

USER WEB UI USER GUIDE

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

StiboSystems

STEP Trailblazer 8.1

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Introduction

About This Guide

The STEP User Web UI Guide contains information about STEP Asset Web UI, STEP User Web UI and STEP Supplier Web UI.

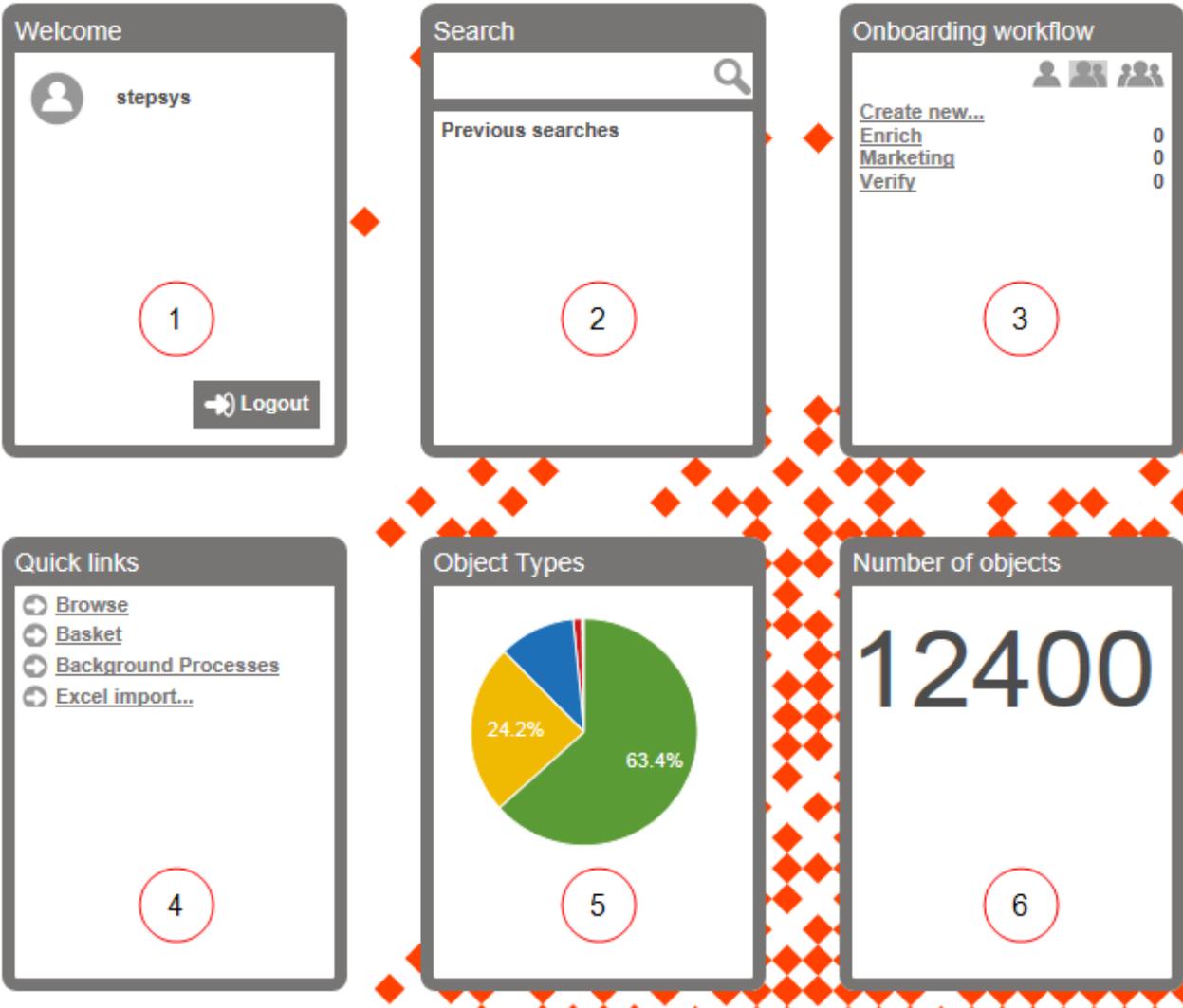
Accessing the Web UI

Any of the three STEP Web UIs can be accessed via a browser.

STEP User Web UI

The purpose of the STEP User Web UI is to enable users to search for and navigate to relevant products and assets. Products and assets can be edited and saved to database from within the STEP User Web UI and assets can be uploaded and downloaded. Also, a user specific basket lets you collect assets that you may want to investigate further, edit or download.

User interface



The home page screen has got 6 widgets:

1. Welcome: Information about what user is logged into the Web UI plus a button to log out.
2. Search: Finds node with an ID or name matching the search phrase.
3. Onboarding workflow: Shows task count for a STEP Workflow, which is automatically generated, when creating a user Web UI, see "[Initiate into workflow](#)" on page 8
4. Quick links: This provides quick navigation to navigate the node tree, see "[Initiate into workflow](#)" on page 8, view the basket, see info about asset download background processes & Excel import that navigates to a import screen.
5. Object Types: Shows a piechart of object type count under the "Stibo Area" product.
6. Number of objects: Shows the number of objects under the "Stibo Area" product.

Some of these widgets are just put on the home screen to show some of the capabilities of the Web UI. It will probably not make sense to use them without changing the settings for them. The "Onboarding workflow" is just meant as an example of how to setup a STEP Workflow in the Web UI. You will most likely replace it with your own STEP Workflow or simply delete the object. The same applies to "Object Types" and "Number of objects" widgets - you will probably delete these or reconfigure them to show information that is useful in your usage scenario.

Logging in

To log in to the STEP User Portal you must enter a valid user name and password. Then click the Login button.

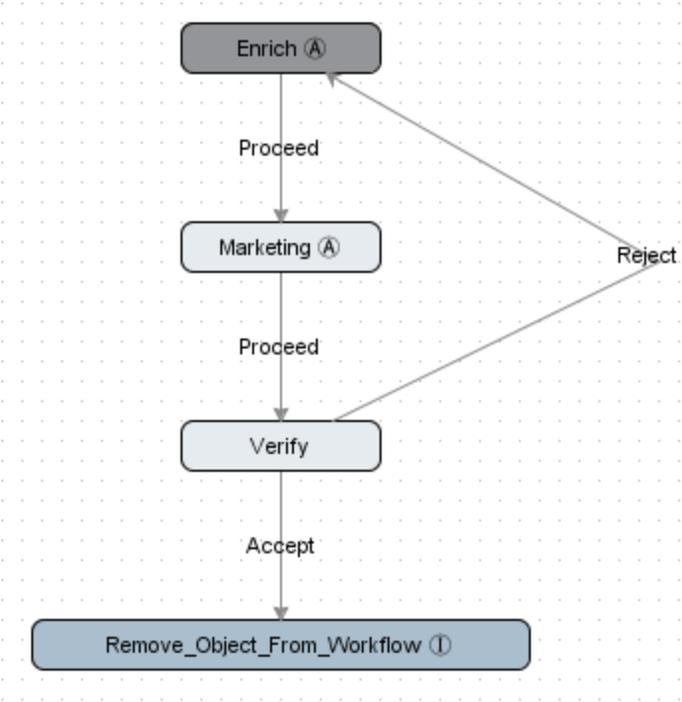
STEP Customer Data Portal



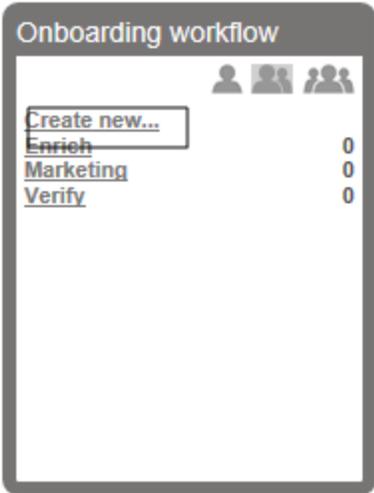
The image shows a login form for the STEP Customer Data Portal. It features two input fields: 'Username' with the text 'user' entered, and 'Password' which is currently empty. To the right of the password field is a 'Login' button with a right-pointing arrow icon.

You will now be logged in to the STEP User Portal and are able to view, edit, and save product and asset information based on the privileges applied to you by your administrator.

STEP Workflow



The User Portal is by default set up to have a STEP Workflow, which is used in the Status Selector Widget "Onboarding workflow". This is just meant as an example of how to setup a STEP Workflow in the Portal. The Status Selector widget shows the number of tasks for each state that it has been configured to show.

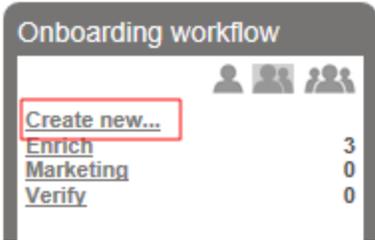


In the top right corner of the widget 3 icons are shown. These are toggle buttons that controls what kind of tasks that should be counted for the shown states.

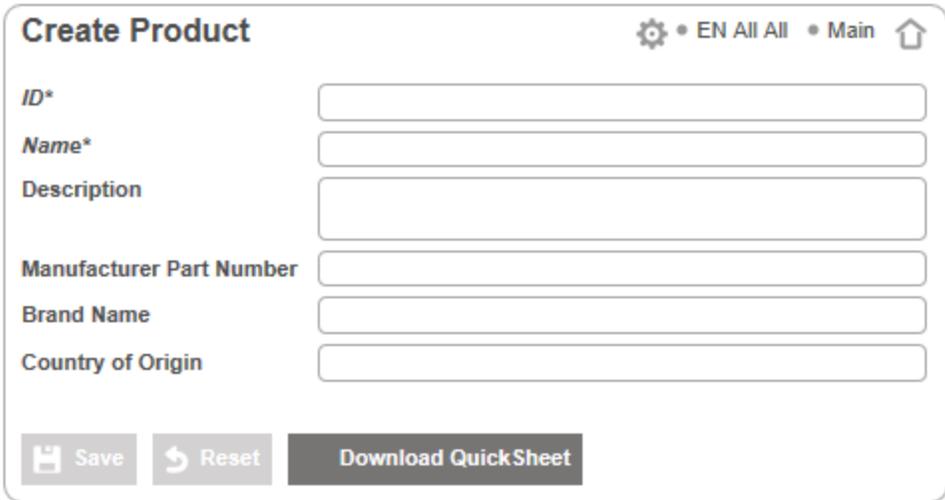


- 1.  Click this toggle to show only tasks assigned directly to the user.
- 2.  Click this toggle to show only tasks assigned directly to the user or to a group that the user is member of.
- 3.  Click this toggle to show all tasks no matter what group or user they are assigned to.

Initiate into workflow



Click on "Create new" link in the "Onboarding workflow" to open a window, where you can create a new node, that will automatically be initiated into the STEP Workflow upon creation.



Create Product EN All All Main

ID*

Name*

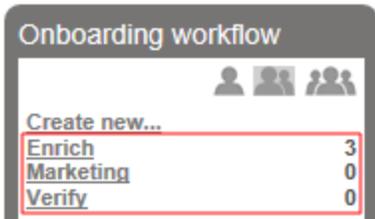
Description

Manufacturer Part Number

Brand Name

Country of Origin

Task List



Click on one of the state links in the Onboarding workflow widget to get a list with details about these tasks.



Notice the column "AssignToMe". Each task has an icon that allows the user to assign the task to him self () or assign it back to the previous task owner or default group (), if the icon is clicked.

Users can conveniently edit Workflow Variables and Status Flags directly from a Web UI Task List. When a Workflow Variable Header is configured on a Task List / Node List, the displayed values are editable by double-clicking in the table cell when utilizing the Multi Edit Display Mode. Editing capabilities vary based on the configuration of the variables and the attribute Validation Base Type. For example, a workflow variable with a List of Values (LOV) Validation Base Type will only allow users to select a value from the applicable LOV.

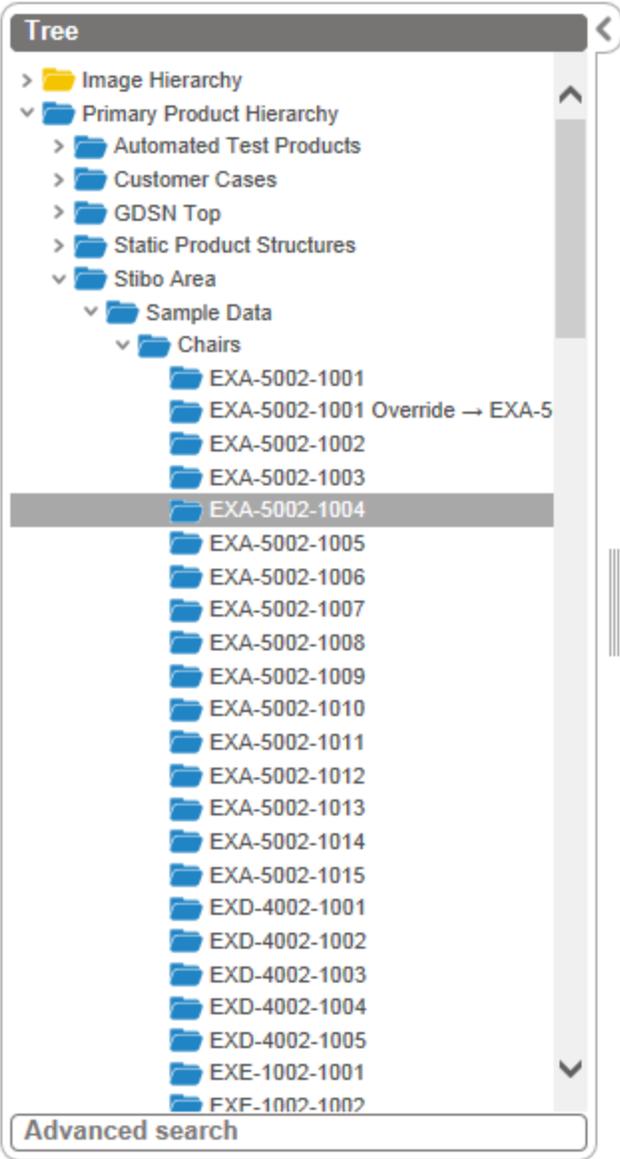
Functionality is similar for Status Flag Header values. A user can select between the different status flags that have been configured for the Workflow.

ID	Title	Status flag	Workflow Variable	Workflow status	
20824-014	110709	20824-014	High	Digital Assets	Sales Item Creation:Copy Writing Item Creation:Copy
20824-015	110710	20824-015	Error (Error)		ation:Copy Writing Item Creation:Copy
20824-016	110711	20824-016	High (High)		ation:Copy Writing
20824-017	110969	20824-017	Normal (Normal)	Accepted	Cluster, Sales Item Creation:Copy
20824-018	110970	20824-018	Normal	Digital Assets	Sales Item Creation:Copy Writing Cluster, Sales Item Creation:Copy
20824-019	110971	20824-019	Normal	Accepted	Sales Item Creation:Copy Writing Cluster, Sales Item Creation:Copy
20824-020	110972	20824-020	Normal	Digital Assets	Sales Item Creation:Copy Writing Cluster, Sales Item Creation:Copy
20824-021	110973	20824-021	Normal	Digital Assets	Sales Item Creation:Copy Writing Cluster, Sales Item Creation:Copy

Note that if editability of workflow variables or status flags is not desired, it can be disabled by checking the 'ReadOnly' option in the component configuration.

Browsing for products and assets

You can browse for products and assets by using the Tree navigator in the left hand side panel.



Browsing for Products

The blue tree shows a folder structure that contains the products that you are privileged to see. To expand/collapse the levels in the Tree, click the triangles to the left of the folders. To display details for a product, simply just click the product in the Tree. The product details will be displayed in the right hand side panel.

Browsing for Assets

The yellow tree shows a folder structure that contains the assets that you are privileged to see. To expand/collapse the levels in the Tree, click the triangles to the left of the folders. To see the asset in one of the folders, simply just click the folder. The content of the folder will be displayed in a table in the right hand side panel.

In the table you can select an asset by clicking it. The details of the selected asset will be displayed right below the table. If one or more assets have been selected you can now download the assets or add them to Basket. For more information on downloading assets , see "[Downloading assets](#)" on page 21 and for information on adding assets to Basket, see "[Adding assets to Basket](#)" on page 21

To go to an Asset detail editor screen you must click the ID of the asset (highlighted with bold text). For more information, see "[Editing and deleting assets](#)" on page 19.

For more information on the different view options, see "[Viewing and selecting assets](#)" on page 14.

Searching

Clicking the Search tab in the left hand side panel gives you a search panel with multiple search options. Enter your search criteria and click the Search button. To reset already entered search criteria, simply just click the Reset button.

The different search options are described below.

Main search

This is a broad search that will search for name and ID and attribute value valid for products and assets.

Suggestions will appear as you type. You can select one of the suggestions by clicking it.

Search Below

Here you can select the folder that you want to search below. Click the  icon, expand the folder hierarchy and select the relevant folder. The folder name will now be displayed in the value box. If you want to remove the search

below criteria, click the  icon and select the Clear option.

The default value is all folders that you are privileged to see.

Product Types

When searching for products, you can select the Product type(s) you would like to search for. Click one or more of the product types in the list (use ctrl/shift key to multi select) to select the product types.

The default value is all product types.

Assets Types

When searching for assets you can select the Asset type(s) you would like to search for. Click one or more of the asset types in the list (use ctrl/shift key to multi select) to select the asset types.

The default value is all asset types.

Additional search Criteria

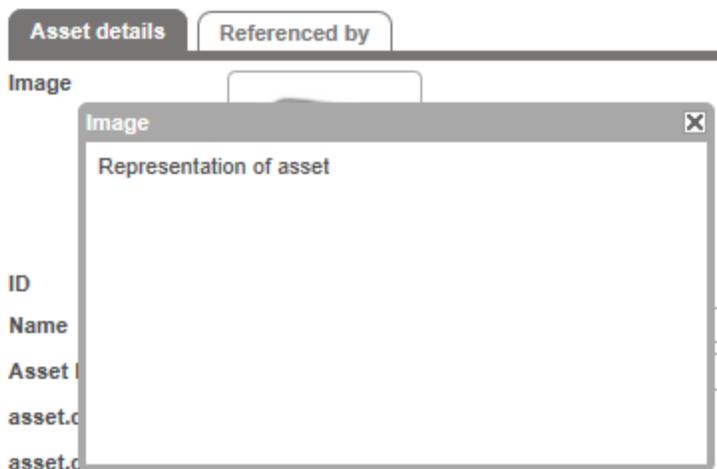
Besides the above listed search options a set of other search options are available in the Additional search criteria drop down list. Selecting one of these search options gives you a text box or a list (depending on the search option you have selected) to let you specify the search criteria. You can add multiple extra search option by clicking the **+** icon. This will give you the list of additional search options again.

Suggestions will appear as you type in text boxes. You can select one of the suggestions by clicking it.

In selection boxes you use ctrl/shift key to multi select if the search option supports multi values.

Getting help

For some of the search options context help is available. Moving the cursor over the label will cause a **i** icon to appear. Clicking this icon will make a help text box appear.



Search statistics and search results

Once a search has been executed a search statistics page will appear. From this page you can chose to see the whole search result or you can choose to narrow down the search result in terms of product / asset types.

Number of search results: 392 ⚙️ • EN All All • Main 🏠

Notice: As the search result exceeds 100 hits the search profile below is not filtered according to privileges. Thus, minor discrepancies between the search profile and the actual search result may occur.

-  [Product \(285\)](#)
-  [Product Folder \(26\)](#)
-  [Stateflow Product \(4\)](#)
-  [AutoAppWithBR \(2\)](#)
-  [EventQueueTriggerProd \(1\)](#)
-  [TIFF Image \(59\)](#)
-  [JPG Image \(8\)](#)
-  [EPS Image \(5\)](#)
-  [XML File \(1\)](#)
-  [PDF Document \(1\)](#)

[All \(392\)](#)

The search statistics page shows how many hits the search gave in total and also how the hits are distributed on Product and asset Types. You can click one of the types to narrow down the search result so that it only shows the result of that particular type. Or you can select All to see the whole search result.

Viewing and selecting assets

There are three different view modes when viewing assets. These viewing modes are available when browsing through the Tree hierarchy, investigating a search result or looking at the content of the Basket. You can toggle between the three view modes by clicking the relevant view mode buttons.



List View



This view lists the assets in a table showing thumbnail, ID, Name, Asset Type, File extension and asset description.

You can select one or more assets. If one or more assets have been selected you can download the assets or add them to Basket. For more information on downloading assets, see ["Downloading assets"](#) on page 21 and for information on adding assets to Basket, see ["Adding assets to Basket"](#) on page 21

To select all, click the Select All link in the tool bar. To deselect all click the Clear selection link in the tool bar.

To jump to an Asset detail editor screen you must click the ID of the asset (highlighted with bold text).

You can sort the list by any of the columns in the list by clicking the sorting/filtering icon next to the header labels in the table.



This will open a dialog where you can choose sort the column ascending or descending or apply a filter to only display certain values.

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The screenshot shows a table with two columns: 'ID' and 'Name'. The first row has '4395' in the ID column and 'KJR-7001-103' in the Name column. The second row has '4396' in the ID column. A dialog box is open over the table, with a mouse cursor pointing to the sorting icon next to the 'ID' header. The dialog box contains a 'Sort:' section with up and down arrows, a search input field with a magnifying glass icon, and a list of items with checkboxes: '(Select all)', '4395', and '4396'. At the bottom of the dialog, there are two buttons: 'Apply filter' and 'Reset filter'. The text '2 / 2' is visible at the bottom left of the dialog.

Filmstrip View



The filmstrip view displays the assets as thumbnail tiles in a row. Selection and de-selection works as in the List view mode.

Gallery View



Here the thumbnail tiles are structured in a grid allowing you to view a lot of thumbnails at a time. Selection and deselection works as in the List view mode.

Select all / Clear selection

To select all items you can click the Select All link in the tool bar.



This will select and highlight all items, also items not displayed on the current page. For further details on paging, see "[Paging](#)" below.

To deselect all items you can click the Clear selection link in the tool bar.



Paging

If a search result, folder or Basket contains more than 25 items, the items will be displayed in multiple pages, To navigate back and forth between these pages use the arrows in the paging tool bar placed below the items in any of the views.



Editing and deleting products

In the Product detail screen you can edit attribute values for a specific product. The product details screen appears when you select a product in the Tree navigation. The product detail screen have four tabs: "Product attributes", "References and Classifications", "Referenced by" and "Images and Documents".

Product attributes tab

Here the Name, ID and attribute values of the selected product are displayed. Editable values are shown in white text fields.

References and Classifications tab

The default configuration shows Classification links of type "Default Classification Product Link" and Asset references of type "Accessories". You can add, delete or modify these links / references.

Referenced By tab

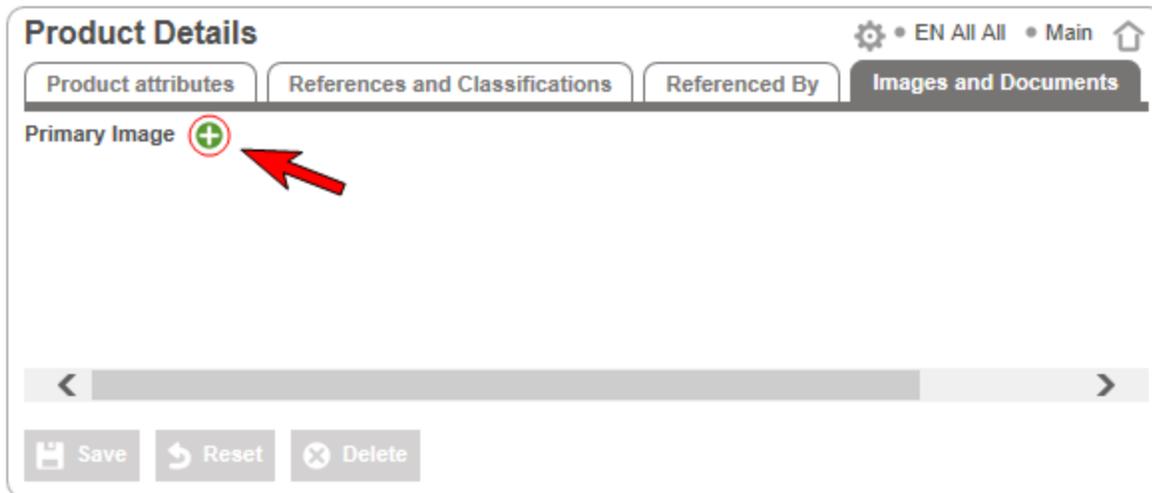
Here the objects that reference the currently selected object are listed.

Images and documents tab

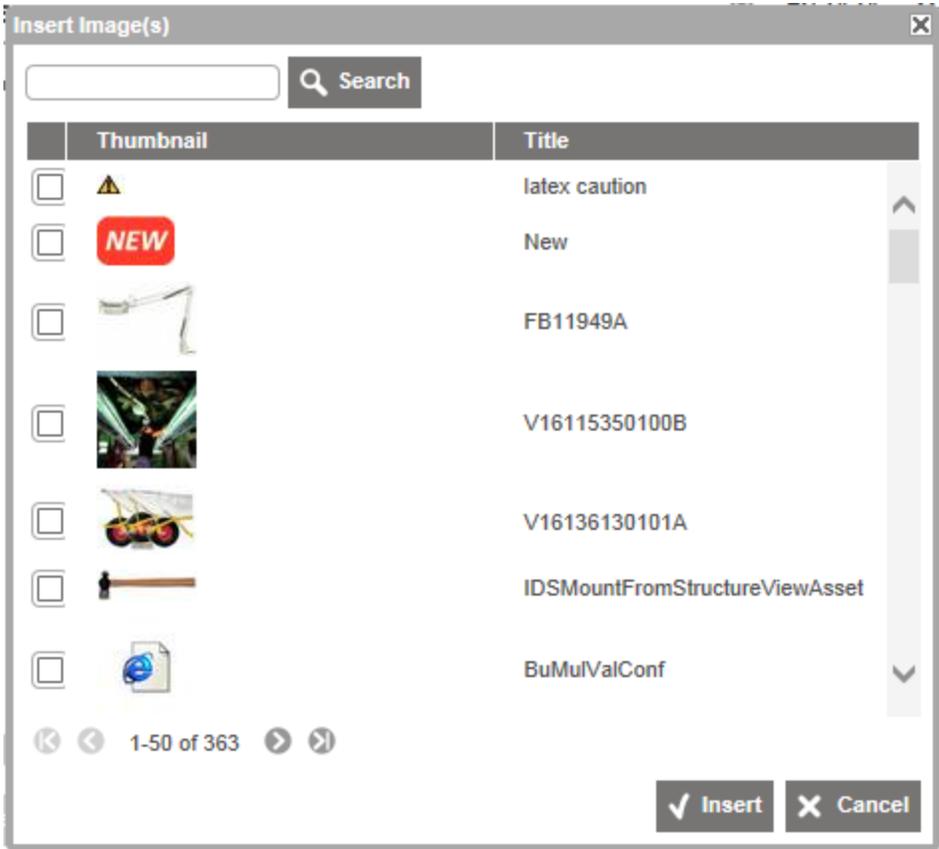
The default this tab is configured shows the primary image for the product. You can add a new reference to a primary image or remove an existing reference to a primary image

Add Primary Image reference

To add a reference to a Primary Image:



1. Click the Add button. A node chooser dialog appears.



- 2. Limit the assets by searching for a named asset. Navigate to the relevant image and click the OK button.
- 3. The selected Image will be inserted as the Primary Image.

Tip: You can click on the ID of the referenced image to jump to the detail screen for that image.

Remove Primary Image reference

If you want to remove a Primary Image reference, click the red cross next to the ID of the referenced image. The reference to the Primary image will be removed.



Save button



Clicking the Save button will save the values of the selected asset to the data base.

Reset button



The Reset button lets you reload the asset values from the server.

Approve button



This button saves the values of the selected asset to the data base and also, it moves the selected assets to the Approved Workspace.

Delete button



This allows you to delete the selected asset from the data base.

Proof View button



Clicking this button will give you a proof view of the selected product.

Editing and deleting assets

In the asset detail screen you can edit attribute values for a specific asset. The asset details screen appears when you select an asset in a List View or if you click the ID in the List view. The asset detail screen have two tabs: Asset details and Referenced by.

Asset details tab

Here the Name, ID and attribute values of the selected asset are displayed. Editable values are shown in white text fields.

Referenced By tab

Here the list of Products that references the selected asset are listed.

Save button



Clicking the Save button will save the values of the selected asset to the data base.

Reset button



The Reset button lets you reload the asset values from the server.

Save and approve button



This button saves the values of the selected asset to the data base and also, it moves the selected assets to the Approved Workspace.

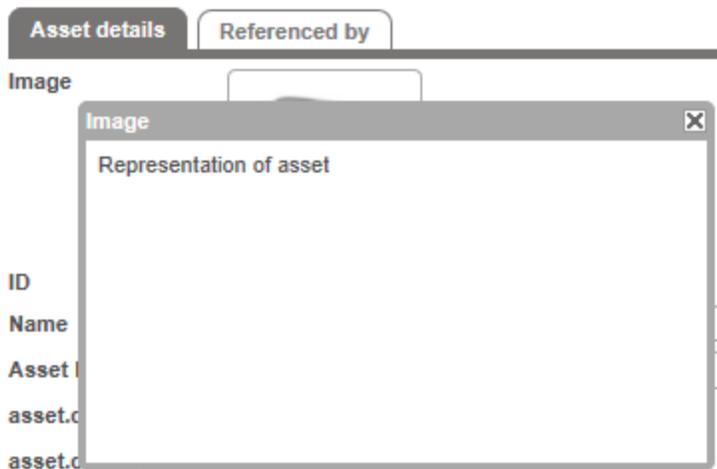
Delete button



This allows you to delete the selected asset from the data base.

Getting help

For some of the information displayed at the Asset detail screen context help is available. Moving the cursor over such labels will cause a  icon to appear. Clicking this icon will make a help text box appear.



Basket

The Basket lets you collect assets that you want to investigate and possibly edit or download.

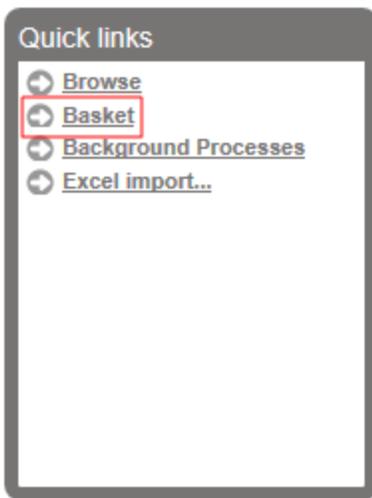
Adding assets to Basket

To add assets to the Basket you must first select one or more asset in the List View, Filmstrip view or Gallery view. Then click the Add to Basket button in the tool bar.



Showing Basket content

To display the content of your Basket, click the Show content button in the Basket panel.



Removing selected assets from Basket

You can remove selected assets from your Basket by selecting the assets, then clicking the "Remove from Basket" button in the tool bar.



Deleting all content of Basket

To delete all content of your Basket, click the Clear Basket button in the Basket panel.



Downloading assets

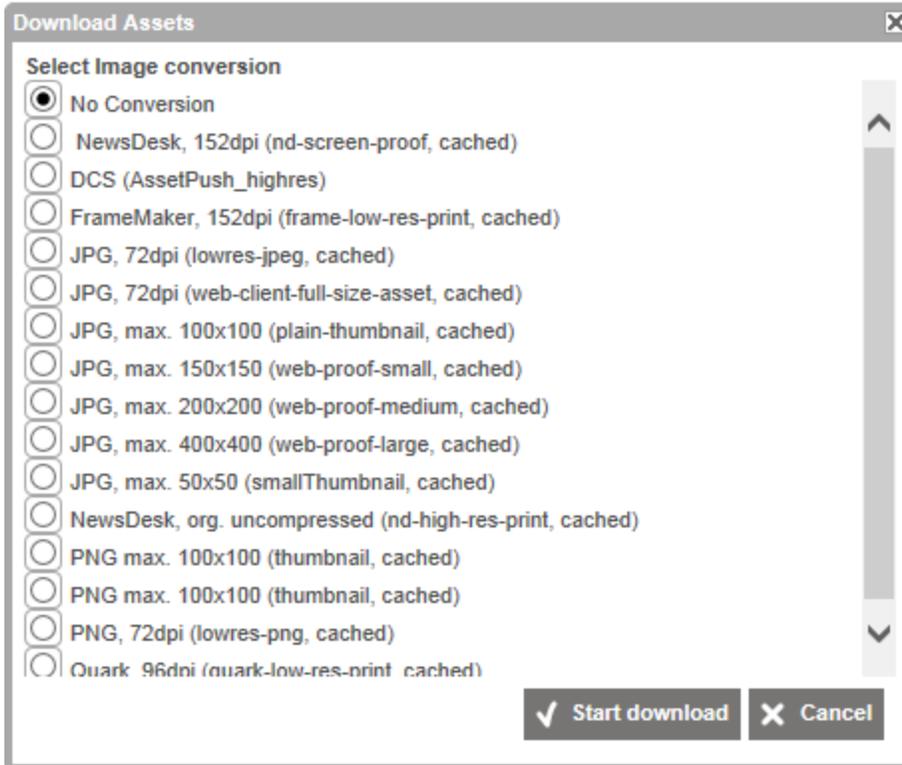
In STEP Asset Portal you can download assets to your hard drive and optionally convert images using pre-configured image conversion pipelines. This is done by starting a download job and once the download job is finished you can get the downloadable file.

To download one or more assets:

1. In List view, Filmstrip View or Gallery view select one or more assets you wish to download.
2. Click the Download Assets button



3. A Download Assets dialog appears listing the available pipelines on the system.



4. If you want to convert images select the pipeline you want to use. If you do not want to use conversion leave the radio button on No Conversion (default option).
5. Click Start Download button.
6. A Download detail screen appears and a download job will now start.

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Background Process: BGP_7871 ⚙️ • EN All All • Main

Download in progress.
You may leave this screen and manage your downloads later in the Download Queue.

ID BGP_7871
Description Downloading 1 assets.
Started 11:16:59 05 nov 2013
Started By N/A
Elapsed
Progress 0
Status waiting
#Errors 0

1

1



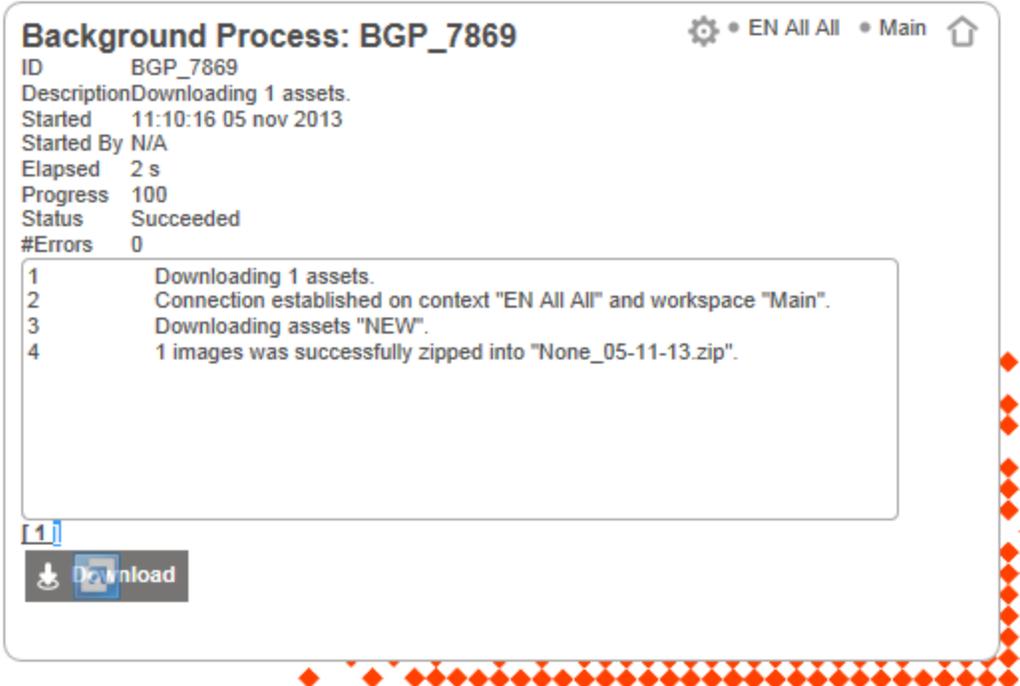
Important: You do not have to wait for the download job to finish. You can work as normal while the download job is executed and return to the download detail screen at a later time to get the download file.

Note: Assets will be placed in a zip file that you can download once the download job has finished.

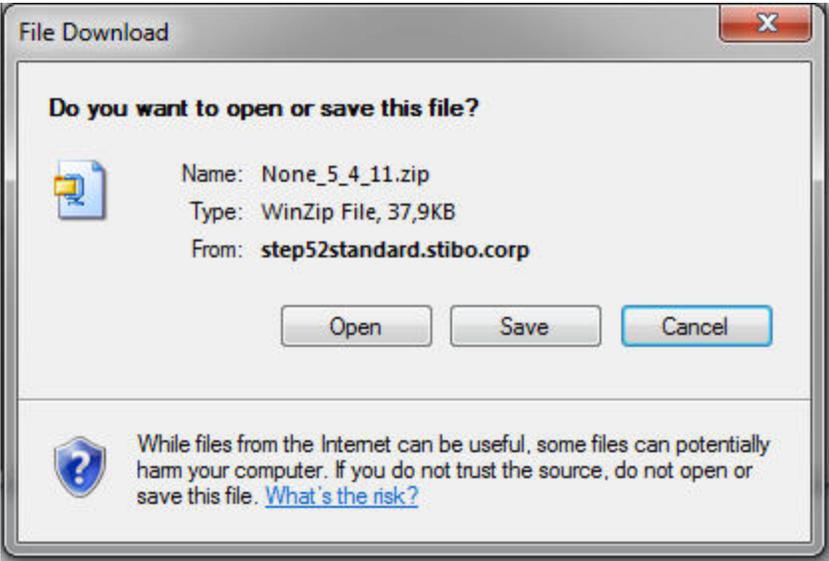
Note: The download job will be placed in a download list. Open a download job in the list to view details of the download job and to download the zip file.

- Once the download job has finished you can download the zip file by clicking the Download button.

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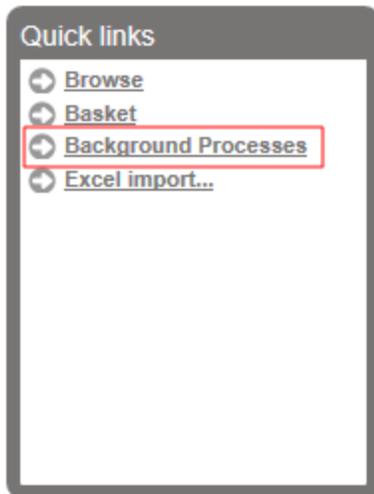
8. A File Download dialog appears.



9. You can now either open the zip file or download it to you hard drive.

Show Download list

All your download jobs are placed in a list. To display the download list select the Downloads panel in the left hand side panel and then click the "Show download list" link.



This will display the list of your download jobs.

Background processes for: AssetDownload; Exporter ⚙️ • EN All All • Main 🏠

AssetDownload

Select operation for background processes ▼

<input type="checkbox"/>	ID	Description	Started	Started By	Elapsed	Progress	Status	#Errors
<input type="checkbox"/>	BGP_7871	Downloading 1 assets.	11:16:59 05 nov 2013	N/A	5 s	100	Succeeded	0
<input type="checkbox"/>	BGP_7870	Downloading 1 assets using pipeline "web-client-full-size-asset".	11:14:05 05 nov 2013	N/A	3 s	100	Succeeded	0
<input type="checkbox"/>	BGP_7869	Downloading 1 assets.	11:10:16 05 nov 2013	N/A	2 s	100	Succeeded	0

Exporter

Select operation for background processes ▼

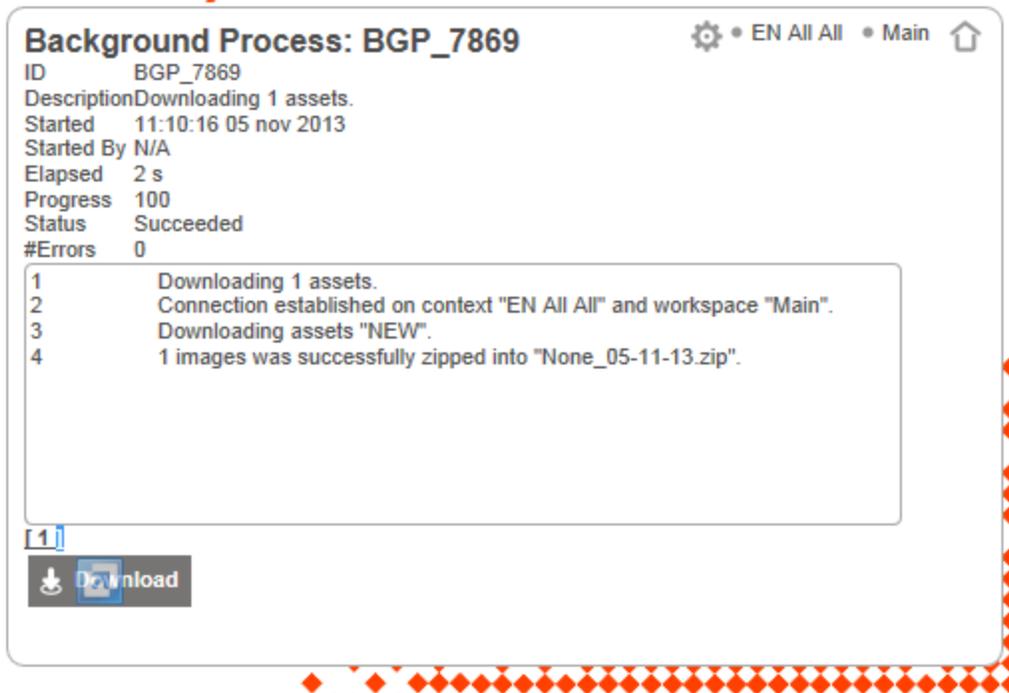
<input type="checkbox"/>	ID	Description	Started	Started By	Elapsed	Progress	Status	#Errors
<input type="checkbox"/>	BGP_7874	Export eCatalog 'CrtECat'	13:01:40 05 nov 2013	N/A	5 s	100	Succeeded	0
<input type="checkbox"/>	BGP_7873	Export eCatalog 'CrtECat'	12:50:14 05 nov 2013	N/A	1 s	100	Succeeded	0
<input type="checkbox"/>	BGP_7872	Export eCatalog 'CrtECat'	12:25:03 05 nov 2013	N/A	6 s	100	Succeeded	0

Downloading the zip file from the Download list

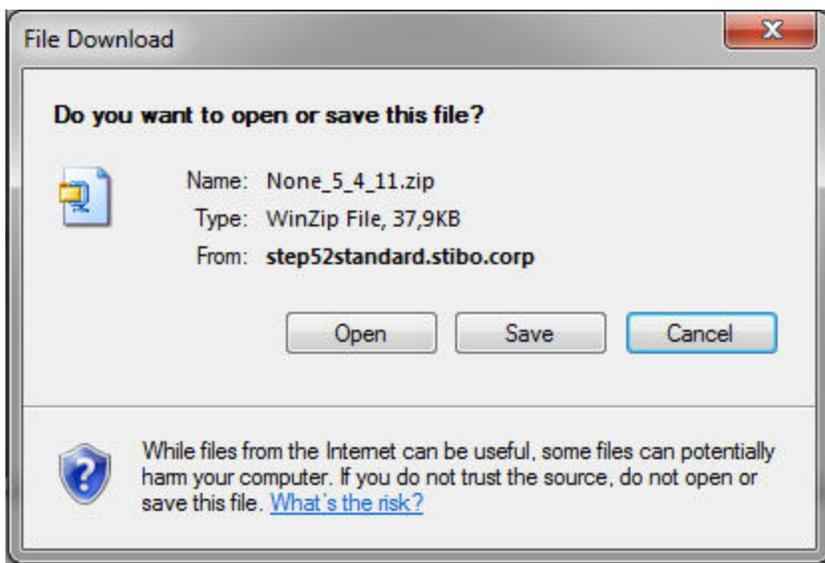
You can always download a zip file from a finished download job. To download the zip file:

1. Click on the relevant download job in the list
2. A download detail screen appears

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3. Click the Download button
4. A File Download dialog appears



5. You can now either open the zip file or download to your hard drive

Deleting download jobs

To delete download jobs, tick the check box next to the download job you want to delete. In the "Select operations for download processes" select Delete.



Background processes for: AssetDownload EN All All • Main

AssetDownload

Select operation for background processes

ID	Description	Started	Started By	Elapsed	Progress	Status	#Errors
<input type="checkbox"/>	BGP_7871	Downloading 1 assets.	11:16:59 05 nov 2013	N/A	5 s	100	Succeeded 0
<input type="checkbox"/>	BGP_7870	Downloading 1 assets using pipeline "web-client-full-size-asset".	11:14:05 05 nov 2013	N/A	3 s	100	Succeeded 0
<input checked="" type="checkbox"/>	BGP_7869	Downloading 1 assets.	11:10:16 05 nov 2013	N/A	2 s	100	Succeeded 0

Tip: You can select all download jobs in the list by clicking the checkbox in the upper left corner of the download list.

Corner Bar

On all screens (except the home page screen), there is a menu in the top right corner. This can be used to enter the portal designer, change context/workspace or navigate to the home page screen.



EN All All • Main

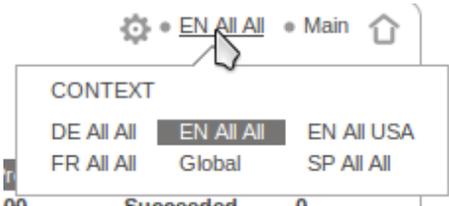
Thumb	ID	Name	Type	File extension	Asset Description
-------	----	------	------	----------------	-------------------

Changing context

To change the context click the current context indicator in the corner bar.



The panel will slide down and you can now select the context you want.



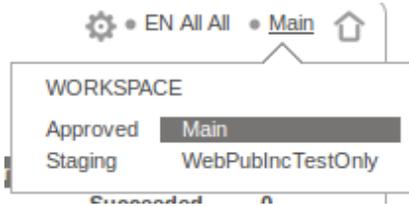
Clicking on one of the contexts will make the panel slide up again and the name of the current selected context will be displayed on the button.

Changing workspace

To change the workspace click the second left button in the top bar settings panel.



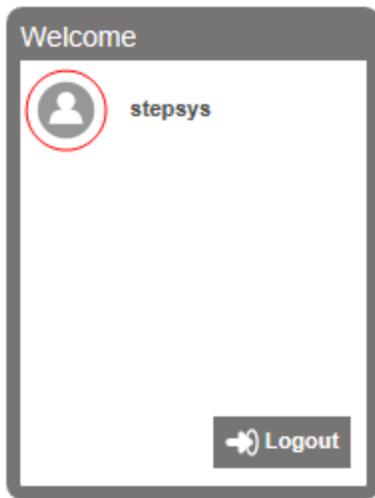
The panel will slide down and you can now select the workspace you want.



Clicking on one of the workspace will make the panel slide up again and the name of the current selected workspace will be displayed on the button.

User details

The user ID and e-mail address of the current user can be found by clicking on the user icon in the Welcome widget on the home page screen.



This make the User detail screen to appear.

Change password

In the User detail screen you can change your password.

User

User ID	STEPSYS
Email	stepsys@domain.com
New password	<input type="password"/>
Repeat new password	<input type="password"/>

1. Enter your current password in the "Old password" field.
2. Enter your new password in the "New password" field
3. Enter your new password in the "Repeat new password" field.
4. Click the Save button

Your new password has been saved and will take effect on next login.

Log out

To log out of the portal you must click the "Logout" button on the Welcome widget on the home page screen.



This will log you out and take you to the login screen.

StiboSystems

Username

Password

 You are now logged out of the portal

