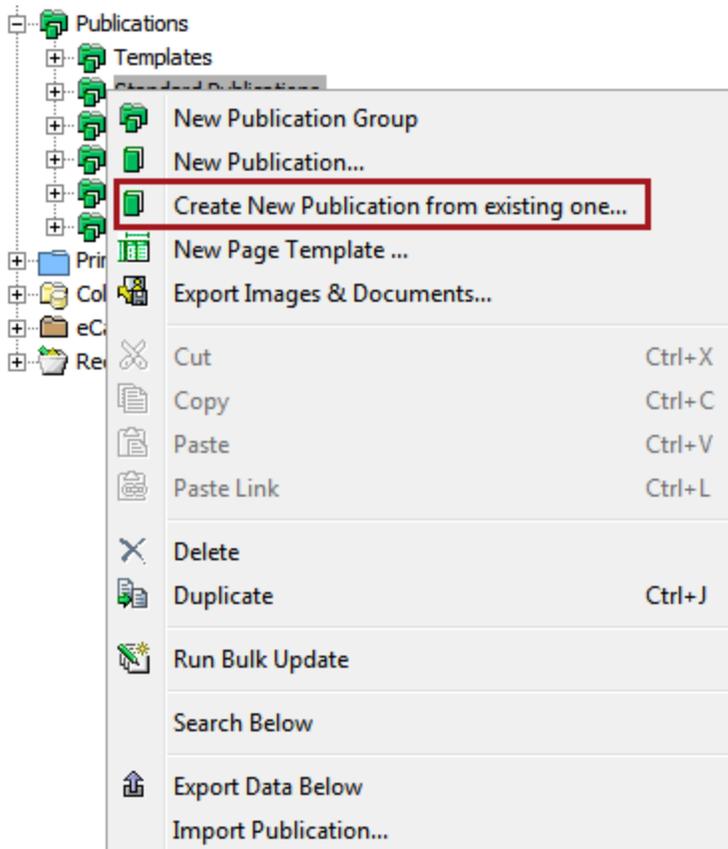


12. Click **Go to process** to monitor the background process or click **Close** to exit the dialog (the background process will still run).
13. Once the background process has finished the new publication can be found in the Tree.

Create a New Publication from Existing

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

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



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

Preventing the Remount of Structurally Different Tables in Duplicated Publications

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

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

- If **Obtain values from transformed tables, preserve local table styling and structure** is selected during the publication duplication process and **InDesign.TableMissMatch** is set to = 1, then tables with structural differences will *not* remount in the duplicated publication. Attribute values in the table will update but the table structure will not change. Manual formatting from the original publication will also remain.
- If **Obtain values from transformed tables, preserve local table styling and structure** is selected and **InDesign.TableMissMatch** is set to = 2, tables with structural differences will remount and manual formatting will be lost.
- If **Obtain values from transformed tables, preserve local table styling and structure** is selected and **InDesign.TableMissMatch** is set to = 3 (or any other value), tables with structural differences will be skipped. Values will not be updated, nor will tables be remounted.

Considerations and Limitations

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

The reasons for this recommendation are:

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

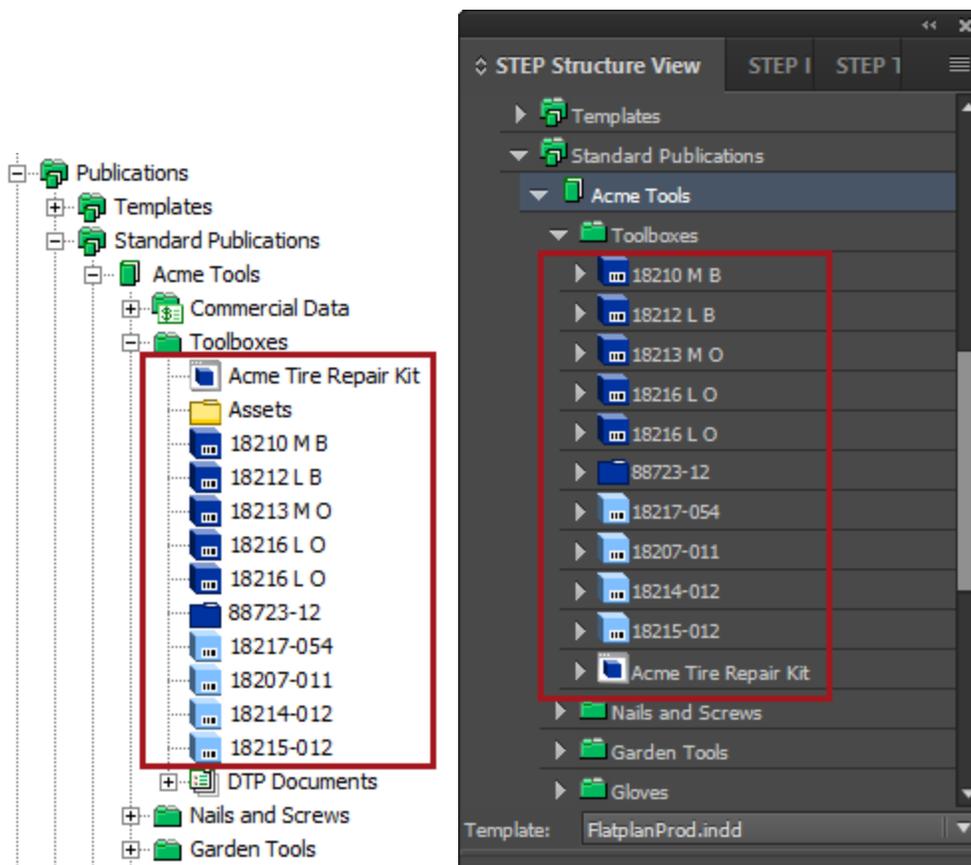
Linking and Unlinking Publication Products, Assets, and Classifications

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

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

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

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



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

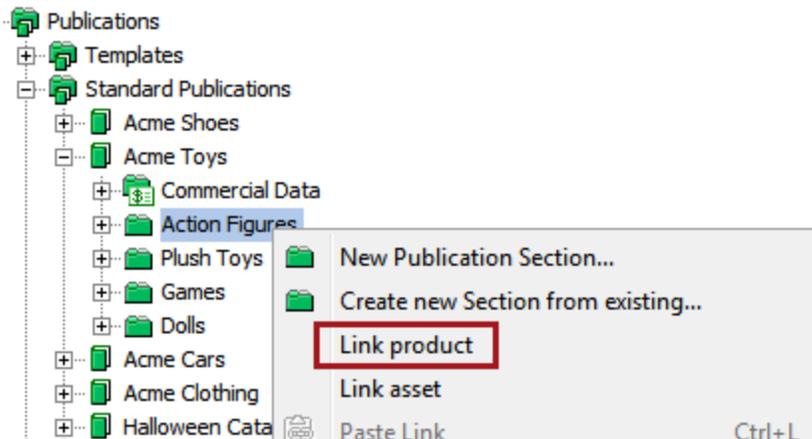
This topic outlines the manual steps involved in linking and unlinking products, assets, and classifications to and from nodes in the publication hierarchy. For information on more automated linking methods, refer to the following:

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

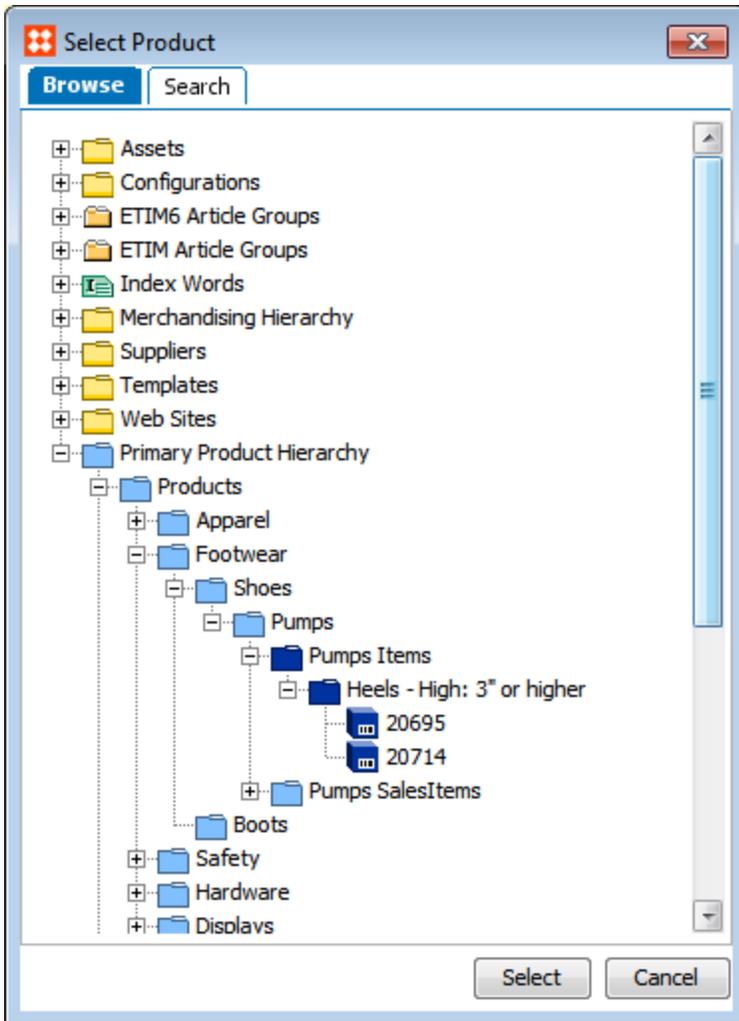
- For more information on linking objects to publication sections through **Excel** imports, see **Importing Publications in Excel** in the **STEP'n'design** documentation.

Steps to Link a Product to a Publication or Section

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



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



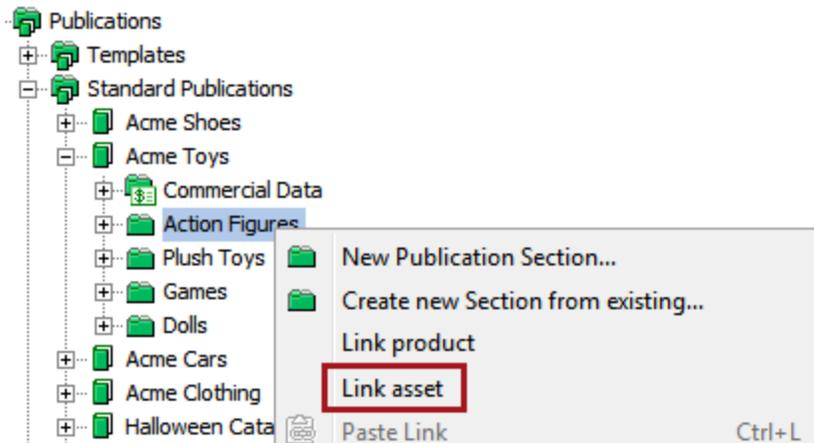
4. Click **Select** to link the selected product(s) to the publication or section.

Unlink a Product from a Publication or Section

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

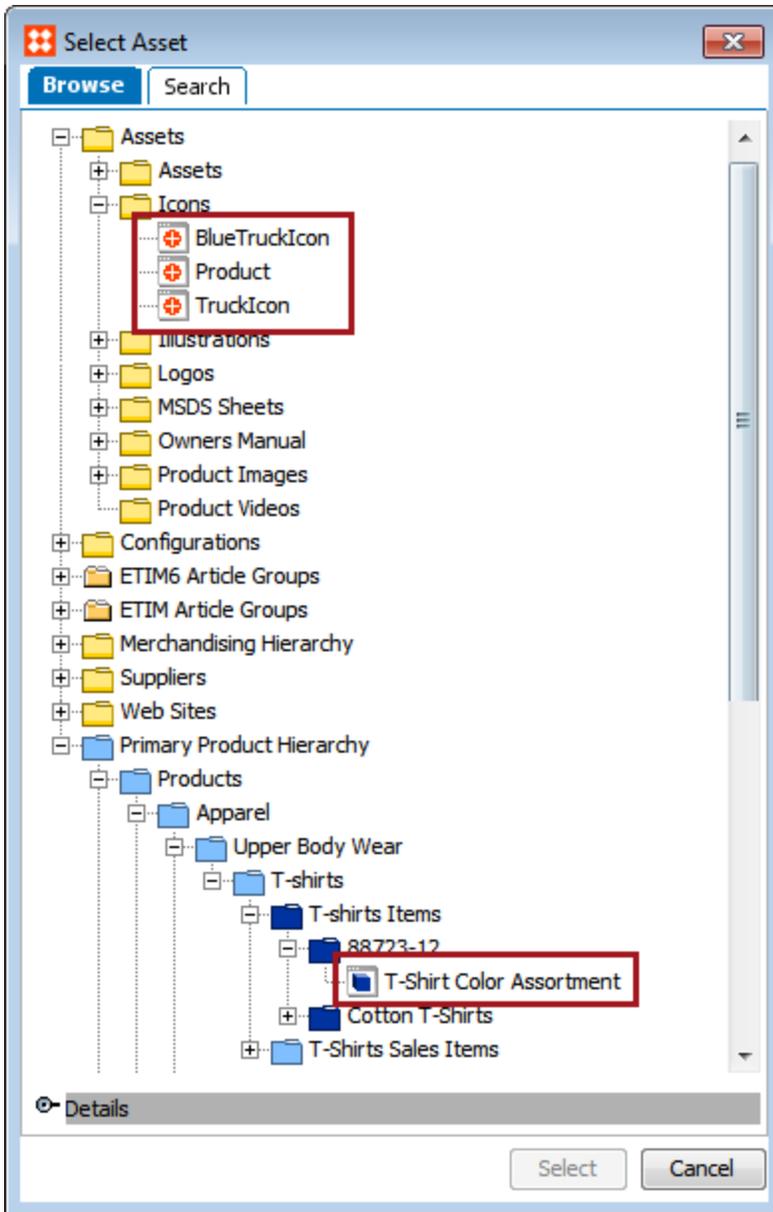
Link an Asset to a Publication or Section

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



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

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



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

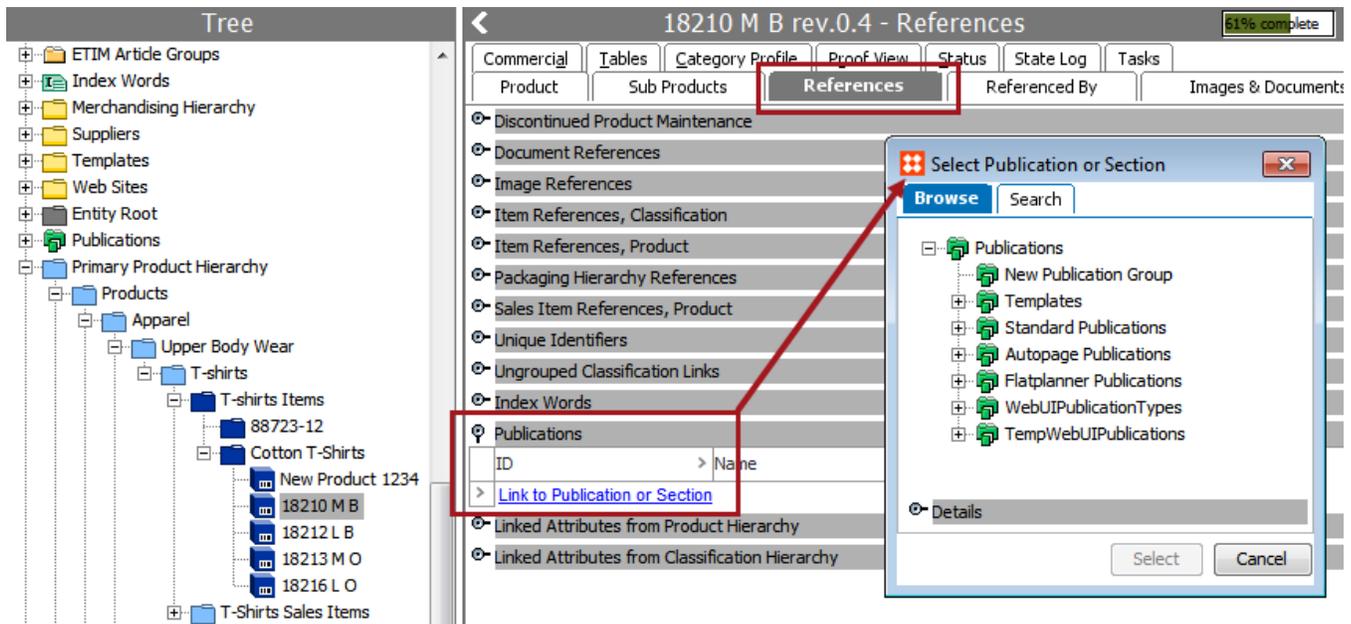
Unlink an Asset from a Publication or Section

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

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

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

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

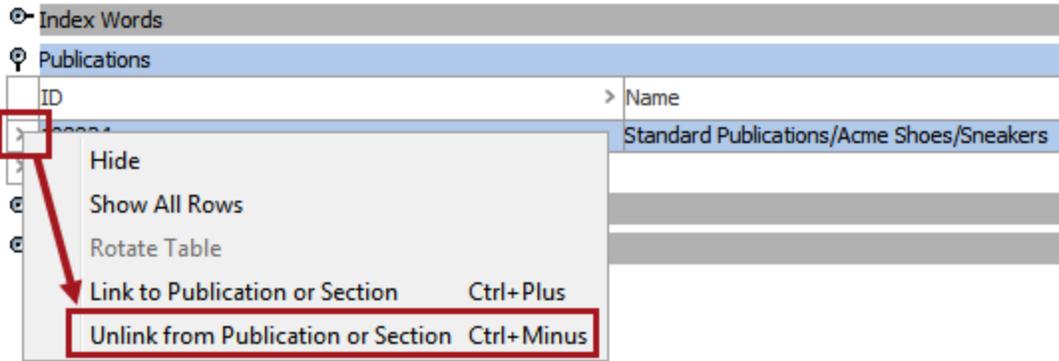


3. In the **Select Publication or Section** dialog, browse to or search for the publication or section into which you would like to link your product.
4. Click **Select**. The product is now linked to the selected publication / section.

Publications	
ID	Name
> 108824	Standard Publications/Acme Shoes/Sneakers
Link to Publication or Section	

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

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



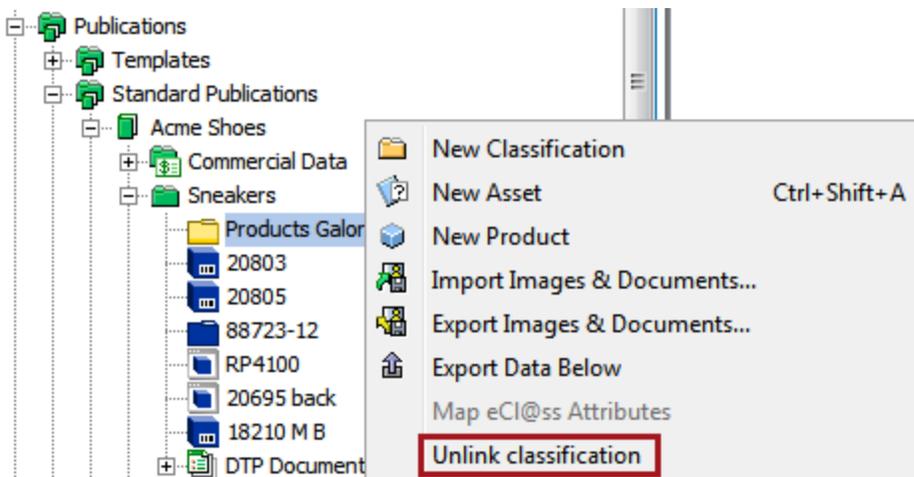
Link a Classification to a Publication Section

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

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

Unlink a Classification from a Publication Section

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



Considerations and Limitations

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

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

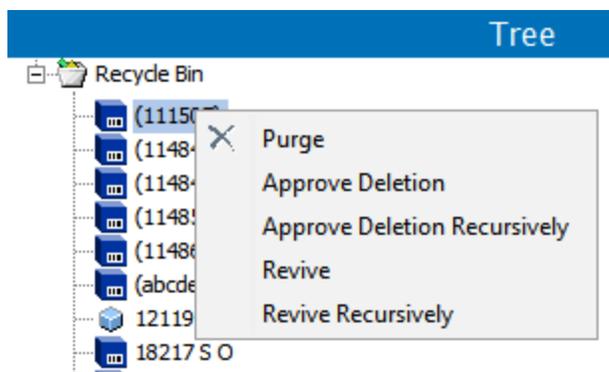
- Overview of the AutoPage Interface
- Managing Objects in AutoPage

Recycle Bin

This topic describes the functionality available for objects within the Tree Recycle Bin. For information on the System Setup Recycle Bin, see the **Recycle Bin** topic in the **System Setup / Super User** guide. For information on deleting objects from Tree, see the **Deleting Objects in Tree** topic within this **Getting Started / User** guide.

When objects are deleted from the Tree, they are moved to the Recycle Bin located on the Tree tab. From the Recycle Bin, objects can be revived or permanently deleted.

When right-clicking on any object in the Recycle Bin, several options are available related to removing or reviving objects in STEP. Each option is described below.



- **Purge:** Permanently deletes the object, with no subsequent option for revival. It is recommended to approve deletions prior to purging them, though it is not required. However, purging an object without first approving the deletion will NOT result in a deletion event being captured. Therefore, if deletion events need to be recorded for sending to downstream systems, the deletion should always be approved prior to the purge action being carried out. For more information on events, see **Events** in the **System Setup / Super User** guide.
- **Approve Deletion:** Deletes the selected object from the Approved workspace, and passes a deletion event for that object. This option is only enabled on objects that are workspace revisable.
- **Approve Deletion Recursively:** Deletes the selected object and all of its children from the Approved workspace, and passes a deletion event for all impacted objects. This option is only enabled on objects that are workspace revisable.
- **Revive:** Revives the selected object, returning it to the location in Tree from which it was deleted. Note that object revival has some dependencies and objects may not always be revived exactly as they were prior to deletion. For example, if an object had references to other objects which have subsequently been deleted, those references will not be present upon revival.
- **Revive Recursively:** Revives the selected object and all child objects to their previous location in Tree. Note that object revival has some dependencies and objects may not always be revived exactly as they were prior to deletion. For example, if an object had references to other objects which have subsequently been deleted, those references will not be present upon revival.

Navigation and Searches

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

This section will allow users to:

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

For information on search functionality in the Web UI, see the **Homepage Widgets** topic and the **Advanced Search** topic in the Web User Interfaces documentation.

Basic Navigation

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

Expanding a Folder

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

Collapsing a Folder

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

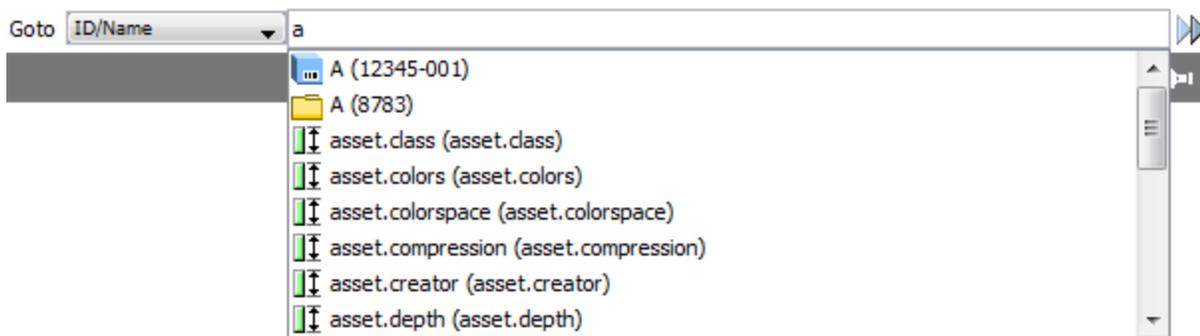
Note: Folders with an (x) sign cannot be expanded in the hierarchy, because they contain too many subnodes. To reach objects beneath such folders, the search or **Goto** functionality must be used.

Using Goto

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

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

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



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

Bookmarks

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

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

Standard Navigation Bookmarks

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

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

Search Bookmarks

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

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

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

Editing a Bookmark

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

Removing a Bookmark

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

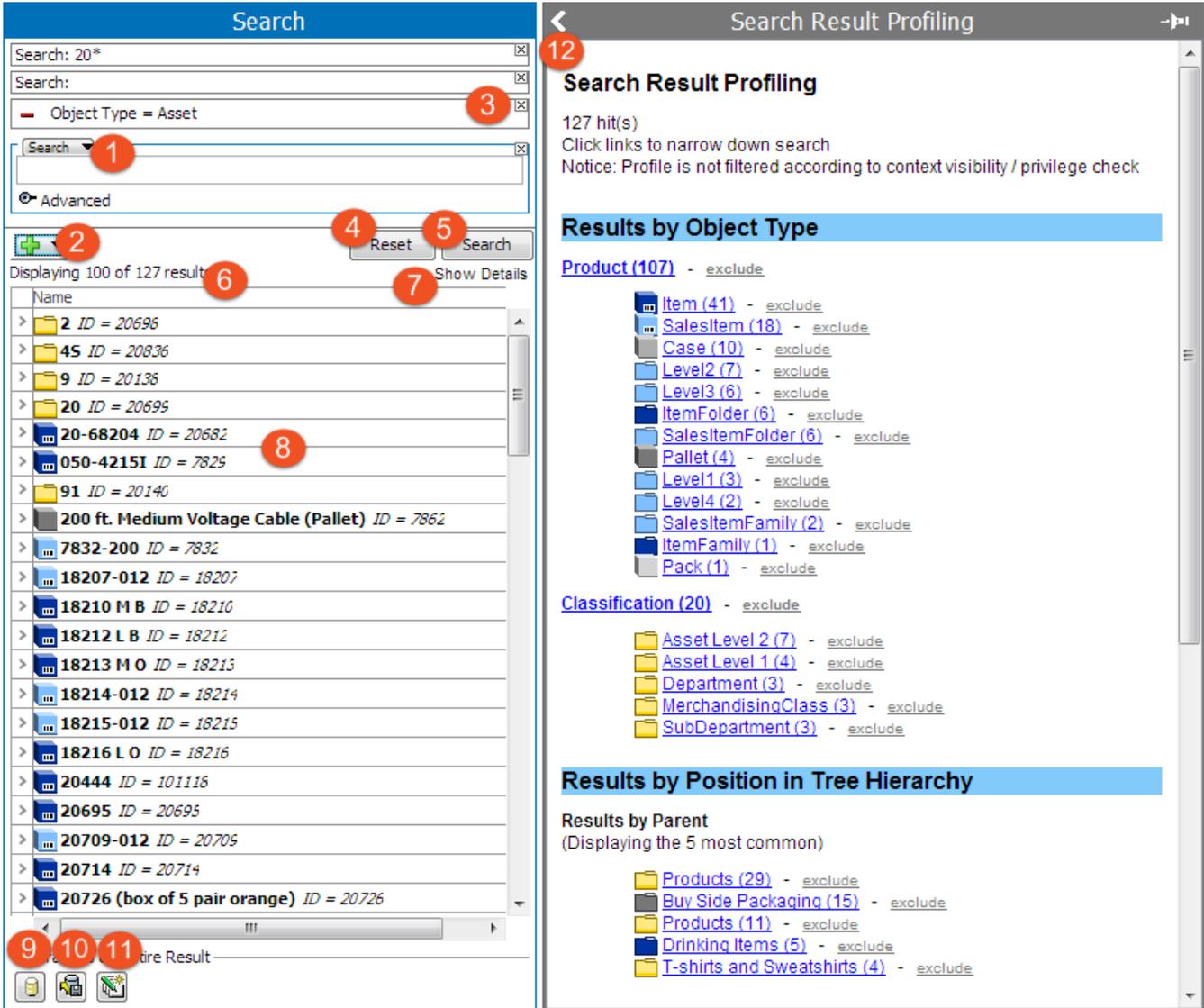
Search Overview

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

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

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

Search Elements



1. Search Criteria Type Selector - Click the text / triangle icon to display a list of available search criteria options. See **Basic Search Criteria and Functionality** within the **Search Overview** documentation for more

information.

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

Search Result Profiling Page

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

Search Result Profiling

87 hits
Click links to narrow down search

Results by Object Type

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

[Asset \(8\)](#) - [exclude](#)
 [TIFF Image \(7\)](#) - [exclude](#)
 [JPG Image \(1\)](#) - [exclude](#)

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

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

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

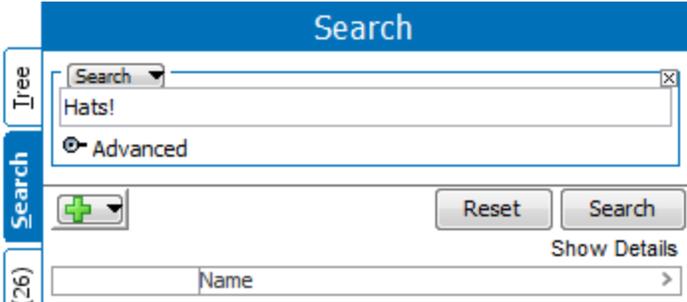
If you click **exclude** next to **TIFF Image**, an **Object Type Search Criteria** is added to the search, but this time as an **Exclude Criteria**. Hence, all objects of the **Object Type** "TIFF Image" will be excluded from the search result.

Basic Search Criteria and Functionality

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

The Standard Search Criteria

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

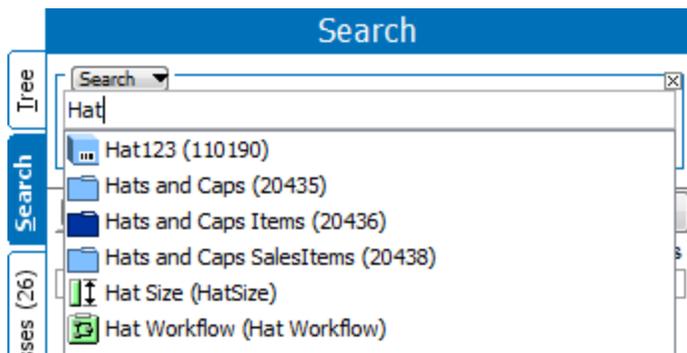


If you simply enter a text string and click the **Search** button, the search will find objects with an **ID**, and / or a **Name** and / or an **Attribute** value matching the entered string. Below you can see how you can further refine your standard searches.

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

Search Field Typeahead

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



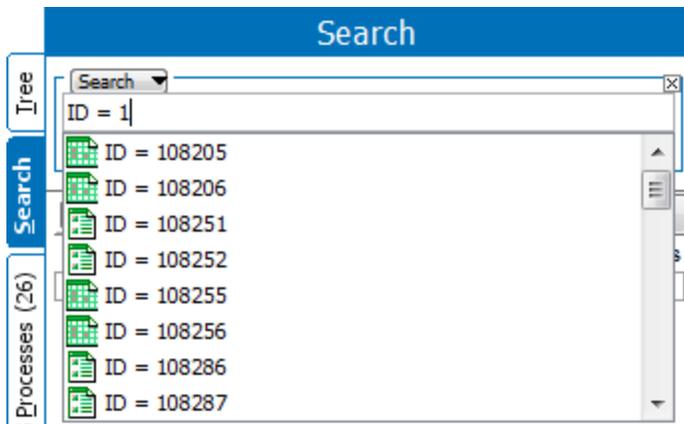
In the typeahead menu, objects are displayed with their relevant icon, then **Name** and **ID** in brackets, whereas **Attribute** values are shown as text.

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

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

Limiting Result to Matches on ID's

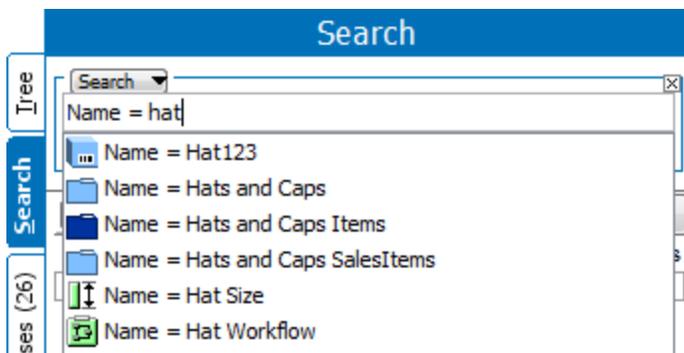
You can limit standard searches to match on **ID** only by entering "ID = " at the beginning of the text field as shown below.



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

Limiting Results to Matches on Name

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



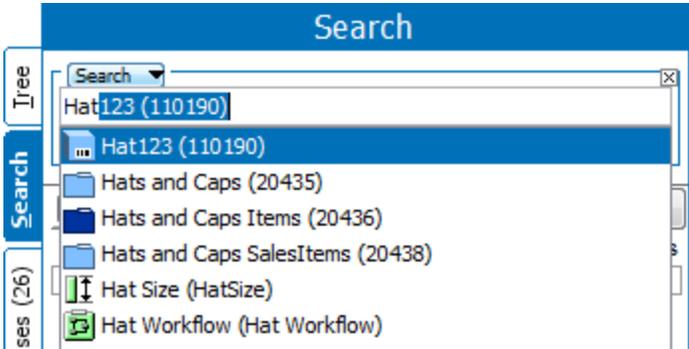
Note: E.g. "name" and "NAME" will work as well and spaces on each side of the equals sign are optional.

Attribute Value Searches

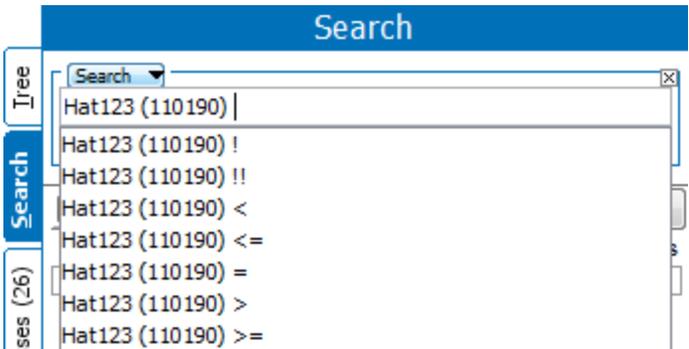
Using a standard search, you can limit the result to only match on values for specific **Attributes**.

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

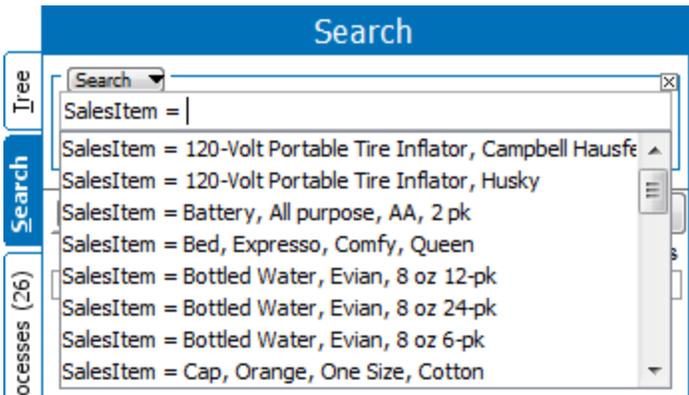
1. Start entering an Attribute **Name** or **ID**, then select the relevant Attribute from the typeahead menu, after which "Attribute Name (Attribute ID)" is inserted in the text field, then enter a search operator or enter a SPACE and select an operator from the typeahead menu and enter the value to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



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



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



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

Attribute Value Search Operators

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

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

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

= - Equal to operator.

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

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

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

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

Using Wildcards in Searches

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

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

Searches in Full Text Indexed Attribute Values

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

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

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

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

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

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

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

ISODATE Searches

If a user has an attribute with the validation type of ISODATE, where the date populated in the field is in the YYYY-MM-DD format, a user can search the populated attribute on objects using the following key words in the Search tab: **now, today, tomorrow, yesterday**.

While it does not matter if the ISODATE is set to 'Strict Validation' or not, it does matter that the date is written in the YYYY-MM-DD format. Any other format, including using slashes '/' instead of dashes '-' will not work.

In the example below, a user used this in a search to look for an object that has a particular date. In the case below, the user typed in the name of the date attribute 'ISODate', and then used an 'attribute value search operation' followed by the key work of "tomorrow". They then narrowed their search even further to just under one particular node, giving them the desired results.

The screenshot displays a search interface with the following components:

- Search Bar:** Contains the query `ISODate (ISODate) = tomorrow`. Below it, there is an "Advanced" search mode indicator and a filter set to "Search Below = Flashlights Items".
- Buttons:** "Reset" and "Search" buttons are visible.
- Results Summary:** "Displaying 1 of 1 results" and a "Show Details" link.
- Result List:** A table with a "Name" column showing a single result: `> flashlight case ID = 129666`.
- Search Result Profiling (Right Sidebar):**
 - Section: **Search Result Profiling** (1 hit(s), Click links to narrow down search)
 - Section: **Results by Object Type**
 - [Product \(1\)](#) - [exclude](#)
 - [Item \(1\)](#) - [exclude](#)
 - Section: **Results by Position in Tree Hierarchy**
 - Results below child nodes of Flashlights Items
 - [flashlight case \(1\)](#) - [exclude](#)
 - Results by Parent
 - [Flashlights Items \(1\)](#) - [exclude](#)

Combining Search Criteria

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

Thus, the search shown below:

The screenshot shows a search interface with the following elements:

- Tree:** Search: Name = Hat123, Search Below = Apparel
- Search:** Object Type = Product
- Buttons:** + (Add Criteria), Reset, Search
- Results:** Displaying 1 of 1 results, Show Details
- Table:** Name > Hat123 ID = 110190

...will generate the same results as:

The screenshot shows a search interface with the following elements:

- Tree:** Search Below = Apparel, Object Type = Product
- Search:** Search: Name = Hat123, Advanced
- Buttons:** + (Add Criteria), Reset, Search
- Results:** Displaying 1 of 1 results, Show Details
- Table:** Name > Hat123 ID = 110190

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

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

Using Exclude Search Criteria

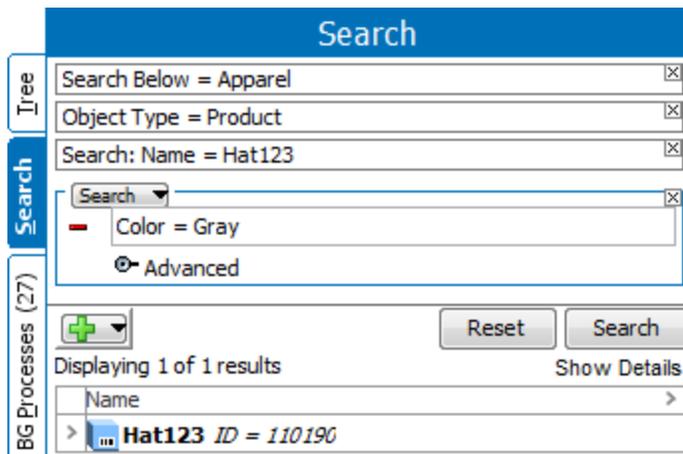
It is possible to negate all the different types of search criteria using the **Exclude Search Criteria** functionality.

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

The screenshot shows a search interface with the following elements:

- Tree:** Search Below = Apparel, Object Type = Product
- Search:** Search: Name = Hat123
- Buttons:** + (Add Criteria), Reset, Search
- Results:** Displaying 1 of 1 results, Show Details
- Table:** Name > Hat123 ID = 110190
- Dropdown Menu:** Add Criteria, Add OR, Add Exclude (selected)

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



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

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

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

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

Using the OR Operator

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

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

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

The screenshot shows a 'Search' window with a tree view on the left. The tree contains the following items:

- Tree
 - Search: Name = Hat123
 - Search: Color = Black
- Search
 - OR
 - Search: Name = Hat123
 - Search
 - Color = Gray
 - Advanced

At the bottom of the search window, there is a '+', 'Reset', and 'Search' buttons, and a 'Show Details' link. Below these is a search field containing 'Name'.

Advanced Options

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

The screenshot shows the 'Search' window with the 'Advanced' options panel expanded. The panel contains the following options:

- Advanced
 - Match Case on Names and Values
 - Include Inherited Values
 - Exclude values
 - Regular Expression
 - Include Data Containers

At the bottom of the search window, there is a '+', 'Reset', and 'Search' buttons, and a 'Show Details' link. Below these is a search field containing 'Name'.

Advanced Search Options

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

Note: ID searches are always case sensitive.

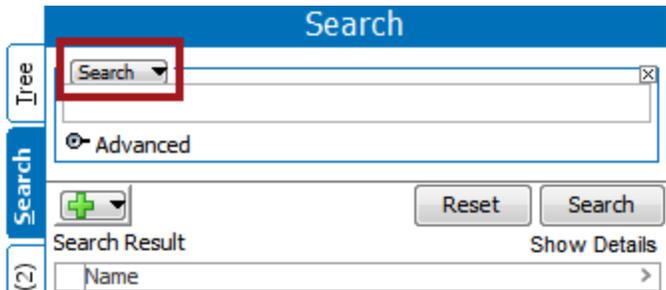
2. Include Inherited Values - When selected, attribute value search results will show objects where the match includes inherited values as well as objects where the match includes locally defined values.
3. Exclude Values - When selected, attribute values are not searched for the entered search term.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

- 4. Regular Expression - Search using regular expressions
- 5. Include Data Containers - Include in search results any search terms contained inside data containers

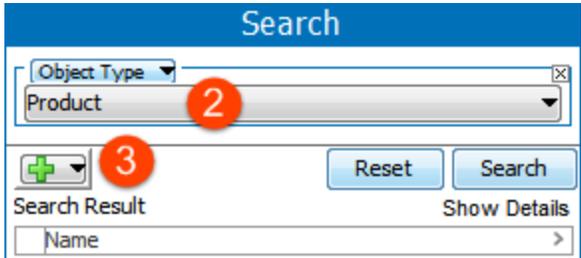
Object Type

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

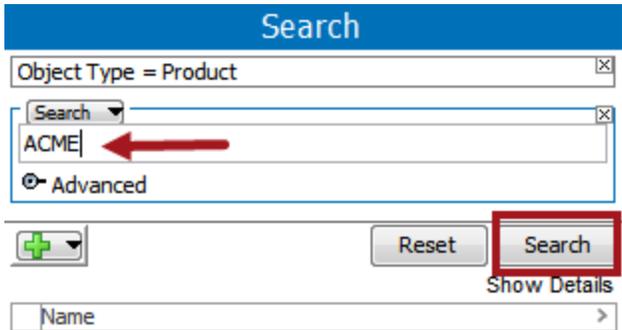
- 1. Navigate to the **Search** tab and click on it. You will see a small dropdown bar that defaults to **Search**. Click on the dropdown bar and select **Object Type**.



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



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



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

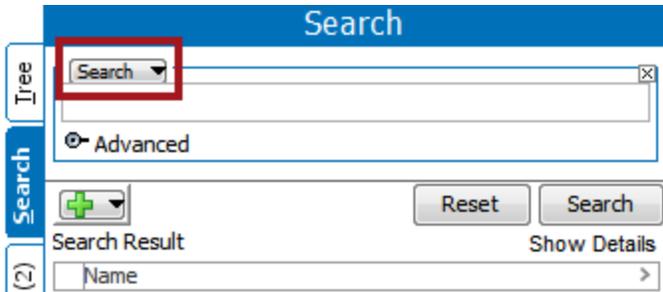
The screenshot displays the Stibo Systems search interface. On the left, the 'Search' tab is active, showing search criteria: 'Object Type = Product' and 'Search: ACME'. Below the search bar, there are buttons for '+', 'Reset', and 'Search'. The results list shows 6 items: '21933 ID = 21933', '27244 ID = 27244', 'Comfy Bed ID = 22155', 'Comfy Footboard ID = 22168', 'Comfy Headboard ID = 22167', and 'Comfy Side Rail ID = 22165'. On the right, the 'Search Result Profiling' section shows '6 hit(s)' and a link to narrow down search. Below this, 'Results by Object Type' shows 'Product (6) - exclude' and 'Item (6) - exclude'. 'Results by Position in Tree Hierarchy' shows 'Results by Parent' with categories like 'Beds Items (4) - exclude', 'Products (1) - exclude', 'Refrigeration Items (1) - exclude', 'Drinking Items (1) - exclude', and 'Products (1) - exclude'. 'Results by Value' shows 'Values matching "ACME"' (lowercase) with 'acme (7) - exclude' and 'Attributes with values matching "ACME"' including 'Brand Name (5) - exclude', 'Manufacturer Name (1) - exclude', and 'Supplier Name (1) - exclude'.

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

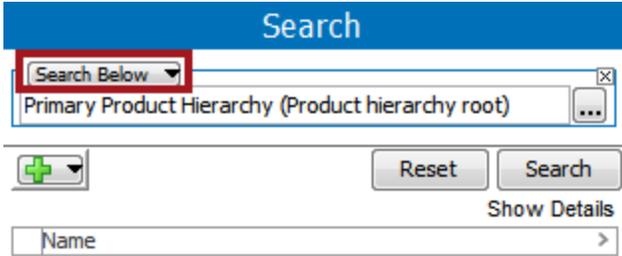
Search Below

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

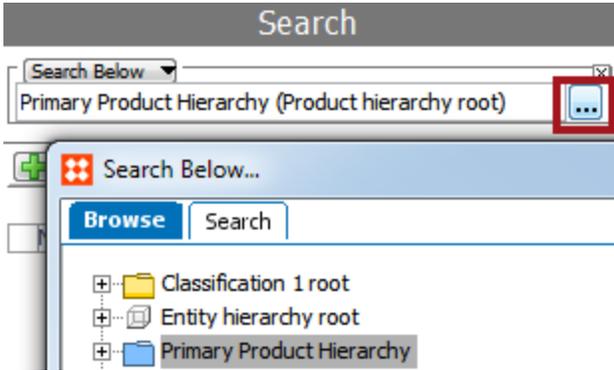
1. Navigate to the **Search** tab and click on it. You will see a small dropdown bar that defaults to **Search**.



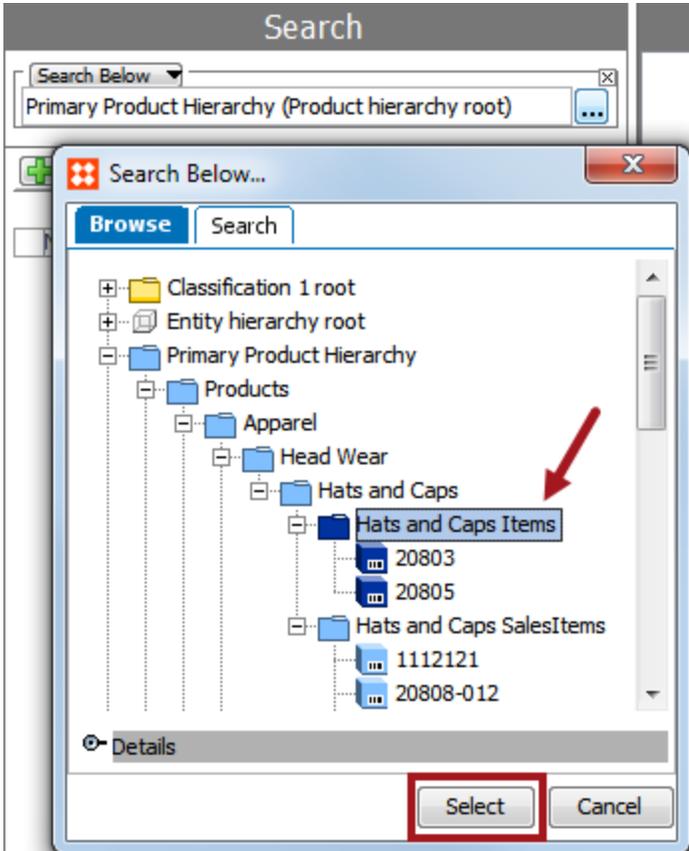
2. In the **Search Criteria Type Selector** select **Search Below**.



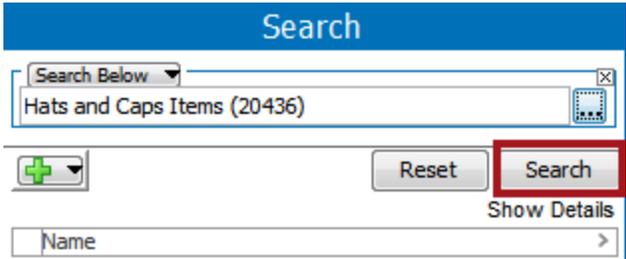
3. Click the ... button (ellipsis) to display the **Object Selector Dialog**.



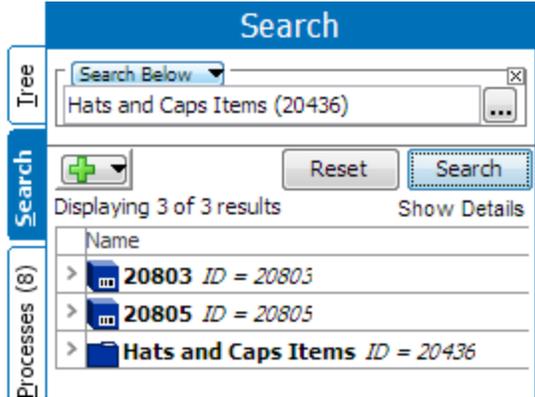
4. Select a node in the hierarchy and click the **Select** button.



5. Click the **Search** button



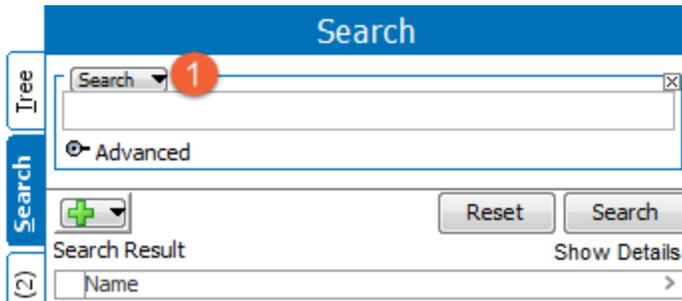
6. The Results displayed includes only items at or below the selected node.



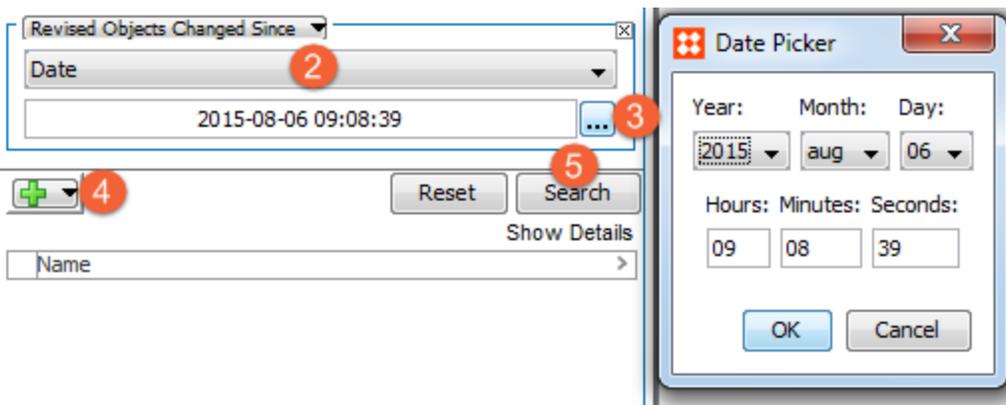
Revised Objects Changed Since

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

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



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



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

X
Revised Objects Changed Since

Date

2015-08-05 09:08:39
...

+
Reset Search

Displaying 8 of 8 results
Show Details

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

Search Result Profiling

8 hit(s)
Click links to narrow down search

Results by Object Type

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

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

[Asset \(3\)](#) - [exclude](#)

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

Special types (1)

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

Results by Position in Tree Hierarchy

Results by Parent
(Displaying the 5 most common)

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

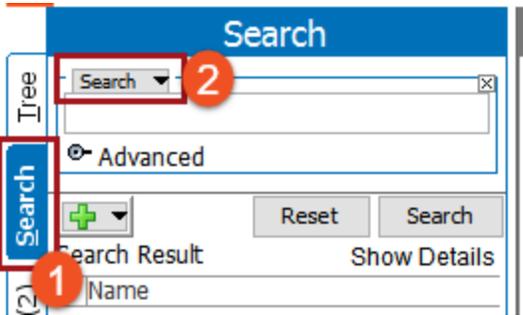
If this is still not as refined as needed, keep adding search boxes by pressing the green + symbol and typing in further information.

Searching Data Containers

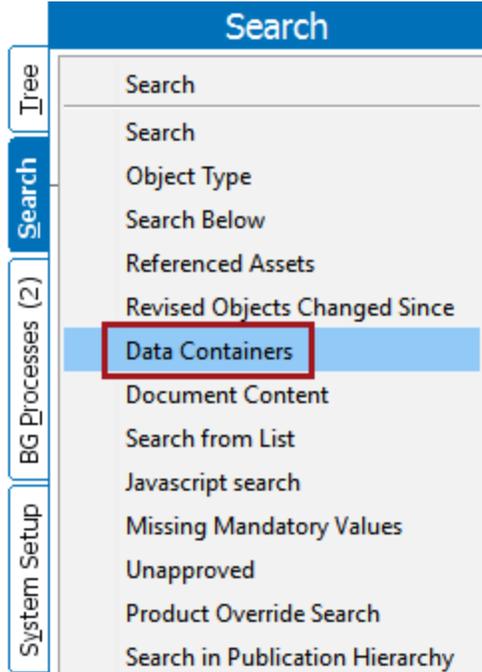
The Data Containers Search Criterion allows users to limit search results to only those entities for which data containers exist for specific data container types, or those entities for which specific attributes are linked via data containers.

To initiate a search of entities with information contained within data containers, users should follow these steps.

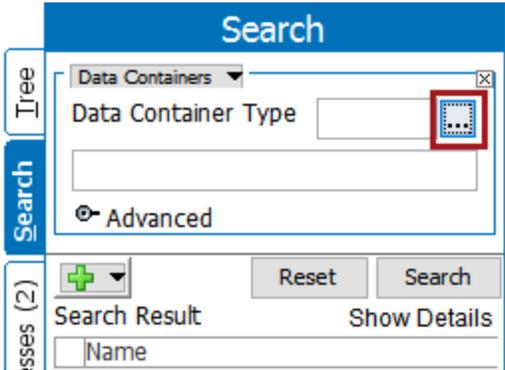
1. Click the **Search** tab, and then open the Search dropdown.



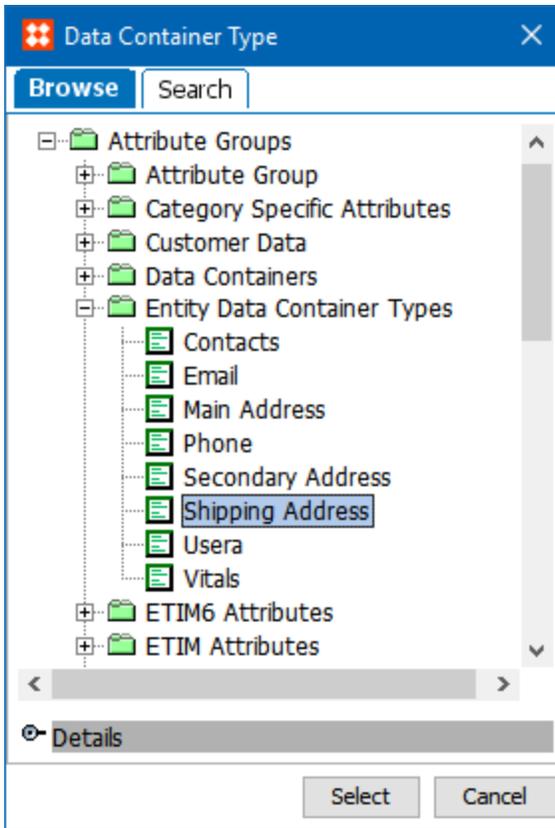
2. In the **Search Criteria Type Selector**, select the 'Data Containers' search criterion.



3. When the 'Data Containers' criterion is selected, two fields display below it. Data Container Type and an additional text input field. If a user clicks 'Search' without either of these fields populated, the search will return a list of all entities for which any data container of any data container type has been added.

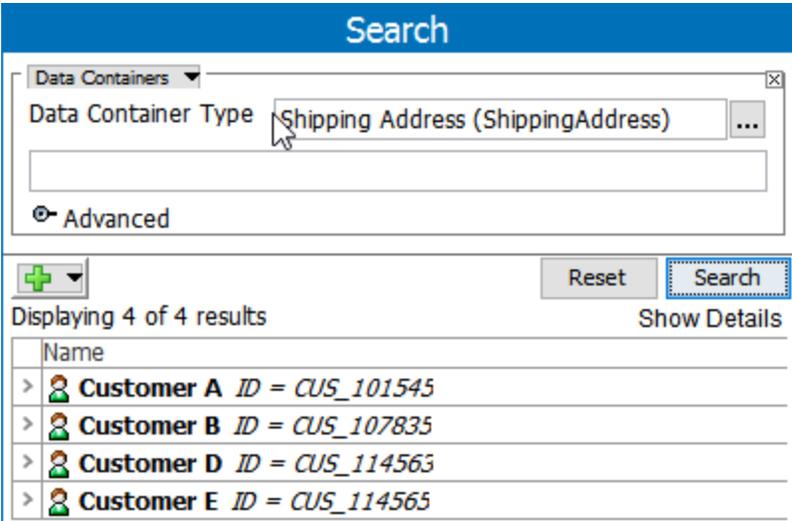


- Clicking the button beside the Data Container Type field will open a window in which the user may either Search or Browse for any data container types that have been created on the system. Selecting a data container type will limit search results to only those entities for which a data container has been added for that specific data container type. Select the relevant data container type and click **Select**.

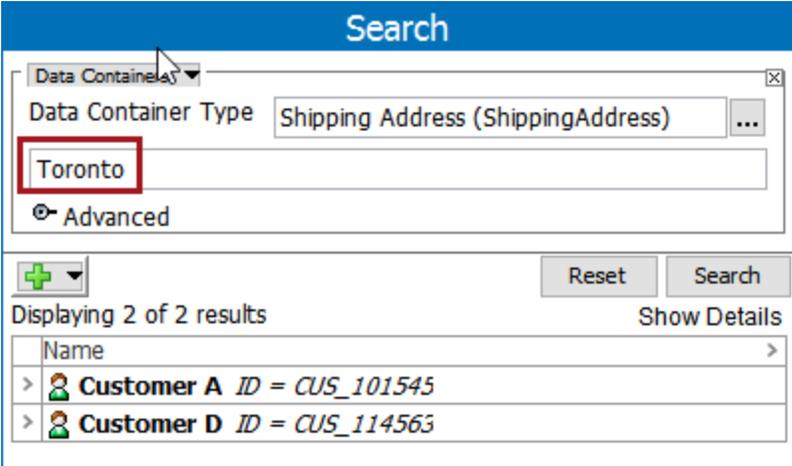


- To initiate a search for all entities for which the selected data container is added to, click **Search**. The search will return a list of entities for which that data container has been added, even if there is no content (no attribute values entered) in the data container.

In the example below, a user has elected to search for a data container type called 'Shipping Address' without refining the search any further. If the user selects 'Shipping Address' as the Data Container Type and clicks **Search**, a list of entities for which a data container has been added to an entity under the data container type 'Shipping Address' will display. In this instance, four entities are listed.



6. To further narrow the search, users may enter additional search terms in the text input field. To continue the example, if the user wanted to refine the search for entities with a 'Shipping Address' data container type to only include those data containers containing the value 'Toronto', the user would enter 'Toronto' in the input field. In this example, results returned from the search show two of the original four entities. This means that a 'Shipping Address' data container has been added to these two entities, and an attribute within those data containers also contains the value 'Toronto'.

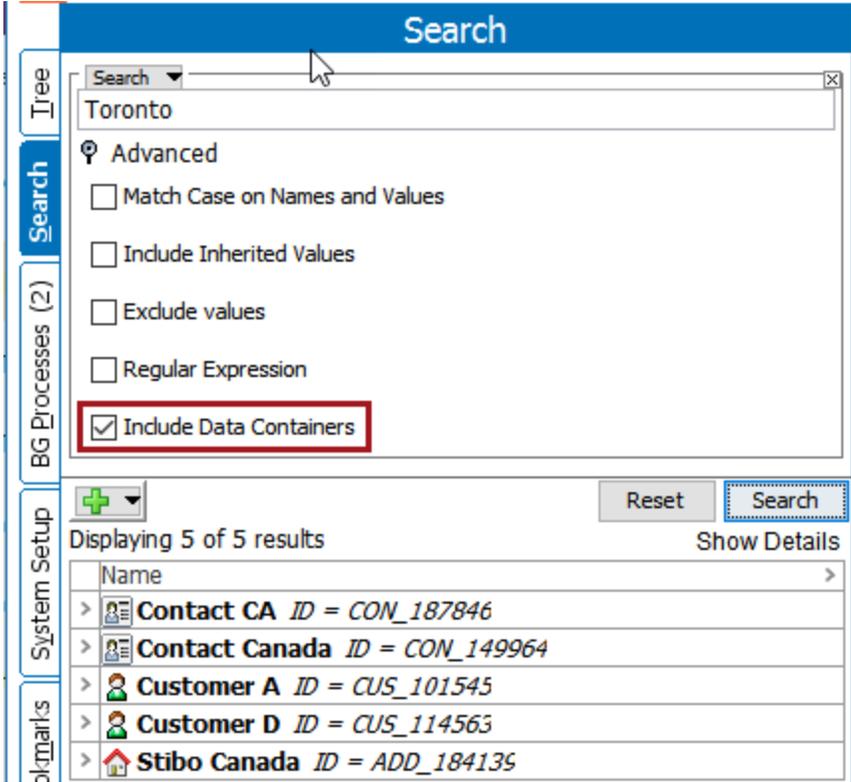


Searches involving data containers may also be initiated in a different way.

The standard search criterion (named 'Search') features additional options to further refine a search under an 'Advanced' flipper. One of these is called 'Data Containers'. When checked, this refinement enables data containers to be searched for values and include the applicable entities in the search results.



To continue the example further, let us say a user wanted to search for all instances of the value 'Toronto' occurring in the system. By checking 'Data Containers' under the advanced flipper and adding 'Toronto' into the text input field, the search results will list not only the Customer A and Customer D entities where 'Toronto' occurs inside a data container, but also instances of 'Toronto' that appear outside of data containers.

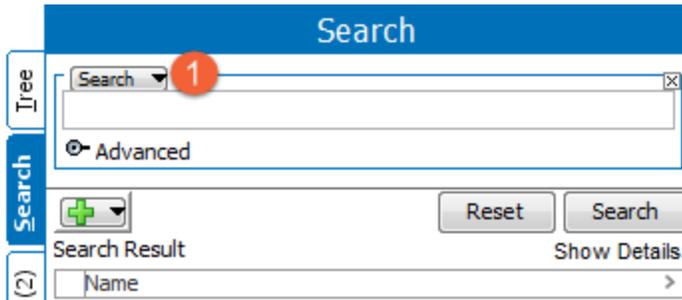


For more information on data containers and the terminology used in this topic, reference the System Setup guide and see the **Setting Up Data Containers in Workbench** documentation. For more information on adding and maintaining data containers, also reference the System Setup guide and see the **Adding and Maintaining Data Containers** documentation.

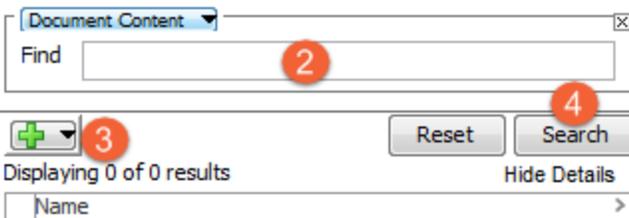
Document Content

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

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



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



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

Search from List

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

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

Search

Search from List

17739
20808
101567

Number of entries: 3

ID

Reset Search

Displaying 4 of 4 results Hide Details

Name
No Primary Image 55 17739
20670-012 17739
20808-012 20808
20808-013 101567

Search Result Profiling

4 hit(s)
Click links to narrow down search

Results by Object Type

[Product \(3\)](#) - exclude

[SalesItem \(3\)](#) - exclude

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

[Asset Level 2 \(1\)](#) - exclude

Results by Position in Tree Hierarchy

Results by Parent

[Hats and Caps SalesItems \(3\)](#) - exclude

[5 \(1\)](#) - exclude

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

JavaScript

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

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

Search

Tree

Search

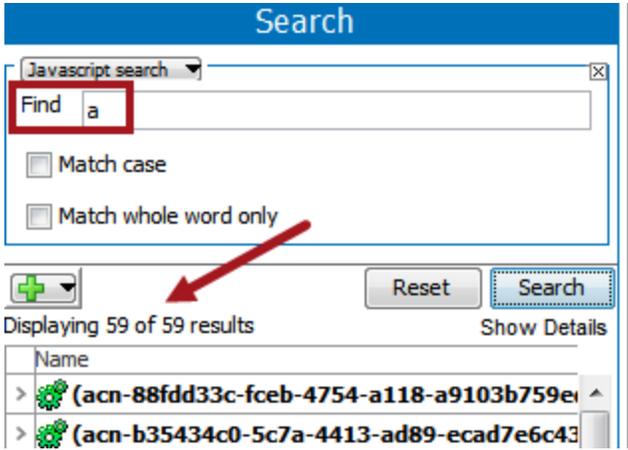
Advanced

Reset Search

Search Result Show Details

Name

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



Search Result Profiling

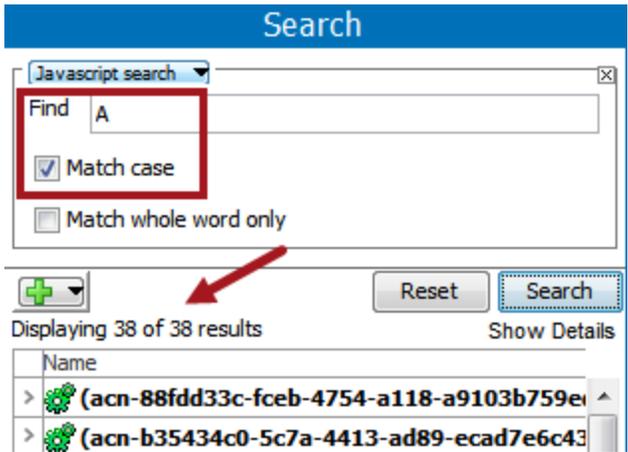
59 hit(s)
Click links to narrow down search

Results by Object Type

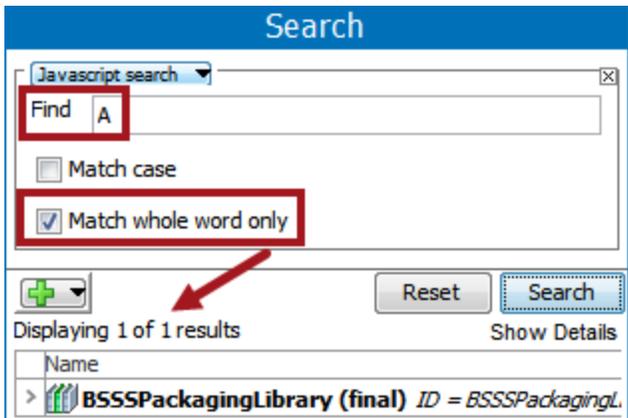
Special types (55)

- [Business Action \(47\)](#) - [exclude](#)
- [Business Condition \(8\)](#) - [exclude](#)

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



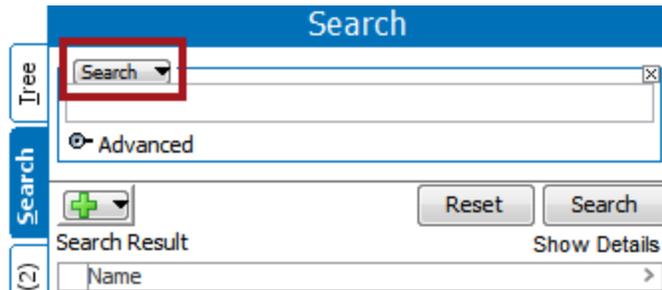
If **Match whole word only** is checked, it will return only results that are the exact criteria that were put in that stand alone. An example would be if the letter 'a' were typed into a search, and only results that had 'a' in it that stand alone somewhere in the JavaScript were returned.



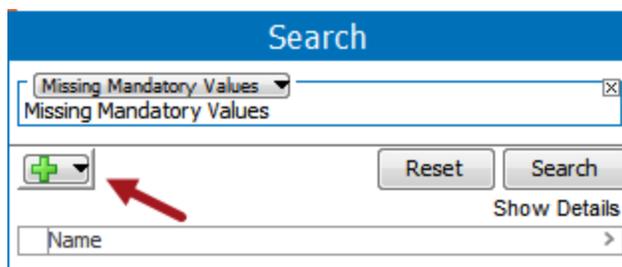
Missing Mandatory Values

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

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



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



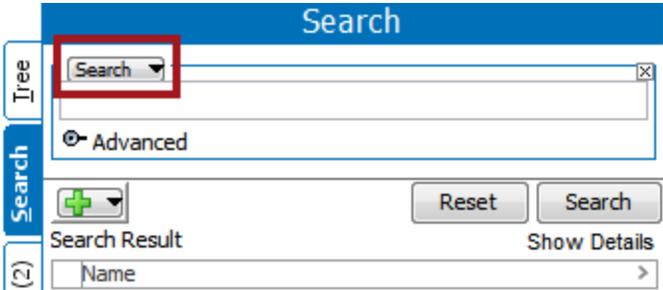
Note: As the **Missing Mandatory Values** search criteria only works on Product objects, using it in combination with other search criteria will limit the search result to such objects.

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

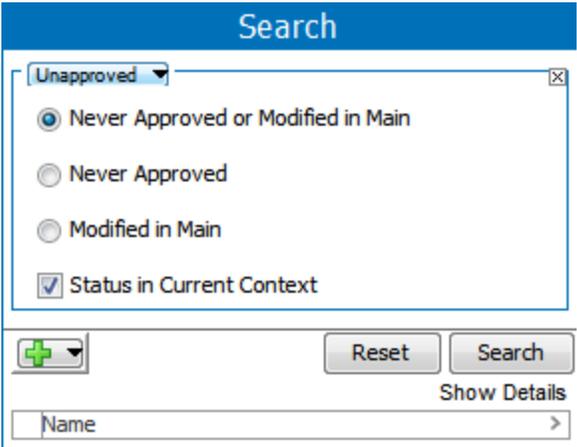
Unapproved

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

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



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



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

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

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

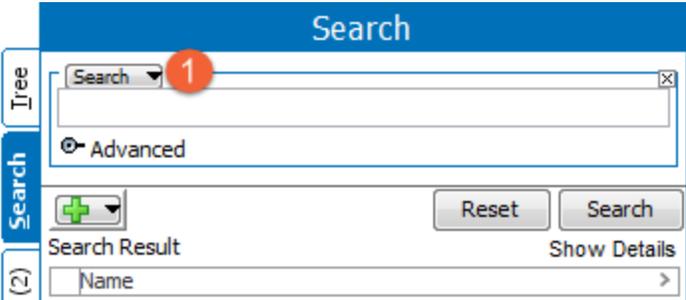
Status in Current Context: When this box is checked, it will only search in STEP under what is selected in the Context box.



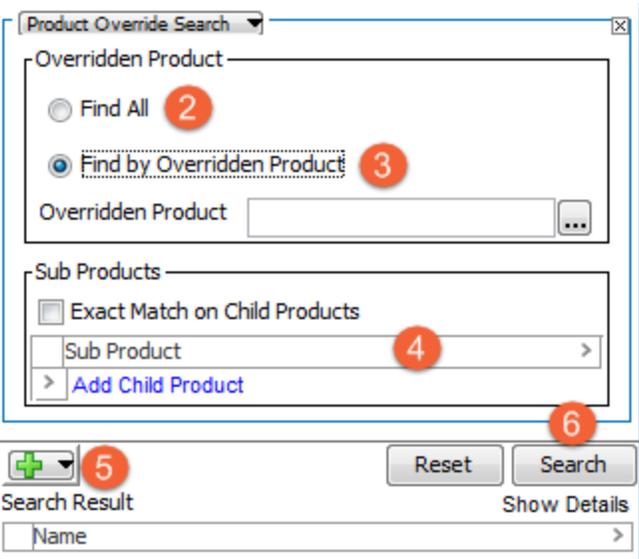
Product Override

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

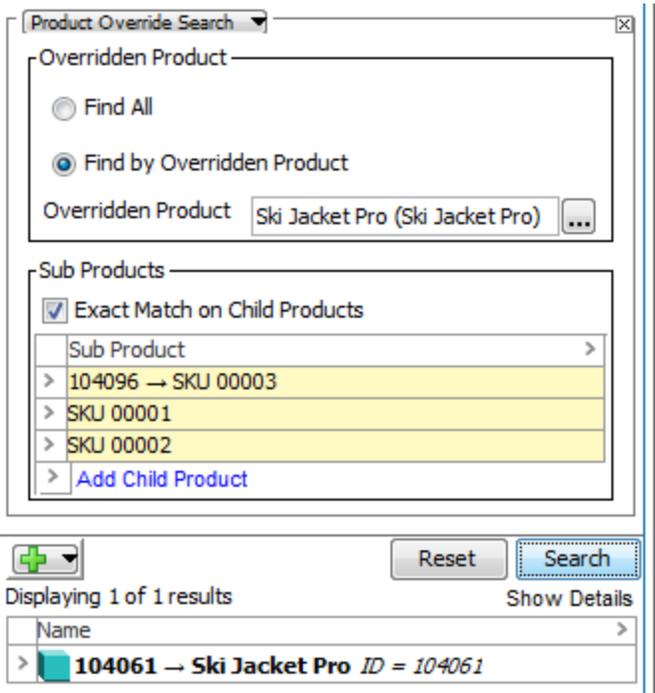
1. Navigate to the side **Search** tab and click on it. A small dropdown bar will appear. Click on the dropdown bar and select **Product Override**.



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



- 3. Select the 'Find by Overridden Product' option and either type in the product's name you wish to search or click the [...] to browse for a product to search.
- 4. Clicking 'Add Child Product' and selecting sub products will narrow the search further, requiring search results to have those specific sub-products linked to them. Checking the 'Exact Match on Child Products' box will require search results to have every sub-product you have specified—nothing more, nothing less.
- 5. Click the green plus sign to add additional search criteria. (Optional)
- 6. Click on **Search** to run the search and view results.



Search Result Profiling

1 hit(s)
Click links to narrow down search

Results by Object Type

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

Results by Position in Tree Hierarchy

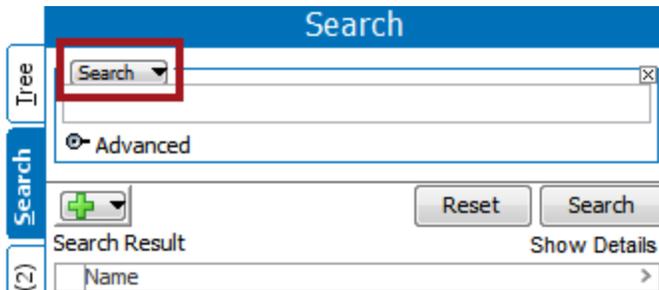
- Results by Parent
- [Level 2 \(1\)](#) - [exclude](#)

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

References and Referenced By

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

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



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

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

References

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

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

The screenshot shows the 'Search' interface in Stibo Systems. On the left, the 'References' section is active, with 'Reference Type' set to 'Owners Manual (OwnersManual)'. The checkbox 'Include Inherited References' is checked and highlighted with a red box. Below it, 'Find Missing References' is unchecked. The 'Reference Target' field is empty. At the bottom of the search panel, there are 'Reset' and 'Search' buttons, and a status bar indicating 'Displaying 4 of 4 results'. The results table shows four items:

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

On the right, the 'Search Result Profiling' section shows '4 hit(s)' and a link to narrow the search. Below are three summary sections:

- Results by Object Type**
 - [Product \(4\)](#) - [exclude](#)
 - [Product \(2\)](#) - [exclude](#)
 - [Item \(2\)](#) - [exclude](#)
- Results by Position in Tree Hierarchy**
- Results by Parent**
(Displaying the 5 most common)
 - [Tire Care Items \(2\)](#) - [exclude](#)
 - [Ski Jacket Light \(1\)](#) - [exclude](#)
 - [104061 → Ski Jacket Xtreme \(1\)](#) - [exclude](#)
 - [Products \(1\)](#) - [exclude](#)
 - [Ski Jacket Xtreme \(1\)](#) - [exclude](#)

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

The screenshot shows the 'Search' interface with the 'References' search type selected. A red arrow points to the 'Find Missing References' checkbox, which is checked. Below it, the 'Reference Target' field is empty. The 'Reference Metadata' field is also empty. The search results are displayed in a table with columns for Name and ID. The results are as follows:

Name	ID
> 20-68204	ID = 20682
> 050-4215I	ID = 7825
> 555-22346	ID = 6806
> 6642	ID = 6642
> 7130-03	ID = 6854
> 7133-12	ID = 8081

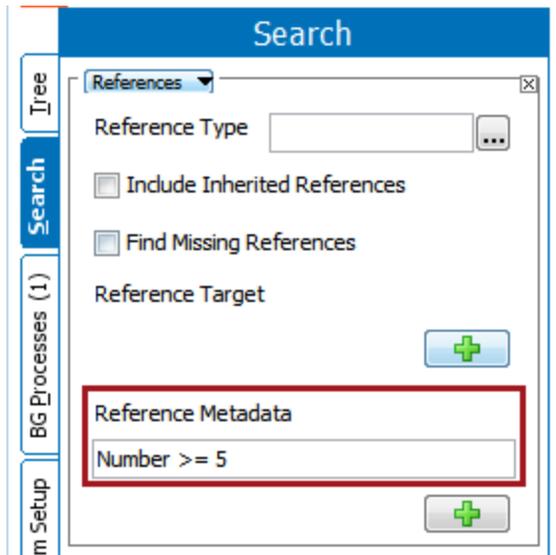
On the right side, the 'Search Result Profiling' section shows 98 hit(s) and a link to narrow down search. Below it, the 'Results by Object Type' section lists: Product (98) - exclude, Item (46) - exclude, SalesItem (43) - exclude, SalesItemFamily (5) - exclude, and ItemFamily (4) - exclude. The 'Results by Position in Tree Hierarchy' section lists: Products (21) - exclude, Products (8) - exclude, Hats and Caps SalesItems (7) - exclude, Drinking Items (5) - exclude, and Hanes T-shirts (5) - exclude.

Reference and Referenced By Metadata Attribute Value Searches

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

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

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

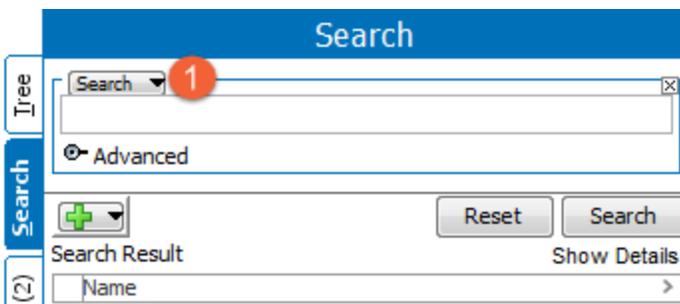


Note: It is not possible to perform searches on missing metadata values.

Workflow

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

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



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

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

Name
18207-012 18207
18214-012 18214
18215-012 18215
18217-012 18217
101164 101164

Search Result Profiling

5 hit(s)
Click links to narrow down search

Results by Object Type

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

Results by Position in Tree Hierarchy

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

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

Unpushed or Failed Assets

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

555-2033_M rev.1.0 - Status

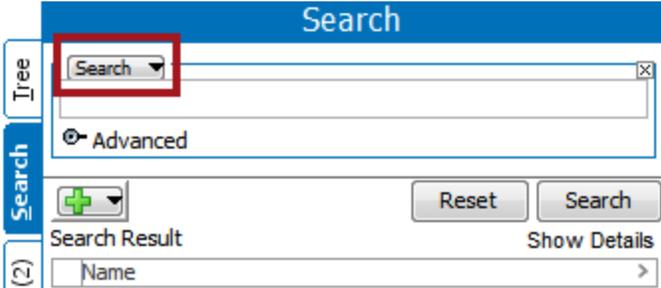
Images & Documents | References | Referenced By | **Status** | State Log | Tasks

Revisions
Workspaces
Translation
Asset Push Status

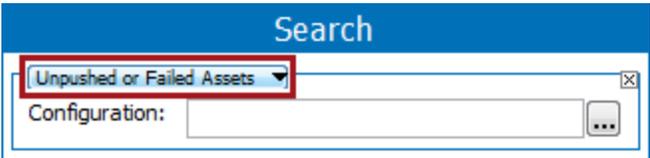
Configuration	Asset Push Status	Relative Path	Workspace	Visibility
> Asset Push Configuration 1 B	✓ Downloaded	AssetPushConfig1B/88/01/8801.jpg	Main	
> raw-main	Never been handled		Main	
> Asset Push Configuration 1 A	Asset not in workspace		Approved	

Approval status in all contexts
Hidden values
Diagnostics

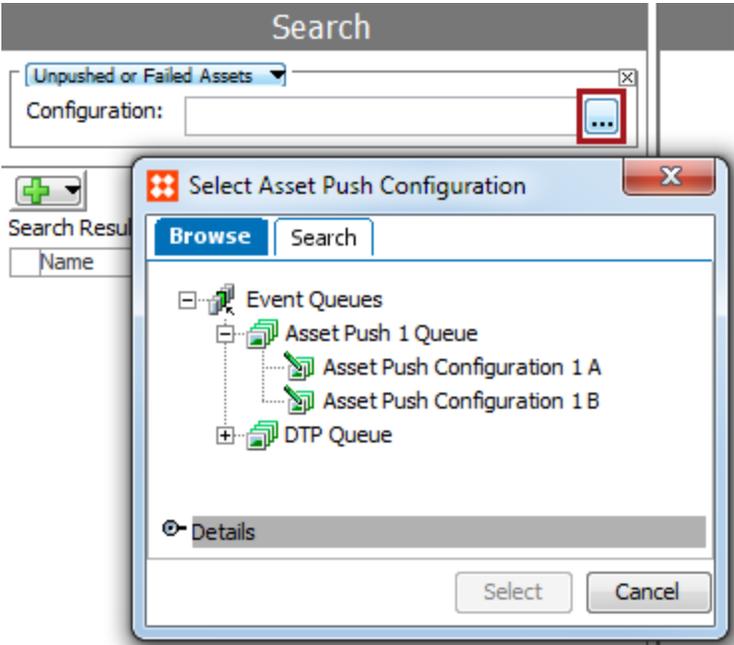
1. On the **Search** tab click the **Search** dropdown.



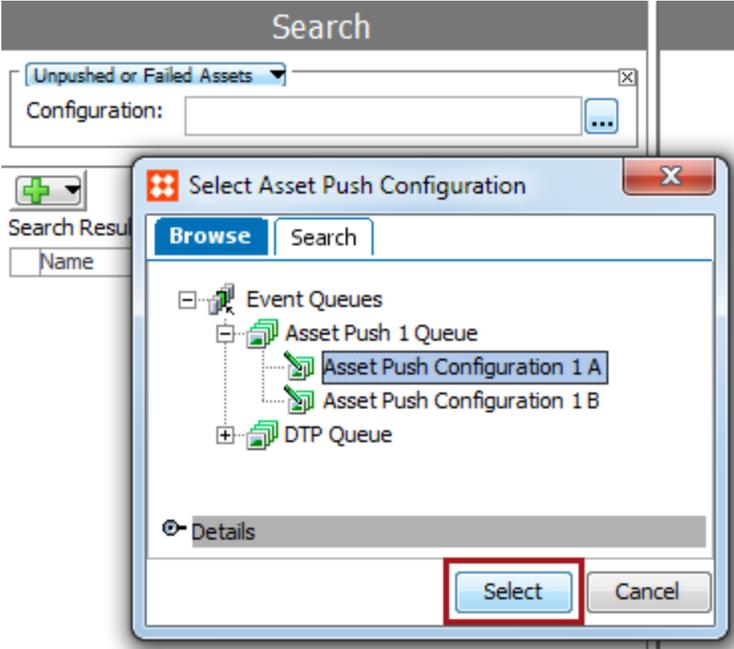
2. Select the **Unpushed or Failed Assets** option.



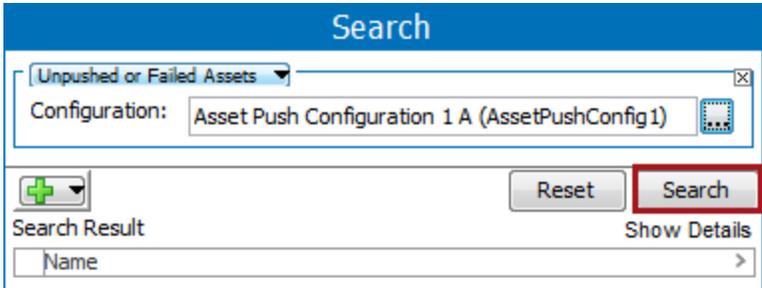
3. Click the ... (ellipsis) button to display the **Select Asset Push Configuration** dialog.



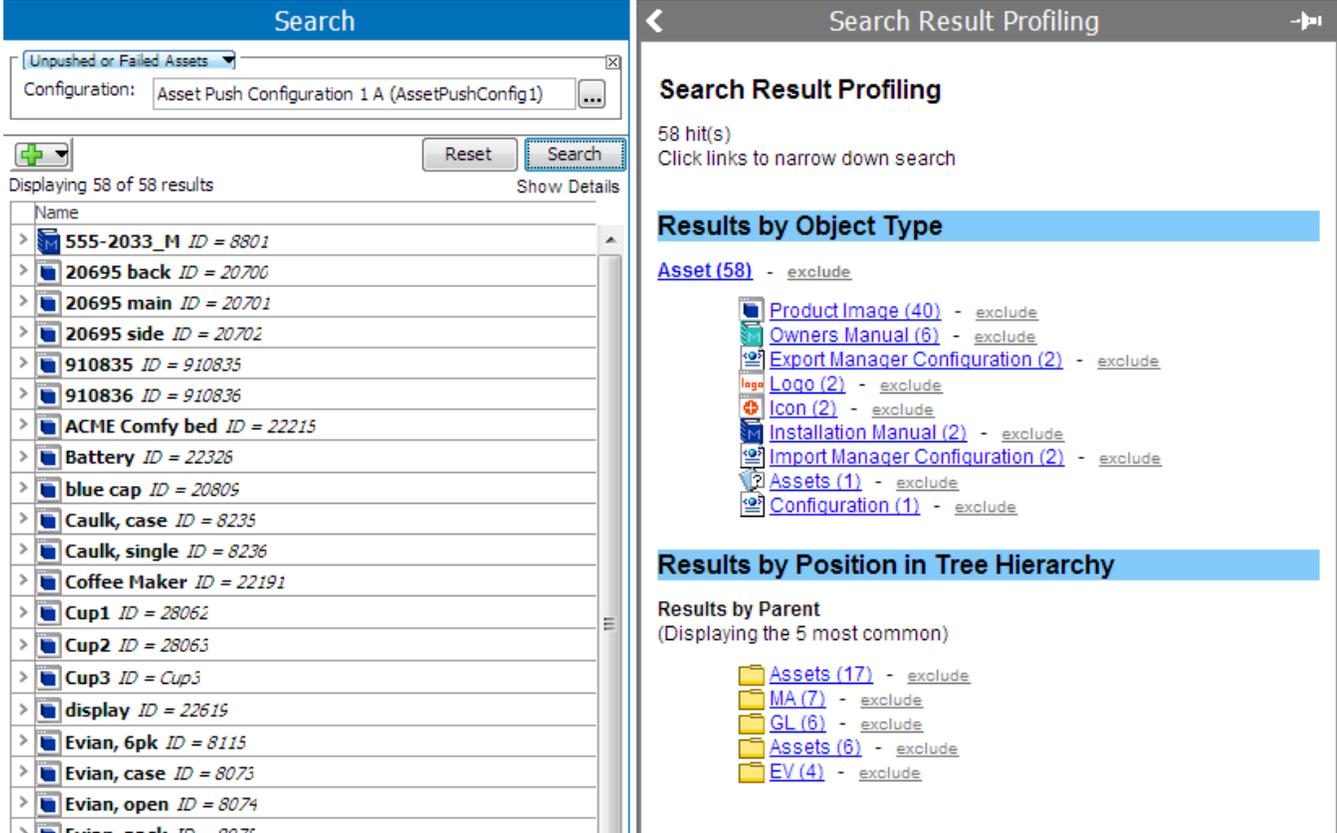
4. Select a configuration and click the **Select** button.



5. Click the **Search** button.



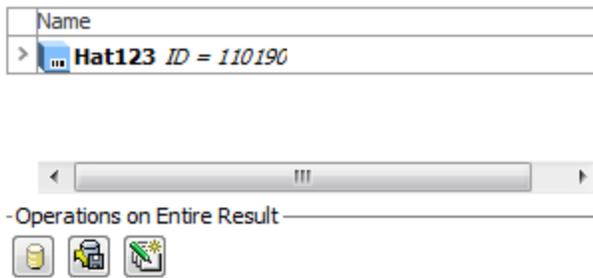
6. The Search Results List and Profiling information are displayed.



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

Search Operations

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



Exporting a Search Result

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

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

Saving a Search Result as a Collection

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

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

Bulk Updating a Search Result

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

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

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

STEP Workbench Keyboard Shortcuts

Within the STEP Workbench there are many shortcut key combinations that allow users to quickly navigate and make changes through the system. The following tables list and describe the options available for Shortcut Key options.

Basic Shortcuts

Shortcut	Description	Shortcut Key
Copy	Creates a duplicate of the information selected that can be pasted somewhere else.	Ctrl + C
Cut	Takes away information that can be pasted into a different location if desired.	Ctrl + X
Duplicate	This duplicates the item selected, with the option to duplicate references as well.	Ctrl + J
Goto	This brings the user to the Goto field in the upper right hand corner of the workbench screen where items are looked up.	Ctrl + G
Goto Next	Finds the next item that most closely matches what the user is looking for. The results may differ depending on what tab the user is in and working with, or what area is selected as active.	Ctrl + E
Help	When Workbench is open, it will populate another window that provides all of the Online Help Documentation.	F1
Next	Shifts the focus to the next cell.	Tab
Paste	When information that was either cut or copied from before is placed into an alternate area.	Ctrl + V
Previous	Shifts the focus to the previous cell.	Shift + Tab
Redo	Goes to the changed state, if the change was reversed.	Ctrl + Shift + Z
Reload	Reloads the workbench and updates to any changes made.	F5
Select All	When the desired area is clicked in or is already the active area, pressing this key combination will choose everything in this particular area.	Ctrl + A
Undo	Goes back to the original state before the change was made.	Ctrl + Z

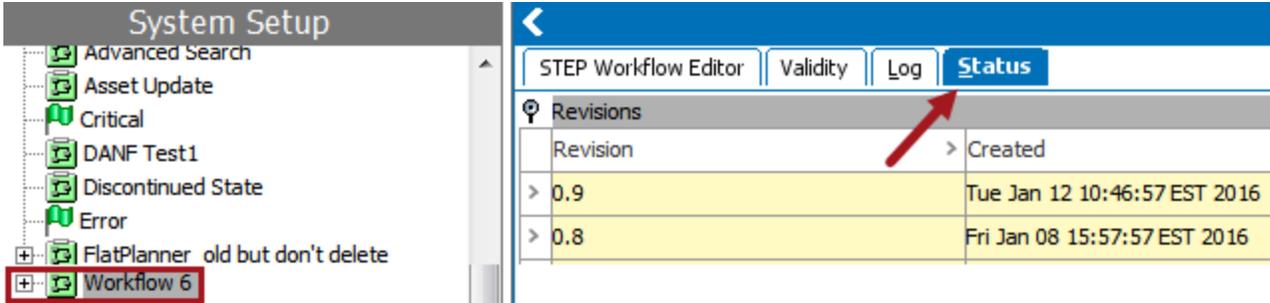
Navigate to Main Side Bar Tabs in Workbench

Shortcut	Description	Shortcut Key
Background Process Tab	Unless a product is being viewed, this will bring the user to the Background Processes tab. If a user is on a product, this key combination will not transpire.	Alt + P
Bookmarks	Brings the user to the Bookmarks side tab.	Alt + M
System Setup Tab	Brings the user to the System Setup tab.	Alt + Y
Search Tab	Leaves the user looking at what they were on in the main frame, but brings up the Search Tab along the left hand side.	Ctrl + F
Tree Tab	This will bring a user to the Tree Tab only if not viewing an item in Tree in the main screen, or having an item still show up in the main screen even though navigation has been away from it.	Alt + T
Workflow Tab	Navigates to the STEP Workflows tab.	Alt + W

Navigate to Horizontal Tabs within Main Sidebar Tabs

To navigate to the horizontal tabs within the main tabs in workbench, press Alt + (the letter underlined on the tab).

For example, if a workflow is selected within System Setup, pressing **Alt + S** displays the **Status** tab for the workflow being viewed because 'S' is the underlined letter for the Status tab.



Note that options for shortcut keys to horizontal tabs vary depending on what item is selected and in what main tab a user is located (Tree, Search, Background Processes, System Setup, Bookmarks, and STEP Workflow). Not all tabs have underlined letters for shortcut key options.

General Shortcuts Useful in Workbench

Shortcut	Description	Shortcut Key
Add Bookmark	When on an object and this is pressed, it will add the item to the bookmark list on the Bookmark tab.	Ctrl + D
Add Element	When adding various elements, pressing this key combination will often (not in all cases), bring up a dialogue window allowing the user to add to the desired list.	Ctrl + Plus
Approve Object	When in Main, approves an object that was previously unapproved.	Ctrl + Shift + J
Mark Different (On multi-product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, selecting this key combination will mark all areas that are different green.	Shift + F12
New Window	With STEP Workbench open, this will open an additional STEP Workbench window.	Ctrl + N
Remove Element	When deleting various elements from lists or rows, pressing this key combination will often remove the desired connection or item.	Ctrl + Minus
Rotate Table (On Multi-Product display)	In Tree, when viewing multiple products at once, or when viewing the horizontal Sub Products tab for an item, this rotates the table view if the table is the active area.	F11
Toggle attribute values selection between blinking cursor and blue filter	When on a field that is editable, selecting F2 allows the user to write in the field. When pressed again, the entire field turns blue, rendering it entered and non-editable, unless F2 is pressed again or the field is clicked into again.	F2

Insert Options

Shortcut	Description	Shortcut Key
Insert Action Set	In System Setup, when in the Action Sets, pressing this key	Ctrl + Shift

Shortcut	Description	Shortcut Key
	combination will create a child Action in an Action set.	+ S
Insert Asset	The Create Asset dialogue appears when in Tree.	Ctrl + Shift + A
Insert Attribute	Displays the Create Attribute dialogue in System Setup.	Ctrl + Shift + T
Insert Attribute Group	In System Setup, this creates a new Attribute Group if sitting on the proper level.	Ctrl + Shift + I
Insert Background Process to Monitor Deadlines / STEP Workflow Deadline Monitoring	This allows a user to set up a background process to monitor states with exceeded deadlines in the desired time frame.	Ctrl + Shift + D
Insert Character Tag	When typing in a field and this is selected, a dialogue appears allowing the user to select from character tags.	Ctrl + R
Insert Classification	In Tree, this inserts a new yellow folder, or classification.	Ctrl + Shift + C
Insert Classification Root	In Tree, a new Classification Root or top node yellow folder is created.	Ctrl + Shift + R
Insert Dimension	In System Setup, when sitting on the top node for contexts, clicking these keys will bring up the dialogue to create a new dimension.	Ctrl + Shift + D
Insert Dimension Point	In System Setup, when on a dimension, selecting this will create the dimension point.	Ctrl + Shift + M
Insert Group	In System Setup, when on the node that houses Users and Groups, selecting this key combination will create a new group.	Ctrl + Shift + G
Insert List of Values	In System Setup, when sitting on the top node for List of	Ctrl + Shift

Shortcut	Description	Shortcut Key
	Values, pressing this will bring up the dialogue to create a new List of Values.	+ L
Insert non-breaking space	Enters a non-breaking space when editing attribute values.	Ctrl + Enter
Insert Orphan Attribute	When on a product, this will insert an orphan Attribute, which will appear in italics.	Ctrl + Shift + O
Insert Product	When in Tree, this will create a new object under the one selected.	Ctrl + Shift + P
Insert Special Character	When in a field that allows typing, selecting this brings up a list of characters that can be selected and inserted into the field.	Ctrl + Shift + E
Insert STEP Workflow	In System Setup, when on the top node for workflows, or when inside the node for workflows, selecting this will bring up a new STEP Workflow Designer window to create a new workflow.	Ctrl + Shift + R
Insert Workspace	In System Setup, when on a workspace, selecting this key combination will create a different workspace.	Ctrl + Shift + W

Linking Options

Shortcut	Description	Shortcut Key
Link Asset	When on References or References By tab, this allows asset links or references to be selected and put into the appropriate folders. Note that the Reference Type can be changed from the drop-down menu in the dialogue that appears.	Ctrl + Shift + F
Link Attribute to Classification	To link an Attribute to an item, select the item that needs the attribute and select this key combination. Linked attributes will appear in the References tab under the 'Attributes' flipper.	Ctrl + Shift + Y
Link Attribute	When on a product, selecting this key combination links an attribute to a product.	Ctrl +

Shortcut	Description	Shortcut Key
to Product		Shift + K
Link Classification to a Product	This links a classification to a product. It can be seen under the Reference tab under the 'Linked Attributes to Classifications Hierarchy' flipper.	Ctrl + Shift + H
Paste Link	Creates a new reference (pointer or link) to an existing / copied object. An example would be if the user copied a SKU from a blue folder and pasted it into the yellow folders. Note that object types need to be compatible.	Ctrl + L
Link Product / Create Link	When on References or References By tab, this allows product links or references to be selected and put into the appropriate folders.	Ctrl + Shift + Q

Style Options

Shortcut	Description	Shortcut Key
Bold	When typing in a field, this activates bold text.	Ctrl + B
Character Tag	Opens the Insert Character Tag dialog for adding character tags to attribute values.	Ctrl + R
Italic	When typing in a field, this activates italic text.	Ctrl + I
Non-breaking Space	Enters a non-breaking space when editing attribute values.	Ctrl + Enter
Special Character	Opens a dialog showing the most recently used special characters, as well as an option to select to see all special characters. Allows user to select a special character to insert when editing attribute values.	Ctrl + Shift + E
Style	This key combination can be pressed to bring up the Style box, where there are a number of styles to choose from.	Ctrl + Y
Rich Text Editor	Opens the Rich Text Editor in the STEP Workbench when editing an attribute value.	Alt + F2

Shortcut	Description	Shortcut Key
Paste and Match Style	When in a field, if 'text A' is copied from one area and is going to be pasted into 'text B' that is a different style, pressing this key combination will make it so the copied 'text A' will past into 'text B' with the style of 'text B'.	Ctrl + Shift + V

Flatplanner Shortcuts

Shortcut	Description	Shortcut Key
Save (In Flatplanner)	This save what is being worked on.	Ctrl + Alt + S
Zoom In (In Flatplanner)	This zooms in on what is being worked on.	Ctrl + Plus
Zoom Out (In Flatplanner)	This zooms out of what is being worked on.	Ctrl + Minus